



ALCALDÍA MAYOR
DE BOGOTÁ D.C.
SECRETARÍA DE HABITAT

ESTUDIOS PREVIOS PARA CONTRATACIÓN POR ACUERDO MARCO DE PRECIOS

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

El presente formato no debe ser modificado en su parte estructural. Diligencie únicamente los espacios correspondientes a cada uno de los ítems de acuerdo con las instrucciones en color gris, las cuales deben ser eliminadas al diligenciar el formato.

Subsecretaría de Gestión Corporativa y CID	
FECHA:	07/09/2020
DEPENDENCIA SOLICITANTE:	Subsecretaría de Gestión Corporativa y CID

1. DESCRIPCIÓN DE LA NECESIDAD:

Con el propósito de alcanzar los objetivos y metas propuestas en el cumplimiento de su misión, la Secretaría Distrital del Hábitat (SDHT) requiere llevar a cabo estrategias y actividades que permitan fortalecerse institucionalmente, garantizando la eficiencia de sus procesos y la eficacia de su gestión.

De conformidad con el Decreto 578 de 2011, dentro de las funciones asignadas a la Dirección de Gestión Corporativa y Control Interno Disciplinario de la Entidad, se encuentra asesorar y apoyar a la Secretaría en materia de tecnología informática para el cumplimiento de la misión y objetivos institucionales, con el fin de garantizar la disponibilidad y seguridad de su información.

Debido al aumento en el recurso humano para cumplir con la misionalidad de la SDHT, los equipos de cómputo que dispone no han sido suficientes para satisfacer la necesidad en la dependencias para cumplir con las tareas designadas, estos usuarios requieren realizar labores con bases de datos que requieren hardware optimizado para situaciones que requieren un alto rendimiento y fiabilidad, en donde generalmente cualquier otro computador personal tradicional dejaría rápidamente de responder, bajo este contexto existen en el mercado equipos de cómputo para trabajo intermedio y avanzado, los cuales cumplen a cabalidad los requisitos del software anteriormente mencionado.

Teniendo en cuenta la capacidad de la infraestructura tecnológica física de la entidad, se requiere que los equipos de cómputo sean portátiles, para garantizar la disponibilidad, practicidad para traslado, fácil mantenimiento, dado que no requieren uso de la tomacorriente regulada y disponen de acceso a la red inalámbrica.

Por ende, se hace necesario realizar la compra de treinta y dos (32) equipos de cómputo y nueve (9) monitores distribuidos de la siguiente manera:

✓ 1.16. Subcategoría Compraventa de ETP - Portátiles - Sistema operativo Windows:

- Ítem 1, tipo: ETP; característica 1: 13pulgadas PESO MAXIMO 1,5KG, característica 2: Windows 10 de 64 bits, característica 3: Umbral 3000, característica 4: procesamiento Intermedio, característica 5: disco duro mecánico "HDD", característica 6: capacidad 1TB, característica 7: N/A, característica 8: memoria RAM de 16 GB, cantidad total: Veintisiete (27).





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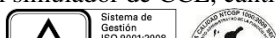
ESTUDIOS PREVIOS PARA CONTRATACIÓN POR ACUERDO MARCO DE PRECIOS

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

- Ítem 2; tipo: Servicio; característica 1: garantía extendida portátiles, característica 2: dos (2) años (para quedar con un total de tres (3) años de garantía por equipo), característica 3: Valor unitario por ETP, cantidad total: Veintisiete (27).
- Ítem 3; tipo: Accesorio; característica 1: guaya de seguridad, cantidad total: Veintisiete (27).

✓ 1.6. Subcategoría Compraventa de ETP - AIO - Sistema operativo Windows:

- Ítem 1, tipo: ETP; característica 1: All in One AIO 23.8pulgadas, característica 2: Windows 10 de 64 bits, característica 3: Umbral 4100, característica 4: procesamiento Avanzado, característica 5: N/A, característica 6: disco duro de estado sólido "SSD", característica 7: capacidad 500GB PCIe, 500GB PCIe, característica 8: memoria RAM de 16 GB, cantidad total: Cinco (5).
- Ítem 2, tipo: Accesorio; característica 1: monitor de 27" de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos el cual estará compuesto por puerto HDMI, como se establece en las observaciones generales del simulador de CCE, cantidad total: Uno (1).
- Ítem 3; tipo: Accesorio; característica: monitores de 23.8" de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos los cuales estarán compuestos por puerto HDMI, como se establece en las observaciones generales del simulador de CCE, cantidad total: ocho (8).
- Ítem 4; tipo: Servicio; característica 1: garantía extendida equipo de cómputo, característica 2: dos (2) años (para quedar con un total de tres (3) años de garantía por equipo), característica 3: Valor unitario por ETP, cantidad total: Cinco (5).



La necesidad concreta que la Secretaría Distrital del Hábitat que pretende satisfacer es asignar los equipos de cómputo y monitores necesarios a los servidores públicos adscritos a la SDHT para el óptimo desempeño de sus actividades.

2. OBJETO A CONTRATAR:

ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA SECRETARÍA DISTRITAL DEL HÁBITAT

3. ESPECIFICACIONES DEL OBJETO:

✓ 1.16. Subcategoría Compraventa de ETP - Portátiles - Sistema operativo Windows:

- Ítem 1, tipo: ETP; característica 1: 13pulgadas PESO MAXIMO 1,5KG, característica 2: Windows 10 de 64 bits, característica 3: Umbral 3000, característica 4: procesamiento Intermedio, característica 5: disco duro mecánico "HDD", característica 6: capacidad 1TB, característica 7: N/A, característica 8: memoria RAM de 16 GB, cantidad total: Veintisiete (27).
- Ítem 2; tipo: Servicio; característica 1: garantía extendida portátiles, característica 2: dos (2) años (para quedar con un total de tres (3) años de garantía por equipo), característica 3: Valor unitario por ETP, cantidad total: Veintisiete (27).





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ESTUDIOS PREVIOS PARA CONTRATACIÓN POR ACUERDO MARCO DE PRECIOS

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

- Ítem 3; tipo: Accesorio; característica 1: guaya de seguridad, cantidad total: Veintisiete (27).
- ✓ 1.6. Subcategoría Compraventa de ETP - AIO - Sistema operativo Windows:
 - Ítem 1, tipo: ETP; característica 1: All in One AIO 23.8pulgadas, característica 2: Windows 10 de 64 bits, característica 3: Umbral 4100, característica 4: procesamiento Avanzado, característica 5: N/A, característica 6: disco duro de estado sólido “SSD”, característica 7: capacidad 500GB PCIe, 500GB PCIe, característica 8: memoria RAM de 16 GB, cantidad total: Cinco (5).
 - Ítem 2, tipo: Accesorio; característica 1: monitor de 27” de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos el cual estará compuesto por puerto HDMI, como se establece en las observaciones generales del simulador de CCE, cantidad total: Uno (1).
 - Ítem 3; tipo: Accesorio; característica: monitores de 23.8” de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos los cuales estarán compuestos por puerto HDMI, como se establece en las observaciones generales del simulador de CCE, cantidad total: ocho (8).
 - Ítem 4; tipo: Servicio; característica 1: garantía extendida equipo de cómputo, característica 2: dos (2) años (para quedar con un total de tres (3) años de garantía por equipo), característica 3: Valor unitario por ETP, cantidad total: Cinco (5).



4. CLASIFICACIÓN DE BIENES Y SERVICIOS:

El objeto contractual se clasifica en los siguientes códigos del clasificador de bienes y servicios UNSPSC en el tercer nivel **CLASES** como se relaciona a continuación:

CODIGOS UNSPSC	GRUPO	SEGMENTOS	FAMILIAS	CLASES
43211503	[E] productos de uso final	[43000000] Difusión de Tecnologías de Información y Telecomunicaciones	[43210000] Equipo informático y accesorios	[43211500] computadores notebook
43211513	[E] productos de uso final	[43000000] Difusión de Tecnologías de Información y Telecomunicaciones	[43210000] Equipo informático y accesorios	[43211500] Computadores personales ultra móviles
43211902	[E] productos de uso final	[43000000] Difusión de Tecnologías de Información y Telecomunicaciones	[43210000] Equipo informático y accesorios	[43211900] Monitores y pantallas de computador





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SECRETARÍA DE HABITAT

ESTUDIOS PREVIOS PARA CONTRATACIÓN POR ACUERDO MARCO DE PRECIOS

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

De conformidad con la información suministrada por el Clasificador de Bienes y Servicios de las Naciones Unidas, tomada de la página www.colombiacompra.gov.co/es/clasificacion.

5. MODALIDAD Y FACTOR DE SELECCIÓN:

Modalidad o forma de selección	Normatividad aplicable	Factores de Selección
Acuerdo Marco de Precios	Decreto 1082 de 2015 (art. 2.2.1.2.1.2.7 y normas concordantes)	Condiciones de precio establecidas en el Acuerdo marco

6. ANÁLISIS JURÍDICO:

Constitución Política de Colombia, Ley 80 de 1993, Ley 1150 de 2007, Ley 1474 de 2011, Decreto 1082 de 2015, normas civiles y comerciales aplicables al tipo del contrato y demás normatividades vigentes.

7. CLASE DE CONTRATO A CELEBRAR: (marque con una x)

Arrendamiento		Obra	
Compra-venta		Suministro	
Consultoría		Prestación de servicios	
Otro		(Indique cual)	

8. VALOR ESTIMADO DEL CONTRATO:

8.2. Variables para calcular el valor del contrato:

Para efectos de determinar el presupuesto oficial estimado del proceso de selección, se procedió a realizar el simulador de precios de acuerdo con la necesidad de la entidad con el Acuerdo Marco de Precios “*Compra o alquiler de Equipos Tecnológicos y Periféricos*” número CCENEG-018-1-2019 con vigencia hasta el 22 de Noviembre 2021 y el cual se debe publicar para la producción del evento.

