

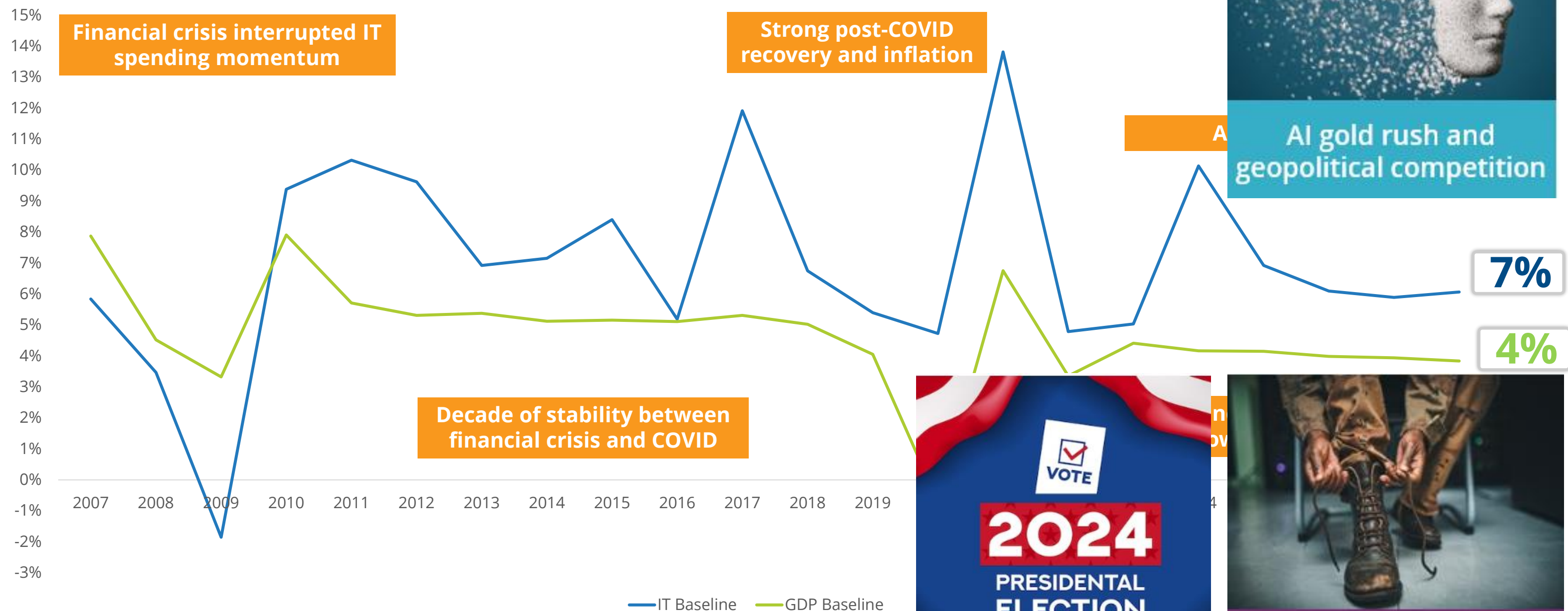
# Mapping 2025-2029 Growth Opportunities in an AI Everywhere Era

