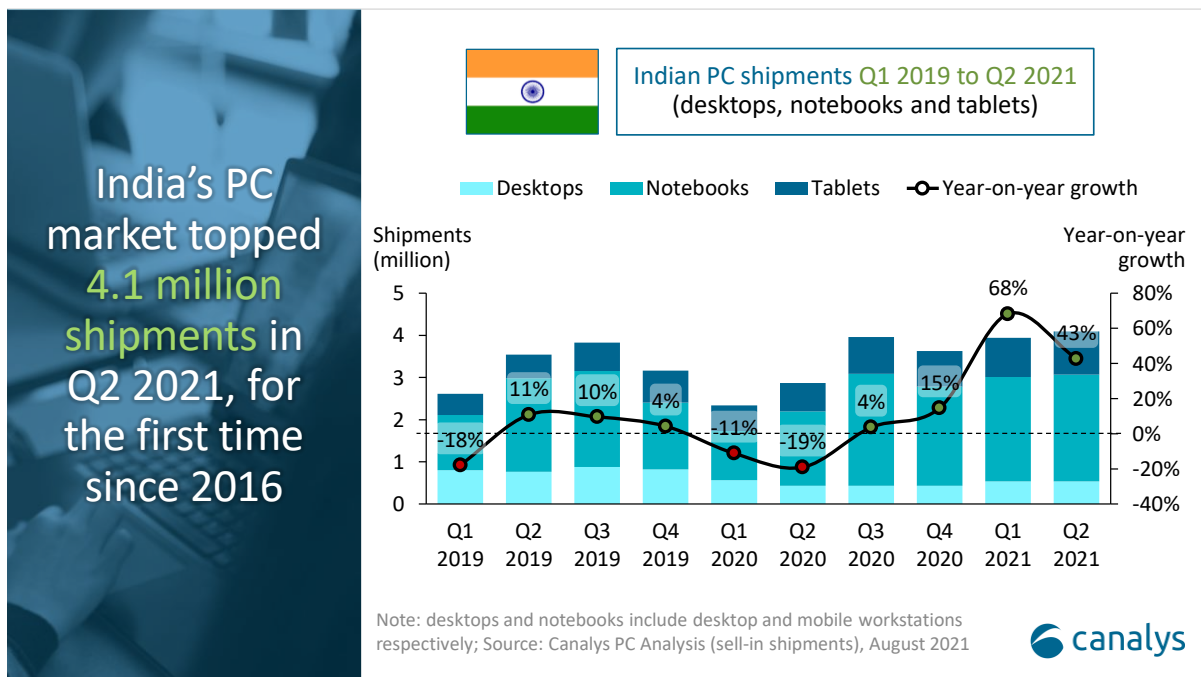


PC shipments in India hit five-year high of 4.1 million in Q2 2021

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 8 September 2021

PC shipments in India grew by 43% year on year in Q2 2021 to reach 4.1 million units, comprising half a million desktops, 2.5 million notebooks and 1.0 million tablets. Almost all categories grew by double-digit percentages year on year, mainly due to a lackluster performance in Q2 2020, when the entire country was under lockdown, braving the first wave of COVID-19. Shipments of notebooks, the largest category by volume, grew 43% over Q2 2020. Tablets also had one of their best quarters since 2016, with 52% year-on-year shipment growth. Desktop shipments were up by 23%.



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

Product category	Q2 2021 shipments	Q2 2021 market share	Q2 2020 shipments	Q2 2020 market share	Annual growth
Desktop	515	12.6%	419	14.6%	23.0%
Notebook	2,495	60.9%	1,742	60.7%	43.2%
Tablet	1,033	25.2%	679	23.7%	52.0%
Workstation	54	1.3%	31	1.1%	75.2%
Total	4,097	100.0%	2,871	100.0%	42.7%



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

Vendor performances

- **HP** maintained its leadership position with shipments up 54% year on year in Q2 2021. The vendor has managed to consolidate its market share by doubling down on consumer products. HP recently launched its affordable Victus gaming series in India, which is squarely aimed at the price-conscious buyer. The vendor grew its notebook shipments by 59%.
- **Lenovo** finished in second place with flattish 3% year-on-year growth in Q2 2021. Part of the reason for this slower-than-average growth was its strong performance in Q2 2020, when it managed its supply chain better than its competitors and ensured healthy market sell-in. Unlike HP, Lenovo is yet to make a dent in the consumer space and so didn't benefit from the healthy market recovery there. Lenovo's notebook shipments fell by 3% while its tablet shipments grew 16% in Q2 2021.
- **Dell** came in third with a 12.8% market share, growing 40% annually. It grew in all product categories and maintained its stronghold in the commercial segment, where it has seen 71% year-on-year growth. Dell has been quick to flood the market with Intel's 11th Gen SKUs, which has been instrumental in its popularity among enterprises.

- **Samsung** finished fourth thanks to its strong tablet business. It grew shipments by a massive 134% year on year. Samsung is uniquely positioned to benefit from the cost-conscious device procurement happening across India to support multiple government and educational institutions. Canalys expects Samsung to benefit from the drive to remote learning and its connected tablets will be at the forefront of this seismic shift in education in India.
- **Acer** finished fifth as the vendor topped Apple and grew its total shipments by an impressive 95% year on year. Acer managed to return to the level of shipments it had pre-pandemic and is now focused on providing affordable computing to the consumer segment via its Chromebook offerings with leading online retailers in India.

Indian total PC 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	1,066	26.0%	692	24.1%	54%
Lenovo	840	20.5%	819	28.5%	3%
Dell	525	12.8%	376	13.1%	40%
Samsung	403	9.8%	172	6.0%	134%
Acer	326	8.0%	168	5.8%	95%
Others	935	22.8%	646	22.5%	45%
Total	4,097	100.0%	2,871	100.0%	43%

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

“The market has finally returned to pre-COVID shipment levels,” said Canalys Research Analyst Ashweej Aithal. “While desktops and notebooks haven’t really seen a major bump in shipments, tablets are in much higher demand than before, resurrecting what was a dying category in India. Due credit for that should be given to remote learning, as well as the accelerated digital transformation of multiple industries and processes. As we look ahead to the second half of the

year, Canalys is positive about the Indian PC market, as major government and educational tenders, which were put on hold due to the COVID-19 Delta variant wave, are now re-tendered.”

“Compared to western markets, long-term demand in India remains low,” added Aithal. “While COVID-19 has helped move the needle slightly when it comes to PC penetration, it has been unable to generate a lot of demand, as vast portions of the population still regard PCs as a luxury, not a must-have. Added to that, India also has some of the poorest broadband penetration rates in the world. While the long-term outlook for PCs in India is still positive, it is not going to outshine the US or Western Europe.”

For more information, please contact:

Ashweej Aithal (India): ashweej_aithal@canalys.com +91 97386 19281

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

About Canalys

Canalys is an independent analyst company that strives to guide clients on the future of the technology industry and to think beyond the business models of the past. We deliver smart market insights to IT, channel and service provider professionals around the world. We stake our reputation on the quality of our data, our innovative use of technology and our high level of customer service.

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