

Canalys: Worldwide PC market bounces back with 9% growth in Q2 2020

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Friday, 10 July 2020

The worldwide PC market enjoyed a stellar recovery in Q2 2020, as supply issues eased to meet the massive pent-up demand from the first three months of the year. Total shipments of desktops, notebooks and workstations hit 72.9 million units, up 9% from a year ago. This has more than made up for the fall in Q1 2020, as total shipments for the first half of 2020 were up 1% over the first half of 2019. The rebound was driven by notebooks, which have become of vital importance to businesses, students and consumers as they adjust to the new work and life realities caused by the coronavirus pandemic. Shipments of notebooks and mobile workstations grew 24% year on year, while shipments of desktops and desktop workstations fell by 26%.

After losing ground in Q1, HP regained share, unseating Lenovo to become the best-performing vendor, as it shipped a record 18.1 million client PCs. The US-based vendor grew 18% over Q2 2019, with excellent results in the US and EMEA. Lenovo slipped to second, with 17.4 million units and 7% growth, while Dell gained momentum from a resilient Q1 to grow 3% for shipments of 12.0 million units. Apple and Acer rounded out the top five, growing 13% and 21% respectively.

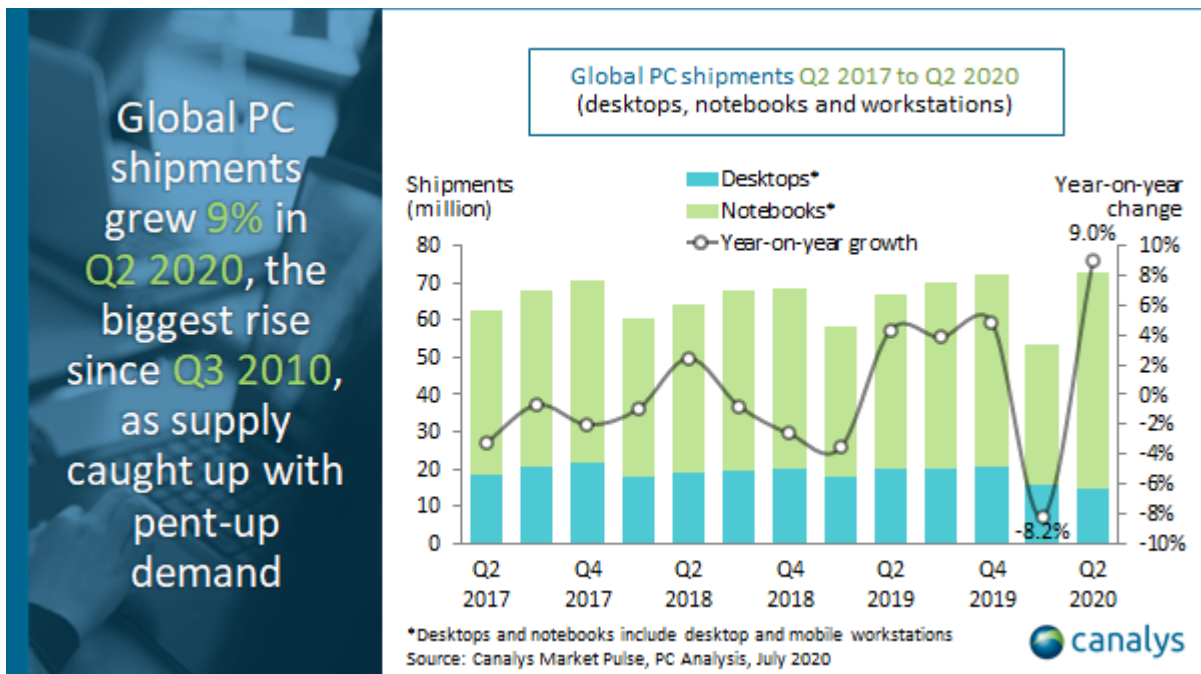
Worldwide desktop, notebook and workstation shipments (market share and annual growth) Canalys PC Market Pulse Q2 2020

| Vendor (company) | Q2 2020 shipments | Q2 2020 market share | Q2 2019 shipments | Q2 2019 market share | Annual growth |
|------------------|-------------------|----------------------|-------------------|----------------------|---------------|
| HP | 18,082 | 24.8% | 15,386 | 23.0% | 17.5% |
| Lenovo | 17,411 | 23.9% | 16,271 | 24.3% | 7.0% |
| Dell | 12,011 | 16.5% | 11,615 | 17.4% | 3.4% |
| Apple | 5,351 | 7.3% | 4,729 | 7.1% | 13.1% |
| Acer | 4,991 | 6.8% | 4,125 | 6.2% | 21.0% |
| Others | 15,076 | 20.7% | 14,771 | 22.1% | 2.1% |
| Total | 72,922 | 100.0% | 66,897 | 100.0% | 9.0% |

Note: Unit shipments in thousands. Percentages may not add up to 100% due to rounding.

