

# ANNUAL SURVEY ON INFOCOMM INDUSTRY FOR 2010

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## **PART I: SURVEY COVERAGE AND METHODOLOGY**

## **1. Introduction**

Infocomm industry surveys have been carried by IDA annually since 1999. This is the 12<sup>th</sup> in the series.

## **2. Survey Objective**

The objective of the Survey is to assess the performance of the infocomm industry in the year 2010.

## **3. Methodology**

The Survey covered a representative sample of infocomm establishments which are grouped into the following five main segments within the infocomm industry cluster:

- Hardware
- Software
- IT Services
- Telecom Services
- Content Services

The sample was selected from the Establishment Sampling Frame maintained by the Singapore Department of Statistics. Data collection (via self-administered questionnaires by mail/email/Internet submission) and processing for the Survey was carried out from Jan to May 2011.

## **4. Notes on Data**

Past years' data are included for comparison purposes where available. Due to the rounding of figures to the nearest whole number, the sum of individual figures may not add up to the total or 100%.

## **PART II: SURVEY FINDINGS**

## 1. EXECUTIVE SUMMARY

### Overall Performance

- The infocomm industry revenue saw a growth of 12% to reach \$70.39 billion in 2010, from \$62.74 billion in 2009.
- The *Hardware* segment remained the largest contributor to the infocomm industry revenue, with a share of 53% of the revenue followed by the *Software* and *Telecom Services* segments contributing 16% each to the revenue.
- Similar to previous years, more than half of the infocomm industry revenue was attributed to exports.

### Domestic Market

- Domestic revenue grew 7% to reach \$23.76 billion in 2010, from \$22.29 billion in 2009.
- The *Telecom Services* segment remained the largest contributor (34%) to domestic revenue.

### Export Market and Destinations

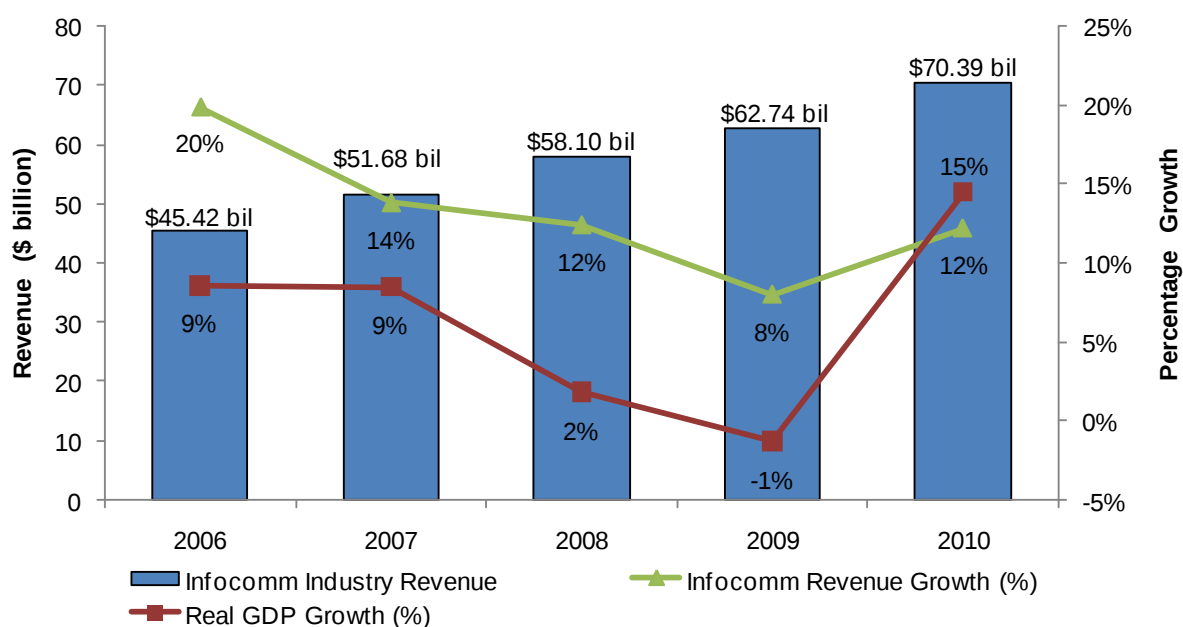
- Export revenue increased by 15% to reach \$46.62 billion in 2010, with positive growth across all segments.
- The *Hardware* segment continued to be the largest contributor (67%) to the export revenue.
- More than half of the export revenue was attributed to exports to the regions in Asia, with ASEAN as the top destination.
- Within the ASEAN region, exports to Indonesia and Malaysia made up about 65% of export revenue.

