

IDC: EMEA PC Market "Close to Stability" in Q1 2019

Written by Marco Attard
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According to IDC, the EMEA traditional PC (desktops, notebooks and workstations) market is down by -2.7% Y-o-Y in Q1 2019-- a "softer" decline bringing shipments of 17. million units.

Helping improve the situation in the market is the commercial segment, since shipment growth clocks at a healthy 6% Y-o-Y with both notebooks and desktops "doing well." The same cannot be said for consumer shipments falling by 12.6% Y-o-Y as both segments see double-digit declines. In some regions, such as W. Europe, commercial growth is strong enough (10.7% Y-o-Y) to offset consumer segment (-8.9%) to bring about overall growth (2.8%).

Top 5 Companies: Europe, the Middle East, and Africa (EMEA) Traditional PC Shipments*
2019Q1 (Preliminary) (000 Units)

Company	2019Q1 Shipments	2019Q1 Share	2018Q1 Shipments	2018Q1 Share	YoY Growth
HP Inc.	4,927	28.9%	5,037	28.8%	-2.2%
Lenovo (includes Fujitsu)	4,172	24.5%	4,085	23.3%	2.1%
Dell Inc.	2,531	14.9%	2,343	13.4%	8.0%
Acer	1,189	7.0%	1,381	7.9%	-13.9%
ASUS	1,115	6.5%	1,305	7.5%	-14.6%
Others	3,094	18.2%	3,351	19.1%	-7.7%
Total	17,029	100.0%	17,501	100.0%	-2.7%

Source: IDC Quarterly PCD Tracker (PC Pivot) EMEA Preliminary, 2019Q1, April 2019

"An exceptional commercial performance kept the W. PC market afloat," IDC remarks. "Despite component shortages and troublesome macroeconomic conditions in some of the major economies, Windows 10 refreshes, ongoing mobility adoption, and the fulfillment of backlogs

drummed up a strong commercial appetite that vendors were ultimately able to satiate."

CPU shortages continue to impact low-end model supply, while shifting consumer buying habits result in higher inventory levels, further contributing to the currently dismal consumer market. That said, premium, ultraportable thin and light devices, together with gaming, provide some pockets of growth for vendors willing to shift priorities from volume.

As for other regions, CEMA shipments are down by -12% Y-o-Y, with both CEE and MEA contracting by the double-digits. Consumer demand in both regions is down by double-digits, compared to a single-digit decline in commercial. Africa accounts for around 40% of MEA shipments, and outperforms the ME as C. Africa, N. Africa and the Sub-Saharan region show "good momentum."

CEE follows on a year of positive results with a Q1 2019 decline of -10.5% Y-o-Y. Inventory buildup affects shipments in Russia, especially in consumer space, while a lack of projects and CPU shortages hit the Ukraine and CIS countries. C. Europe performs slightly better, thanks to visible recovery in Poland and Czech Republic.

Moving to the vendor rankings, consolidation continues as the top 3 vendors take over 68.3% of Q1 2019 volume, up from 65.5% in Q1 2018. HP retains the top spot with 28.9% shipment share and an overall decline of -2.2% Y-o-Y. Lenovo (including Fujitsu) comes 2nd, with 24.5% market share and 1.2% Y-o-Y growth brought about by "exceptionally strong" commercial performance. In 3rd place is Dell reaching 14.9% market share and the strongest growth rate for the top vendors of 8% Y-o-Y.

In 4th and 5th place are Acer and Asus. A strong focus on the consumer market makes Acer susceptible to softness, leading to an overall decline of -13.9% Y-o-Y, while Asus shipments are down by -14.6% Y-o-Y bringing market share of 6.5%.

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