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Inventory issues, political instability in C. Europe and the M. East, and currency fluctuations continue to affect the EMEA PC market in Q3 2015 IDC reports, as shipments drop by -23% Y-o-Y to 18.4 million units.

Windows 10 machine shipments did show an increase in September but the free upgrade program ensured no significant demand, instead allowing retailers to focus on selling remaining Windows 8 product stock.

Top 5 Vendors: Europe, the Middle East, and Africa (EMEA) PC Shipments* 3Q15 (Preliminary) (000 Units)

Vendor	3Q14 Shipments	3Q15 Shipments	3Q14 Share	3Q15 Share	3Q15/3Q14 Growth
HP	5,254	4,353	22.0%	23.7%	-17.1%
Lenovo	4,610	3,684	19.3%	20.1%	-20.1%
Dell	2,099	1,863	8.8%	10.1%	-11.3%
Acer Group	2,854	1,770	12.0%	9.6%	-38.0%
ASUS	2,026	1,510	8.5%	8.2%	-25.5%
Others	7,004	5,185	29.4%	28.2%	-26.0%
Total	**23,847**	**18,365**	**100.0%**	**100.0%**	**-23.0%**

Source: *IDC EMEA Quarterly PC Tracker*, Preliminary Results, 3Q15, October 2015

"The Q3 2015 trends in the EMEA PC market turned out to be very similar to Q2 2015," the analyst says. "Bringing inventory levels under control has proven to be very challenging but there has been clear progress and this should facilitate new shipments in Q4. Moreover, some countries in the region continued to suffer from currency volatility and political instability, which have now been constraining IT spending for several quarters."

The PC shipment contraction is visible across all EMEA regions-- W. European shipments are down by -18.4% Y-o-Y, MEA sees a -28.4% Y-o-Y drop and CEE has the steepest 31.3% Y-o-Y decline. The market suffers in comparison against Q3 2014, when Bing notebooks boosted the consumer notebook segment while the enterprise segment was benefiting from end of Windows XP support related renewals, and as such consumer segment shipments are down by -28.1% Y-o-Y and enterprise shipments contract by -17.2%. Y-o-Y

Bing inventory from the previous quarters continues to affect consumer shipments and the consumer products remain aggressively priced, due to vendors trying to sell out older SKUs to make way for new products in the channel. Meanwhile many businesses are delaying PC purchases until the beginning of 2016 in order to benefit from new CPU technologies. As a result, EMEA desktop PC shipments are down by 23.3% Y-o-Y and portable PC shipments post a 22.8% Y-o-Y decline.

Will Windows 10 bring any change to the EMEA PC market? Maybe until the holiday season, when customers might be tempted to get an attractively priced renewal and enterprises consider purchases to fully leverage new Windows 10 features.

When it comes to vendors, all companies ranking in the top 5 see shipment declines. HP leads even as it sees steep consumer shipment declines (the result of a focus on inventory depletion and comparison with a strong Q3 2014) together with better performance in the inventory segment, while 2nd placing Lenovo sees a negative (if "slightly above the market average") quarter as it suffers from high inventory levels.

Dell has a strong Q3 2015 through less focus on the consumer business, Acer claims 4th place through a space for new product sell-in in preparation for the holiday season and Asus drops to 5th place due to the need to reduce inventory.

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