Se anexa al presente documento la simulación de precios.

9. REQUISITOS HABILITANTES

De conformidad con lo estipulado en el Acuerdo Marco de Precios “*Compra o alquiler de Equipos Tecnológicos y Periféricos*” número CCENEG-018-1-2019



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Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

10. PLAZO DE EJECUCIÓN:

El plazo de ejecución será de 45 días hábiles, según calendario para la zona uno (1) de acuerdo con condiciones transversales del acuerdo marco de precios de CCE.

11. FORMA DE PAGO:

La Secretaría Distrital del Hábitat efectuará los pagos de la siguiente manera:

Los Proveedores deben facturar mensualmente los servicios prestados a la Secretaría Distrital del Hábitat.

Los Proveedores deben presentar las facturas en la carrera 13 No 52-13 correspondencia de la Secretaría Distrital del Hábitat el décimo (10°) día hábil del mes hasta o hasta el día hábil siguiente del mismo mes. Si el día en el cual debe expedirse la factura no es un día hábil, el Proveedor debe expedir la factura el día hábil siguiente.

Adicionalmente, los Proveedores deben publicar copia de la factura en la misma fecha en el aplicativo de la Tienda Virtual del Estado Colombiano TVEC.

La factura debe contener la información necesaria para ser una factura de venta como lo disponen las normas comerciales y tributarias. La factura debe indicar la fecha de inicio y la fecha de corte a la prestación del servicio, para que la Secretaría pueda verificar la información de la factura con el Sistema de Control.

PARÁGRAFO PRIMERO: El Proveedor  presentar como anexo a la factura un certificado suscrito por su representante legal en el cual manifieste que el Proveedor está a paz y salvo con sus obligaciones laborales frente al sistema de seguridad social integral y demás aportes relacionados con sus obligaciones laborales y de los demás documentos internos establecidos para el efecto.

PARÁGRAFO SEGUNDO: El contratista se obliga a cumplir con los lineamientos de la Entidad respecto de las fechas establecidas para solicitud de pago de honorarios.

Los pagos estarán sujetos a la Programación de Recursos del Programa Anual de Caja – PAC y a los recursos disponibles en Tesorería.

En concordancia con lo preceptuado en la cláusula -10 “Facturación y pago” del Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019

12. SUPERVISOR:

La subdirectora administrativa o quien ésta designe.

13. RUBRO PRESUPUESTAL:





ALCALDÍA MAYOR
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SECRETARÍA DE HABITAT

ESTUDIOS PREVIOS PARA CONTRATACIÓN POR ACUERDO MARCO DE PRECIOS

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

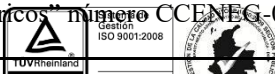
Código presupuestal	Concepto	Fuente de financiación: (Otros Distrito, Plusvalía, etc.	Valor
3-3-1-16-05-56-7754-000	Fortalecimiento Institucional de la Secretaría del Hábitat	12	\$160.000.000

14. CERTIFICADO DE DISPONIBILIDAD PRESUPUESTAL – CDP

No. del CDP	Fecha	Código Presupuestal	Valor
1168	20 de agosto de 2020	3-3-1-16-05-56-7754-000	\$160.000.000

15. OBLIGACIONES ESPECÍFICAS:

El proveedor deberá cumplir todas la obligaciones estipuladas y pactadas en el Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019



16. META DEL PROYECTO:

No. del proyecto de inversión	Nombre del proyecto de inversión	Meta del proyecto de inversión
N/A	N/A	N/A

17. PRODUCTO P.M.R.:

N/A

18. INFORMACIÓN ADICIONAL:

a. Capacidad Financiera: el numeral 2 del artículo 2.2.1.2.1.5.2. del Decreto 1082 de 2015 señala que: “La entidad estatal puede exigir una capacidad financiera mínima cuando no hace el pago contra entrega a satisfacción de los bienes, obras o servicios. Si la entidad estatal exige capacidad financiera debe indicar cómo hará la verificación correspondiente.”.

De conformidad con lo estipulado en el Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019

b. Información complementaria de los estudios de sector:





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De acuerdo con resultado generado por el simulador establecidos en el estudio de sector económico se tienen en cuenta con lo estipulado en el Acuerdo Marco de Precios “*Compra o alquiler de Equipos Tecnológicos y Periféricos*” número CCENEG-018-1-2019

19. EVALUACIÓN DEL RIESGO: Para efectuar el análisis de riesgos consulte el Manual para la Identificación y Cobertura del Riesgo en los Procesos de Contratación elaborado por Colombia Compra Eficiente y lo estipulado en el Acuerdo Marco de Precios “*Compra o alquiler de Equipos Tecnológicos y Periféricos*” número CCENEG-018-1-2019.

No.	Clase	Fuente	Etapas	Tipo	DESCRIPCIÓN (Qué puede pasar y cómo puede ocurrir)	Consecuencia de la ocurrencia del evento	Probabilidad	Impacto	Valoración del Riesgo	Categoría
1	General	Externo	Contratación	Tecnológico	Ocurre cuando se presentan fallas en la disponibilidad del Sistema de Contratación Pública (www.colombiacompra.gov.co) 	Retraso o incumplimiento de los plazos legales para la publicación de los actos y/o documentos derivados de los procesos contractuales 	Posible 3	Insignificante 1	4	Riesgo Bajo
2	General	Externo	Ejecución	Operacional	Ocurre cuando se presentan retrasos o incumplimientos en la entrega de los informes y/o productos a cargo del contratista, con ocasión de la ejecución del contrato.	Afectación de la ejecución del contrato, satisfacción de la necesidad y posible incumplimiento de las obligaciones y actividades pactadas en el contrato.	Posible 3	Mayor 4	7	Riesgo Alto
3	General	Interno	Ejecución	Operacional	Ocurre cuando se presentan demoras por parte de la Entidad en las aprobaciones previas de los productos y/o informes desarrollados por el contratista.	Afecta el cumplimiento de las obligaciones del contratante a cargo del Supervisor del contrato, relacionadas con la aprobación de productos y/o informes, y genera retraso en el trámite de pago a favor del contratista.	Improbable 2	Moderado 3	5	Riesgo Medio
4	General	Interno	Contratación	Financiero	Se presenta cuando la entidad no cuenta con los recursos para pagar el valor del contrato en los plazos establecidos.	Genera mora de la entidad en el pago que puede afectar al contratista, hasta el punto de romper la ecuación económica del contrato.	Raro 1	Menor 2	3	Riesgo Bajo
5	General	Externa	Ejecución	Regulatorio	Se presenta por la expedición de normas que impongan nuevos tributos, impuestos o cargas parafiscales, que pueden afectar el equilibrio económico del contrato.	Genera una carga adicional a las previstas, que puede afectar a cualquiera o a las dos partes del contrato.	Improbable 2	Menor 2	4	Riesgo Bajo

Subsecretaría de Gestión Corporativa y CID
Calle 52 No. 13-64 Piso 12°.
Conmutador: 358 16 00 Ext. 1201
contratacion@habitatbogota.gov.co





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Subsecretaría de Gestión Corporativa y Control Interno Disciplinario Subdirección Administrativa Proceso de Gestión Contractual

Forma de Mitigarlo

No.	¿A quién se le asigna?	Tratamiento/Controles a ser implementados	Impacto después del tratamiento				¿Afecta el equilibrio económico del contrato?	Persona responsable por implementar el tratamiento	Monitoreo y revisión	
			Probabilidad	Impacto	Valoración del Riesgo	Categoría			¿Cómo se realiza el monitoreo?	Periodicidad ¿Cuándo?
1	CONTRATISTA	Reporte al Administrador del SECOP, y dejar evidencia de la interrupción del servicio.	Raro 1	Insignificante 1	2	Riesgo Bajo	Bajo	Subdirección Administrativa	Revisando la Página de SECOP para el cargue de la información	Cada vez que hay que publicar actos administrativos de contratación
2	CONTRATISTA	Seguimiento y verificación del cumplimiento de las obligaciones pactadas en el contrato.	Raro 1	Insignificante 1	2	Riesgo Bajo	No	Supervisor del contrato	A través de la verificación de cumplimiento de las obligaciones del contratista, en los plazos establecidos en el contrato.	Permanente y previo a la expedición del recibo a satisfacción.
3	SDHT	Revisión y aprobación oportuna de la documentación inherente a los productos e informes del contrato.	Raro 1	Insignificante 1	2	Riesgo Bajo	No	Supervisor del contrato	Se establecen comités de seguimiento y supervisión, para la revisión previa de los productos e informes.	Conforme a los plazos contractuales.
4	SDHT	Verificación del valor total del contrato y/o sus adiciones en valor, de manera previa a la expedición del registro presupuestal.	Raro 1	Menor	2	Riesgo Bajo	No	Subdirección Financiera	En el momento de expedir el registro presupuestal al contrato y/o sus adiciones en valor, verificar que los valores correspondan a los del registro presupuestal.	Cada vez que se expide registro presupuestal a un contrato y/o adición.





