

IT Industry Update

01 April 2020

CONTEXT COVID-19 Weekly Report



01

CLIMATE SURVEY FEEDBACK

02

TOP TRENDS WESTERN & EASTERN EUROPE

03

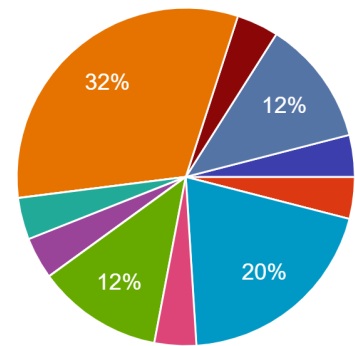
CATEGORY HIGHLIGHTS

04

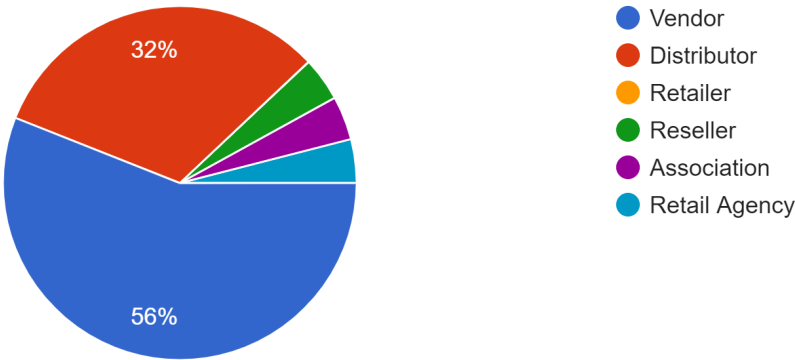
COUNTRY FOCUS

CLIMATE SURVEY FEEDBACK

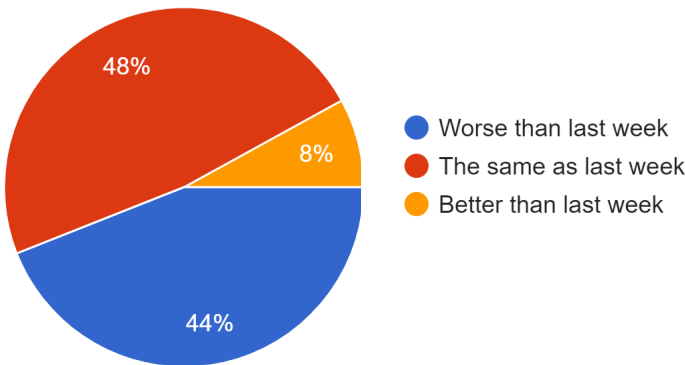
Your country:
25 responses



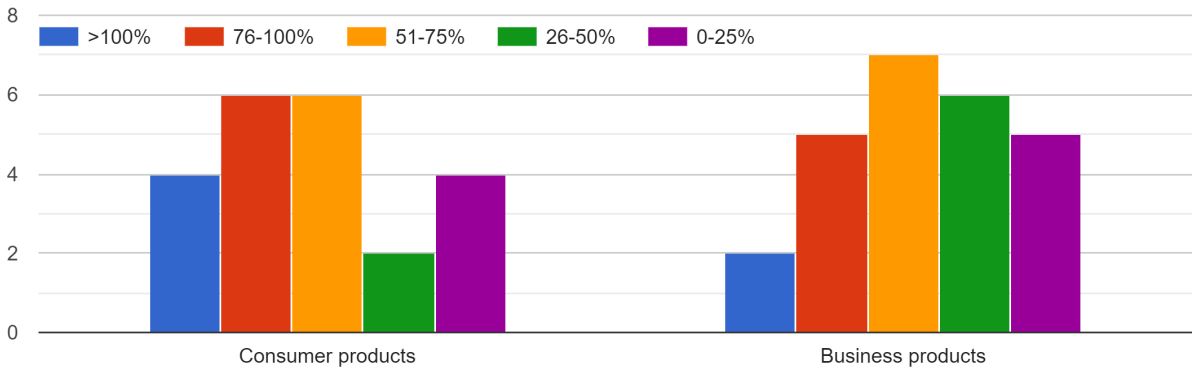
What is your business?
25 responses



How is the situation for the IT industry in your country?
25 responses



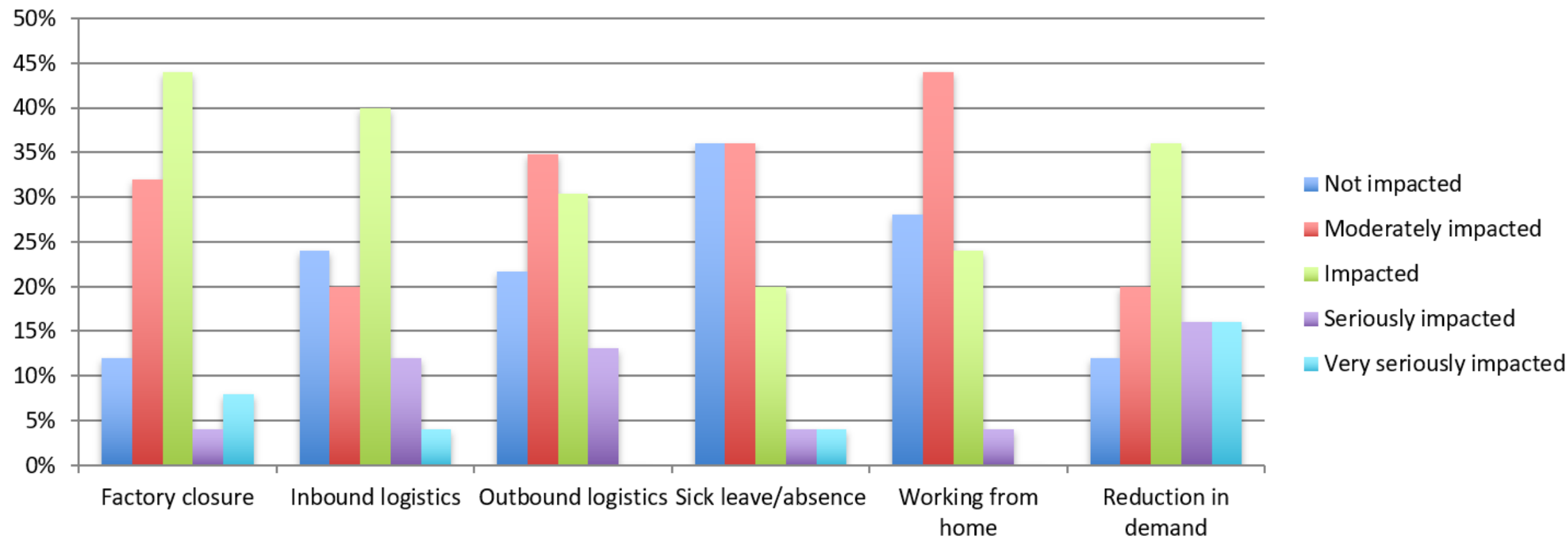
How much activity are you seeing in different IT channels to market (compared to normal)?



