Once again the two major analysts agree on a topic close to our hearts-- EMEA PC shipment continue falling during Q4 2013. Gartner says the decline is "less steep" at -6.7% Y-o-Y, while IDC describes shipments as "constrained."

According to Gartner EMEA Q4 2013 shipments total 25.8 million units with shipment declines across all regions, if less so than the last 7 quarters.

Preliminary EMEA PC Vendor Unit Shipment Estimates for 4Q13 (Units)

Company	4Q13 Shipments	4Q13 Market Share (%)	4Q12 Shipments	4Q12 Market Share (%)	4Q13-4Q12 Growth (%)
HP	5,096,395	19.7	5,346,902	19.3	-4.7
Lenovo	3,819,979	14.8	3,088,862	11.1	23.7
Acer Group	2,763,858	10.7	3,002,467	10.8	-7.9
Asus	2,400,000	9.3	2,794,279	10.1	-14.1
Dell	2,354,254	9.1	2,351,993	8.5	0.1
Others	9,429,544	36.5	11,129,981	40.2	-15.3
Total	**25,864,030**	**100.0**	**27,714,484**	**100.0**	**-6.7**

Note: Data includes desk-based PCs and mobile PCs, including x86 tablets equipped with Windows 8, but excludes Chromebooks and other tablets. All data is estimated based on a preliminary study. Final estimates will be subject to change. The statistics are based on the shipments selling into channels.

Source: Gartner (January 2014)

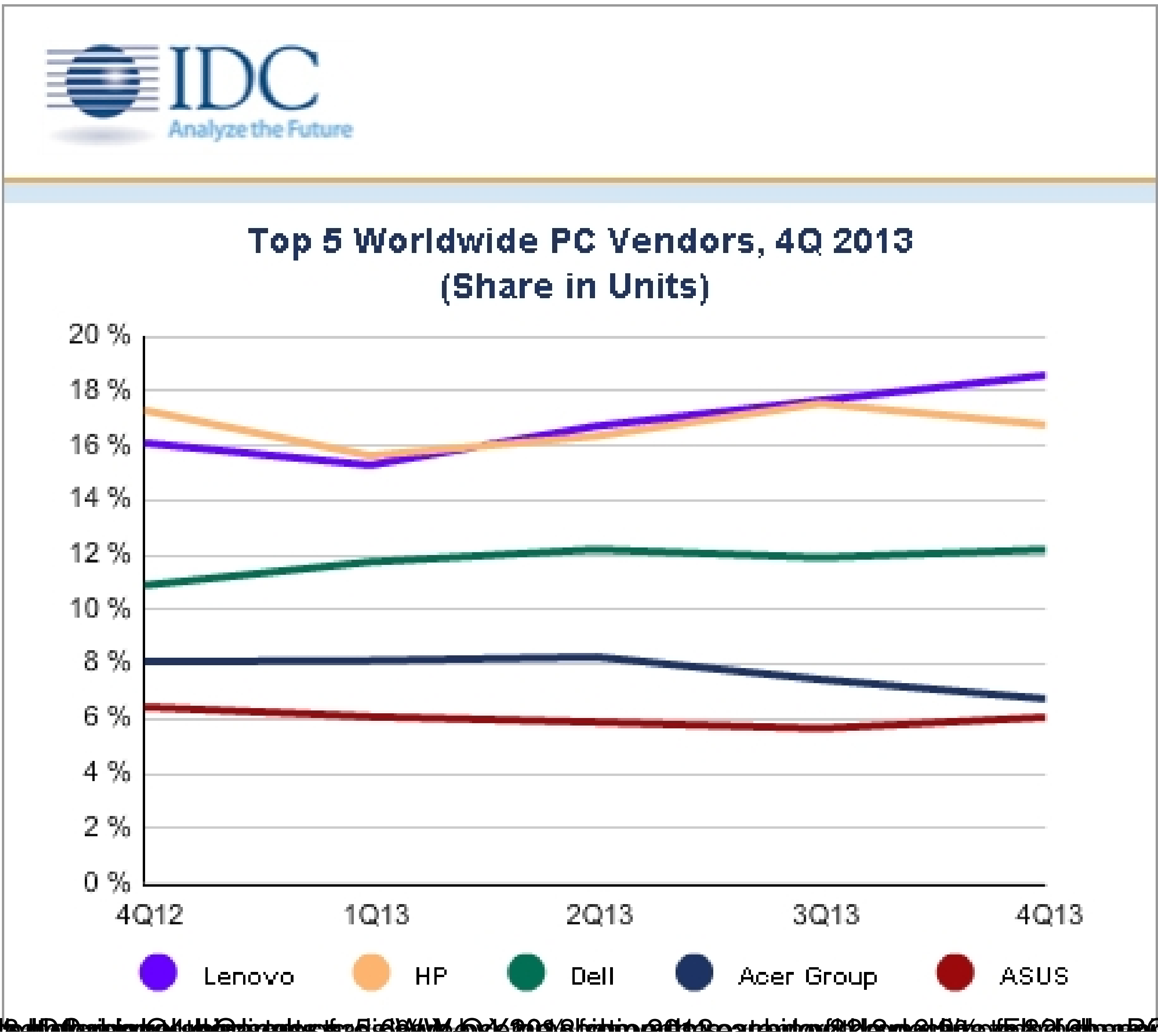
Consumers continue replacing PCs only on a "needed basis," since new form factors suffer from either limited availability or higher than average prices. On the other hand tablets, especially Androids, make popular, attractively priced, holiday presents.

"In E. Europe, the decline has slowed to single-digit numbers in most countries, where shipments were driven by the professional PC segment," the analyst says. "The strength of the consumer mobile PC segment was mostly apparent in W. Europe, whereas in E. Europe the declining prices of Android tablets made them the preferred choice of Christmas present for consumers over PCs."

HP remains top vendor with 19.7% Q4 2013 market share despite shipments falling by -4.7% Y-o-Y. Lenovo follows as the only vendor seeing growth (23.7% Y-o-Y) thanks to popular ultramobile products, followed by Acer with 10.7% market share.

Despite Q-o-Q growth of 28% through high Transformer Book T100 demand 4th placing Asus shipments still decline by -14.1% on a Y-o-Y basis. In 5th place is Dell with flat (0.1% Y-o-Y) shipments.

IDC is still to release in-depth EMEA analysis, but its description of EMEA Q4 2014 shipments is "constrained." Enterprise shipments are relatively strong thanks to year-end budget spending, but soft shipments and weak demand lead to a "much more depressed" consumer market.



Preliminary Worldwide PC Vendor Unit Shipment Estimates for 2013 (Units)

Company	2013 Shipments	2013 Market Share (%)	2012 Shipments	2012 Market Share (%)	2013-2012 Growth (%)
Lenovo	53,272,522	16.9	52,187,653	14.9	2.1
HP	51,252,229	16.2	56,505,757	16.1	-9.3
Dell	36,788,285	11.6	37,611,247	10.7	-2.2
Acer Group	25,689,496	8.1	35,745,401	10.2	-28.1
Asus	20,030,837	6.3	24,339,951	6.9	-17.7
Others	128,934,147	40.8	144,669,689	41.2	-10.9
Grand Total	**315,967,516**	**100.0**	**351,059,698**	**100.0**	**-10.0**

Note: Data includes desk-based PCs and mobile PCs, including mini-notebooks but not media tablets such as the iPad. Data is based on the shipments selling into channels.

Source: Gartner (January 2014)