

## Gartner: W. European PC Market Continues to Shrink

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"Continued to shrink, declining faster than expected," Gartner remarks on the state of W. European Q3 2013 PC market-- shipments are down by -12.8% Y-o-Y to reach 11.9m units, with declines across all segments and regions.

The reason for such results, of course, is the transition from PCs to tablets. Also to blame is careful inventory management, Windows 8.1 launch preparations and product transitions to Haswell and Bay Trail processors.

### Western Europe: PC Vendor Unit Shipment Estimates for 3Q13 (Thousands of Units)

Vendor	3Q13 Shipments	3Q13 Market Share (%)	3Q12 Shipments	3Q12 Market Share (%)	3Q12-3Q13 Growth (%)
HP	2,618	22.1	2,622	19.3	-0.2
Lenovo	1,471	12.4	1,265	9.3	16.3
Acer Group	1,382	11.7	1,920	14.1	-28.0
Dell	1,218	10.3	1,204	8.9	1.1
Apple	996	8.4	1,028	7.6	-3.1
Others	4,174	35.1	5,556	40.8	-24.8
<b>Total</b>	<b>11,859</b>	<b>100.0</b>	<b>13,595</b>	<b>100.0</b>	<b>-12.8</b>

Note: Data includes desk-based PCs, mobile PCs and x86 tablets equipped with Windows 8; it excludes Chromebooks and other tablets.

Source: Gartner (November 2013)

Mobile PC shipments drop by -14.5% Y-o-Y, while desktops drop by -9.8%. The professional shipment sees shipments dropping by -8.3% and the consumer market by -17.1%.

"Most PC vendors have shifted their investment from consumer PCs to tablets and hybrid form factors," the analyst continues. "The challenge they face is to protect their current PC market positions while competing in an aggressive and fast-moving alternative mobile device market. Without a solid position in the professional PC market, they will find it challenging to defend their positions and invest in non-PC devices."

In the vendor rankings, HP remains on top with flat Y-o-Y results. Lenovo follows with 16.3% Y-o-Y growth driven by strong mobile PC sales in the consumer and SMB segments. Acer shipments decline by -28% Y-o-Y due to consumer preference for tablets, while Dell expands within the business PC segment and sees 1.1% Y-o-Y shipment growth.

Apple makes a top 5 debut, replacing a heavily hit (-35% Y-o-Y shipment decline) Asus.

The UK sees the greatest decline-- 21.2% Y-o-Y on shipments reaching 2.3m units, weakness Gartner predicts will continue at least throughout Q4 2013. The UK consumer market is down by -13.6%, while the professional market drops by -28.1%.

"New hybrid PC and tablet products are expected to raise the interest of consumers, but spending on these products is likely to be limited as they will be competing against inexpensive tablets," the analyst says.

French Q3 2013 PC shipments also total 2.3m units, if with -10.4% Y-o-Y drop, making Q3 the 5th consecutive quarter of decline. Such weakness is less severe than either the UK or Germany, but product transitions and inventory clean-ups equally contribute to the slowdown.

And finally PC shipments in Germany reach 2.3m with -14.4% Y-o-Y decline. Gartner reports careful inventory management led to sale improvements over Q2 2013, but consumer and professional PC shipments are still down by -21% and 8% respectively.

"We expect to see some attractive new PCs in the stores in Q4 2013, running Windows 8.1, with thinner form factors and longer battery life enabled by Intel's Haswell processors," the analyst concludes. "These PCs will compete with high-end tablets and be complemented by a new generation of Atom-based devices that will compete with low-end tablets. Although this will not fully compensate for the PC's overall decline, it represents an opportunity for profit in the

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midrange and higher-end PC segments."

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