

ANNUAL SURVEY ON INFOCOMM INDUSTRY FOR 2013



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PART I: SURVEY COVERAGE AND METHODOLOGY

Introduction

Conducted since 1999, the 2013 Annual Survey of the Infocomm Industry (“Survey”) is the 15th in the series, with the objective of tracking the market performance of the infocomm industry.

Survey Methodology

The Survey covered a representative sample of infocomm establishments which was selected from the establishment sampling frame maintained by the Singapore Department of Statistics (DOS).

Notes on Data

Past years’ data are included for comparison purposes where appropriate. Due to rounding, the sum of the individual parts may not add up to the total or 100%.

PART II: SURVEY FINDINGS

1. EXECUTIVE SUMMARY

- a. Infocomm industry revenue saw a CAGR growth of 16.1% from 2008 to 2013, to reach S\$156.3 billion in 2013, largely due to re-exports of smartphones, tablets and storage devices in the hardware segment.
- b. Exports made up about 69.0% of the infocomm industry and it grew by 25.0% CAGR from 2008 to 2013. Domestic revenue grew by 4.5% CAGR during the same period.
- c. East Asia was the top export destination for infocomm products and services in 2013, accounting for about 47.3% of export revenue.

2. PERFORMANCE OF THE INFOCOMM INDUSTRY

2.1 Infocomm Industry Revenue

Infocomm revenue saw CAGR growth of 16.1% for the period of 2008 to 2013, driven by re-exports in the hardware segment

In 2013, infocomm industry revenue reached \$156.3 billion (Chart 1), reflecting a CAGR growth of 16.1% for the period of 2008 to 2013 which was largely aided by re-export growth of smartphones, tablets and storage devices in the hardware segment (Chart 2).