## 2. PERFORMANCE OF THE INFOCOMM INDUSTRY

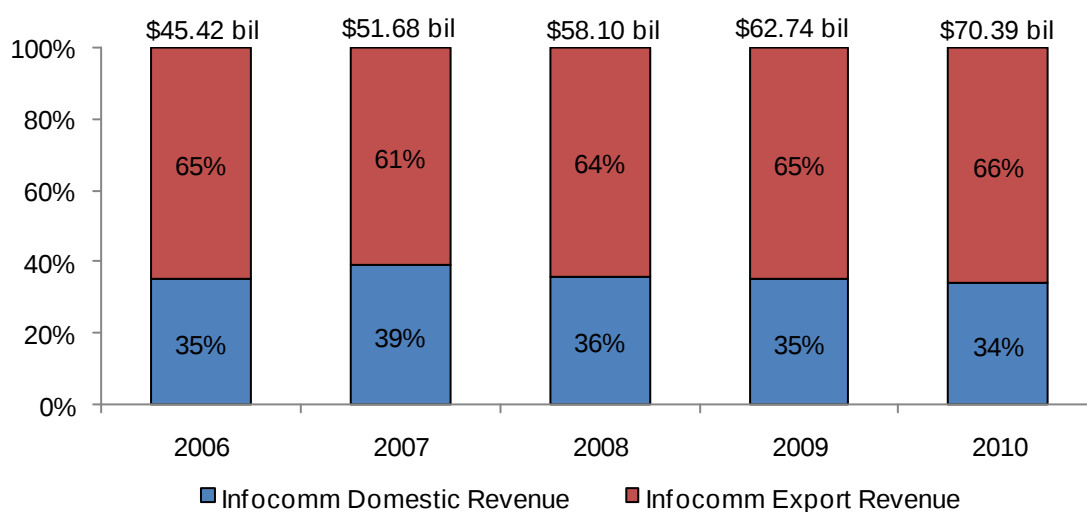
### 2.1. Infocomm Industry Revenue

Together with the recovery of the economy, the infocomm industry grew faster at 12% to reach \$70.39 billion in 2010 ([Chart 2.1](#)). Export revenue made up of 66% of the overall revenue ([Chart 2.2](#)). The domestic market rebounded to 7% growth from the fall in 2009 while export revenue maintained its growth at 15% ([Chart 2.3](#)).

