

'93년도 전자산업 경기전망 세미나

'93 세계전자시장 전망

손종형 / 데이터 퀘스트한국지사장

1. '93 세계전자시장 전망

1) 지역별 전자기기 시장

(\$ B)

지 역 별	1991	1992	1993	1994	1995	CAGR(%)
North America	215.3	221.9	231.7	243.5	254.9	4.3
Japan	176.2	173.2	183.8	192.7	201.4	3.4
Europe	163.0	170.6	185.7	197.0	209.0	6.4
A/P & ROW	84.0	98.4	112.1	125.4	140.0	13.6
Total	638.5	664.1	713.3	758.6	805.3	6.0

(% Growth)

지 역 별	1991	1992	1993	1994	1995	CAGR(%)
North America	(4.9)	3.1	4.4	5.1	4.7	2.5
Japan	10.1	(1.7)	6.1	4.8	4.5	4.8
Europe	1.2	4.7	8.9	6.1	6.1	5.4
A/P & ROW	13.1	17.1	13.9	11.9	11.6	13.5
Total	2.7	4.0	7.4	6.4	6.2	5.3

2) 산업별 전자기기 시장

(\$ B)

산 업 별	1991	1992	1993	1994	1995	CAGR(%)
Data Processing	186.2	196.8	208.3	221.0	233.5	5.8
Communication	101.3	107.5	116.8	124.6	134.8	7.4
Industrial	102.5	104.9	113.1	121.2	128.4	5.8
Consumer	144.5	149.2	163.8	175.7	187.6	6.7
Military/Aerospace	82.0	82.3	85.6	88.5	91.0	2.6
Transportation	22.0	23.4	25.7	27.6	29.7	7.8
Total	638.5	664.1	713.3	758.6	805.3	6.0

(% Growth)

산 업 별	1991	1992	1993	1994	1995	CAGR(%)
Data Processing	(1.5)	5.7	5.8	6.1	5.7	4.4
Communication	7.3	6.1	8.7	6.7	8.2	7.4
Industrial	3.3	2.3	7.8	7.2	5.9	5.3
Consumer	10.0	3.3	9.8	7.3	6.8	7.4
Military/Aerospace	5.5	0.4	4.0	3.4	2.8	3.2
Transportation	4.3	6.4	9.8	7.4	7.6	7.1
Total	2.7	4.0	7.4	6.4	5.1	5.3

Source : Dataquest

3) 전자기기시장 요약

(\$ B)

지 역	산 업	1989	1990	1991	1992	1993	1994	1995	1996
N.A.	Data Processing	77.5	81.2	73.7	75.9	78.3	82.4	85.6	90.3
	Communication	28.4	29.9	31.8	34.0	36.4	38.9	41.5	43.9
	Industrial	32.3	33.7	33.9	35.5	38.0	40.5	43.4	46.5
	Consumer	17.1	17.0	16.7	17.3	18.2	19.2	20.2	21.1
	Military/Aerospace	59.9	60.6	55.3	54.9	56.1	57.5	58.9	60.1
	Transportation	4.2	4.1	3.9	4.3	4.7	5.0	5.3	5.5
	Total	219.4	226.5	215.3	221.9	231.7	243.5	254.9	267.4
Japan	Data Processing	47.9	46.8	51.3	51.2	53.6	55.8	57.8	60.5
	Communication	19.8	21.3	22.9	23.3	24.5	25.7	26.9	28.3
	Industrial	24.9	26.4	28.7	27.6	29.8	32.3	34.6	37.4
	Consumer	52.5	54.4	61.8	59.6	63.8	66.3	69.1	72.8
	Military/Aerospace	1.8	1.6	1.6	1.6	1.6	1.6	1.6	1.6
	Transportation	9.2	9.5	9.9	9.9	10.5	11.0	11.4	11.8
	Total	156.1	160.0	176.2	173.2	183.8	192.7	201.4	212.4
Europe	Data Processing	31.2	33.6	30.4	31.9	34.7	36.7	38.9	41.3
	Communication	27.4	32.7	35.1	37.0	40.4	42.4	46.4	48.5
	Industrial	31.1	36.0	36.4	37.8	40.9	43.4	45.3	47.6
	Consumer	30.8	32.2	33.8	35.7	39.2	42.3	44.7	48.0
	Military/Aerospace	21.7	21.0	21.2	21.5	22.9	23.9	24.5	25.3
	Transportation	4.6	5.6	6.1	6.7	7.6	8.3	9.2	10.2
	Total	146.8	161.1	163.0	170.6	185.7	197.0	209.0	220.9
A/P & Row	Data Processing	25.0	27.4	30.8	37.8	41.7	46.1	51.2	57.1
	Communication	8.9	10.5	11.5	13.2	15.5	17.6	20.0	22.8
	Industrial	2.7	3.1	3.5	4.0	4.4	5.0	5.4	6.1
	Consumer	23.9	27.8	32.2	36.6	42.6	47.9	53.6	60.0
	Military/Aerospace	3.3	3.6	3.9	4.3	5.0	5.5	6.0	6.5
	Transportation	1.6	1.9	2.1	2.5	2.9	3.3	3.8	4.2
	Total	65.4	74.3	84.0	98.4	112.1	125.4	140.0	156.7
WW	Data Processing	181.6	189.0	186.2	196.8	208.3	221.0	233.5	249.2
	Communication	84.5	94.4	101.3	107.5	116.8	124.6	134.8	143.5
	Industrial	91.0	99.2	102.5	104.9	113.1	121.2	128.7	137.6
	Consumer	124.3	131.4	144.5	149.2	163.8	175.7	187.6	201.9
	Military/Aerospace	86.7	86.8	82.0	82.3	85.6	88.5	91.0	93.5
	Transportation	19.6	21.1	22.0	23.4	25.7	27.6	29.7	31.7
	Total	587.7	621.9	638.5	664.1	713.3	758.6	805.3	857.4

