EMEA PC shipments total 17.5 million units in Q1 2018, IDC reports-- a slight 0.6% Y-o-Y increase as commercial shipments just about manage to offset declines in consumer space.

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

2018Q1 (Preliminary) (000 Units)

Company	2017Q1 Shipments	2018Q1 Shipments	2017Q1 Share	2018Q1 Share	YoY Growth
HP Inc.	4,477	5,038	25.7%	28.8%	12.5%
Lenovo	3,592	3,754	20.6%	21.4%	4.5%
Dell Inc.	2,086	2,343	12.0%	13.4%	12.3%
Acer	1,700	1,383	9.8%	7.9%	-18.6%
ASUS	1,617	1,313	9.3%	7.5%	-18.8%
Others	3,938	3,679	22.6%	21.0%	-6.6%
Total	**17,410**	**17,510**	**100.0%**	**100.0%**	**1.2%**

Source: *IDC Quarterly PCD Tracker (PC Pivot) EMEA Preliminary*, 2018Q1, April 2018

Commercial shipments are up by 6.2% Y-o-Y thanks to enterprise renewals, while the consumer market is down by -5.2% due to market saturation in W. Europe. EMEA notebook shipments are down by -0.5% Y-o-Y as demand for mobility and security drive commercial growth, offsetting weak consumer performance in W. Europe. However the "real drivers" of the quarter are desktops, with 2.9% Y-o-Y growth driven by a "strong" commercial outlook as well as ongoing traction in the gaming market.

W. European traditional PC shipments are down by -4.3% Y-o-Y, driven by a mix of growing commercial notebook demand and a desktop PC resurgence leading to near-flat results. Commercial traditional PC shipments show 6.3% Y-o-Y growth in W. Europe, with solid growth across both product categories, and commercial desktops see the first annual growth in 14 quarters.

"In W. Europe the commercial segment had an outstanding quarter, with certain subregions such as UKI and Benelux posting double-digit growth," IDC says. "As recent data breaches and the looming influence of the GDPR compliance mandate have caused growing security concerns, both the public and private sectors are ramping up to renew their devices."

Meanwhile CEMA sees "excellent" Y-o-Y growth through stronger demand in CEE, where shipments are up by 14.3% Y-o-Y-- an unexpected growth spurt driven by both consumer and commercial segments. Russia posts the strongest performance in CEE, as sanctions fail to impact desktop and notebook demand. Key countries such as Hungary, Czech Republic and Poland also report better-than-expected results, particularly in notebook shipments, thanks to stable economic growth leading to improved consumer confidence.

MEA also performs above expectations in Q1 2018, with growth reaching 6.2% Y-o-Y thanks to good results from the largest countries. Turkey and S. Arabia have aggressive retail promotions, and S. Arabia also has some vendors boosting consumer demand through a VAT discount campaign (following the VAT implementation of early 2018).

In the vendor rankings, HP remains in the top spot with 28.8% market share (a 3.1% Y-o-Y increase), the result of strong performance in both desktops and notebooks. Lenovo retains 2nd place with 21.4% share (up by 0.8% Y-o-Y), as commercial desktops and notebooks drive "solid" results.

Dell comes 3rd as it posts 13.4% share (up 1.4% Y-o-Y) through strong notebook performance and "even stronger" desktop results in both consumer and commercial space. Acer has 7.9% share (a -1.9% Y-o-Y drop) as it performs poorly in W. Europe while gaining a strong foothold in CEMA, leading to 4th place in the rankings. In 5th place is Asus with 7.5% share (down -1.8% Y-o-Y), the result of a challenging Q1 2018 in all territories except CEMA.

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