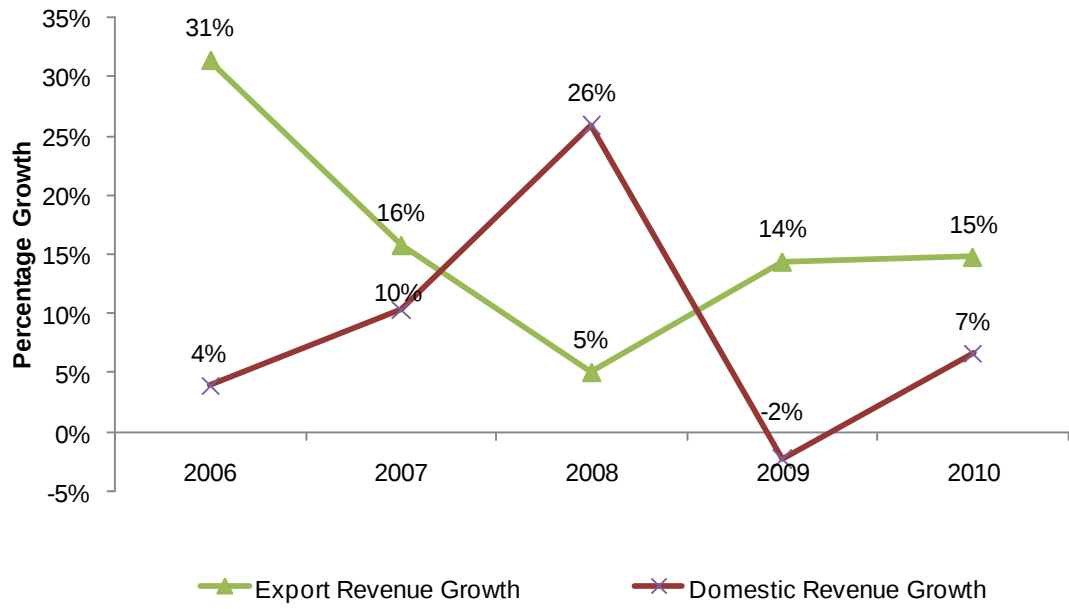
**Chart 2.1: Overall Infocomm Industry Revenue Growth, 2006 – 2010**



**Chart 2.2: Infocomm Domestic/Export Revenue Composition, 2006 – 2010**



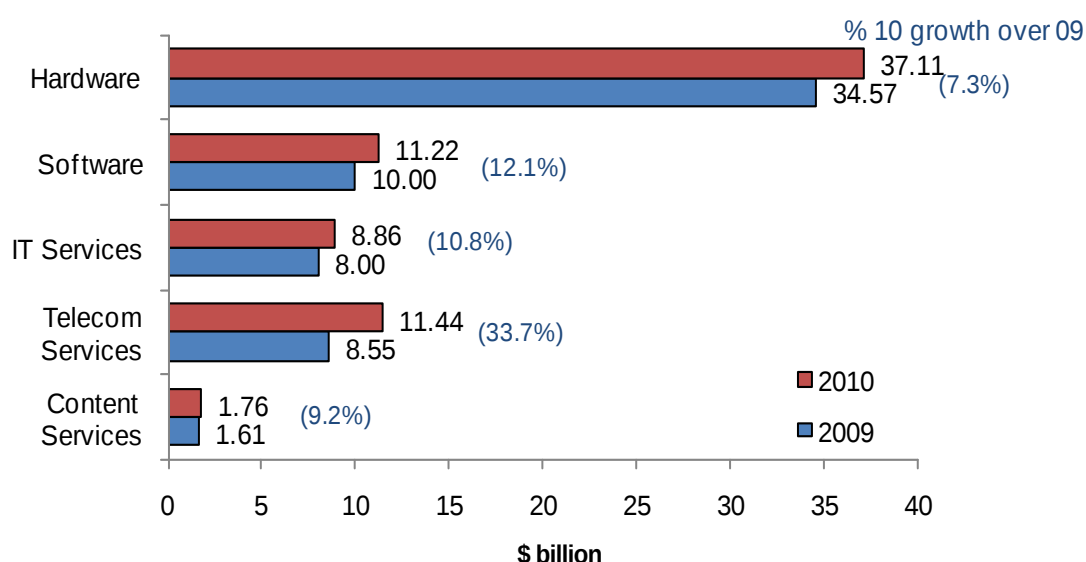
**Chart 2.3: Infocomm Domestic/Export Growth Rate, 2006 – 2010**