Avneesh Saxena  
GVP, Data & Analytics  
8th Nov 2024 | Singapore

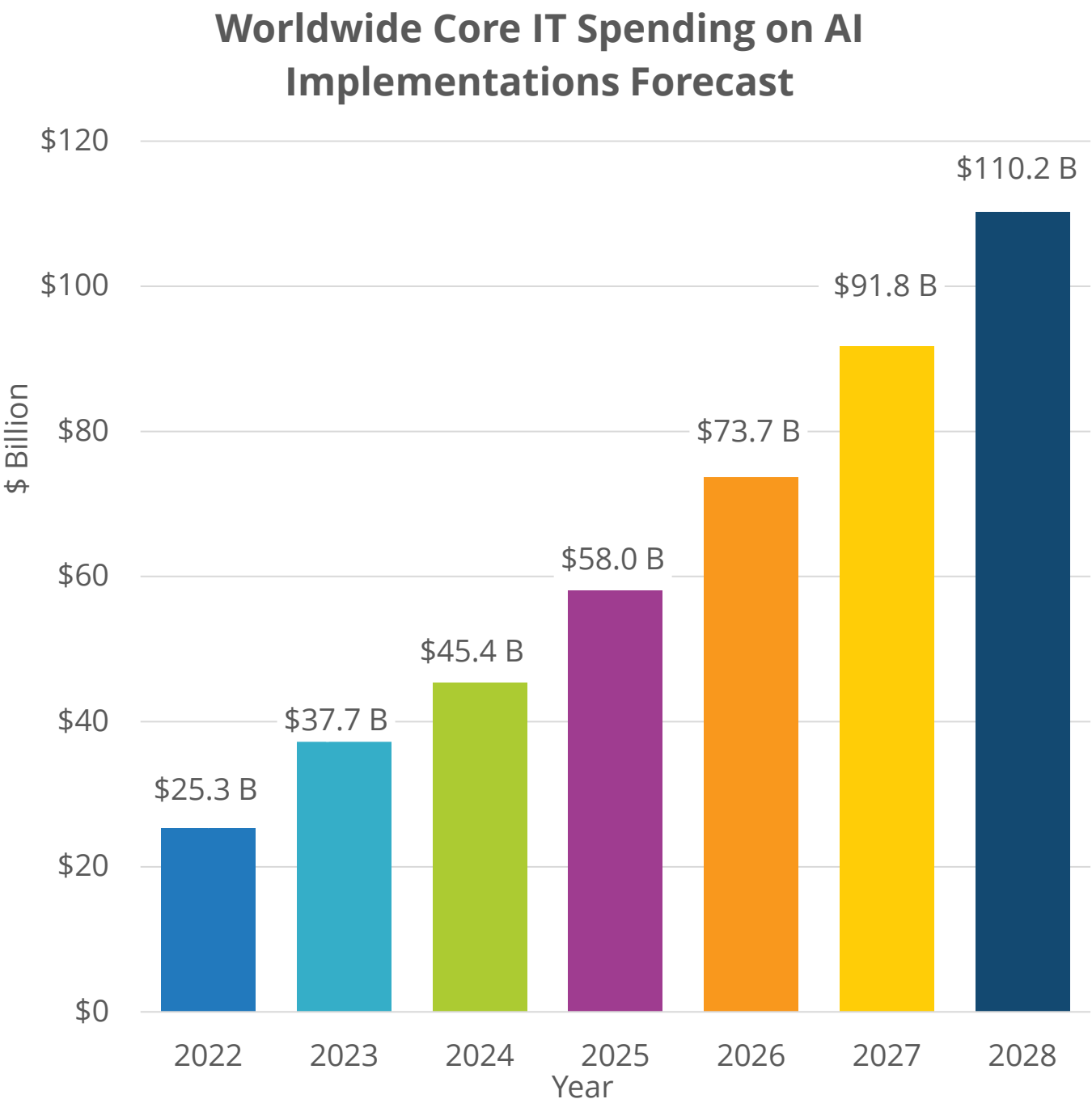




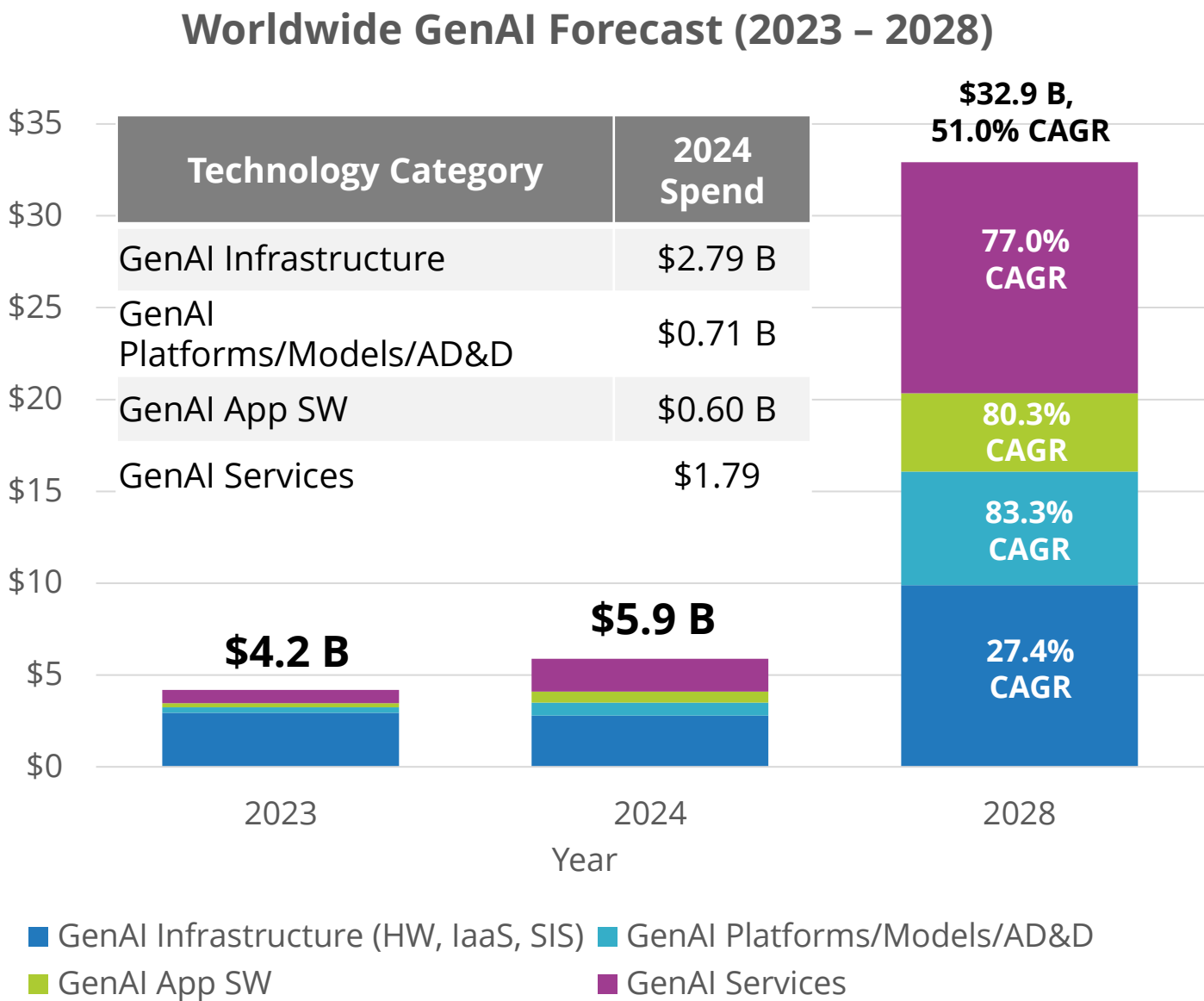
# Asia/Pacific IT Spending to grow 2x times of GDP in 2024



