Southern Africa PC & Tablet Market Overcomes Shortages of Components & Chipsets to Grow in First Half of 2021

Johannesburg – Southern Africa's personal computing devices (PCD) market, which comprises desktops, notebooks, and tablets, recorded year-on-year (YoY) growth of 20.1% growth in the first half of 2021 (H1 2021), according to the latest research by International Data Corporation (IDC). This growth was despite the global stock supply challenges caused by a shortage of components and chipsets.

The firm's quarterly PCD tracker reveals that total shipments across Southern Africa (i.e., South Africa, Botswana, and Namibia) grew to reach 1.46 million in H1 2021. Notebooks, with 42.4% YoY growth, and tablets, with 10.2% YoY growth, led the way while desktop shipments declined 30.3% over the same period. Shipments of gaming devices increased 93.7% YoY as the market saw the entry of more affordable devices to accommodate declining consumer incomes. Previously, the gaming market was dominated by premium products.

"The Southern Africa PCD market continued to experience a surge in demand, particularly for mobile devices such as notebooks and tablets, due to huge corporate backlog orders, the continuation of work-from-home policies, and the growing adoption of education technologies to support elearning," says Grace Munyi, a research analyst at IDC. "However, stock supply shortages continued, driving vendors to place orders with manufacturers a year in advance and order higher stock volumes than required to help navigate the challenge. This enabled them to ship higher a number of devices than the previous year's stock volume."

Additionally, the countries that make up the Southern Africa region each experienced some rebound of economic activity in H1 2021, with businesses allocating higher budgets to IT purchases within the period. Botswana saw a recovery of multinational, B2B, B2G, and mining sector revenues.
However, its increased VAT rate from 12% to 14% and higher fuel tax continued to hurt household income and spending. Namibia saw an increase in government spending during H1 2021, although economic activity in South Africa slowed down slightly in the second quarter of the year as the government initiated strict lockdown measures due to a surge in COVID-19 cases.

In the PC space, Lenovo dominated the Southern Africa market in H1 2021, accounting for 22.7% of total PC shipments for the period, outperforming HP Inc. which had been the market leader in H1 2020. HP Inc. placed second with 19.7% share followed by Dell Technologies with 16.1% market share. Local brand Proline moved up to fourth place with 12.3% share, up from just 1.4% in H1 2020. This strong growth was driven by the large notebook volumes it delivered for the National Student Financial Aid Scheme (NSFAS) education deal in South Africa, resulting in it outperforming international brands like Acer and Asus in terms of market share.

Figure 1
In the tablet category, Samsung continued to dominate the market in H1 2021 with 27.8% share, up 2.1 percentage points on H1 2020. Lenovo placed second with 15.0% share, up 4.6 percentage points on H1 2020, and was followed by Vodacom (11.4%) and Apple (6.6%), which both saw YoY declines in their shares.

Figure 2
"IDC anticipates that the Southern Africa PCD market will grow further in the second half of 2021 as demand for mobile PCs and tablets remains strong across the region, particularly from the education and business sectors," says Fouad Charakla. "Looking at the year as a whole, IDC anticipates the Southern Africa PCD market to grow 19.7% YoY in 2021."

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