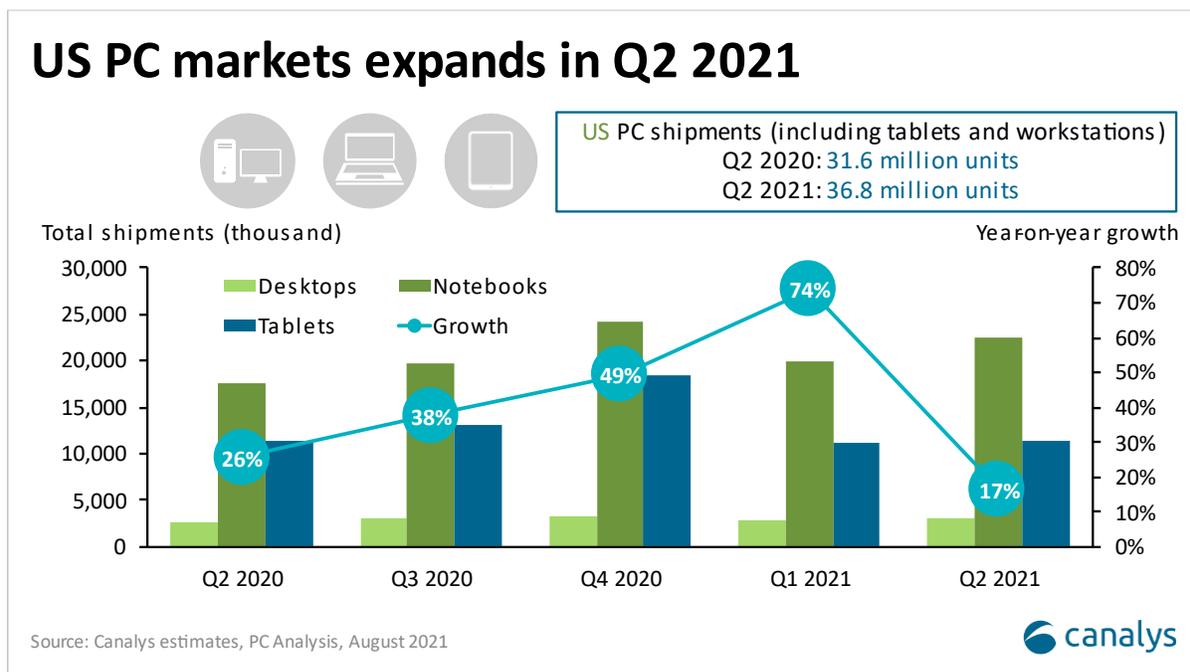


US PC shipments up 17% in Q2 2021, pointing to massive refresh potential

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 25 August 2021

The PC market in the US grew 17% year on year in Q2 2021, with total shipments of desktops, notebooks, tablets and workstations reaching 36.8 million units. Notebooks were the best performers, with shipments up 27% year on year, while desktops showed signs of recovery, increasing 23%. Tablets were almost stagnant, with shipments down 1%, as educators move away from them and the surge of consumer shipments due to the pandemic fades.



“It is clear now that pandemic-related use cases will extend well into the future,” said Brian Lynch, Research Analyst at Canalis. “This points toward a significant refresh opportunity in the future – fantastic news for PC vendors and their channel and ecosystem partners. The commercial and education segments have exploded, triggering tremendous refresh potential. The US economy has bounced back well from its pandemic woes and small businesses are recovering, which will lead to a wave of purchasing from the segment.”

