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The EMEA traditional PC (desktops, notebooks and workstations) market is "almost flat" in Q3 2017, IDC reports-- shipments total 17.7 million units, a slight -0.5% Y-o-Y decline.

Commercial space sees slight (0.1% Y-o-Y) growth due to enterprise renewals and education deals, while holiday season promotions and gaming boost consumer growth. Notebooks show positive performance across EMEA (0.3%) and strong growth in CEE (5.6%), even if they are negative in both MEA (-4%) and W. Europe (-0.1%). On the other hand desktops are stronger in EMEA, eroding at a softer rate (-2.9%) with strong commercial demand in CEE (8%).

Top 5 Companies: Europe, the Middle East, and Africa (EMEA) Traditional PC Shipments*

2017Q3 (Preliminary) (000 Units)

Company	2016Q3 Shipments	2017Q3 Shipments	2016Q3 Share	2017Q3 Share	YoY Growth
HP Inc.	4,635	4,837	26.0%	27.2%	4.4%
Lenovo	3,592	3,783	20.1%	21.3%	5.3%
Dell Inc.	1,942	1,943	10.9%	11.7%	6.8%
ASUS	1,833	1,570	10.3%	8.9%	-13.6%
Acer Group	1,699	1,491	9.5%	8.4%	-12.2%
Others	4,154	3,993	23.3%	22.5%	-3.9%
Total	**17,854**	**17,761**	**100.0%**	**100.0%**	**-0.5%**

Source: *IDC Quarterly PCD Tracker (PC Pivot) EMEA Preliminary*, 2017Q3, October 2017

"The overall W. European traditional PC market showed clear signs of strength," the analyst says. "Although notebooks remained the primary growth driver, desktops emerged as a stronger category, declining at a softer rate. But results were varied within the region. While southern Europe witnessed solid results with Spain, Portugal, and Greece finally opening up their IT wallets for PCs, the Nordics slumped after several quarters of solid growth. Among the 3 big Western European economies, France outperformed Germany and the UK."

The traditional PC market is down by -1.3% Y-o-Y in W. Europe, with notebooks declining by -0.1% Y-o-Y after several quarters of positive performance and desktops showing some improvement with a -5.2% Y-o-Y decline. S. Europe shows most growth, with France, Spain and Portugal growing at 1.8%, 5.9% and 32.2% respectively. Benelux follows with 2.7% growth, while the UK, Nordics and DACH are down by -2.7%, -3.2% and -2.9% respectively.

Commercial space is down by -0.8% as it benefits from the acceleration of Windows 10 adoption by large and very large enterprises, as well as the continued adoption of portable form factors such as convertibles. On the consumer side holiday promotions, including Black Friday, help boost volumes.

Moving to CEMA, gorwth is flat at 1% Y-o-Y. CEE is gaining momentum with 6.4% growth through healthy demand from both consumer and commercial sectors. The desktop market records strong 8.1% growth, with large deals in the corporate and public sector driving demand, while the consumer sector sees a marginal -0.5% decline even as gaming products are making inroads in the region despite limited volumes. The CEMA notebook market is healthy with 5.6% Y-o-Y growth driven by consumer demand.

On the other hand MEA shows a different picture, with the traditional PC sector declining by -4.5% Y-o-Y. The corporate and government sectors are offsetting the overall PC decline, while consumer space remains constrained across nearly the entire region.

HP leads the EMEA PC rankings with 27.2% market share (a 1.3% Y-o-Y increase) the result of robust notebook performance combined with strong desktop results. Lenovo remains in 2nd place with 21.3% share (up by 1.2% Y-o-Y) driven by notebooks and desktops in commercial space. 3rd placing Dell also sees growing market share of 11.7% (a 0.8% Y-o-Y increase) through solid commercial notebook and desktop growth, as well as strong consumer notebook results.

Asus faces a challenging Q3 2017 with 8.9% market share. The company is consolidating its position in CEMA notebook space, even as its desktop results decline further. Rounding off the top 5 is Acer, with 8.4% market share driven by W. Europe and MEA, as well as double-digit growth in CEE.

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