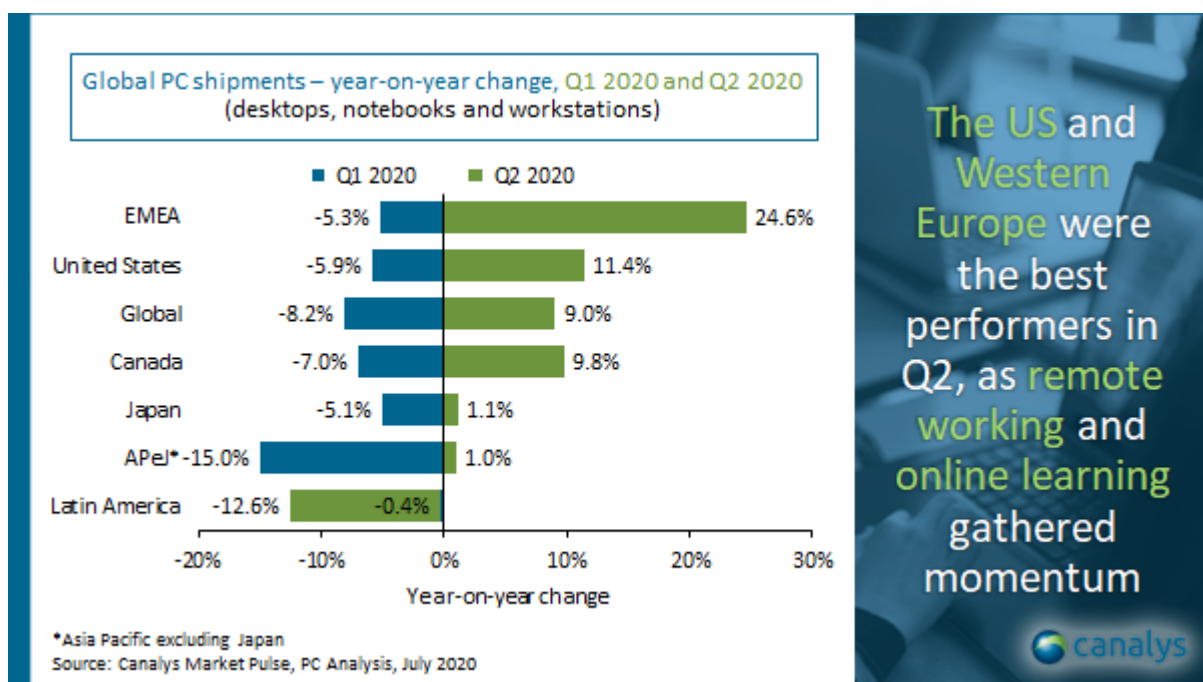
Source: Canalys PC Analysis (sell-in shipments), July 2020

“Notebooks have singlehandedly pulled the PC market out of depression,” said Rushabh Doshi, Research Director at Canalys. “They have been crucial in ensuring that the service, government and education sectors can continue to function in the face of unprecedented disruption and uncertainty. Vendors and the channel made the necessary changes to ramp up production and delivery of notebooks to the highest level in years.” Canalys expects the importance of notebooks to grow as the PC ecosystem makes investments in the category. “The extraordinary demand has driven shifts in strategy across the industry. Chrome OS and AMD are making inroads into the commercial sector, while Apple MacBooks now run on ARM chips,” added Doshi. “After years of smartphone-centered innovation, application developers, too, are turning their attention to the PC, where productivity and performance take precedence.”



“From a regional perspective, North America and EMEA grew the most in Q2, with shipments up 11% and 25% respectively,” said Ishan Dutt, Analyst at Canalys. “These markets were well equipped to handle large transitions to remote work and learning, and will see these trends

extend beyond the end of the COVID-19 pandemic. Additionally, the easing of lockdown restrictions led to a bump in employment and business activity in Q2. The extent of the PC market rebound in Q2 in these regions means shipments in the first half of 2020 were higher than they were at the same point last year. Conversely, Latin America, which has suffered a worsening situation, saw shipments fall 13% year on year. PC market recovery in the region will be delayed as businesses and price-sensitive consumers prioritize other spending during the economic downturn. Local manufacturing and distribution also face prolonged disruption as lockdown measures ramp up. In Asia Pacific, the Q2 shipment bump was not large enough to counter the shortfall in Q1. Greater barriers to implementing working and learning from home, and the mobile-first culture in parts of the region meant notebook demand did not see a huge spike in growth.”



Note: tablets (slates and detachables) are not addressed in this press release. Chromebooks are included as a subset of notebooks.

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