CLIMATE SURVEY FEEDBACK

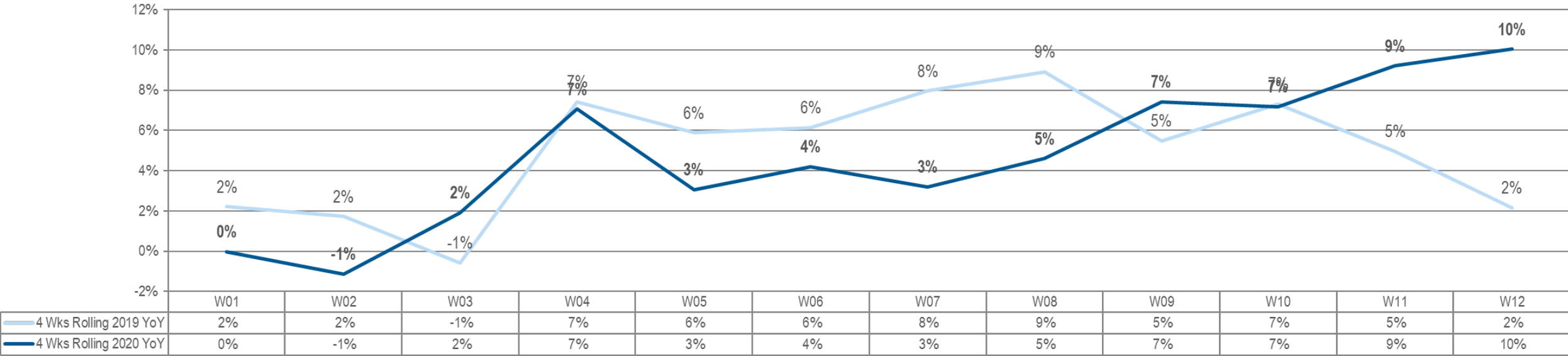


How much is your business affected by the following factors?



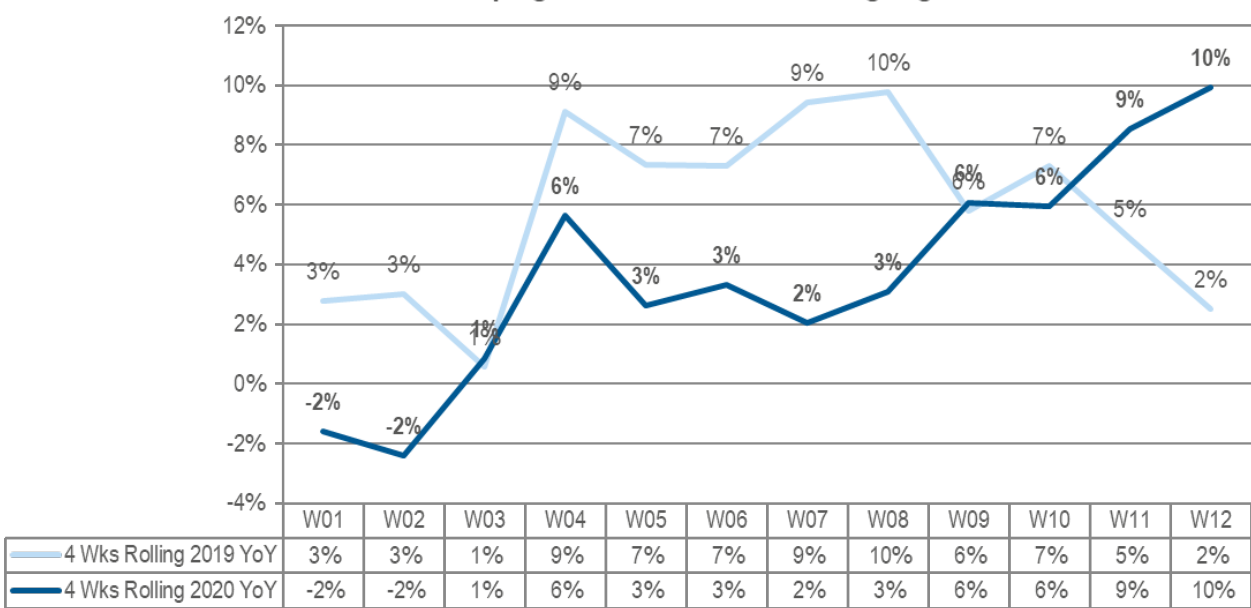
DIVERGENCE STARTS IN WEEK 11 – TWO WEEKS AFTER ITALY CLOSES SCHOOLS, AND WEEK WHEN SPAIN DOES THE SAME

