The traditional PC market (desktops, notebooks and workstations) continues to stabilise in Q1 2017, IDC reports-- shipments show "modest" 1.6% Y-o-Y growth, reaching 17.4 million units.

Top 5 Vendors: Europe, the Middle East, and Africa (EMEA) Traditional PC Shipments*

2017Q1 (Preliminary) (000 Units)

Vendor	2016Q1 Shipments	2017Q1 Shipments	2016Q1 Share	2017Q1 Share	YoY Growth
HP Inc.	4,288	4,478	25.0%	25.7%	4.4%
Lenovo	3,539	3,587	20.7%	20.6%	1.4%
Dell	1,900	2,086	11.1%	12.0%	9.8%
Acer Group	1,258	1,699	7.3%	9.8%	35.1%
ASUS	1,712	1,617	10.0%	9.3%	-5.6%
Others	4,436	3,939	25.9%	22.6%	-11.2%
Total	**17,133**	**17,406**	**100.0%**	**100.0%**	**1.6%**

Source: *IDC EMEA Quarterly PCD Tracker*, Preliminary Results, 2017Q1, April 2017

Notebooks show the strongest performance, growing by 8.9% Y-o-Y across EMEA with 9.2% growth in W. Europe and 8.3% in CEMA. Commercial notebooks are up by 18.6% in CEMA and 11.2% in W. Europe, the result of a push to avoid price increases and favourable exchange rates against the dollar, while consumer notebooks are up by 8.1% in CEMA and 7.5% in W. Europe thanks to previous quarter backlogs.

Desktop shipments are still on the decline however, as EMEA shipments are down by -12% Y-o-Y.

"The return to positive territory shows a clear stabilization of the traditional PC market in EMEA. Memory and SSD shortages caused backlogs last year and some shipments could not be fulfilled earlier than Q1 2017," the analyst says. "In addition, the channel anticipated demand and increased its stock intake ahead of further device price hikes."

W. Europe has a highly fragmented PC market-- overall shipments are up by 3.1%, with French and German shipments growing by 8.2% and 5.8% Y-o-Y respectively while the UK remains in negative territory (-7.9%). S. European economies such as Italy (-2.6%) and Spain (-2.8%) are on the way to stabilisation, and an improved economic outlook has boosted IT investment in many countries.

"In Q1 2017 the traditional PC market reported healthy annual growth of 4.5% in the CEE region," IDC adds. "The market was driven by notebooks recording an overall growth of 11.7% YoY. Both consumer and especially commercial segments increased, despite inventories built up at the end of 2016 due to an expected rise in component ASPs. The market was boosted by healthy growth on the back of a depressed Q1 2016 result, some backlog from the previous quarter, further recovery in the eastern CEE region, and stabilisation in exchange rates for local currencies against the dollar."

In the vendor rankings, the top 5 players account for 77.4% of the Q1 2017 market, compared with the 74.1% of Q1 2016. HP continues to lead, with 25.7% share and 4.4% Y-o-Y growth, with gains in consumer notebook space. Lenovo follows with 20.6% share and 1.4% Y-o-Y growth driven by double-digit commercial notebook growth, and 3rd placing Dell posts solid 9.8% growth and increased market share (12%), also thanks to strong commercial notebook results.

Acer shows the most dramatic growth at 35.1% Y-o-Y after a challenging Q1 2016. In 5th place is Asus, who faced challenges related to competitive notebook pricing and inventory, even if it managed to consolidate its position in MEA consumer space.

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