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5	SDHT CONTRATISTA	Aplicación inmediata de las disposiciones legales y ajuste de los procesos internos de la entidad.	Raro 1	Insignificante 1	2	Riesgo Bajo	No	contratista SDHT	Permanente consulta actualización normativa.	y	Permanente

Para el Análisis de Riesgos se tiene en cuenta lo estipulado en el Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019

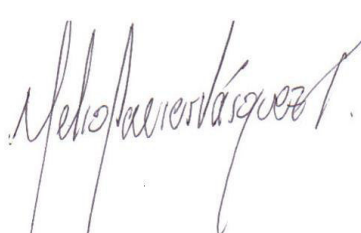
Si considera que no existen riesgos que puedan afectar el equilibrio económico del contrato, justifique:

N/A

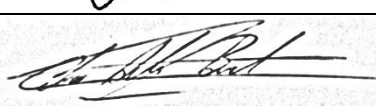
20. GARANTÍAS QUE SE DEBEN EXIGIR AL CONTRATISTA:

De conformidad con lo estipulado en el Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019

21. FIRMAS:

Firma	
Nombre	Nelson Javier Vásquez Torres
Cargo	Subsecretario de Gestión Corporativa y CID

22. FUNCIONARIOS Y/O CONTRATISTAS QUE APOYAN EL PROCESO

Nombre	Cargo	Firma
Julio César Benavides Carranza	Contratista-Subdirección administrativa	
Carlos Andrés Barreto Guzmán	Profesional Especializado-Subdirección Administrativa	

PS07-FO628-V1



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Página 9 de 9

118 - SECRETARÍA DISTRITAL DEL HÁBITAT

01 - UNIDAD 01

CERTIFICADO DE DISPONIBILIDAD PRESUPUESTAL

No. 1168

EL SUSCRITO RESPONSABLE DEL PRESUPUESTO
CERTIFICA

Que en el Presupuesto de Gastos e Inversiones de la vigencia 2020 existe apropiación disponible para atender la presente solicitud así:

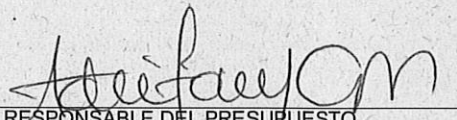
CODIGO PRESUPUESTAL	CONCEPTO	VALOR
3-3-1-16-05-56-7754-000	Fortalecimiento Institucional de la Secretaría del Hábitat Bogotá	160,000,000.00
TOTAL:		160,000,000.00

OBJETO:

Adquisición de equipos tecnológicos para la Secretaría Distrital del Hábitat

Se expide a solicitud de MILDRED CONSTANZA ACUÑA DIAZ, SUBDIRECTORA ADMINISTRATIVA, SUBDIRECCIÓN ADMINISTRATIVA, mediante oficio número 210 de agosto 20 del 2020.

Bogotá D.C., 20 de agosto del 2020.


RESPONSABLE DEL PRESUPUESTO
ADRIANA FANNY ARIZA MEDINA

Compra o alquiler de E... - Evento 93354

Activo

Versiones 93354 - Prod (actual)

Su clasificación no se actualizará mientras esté editando su cotización.

Detenido

12

días

00

hrs

58

mins

24

segs

Analizando cotizaciones

Fin del evento

pausar el evento

Configuración Tiempo Detalles Proveedores Respuestas

La revisión de las secciones de esta ficha creará un evento revisado.

Configuración básica

Nombre del evento

Compra o alquiler de ETP - Categoría

Divisa COP

Más información del evento Ninguno

Logo de la Entidad



Términos y condiciones

<https://community.secop.gov.co/Public/Tender...noticeUID=CO1.NTC.898809&isFromPublicA...>

Este es un evento de cotización del Acuerdo Marco para la compra o Alquiler de ETP- CCE- 925-AMP-2019. La Entidad Compradora debe tener en cuenta que el plazo del Evento de Cotización cuenta desde el día hábil siguiente en el que se realiza la Solicitud de Cotización hasta las 5:00 pm de la fecha en que se cumplen los diez (10) días hábiles. (→ Proveedor)

El proveedor deberá aceptar los términos de forma electrónica

Documentos

Documentos Ninguno relacionados

Objetos personalizados

Ninguno

Información de evento

Etiqueta none

* Mercancía del evento Compra de ETP II

Exención de costos 0,00 COP

Ahorros planificados 0,00 COP

Segmento Compra-venta AIO- Sistema operativo Windows

* Grupos de contenido ☒ Todos

☐

Solamente miembros de estos grupos de contenido

Elegir grupos

Equipo del evento

Mildred Constanza Acuña Díaz Creador
Omar Francisco Ferrer Propietario
Sergio Andres Peña Aristizábal observador
Mesa Ayuda observador

Proyectos y tareas

[Agregar proyecto](#)

[Agregar tarea](#)

Respuesta del proveedor

Datos adjuntos

Sección de adjuntos

Nombre del adjunto

Simulador de Compra o alquiler de ETP

Archivo adjunto

68.amp-etp2g-v18-02092020_AIO_y_m...

- ☒ Permitir
- ☒ Hacer q

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

CDP_1168_MILDRED_ACUÑA_210.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

ESTUDIO_PREVIO_FINAL_.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Formularios

No hay formularios para este evento

Artículos y lotes

Mensaje de CASTOR DATA SAS
October 02, 2020 17:48

"Cordial saludo, señores Secretaria Distrital del Hábitat

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27" como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD."

☐
Nombre
Cantidad esperada
Precio base
Precio x Cantidad esperada
☐
5 elementos (que no están en lotes)
☐
etc02--lote1.6-ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1
5,0000
(Unidad)
x
3.449.468,00
COP
=
17.247.340,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA NA Zona 1
1,0000
(Unidad)
x
728.481,00
COP
=
728.481,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA NA Zona 1
8,0000
(Unidad)
x
491.173,00
COP
=
3.929.384,00
COP
☐
etc02--lote1.6-SERVICIO Garantia extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA Zona 1
5,0000
(Unidad)
x
31.120,00
COP
=
155.600,00
COP
☐
etc02--IVA
1,0000
(Unidad)
x
4.191.552,95
COP
=
4.191.552,95
COP
Precio total inicial
0,00
COP
Aumento incremental
0,00
COP
Total de la base
26.252.357,95
COP

Zona horaria del evento

America - Bogota (-05; UTC-5)

Inicio del eventoFin del evento

29/09/20

11:25

☒ Iniciar evento al 'Enviar'

14/10/20

17:30

Expandir todos

Contraer todos

Linea de tiempo

25/09/20 17:45America/Bogota3d : 17h : 39min

Configuración del evento

0Tareas

0Comentarios

29/09/20 11:25America/Bogota15d : 6h : 4min

Agregar tarea

RFQ

0Tareas

0Comentarios

14/10/20 17:30America/Bogota

Agregar tarea

Evaluación

0Tareas

0Comentarios

Proveedores

Agregar tarea

Perspectivas del proveedor

Vista

Todo

Avanzado

Buscar

↩

Enviar correo electrónico

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	06/12/19	CASTOR DATA SAS	Monica Maria Bedoya Gomez	monica.bedoya@casto...	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	COLOMBIANA DE SOFTWARE Y HARDWARE COLSOF S.A	Luis Felipe Lugo Bonilla	ccecolsof@colsof.co...	Volver a enviar la invitación	2 de 2 aceptados		
☐	06/12/19	DISCOMPUCOL SAS	DARIO AUZA	corporativo@discomp...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Grupo Empresarial Crear de Colombia S.A.S.	Luis Alberto Huertas	colombiacompra@crea...	1	2 de 2 aceptados		
☐	06/12/19	HARDWARE ASESORIAS SOFTWARE LTDA	LUZ AMPARO LIZARAZO BUENO	amparo.lizarazo@has...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Key Market S.A.S.	Enver Josue Caro Vega	ecaro@keymarket.com.co	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Microhard S.A.S.	ANDRES FERNANDO SIMBAQUEBA QUITORA	comercial@microhard...	Volver a enviar la invitación	0 de 2 aceptados		

2/10/2020

Compra o alquiler de E... - Evento 93354

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	05/12/19	NEX COMPUTER S.A.S.	MIGUEL ANTONIO CASTIBLANCO	JURIDICO@NEX.COM.CO	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Nueva Era Soluciones S.A.S.	Jennifer Rodriguez	asistente.gobierno@...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	P&P Systems Colombia S.A.S.	Monica Cubillos	licitaciones@pypsys...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Pear Solutions S.A.S.	Natalia L. Holguin O	comercial.cce@pears...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Sistetronics Ltda.	Johnny Ramos	cce@sistetronics.com	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Tecnophone Colombia S.A.S.	Nestor Javier Florez MARIÑO	gerencia@tecnophone.co	Volver a enviar la invitación	0 de 2 aceptados		
☐	06/12/19	UNION TEMPORAL DATACOL	John Fredy Robayo Ramirez	licitaciones@sisdat...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Uniples S.A.	Hector Espejo	hector.espejo@unipl...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	UT SERTAL CCE TECNOLOGÍA	LIDA PATRICIA CARDENAS LADINO	licitaciones@serlec...	Volver a enviar la invitación	0 de 2 aceptados		

Por página 15 | 45 | 90

Escriba el nombre de un artículo para ane

Nombre del artículo

Tendencias de la comunidad de
proveedores

8.101

Proveedores activos

16.442

Nuevos proveedores de la comunidad

60

Proveedores de Coupa Advantage

*Todo el contenido se proporciona con fines informativos únicamente y Coupa no puede garantizar su precisión, integridad, calidad o pertinencia. Coupa no respalda proveedores y usted debe hacer su propio juicio con respecto a, y asumir todos los riesgos asociados con, interactuar con proveedores. Bajo ninguna circunstancia Coupa será responsable por el contenido de esta página, incluyendo cualquier error u omisión de contenido o pérdida o daño incurridos como resultado de utilizar dicho contenido.

Ponderaciones de evaluación

Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos.
Ponderaciones de evaluación

Equipo de evaluación

Agregar ponderaciones

Agregue evaluadores e invítelos a asignar a una puntuación a respuestas de proveedores.