European Panel growth Y/Y 4 weeks rolling avg

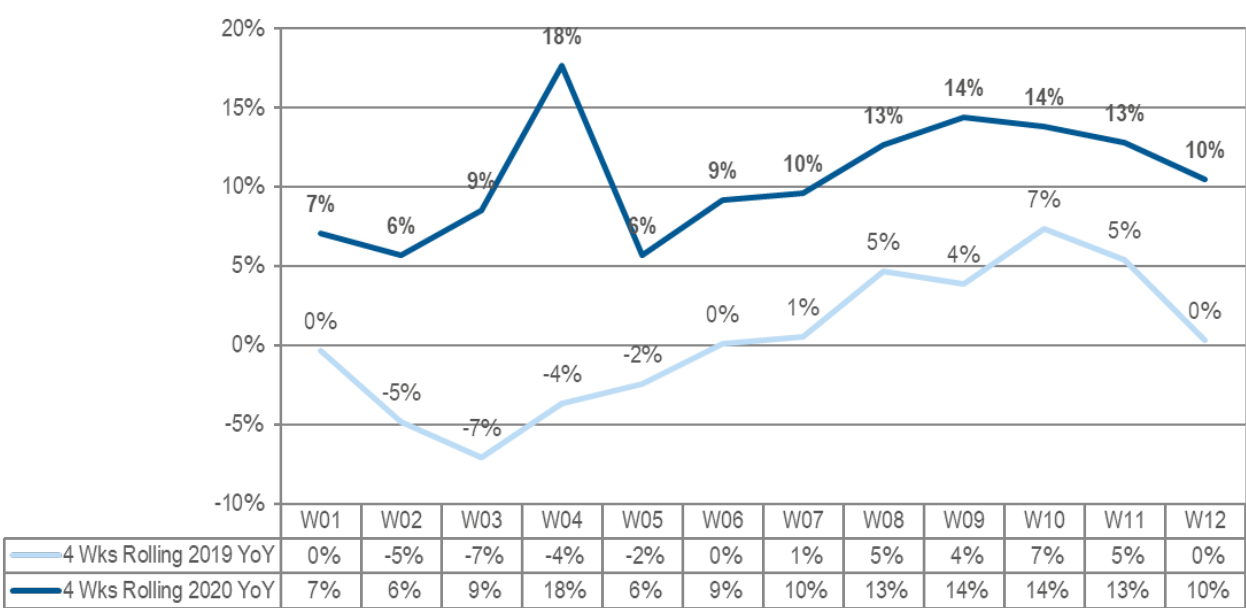


EASTERN EUROPE FOLLOWS A DIFFERENT PATH – LESS ACCELERATION OF SPENDING ON IT

Western Europe growth Y/Y 4 weeks rolling avg



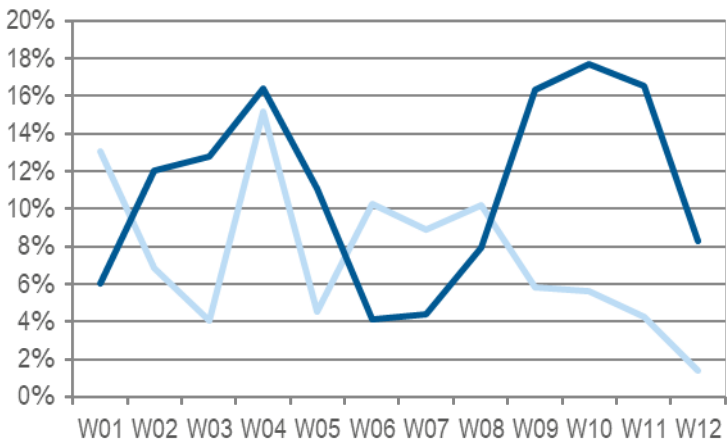
Eastern Europe growth Y/Y 4 weeks rolling avg



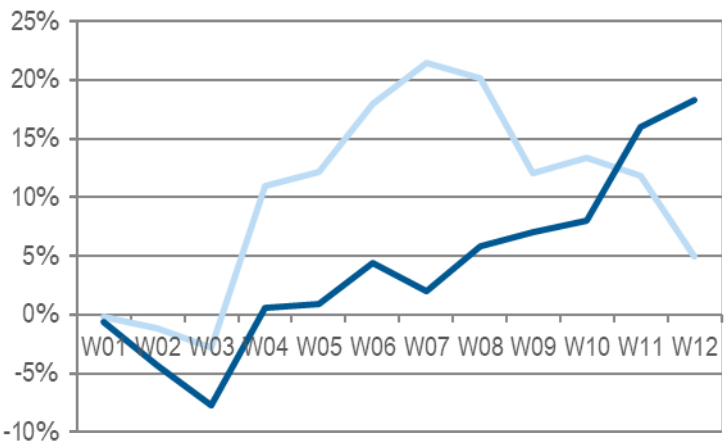
FROM EARLIEST IN COVID-19 CYCLE TO MOST RECENT - WESTERN EUROPE



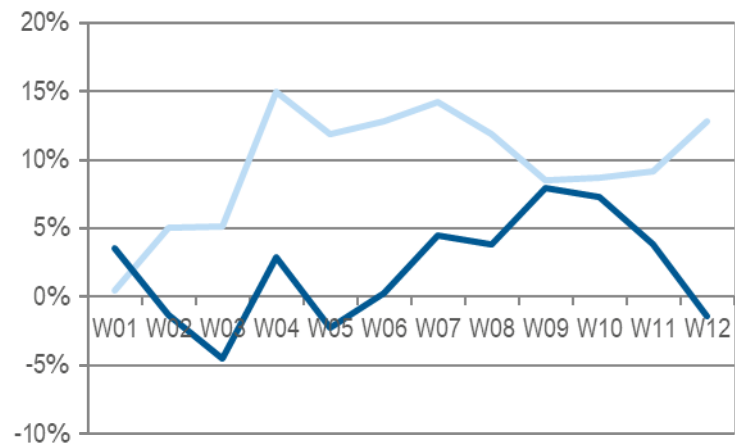
Italy growth Y/Y 4 weeks rolling avg Week 9



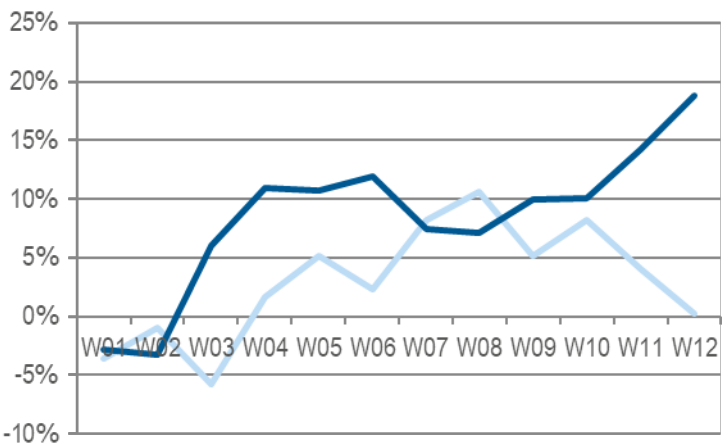
Spain growth Y/Y 4 weeks rolling avg Week 11



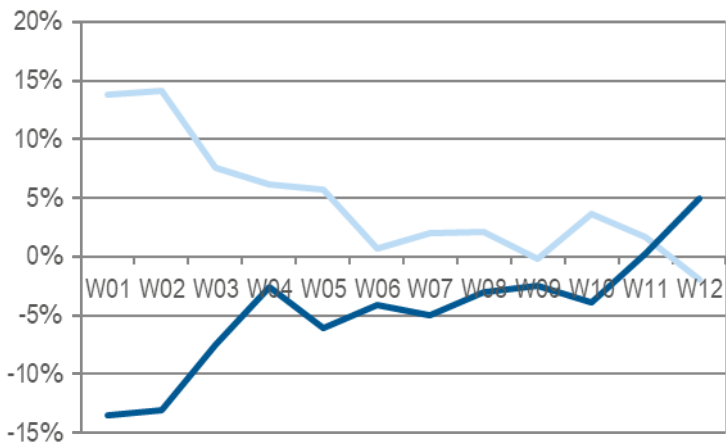
France growth Y/Y 4 weeks rolling avg Week 11



