

IDC: EMEA PC Market "Not Rocked" by Coronavirus

Written by Marco Attard
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As coronavirus (aka Covid-19) concerns spread across the world in a very much viral fashion, IDC reports the virus will leave an impact on the W. European PC market in 2020, but not as much as the ongoing stagnation of the consumer segment.

EMEA Traditional PC Forecast by Product

4Q19 Forecast for 2020 to 2024 (Shipments in Thousands)

Product	2020 Shipments*	2020 Share*	2024 Shipments*	2024 Share*	2020-2024 CAGR*
Traditional NB	20,214	28.7%	15,486	23.1%	-6.4%
Ultrastim NB	22,723	32.3%	25,780	38.4%	3.2%
Convertible NB	5,385	7.7%	6,564	9.8%	5.1%
Traditional DT	18,706	26.6%	15,793	23.5%	-4.1%
All-in-one DT	3,355	4.8%	3,514	5.2%	1.2%
Total	70,384	100.0%	67,137	100.0%	-1.2%

Source: IDC Worldwide Quarterly Personal Computing Device Tracker, February 19, 2020. *Forecast data

The analyst predicts traditional PC-- desktops, notebooks and workstations-- shipments will total 72.2 million in 2020, a -1% decline. The remaining Windows 10 transitions should continue driving commercial demand, but as mentioned earlier the consumer segment remains very much stagnant, and negative supply chain ramifications will keep the PC market in negative territory. H1 2020 should be better than H2, with overall 1.6% Y-o-Y growth expected for Q1 2020 and flat performance for Q2 2020.

The coronavirus will particularly hit notebooks, since a high concentration of manufacturing takes place in the affected areas of mainland China. However healthy inventory levels and the prioritisation of Windows 10 transitions mean the strong demand in public and SMB space will be "largely" met in H1 2020. Commercial appetite for desktops is currently stronger than anticipated, particularly for smaller form factor machines, driving overall commercial growth in the first 3 quarters of 2020.

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The same cannot be said for the consumer market, as the outlook remains soft until Q4 2020. Desktops continue to lose share to more mobile counterparts, and further compounding such decline are comparatively lengthy product lifecycles and an anticipated gradual slowdown in gaming demand. Meanwhile economic and political turbulence in some key geographies will negatively impact consumer notebook demand, limiting growth to just 1% Y-o-Y in both Q1 and Q2 2020.

IDC has only "slightly" revised H1 2020 PC forecasts for CEE and MEA, but a possible supply shortage can lead to an increase in sales price. Thus, the CEE region forecast should maintain the same volume in Q1 2020 as the previous decline, before dropping by -2.7% for full year 2020. Meanwhile the overall MEA PC market will decline by -0.7% in Q1 2020 before the full year ends with a -1.1% drop, since the commercial segment will not manage to offset weak consumer demand.

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