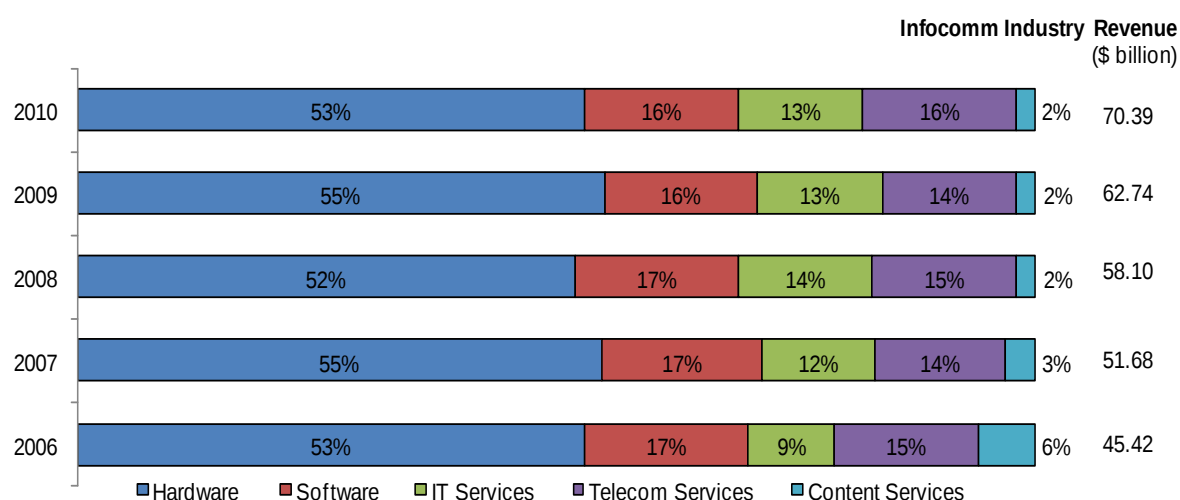
## 2.2. Infocomm Industry Revenue by Market Segment

Among all segments, the *Telecom Services* segment experienced the largest growth of 33.7% in 2010 (Chart 2.4). Though the *Hardware* segment grew marginally, it continued to make up more than half of the infocomm industry revenue (Chart 2.5).

**Chart 2.4: Infocomm Industry Revenue Growth by Market Segment, 2010 over 2009**



**Chart 2.5: Infocomm Industry Revenue by Market Segment, 2006 – 2010**



### 2.3. Infocomm Domestic Revenue by Market Segment

Domestic revenue recovered from the fall in 2009 to reach \$23.76 billion in 2010 (Chart 2.6). With the highest growth rate of 10.9% in 2010, the *Telecom Services* segment continues to be the highest contributor to the infocomm domestic revenue (Chart 2.7).