Chart 1: Infocomm industry revenue by segment

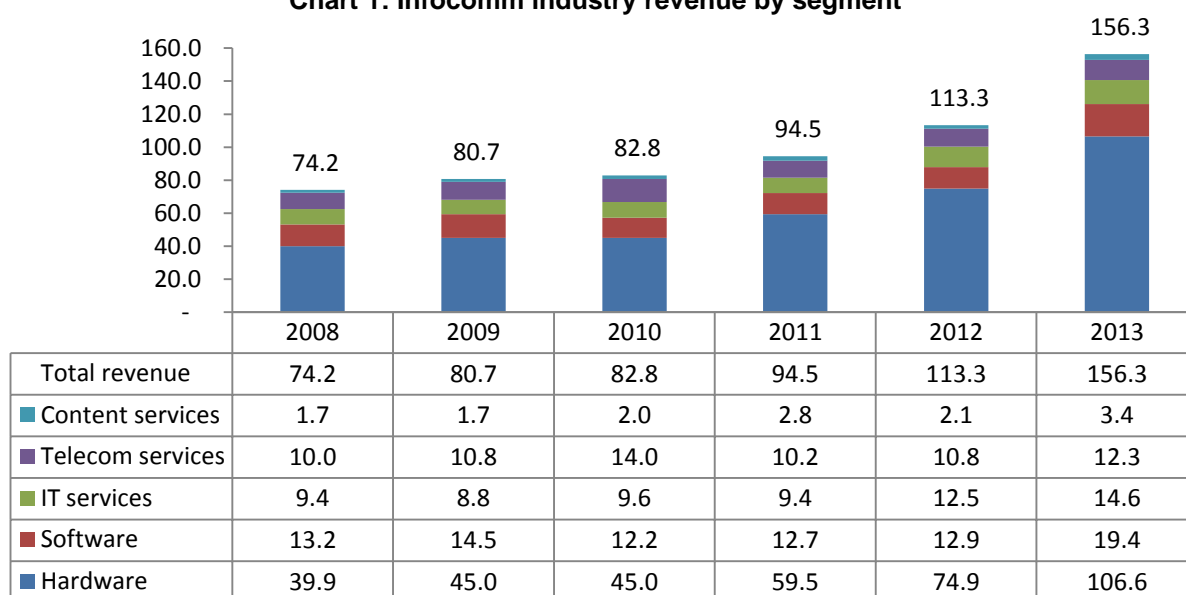
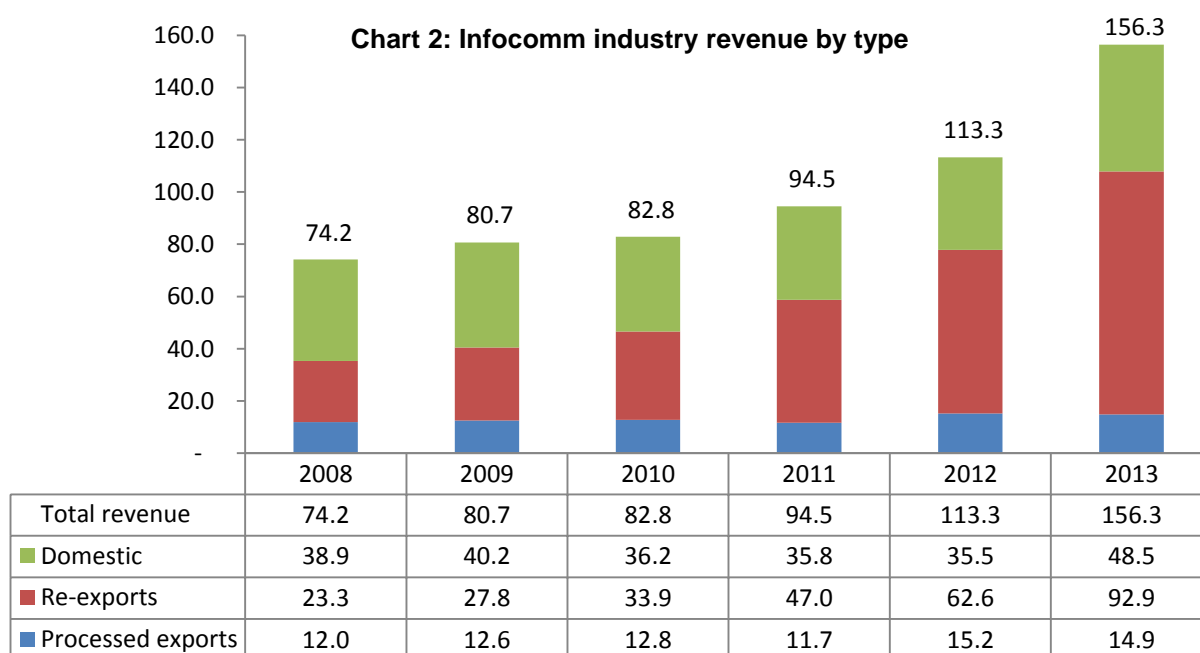


Chart 2: Infocomm industry revenue by type



2.2 Infocomm Export Revenue Growth and Market Composition

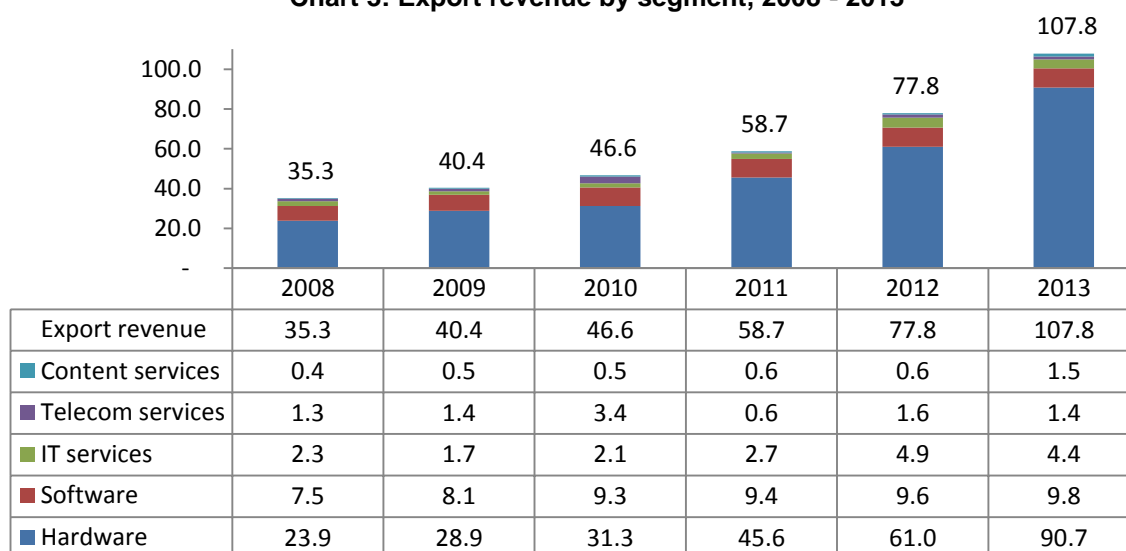
Hardware segment drove industry revenue growth for export and domestic revenue

