

IDC: Negative Q4 2018 for EMEA PCs

Written by Alice Marshall
30 January 2019

The traditional PC market (desktop, notebooks and workstations) comes in negative in Q4 2018, IDC reports-- shipments are down by -5.8% Y-o-Y to reach 19.6 million units, with declines in both commercial and consumer segments.

The decline in commercial space is arguably slight, being at -1.1% Y-o-Y, thanks to ongoing device renewals and increasing Windows 10 adoption. On the other hand consumer decline reaches -10.6%, and affects both desktops and notebooks. The analyst points out a number of reasons behind such results, including CPU shortages leading to vendors unable to meet seasonal demand, as well as disruptive macroeconomic and political scenarios taking place in multiple larger economies, including Brexit and the Yellow Vest movement.

Top 5 Companies, EMEA Traditional PC Shipments, Market Share and Year-over-Year Growth, 2018Q4 (Preliminary) — shipments in thousands of units

Company	2018Q4 Shipments	2018Q4 Share	2017Q4 Shipments	2017Q4 Share	YoY Growth
HP Inc.	5,474	28.0%	5,871	28.2%	-6.8%
Lenovo*	4,701	24.0%	4,786	23.0%	-1.8%
Dell Inc.	2,666	13.6%	2,521	12.1%	5.8%
Acer	1,561	8.0%	1,612	7.8%	-3.2%
Apple	1,523	7.8%	1,586	7.6%	-3.9%
Others	3,646	18.6%	4,408	21.2%	-17.3%
Total	19,571	100.0%	20,783	100.0%	-5.8%

Source: IDC Quarterly PCD Tracker (PC Pivot) EMEA Preliminary, 2018Q4, January 2019

W. European Q4 2018 shipments are down by -4.7% Y-o-Y, with slight commercial growth (1.3% Y-o-Y) insufficient to offset heavy consumer decline (-11.5% Y-o-Y). Enterprise are continuing to buy notebooks, particularly ultrabooks, bringing about some measure of stable

performance. On the other hand, the consumer segment shows weak performance in both categories, with the DACH region, France and UKI posting double-digit declines.

CEE shows some growth in Q4 2018, as shipments are up by 1% Y-o-Y. A number of deals and increased retailer orders managed to prevent product shortages in the holiday season, leading to notebook growth of 2.1%. Desktop shipments remain negative, however. Russia is the bolster of regional growth, despite swings in local currency and uncertainty brought about by imposed sanctions.

MEA reports a 2nd consecutive quarter of strong decline reaching -18.2% Y-o-Y. A few large tender deliveries in the commercial segment kept the PC market from downfall. S. Arabia shows "very strong" performance across both consumer and commercial sectors, while Turkish PC shipments are down by -60% Y-o-Y.

In vendor terms the PC market continues to consolidate, as the 3 top vendors account for 65.6% of the Q4 2018 market, up from 63.4% in Q4 2017. HP continues to lead, even if weak results in both notebooks and desktops bring about a -6.8% Y-o-Y decline on shipments reaching 5.5m units. Lenovo (including Fujitsu) follows, with strong commercial demand for desktops and notebooks bringing shipments reaching 4.7m, a -1.8% Y-o-Y decline.

In 3rd place is Dell, with double-digit commercial desktop Y-o-Y growth and single-digit notebook growth leading to shipments of 2.7m units. Acer comes 4th place, as it sees strong performance in big markets such as Russia, France and the UK, leading to flat to slightly growing market share. Closing the top 5 is Apple, with the new MacBook Air and Mac mini launches leading to shipment growth even as it loses EMEA market share.

Go [IDC EMEA Quarterly Personal Computing Device Tracker](#)