Chart 2.6: Infocomm Domestic Revenue by Market Segment, 2006 – 2010

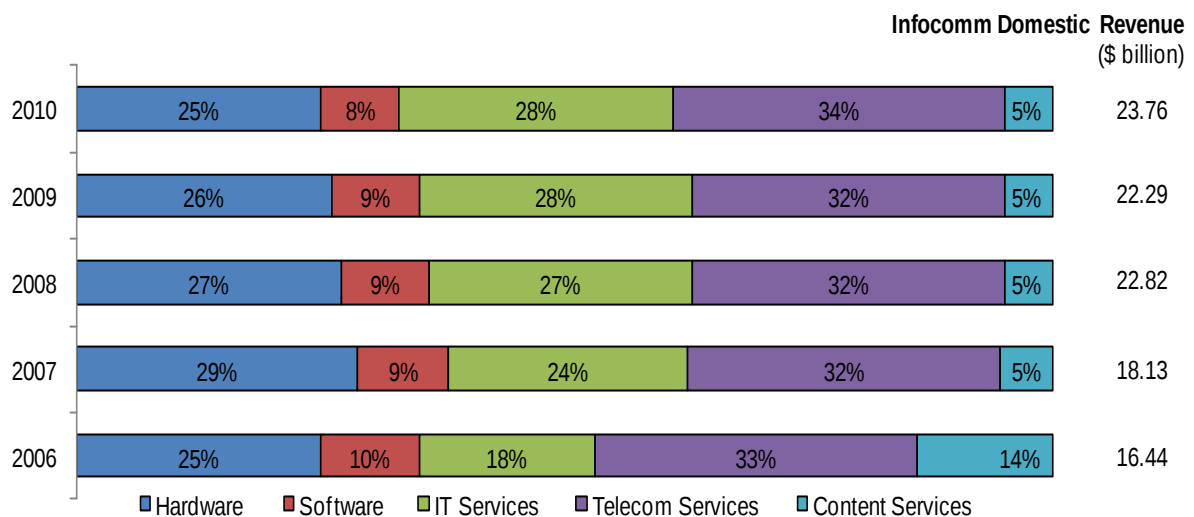
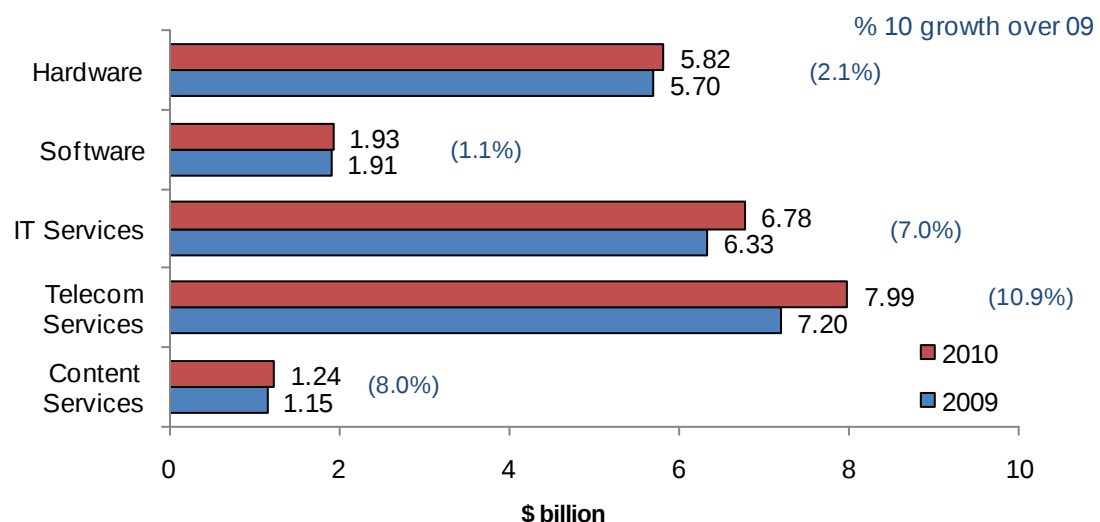


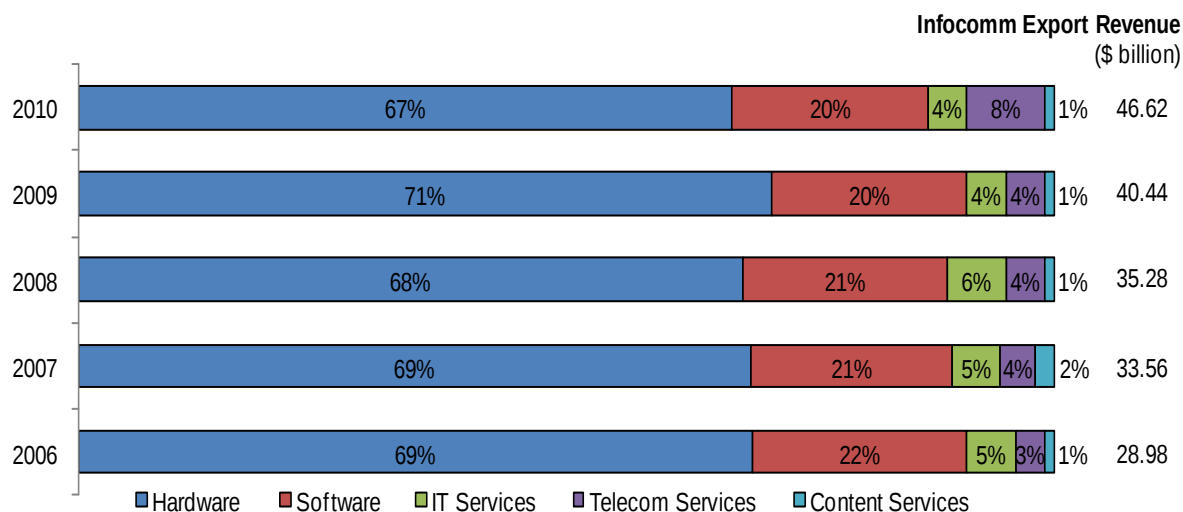
Chart 2.7: Infocomm Domestic Revenue Growth by Market Segment, 2010 over 2009