☒ Autorizar a los evaluadores a ver el evento

Resumen de evaluación

Agregar evaluador

Solicitar evaluación

Configuración de visibilidad del evaluador

Los detalles de la evaluación pueden descargarse después de que se especifiquen las ponderaciones y que al menos un evaluador haya actualizado la evaluación.

Detalles de evaluación

[Descargar detalles de evaluación](#)

Cargar ponderaciones de evaluación de evento

Siga estos pasos para agregar ponderaciones de evaluación de eventos:

1. [descargar](#) plantilla de evaluación de evento.
2. Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos a la plantilla y guárdelos.
3. Para cargar la plantilla, haga clic en **Elegir archivo** y seleccione el archivo. Haga clic en **Cargar**.

Ponderaciones de evaluación

[Seleccionar archivo](#) Ningún archivo seleccionado

[Cancelar](#)

[Cargar](#)

La revisión de las secciones de esta ficha creará un evento revisado.

0 Comentarios

Historial

1

Mensajes

De: CASTOR DAT... hace 4 horas

"Cordial saludo, señores Secretaria Distrital del Hábitat

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. ...

[leer más](#)

Para:

Escribir un nuevo mensaje

[Enviar un mensaje](#)

Adjuntar archivos¿ Tiene problemas técnicos? Contacto
sourcing.support@coupa.com

Compra o alquiler de E... - Evento 93354 Activo

Versiones 93354 - Prod (actual)

Su clasificación no se actualizará mientras esté editando su cotización.

Detenido

9

días

06

hrs

52

mins

50

segs

Analizando cotizaciones

Fin del evento

 pausar el evento

[Configuración](#) [Tiempo](#) [Detalles](#) [Proveedores](#) [Respuestas](#)

La revisión de las secciones de esta ficha creará un evento revisado.

Configuración básica

Nombre del evento

Compra o alquiler de ETP - Categoría

Divisa COP

Más información del evento Ninguno

Logo de la Entidad



Términos y condiciones

<https://community.secop.gov.co/Public/Tender...noticeUID=CO1.NTC.898809&isFromPublicA...>

Este es un evento de cotización del Acuerdo Marco para la compra o Alquiler de ETP- CCE- 925-AMP-2019. La Entidad Compradora debe tener en cuenta que el plazo del Evento de Cotización cuenta desde el día hábil siguiente en el que se realiza la Solicitud de Cotización hasta las 5:00 pm de la fecha en que se cumplen los diez (10) días hábiles. (→ Proveedor)

El proveedor deberá aceptar los términos de forma electrónica

Documentos

Documentos Ninguno relacionados

Objetos personalizados

Ninguno

Información de evento

Etiqueta none

* Mercancía del evento Compra de ETP II

Exención de costos 0,00 COP

Ahorros planificados 0,00 COP

Segmento Compra-venta AIO- Sistema operativo Windows

* Grupos de contenido ☒ Todos

☐ Solamente miembros de estos grupos de contenido
[Elegir grupos](#)

Equipo del evento

Mildred Constanza Acuña Díaz Creador
Omar Francisco Ferrer Propietario
Sergio Andres Peña Aristizábal observador
Mesa Ayuda observador

Proyectos y tareas

[Agregar proyecto](#) [Agregar tarea](#)

Mensaje de P&P Systems Colombia S.A.S.

October 02, 2020 21:59

Buenas Tardes

Sección de adjuntos

Nombre del adjunto

Simulador de Compra o alquiler de ETP

Archivo adjunto

68.amp-etp2g-v18-02092020_AIO_y_m...

- ☒ Permitir
- ☒ Hacer q

Respetados Señores

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27" como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD."

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

CDP_1168_MILDRED_ACUÑA_210.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

ESTUDIO_PREVIO_FINAL_.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Formularios

No hay formularios para este evento

Artículos y lotes

☐
Nombre
Cantidad esperada
Precio base
Precio x Cantidad esperada
☐
5 elementos (que no están en lotes)
☐
etc02--lote1.6-ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1
5,0000
(Unidad)
x
3.449.468,00
COP
=
17.247.340,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA NA Zona 1
1,0000
(Unidad)
x
728.481,00
COP
=
728.481,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA NA Zona 1
8,0000
(Unidad)
x
491.173,00
COP
=
3.929.384,00
COP
☐
etc02--lote1.6-SERVICIO Garantia extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA Zona 1
5,0000
(Unidad)
x
31.120,00
COP
=
155.600,00
COP
☐
etc02--IVA
1,0000
(Unidad)
x
4.191.552,95
COP
=
4.191.552,95
COP
Precio total inicial
0,00
COP
Aumento incremental
0,00
COP
Total de la base
26.252.357,95
COP

Zona horaria del evento

America - Bogota (-05; UTC-5)

Inicio del eventoFin del evento

29/09/20

11:25

☒ Iniciar evento al 'Enviar'

14/10/20

17:30

Expandir todos

Contraer todos

Linea de tiempo

25/09/20 17:45America/Bogota3d : 17h : 39min

Configuración del evento

0Tareas

0Comentarios

29/09/20 11:25America/Bogota15d : 6h : 4min

Agregar tarea

RFQ

0Tareas

0Comentarios

14/10/20 17:30America/Bogota

Agregar tarea

Evaluación

0Tareas

0Comentarios

[Proveedores](#)

Agregar tarea

Perspectivas del proveedor

Vista

Todo

Avanzado

Buscar

↩

Enviar correo electrónico

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	06/12/19	CASTOR DATA SAS	Monica Maria Bedoya Gomez	monica.bedoya@casto...	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	COLOMBIANA DE SOFTWARE Y HARDWARE COLSOF S.A	Luis Felipe Lugo Bonilla	ccecolsof@colsof.co...	Volver a enviar la invitación	2 de 2 aceptados		
☐	06/12/19	DISCOMPUCOL SAS	DARIO AUZA	corporativo@discomp...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Grupo Empresarial Crear de Colombia S.A.S.	Luis Alberto Huertas	colombiacompra@crea...	1	2 de 2 aceptados		
☐	06/12/19	HARDWARE ASESORIAS SOFTWARE LTDA	LUZ AMPARO LIZARAZO BUENO	amparo.lizarazo@has...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Key Market S.A.S.	Enver Josue Caro Vega	ecaro@keymarket.com.co	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Microhard S.A.S.	ANDRES FERNANDO SIMBAQUEBA QUITORA	comercial@microhard...	1	2 de 2 aceptados		

5/10/2020

Compra o alquiler de E... - Evento 93354

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	05/12/19	NEX COMPUTER S.A.S.	MIGUEL ANTONIO CASTIBLANCO	JURIDICO@NEX.COM.CO	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Nueva Era Soluciones S.A.S.	Jennifer Rodriguez	asistente.gobierno@...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	P&P Systems Colombia S.A.S.	Monica Cubillos	licitaciones@pypsys...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Pear Solutions S.A.S.	Natalia L. Holguin O	comercial.cce@pears...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Sistetronics Ltda.	Johnny Ramos	cce@sistetronics.com	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Tecnophone Colombia S.A.S.	Nestor Javier Florez MARIÑO	gerencia@tecnophone.co	Volver a enviar la invitación	0 de 2 aceptados		
☐	06/12/19	UNION TEMPORAL DATACOL	John Fredy Robayo Ramirez	licitaciones@sisdat...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Uniples S.A.	Hector Espejo	hector.espejo@unipl...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	UT SERTAL CCE TECNOLOGÍA	LIDA PATRICIA CARDENAS LADINO	licitaciones@serlec...	Volver a enviar la invitación	0 de 2 aceptados		

Por página 15 | 45 | 90

Perspectivas conducidas por inteligencia de la comunidad

Escriba el nombre de un artículo para ane

Nombre del artículo

Tendencias de la comunidad de proveedores

8.962

Proveedores activos

17.517

Nuevos proveedores de la comunidad

60

Proveedores de Coupa Advantage

*Todo el contenido se proporciona con fines informativos únicamente y Coupa no puede garantizar su precisión, integridad, calidad o pertinencia. Coupa no respalda proveedores y usted debe hacer su propio juicio con respecto a, y asumir todos los riesgos asociados con, interactuar con proveedores. Bajo ninguna circunstancia Coupa será responsable por el contenido de esta página, incluyendo cualquier error u omisión de contenido o pérdida o daño incurridos como resultado de utilizar dicho contenido.

Ponderaciones de evaluación

Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos.
Ponderaciones de evaluación

Equipo de evaluación

Agregar ponderaciones

Agregue evaluadores e invítelos a asignar a una puntuación a respuestas de proveedores.
☒ Allow evaluators to view the event

Resumen de evaluación

[Agregar evaluador](#)[Solicitar evaluación](#)[Configuración de visibilidad del evaluador](#)

Los detalles de la evaluación pueden descargarse después de que se especifiquen las ponderaciones y que al menos un evaluador haya actualizado la evaluación.

Detalles de evaluación[Descargar detalles de evaluación](#)

Cargar ponderaciones de evaluación de evento

Siga estos pasos para agregar ponderaciones de evaluación de eventos:

1. [descargar](#) plantilla de evaluación de evento.
2. Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos a la plantilla y guárdelos.
3. Para cargar la plantilla, haga clic en **Elegir archivo** y seleccione el archivo. Haga clic en **Cargar**.

Ponderaciones de evaluación[Seleccionar archivo](#) Ningún archivo seleccionado[Cancelar](#)[Cargar](#)

La revisión de las secciones de esta ficha creará un evento revisado.

0 Comentarios

Historial

3

Mensajes

De: CASTOR DAT... hace 3 días

"Cordial saludo, señores Secretaria Distrital del Hábitat

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. ...

[Leer más](#)

De: P&P System... hace 3 días

Buenas Tardes

Respetados Señores

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad re...

[Leer más](#)

De: Uniples S.... hace 3 días

Buenas tardes

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor d...

