EMEA PC shipments total 18 million in Q1 2019, Gartner reports-- a -2.2% Y-o-Y decline, with enterprise demand continuing to grow as companies move ahead with Windows 10 deployments while the consumer segment remains weak.

As the analyst puts it, consumers are neither replacing older PCs nor migrating to hybrid systems. In fact, hybrid devices are not too popular in EMEA, since users appear to prefer using larger displays.

Table 1
Preliminary Worldwide PC Vendor Unit Shipment Estimates for 1Q19 (Thousands of Units)

Company	1Q19 Shipments	1Q19 Market Share (%)	1Q18 Shipments	1Q18 Market Share (%)	1Q19-1Q18 Growth (%)
Lenovo	13,196	22.5	12,343	20.1	6.9
HP Inc.	12,826	21.9	12,727	20.7	0.8
Dell	9,989	17.6	9,841	16.0	1.5
Apple	3,977	6.8	4,078	6.6	-2.5
Asus	3,603	6.2	3,887	6.3	-7.3
Acer Group	3,322	5.7	3,829	6.2	-13.2
Others	11,610	19.8	14,671	23.9	-20.9
Total	**58,523**	**100.0**	**61,375**	**100.0**	**-4.6**

Notes: Data includes desk-based PCs, notebook PCs and ultramobile premiums (such as Microsoft Surface), but not Chromebooks or iPads. All data is estimated based on a preliminary study. Final estimates will be subject to change. The statistics are based on shipments selling into channels. Numbers may not add up to totals shown due to rounding. Source: Gartner (April 2019)

On a global scale, Q1 2019 PC shipments total 58.5 million units, a -4.6% Y-o-Y decline. CPU shortages impact all PC businesses as vendors allocate to higher-margin business and the Chromebook segment.

“While the consumer market remained weak, the mix of product availability may have also hindered demand," the analyst remarks. "In contrast, Chromebook shipments increased by double digits compared with Q1 2018, despite the shortage of entry-level CPUs. Including Chromebook shipments, the total worldwide PC market decline would have been -3.5% in Q1 2019.”#

Supply constraints even affect the vendor competitive landscape, with leading vendors having better chip allocation. They also start sourcing alternative CPUs from AMD. As a result, the top 3 global vendors-- namely Lenovo, HP and Dell-- show shipment growth in Q1 2019 despite the supply constraint, thanks to a focus on high-end products and taking share from small vendors struggling to secure CPUs.

The top 3 vendors account for 64.5% of Q1 2019 PC shipments, an increase from the 56.9% share of Q1 2018. They continue to gain PC market share as scale becomes a bigger factor in industry dynamics, and the Intel CPU supply constraint only accelerates the trend. Lenovo remains top vendor, with 6.9% Y-o-Y growth, in part driven by increases in EMEA as well as Japan.

HP comes 2nd with 0.8% Y-o-Y growth. The company sees a small increase in EMEA, but declines in all other regions. Dell follows as Q1 2019 is a 5th consecutive quarter of PC shipment growth. It sees growth in EMEA, L. America and Japan, with "strong" desktop PC shipments in all regions.

As mentioned earlier, business PC demand remains strong in Q1 2019-- but Gartner warns 20019 is the last year the Windows 10 refresh will impact PC shipments. After all, the refresh has been a driving force in PC shipments for the past 3 years, and the positive results of Q1 2019 could be a sign it has nearly peaked.

Go Gartner Says WW PC Shipments Declined 4.6 Percent in Q1 2019