Exports were dominated by revenue from the hardware segment with a share of 84.1% (Table 1). Export revenue growth was primarily driven by the hardware segment which saw an increase of \$30 billion in 2013 (Chart 3).

Table 1: Export revenue by composition, 2013

2013	Hardware	Software	IT services	Telecom services	Content services	Total infocomm
Share of infocomm revenue (%)	84.1%	9.1%	4.0%	1.3%	1.4%	100.0%

Chart 3: Export revenue by segment, 2008 - 2013



2.3 Infocomm Domestic Revenue Growth and Market Composition

Revenue from the hardware segment led the way in the growth of domestic revenue (Chart 4). Hardware segment remained the largest contributor of domestic revenue with a share of 32.7% (Table 2).

Chart 4: Domestic revenue by segment

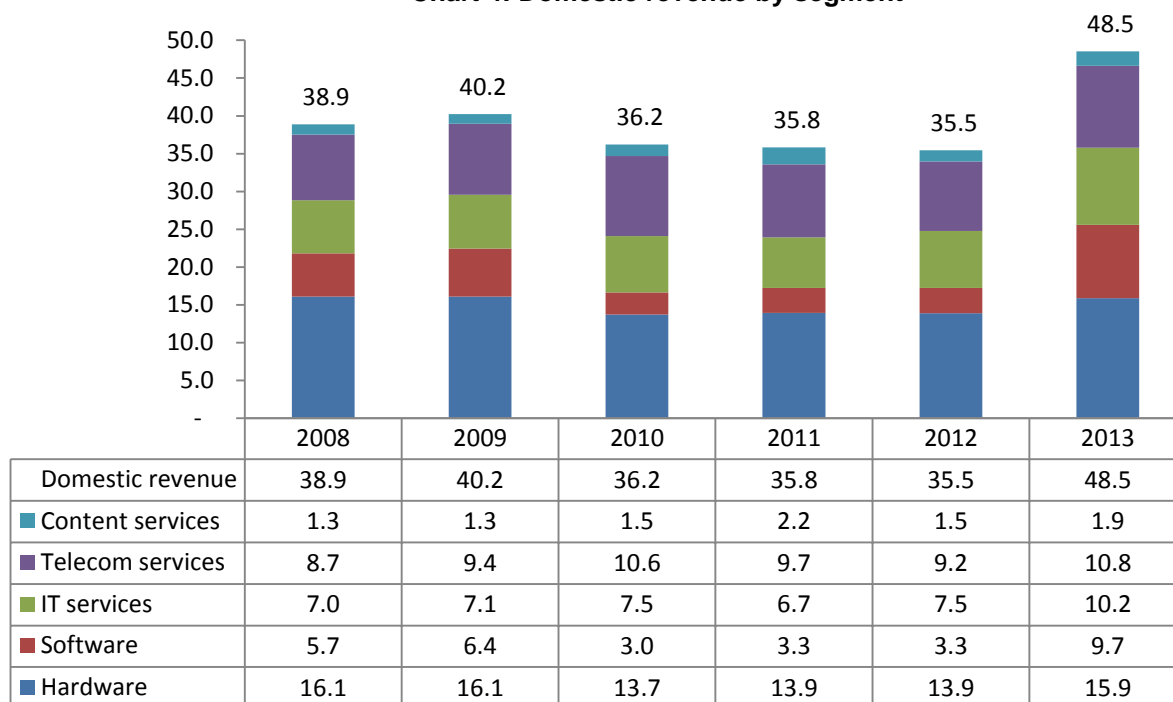


Table 2: Domestic revenue by composition, 2013

2013	Hardware	Software	IT services	Telecom services	Content services	Total infocomm
Share of infocomm revenue (%)	32.7%	19.1%	21.1%	22.3%	3.9%	100.0%