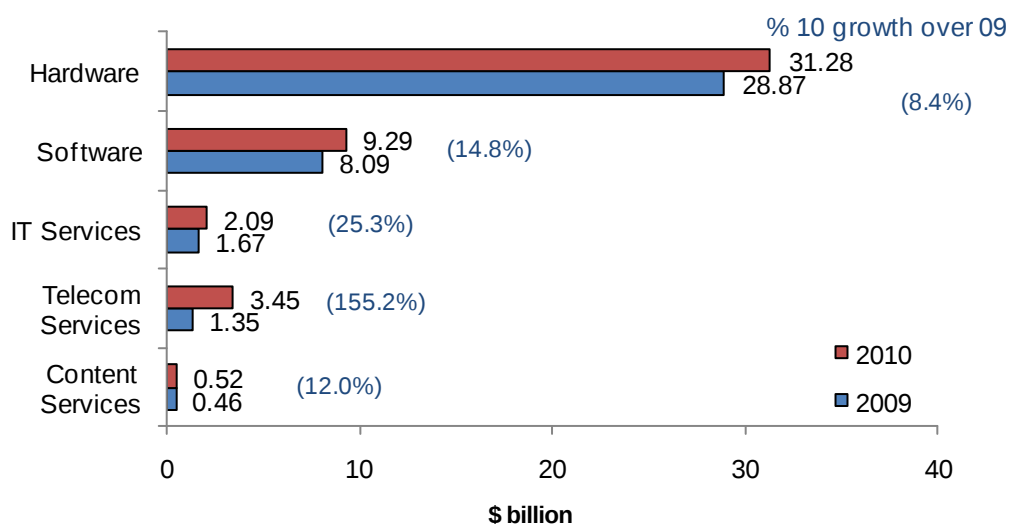
## 2.4. Infocomm Export Revenue by Market Segment

Export revenue continued to grow to reach \$46.62 billion in 2010, with 67% of the revenue coming from the *Hardware* segment ([Chart 2.8](#)). All segments saw positive growth in 2010, with the largest growth experienced by *Telecom Services* ([Chart 2.9](#)).

