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22 January 2015

According to IDC EMEA Q4 2014 PC shipments total 25.5 million units with 2% Y-o-Y growth as "strong" holiday season consumer demand helps the market retain positive (if "modest and patchy") results for a 3rd consecutive quarter.

The analyst adds EMEA shipments for overall 2014 are up by 5.5% to 93.3m units.

Top 5 Vendors: Europe, the Middle East, and Africa (EMEA) PC Shipments* 4Q14 (Preliminary) (000 Units)

Vendor	4Q13 Shipments	4Q14 Shipments	4Q13 Share	4Q14 Share	4Q14/4Q13 Growth
HP	5,198	5,952	20.8%	23.3%	14.5%
Lenovo	3,828	5,020	15.3%	19.6%	31.1%
Dell	2,376	2,491	9.5%	9.8%	4.8%
Acer Group	2,552	2,487	10.2%	9.7%	-2.5%
ASUS	2,276	2,201	9.1%	8.6%	-3.3%
Others	8,818	7,399	35.2%	29.0%	-16.1%
Total	**25,048**	**25,549**	**100.0%**	**100.0%**	**2.0%**

Source: IDC EMEA Quarterly PC Tracker, Preliminary Results, 4Q14, January 2015

* PC shipments = desktops and notebooks

W. Europe remains the growth driver for the region, with 10.7% Y-o-Y Q4 2014 shipment growth through "healthy" consumer shipments, while CEE shipments are down by -18.7% Y-o-Y and MEA shows 2.6% Y-o-Y growth. Meanwhile currency fluctuations impact N. Europe, Russia and other CEMA countries, as do an unstable political situation and macroeconomic weaknesses. Either way, the analyst says EMEA dynamics point out a need for renewals in mature markets, as well as the struggles of emerging economies.

As mentioned earlier holiday shipments and post-Christmas promotions underpin W. European growth, particularly in consumer space. France and the UK show "solid" double-digit growth, C. Europe sees 7.9% growth, and S. Europe (Spain, Greece, Portugal and Italy) remains the path to recovery following years of decline. IDC adds EMEA Q4 204 consumer portable PC shipments are up by 18.2% and consumer desktops by 13.2%, while commercial shipments decline by -3.9% even as commercial portable PC shipments grow by 12.6%.

"PC manufacturers prepared very attractive consumer offers this Christmas, with low price points supported by Windows 8.1 with Bing edition, which enticed end users to renew their devices," the analyst says. "With the conditions of the promotion about to change, inventories have been built up this quarter, contributing further to higher levels of stock in the supply chain, which might translate into deceleration in consumer shipments in the first half of 2015. In the commercial segment, the wave of desktop renewals following the end of Windows XP support ended abruptly, while refreshes of portable PCs related to the introduction of Windows 7 four years ago continued and kept the commercial portable market healthy."

In the vendor rankings HP outperforms the Q4 2014 market with 23.3% share and 14.5% Y-o-Y growth through popular products like Stream and convertibles. Lenovo follows as it retains the strongest growth (31.1% Y-o-Y) and "significant" gains in S. Europe.

Third placing Dell also gains market share in Q4 2014 (19.6%, up from 15.3% in Q4 2013), with strong portable PC performance in CEE. Unfavourable Y-o-Y comparisons hurt Acer despite an improvement in desktop shipments, while Asus comes 5th as tablet success appears to cannibalise its portable PC shipments.

Outside the top 5 Apple takes 6th place thanks to stronger consumer demand, Toshiba and Fujitsu continue to focus on the commercial segment at the expense of consumer market loss, and MSI and Wortmann round off 9th and 10th place respectively.

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