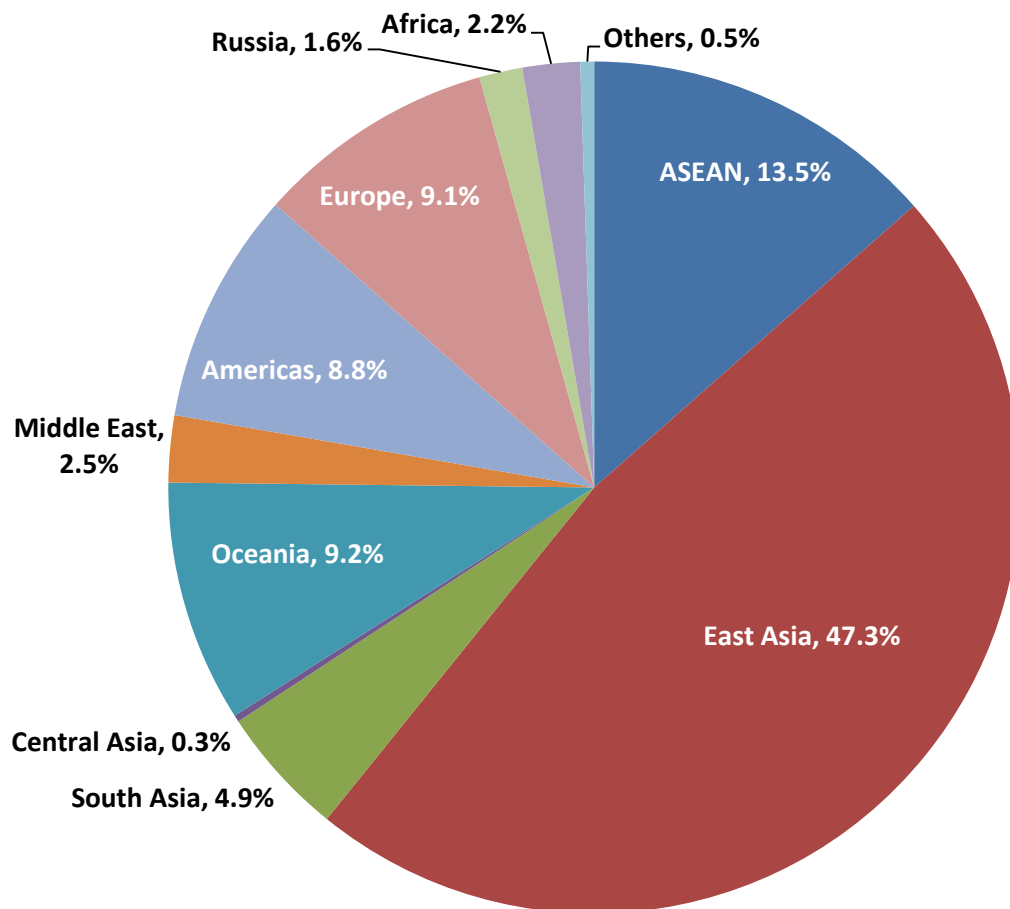
2.4 Export Destinations

East Asia was the top export destination region

2.4.1 By Regions

In 2013, the top three export destinations by region¹ were East Asia (47.3%), ASEAN (13.5%) and Oceania (9.2%) (Chart 5).

Chart 5: Export revenue by region, 2013



Export revenue: S\$ 107.8b

¹ Regions were grouped in the following manner:

ASEAN: Brunei, Malaysia, Myanmar, Indonesia, Vietnam, Thailand, Philippines and rest of ASEAN;

East Asia: Japan, China, Hong Kong, South Korea, Taiwan and rest of East Asia;

South Asia: India, Pakistan, and rest of South Asia;

Central Asia: Kazakhstan, and rest of Central Asia;

Oceania: Australia, New Zealand, and rest of Oceania;

Middle East: Saudi Arabia, Kuwait, Qatar, UAE, Bahrain, Oman and rest of Middle East;

Americas: US, Canada, Brazil, rest of Latin America (excluding Brazil);

Europe: European Union, and rest of Europe;

