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The EMEA PC market continues declining in Q4 2011 according to IDC as PC shipments are down by -6.5% Y-o-Y, the 5th consecutive quarter of decline. As a result total EMEA PC shipments for 2011 are also down, reaching 103M units with a -7% Y-o-Y decline.

"Western Europe remained the most impacted as PC shipments contracted for the fifth consecutive quarter, recording a decline of 11.5%," IDC reports. The region is going through weakness in consumer demand and a slowdown within the commercial segment, as pressure due to the eurozone debt crisis escalates.

Top 5 Vendors: Europe, Middle East, and Africa (EMEA) PC Shipments* 4Q11 (Preliminary) (000 Units)

Vendor	4Q10	4Q11	Share 4Q10	Share 4Q11	4Q11/4Q10 Growth
Hewlett-Packard	6,616	6,031	20.8%	20.2%	-8.8%
Acer Group	4,764	3,602	15.0%	12.1%	-24.4%
Dell	3,150	3,304	9.9%	11.1%	4.9%
ASUS	2,857	3,277	9.0%	11.0%	14.7%
Lenovo	1,791	2,426	5.6%	8.1%	35.5%
Others	12,674	11,147	39.8%	37.4%	-12.1%
Total	**31,852**	**29,786**	**100.0%**	**100.0%**	**-6.5%**

Source: IDC EMEA Quarterly PC Tracker, Preliminary Results, 4Q11, January 17, 2012

*PC shipments = desktop and notebooks.

According to the analyst, consumer demand is down by -16.1% while the commercial market "returned to negative" (following growth in Q3) by -5.2%.

The SMB segment is hit particularly hard, due to weak local demand and lack of access to credit. The public sector is also under budget cut and austerity measure pressure, while enterprise fares somewhat better through ongoing hardware renewals.

PCs are also under increasing competition from other devices-- tablets continue enjoying strong demand during Q4 2011, while portable shipments drop by -15.4% Y-o-Y. Mini-notebooks see a particularly sharp drop of -48.4% in sales, while mainstream notebooks decline by -3.1%.

"Fearing weak consumer sales at Christmas and slowing commercial demand, retailers and distributors across the region remained cautious when taking new orders," IDC says.

HDD shortages have "limited impact" on Q4 2011 totals, as volumes on sale in the pre-Christmas period (using HDD inventory manufactured before the Thailand floodings) ship by sea by mid-November.

The CEMA PC market fares better in Q4-- growing by 1.3% Y-o-Y, in spite of political instability in some Middle East and African countries, the financial crisis in Europe and HDD shortages, the analyst says.

When it comes to vendors, HP remains on top even if it sees declines of -8.8% Y-o-Y as Q4 shipments total 6.03M units. Acer comes 2nd, with shipments reaching 3.6M units and a decline of -24.4% Y-o-Y. IDC says Acer managed to return inventory levels to "manageable levels" across most countries, but continues to alienate its channel partners.

Dell takes 3rd place, growing by 4.9% Y-o-Y with shipments reaching 3.15M units through strong growth thanks to MEA public sector deals. Asus drops to 4th place, even if it shows 14.7% Y-o-Y growth.

Lenovo reports strong 35.5% Y-o-Y growth in Q4 2011, benefitting from its Medion acquisition in consumer space.

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