Germany growth Y/Y 4 weeks rolling avg Week 12



United Kingdom growth Y/Y 4 weeks rolling avg Week 13

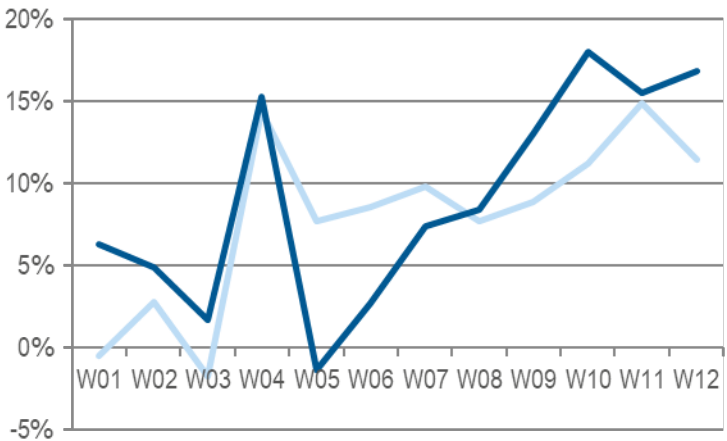


Sorted in order of week of school closure

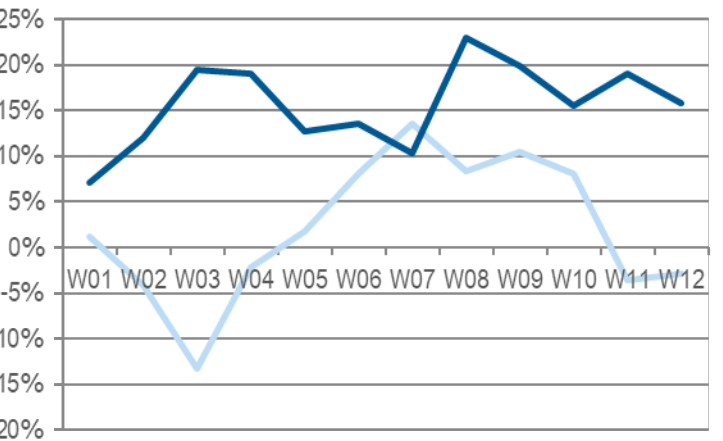
FROM EARLIEST IN COVID-19 CYCLE TO MOST RECENT - EASTERN EUROPE



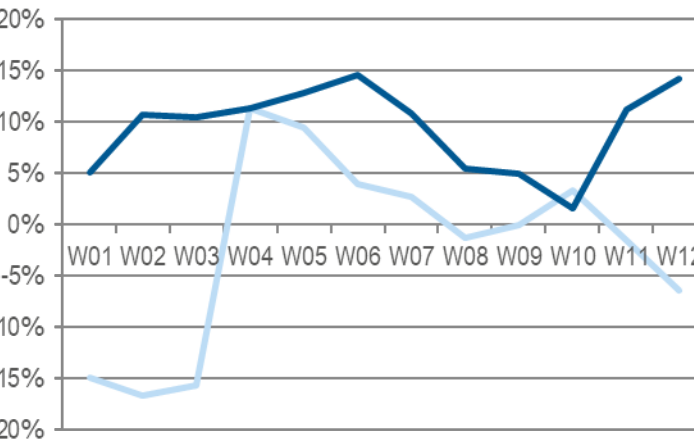
Poland growth Y/Y 4 weeks rolling avg Week 11



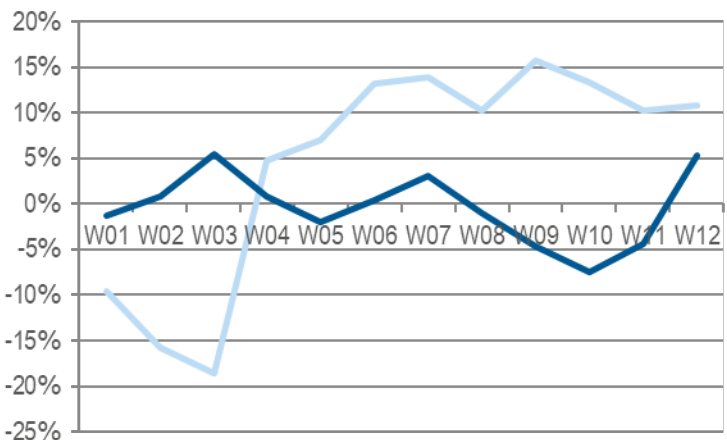
Czech Republic growth Y/Y 4 weeks rolling avg Week 11



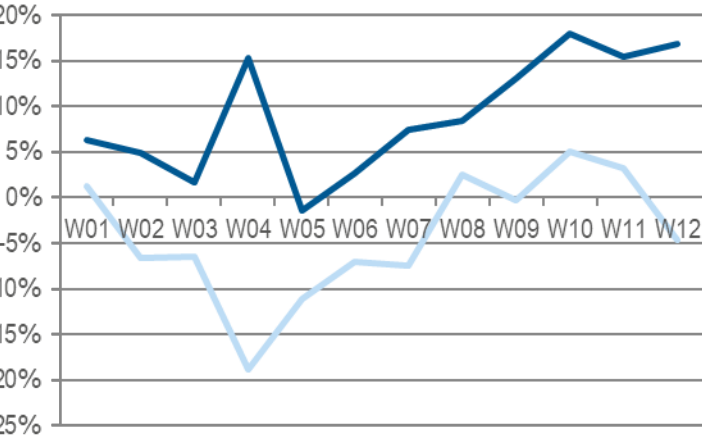
Slovakia growth Y/Y 4 weeks rolling avg Week 11



Baltics growth Y/Y 4 weeks rolling avg Week 11



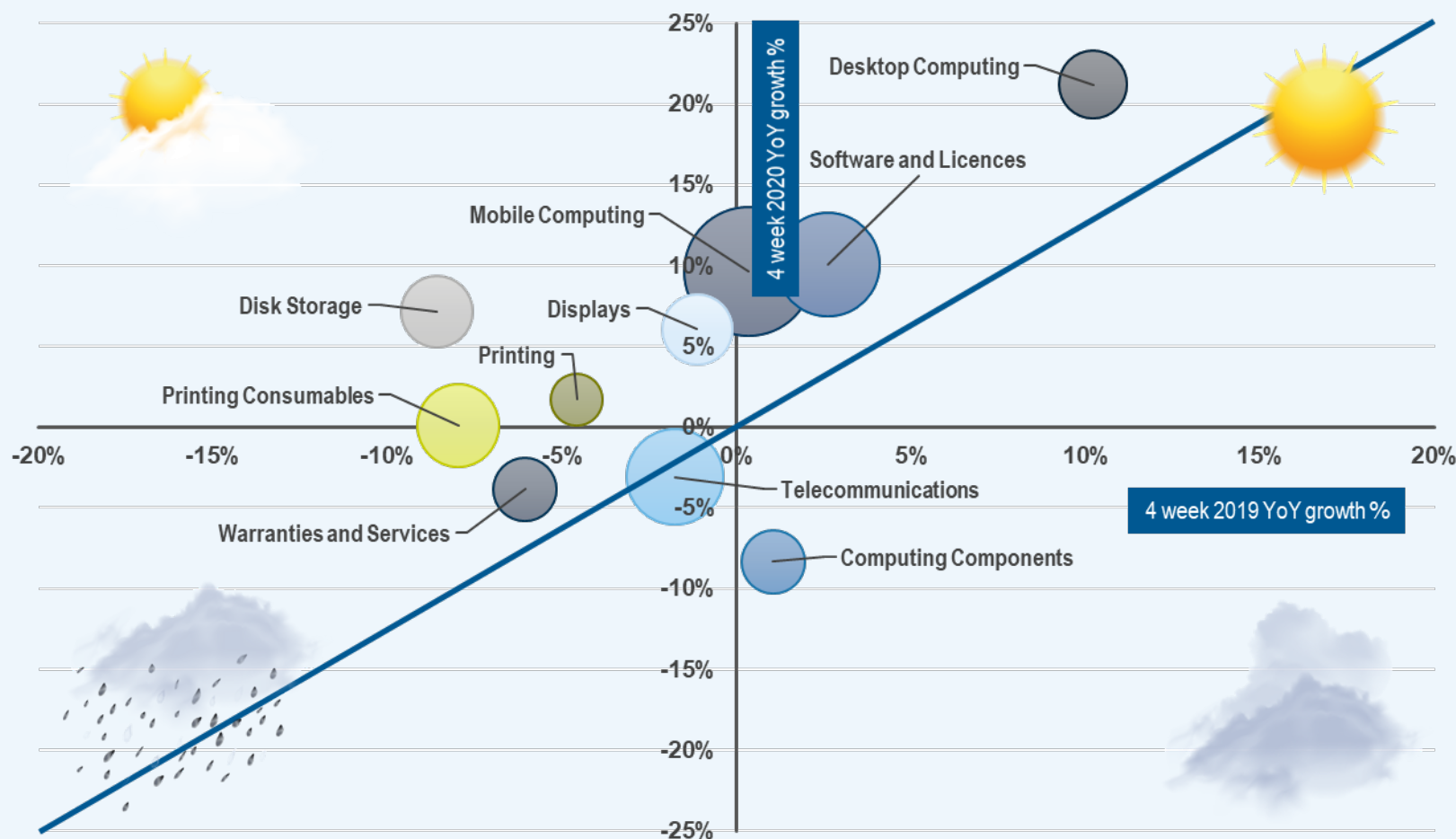
Russia growth Y/Y 4 weeks rolling avg Week 13 (partial)



