According to IDC, EMEA PC shipments are set to total 72.1 million units in 2019-- a 0.6% increase over 2018 brought about by the commercial segment, since weakness within the consumer continues to "constrict overall growth."

"The W. European PC market continued its growth momentum in Q3 2019, thanks to the ongoing commercial refresh ahead of Windows 7 EOS," the analyst says. "Enterprises and the public space were the frontrunners in the Windows 10 refresh to avoid the additional surcharge of Windows 7 support after January 2020. Predictions to H1 2020 remain positive owing to the strong demand from SMBs, but a further intensification of the Intel CPU shortage is expected to inhibit some of the fulfilments."

EMEA Traditional PC Forecast by Product

2019Q3 Forecast for 2019–2023 (Shipments in Thousands)

Product	2019 Shipments*	2019 Share*	2023 Shipments*	2023 Share*	2019–2023 CAGR*
Traditional NB	22,629	32.2%	16,007	24.6%	-8.3%
Ultraslim NB	20,652	29.3%	24,131	37.0%	4.0%
Convertible NB	4,424	6.3%	6,176	9.5%	8.7%
Traditional DT	19,464	27.7%	15,257	23.4%	-5.9%
All-in-one DT	3,201	4.5%	3,600	5.5%	3.0%
Total	**70,371**	**100.0%**	**65,171**	**100.0%**	**-1.9%**

Source: IDC Worldwide Quarterly Personal Computing Device Tracker, November 26, 2019. *Forecast data

In total commercial growth is to clock at a "sizable" 9.8% for 2019, despite potential CPU shortages leading to the inability to meet demand brought about by the Windows 10 refresh. Alternative Intel SKUs and AMD configurations can fill some of the gap between the supply of Intel CPUs and market demand, and the market segment will be further strengthened by enterprise mobility adoption, a strong pipeline of projects across all segments and Q4 2019 "use it or lose it" budgets in the public space.

Meanwhile outlook for the consumer segment remains negative, if with some signs of recovery as the inventory situation improves and promotional activity picks up ahead of Black Friday and Christmas. The desktop segment continues to lose share as consumers shift to thin and light devices, so much so notebooks should see "slight" recovery come Q4 2019. Convertibles and ultraslim devices provide pockets of growth in a recovery market while demand for gaming PCs remains, if not at the double-digit growth rates of recent quarters.

IDC predicts the CEE region will see a PC shipment declines of -3.3% Y-o-Y in Q4 2010 and -6.4% for the whole 2019, the result of weak consumer demand. Consumer demand has been decline quarter after quarter since 2018, and is set to only intensify as CPU shortages continue into the rest of the year. Commercial demand should remain strong though, with 2.6% Y-o-Y growth in Q4 2019 and 2.4% for overall 2019, thanks to the ongoing Windows 7 replacement and EU funding.

MEA is set to regain momentum on the back of a "very strong" H2 2018 decline. Results should be positive across both consumer and commercial spaces, with respective Q4 2018 shipments growing at 2.9% Y-o-Y and 4.7% Y-o-Y. However overall 2019 will be negative at -1.5% due to weak consumer performance.

Go [IDC WW Quarterly PC Tracker November 2019]