# Asia/Pacific\* AI Spend & Gen AI Will Exceed **\$110B** by 2028: More than Doubling the 2024 Market Size



By 2028, Generative AI Represents 30% of the Broader AI Market



\*Including China and Japan



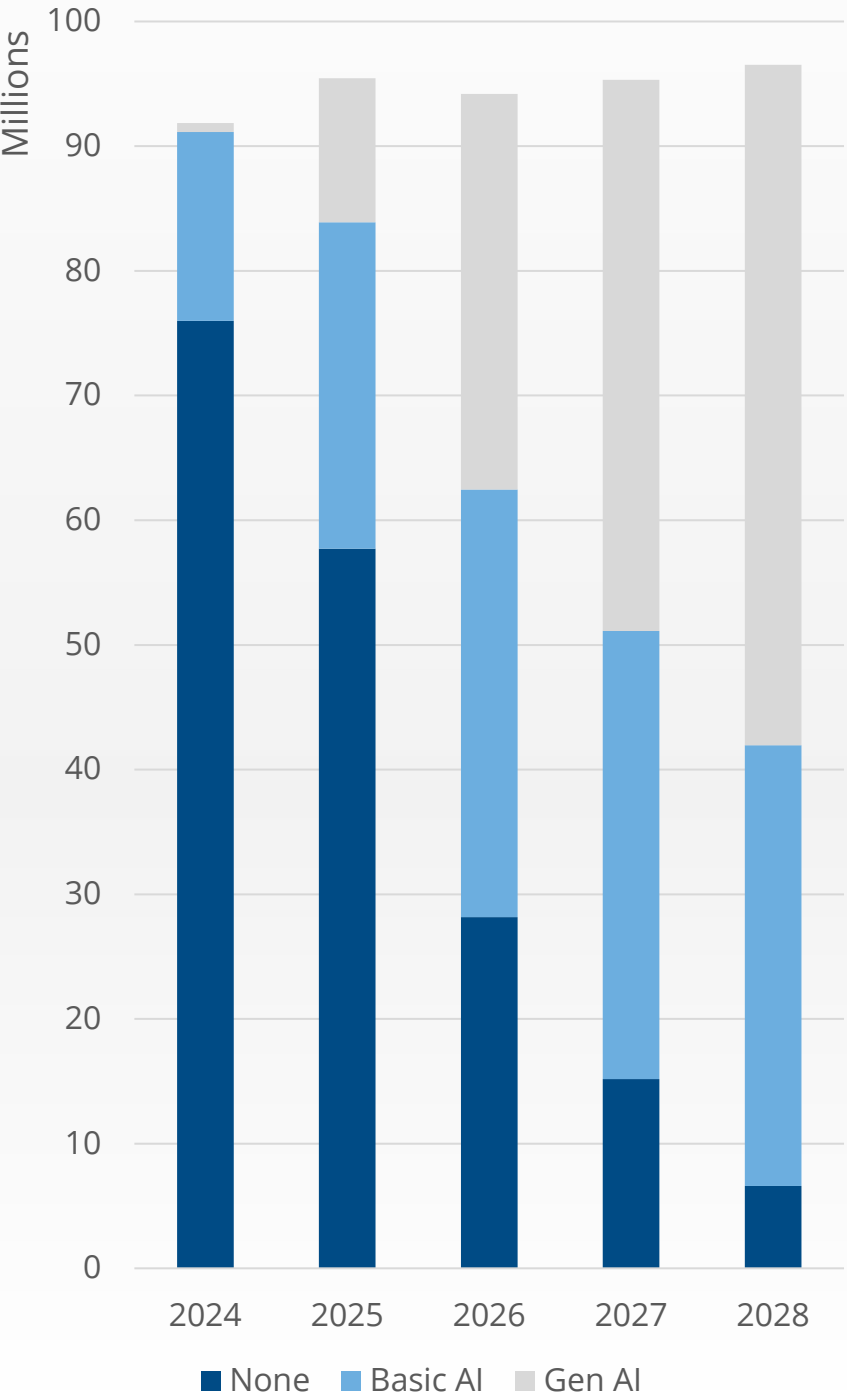


Key Technology  
Inflection Points for AI



# AI at the Edge

## APJ DT+NB PC Shipments by AI Classification, 2024-2028



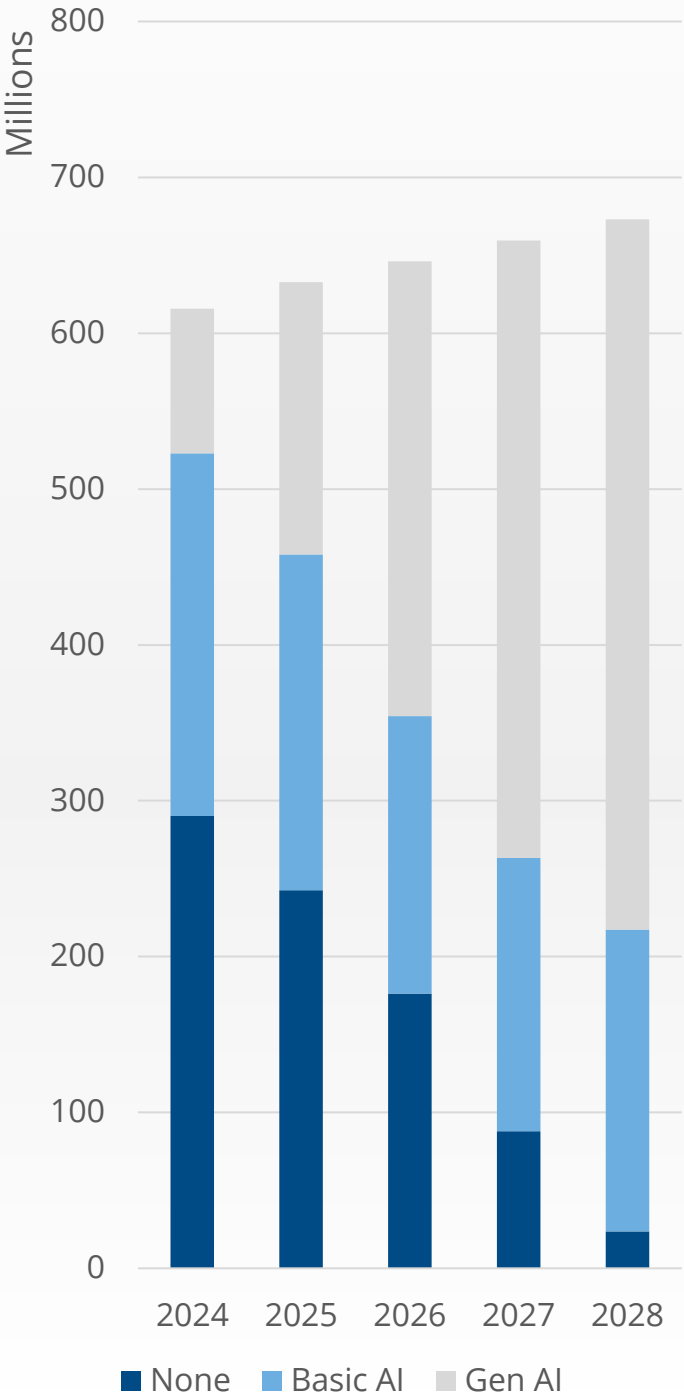
### Use cases

- **Productivity**  
meeting summarization, slide/document creation, coding
- **Media creation**  
images, video, audio
- **Smarter search**  
an improved MS Recall and does it privately

### Leading vendors

- **Silicon providers** like Intel and Qualcomm unlocking
- **Most PC OEMs** on board, including Apple

