

# Peru Information Technology Report Q3 2016

<https://marketpublishers.com/r/P7A7A2F5A9CEN.html>

Date: May 2016

Pages: 68

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

ID: P7A7A2F5A9CEN

## Abstracts

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**BMI View:** We believe Peru's IT market has quite strong growth potential over the medium term, although economic headwinds will continue to present challenges in 2016. It is one of the smaller regional IT markets, and the local industry is relatively underdeveloped, particularly in the hardware segment. Rising incomes and sol appreciation point to a brighter medium term trend, and we expect vendors to be able to tap into opportunities presented by low device and solution penetration among households and enterprises as economic conditions become more favourable. The major downside risk to our bullish outlook is weaker Chinese demand for the country's raw materials.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** PEN2.94bn in 2016 to PEN3.83bn in 2020. After contraction in 2015 and stagnant market in 2016, we believe strong household income growth from 2017 will allow vendors to tap the low PC penetration in Peru, particularly outside Lima where penetration is much lower.

**Software Sales:** PEN1.08bn in 2016 to PEN1.52bn in 2020. The local software industry is expanding, but international vendors will still benefit from more complex demands from large Peruvian enterprises as they modernise.

**IT Services Sales:** PEN2.36bn in 2016 to PEN3.54bn in 2020. IT services will outperform in 2016 in challenging economic environment due to cost savings for enterprises, while over the medium term cloud adoption and outsourcing will drive strong demand growth.

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