Sorted in order of week of school closure

INDUSTRY SECTOR GROWTH - TOP 10 BY SALES

% Change in sales through IT Distribution in €: 4 Weeks to 22/3/20 vs Same Period 2019 growth

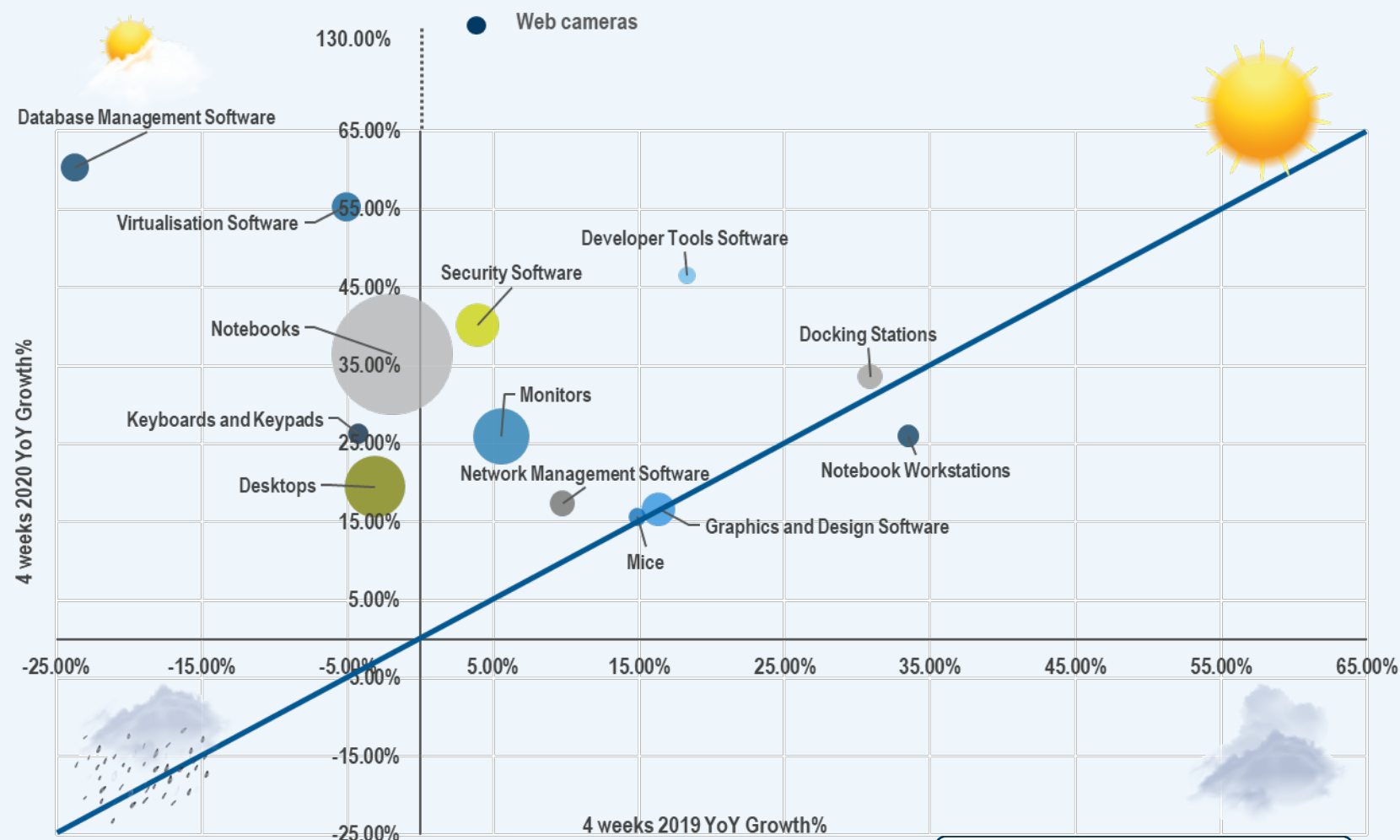


Traffic Lights:	
Above	15%
Inbetween	
Below	-20%

Industry Sector	Q4-19	Q1-20
Mobile Computing	0%	10%
Software and Licences	3%	10%
Telecommunications	-2%	-3%
Printing Consumables	-8%	0%
Disk Storage	-9%	7%
Displays	-1%	6%
Desktop Computing	10%	21%
Warranties and Services	-6%	-4%
Computing Components	1%	-8%
Printing	-5%	2%
Networking Systems	-3%	1%
Audio-Video Systems	30%	57%
Computing Accessories	8%	9%
Server Computing	-18%	-15%
Data Centre Networking and Security	-20%	-17%
Wireless Networking	-2%	7%
Power Equipment	-7%	7%
Wearable Devices	26%	9%
Other Networking Equipment	1%	-5%
Connectivity	9%	4%
Removable Storage	-23%	-11%
Home and Garden	-7%	3%
Smart Home and Office	27%	9%
Unified Communications	-7%	0%
Scanner Imaging	-3%	-12%
Electronics	-24%	-22%
Games Consoles	-9%	24%
Tape Storage	-5%	6%
Security	-9%	7%
Terminals, Thin Clients and Points of Sales	-3%	-30%
Photo and Video Cameras	-16%	-8%
Security Devices	9%	12%
eHealth Devices	48%	24%
Other	41%	93%

CATEGORY GROWTH - TOP 15 BY GROWTH %

% Change in sales through IT Distribution in €: 4 Weeks to 22/3/20 vs Same Period 2019 growth

