

IDC: Win 10 Transition Keeps EMEA PCs Positive

Written by Frederick Douglas
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EMEA traditional PC (combining desktops, notebooks and workstations) shipments total 71.7 million units in 2019, IDC reports-- a 0.2% increase brought about by a strong pipeline of deals ahead on Windows 7 end of support.

According to the analyst, while slow demand and high inventory continue to affect the consumer market, the Windows 10 refresh of the commercial market should be sufficient to offset an overall negative trend. W. Europe continues to drive the market in 2019, but CEE is set to pick up the pace in 2020 and continue growing through to 2023. MEA should be soft in 2020, before gaining stability until 2023.

EMEA Traditional PC Forecast by Product

2019Q2 Forecast for 2019 to 2023 (Shipments in Thousands)

Product	2019 Shipments*	2019 Share*	2023 Shipments*	2023 Share*	2019-2023 CAGR*
Traditional NB	22,643	32.3%	16,496	25.4%	-7.6%
Ultraslim NB	20,040	28.6%	23,509	36.3%	4.1%
Convertible NB	4,636	6.6%	6,205	9.6%	7.6%
Traditional DT	19,435	27.7%	14,870	22.9%	-6.5%
All in one DT	3,295	4.7%	3,774	5.8%	3.4%
Total	70,049	100.0%	64,853	100.0%	-1.9%

Source: IDC Worldwide Quarterly Personal Computing Device Tracker, May 22nd, 2019. *Forecast data

"The Western PC market gained further momentum in Q2 2019, primarily boosted by the Windows 10 transition in the commercial segment," IDC says. "Despite CPU shortages constraining the supply chain, efficient planning by OEMs toward order fulfillment supported strong results across both the private and public segments. The outlook for 2019H2 remains strong as demand is expected to strengthen from the SMB space, supported by large and very large businesses as Windows 7 nears end of life."

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The impact of component shortages is shifting from desktops to notebooks, particularly through end-of-life CPUs such as Kaby Lake R. This is likely to delay fulfillment of deals, but macroeconomic factors, component shortages and major political events of the Brexit variety are either triggering early pull-ins or accelerating IT investments, contributing to a brighter picture for the commercial market, at least in the near future.

The same cannot be said of the consumer market, as high channel inventory affects shipments. Overall demand shows no sign of "significant" improvement in the coming quarters. Desktops continue to lose share as consumers increasingly shift demand towards mobile devices. Meanwhile higher inventory negatively impacts the sell-in volume of notebooks in Q3 2019. Furthermore, anticipated component price drops have been impacted by trade turbulence in key geographies, and will not help drive consumer growth as a result. That said, the "usual suspects"-- premium, thin and light, and gaming devices-- should help bring growth in a struggling market.

IDC has revised its CEE H2 2019 forecast downward to -7.1% Y-o-Y due to weak demand in consumer space, while the MEA forecast has been revised "slightly" downward due to a lack of consumer investments in new PCs. The analyst says the MEA PC market will grow by 3.7% Y-o-Y in Q3 2019 thanks to "good" recovery in commercial space, the result of economic recovery across the region and Turkey returning to growth.

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