**US total PC (including tablets) shipments (market share and annual growth)
Canalys PC Market Pulse Q2 2021**

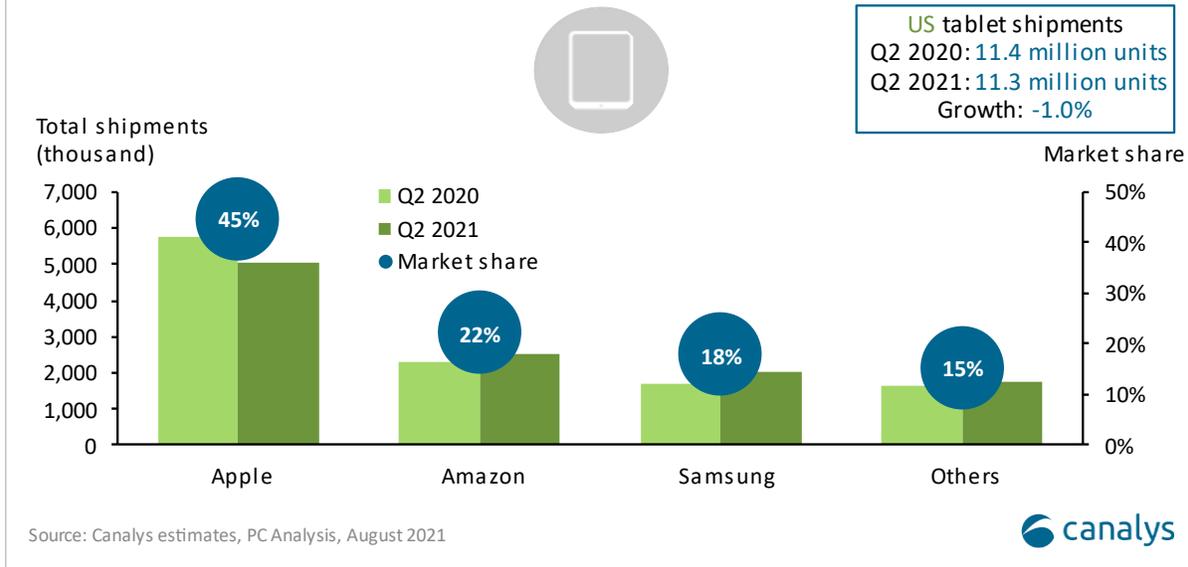
Vendor (company)	Q2 2021 shipments	Q2 2021 market share	Q2 2020 shipments	Q2 2020 market share	Annual growth
HP	8,070	21.9%	6,711	21.2%	20.2%
Apple	7,603	20.6%	7,821	24.8%	-2.8%
Dell	5,730	15.6%	5,183	16.4%	10.5%
Lenovo	4,572	12.4%	3,651	11.6%	25.2%
Samsung	3,039	8.2%	2,007	6.4%	51.4%
Others	7,833	21.3%	6,220	19.7%	25.9%
Total	36,846	100.0%	31,594	100.0%	16.6%

Note: Unit shipments in thousands. Percentages may not add up to 100% due to rounding.
Source: Canalys PC Analysis (sell-in shipments), August 2021

For the second quarter in a row, HP led the US PC market, with over 8 million devices shipped. HP continued to dominate the Chromebook market too, with a 42% market share in the US. Apple remained second in the US PC market despite a 3% decline. It was the only major PC vendor to post negative growth. This can be attributed to iPad demand tailing off. Apple had more success with notebooks, with 24% year-on-year shipment growth, partly due to the success of the M1 chip. Dell saw comparatively modest growth, at 11%. Lenovo and Samsung continued to outperform other vendors, posting 25% and 51% growth respectively in PC sales-out. Lenovo performed well by investing in the surging US Chromebook market. Aside from its rapid ascendancy in the Chromebook market, Samsung has also solidified its status as a mainstay in the US tablet market, growing 19% this quarter while the overall market shrunk slightly.

The tablet market has showed signs of slowing in 2021, posting a 1% decline this quarter from its spike earlier in the pandemic, in Q2 2020. The tablet market ballooned in 2020 as consumers were stuck at home, with families looking for extra screens for entertainment and communication. That surge has faded slightly and lacks the future refresh cycle strength that notebooks will see from purchases made early in the pandemic. iPads performed well in Q2 2020 as Apple kept up with component shortages better than its key competitors. Since then, other vendors have made up ground, leading to Apple shrinking while Amazon and Samsung have grown.

Little overall change in the US tablet market



The unexpected resurgence of COVID-19 in the United States with the Delta variant has solidified the long-term strategy of many companies to support hybrid working models. Many workers prefer to remain at home, which will increase the dependency of US workers on their devices, bolstering commercial refresh opportunities.

Schools in the US are expected to continue in-person education for the 2021/2022 school year, regardless of surging case rates across the country. In-person education will not hinder the refresh opportunity in the US. Educational trends point toward PCs being a vital part of the classroom. Blended learning, hybrid models and online courses will be a mainstay in the US. Education is now transitioning to a replacement market for PCs in the US, and the mass procurement seen in 2020 and 2021 is expected to begin its refresh cycle in 2023. "The US PC industry is set for a bright future. Whether it be work, school or leisure at home, PCs are in users' hands more than ever. The integration of devices into everyday life points toward a rosy future for the market," said Lynch.

For more information, please contact:

Brian Lynch (US): brian_lynch@canalys.com +1 650 927 5489

Rushabh Doshi (India): rushabh_doshi@canalys.com +91 99728 54174

About Canalys

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