**Chart 2.8: Infocomm Export Revenue by Market Segment, 2006 – 2010**



**Chart 2.9: Infocomm Export Revenue Growth by Market Segment, 2010 over 2009**

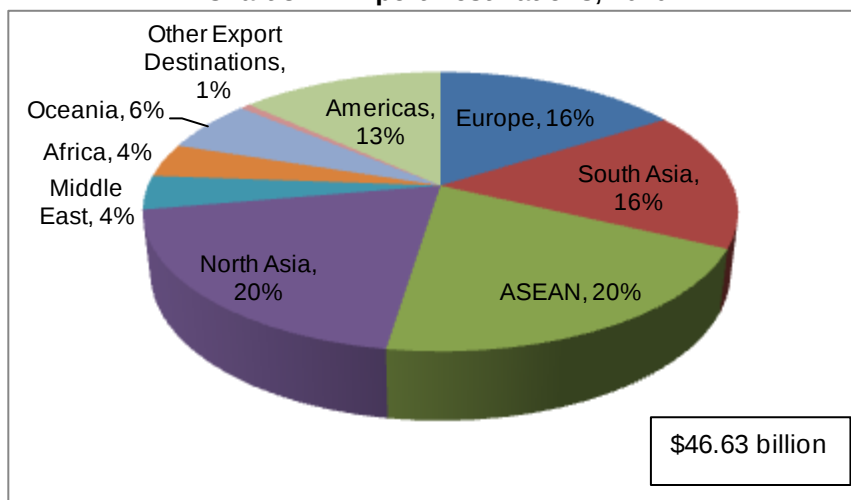


### 3. EXPORT DESTINATIONS

#### 3.1. By Region

In 2010, the top two export destinations by region were ASEAN (20%), and North Asia (20%) ([Chart 3.1](#)).

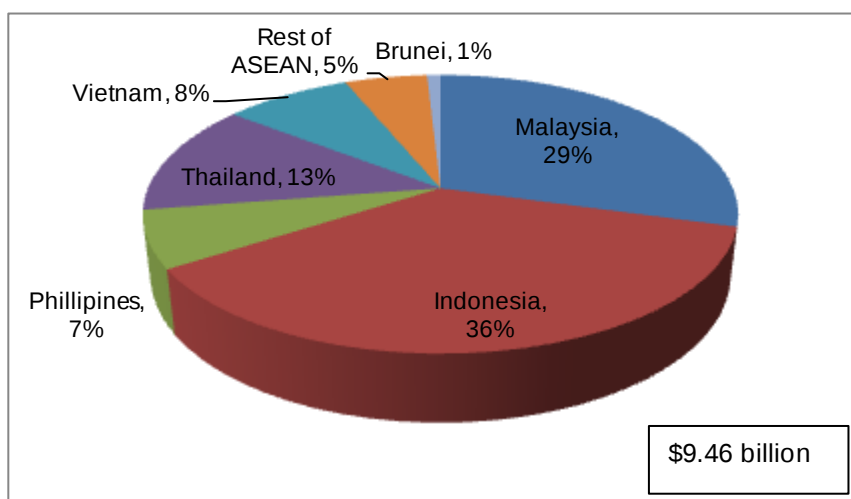
**Chart 3.1: Export Destinations, 2010**



#### 3.2. Exports to ASEAN

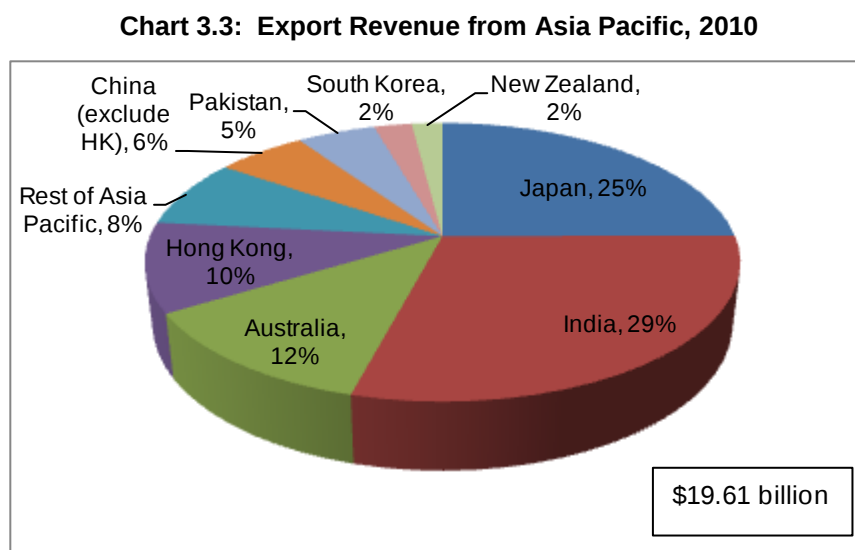
Amongst the ASEAN countries, 65% of the revenue was from exports to Indonesia and Malaysia ([Chart 3.2](#)).

