



Global Overview of the Hi-Tech Goods Industry

August 2025

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Scope

Key findings

GLOBAL OVERVIEW

Hi-tech goods industry to sustain growth, backed by AI spending

Asian countries are forecast to drive hi-tech goods industry's growth

Industry's operating costs on the rise, driven by material and labour cost increases

Industry managed to improve profitability despite cost pressures

China remains the largest exporter, but challenges mount

The US and China remain the largest importers of hi-tech goods

Key trends shaping the hi-tech goods industry in 2025 and beyond

Key trends uncovered

Macroeconomic/Industry trends

LEADING COMPANIES

Leaders maintain their positions in key hi-tech goods categories

Number of companies grow at modest pace, restricted by high entry barriers

Industry's concentration remains stable

COUNTRY SNAPSHOTS

China : Industry forecast to pick up growth from 2023-2024 levels

Investments in higher-value electronics sector to support industry's growth

USA : Industry forecast to show stable growth over 2025-2029

Long-term outlook remains stable, backed by strategic investments and strong demand

South Korea : Industry's growth to accelerate slightly over 2025-2030

Strong domestic demand, exports and AI boom to drive future growth

Taiwan : Industry forecast to show slower yet steady growth by 2029

Strong demand for hi-tech goods in export markets to drive growth

Japan : Industry expected to pick up growth over the forecast period

Industry's growth to accelerate, driven by capacity expansions and strong demand

Germany : Industry forecast to show stable growth by 2029

Expanding production capacity and government support to drive growth

India : Industry forecast to sustain rapid growth

Strong domestic market and capacity expansion to drive rapid growth

Singapore : Industry forecast to maintain steady growth

Industry forecast to maintain steady growth, supported by higher-value sectors

Mexico : Increased uncertainty weighs on industry's outlook

Changing US trade policy is the main concern for Mexico's hi-tech goods industry

Malaysia : Industry forecast to maintain growth

Strong global demand and new investments support industry's growth

Definitions

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