

## IDC: Mixed Q1 for Gaming PCs and Monitors

Written by Frederick Douglas  
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According to IDC, global shipments of gaming desktops and notebooks total 7.5 million units in Q1 2019, a -6.2% Y-o-Y decline brought about by inventory issues. In the meantime gaming monitors are up by 48.6% Y-o-Y, thanks to demand for second or external displays.

The quarter sees shipments of 3.5m gaming desktops, a drop of -10.6% Y-o-Y. The analyst attributes the decline to an oversupply of GPUs leading to more upgrades than replacements of desktops, as well as macroeconomic headwinds in large markets such as China. Meanwhile notebooks drop by -2% Y-o-Y as many gamers prefer to wait for the implementation of new GPUs in mobile systems.

| Worldwide Gaming Tracker Forecast by Product Category, Shipments, Market Share, and 2019 - 2023 CAGR (shipments in millions) |                 |                    |                 |                    |                   |
|--|-----------------|--------------------|-----------------|--------------------|-------------------|
| Product Category   | 2019 Shipments* | 2019 Market Share* | 2023 Shipments* | 2023 Market Share* | 2019 - 2023 CAGR* |
| Desktop  | 15.4            | 37.1%              | 17.5            | 31.6%              | 3.2%              |
| Monitor  | 6.8             | 16.3%              | 10.7            | 19.3%              | 12.1%             |
| Notebook   | 19.4            | 46.6%              | 27.2            | 49.1%              | 8.8%              |
| <b>TOTAL</b>   | <b>41.5</b>     | <b>100.0%</b>      | <b>55.3</b>     | <b>100.0%</b>      | <b>7.4%</b>       |
| Source: IDC Quarterly Gaming Tracker, June 24, 2019  |                 |                    |                 |                    |                   |

\* **Note:** All figures represent forecast data.

The top 5 gaming PC vendors are HP, Lenovo, Dell, Asus and Acer. Together the 5 companies hold 62.9% of the Q1 2019 gaming PC market, up from 58.4% in Q1 2018.

"Despite the recent downturn in the gaming PC market, we anticipate a rebound in the second half of the year as inventory issues clear out and new products hit store shelves," IDC says. "To date, uptake of Nvidia's RTX graphics cards has been relatively slow given the dearth of content. However, that's expected to change in the coming year as many of the AAA titles will support ray tracing, enticing gamers to purchase newer systems."

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IDC also expects the mid-price segment to push the market forward, with new CPUs and GPUs from AMD having their moment in the sun. The resurgence of AMD in the PC market should carry over into the gaming market, and the company will prove to be serious competition to both Intel and Nvidia in terms of performance per dollar.

Looking ahead, the analyst expects the gaming desktop, notebook and monitor market to grow 7.3% in full-year 2019, reaching 41.5m units. Driving the market are the rise of eSports, new business models (such as subscription services) and an abundance of videogames. As such, the market is set to reach 55.3m units by 2023 with a CAGR of 7.4%.

Shipments of gaming desktops are forecast to reach 17.5m units in 2023 with a CAGR of 3.2%. Gaming notebooks will grow to 27.2m in 2023 as demand continues to shift towards thin and light solutions. Gamers are also expected to take advantage of the prowess of new PCs by buying newer displays, and as such gaming monitor shipments should grow to 10.7m in 2023 with a CAGR of 12.1%.

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