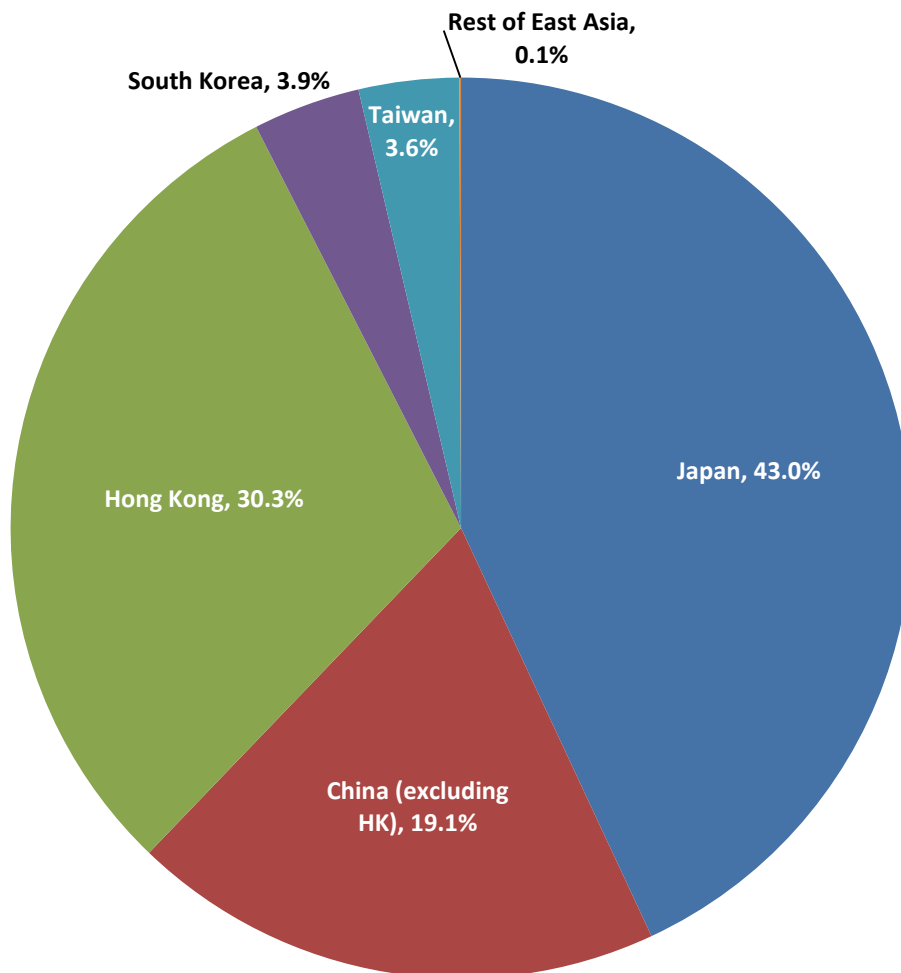
Russia: Russia;

Africa: North Africa, South Africa, rest of Africa.

2.4.2 Exports to East Asia

In East Asia, Japan (43.0%), Hong Kong (30.3%) and China (excluding Hong Kong) (19.1%) were the top three export destinations (Chart 6).