## APJ Smartphone Shipments by AI Classification, 2024-2028



### Use cases

- **Media creation**  
images, video, audio
- **Productivity**  
meeting summarization
- **Smarter virtual agents**  
a Siri that remembers and does it privately

### Leading vendors

- **Silicon providers** like Qualcomm and Mediatek unlocking
- **Most phone OEMs** on board, including Apple

# Enterprises keen to upgrade to AI PC but consumers may wait longer

## Enterprises keen to upgrade to AI PC, but consumers may wait longer

**48.6%** considers AI PC capabilities as “very important” to their purchase criteria

**35.8%** plan to upgrade majority of their PCs for AI in 12 months



## Consumers are looking at AI PCs too, but not right away

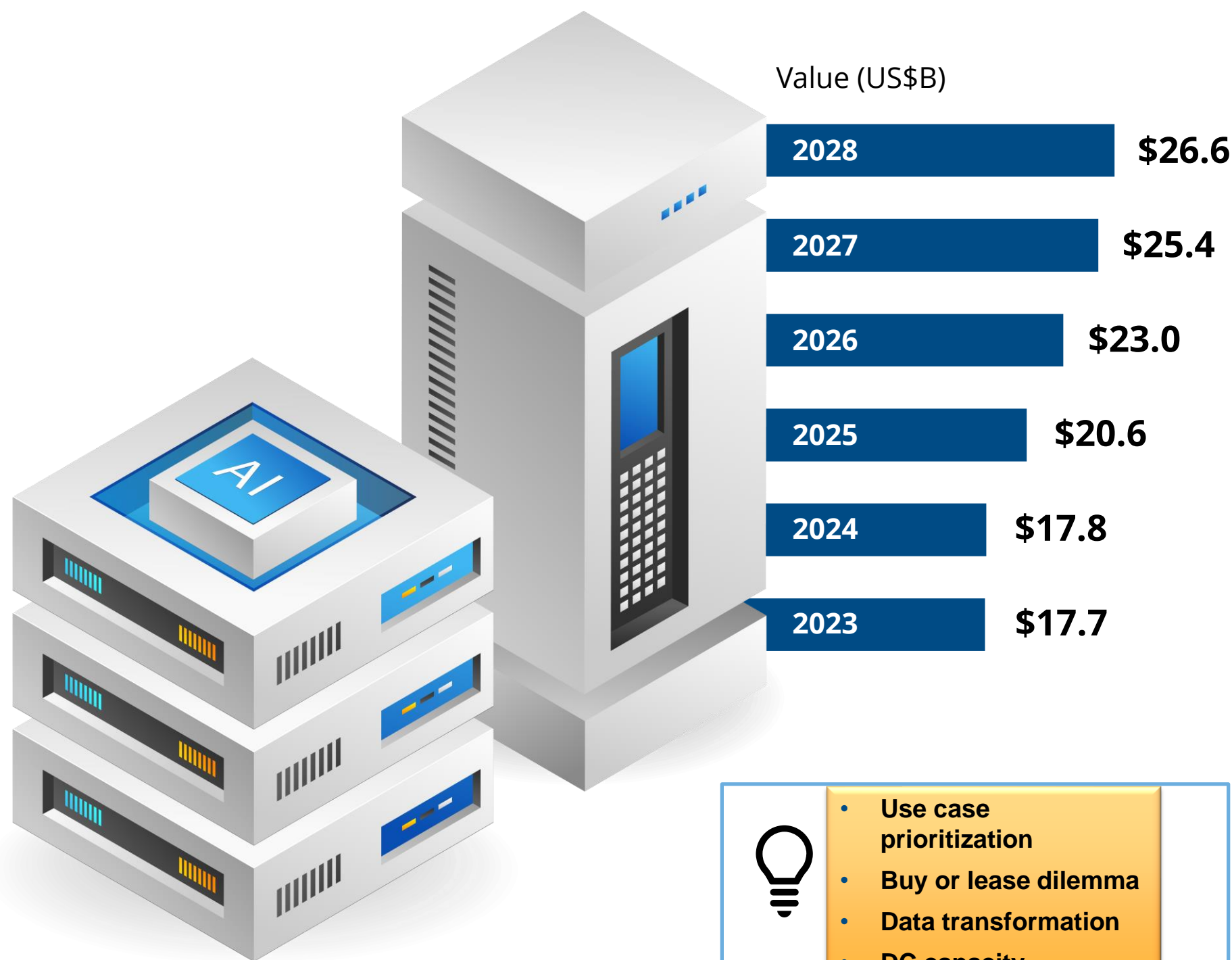
**40%** considers AI PC capabilities as “moderately/slightly important” to their purchase criteria

Majority (**almost 40%**) says they are not sure when they are most likely to purchase the next-gen PCs once launched.

