

Mexico Information Technology Report Q3 2016

<https://marketpublishers.com/r/MC195A99143EN.html>

Date: May 2016

Pages: 62

Price: US\$ 1,295.00 (Single User License)

ID: MC195A99143EN

Abstracts

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BMI View: IT spending growth slowed in Mexico in 2013-2015 as weaker economic growth and then peso depreciation dragged on performance - but we have a stronger outlook for the economy and IT market over the medium term. We forecast IT spending will increase at a CAGR of 8.1% over 2016-2020, with even stronger growth in USD terms as a result of peso appreciation. Our bullish retail market outlook is based on a positive assessment of medium term household income trends while enterprise spending should accelerate as sentiment strengthens, and the outlook for cloud computing, enterprise applications, and outsourcing are especially bright.

Latest Updates & Industry Developments

Computer Hardware Sales: will increase from MXN117.9bn in 2016 to MXN150.2bn in 2020 at a compound annual growth rate (CAGR) of 6.2%. PC penetration rates point to first-time buyer opportunity while rising incomes should also alleviate price sensitivity in the mid-market and enable vendors to target higher margin sales.

Software Sales: will increase from MXN65.7bn in 2016 to MXN93.0bn in 2020 at a CAGR of 9.1%. We have a positive outlook for enterprise application spending among large enterprises and the wider availability of software-as-a-service should broaden adoption among SMEs.

IT Services Sales: will increase from MXN107.3bn in 2016 to MXN154.7bn in 2020 at a CAGR of 9.6%. Infrastructure cloud service growth is expected to outperform as telecoms infrastructure is upgraded and as competition strengthens in the wake of new regulations.

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