Indonesia PC Market Grows 50% YoY in 1H21 but Ongoing Shortages Continue to Affect Shipments

JAKARTA, September 8, 2021 – According to the latest International Data Corporation’s (IDC) Quarterly Personal Computing Devices Tracker, the Indonesia PC market (desktops, notebooks, workstations) grew by 50% in 1H21 year over year (YoY), with a total of 2.06 million units shipped into the country during the first six months of 2021. Notebooks continued to be the driving category for both the consumer and commercial segments, taking an 85% share of the total PC shipments with an impressive 78% yearly growth for 1H21.

Shipments in 1H20 were abnormally low because of the COVID-19 pandemic. Although the market was forecast to slow down, the actual demand came in stronger than expected and caught PC market players by surprise. In addition, disruption in logistics and supplies due to factories closures in China led to very few shipments making it into the country at the start of 2020. In contrast, the overall supply in 1H21 showed a significant improvement from last year, but supply issues persist and market players were unable to keep up with the demand coming from both the consumer and commercial segments. Shipments were inconsistent, with PC vendors unable to predict the volume and arrival date of stocks into the country, leading to some orders coming in late in the quarter and this has resulted in stocks being carried over to the following quarter.

"With the virus outbreak still out of control, hybrid working arrangements continue to be implemented by companies in Indonesia, which has led to strong demand for mobile devices in the private sector. In the public sector, the bulk of the demand was driven by the Chromebook devices that will be used for the education tender following the government’s decision to shift its purchases toward Chrome OS devices," said Stallone Hangewa, Senior Market Analyst at IDC.
Indonesia. “Shipments for both consumer notebooks and desktops bounced back by 22% and 28% YoY, respectively, during the 1H21. Since schools continued online learning arrangements, notebooks are still the preferred devices as webcams have become essential during school sessions,” he added.

Indonesia Top 5 PC Company Highlights for 1H21

ASUS maintained its top position in 1H21 with a 25% of market share. The vendor performed well both in the consumer and commercial segments. Its commercial shipments showed an impressive growth of 1,141% driven by the Chromebook education project.

Acer Group climbed to the second from the fourth spot in 1H21. The Chromebook fulfillments to the education space helped its commercial segment perform well. Its consumer business is also doing well despite ongoing supply shortages.

Lenovo slipped to the third position in 1H21. Despite losing the second spot, Lenovo’s overall shipments grew by 32% YoY. In contrast to other PC vendors, Lenovo did not ship any Chromebook devices in 1H21.

HP Inc. came in at number 4 with a 14% market share in 1H21, growing 2% YoY despite facing
ongoing shortages, especially in the consumer segment. It also participated in the Chrome education deal which, helped boost its performance in the commercial space.

Dell Technologies remained in the fifth position, with a 9% market share in 1H21. Ongoing shortages impacted its consumer segment, which declined by 4% YoY. However, Dell Technologies' commercial segment performed exceptionally well, growing by 125% YoY thanks to the Chromebook shipments for the education project.

Figure 1

“Regarding 2H21, the opportunities for the PC market in Indonesia remain wide open, but stocks availability remains questionable for all PC vendors, which may potentially lead to opportunity loss,” said Hangewa. “Following
the government’s recent announcement related to devices purchased for the public education sector, in which the products must have a combined total of 40% local content and company benefit value, local brands are expected to contribute more to the overall Indonesia PC market. In the consumer segment, online purchases are predicted to grow because of the lockdown measurements implemented by the government starting in the third quarter. The strong demand for notebooks is expected to continue despite schools reintroducing face-to-face classes in several cities,” he added.

Notes:

• Shipments include shipments to distribution channels or end-users. OEM sales are counted under the company/brand under which they are sold.
• The enterprise segment refers to companies with 500 employees and more. Small and medium-sized businesses (SMBs) refer to companies with fewer than 500 employees.
• Traditional PCs include desktops, notebooks, and workstations but not tablets and x86 servers. Detachable tablets and slate tablets are part of the personal computing devices tracker but were not addressed in this press release.

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