[Leer más](#)

Para:

Escribir un nuevo mensaje

[Enviar un mensaje](#)

Adjuntar archivos¿ Tiene problemas técnicos? Contacto
sourcing.support@coupa.com

Compra o alquiler de E... - Evento 93354 Activo

Versiones 93354 - Prod (actual)

Su clasificación no se actualizará mientras esté editando su cotización.

Detenido

9

días

06

hrs

51

mins

25

segs

Analizando cotizaciones

Fin del evento

 pausar el evento

[Configuración](#) [Tiempo](#) [Detalles](#) [Proveedores](#) [Respuestas](#)

La revisión de las secciones de esta ficha creará un evento revisado.

Configuración básica

Nombre del evento

Compra o alquiler de ETP - Categoría

Divisa COP

Más información del evento Ninguno

Logo de la Entidad



Términos y condiciones

<https://community.secop.gov.co/Public/Tender...noticeUID=CO1.NTC.898809&isFromPublicA...>

Este es un evento de cotización del Acuerdo Marco para la compra o Alquiler de ETP- CCE- 925-AMP-2019. La Entidad Compradora debe tener en cuenta que el plazo del Evento de Cotización cuenta desde el día hábil siguiente en el que se realiza la Solicitud de Cotización hasta las 5:00 pm de la fecha en que se cumplen los diez (10) días hábiles. (→ Proveedor)

El proveedor deberá aceptar los términos de forma electrónica

Documentos

Documentos Ninguno relacionados

Objetos personalizados

Ninguno

Información de evento

Etiqueta none

* Mercancía del evento Compra de ETP II

Exención de costos 0,00 COP

Ahorros planificados 0,00 COP

Segmento Compra-venta AIO- Sistema operativo Windows

* Grupos de contenido ☒ Todos

☐

Solamente miembros de estos grupos de contenido

[Elegir grupos](#)

Equipo del evento

Mildred Constanza Acuña Díaz Creador
Omar Francisco Ferrer Propietario
Sergio Andres Peña Aristizábal observador
Mesa Ayuda observador

Proyectos y tareas

[Agregar proyecto](#)

[Agregar tarea](#)

Mensaje de Uniples S.A.

October 02, 2020 23:55

Buenas tardes

Sección de adjuntos

Nombre del adjunto

Simulador de Compra o alquiler de ETP

Archivo adjunto

68.amp-etp2g-v18-02092020_AIO_y_m...

- ☒ Permitir
- ☒ Hacer q

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27" como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD."

saludos

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

CDP_1168_MILDRED_ACUÑA_210.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Sección de adjuntos

Nombre del adjunto

Archivo adjunto

ESTUDIO_PREVIO_FINAL_.pdf

- ☒ Permitir al proveedor responder con un adjunto
- ☐ Hacer que sea obligatoria la respuesta.

Formularios

No hay formularios para este evento

Artículos y lotes

☐
Nombre
Cantidad esperada
Precio base
Precio x Cantidad esperada
☐
5 elementos (que no están en lotes)
☐
etc02--lote1.6-ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1
5,0000
(Unidad)
x
3.449.468,00
COP
=
17.247.340,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA NA Zona 1
1,0000
(Unidad)
x
728.481,00
COP
=
728.481,00
COP
☐
etc02--lote1.6-ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA NA Zona 1
8,0000
(Unidad)
x
491.173,00
COP
=
3.929.384,00
COP
☐
etc02--lote1.6-SERVICIO Garantia extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA Zona 1
5,0000
(Unidad)
x
31.120,00
COP
=
155.600,00
COP
☐
etc02--IVA
1,0000
(Unidad)
x
4.191.552,95
COP
=
4.191.552,95
COP
Precio total inicial
0,00
COP
Aumento incremental
0,00
COP
Total de la base
26.252.357,95
COP

Zona horaria del evento

America - Bogota (-05; UTC-5)

Inicio del eventoFin del evento

29/09/20

11:25

☒ Iniciar evento al 'Enviar'

14/10/20

17:30

Expandir todos

Contraer todos

Linea de tiempo

25/09/20 17:45America/Bogota3d : 17h : 39min

Configuración del evento

0Tareas

0Comentarios

29/09/20 11:25America/Bogota15d : 6h : 4min

Agregar tarea

RFQ

0Tareas

0Comentarios

14/10/20 17:30America/Bogota

Agregar tarea

Evaluación

0Tareas

0Comentarios

Proveedores

Agregar tarea

Perspectivas del proveedor

Vista

Todo

Avanzado

Buscar

↩

Enviar correo electrónico

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	06/12/19	CASTOR DATA SAS	Monica Maria Bedoya Gomez	monica.bedoya@casto...	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	COLOMBIANA DE SOFTWARE Y HARDWARE COLSOF S.A	Luis Felipe Lugo Bonilla	ccecolsof@colsof.co...	Volver a enviar la invitación	2 de 2 aceptados		
☐	06/12/19	DISCOMPUCOL SAS	DARIO AUZA	corporativo@discomp...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Grupo Empresarial Crear de Colombia S.A.S.	Luis Alberto Huertas	colombiacompra@crea...	1	2 de 2 aceptados		
☐	06/12/19	HARDWARE ASESORIAS SOFTWARE LTDA	LUZ AMPARO LIZARAZO BUENO	amparo.lizarazo@has...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Key Market S.A.S.	Enver Josue Caro Vega	ecaro@keymarket.com.co	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Microhard S.A.S.	ANDRES FERNANDO SIMBAQUEBA QUITORA	comercial@microhard...	1	2 de 2 aceptados		

5/10/2020

Compra o alquiler de E... - Evento 93354

☐	Se agregó la fecha	Nombre	Nombre del contacto	Correo electrónico	Nro. de respuestas	Términos y condiciones	Visto por última vez	Contr
☐	05/12/19	NEX COMPUTER S.A.S.	MIGUEL ANTONIO CASTIBLANCO	JURIDICO@NEX.COM.CO	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Nueva Era Soluciones S.A.S.	Jennifer Rodriguez	asistente.gobierno@...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	P&P Systems Colombia S.A.S.	Monica Cubillos	licitaciones@pypsys...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	Pear Solutions S.A.S.	Natalia L. Holguin O	comercial.cce@pears...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Sistetronics Ltda.	Johnny Ramos	cce@sistetronics.com	Volver a enviar la invitación Responderá	2 de 2 aceptados		
☐	06/12/19	Tecnophone Colombia S.A.S.	Nestor Javier Florez MARIÑO	gerencia@tecnophone.co	Volver a enviar la invitación	0 de 2 aceptados		
☐	06/12/19	UNION TEMPORAL DATACOL	John Fredy Robayo Ramirez	licitaciones@sisdat...	Volver a enviar la invitación	0 de 2 aceptados		
☐	05/12/19	Uniples S.A.	Hector Espejo	hector.espejo@unipl...	Volver a enviar la invitación	2 de 2 aceptados		
☐	05/12/19	UT SERTAL CCE TECNOLOGÍA	LIDA PATRICIA CARDENAS LADINO	licitaciones@serlec...	Volver a enviar la invitación	0 de 2 aceptados		

Por página 15 | 45 | 90

Perspectivas conducidas por inteligencia de la comunidad

Escriba el nombre de un artículo para ane

Nombre del artículo

Tendencias de la comunidad de proveedores

8.962

Proveedores activos

17.517

Nuevos proveedores de la comunidad

60

Proveedores de Coupa Advantage

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Ponderaciones de evaluación

Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos.

Ponderaciones de evaluación

Equipo de evaluación

Agregar ponderaciones

Agregue evaluadores e invítelos a asignar a una puntuación a respuestas de proveedores.

☒ Allow evaluators to view the event

Resumen de evaluación

[Agregar evaluador](#)[Solicitar evaluación](#)[Configuración de visibilidad del evaluador](#)

Los detalles de la evaluación pueden descargarse después de que se especifiquen las ponderaciones y que al menos un evaluador haya actualizado la evaluación.

Detalles de evaluación[Descargar detalles de evaluación](#)

Cargar ponderaciones de evaluación de evento

Siga estos pasos para agregar ponderaciones de evaluación de eventos:

1. [descargar](#) plantilla de evaluación de evento.
2. Agregue ponderaciones de evaluación a artículos, formularios y datos adjuntos a la plantilla y guárdelos.
3. Para cargar la plantilla, haga clic en **Elegir archivo** y seleccione el archivo. Haga clic en **Cargar**.

Ponderaciones de evaluación Ningún archivo seleccionado

La revisión de las secciones de esta ficha creará un evento revisado.

0 Comentarios

Historial

3

Mensajes

De: CASTOR DAT... hace 3 días

"Cordial saludo, señores Secretaria Distrital del Hábitat

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. ...

[leer más](#)

De: P&P System... hace 3 días

Buenas Tardes

Respetados Señores

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad re...

[leer más](#)

De: Uniples S.... hace 3 días

Buenas tardes

El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor d...

[leer más](#)

Para:

Adjuntar archivos¿ Tiene problemas técnicos? Contacto
sourcing.support@coupa.com

Bogotá, D.C.

Empresa Castor Data S.A.S

Asunto: respuesta observación proceso compra equipos evento 93354 en Colombia
Compra Eficiente

Respetados Empresa Castor Data S.A.S

La empresa Castor Data S.A.S Presentó la siguiente Observación: fecha 02 de octubre de 2020 17:48 "Cordial saludo, señores Secretaria Distrital del Hábitat El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27" como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD."