**Chart 3.2: Export Revenue from ASEAN, 2010**



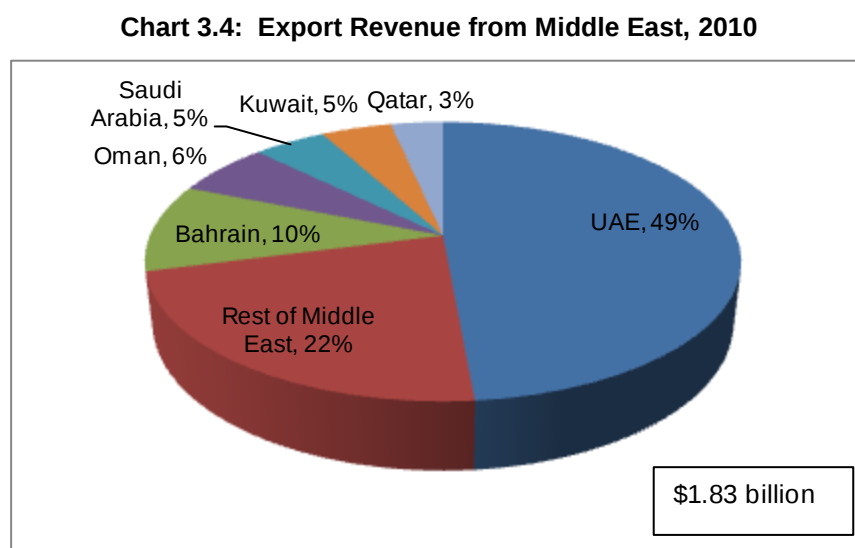
### 3.3. Exports to Asia Pacific<sup>1</sup>

India (29%), Japan (25%) and Australia (12%) were the top three destinations for exports to the Asia Pacific region (Chart 3.3).



### 3.4. Exports to Middle East

The UAE was the top export destination in the Middle East with a 49% share of the export revenue (Chart 3.4).

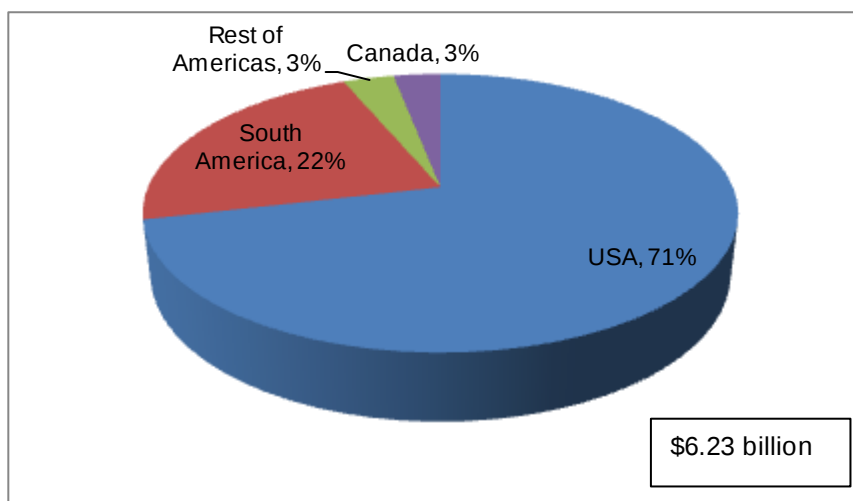


<sup>1</sup> For the purpose of this report, the export revenue to ASEAN is presented separately from Asia Pacific.

### 3.5. Exports to Americas

71% of the exports to the Americas went to USA while 22% of the exports went to South America ([Chart 3.5](#)).

**Chart 3.5: Export Revenue from Americas, 2010**



### 3.6. Exports to Europe

Western Europe and the rest of Europe (i.e. Northern and Southern Europe) were the top contributors to export revenue from Europe with a 35% each ([Chart 3.6](#)).

**Chart 3.6: Export Revenue from Europe, 2010**

