

## Gartner: Q3 2011 EMEA Market Remains Weak

Written by Marco Attard  
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EMEA PC shipments total 26.6M units in Q3 2011 according to Gartner-- a -2.9% Y-o-Y decline, the 3rd consecutive decline for the market.

Consumer demand remains weak in, with lower sell-in to the channel.

Gartner says Q-o-Q growth provides a better picture of the market due to the current uncertain environment-- in which case the market shows 17.1% Q-o-Q growth, higher than seasonally expected and a sign of potential stability after 4 weak quarters.

The Gartner totals include desk-based and mobile PCs (including mini-notebooks) but not tablets.

### Preliminary EMEA PC Vendor Unit Shipment Estimates for 3Q11 (Units)

| Company      | 3Q11 Shipments | 3Q11 Market Share (%) | 3Q10 Shipments | 3Q10 Market Share (%) | 3Q10-3Q11 Growth (%) |
|--------------|----------------|-----------------------|----------------|-----------------------|----------------------|
| HP           | 5,355          | 20.1                  | 5,206          | 19.0                  | 2.9                  |
| Acer Group   | 3,615          | 13.6                  | 5,955          | 21.7                  | -39.3                |
| Asus         | 2,686          | 10.1                  | 2,370          | 8.7                   | 13.3                 |
| Dell         | 2,390          | 9.0                   | 2,450          | 8.9                   | -2.4                 |
| Lenovo       | 1,971          | 7.4                   | 1,612          | 5.9                   | 22.2                 |
| Others       | 10,574         | 39.8                  | 9,799          | 35.8                  | 7.9                  |
| <b>Total</b> | <b>26,591</b>  | <b>100.0</b>          | <b>27,393</b>  | <b>100.0</b>          | <b>-2.9</b>          |

Note: Data includes desk-based PCs, mobile PCs, including mini-notebooks but not media tablets such as the iPad. Final estimates will be subject to change. Lenovo shipments include NEC shipments, but not Medion's shipments.  
Source: Gartner (October 2011)

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Acer keeps on pulling the market average down-- "The impact on the market of Acer's difficulties is clear," Gartner says, as Acer continues suffering from poor performance and prolonged inventory clearance, declining by -39.3% Y-o-Y and holding 13.6% share of the Q3 2011 market.

HP beats Acer and becomes top EMEA PC vendor, with 20.1% market share and shipments totalling 5.3M with 2.9% Y-o-Y growth. Gartner remarks "HP managed the impact of separating its PC division better than we had expected."

Asus overtakes Dell to 3rd place, with shipments totalling 3.6M (with 13.3% Y-o-Y growth) thanks to increased mobile PC sales in both consumer and SMB markets. Dell follows with 7.4% market share, shipments totalling 2.4M units and declines of -2.4% Y-o-Y.

Lenovo is 5th with strong performance in both enterprise and consumer markets, growing by 22.2% Y-o-Y with shipments reaching 2M units.

Gartner concludes many PC vendors were hoping tablet shipments would boost their H2 2011 growth-- but with the collapse of non-Apple tablet market, most are going back to pushing PCs to retailers. However retailers remain cautious, shortening order lead times and passing more costs to PC vendors in a period where margins are under pressure.

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