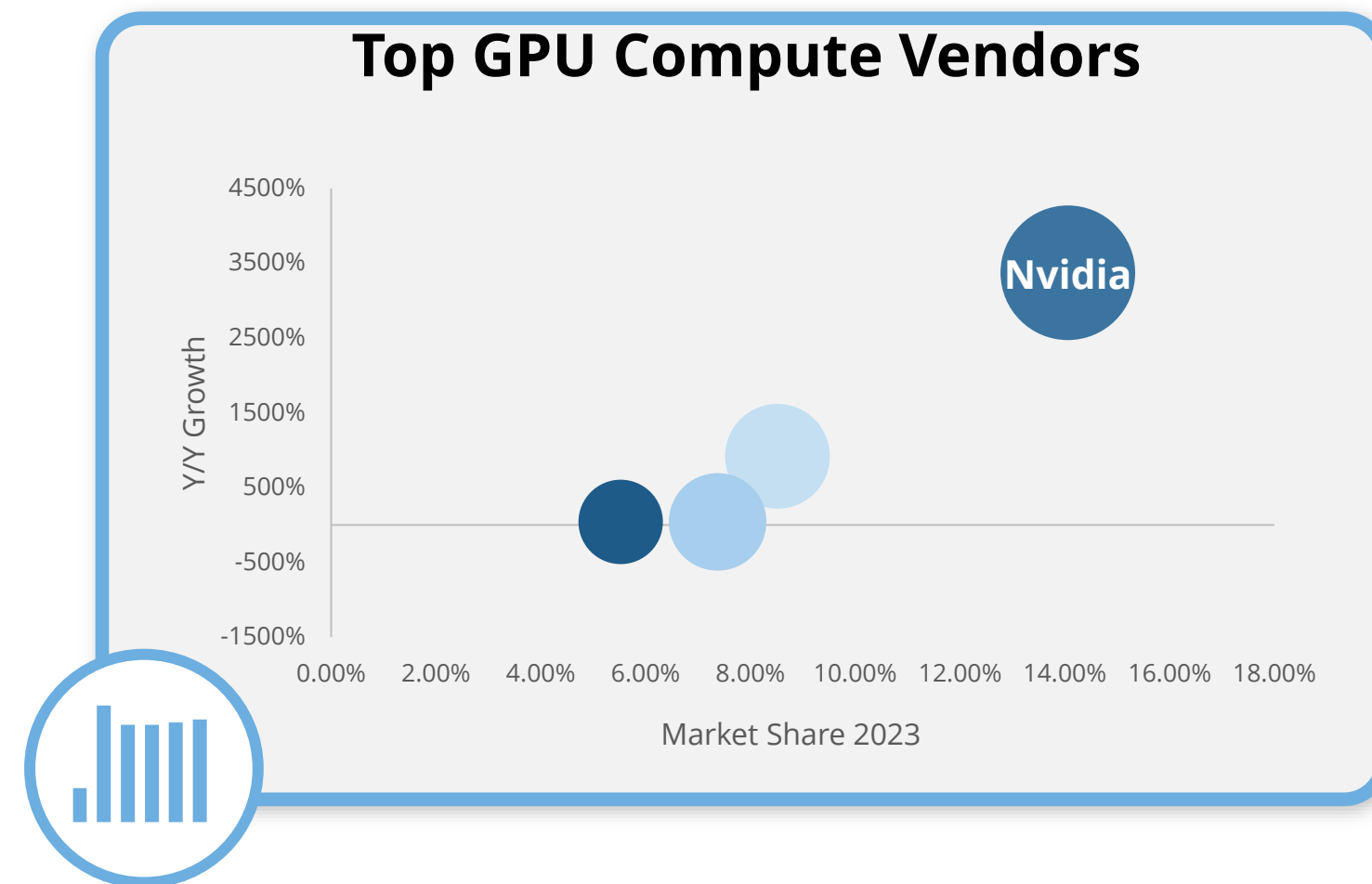


**Need more Killer AI Apps to drive demand**

# AI Infrastructure Growth led by SPs



- Use case prioritization
- Buy or lease dilemma
- Data transformation
- DC capacity



**Bloomberg**

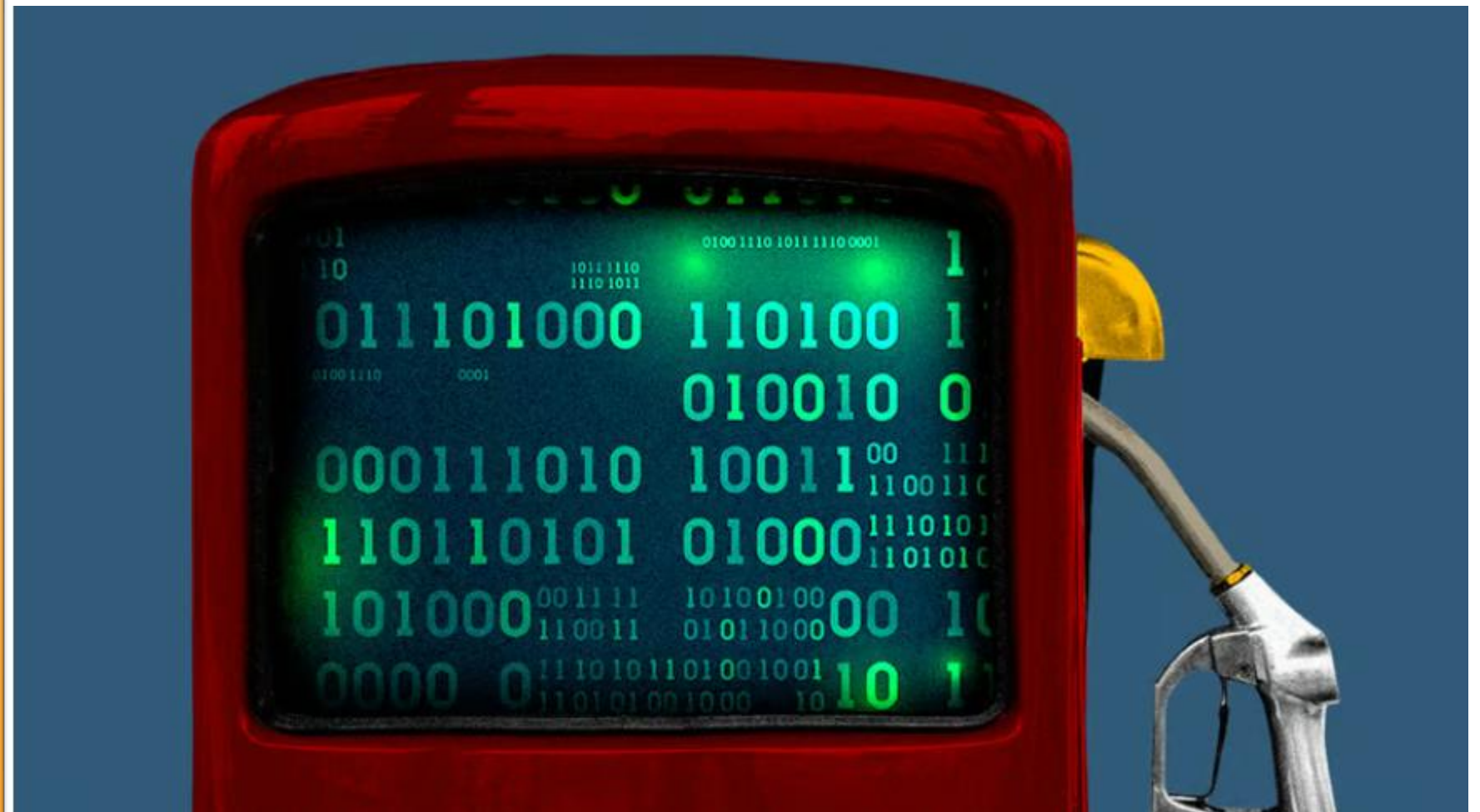
## TSMC Shares Reach Record High After AI Boom Brightens Forecast

