

Gartner Says Western Europe PC Market Grew 4 Per Cent in Fourth Quarter 2009

- *Apple Made Its Debut Among Top Five Vendors in France*
- *Acer Moved to No. 1 Position in Western Europe and Three Major Countries in Europe*

Egham, UK, 17 February 2010 - PC shipments in Western Europe totalled 20.2 million units in the fourth quarter of 2009, an increase of 4 per cent from the same period in 2008, according to Gartner, Inc. In 2009, PC shipments reached 64.8 million units in Western Europe, representing flat unit growth from 2008.

“For the first time in 2009, it was in the fourth quarter that we saw the three major countries in Western Europe posted growth,” said Ranjit Atwal, principal analyst at Gartner, based in the UK. “The Western European PC market performed better than expected. Despite the tough economic conditions the consumer PC market provided vendors with a source of growth. The vendors that were able to execute their strategy clearly benefited from the consumers’ propensity to purchase PCs.”

Acer moved to the No. 1 position achieving 33.9 per cent growth in the fourth quarter of 2009 (see Table 1). “Outside the top five vendors, we saw Apple, Samsung, Lenovo and Sony post significant growth compared to a year ago. Collectively, these vendors are increasing share and putting considerable competitive pressure on the top five vendors,” said Mr Atwal.

While 2009 was underpinned by the consumer PC market, Gartner expects a resurgence of the professional PC market to bolster the PC market in 2010. “Windows 7 migration will act as the catalyst for replacement activity in the professional PC market in 2010,” said Mr Atwal.

Table 1
Western Europe PC Vendor Unit Shipment Estimates for 4Q09 (Thousands of Units)

Company	4Q09 Shipments	4Q09 Market Share (%)	4Q08 Shipments	4Q08 Market Share (%)	4Q09-4Q08 Growth (%)
Acer	4,673	23.1	3,490	17.9	33.9
HP	4,311	21.3	4,658	23.9	-7.5
Dell	2,004	9.9	2,032	10.4	-1.4
Asus	1,631	8.0	1,490	7.6	9.4
Toshiba	1,259	6.2	1,277	6.6	-1.4
Others	6,387	31.5	6,539	33.6	-2.3
Total	20,265	100.0	19,486	100.0	4.0

Note: Data includes desk-based PCs and mobile PCs
Source: Gartner (January 2010)

UK: PC Market Saw Growth in Fourth Quarter 2009 for the First Time in a Year

PC shipments in the UK totalled 3.8 million units in the fourth quarter of 2009, an increase of 3.3 per cent compared with the same period in 2008 (see Table 2). In 2009, PC shipments reached 12.5 million units in the UK, representing a 3 per cent decline from 2008.

“The UK PC market showed growth in the fourth quarter of 2009 for the first time in the year,” said Mr Atwal. “The PC market in the UK has also become heavily dependent on mobile PCs as they accounted for 70 per cent of the total PC market. The consumer mobile PC market continued to dominate the market with growth reaching 24 per cent in the fourth quarter of 2009. The continued uptake of mini-notebooks has been the driving force providing an ideal platform at the lower price point for the consumer.”

The professional PC market remained weak declining 25 per cent in the fourth quarter of 2009. “It will be the last segment to recover,” said Mr Atwal. “However, we should expect demand for Windows 7 to capitalise as its migrations start in 2010.”

In the fourth quarter of 2009, Acer moved to the No. 1 position growing 32.2 per cent while HP and Dell exhibited a 7.1 per cent decline each. Samsung closed the gap with Toshiba with an increase of 3.1 percentage points in market share year-on-year. Samsung’s performance was the result of strong demand in both its mini-notebooks and competitively priced main-stream notebooks.

Table 2

United Kingdom PC Vendor Unit Shipment Estimates for 4Q09 (Thousands of Units)

Company	4Q09 Shipments	4Q09 Market Share (%)	4Q08 Shipments	4Q08 Market Share (%)	4Q09-4Q08 Growth (%)
Acer	721	19.1	545	15.0	32.2
HP	712	18.9	766	21.0	-7.1
Dell	620	16.5	667	18.3	-7.1
Toshiba	391	10.4	385	10.6	1.5
Samsung Electronics	244	6.5	123	3.4	98.2
Others	1,079	28.6	1,157	31.7	-6.7
Total	3,766	100.0	3,644	100.0	3.3

Note: Data includes desk-based PCs and mobile PCs
Source: Gartner (January 2010)

France: Apple Made Its Debut Among the Top Five

PC shipments in France totalled 3.3 million units in the fourth quarter of 2009, an increase of 4.5 per cent compared with the same period in 2008 (see Table 3). In 2009, PC shipments reached 10.8 million units in France, a 1.7 per cent increase from 2008.

“The fourth quarter showed the strongest PC growth in France last year,” said Isabelle Durand, principal analyst at Gartner, based in France.

The mobile PC market accounted for 64 per cent of total PC shipments in the fourth quarter of 2009, with volumes increasing 8 per cent year-on-year. Deskbound PCs declined 1 per cent despite high demand on all-in-one desktop models.