Chart 6: East Asia export revenue by destination, 2013

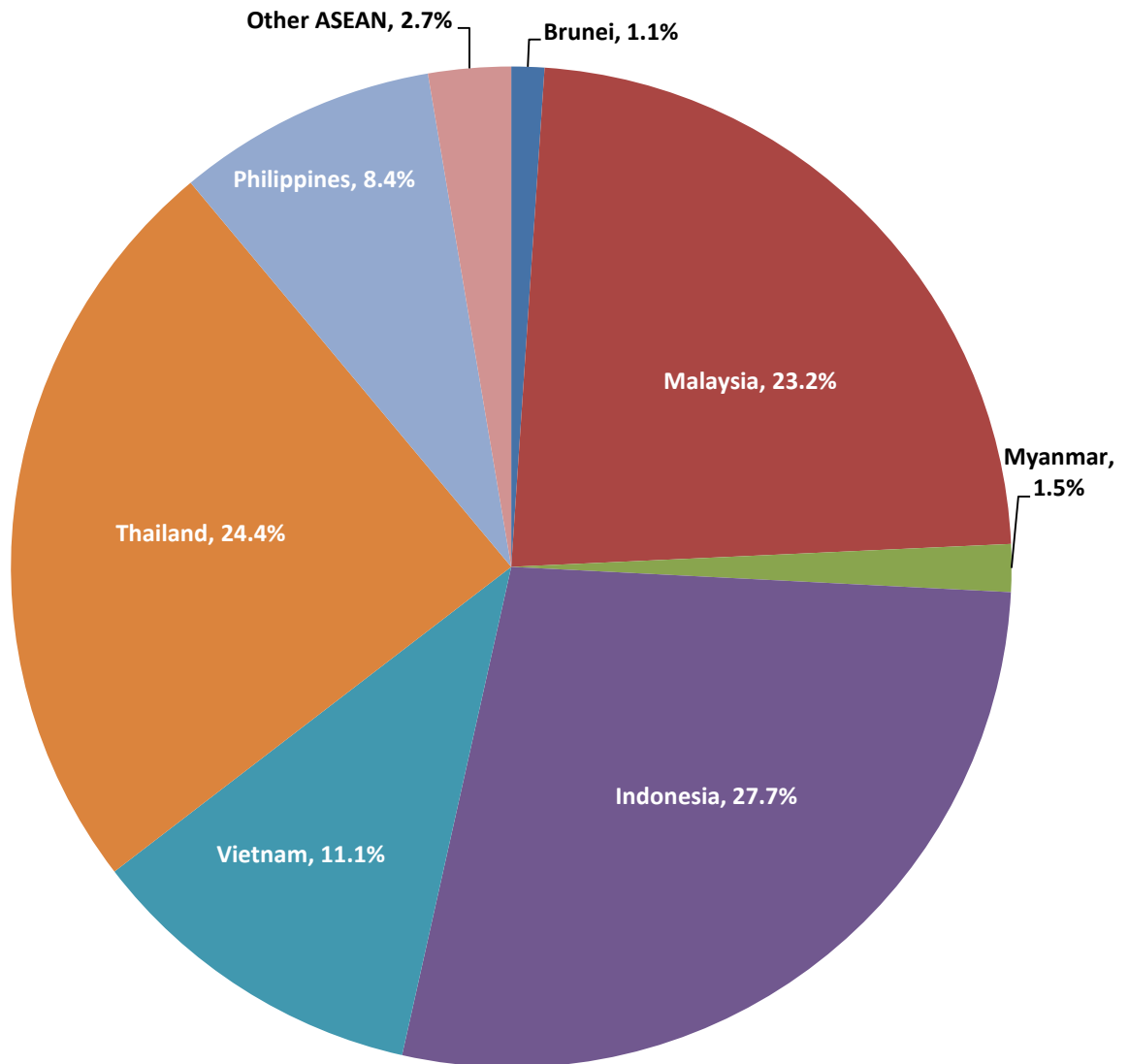


Export revenue: S\$ 51.0b

2.4.3 Exports to ASEAN

Amongst the ASEAN countries, Indonesia (27.7%), Thailand (24.4%) and Malaysia (23.2%) were behind more than three-quarters of ASEAN export revenue (Chart 7).

