

IDC: Q2 2017 Monitor Shipments Dip

Written by Marco Attard
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According to IDC global monitor shipments total 28.5 million units in Q2 2017-- a -6.4% Y-o-Y decline, although some of the market softness can be attributed to comparison with a strong Q2 2016.

That said, some market issues persist. After all, shipments are also down by -1.2% on a Q-o-Q basis, the first sequential decline on a Q2 since 2014. A mid-year quarter sequential decline is typically sign of the digestion of excess inventory, troubling since Q1 2017 also opened in the red.

Worldwide PC Monitor Unit Shipments, Market Share, and Year-over-Year Growth, Second Quarter 2017					
Vendors	2Q17 Unit Shipments	2Q17 Market Share	2Q16 Unit Shipments	2Q16 Market Share	2Q17/2Q16 Growth
1. Dell	5,568,886	19.5%	5,223,169	17.1%	6.6%
2. HP Inc.	3,972,784	13.9%	4,000,639	13.1%	-0.7%
3. Lenovo	2,819,047	9.9%	3,080,585	10.1%	-8.5%
4. Samsung	2,655,625	9.3%	2,933,640	9.6%	-9.5%
5. LG Electronics	2,606,629	9.1%	2,833,722	9.3%	-8.0%
Others	10,406,937	38.2%	12,402,413	40.7%	-4.8%
Total	28,520,098	100.0%	30,474,169	100.0%	-6.4%

Source: IDC Worldwide Quarterly PC Monitor Tracker, September 2017

However the analyst insists "optimism abounds," particularly around replacements of old monitors approaching end of life, as well as potentially strong back-to-school and holiday seasons. As such, IDC forecasts a -1.7% decline for H2 2017. The full-year 2017 forecast stands at 117m monitors, while Q2 2017 shipments are to total 27.8m, a -2.2% Y-o-Y decline.

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Looking further to the future, 2021 shipments are expected to be less than 112m, the result of adoption of mobile devices at lower price points.

"IDC expects the global PC monitor market will continue to decline at rates around 2% year over year from 2018 through 2020," the analyst adds. "However, the second proved to be better than forecast overall, with Japan, W. Europe, and CEE recording strong year Y-o-Y growth."

Interestingly, curved monitors are on the rise, taking over 3.8% Q2 2017 market share-- a 52.5% Y-o-Y increase. When it comes to the more popular sizes 21.5- and 19.5-inch continue to dominate with 22.1% and 11.6% market share respectively, while 23.8- and 27-inch see the highest Y-o-Y growth at 75.1% and 19.5%.

Monitors with TV tuners are expected to have 4.4% Q2 2018 market share, up from 4.1% in Q2 2017, led by LG and Samsung with combined market share of 99% in the category.

In vendor terms, Dell remains on top with 19.5% Q2 2017 global market share and shipments reaching over 5.5m units. The company sees strong growth in CEE (21.3%) and W. Europe (20%), with popular screens in the 42.5-, 23- and 14-inch sizes. HP follows with shipments of 4m units and 13.9% market share, while Lenovo climbs to the 3rd position with 13.9% share despite a shipment decline of -0.7% Y-o-Y.

Samsung drops to the 4th position with shipments of 2.6m units despite Y-o-Y gains in W. Europe and N. America. LG rounds off the top 5 with 9.1% market share and Y-o-Y gains in CEE and the US.

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