- The chipmaker boosts its target for 2024 revenue growth
- Net income soared 54% in better-than-expected results

# The Energy Dilemma

Electricity consumption from data centres, artificial intelligence (AI) and the cryptocurrency sector could **double by 2026**. Data centres are significant drivers of growth in electricity demand in many regions. After globally consuming an estimated 460 terawatt-hours (TWh) in 2022, data centres' total electricity consumption could reach more than 1000 TWh in 2026. – *Source - IEA Executive Summary 2024*

- **Balancing the clean energy scorecard**
- **Sustainability – being “Cooler” despite increasing power density**  
Using SLMs, consolidating training on fewer sites, Liquid Cooling racks with more than 60KW density



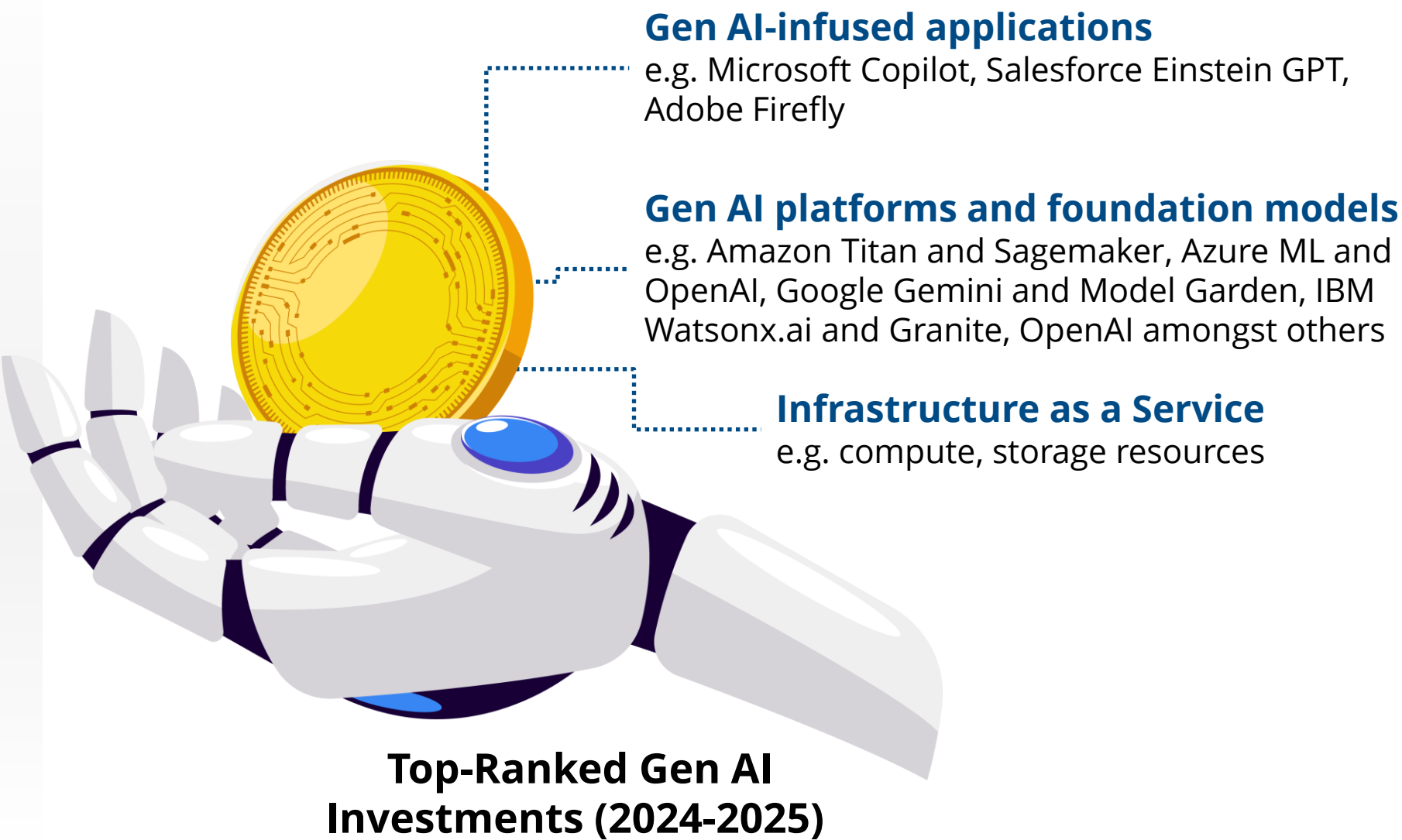
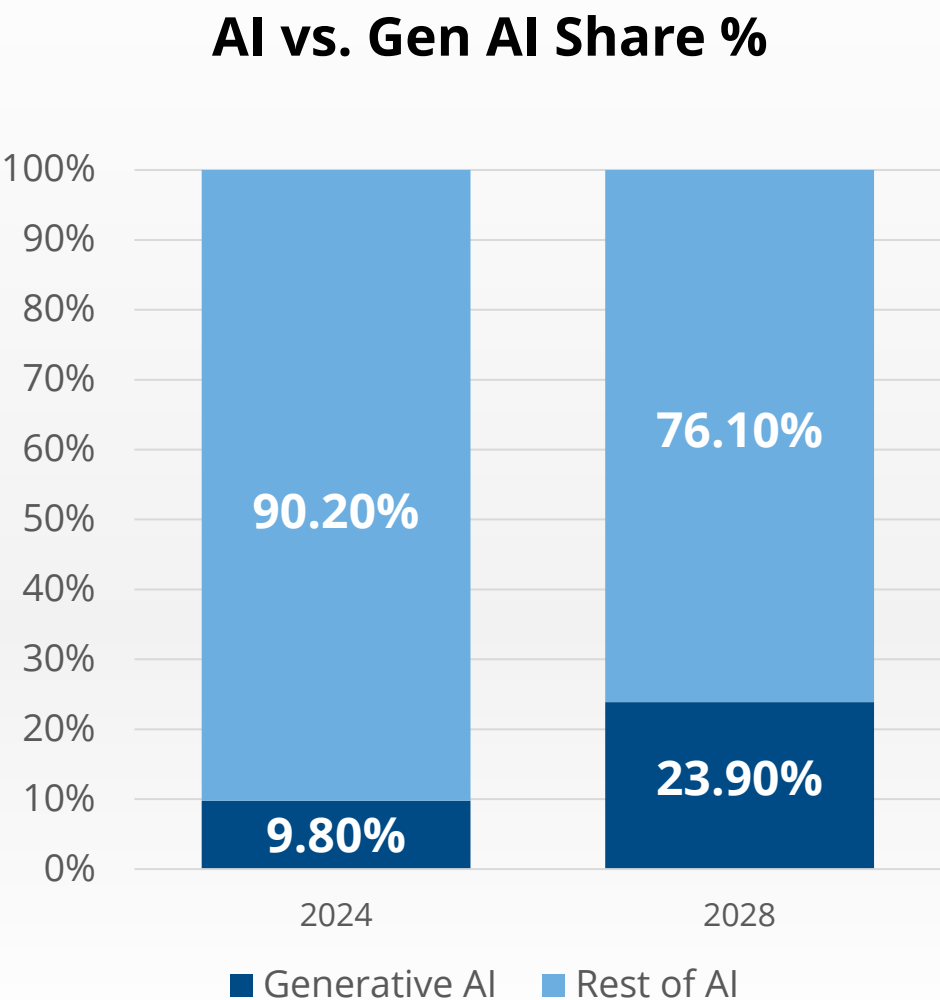
Source: The Economist