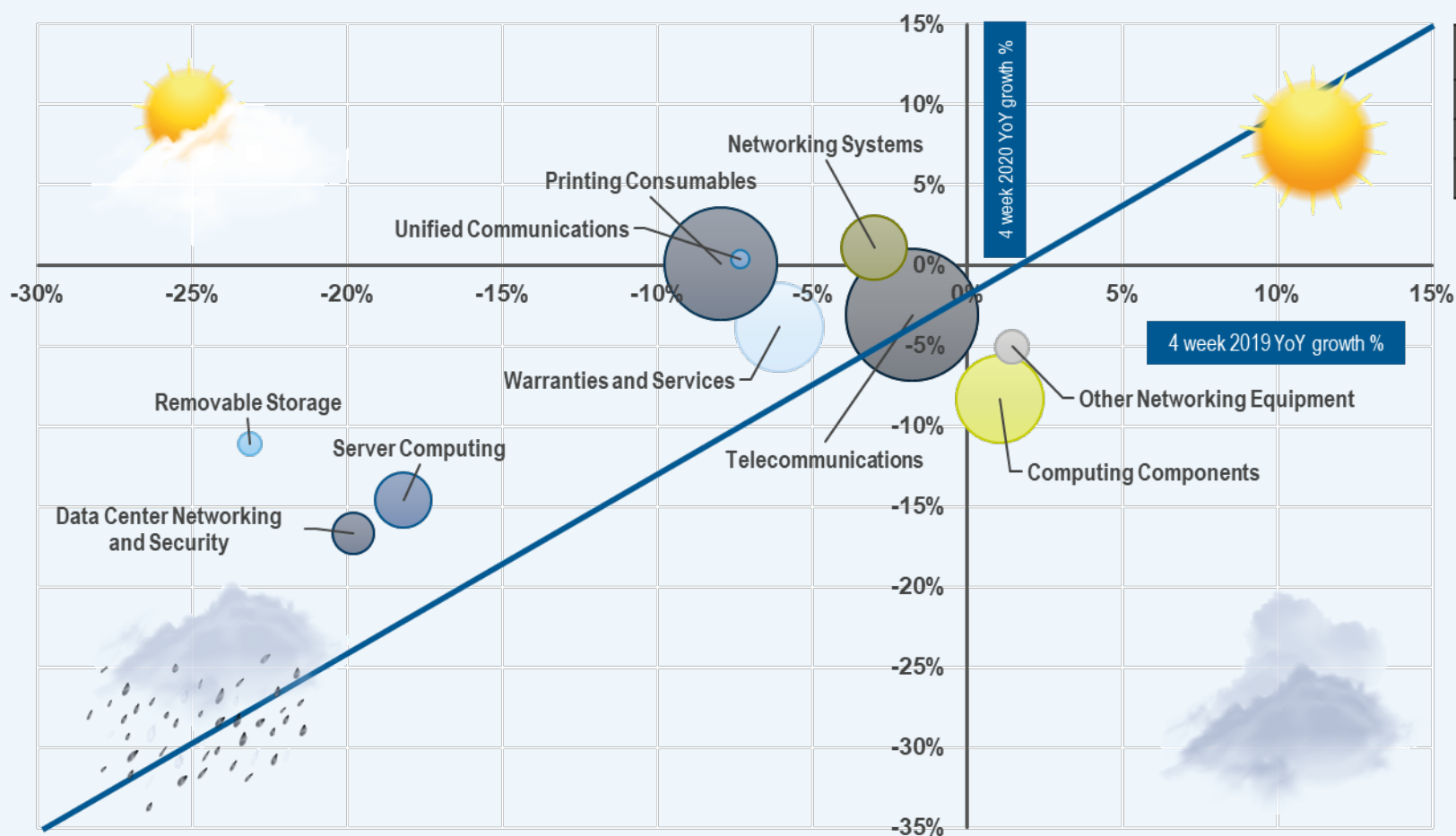


Traffic Lights:	
Above	15%
Inbetween	
Below	-20%

Category	Q1-19	Q1-20
Web Cameras	5%	127%
Headsets/Headphones and Microphones	31%	78%
Database Management Software	-24%	60%
Virtualisation Software	-5%	55%
Developer Tools Software	18%	47%
Security Software	4%	40%
Notebooks	-2%	38%
Docking Stations	31%	34%
Keyboards and Keypads	-4%	28%
Notebook Workstations	33%	26%
Monitors	6%	26%
Desktops	-3%	19%
Network Management Software	10%	17%
Graphics and Design Software	18%	17%
Mice	15%	16%
Office Applications Software	6%	12%
Data Management Software	-5%	10%
Transceivers	-15%	9%
Uninterruptible Power Supplies (UPS)	-2%	9%
Tablet PCs	7%	8%
Other Software and Licences	-14%	8%
Ink Cartridges and Tanks	0%	7%
Operating Systems Software	10%	7%
Desktop Workstations (PC/Mac)	11%	5%
All-in-One Inkjets	-5%	4%
Cables and Connectivity Adapters	11%	3%
Network Routers	12%	3%
Televisions	11%	3%
Wireless Access Points	4%	3%
NAS Devices	-9%	2%
Large Format Displays	3%	2%
Network Switches	-5%	1%
Network Management and Security Appliances	-6%	1%
Toner	-14%	0%
Motherboards	3%	0%
Smart Watches	87%	-1%
Hard Disk Drives (HDDs)	-16%	-1%
Solid State Drives (SSDs)	10%	-2%
Processors	19%	-3%
Other Power Equipment	-8%	-3%
Warranties and Services	3%	-4%
Long Life Consumables	-10%	-5%
All-in-One Lasers	3%	-7%
Smartphones	20%	-9%
Disk Arrays	17%	-9%
Projectors	-17%	-12%
Servers (PC/Mac)	-3%	-12%
Laser Printers	-5%	-18%
RAM Memory	-13%	-20%
Graphics Cards	-17%	-32%

INDUSTRY SECTOR GROWTH: TOP 10 BY DECLINE

% Change in sales through IT Distribution in €: 4 Weeks to 22/3/20 vs Same Period 2019 growth



Traffic Lights:	
Above	15%
Inbetween	
Below	-20%

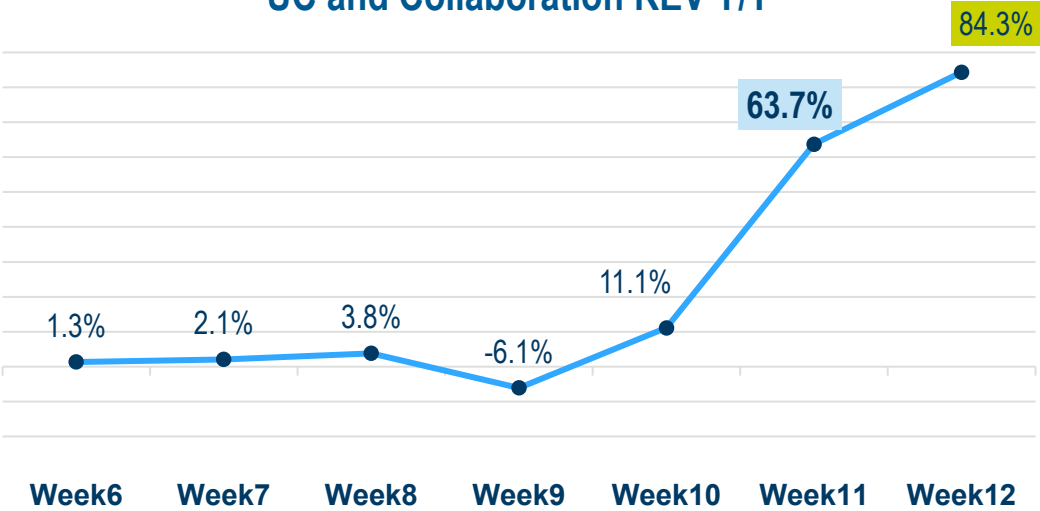
Industry Sector	Q4-19	Q1-20
Terminals, Thin Clients and Points of Sales	-3%	-30%
Electronics	-24%	-22%
Data Centre Networking and Security	-20%	-17%
Server Computing	-18%	-15%
Scanner Imaging	-3%	-12%
Removable Storage	-23%	-11%
Computing Components	1%	-8%
Photo and Video Cameras	-16%	-8%
Other Networking Equipment	1%	-5%
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Networking Systems	-3%	1%
Printing	-5%	2%
Home and Garden	-7%	3%
Connectivity	9%	4%
Tape Storage	-5%	6%
Displays	-1%	6%
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Market Review

