

IDC: Commercial Renewals Keep EMEA PCs Stable

Written by Marco Attard
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The EMEA traditional PC (covering desktops, notebooks and workstations) market is "stable" in Q3 2018, IDC reports-- shipments total 18.1 million units, a 0.5% Y-o-Y increase brought about by ongoing commercial renewals.

The commercial segment is up by 4.9% Y-o-Y, the result of continued Windows 10 adoption. In contrast, consumer space remains negative with a -4.1% Y-o-Y decline, with drops in both desktops and notebooks. Desktops are down for the first time in 2018 (-2.4% Y-o-Y), if with growth in commercial space. In the meantime notebook performance remains stable (1.4% Y-o-Y), as mobility adoption and renewals drive commercial demand.

Company	2017Q3-Shipments	2018Q3-Shipments	2017Q3-Share	2018Q3-Share	YoY-Growth
HP-Inc.	4,837	4,947	26.9%	27.4%	2.3%
Lenovo (includes-Fujitsu)	4,119	4,314	22.9%	23.9%	4.7%
Dell-Inc.	2,074	2,351	11.5%	13.0%	13.4%
Acer	1,480	1,625	8.2%	9.0%	9.8%
Apple	1,429	1,325	7.9%	7.3%	-7.3%
Others	4,058	3,518	22.5%	19.5%	-13.3%
Total	17,998	18,081	100.0%	100.0%	0.5%

Traditional PC shipments in W. Europe see 2% Y-o-Y growth thanks to strong commercial shipments (8.3% Y-o-Y) offsetting consumer decline (-5.5% Y-o-Y). The main reason of the overall consumer decline is primarily desktops, even if notebooks are also down, if at a softer rate. On the commercial side, ongoing device renewals in midmarket space and growing Windows 10 adoption continues to drive growth. Education surely also contributed to such growth, what with Q3 2018 being the back-to-school quarter.

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From a sub-regional perspective, the Nordics, DACH and UKI are strong performers. The strongest, however, is Benelux, with double-digit growth in commercial space. That said, all subregions see positive performance in commercial space, even with impact left by the ongoing CPU shortage.

Ultramobile, thin and light and 2-in-1 devices spur consumer interest in W. Europe, helping soften the overall notebook decline. Another "strong" pocket of growth is gaming, even if shipments are, ultimately, "not substantial in volume.

IDC describes the situation in CEE and MEA as "surprising"-- while CEMA Q3 2018 PC shipments are down by -2.4% Y-o-Y, shipments are up by 7.1% Y-o-Y in CEE and down by nearly -60% Y-o-Y in MEA. The better-than-expected CEE results come thanks to Russia reporting double-digit growth, since despite all uncertainty about sanctions and ruble fluctuations the Russian economy remains stable with low inflation. Further boosting demand are a few large deals in the corporate and public sectors.

As for MEA, the region is hit by the worst decline in Turkey. The country is currently facing major challenges, with currency fluctuation and economic uncertainty affect all commercial segments.

In the vendor rankings, HP remains on top of the EMEA pile with 28.4% market share and 2.3% Y-o-Y growth. Helping maintain such a position are "solid" results across both segments. Lenovo (including Fujitsu) is 2nd, with 23.9% market share achieved through "particularly strong" notebook performance in commercial space.

In 3rd place is Dell, with 13% market share and 13.4% Y-o-Y growth brought about by excellent results in both commercial and consumer segments. Acer follows with 9% market share, with solid performance in a shrinking consumer market and "exceptional" commercial performance driven by back to school purchases. Last is Apple, with 7.3% share despite shipment decline of -7.3% Y-o-Y.

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