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)

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).

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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