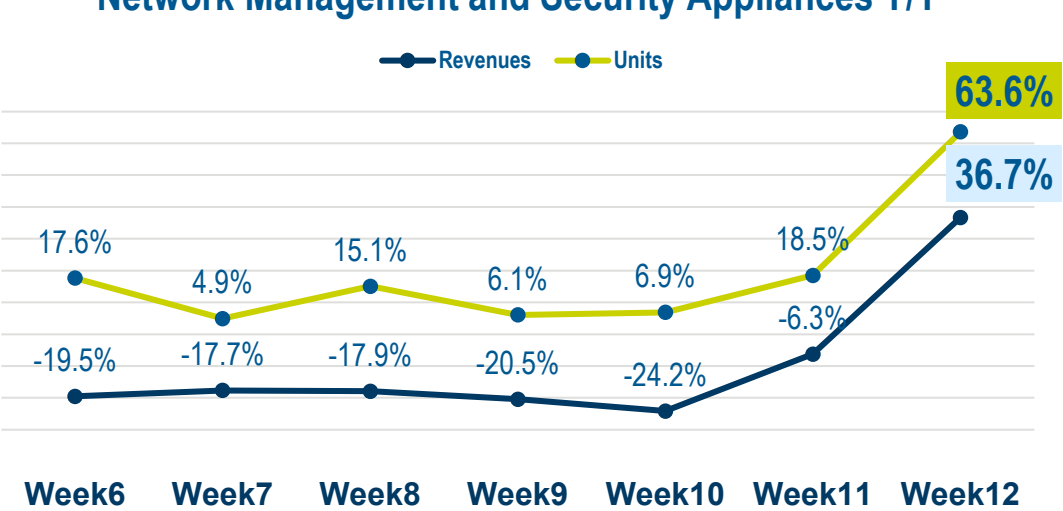
ENTERPRISE WE: SOFTWARE AND UC UP; INFRASTRUCTURE – GOOD IN PARTS



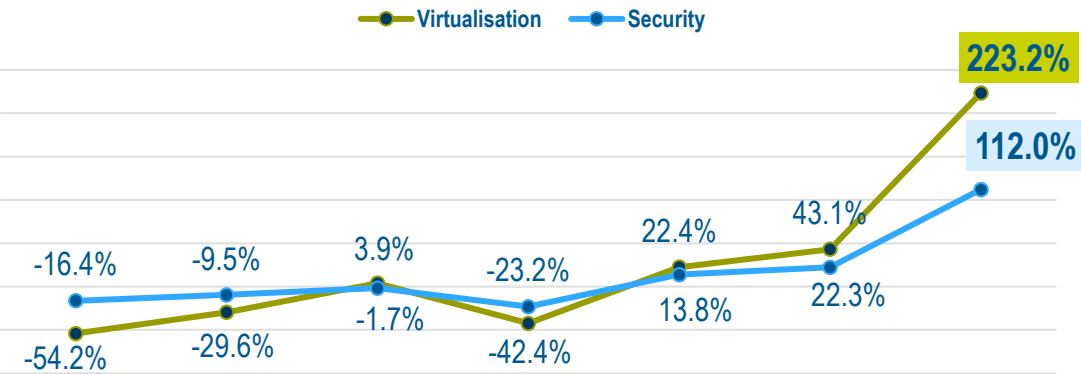
UC and Collaboration REV Y/Y



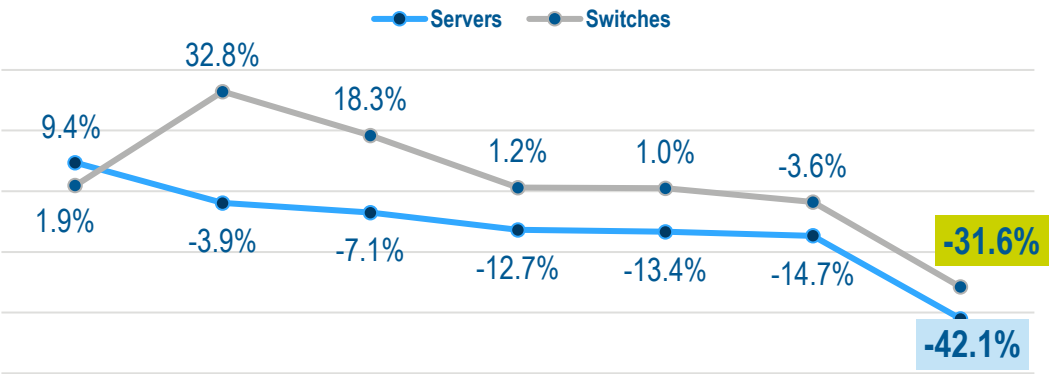
Network Management and Security Appliances Y/Y