En respuesta a la observación presentada acerca del anexo 9 del Acuerdo Marco, del ítem No.11 en donde se exige que los monitores de 23.8 pulgadas tenga como mínimo resolución 4K. La entidad realizó la respectiva revisión del acuerdo marco y se comunicó con la línea telefónica de soporte de CCE para validación de la observación presentada, en donde estos indican que en este anexo "Los accesorios definidos en el presente anexo son de obligatorio ofrecimiento indistintamente de la subcategoría de cómputo en la que presente oferta el Proveedor". Por ende, no es viable.

Cordialmente,

Elaboró: Julio César Benavides Carranza – Contratista Subdirección Administrativa
Revisó: Carlos Andrés Barreto Guzmán – Profesional Especializado Subdirección Adminis

Bogotá, D.C.

Empresa P&P Systems Colombia S.A.S.

Asunto: respuesta observación proceso compra equipos evento 93354 en Colombia
Compra Eficiente

Respetados Empresa P&P Systems Colombia S.A.S

La empresa P&P Systems Colombia S.A.S Presentó la siguiente Observación: fecha 02 de octubre de 2020 21:59 “El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27” como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD.”” como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD.”

En respuesta a la observación presentada acerca del anexo 9 del Acuerdo Marco, del ítem No.11 en donde se exige que los monitores de 23.8 pulgadas tenga como mínimo resolución 4K. La entidad realizó la respectiva revisión del acuerdo marco y se comunicó con la línea telefónica de soporte de CCE para validación de la observación presentada, en donde estos indican que en este anexo “Los accesorios definidos en el presente anexo son de obligatorio ofrecimiento indistintamente de la subcategoría de cómputo en la que presente oferta el Proveedor”. Por ende, no es viable.

Cordialmente,

Elaboró: Julio César Benavides Carranza – Contratista Subdirección Administrativa
Revisó: Carlos Andrés Barreto Guzmán – Profesional Especializado Subdirección Administra

Bogotá, D.C.

Empresa Uniples S.A.

Asunto: respuesta observación proceso compra equipos evento 93354 en Colombia
Compra Eficiente

Respetados Empresa Uniples S.A.

La empresa Uniples S.A.S Presentó la siguiente Observación: fecha 02 de octubre de 2020 23:55 “El anexo 9 del Acuerdo Marco, exige que el monitor adicional de 23.8 pulgadas tenga como mínimo resolución 4K. Por tanto, la Entidad recibirá un monitor de 23.8 FHD y el de 27” como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD.” como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD.” como accesorio 4K. En pro de mejorar la oferta económica, se sugiere a la Entidad aceptar los monitores de 23.8 FHD.”

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Cordialmente,

Elaboró: Julio César Benavides Carranza – Contratista Subdirección Administrativa
Revisó: Carlos Andrés Barreto Guzmán – Profesional Especializado Subdirección Administrativa

Acta de Designación Comité Evaluador

**EL SUBSECRETARIO DE GESTIÓN CORPORATIVA Y CONTROL INTERNO DISCIPLINARIO DE LA
SECRETARÍA DISTRITAL DEL HÁBITAT**

Facultado para expedir los actos administrativos inherentes a la actividad precontractual, contractual y postcontractual, según Resolución de Delegación No. 525 del 22 de abril del 2016 aclarada por la Resolución No. 1439 del 2016, y

CONSIDERANDO

De conformidad con el artículo 2.2.1.1.2.2.3. del Decreto Único Reglamentario 1082 de 2015 y normas concordantes, es necesario llevar a cabo la conformación de un Comité Evaluador, integrado por servidores públicos o particulares contratados para el efecto, con el fin de que evalúen técnica y económicamente las ofertas de manera objetiva de conformidad con los criterios señalados en el Acuerdo Marco vigente para “Compra o alquiler de equipos tecnológicos y periféricos CCENEG-018-1-2019, con vigencia hasta el 22 de noviembre de 2021”. Evento No. 93354. Así mismo, de acuerdo con los resultados de la evaluación, el Comité recomendará la adjudicación al Ordenador del Gasto.

Por lo anteriormente expuesto, en cumplimiento de los principios de economía, transparencia, responsabilidad y el deber de selección objetiva, dispuestos en el Estatuto General de Contratación de la Administración Pública:

DISPONE:

PRIMERO: Designar el Comité Evaluador para el proceso de contratación por Acuerdo Marco de Precios “Evento No. 93354”, cuyo objeto es: **“ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA SECRETARÍA DISTRITAL DEL HÁBITAT”**, el cual estará integrado por profesionales de la Secretaría Distrital del Hábitat, en los aspectos técnicos y económicos, así:

1. Julio César Benavides Carranza / Contratista Subdirección Administrativa
2. Carlos Andrés Barreto Guzmán / Profesional Especializado Subdirección Administrativa

SEGUNDO: Indicar que los integrantes del comité tendrán las siguientes funciones:

1. Realizar la evaluación de las ofertas en sus aspectos técnicos y económicos de acuerdo con su especialidad, competencias, de manera independiente y conforme los lineamientos de Colombia Compra Eficiente.
2. Llevar a cabo una revisión integral de la evaluación de las ofertas presentadas en el proceso, a efectos de recomendar la decisión a adoptar por parte de la Entidad.
3. Estudiar y dar respuesta a las observaciones presentadas por los proponentes, si las hubiere, a los informes de evaluación y verificación de las ofertas, de acuerdo con su especialidad.
4. Mantener la correspondiente reserva y confidencialidad en desarrollo de su gestión como evaluador.

Acta de Designación Comité Evaluador

5. El Comité Asesor y Evaluador estará sujeto a las inhabilidades e incompatibilidades y conflictos de intereses legales.

TERCERO: Comunicar mediante correo electrónico la presente Acta a los integrantes del Comité Evaluador

El presente documento se expide a los catorce (14) días del mes de octubre de dos mil veinte (2020).

NELSON JAVIER VÁSQUEZ TORRES
Subsecretario de Gestión Corporativa y CID

Elaboró: Giohana Catarine González Turizo. – Contratista Subdirección Administrativa 
Revisó: Diana Herlinda Quintero Preciado - Contratista Subdirección Administrativa 
Revisó: Angela Rossio Parada - Contratista Subsecretaría de Gestión Corporativa y CID
Aprobó: Mildred Constanza Acuña Díaz– Subdirectora Administrativa.

**CONSOLIDADO INFORME DE EVALUACIÓN PRELIMINAR
EVENTO 93354**

OBJETO: “ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA SECRETARÍA DISTRITAL DEL HÁBITAT”.

ALCANCE DEL OBJETO:

Teniendo en cuenta las siguientes consideraciones:

Los integrantes del comité evaluador realizaron la verificación de los requisitos de aspectos técnicos y económicos de los proponentes de acuerdo con las competencias que les corresponden y conforme a lo establecido en Colombia Compra Eficiente en el Acuerdo Marco de Precios CCENEG-018-1-2019 y las condiciones para comprar al amparo del Acuerdo Marco de compra o alquiler de Equipos Tecnológicos y Periféricos. Acuerdo CCE- 925-AMP-2019. En la cual se requiere la adquisición de los siguientes elementos tecnológicos:

- Cinco (5) computadores All in One (AIO) de referencia 1.6 según el Acuerdo Marco para la adquisición de computadores y periféricos, los cuales estarán compuestos por: Sistema operativo Windows 10 de 64 bits, procesamiento Avanzado, memoria RAM de 16 GB y disco duro de estado sólido de 500GB PCIe, con adición de servicio de garantía extendida por dos (2) años más, para quedar con un total de tres (3) años de garantía por equipo.
- Un (1) monitor de 27” de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos el cual estará compuesto por puerto HDMI.
- ocho (8) monitores de 23.8” de referencia 2.2 según el Acuerdo Marco para la adquisición de computadores y periféricos los cuales estarán compuestos por puerto HDMI

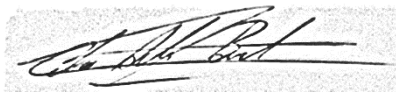
Que mediante Comunicación Interna se designó el Comité Evaluador del evento 93354.

Que el día 14 de octubre de 2020 se surtió a través de la plataforma de Colombia Compra Eficiente el cierre del proceso, en el cual se presentaron 15 proponentes:

No.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Cantidad solicitada
PROPONENTE	NEX COMPUTER S.A.S.	Sistetronics Ltda.	Key Market S.A.S.	DISCOMPUCOL SAS	Nueva Era Soluciones S.A.S.	Grupo Empresarial Crear de Colombia S.A.S.	HARDWARE ASESORIAS SOFTWARE LTDA	COLOMBIA DE SOFTWARE Y HARDWARE COLOMBIA S.A.S.	Uniplex S.A.	P&P Systems Colombia S.A.S.	CASTOR DATA SAS	Microhard S.A.S.	UT SERTAL CCE TECNOLOGÍA	Pear Solutions S.A.S.	Tecnophone Colombia S.A.S.	N/A
ID	518923	518940	518942	518948	518976	519043	519178	519542	519768	520054	520840	520981	521721	525655	525923	N/A
Precio unitario del proveedor para "etc02-lote1.6-ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1":	\$ 4.406.332,00	\$ 3.449.468,00	\$ 3.900.610,00	\$ 4.172.810,00	\$ 3.838.522,00	\$ 3.655.783,00	\$ 3.679.006,00	\$ 3.425.349,00	\$ 3.660.056,00	\$ 3.076.367,00	\$ 3.206.782,00	\$ 3.693.951,00	\$ 2.879.867,00	\$ 3.810.993,00	\$ 3.200.000,00	5
Precio unitario del proveedor para "etc02-lote1.6-ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA Zona 1":	\$ 1.080.804,00	\$ 728.481,00	\$ 2.416.760,00	\$ 1.713.754,00	\$ 1.656.224,00	\$ 797.045,00	\$ 1.482.033,00	\$ 1.729.979,00	\$ 1.868.714,00	\$ 2.420.818,00	\$ 1.106.778,00	\$ 1.489.378,00	\$ 685.043,00	\$ 1.526.107,00	\$ 486.000,00	1
Precio unitario del proveedor para "etc02-lote1.6-ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA Zona 1":	\$ 507.884,00	\$ 491.173,00	\$ 2.416.760,00	\$ 1.695.041,00	\$ 901.763,00	\$ 537.401,00	\$ 806.971,00	\$ 1.513.693,00	\$ 1.543.818,00	\$ 2.335.125,00	\$ 1.106.778,00	\$ 586.372,00	\$ 542.442,00	\$ 834.198,00	\$ 537.000,00	8
Precio unitario del proveedor para "etc02-lote1.6-SERVICIO Garantía extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA Zona 1":	\$ 104.530,00	\$ 31.120,00	\$ 39.628,00	\$ 98.548,00	\$ 112.759,00	\$ 152.729,00	\$ 124.149,00	\$ 72.095,00	\$ 95.228,00	\$ 124.683,00	\$ 101.950,00	\$ 44.440,00	\$ 29.359,00	\$ 456.432,00	\$ 112.000,00	5
Precio unitario del proveedor para "etc02-IVA":	\$ 5.262.713,00	\$ 4.191.552,95	\$ 7.875.886,00	\$ 6.959.866,00	\$ 5.439.080,00	\$ 4.586.376,00	\$ 5.121.180,00	\$ 5.952.081,00	\$ 6.269.179,00	\$ 7.050.343,00	\$ 5.035.887,00	\$ 4.725.738,00	\$ 3.718.435,00	\$ 5.611.994,00	\$ 4.054.980,00	1
valor total oferta proponente	\$ 32.961.199,00	\$ 26.252.357,95	\$ 49.327.916,00	\$ 43.590.738,00	\$ 34.065.813,00	\$ 28.725.189,00	\$ 32.074.756,00	\$ 37.278.824,00	\$ 39.264.857,00	\$ 44.157.411,00	\$ 31.540.549,00	\$ 29.598.047,00	\$ 23.289.144,00	\$ 35.148.810,00	\$ 25.396.980,00	20

Se recomienda al ordenador del gasto la adjudicación al proponente **UT SERTAL CCE TECNOLOGIA** por ser la oferta más baja y estar acorde con las especificaciones técnicas solicitadas y encontrarse acorde económicamente, la cual cumple con los requisitos establecidos en el Acuerdo Marco de Precios CCENEG-018-1-2019 y las condiciones para comprar al amparo del Acuerdo Marco de compra o alquiler de Equipos Tecnológicos y Periféricos. Acuerdo CCE- 925-AMP-2019, Cláusula 6 Actividades de la Entidad Compradora en la Operación Secundaria, numeral 6.7. Diligenciar el formulario de estudios previos en la Tienda Virtual del Estado Colombiano y generar una solicitud de Orden de Compra sobre la Cotización del Proveedor que haya cotizado el menor precio total de la venta de ETP o Alquiler de ETP y demás relacionados en este numeral aplicables al proveedor seleccionado.

Dado en Bogotá, a los diecinueve (19) días del mes de octubre de 2020.



CARLOS ANDRES BARRETO GÚZMAN
Profesional Especializado - Subdirección Administrativa
Evaluador Aspectos Técnicos



JULIO CÉSAR BENAVIDES CARRANZA
Contratista - Subdirección Administrativa
Evaluador Aspectos Técnicos



CAMARA DE COMERCIO DE BOGOTA

SEDE VIRTUAL

CÓDIGO VERIFICACIÓN: B2014980630B19

14 DE SEPTIEMBRE DE 2020

HORA 10:23:26

AB20149806

PÁGINA: 1 DE 5

* * * * *

LA MATRÍCULA MERCANTIL PROPORCIONA SEGURIDAD Y CONFIANZA EN LOS
NEGOCIOS.

ESTE CERTIFICADO FUE GENERADO ELECTRÓNICAMENTE Y CUENTA CON UN CÓDIGO
DE VERIFICACIÓN QUE LE PERMITE SER VALIDADO ILIMITADAMENTE DURANTE
60 DÍAS, INGRESANDO A WWW.CCB.ORG.CO

RECUERDE QUE ESTE CERTIFICADO LO PUEDE ADQUIRIR DESDE SU CASA U
OFICINA DE FORMA FÁCIL, RÁPIDA Y SEGURA EN WWW.CCB.ORG.CO

PARA SU SEGURIDAD DEBE VERIFICAR LA VALIDEZ Y AUTENTICIDAD DE ESTE
CERTIFICADO SIN COSTO ALGUNO DE FORMA FÁCIL, RÁPIDA Y SEGURA EN
WWW.CCB.ORG.CO/CERTIFICADOSELECTRONICOS

CERTIFICADO DE EXISTENCIA Y REPRESENTACION LEGAL O INSCRIPCION DE
DOCUMENTOS.

LA CAMARA DE COMERCIO DE BOGOTA, CON FUNDAMENTO EN LAS MATRICULAS E
INSCRIPCIONES DEL REGISTRO MERCANTIL

CERTIFICA:

NOMBRE : TALENTO COMERCIALIZADORA S A

N.I.T. : 830.048.811-5

DOMICILIO : BOGOTÁ D.C.

CERTIFICA:

MATRICULA NO: 00889670 DEL 1 DE SEPTIEMBRE DE 1998

CERTIFICA:

RENOVACION DE LA MATRICULA :12 DE MARZO DE 2020

ULTIMO AÑO RENOVADO : 2020

ACTIVO TOTAL : 6,827,656,379

CERTIFICA:

DIRECCION DE NOTIFICACION JUDICIAL : CL 32 A NO. 19-22

MUNICIPIO : BOGOTÁ D.C.

EMAIL DE NOTIFICACION JUDICIAL : CONTADORA@TALENTOCO.COM

DIRECCION COMERCIAL : CL 32 A NO. 19-22

MUNICIPIO : BOGOTÁ D.C.

EMAIL COMERCIAL : CONTADORA@TALENTOCO.COM

CERTIFICA:

CONSTITUCION: QUE POR ESCRITURA PUBLICA NO. 0002130 DE NOTARIA 38 DE
BOGOTA D.C. DEL 24 DE AGOSTO DE 1998, INSCRITA EL 1 DE SEPTIEMBRE DE
1998 BAJO EL NUMERO 00647397 DEL LIBRO IX, SE CONSTITUYO LA SOCIEDAD
COMERCIAL DENOMINADA TALENTO COMERCIALIZADORA LIMITADA.

CERTIFICA:

QUE POR ESCRITURA PUBLICA NO. 2081 DE NOTARIA 76 DE BOGOTA D.C. DEL 7
DE JULIO DE 2009, INSCRITA EL 4 DE AGOSTO DE 2009 BAJO EL NÚMERO

01317502 DEL LIBRO IX, LA SOCIEDAD CAMBIO SU NOMBRE DE: TALENTO COMERCIALIZADORA LIMITADA POR EL DE: TALENTO COMERCIALIZADORA S A.

CERTIFICA:

QUE POR ESCRITURA PUBLICA NO. 2081 DE LA NOTARIA 76 DE BOGOTA D.C., DEL 07 DE JULIO DE 2009, INSCRITA EL 04 DE AGOSTO DE 2009 BAJO EL NÚMERO 01317502 DEL LIBRO IX, LA SOCIEDAD DE LA REFERENCIA SE TRANSFORMO DE SOCIEDAD LIMITADA A ANÓNIMA BAJO EL NOMBRE DE: TALENTO COMERCIALIZADORA S.A.

CERTIFICA:

REFORMAS:

DOCUMENTO	NO.	FECHA	ORIGEN	FECHA	NO. INSC.
0001785	2002/10/17	NOTARIA 38	2002/10/24	00850024	
0001877	2005/06/21	NOTARIA 38	2005/07/22	01002296	
0001937	2006/05/22	NOTARIA 38	2006/05/30	01058330	
0002133	2007/03/17	NOTARIA 38	2007/03/22	01118262	
0010878	2008/10/10	NOTARIA 38	2008/10/17	01249973	
2935	2009/03/13	NOTARIA 38	2009/03/18	01283313	
2081	2009/07/07	NOTARIA 76	2009/07/14	01312480	
2081	2009/07/07	NOTARIA 76	2009/07/14	01312482	
2081	2009/07/07	NOTARIA 76	2009/07/14	01312484	
2081	2009/07/07	NOTARIA 76	2009/07/15	01312829	
2081	2009/07/07	NOTARIA 76	2009/08/04	01317502	
2887	2009/09/11	NOTARIA 76	2009/09/15	01326868	
4933	2010/12/18	NOTARIA 19	2010/12/22	01438746	
3881	2011/11/28	NOTARIA 19	2011/12/06	01533007	
1378	2014/05/27	NOTARIA 19	2014/06/12	01843633	
1726	2016/07/22	NOTARIA 19	2016/08/01	02127871	

CERTIFICA:

VIGENCIA: QUE LA SOCIEDAD NO SE HALLA DISUELTA. DURACION HASTA EL 7 DE JULIO DE 2029

CERTIFICA:

