

## EMEA PC Market Will Be Impacted but Not Rocked by the Coronavirus in 2020, Says IDC

LONDON, February 25, 2020 — Shipments of EMEA traditional PCs (a combination of desktops, notebooks, and workstations) will total 72.2 million in 2020, a 1.0% YoY decline. The remaining Windows 10 transitions will continue to drive demand in the commercial space, but ongoing stagnation in the consumer market along with negative supply chain ramifications will keep the PC market in negative territory. The first half of 2020 will fare stronger than the latter, with overall growth of 1.6% YoY expected for 1Q20 and a flat performance in 2Q20.

"Intel CPU shortages as well as supply chain concerns stemming from the coronavirus outbreak will impact the Western European PC market in 1H20," said Helena Ferreira, research analyst, IDC Western European Personal Computing Devices. "Notebooks will be particularly vulnerable to the supply constraints due to the high concentration of manufacturing that occurs in the affected areas of mainland China."

Nevertheless, healthy levels of inventory along with the prioritization of Windows 10 transition deals mean that the strong demand in the public and SMB space should largely be met through 1H20. Commercial appetite for desktops has also proven to be stronger than anticipated, particularly for those with smaller form factors, helping to drive overall commercial growth in the first three quarters of 2020.

The consumer outlook remains soft and growth is not expected until 4Q20. Desktops will continue to lose share to their more mobile counterparts, with the decline compounded by their comparatively lengthy product life cycles and the anticipated gradual slowdown in demand for gaming. Despite the notebook category gaining share in the market, particularly those with thin and light form factors, economic

and political turbulence in some key geographies will negatively impact overall consumer demand and limit notebook growth to around 1% YoY in both quarters of 1H20.

Despite the impact of the coronavirus, which has resulted in the temporary closure of some factories and manufacturing plants in China, both the CEE and MEA regions have only slightly revised down the overall PC market for the first half of 2020 forecast compared with the previous forecast.

However, the impact of a possible supply shortage could easily result in an increase in sales price. The overall CEE region forecast for PCs is expected to maintain the same volume in 1Q20 as in the previous year, but to decline by 2.7% YoY for the full year 2020.

"The commercial space is expected to remain relatively strong in the first half of 2020 thanks to a few large deals in the public sector, but the consumer space will remain inhibited by a lack of demand, longer PC life cycles, and a lack of inventories at the end of 2019 in key countries," said Nikolina Jurisic, program manager, CEMA. "For MEA the overall PC market is expected to decline by 0.7% in 1Q20, with the year ending at -1.1% YoY, as not even the commercial segment

will be able to absorb the weak consumer demand."

EMEA Traditional PC Forecast by Product

4Q19 Forecast for 2020 to 2024  
(Shipments in Thousands)

Product	2020 Shipments	2020 CAGR	2024 Shipments	2024 CAGR	2020-2024 CAGR*
Traditional NB	20,212	28.7%	15,480	23.1%	6.4%
Ultra NB	22,723	32.3%	25,780	38.4%	3.2%
Convertible NB	5,115	7.7%	6,564	9.8%	5.1%
Traditional DT	6,702	26.6%	15,792	23.5%	4.1%
All-in-one DT	3,355	4.8%	3,514	5.2%	1.2%
Total	70,387	100.0%	7,137	100.0%	1.2%

Source: IDC Worldwide Quarterly Personal Computing Device Tracker, February 19, 2020.

\*Forecast data

IDC's Quarterly PCD Tracker provides unmatched market coverage and forecasts for the entire device space, covering PCs and tablets, in more than 80 countries — providing fast, essential, and comprehensive market information across the entire personal computing device market.

For more information on IDC's EMEA Quarterly Personal

Computing Device Tracker or other IDC research services, please contact Vice President Karine Paoli on +44 (0) 20 8987 7218 or at [kpaoli@idc.com](mailto:kpaoli@idc.com). Alternatively, contact your local IDC office or visit [www.idc.com](http://www.idc.com).

IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. Additional information can be found at [www.idc.com](http://www.idc.com). All product and company names may be trademarks or registered trademarks of their respective holders.

For more information contact:

Helena Ferreira ([hferreira](mailto:hferreira))

[hferreira@idc.com](mailto:hferreira@idc.com)

+44 (0) 20 8987 7195

Liam Hall ([lhall](mailto:lhall))

[lhall@idc.com](mailto:lhall@idc.com)

+44 (0) 20 8987 7204

Nikolina Jurisic ([njurisic](mailto:njurisic))

[njurisic@idc.com](mailto:njurisic@idc.com)

+385 1 304 0050

Stefania Lorenz ([slorenz](mailto:slorenz))

[slorenz@idc.com](mailto:slorenz@idc.com)

+44 (0) 20 8987 7249