Chart 7: ASEAN export revenue by destination, 2013

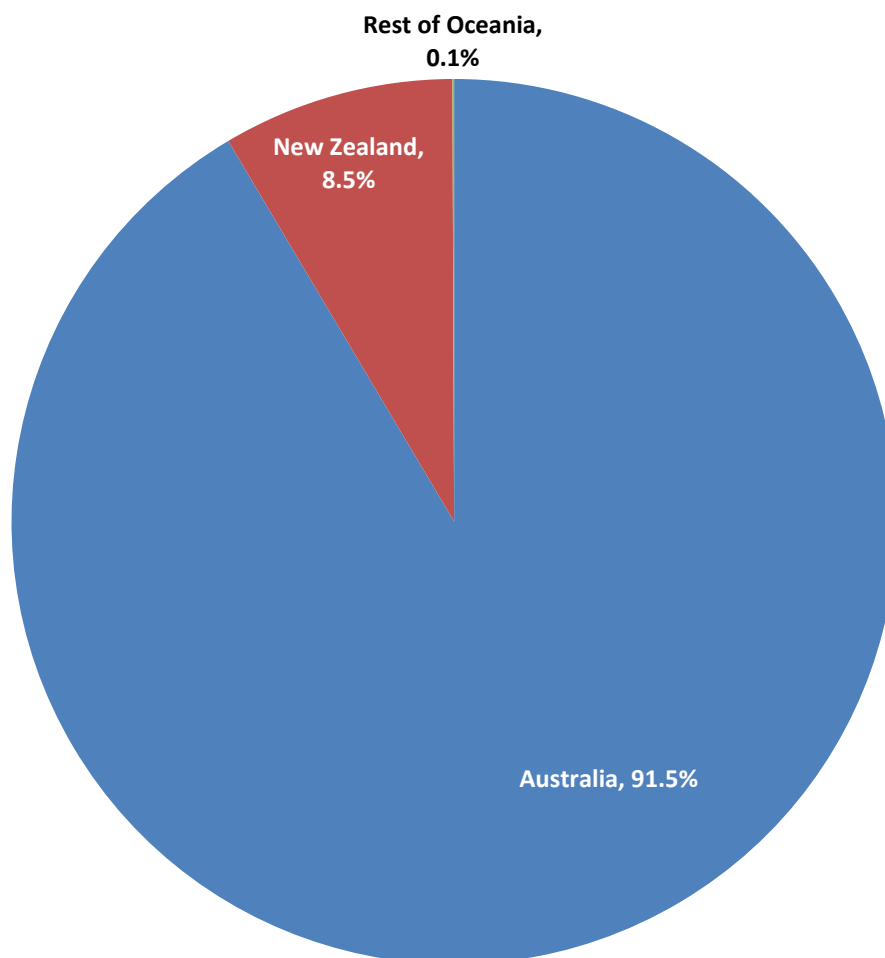


Export revenue: S\$ 14.6 b

2.4.4 Exports to Oceania

Within the Oceania region, Australia was behind more than 90% of export revenue (Chart 8).

Chart 8: Oceania export revenue by destination, 2013

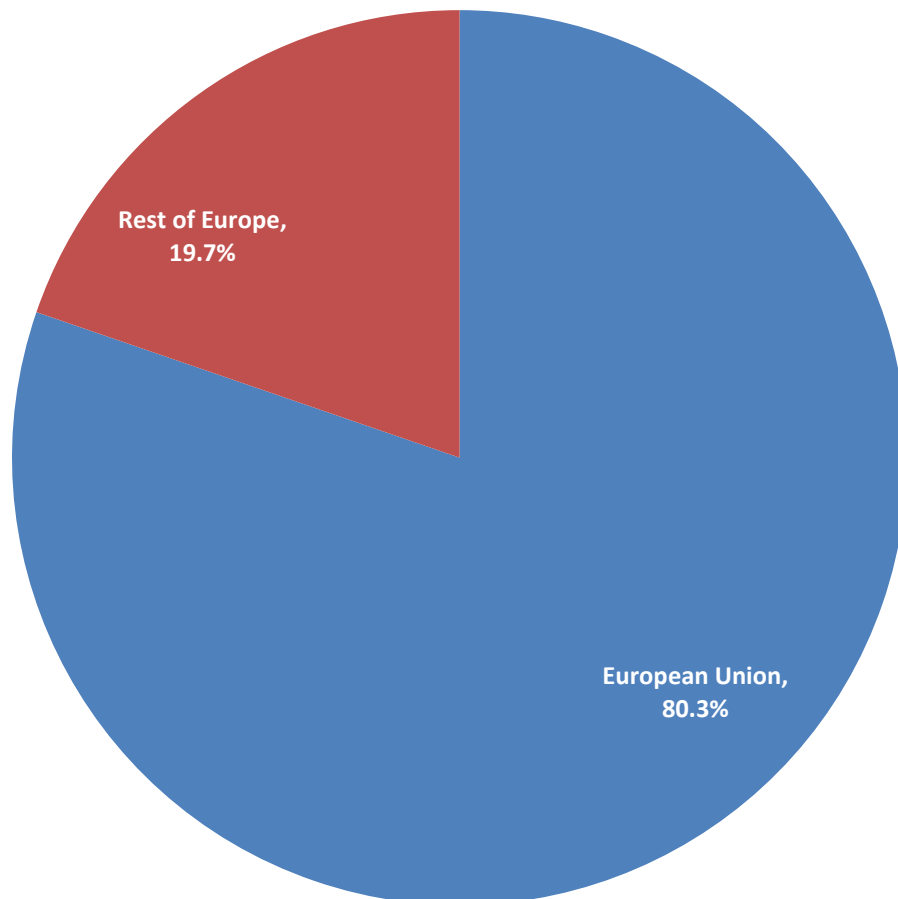


Export revenue: S\$ 9.9 b

2.4.5 Exports to Europe

The majority of Europe exports revenue came from that of European Union with a share of 80.3% ([Chart 9](#)).

