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24 July 2013

According to IDC Q2 2013 EMEA PC shipments contract by -22.2% Y-o-Y as high inventory levels and slow consumer demand constrain new purchases by channel partners, and economic pressure affects enterprises.

Shipments total 19.6 million units-- 7.2m desktops (down by -14.6%) and 12.4m portable PCs (-269% decline).

Top 5 Vendors: Europe, Middle East, and Africa (EMEA) PC Shipments*, 2Q13 (Preliminary) (000 Units)

Vendor	2Q13 Shipments	2Q13 Market Share	2Q12 Shipments	2Q12 Market Share	2Q13/2Q12 Growth
Hewlett-Packard	3,723	19.0%	4,847	19.2%	-23.2%
Lenovo	2,622	13.4%	2,204	8.7%	19.0%
Acer Group	2,260	11.5%	3,912	15.5%	-42.2%
Dell	2,092	10.7%	2,300	9.1%	-9.0%
ASUS	1,693	8.6%	2,755	10.9%	-38.5%
Others	7,214	36.8%	9,176	36.4%	-21.4%
Total	**19,604**	**100%**	**25,194**	**100%**	**-22.2%**

Source: IDC EMEA Quarterly PC Tracker, Preliminary Results, 2Q13, July 16, 2013

"Q2 2013 continued to be impacted by large inventory in several countries. April and May were weak as expected as most vendors, retailers, and distributors focused on stock reduction, and while June was supported by starting replenishment ahead of the back to school and product transitions, the volume of new orders remained constrained as caution prevailed in particular in retail," IDC says. "The PC market is going through a major transition with evolving form factors and a larger product portfolio, but the expansion of the overall client device market continues to drive increasing consumer spending and will also support key opportunities for the industry in the commercial space."

W. Europe sees PC shipment declines of 21.2% Y-o-Y, with performance reaching anticipated (read declining) levels across most countries. France is the softest country, with shipments down by -20.9%. Germany follows at -18.7% (impacted by consumer demand slowdown and retail caution), while the UK holds better at -14%.

S. Europe is the most affected region, with Spanish shipments dropping by -43.7% Y-o-Y, and the Nordics also feel the impact of market transition.

CEE and MEA post Q2 2013 declines of -27% and -18% respectively-- larger than expected contractions across both regions. Particularly impacting shipments within MEA are political instability and economic uncertainty, leading to dropping spending across both consumer and enterprise segments in Turkey, Saudi Arabia, S. Africa and the UAE.

Exchange rate depreciation, large held-over channel inventory and new KSA labour laws also negatively affect PC demand, even if tablets remain in demand across both CEE and MEA.

"The evolution of form factors and the change in perception of mobile computing to "always on and always connected" devices, development of social networks and internet infrastructure, are all changing consumer behavior impacting the way PCs are utilized," the analyst continues. "While Windows-based hybrid devices, convertible or ultraslim notebooks with touch capabilities generate a clear interest, sales remain weak. Price remains one of the main inhibitors, and adoption in the commercial space is also slow for cost reasons and due to longer decision-making processes. With more attractive pricing anticipated for the end of year holiday season, however, IDC expects stronger uptake in the ultraslim notebook category in Q4 2013 and into 2014."

In other words tablets are replacing PC in the eyes of consumers (with new CPU platforms failing to impact lighter notebook sales), while enterprise investments are still "very cautious."

When it comes to vendors HP leads EMEA with 19% market share and shipments reaching 3.7m units (-23.2% Y-o-Y decline). Lenovo follows as the only vendor in the top 10 seeing growth (19%), while Acer retains 3rd place despite slow consumer demand and the replacement of the mini-notebook format with tablets.

Dell holds on the 4th place thanks to strong performance in commercial space, and Asus faces a -38.4% Y-o-Y declines due to high inventory and falling consumer interest in notebooks.

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