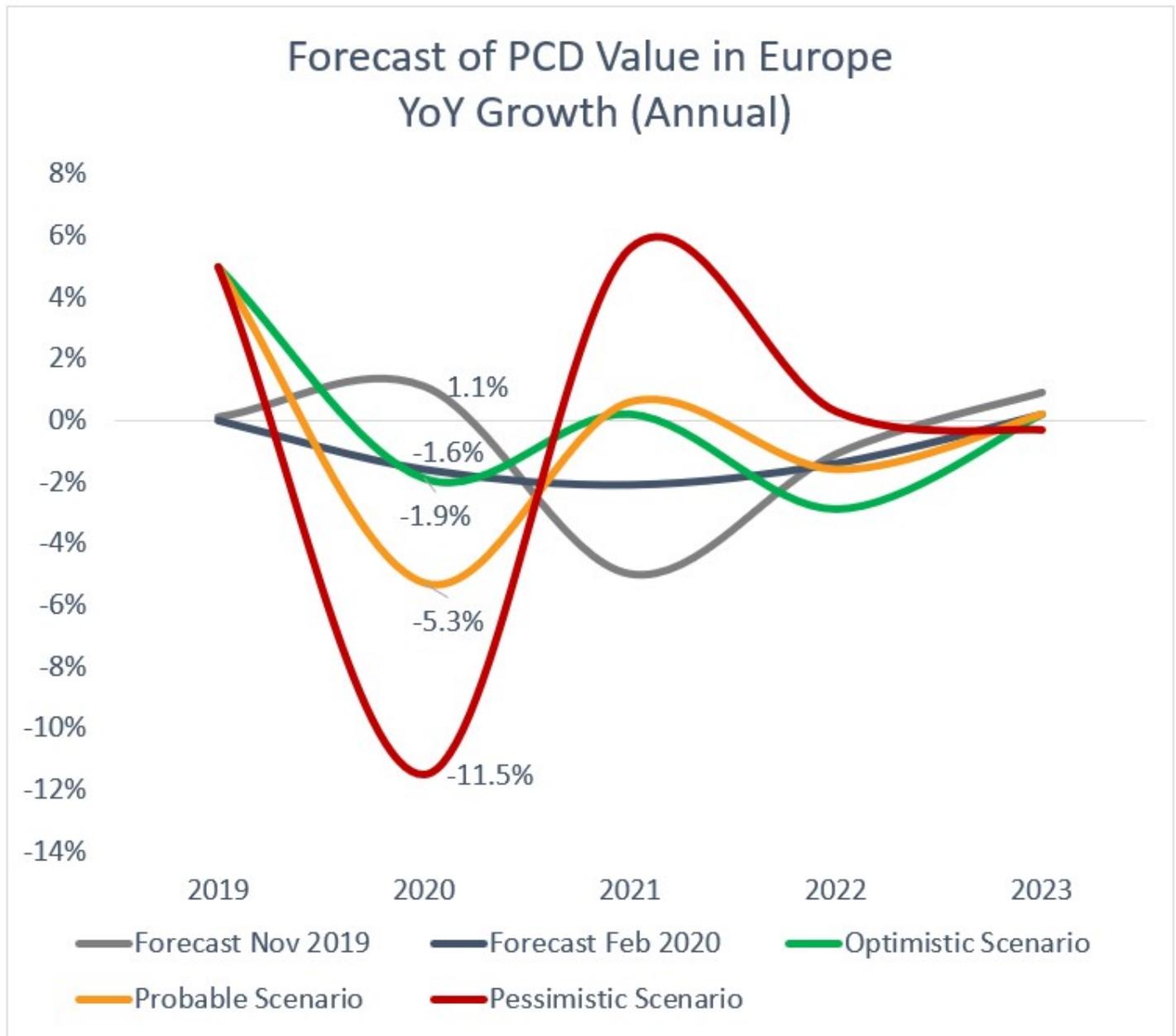


IDC: Work-at-Home Brings Surge in Notebooks and Tablets

Written by Marco Attard
14 April 2020

According to IDC, Q1 2020 sees spike of around 30% Y-o-Y in demand for notebooks and tablets across Europe, as coronavirus (aka Covid-19) lockdowns lead companies to equip employees to work from home while students set themselves to study remotely.



"This has led to many retailers and distributors in W. Europe running out of stock," the analyst

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says. "Disruption to the supply chain in China following the lockdown in Wuhan over the Chinese New Year cut deliveries into the European market by approximately 15%–20% in Q1 2020. More than 90% of the portable PCs and tablets imported into Europe are manufactured and assembled in China."

CEE also sees soaring demand for such devices as lockdowns are imposed. Demand comes from both consumers and companies looking to purchase computers, including both notebooks and tablets, for staff. Looking into Q2 2020, production is returning in China, but disrupted international logistics and border closures in Europe are leading to extended delivery lead times.

Looking to the future, the question is whether the spike in demand seen in Q1 2020 will continue into Q2 2020 as businesses falter and many others move to conserve cash. IDC predicts the personal computing device sector will "not suffer as much" from the rapid contraction in economic performance as many other sectors, since it is key to productivity from home for many workers. However, many companies will put off orders for office-based computers as they move to conserve cash, as will government tenders as state expenditures focus on fighting the virus.

For W. Europe, the "probable" IDC scenario has the European PCD market fall by -5% Y-o-Y in 2020. The drop may be "marginally higher" in CEE, as Russia sees a major drop in the ruble following the rapid fall in demand for oil precipitated by the coronavirus crisis. As a result, the market will decline in value not only in Russia, but also in other oil producing E. European countries and those with economic interconnection with Russia.

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