Source : Dataquest

2. 세계 주요 경쟁국들의 GNP/GDP 성장률('91~'95)

(단위 : %, 성장율)

	1991	1992	1993	1994	1995	CAGR (%)
USA	(0.7)	1.7	2.6	2.3	2.4	1.7
Canada	(1.7)	1.9	4.0	3.4	3.0	2.1
Japan	4.4	2.0	3.3	3.5	4.0	3.4
France	0.9	2.1	2.7	3.3	3.3	2.5
Germany	3.2	1.1	2.6	4.2	3.8	3.0
Italy	1.4	1.2	1.5	2.0	2.4	1.7
UK	(2.4)	(1.0)	1.3	2.0	3.0	0.6
Other OECD	0.6	1.7	2.6	N/A	N/A	1.6
OECD Average	1.0	1.8	3.0	N/A	N/A	1.9
Korea	8.4	7.0	7.0	7.0	7.0	7.3
Taiwan	7.3	7.0	7.0	7.0	7.0	7.1
HK	4.2	5.5	5.5	5.0	5.0	5.0
Singapore	6.7	6.0	6.5	6.5	6.5	6.4
Unemployment OECD	7.1	7.5	7.3	N/A	N/A	7.3

Source : Dun & Bradstreet Corp.

3. 산업별 전자시장 전망

1) 데이터 처리기기 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Computer	109,310	115,923	142,776	6.0	6.9
Super Computer	2,237	2,516	3,600	12.5	12.6
Mainframe	25,968	25,029	22,700	(3.6)	(3.3)
Midrange	25,382	25,538	26,270	0.6	0.9
Workstation	9,812	13,887	33,513	41.5	35.9
PC	45,911	48,953	56,693	6.6	5.4
Data Storage	24,171	24,379	25,350	0.9	1.2
FDD	1,844	1,912	2,042	3.7	2.6
HDD	19,392	19,287	19,788	(0.5)	0.5
ODD	747	966	1,221	29.2	13.1
Tape Drive	2,188	2,214	2,299	1.2	1.2
Terminal	17,293	18,377	22,238	6.3	6.5
I/O Device	28,009	30,091	35,816	7.4	6.3
Dedicated System	20,810	22,248	26,241	6.9	6.0
Total	199,593	211,018	252,421	19.6	6.0

Source : Dataquest

2) 통신기기 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Permise Telecom Equipment	42,624	46,073	54,588	8.1	6.4
Public Telecom Equipment	32,842	35,874	43,052	9.2	7.0
Mobile Communication Equipment	18,197	19,961	28,046	9.7	11.4
Broadcst & Radio	4,492	5,019	6,487	11.7	9.6
Other Telecom	9,360	9,967	11,282	6.5	4.8
Total	107,515	116,894	143,455	8.7	7.5

