EMEA PC Market Remains Positive in 2021Q2, Despite Commercial Slowdown and Lifting of Lockdowns, Says IDC

LONDON, July 26, 2021 — The Europe, Middle East, and Africa (EMEA) traditional PC market, (desktop, notebooks, and workstations) saw growth of 6.5% YoY in 2021Q2 — a total of 22.2 million units, according to International Data Corporation (IDC). Unfavorable growth rates versus 2020Q2 — the first full quarter propelled by COVID demand — makes 2021Q2 appear slightly weaker than other COVID-hit quarters, despite strong unit shipments overall.

The Western European PC market posted growth of 6.5% YoY. Desktops grew by 6.2% YoY, their recovery attributed to continued demand for gaming devices during lockdowns, for consumers looking to entertain themselves and socialize online with friends. Notebook growth (+6.6% YoY) has slowed down, after four consecutive quarters of double-digit growth. Similar to PC shipments for overall EMEA, Western European notebook shipments are in line with recent quarters, but the large growth rates of last year make for unfavorable comparisons.

"The supply issues concerning a range of crucial components continue to limit shipments in the Western European market," said Simon Thomas, research analyst for IDC Western European Personal Computing Devices. "This, combined with partial relaxing of lockdowns and a return to seasonality, has slowed the rapid growth seen in recent quarters."

Consumer growth in Western Europe softened from last quarter, posting a rise of 18.6% YoY, with 6.3 million units shipped. Despite quarter-on-quarter declines, both desktops and notebooks enjoyed double-digit growth compared with last year (+36.1% YoY and +15.5% YoY respectively). This is due to prioritization of fulfillment of demand from consumer channels, as there is higher flexibility in adoption of PCs of varied specifications as opposed to commercial segments.
In the Western European commercial market, there was a decline of -0.8% YoY in 2021Q2. The desktop fall of -7.3% YoY was its fifth consecutive quarter of decline, and was not offset by notebooks, which posted flattish growth of 0.7% YoY. A recovery in desktops is expected in the second half of 2021, as businesses equip more employees who are returning to the office for longer periods of time.

Overall PC shipments in CEE and MEA were inhibited by the supply issues and by ongoing component shortages, with both regions reporting single-digit increases of 5.6% YoY and 7.7% YoY respectively. "In the CEE region, the commercial segment reported a decline of -1.8% YoY. Some of the education deals could not be fulfilled due to availability issues, and they are expected to be shipped later in the year. The consumer sector remained relatively strong at 11.1% YoY growth. Inventory in a few countries is improving but is still below the comfortable zone. However, the MEA region reported positive commercial results at 16.1% YoY and consumer remained flat YoY," said Nikolina Jurisic, associate research director, IDC Europe.

Vendor Highlights

The consolidation of the traditional PC market slowed again, as the
top 5 vendors' share decreased in 2021Q2. The top 5 players accounted for 80.4% of total market volume, falling slightly from 80.5% in 2021Q1.

- Lenovo (including Fujitsu) regained first position, with a market share of 25.8% (+0.2% points YoY). The vendor saw overall growth of 5.5%, due to a positive performance in both segments.
- HP Inc. fell to second position, with a market share of 24.3% (-4.3% points YoY). Despite growth on the consumer side (+2.4% YoY), a commercial decline (-17.4% YoY) due to component supply issues resulted in HP posting a decline of -11.2% YoY overall.
- Dell Inc. kept third position, with a market share of 13.5% (+0.4% points YoY) and growth of 8% YoY. A good commercial performance (+16.4% YoY) offset a slump on the consumer side, where it declined by -36.3% YoY.
- Acer maintained fourth place, with a market share of 9.6% (+1.5% points YoY). Another solid performance in the consumer market (+23.1% YoY) resulted in the vendor posting 23.9% YoY growth overall.
- ASUS retained fifth position, with a market share of 7.4% (+0.2% points YoY). Its 6.8% YoY rise can be attributed to consumer growth of 9% YoY.

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

2021Q2 (Preliminary) (000 Units)
<table>
<thead>
<tr>
<th>Company</th>
<th>2021Q2 Shipments</th>
<th>2021Q2 Share</th>
<th>2020Q2 Shipments</th>
<th>2020Q2 Share</th>
<th>YoY Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lenovo (includes Fujitsu)</td>
<td>6,718</td>
<td>25.8%</td>
<td>5,418</td>
<td>25.6%</td>
<td>5.5%</td>
</tr>
<tr>
<td>HP Inc.</td>
<td>5,384</td>
<td>24.3%</td>
<td>6,067</td>
<td>28.6%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Dell Inc.</td>
<td>2,998</td>
<td>13.5%</td>
<td>2,776</td>
<td>13.1%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Acer</td>
<td>2,121</td>
<td>9.6%</td>
<td>1,712</td>
<td>8.1%</td>
<td>23.9%</td>
</tr>
<tr>
<td>ASUS</td>
<td>1,635</td>
<td>7.4%</td>
<td>1,531</td>
<td>7.2%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Others</td>
<td>3,342</td>
<td>19.6%</td>
<td>3,696</td>
<td>17.4%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Total</td>
<td>22,199</td>
<td>100%</td>
<td>21,199</td>
<td>100%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

Source: IDC Quarterly PCD Tracker (PC Pivot) EMEA Preliminary, 2021Q2, July 2021

Table notes:

- Some IDC estimates were made prior to financial earnings reports.

- Shipments include shipments to distribution channels or end users. OEM sales are counted under the vendor/brand under which they are sold.

- Traditional PCs include desktops, notebooks, and workstations, and do not include tablets or x86 servers. Detachable tablets and slate tablets are part of the Personal Computing Device Tracker, but are not addressed in this press release.

- Data for all vendors is reported for calendar periods.

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. Alternatively, contact your local IDC office or visit www.idc.com.

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