

Gartner: Tablets "Dramatically Change" PC Landscape

Written by Marco Attard
16 January 2013

The EMEA PC market sees 2 consecutive quarters of decline during H2 2012-- Q4 2012 shipments drop by -9.6% Y-o-Y to reach 28.1 million units as the market continues to "face many headwinds."

As a result overall 2012 EMEA PC shipments drop by 2.8% from 2011. W. Europe remains the Achilles heel of the region, while C. and E. Europe and MEA see Q-o-Q growth.

"The holiday season mostly saw retailers clearing Windows 7 notebook inventory or driving volume of low-end notebooks," Gartner remarks. "Furthermore, the increasing choice of tablets at decreasing price points no doubt became a favorite Christmas present ahead of PCs." In other words Windows 8 had zero impact on the holiday season due to Ultramobile products being both high in price and low in supply.

Preliminary EMEA PC Vendor Unit Shipment Estimates for 4Q12 (Units)

| Company | 4Q12 Shipments | 4Q12 Market Share (%) | 4Q11 Shipments | 4Q11 Market Share (%) | 4Q12-4Q11 Growth (%) |
|--------------|-------------------|-----------------------|-------------------|-----------------------|----------------------|
| HP | 5,346,900 | 19.1 | 5,829,182 | 18.8 | -8.3 |
| Lenovo | 3,087,629 | 11.0 | 2,386,877 | 7.7 | 29.4 |
| Acer Group | 3,015,318 | 10.7 | 3,532,612 | 11.4 | -14.6 |
| ASUS | 2,794,279 | 10.0 | 3,233,350 | 10.4 | -13.6 |
| Dell | 2,351,990 | 8.4 | 3,176,724 | 10.2 | -26.0 |
| Others | 11,458,059 | 40.8 | 12,887,932 | 41.5 | -11.1 |
| Total | 28,054,175 | 100.0 | 31,046,677 | 100.0 | -9.6 |

Note: Data includes desk-based PCs and mobile PCs, including mini-notebooks but not media tablets such as the iPad. Data is based on the shipments selling into channels.

Source: Gartner (January 2013)

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The analyst also suggests the tablet issue ranges beyond mere sales cannibalisation. Instead the PC landscape is shifting to one where individuals own tablets while a shared PC acts as a creative/administrative machine.

"We hypothesize that buyers will not replace secondary PCs in the household, instead allowing them to age out and shifting consumption to a tablet," Gartner suggests.

Further EMEA details from a dismal Q4 2012-- mobile PC shipments drop by -11%, desktops by -6% Y-o-Y, the All-in-One (AiO) format shows some promise as a platform judging from Asus, Lenovo and HP models.

HP remains the top EMEA vendor with 19.1% market share, thanks to strong performance within the enterprise segment. Meanwhile Lenovo beats Acer to the #2 position, being the only vendor showing growth (29.4% Y-o-Y) during the period.

Acer shipments drop by -14.6% Y-o-Y to reach 3m units, followed by Asus (2.8m) and Dell (2.4m).

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Preliminary Worldwide PC Vendor Unit Shipment Estimates for 4Q12 (Units)

| Company | 4Q12 Shipments | 4Q12 Market Share (%) | 4Q11 Shipments | 4Q11 Market Share (%) | 4Q12-4Q11 Growth (%) |
|--------------|-------------------|-----------------------|-------------------|-----------------------|----------------------|
| HP | 14,645,041 | 16.2 | 14,711,280 | 15.5 | -0.5 |
| Lenovo | 13,976,668 | 15.5 | 12,915,766 | 13.6 | 8.2 |
| Dell | 9,206,391 | 10.2 | 11,633,387 | 12.2 | -20.9 |
| Acer Group | 8,622,701 | 9.5 | 9,690,624 | 10.2 | -11.0 |
| ASUS | 6,528,228 | 7.2 | 6,133,042 | 6.5 | 6.4 |
| Others | 37,393,913 | 41.4 | 39,934,184 | 42.0 | -6.4 |
| Total | 90,372,942 | 100.0 | 95,018,284 | 100.0 | -4.9 |

Note: Data includes desk-based PCs and mobile PCs, including mini-notebooks but not media tablets such as the iPad. Data is based on the shipments selling into channels.

Source: Gartner (January 2013)

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