Source : Dataquest

3) 산업용기기 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Security/Energy Management	13,922	15,512	20,874	11.4	10.7
Manufacturing System & Instrumentation	62,854	67,338	80,745	7.1	6.5
Medical	15,599	16,887	20,616	8.3	7.2
Other Industrial System	12,528	13,382	15,251	6.8	5.0
Total	104,903	113,119	137,486	7.8	7.0

Source : Dataquest

4) 가정용기기 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Audio	21,098	23,483	31,124	11.3	10.2
Video	47,053	51,184	63,545	8.8	7.8
Personal Electronics	18,960	20,859	24,493	10.0	6.6
Appliance	52,247	57,162	69,871	9.4	7.5
Other Consumer	9,851	11,114	12,944	12.8	7.1
Total	149,218	163,802	201,977	9.8	7.9

Source : Dataquest

5) 군수/민간 항공장비 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Military Aerospace	64,752	65,504	65,021	1.2	0.1
Civil Aerospace	17,614	20,060	28,494	13.9	12.8
Total	82,366	85,564	93,515	3.9	3.2

Source : Dataquest

6) 수송장비 시장

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Entertainment	2,353	2,441	2,732	3.8	3.8
Vehicle Controls	3,104	4,034	6,045	30.0	18.1
Body Controls	450	465	679	3.5	10.8
Driver Information	3,894	4,100	4,699	5.3	4.8
Powertrain	9,905	10,340	11,612	4.4	4.1
Safety and Convenience	3,614	4,313	5,959	19.3	13.3
Total	23,319	25,693	31,725	10.2	8.0

Source : Dataquest

4. 주요 전자시장 동향분석

1) 컴퓨터 시스템

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Super Computer	2,237	2,516	3,600	12.5	12.6
Mainframe	25,968	25,029	22,700	(3.6)	(3.3)
Midrange	25,382	25,538	26,270	0.6	0.9
Workstation	9,812	13,887	33,513	41.5	35.9
PC	45,911	48,953	56,693	6.6	5.4
Total	109,310	115,923	142,776	6.0	6.9

Source : Dataquest

2) 워크 스테이션 스테이션

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Super Computer	867	901	1,058	3.9	5.1
Traditional Workstation	5,525	7,272	9,086	31.6	13.2
Entry-Level Workstation	3,418	3,964	9,970	16.0	38.7
Personal Workstation	2	1,570	13,400	78,400.0	804.7
Total	9,812	13,707	33,514	39.7	35.9

Source : Dataquest

3) Personal Computer-Product Mix

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Transportable	180	101	26	(43.9)	(38.4)
Laptop AC	210	103	48	(51.0)	(30.9)
Laptop DC	5,256	5,513	5,965	4.9	3.2
Notebook	2,857	4,369	10,410	52.9	38.2
Pen-Based	268	1,917	11,978	615.3	158.6
Hand-Held	254	653	2,083	157.1	69.2
Desktop	32,078	30,334	19,030	(5.4)	(12.2)
Deskside	5,077	5,964	7,152	17.5	8.9
Total	46,180	48,954	56,692	15.8	11.3

Source : Dataquest

4) Personal Computer-Market Mix by Processor

(단위 : PCS, %)

품목명	1992	1993	1996	92-93	92-96
8088/8086	1,033	1,307	805	26.5	(6.0)
80286	1,259	452	0	(64.1)	(100.0)
80386 SX/SL	8,894	7,519	8,155	(15.5)	(2.1)
80386 DX	5,154	3,526	560	(31.6)	(42.6)
80486 SX/SL	2,917	8,665	21,065	197.1	63.9
80486 DX/DX2	2,700	3,125	5,184	15.7	17.7
80586(P5)	5	350	2,001	6,900.0	347.3
68XXX	4,332	4,730	4,830	9.2	2.8
Others	416	162	49	(61.1)	(41.4)
Total	26,710	29,836	42,649	11.7	12.4