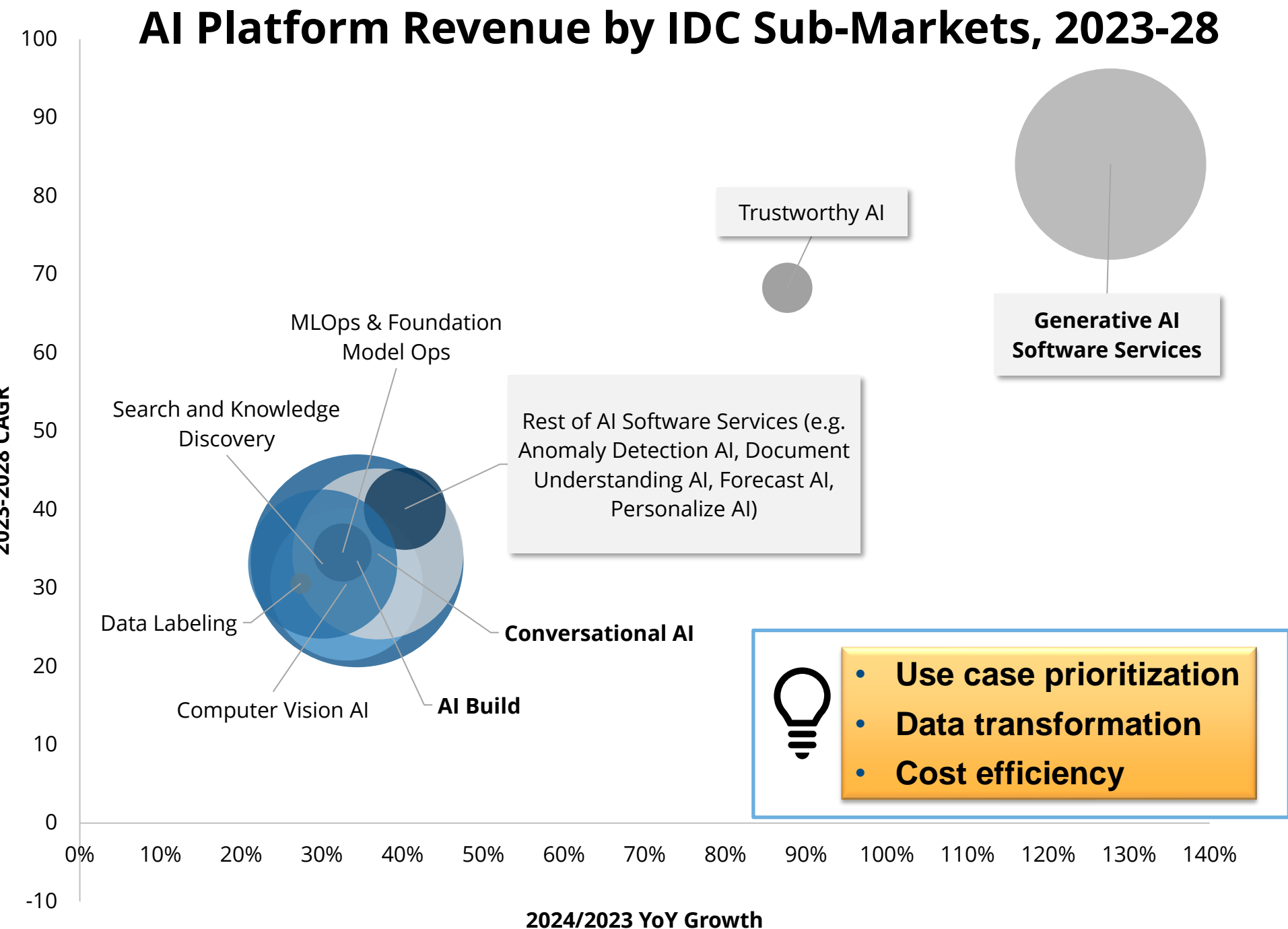
# APJ Gen AI Spend on Software to grow at 79.7% CAGR (2023-2028) to Reach \$45.2 billion by 2028



APJ is taking a mid-to-long term view on AI platform purchasing decisions. Those who can support organizations in developing and managing their own Gen AI models and applications will be distinguished.



Each market offers scalable and efficient tools that accelerate AI adoption without burden of developing in-house solutions or specialized resources.