“In the fourth quarter of 2009, the consumer PC market remained buoyant with 15 per cent growth year-on-year. This market was driven by strong mini-notebook demand and large number of vendors increased their mini-notebooks shipments during the quarter,” said Ms Durand. Gartner estimates that of all mobile PCs shipped 20 per cent were mini-notebooks in the fourth quarter of 2009.

The professional PC market declined 10 per cent in the fourth quarter of 2009. The demand from businesses remained weak due to IT budget reductions and ongoing extension of desktop PC life cycles. The decline in the professional desktop PC market will continue through most of 2010 as adoption of Windows 7 deployments in this market will not start before the end of 2010.

In the fourth quarter 2009, Acer moved to the No. 1 position reaching 24.7 per cent of market share and growing 16 per cent. Its performance was the result of aggressive pricing on both low-end notebooks and mini-notebooks. Asus exhibited the second highest year-on-year growth, and it shipped more standard notebooks than mini-notebooks in the fourth quarter.

Apple made its debut among the top five PC vendors displacing Toshiba. Apple performed well in the mobile PC market despite the company's decision not to enter the mini-notebook market. Apple refreshed its iMac and Mac Mini lines which bolstered desktop PC sales during the quarter.

"Increased competition in the mobile PC space is expected in 2010, with the prospect of affordable ultra-thin and -light notebooks, and new tablet PCs," said Ms Durand.

Table 3

France PC Vendor Unit Shipment Estimates for 4Q09 (Thousands of Units)

Company	4Q09 Shipments	4Q09 Market Share (%)	4Q08 Shipments	4Q08 Market Share (%)	4Q09-4Q08 Growth (%)
Acer	814	24.7	702	22.2	16.0
HP	807	24.4	787	24.9	2.5
Dell	344	10.4	330	10.4	4.3
Asus	336	10.2	264	8.3	27.6
Apple Computer	182	5.5	127	4.0	43.5
Others	819	24.8	953	30.1	-14.0
Total	3,303	100.0	3,162	100.0	4.5

Note: Data includes desk-based PCs and mobile PCs
Source: Gartner (January 2010)

Germany: PC Market Returned to Growth and Acer Moved to No. 1 Position in Fourth Quarter 2009

PC shipments in Germany totalled 4.2 million units in the fourth quarter of 2009, an increase of 9.9 per cent compared with the same period in 2008 (see Table 4). In 2009, PC shipments reached 12.7 million units in Germany, representing a 4.2 per cent growth from 2008.

"Despite increasing PC volumes, the market in Germany continued to suffer from decreasing revenue streams," said Meike Escherich, principal analyst at Gartner, based in the UK. "End-user spending in 2009 declined 10 per cent compared to last year. If this trend persists, this will lead to further consolidation in the PC market in Germany."

In the fourth quarter of 2009, the mobile PC market saw an increase of 12 per cent year-on-year. For the first time in the year, desktop demand increased during the quarter by 6 per cent. The professional segment showed slight signs of recovery with a decline of 5 per cent year-on-year.

The demand from the consumer sector remained strong. Driven by the mini-notebook segment, it exhibited an increase of 12 per cent in the fourth quarter of 2009. This trend continued to be reflected in vendor performances. In the fourth quarter of 2009, every third mobile PC purchased by a household was a mini-notebook. Acer and Asus especially profited from this trend.

Acer moved to the No. 1 position in the fourth quarter of 2009 as a result of low-priced mainstream notebooks and strong performance in the mini-notebooks segment, where sales reached more than 100 per cent growth in the fourth quarter of 2009.

HP, ranked in the No. 2 position, saw a 13 per cent decline in the fourth quarter of 2009. HP's poor performance was due to weak demand in the mobile PC market. Although it maintained its lead in the desktop segment, in the professional market, its growth was 8 percentage points behind the overall average market. "This could change towards the second half of 2010, as large organisations return to invest, which should help HP regain market share," said Ms Escherich.

Ms Escherich concluded: "2010 could turn out to be the year for the PC industry. All-in-one desktops with touchscreen, mini-notebooks, affordable ultra-thin and -light notebooks, and the new tablet PCs should help re-invigorate buyers' interest in PCs."

Table 4
Germany PC Vendor Unit Shipment Estimates for 4Q09 (Thousands of Units)

Company	4Q09 Shipments	4Q09 Market Share (%)	4Q08 Shipments	4Q08 Market Share (%)	4Q09-4Q08 Growth (%)
Acer	808	19.4	432	11.4	87.1
HP	462	11.1	531	14.0	-13.0
Asus	414	9.9	308	8.1	34.6
Dell	354	8.5	319	8.4	10.7
Medion	325	7.8	320	8.4	1.6
Others	1,801	43.3	1,880	49.7	-4.2
Total	4,164	100.0	3,790	100.0	9.9

Note: Data includes desk-based PCs and mobile PCs
Source: Gartner (January 2010)

About Gartner

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