Source : Dataquest

5) Disk Drive

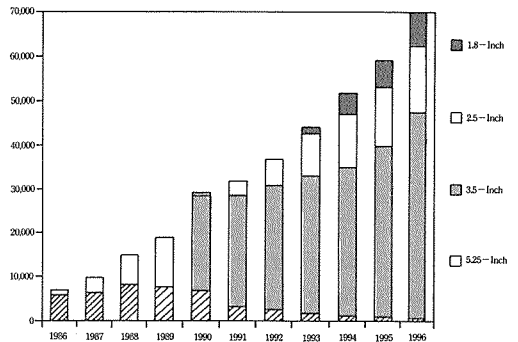
(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Hard	19,392	19,287	19,788	(0.5)	0.5
Optical	747	966	1,221	29.2	13.1
Floppy	1,844	1,912	2,042	3.7	2.6
Tape Drive	2,188	2,214	2,299	1.2	1.2
Total	24,171	24,379	25,350	0.9	1.2

Source : Dataquest

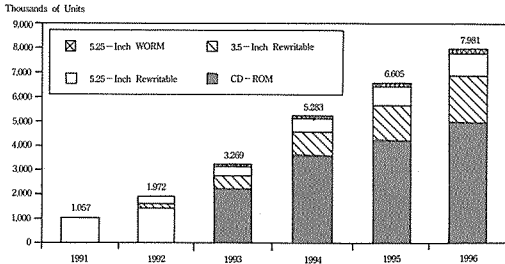
6) Hard Disk

Thousands of Units



Source : Dataquest (September 1992)

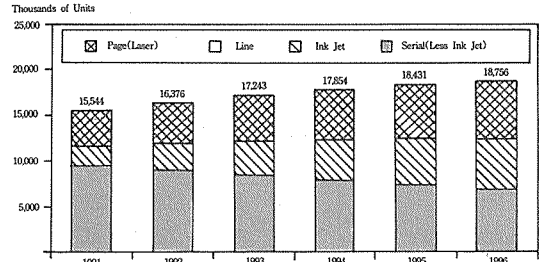
7) Optical Disk



Source : Dataquest(October 1992)

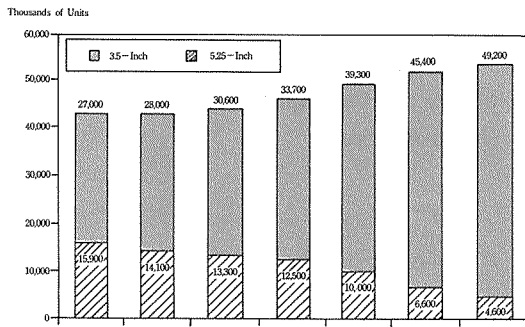
10) Printer

North America and Europe Printer Market Forecast



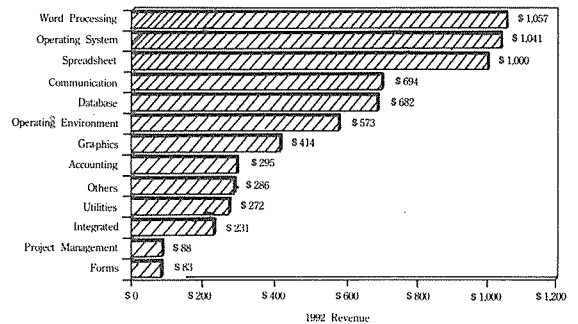
Source : Dataquest(October 1992)

8) FloPy Disk

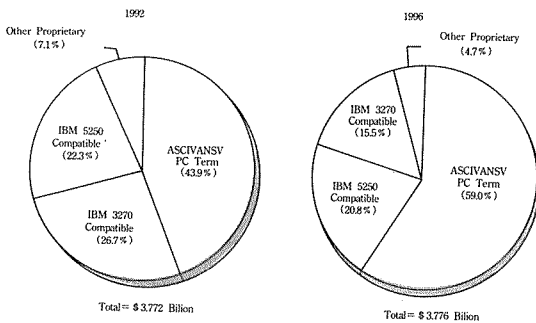


Source : Dataquest(September 1992)

