



Middle East & Africa Personal Computing Devices Market Continues to Decline but Growing Corporate Demand is Poised to Spur Growth

Dubai – The Middle East and Africa (MEA) personal computing devices (PCD) market, which is made up of desktops, notebooks, workstations, and tablets, declined 9.1% year on year in Q2 2019, according to the latest insights from International Data Corporation (IDC). The global technology research and consulting firm's *Quarterly PCD Tracker* shows that a total of 5.1 million units were shipped during the quarter.

"As with previous quarters, the decline primarily rooted from tablets," says Fouad Charakla, IDC's senior research manager for client devices in the Middle East, Turkey, and Africa. "While tablets still account for the highest volume share of all PCD categories, they are continuing to lose popularity at a steady pace. Weakening consumer demand was the main cause of the overall slowdown seen in the region."

In terms of geography, IDC's research shows that the biggest decline in the MEA PCD market was seen in the Rest of Middle East (RoME) sub-region, of which Iran accounts for the highest volumes. "U.S. sanctions against Iran continue to inhibit shipments into the country," says Charakla. "At the same time, Turkey suffered a significant year-on-year decline in PCD shipments, caused by the Turkish lira remaining weak against the U.S. dollar. Consequently, Turkey is no longer the largest single market in MEA, losing its place to Saudi Arabia, which was the biggest contributor of growth in the region during Q2 2019. A number of large-scale deliveries into the education sectors of the UAE, Rwanda, and Ethiopia were also seen during the quarter."

The top three vendors in the MEA PC market maintained their respective positions in Q2 2019. HP suffered a year-on-year in shipments but was largely able to retain its market share, while both Lenovo and Dell enjoyed some year-on-year unit growth that saw them increase their shares.

Middle East & Africa PC Market Vendor Shares – Q2 2018 vs. Q2 2019		
Company	Q2 2018	Q2 2019
HP Inc.	31.9%	31.8%
Lenovo	18.9%	22.9%
Dell	15.5%	16.5%
Others	33.7%	28.8%

In the tablet space, Huawei managed to leapfrog into top spot in Q2 2019 following an aggressive push in Saudi Arabia. Samsung and Apple both experienced a year-on-year decline in shipments to rank second and third, respectively.

Middle East & Africa Tablet Market Vendor Shares – Q2 2018 vs. Q2 2019		
Company	Q2 2018	Q2 2019
Huawei	18.9%	21.9%
Samsung	21.0%	17.2%
Apple	9.1%	8.6%
Others	50.9%	52.2%

With a number of significant initiatives ongoing in the commercial space, and particularly in the public sector, IDC has revised its PCD market outlook further upwards. As a result, the market is anticipated to see year-on-year growth in Q3 2019, the first time this will have happened since Q4 2014. "A large tablet deal expected to be delivered into the government sector of Kenya will act as one of the primary drivers of this growth," says Charakla. "At the same time, although Turkey is still gradually recovering from the significant slowdown experienced over the past several quarters due to the weakening of the Turkish Lira, it is expected to perform significantly better year on year in Q3 2019, since Q3 2018 was when the slowdown was undergoing one of its worst periods."

"Looking at PCs in isolation (excluding tablets), we expect to see some growth in commercial demand for 2019 as a whole across several countries," continues Charakla. "With consumer demand continuing to falter, this will see 2019 become the first year for almost a decade in the MEA region where commercial deliveries surpass shipments for the consumer segment."

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For more information contact:

Sheila Manek
smanek@idc.com
+971 4 446 3154