



Middle East & Africa Personal Computing Devices Market Continues to Struggle, but Forecast Improves Amid Buoyant Corporate Demand

Dubai – The Middle East and Africa (MEA) personal computing devices (PCD) market, which is made up of desktops, notebooks, workstations, and tablets, declined 13.4% year on year in Q1 2019, according to the latest insights from International Data Corporation (IDC). The global technology research and consulting firm's *Quarterly PCD Tracker* shows that shipments fell to a new low of around 4.9 million units for the three-month period, the lowest since Q3 2010.

"The biggest declines were seen in the 'Rest of Middle East' sub-region, which includes Iran among a number of other countries," says Fouad Charakla, IDC's senior research manager for client devices in the Middle East, Turkey, and Africa. "Tightening U.S. sanctions continue to make it hard for companies based outside Iran to deal with companies located inside the country, especially when it comes to sending or receiving payments. This has had a severe negative impact on PCD supply in the country."

"Another significant decline was seen in Turkey, where the Turkish Lira remains weak against the U.S. dollar. This means that the cost of most imported goods, including personal computing devices, remains high, causing demand to suffer. The region's other key markets – the UAE, Saudi Arabia, and South Africa – also experienced significant year-on-year declines annually."

The top three vendors in the MEA PC market maintained their respective positions, with each of them gaining share on the corresponding quarter of 2018.

Middle East & Africa PC Market Vendor Shares – Q1 2018 vs. Q1 2019		
Company	Q1 2018	Q1 2019
HP Inc.	31.4%	32.1%
Lenovo	19.4%	21.8%
Dell	14.9%	18.1%
Others	34.3%	28.0%

Although losing some market share, Samsung continued to lead the tablet segment, while Huawei gained considerable share to climb up to second place. Apple ranked third.

Middle East & Africa Tablet Market Vendor Shares – Q1 2018 vs. Q1 2019		
Company	Q1 2018	Q1 2019
Samsung	21.2%	19.5%
Huawei	10.2%	14.5%
Apple	10.3%	10.0%
Others	58.3%	56.0%

Owing to the better-than-expected outcome of Q1 2019, combined with a slightly better outlook for the upcoming period, IDC has revised its forecast upwards. However, the market is still expected to continue declining at a considerable pace.

Turkey and Iran will continue to suffer under the weight of the previously mentioned challenges, with the situation in Iran not expected to recover any time soon. The performance of the Turkish PC market is expected to stabilize by the second half of the year, reflecting some year-on-year growth for that period.

"With the slow but continuing shift of usage from notebooks and especially tablets to smartphones, the consumer segment will be the most affected and is set to continue declining throughout the forecast period," says Charakla. "However, in contrast to this decline in consumer demand, commercial PCD shipments into the region are actually expected to grow annually, with demand forecast to remain steady in most countries across the region for Q2 2019. Several large corporate deals in the UAE, Egypt, Saudi Arabia, Turkey, Qatar, Ethiopia, and Kenya will act as the market's drivers."

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