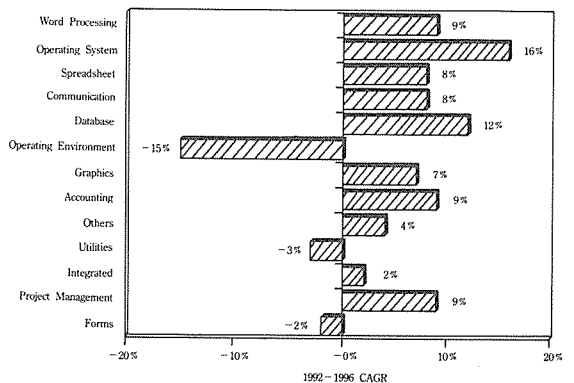
11) PC SOFTWARE—Application Trends (\$ M)



9) Display Terminal



Source : Dataquest(September 1992)



Source : Dataquest(August 1992)

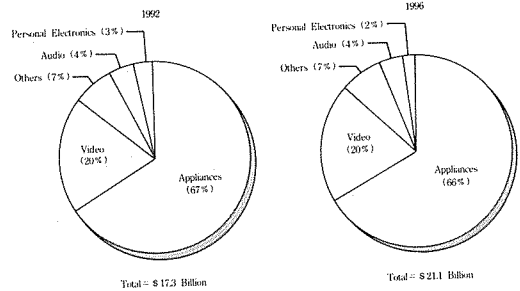
12) Multimedia-Market

(단위 : 백만불, %)

품목명	1992	1993	1996	92-93	92-96
Complete Systems	341.0	1,255.9	3,644.2	268.3	80.8
Software	160.6	304.2	614.0	89.4	39.8
Multimedia PC & Workstation	1,059.0	3,886.0	5,651.0	266.9	52.0
Network	37.0	175.0	1,318.0	373.0	144.3
System Upgrade	268.0	413.0	268.0	54.1	0.0
Peripherals	0.5	0.7	1.2	37.4	23.1
CD Rom Drive	260.0	482.0	715.0	85.4	28.8
Sound Board	171.0	304.0	561.0	77.8	34.6
Video Board	315.0	460.0	960.0	46.0	32.1
Total	2,612.1	7,280.8	13,732.4	178.7	51.4

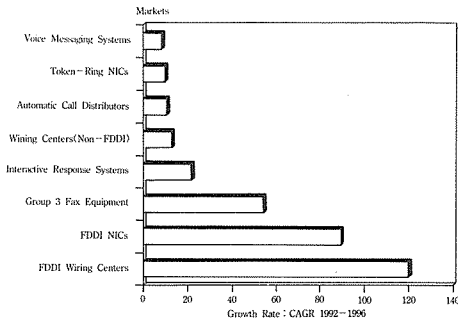
Source : Dataquest

15) Consumer Electronics Production (North America)



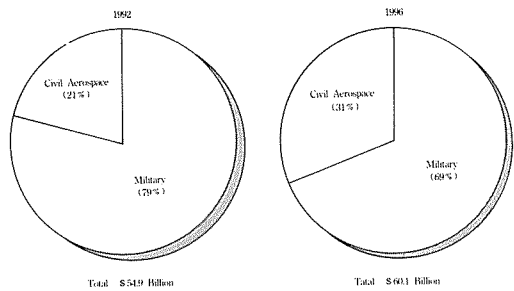
Source : Dataquest(October 1992)

13) High Growth Communication Market (North America)



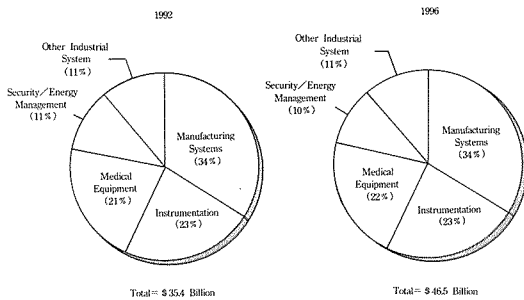
Source : Dataquest(October 1992)

16) Military and Civil Aerospace Electronics Production (North America)



Source : Dataquest(October 1992)

14) Industrial Electronics Production (North America)



Source : Dataquest(October 1992)

17) Automotive Electronics

(단위 : 백만불, %)

Equipment	1992	1993	1996	92-93	92-96
Automobile	6.5	6.7	7.2	6.5	3.8
Light Truck/Van	4.3	4.8	5.1	6.0	5.2
Total	10.8	11.5	12.3	6.3	4.4

Source : Dataquest