Virtualisation and Security software REV Y/Y



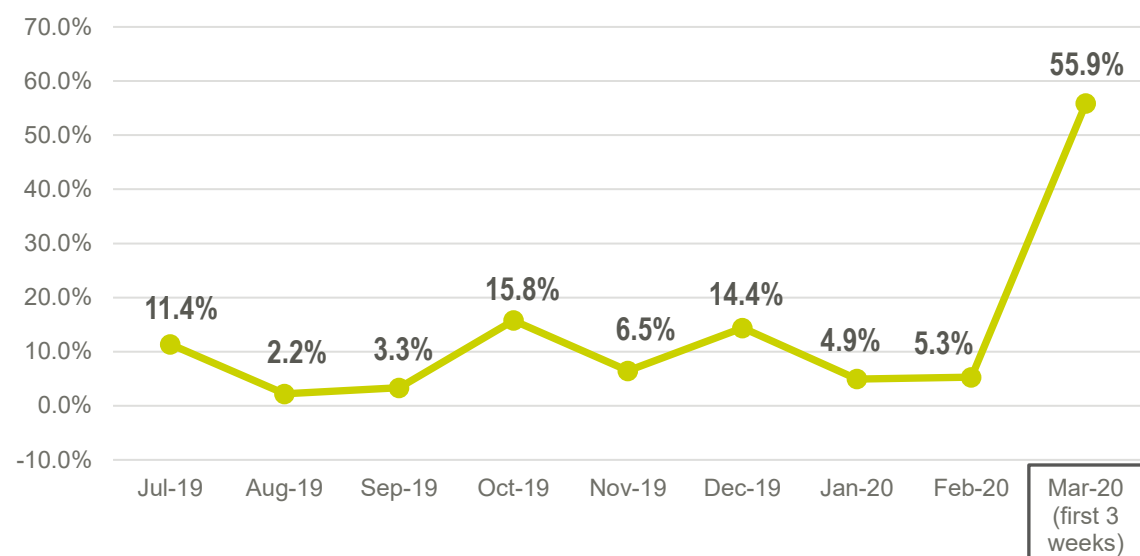
Infrastructure UNITS Y/Y



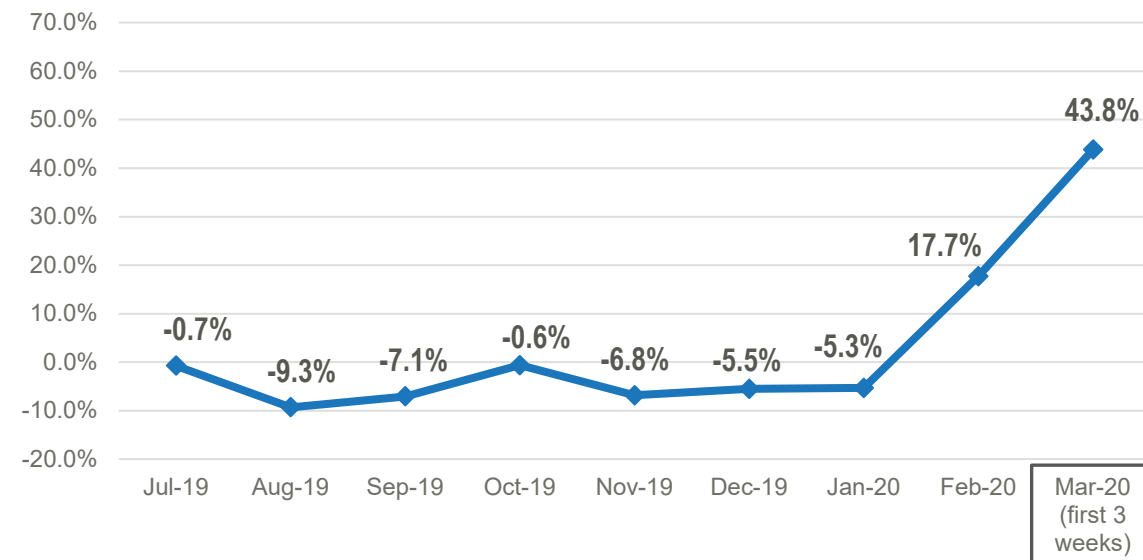
PCS WE: EARLY MARCH SEES SURGE IN LAPTOP DEMAND



Y/Y volume growth, business-targeted notebooks



Y/Y volume growth, consumer-targeted notebooks



Early March 2020 (first 3 weeks), top WE markets:

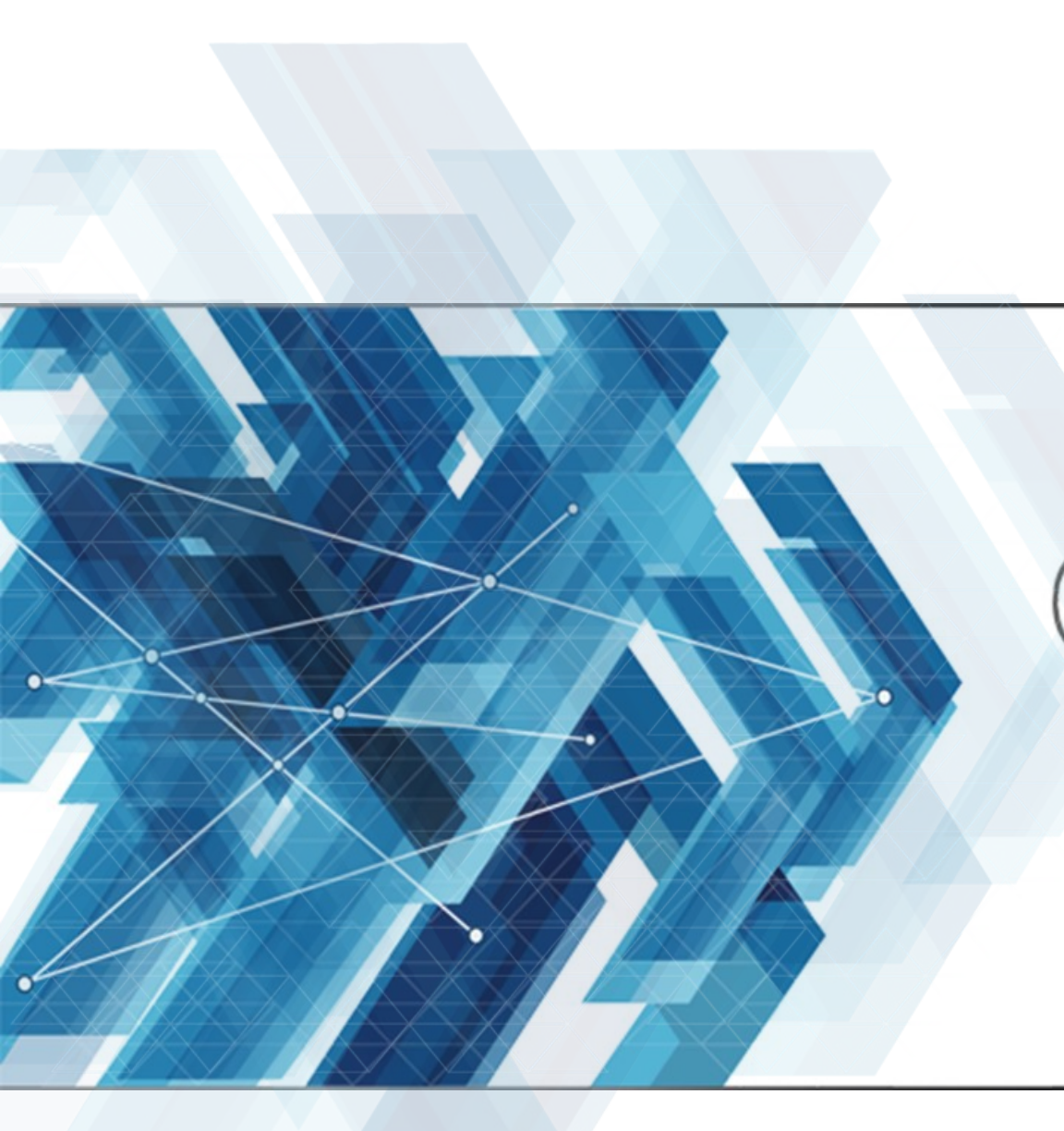
	Business notebooks, Y/Y volume growth
United Kingdom	67.9%
Germany	24.9%
Italy	136.7%
Spain	143.2%
France	20.6%

Early March 2020 (first 3 weeks), top WE markets:

	Consumer notebooks, Y/Y volume growth
Germany	92.5%
United Kingdom	22.8%
Spain	59.0%
Italy	82.5%
France	-12.6%

Thank you!

**ANY
QUESTIONS?**



Optimise today
Accelerate tomorrow