### Top use cases (by size in 2024)

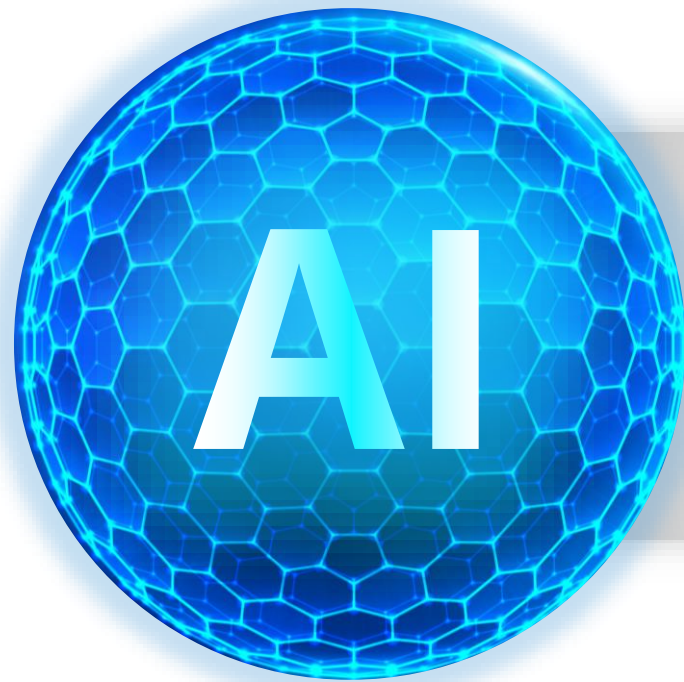
**Augmented Fraud Analysis and Investigation**  
(associated markets: Anomaly Detection AI, Trustworthy AI Software, MLOps, Data Labeling, Predictive Analytics)

**Augmented Threat Intelligence and Prevention**  
(associated markets: Anomaly Detection AI, Trustworthy AI Software, AI-Enabled Security Software, MLOps, Forecast AI)

**AI-enabled Customer Service and Self Service**  
(associated markets: Generative AI Software, Text and Audio AI, Personalize AI, Trustworthy AI Software)



# The Global AI Economic Impact



Cumulative **Global Economic Impact** of  
**\$19.9 Trillion by 2030.**  
3.5% of global GDP in 2030

Increased **spending on AI solutions and services** driven by accelerated AI adoption

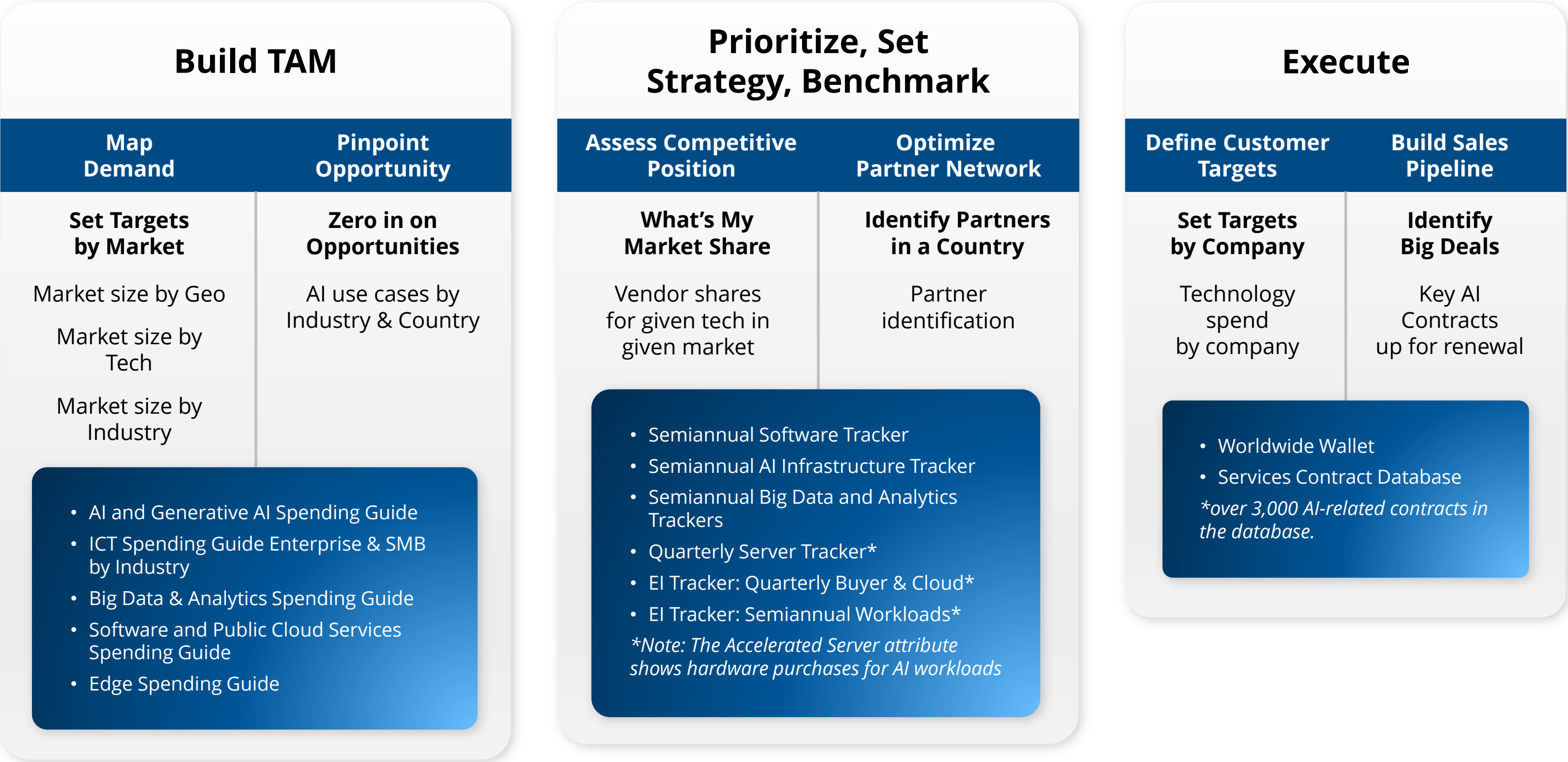
Economic **stimulus among AI adopters**, seeing benefits in terms of increased production and new revenue streams

Impact along the whole **AI providers supply chain**, increasing revenue for the providers of essential supplies to AI solutions and services providers



**In 2030, every new dollar spent in AI solutions and services by AI adopters will generate \$4.6 into the economy, in terms of indirect and induced effects.**

# IDC Helping Navigate your AI Opportunities







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