Chart 9: Europe export revenue by destination, 2013

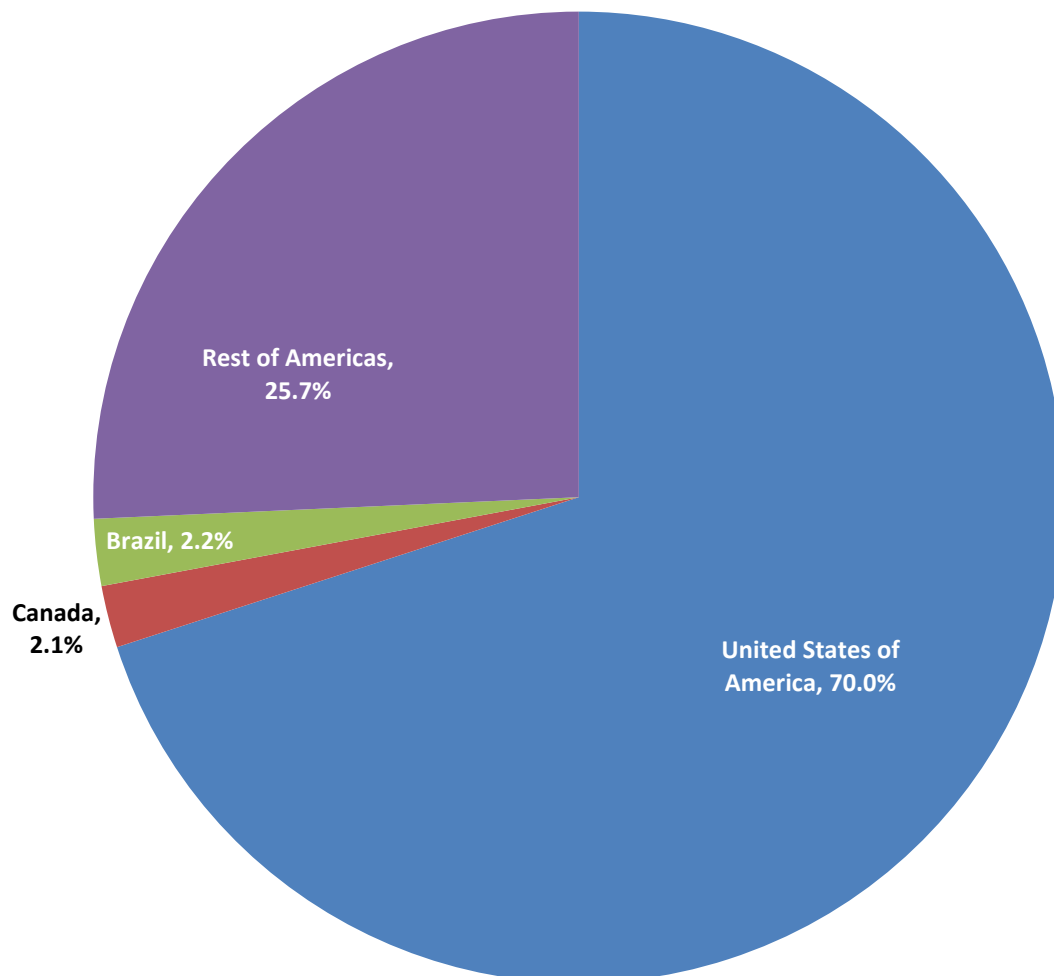


Export revenue: S\$ 9.8 b

2.4.6 Exports to Americas

USA was the top export destination in the Americas with about 70.0% share of the export revenue (Chart 10).

Chart 10: Americas export revenue by destination, 2013



Export revenue: S\$ 9.5 b