OBJETO SOCIAL: COMPRAVENTA, COMERCIALIZACIÓN, EDICIÓN, ELABORACIÓN, PROMOCIÓN, DISTRIBUCIÓN, EXPORTACIÓN, IMPORTACIÓN DE MATERIAL DIDÁCTICO PEDAGÓGICO COMO TEXTOS, DISKET FOLLETOS, LAMINAS CD ROM, VIDEO Y TODOS LOS ELEMENTOS USADOS EN LA ENSEÑANZA A TODO NIVEL Y AUTORIZADOS POR EL ESTADO, IGUALES ACTOS PODRÁ EJECUTAR CON MATERIAL DE CARÁCTER CIENTÍFICO O CULTURAL A NIVEL ESPECIALIZADO Y EN GENERAL, COMO EQUIPOS Y ELEMENTOS DE FÍSICA, QUÍMICA, BIOLOGÍA, AUDIOVISUALES, REACTIVOS, MICROSCOPIOS, PROYECTORES, INSTRUMENTOS MUSICALES, PAPELERÍA Y ÚTILES DE ESCRITORIO, COMPUTADORAS, IMPRESORAS, JUGUETERÍA, MUEBLES DE OFICINAS Y DEMÁS ELEMENTOS ORIENTADOS A LA EDUCACIÓN ESCOLAR. COMPRAVENTA, MANTENIMIENTO, DOTACIÓN Y COMERCIALIZACIÓN DE ELEMENTOS DE ASEO, CAFETERÍA, PRODUCTOS PROPIOS DE LA CONSTRUCCIÓN, ELEMENTOS DE FERRETERÍA EN GENERAL, ELEMENTOS DEPORTIVOS, EQUIPOS MÉDICOS Y TODO LO REFERENTE A LA SALUD, DOTACIÓN Y VESTUARIO, ELECTRODOMÉSTICOS, DOTACIÓN PARA RESTAURANTES ESCOLARES Y EN GENERAL EQUIPOS ELECTROS Y ELECTRÓNICOS, DESARROLLO DE SOFTWARE, SERVICIO SOPORTE TÉCNICO EN GENERAL EN EL ÁREA DE SISTEMAS, COMPRAVENTA DE REPUESTOS DE AUTOMOTORES Y DOTACIÓN DE ESTOS TALES COMO LLANTAS Y ACCESORIOS. IGUALMENTE PODRÁ PRESTAR SERVICIOS DE IMPRESIÓN, SERVICIO DE PUBLICIDAD, COMO TAMBIÉN LA DOTACIÓN E INSTALACIÓN DE CIRCUITO CERRADO DE TELEVISIÓN, CON SUS CORRESPONDIENTES ACCESORIOS Y TODO LO RELACIONADO CON LA GAMA DE LA SEGURIDAD RESIDENCIAL, INDUSTRIAL E INSTITUCIONAL. E IGUAL TODO LO RELACIONADO CON ABARROTES EN GENERAL Y SERVICIO DE ARCHIVÍSTICA. -COMPRAVENTAS DE PRODUCTOS TEXTILES, PRENDAS DE VESTIR, CALZADO, PRODUCTOS CONFECCIONADOS PARA



CAMARA DE COMERCIO DE BOGOTA

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USO DOMESTICO, ARTÍCULOS Y EQUIPOS DE USO DOMESMÉTICO, COCINAS INTEGRALES, DIVISIONES MODULARES, EQUIPOS MÉDICOS Y QUIRÚRGICOS Y DE APARATOS ORTESICOS Y PROTÉSICOS. COMPRAVENTA DE MATERIALES DE CONSTRUCCIÓN, ARTÍCULOS DE FERRETERÍA, CERRAJERÍA Y PINTURAS. COMPRAVENTA DE MATERIAS PRIMAS, PRODUCTOS AGRÍCOLAS Y PECUARIOS. PRESTACIÓN DE SERVICIOS RELACIONADOS CON LAS TELECOMUNICACIONES. COMPRAVENTA DE PARTES, PIEZAS Y ACCESORIOS PARA VEHÍCULOS AUTOMOTORES, REALICE ACTIVIDADES PROPIAS DE COMPRAVENTA DE VEHÍCULOS Y AUTOMOTORES, MOTOCICLETAS, PARTES, PIEZAS Y ACCESORIOS PARA LOS MISMOS, COMPRAVENTA DE INSUMOS PARA IMPRESIÓN Y TODA CLASE DE ELEMENTOS PUBLICITARIOS. LA PRESTACIÓN DE SERVICIOS DE CONSULTORÍA, INTERVENTORÍA, EJECUCIÓN DE PROYECTOS DE ARQUITECTURA E INGENIERÍA, ELABORACIÓN DE PROYECTOS DE ARQUITECTURA E INGENIERÍA, ELABORACIÓN DE PROYECTOS RELACIONADOS CON LA PLANIFICACIÓN URBANA, SUMINISTRO Y VENTA DE MATERIALES E INSUMOS, EQUIPO, MAQUINARIA, SOFTWARE, HADWARE PARA LA CONSTRUCCIÓN. REALIZAR ESTUDIOS CATASTRALES, AVALÚOS, COMPRAS, VENTAS Y ADMINISTRACIÓN DE BIENES RAÍCES. CONSTRUIR PRESAS, DIQUES, MUELLES, SISTEMA DE IRRIGACIÓN Y DRENAJE, DRAGADOS Y CANALES, AGUAS SUBTERRÁNEAS Y POZOS PROFUNDOS, GENERACIÓN Y MODIFICACIÓN DE PLAYAS. CONSTRUIR: ACUEDUCTOS, EN GENERAL, OBRAS DE CAPTACIÓN, REDES DE CONDUCCIÓN Y DISTRIBUCIÓN DE AGUAS POTABLES; ESTACIONES DE BOMBEO; INSTALACIÓN Y MANTENIMIENTO DE MICRO MEDICIÓN; PLANTAS DE TRATAMIENTO PARA AGUA POTABLE; TÚNELES DE ALMACENAMIENTO, REDES DE CONDUCCIÓN DE AGUAS SERVIDAS Y RESIDUALES, ESTACIONES DE BOMBEO, PLANTAS DE TRATAMIENTO DE AGUAS RESIDUALES, LAGUNAS DE ESTABILIZACIÓN, TANQUES DE ALMACENAMIENTO, CONSTRUCCIÓN Y REPARACIÓN DE TODA CLASE DE ELEMENTOS RELACIONADOS CON EL TRANSPORTE DE MATERIALES POR MEDIO DE DUCTOS, TALES COMO ACUEDUCTOS, ALCANTARILLADOS, OLEODUCTOS, SISTEMAS, GASODUCTOS, SISTEMAS POLIDUCTOS, REALIZAR CONTROL DE EROSIÓN RECUPERACIÓN ECOLÓGICA Y MORFOLÓGICA, EMPRADIZACIÓN, REVEGETACIÓN O COBERTURA VEGETAL, RELLENOS SANITARIOS, PLANTAS DE TRATAMIENTO DE BASURAS, POZOS SÉPTICOS, EXPLOTACIÓN DE RECURSOS NATURALES. CONSTRUIR: CENTRALES TELEFÓNICAS, INSTALAR Y SUMINISTRAR REDES DE FIBRA ÓPTICA O SATELITALES. EJECUTAR: EDIFICACIONES Y OBRAS DE URBANISMOS, REMODELACIONES, EFECTUAR CONSERVACIÓN Y MANTENIMIENTO DE OBRAS, RESTAURACIÓN Y CONSERVACIÓN DE MUEBLES (SIC) E INMUEBLES CONSIDERADOS COMO PATRIMONIO ARQUITECTÓNICO, CONSTRUIR O MANTENER PARQUES, DISEÑO CONSTRUCCION Y COMERCIALIZACION DE PARQUES, EJECUTAR ESTRUCTURAS DE CONCRETO, ESTRUCTURAS METÁLICAS, ESTRUCTURAS DE MADERA, CUALQUIER TIPO DE ESTRUCTURAS, INSTALACIONES Y DOTACIONES INTERIORES PARA EDIFICIOS Y CONSTRUCCIONES EN GENERAL. CONSTRUCCIÓN Y MONTAJE DE HIDROELÉCTRICAS, TERMOELÉCTRICAS, SUBESTACIONES DE ENERGÍA, SISTEMAS DE CALEFACCIÓN, REFRIGERACIÓN Y ENFRIAMIENTO, MONTAJE DE ASCENSORES, MONTACARGAS, PUENTES GRÚAS, CONSTRUCCIÓN DE LÍNEAS DE TRANSMISIÓN Y SUB TRANSMISIÓN DE ENERGÍA, REDES DE DISTRIBUCIÓN ELÉCTRICAS, REDES SUBTERRÁNEAS, CONSTRUCCIÓN DE

REDES DE ALUMBRADO PÚBLICO, MONTAJES DE TUBERÍAS DE PRESIÓN. CONSTRUCCIÓN Y MONTAJE DE UNIDADES DE PROCESO, FRIGORÍFICOS, SIDERÚRGICAS, ZONAS FRANCAS, INDUSTRIAS DE ALIMENTOS, INDUSTRIAS DE PAPELES, MATADEROS, ASTILLEROS, BODEGAS, INSTALACIONES DEPORTIVAS Y DE RECREACIÓN, ESTADIOS, COLISEOS, ESPACIOS PÚBLICO, ANDENES, SARDINELES, HOSPITALARIAS Y DE LA SALUD, EDUCATIVAS, HABITACIONALES, PLAZAS, LÍNEAS FÉRREAS. EXPLORAR O EXPLOTAR LA MINERÍA, CONSTRUIR DUCTOS PARA TRANSPORTE DE HIDROCARBUROS, ESTRUCTURAS MARÍTIMAS, PLATAFORMAS Y MONO BOYAS, REFINERÍAS Y PLANTAS PETROQUÍMICAS, TANQUES METÁLICOS, ESTACIONES DE RECOLECCIÓN Y/O BOMBEO. ADMINISTRACIÓN DE VÍAS, CONCESIÓN DE VÍAS, VÍAS DE COMUNICACIÓN EN SUPERFICIE, CONSTRUCCIÓN DOTACIÓN Y MANTENIMIENTO DE CARRETERAS, CONSTRUCCIÓN Y MANTENIMIENTO DE VÍAS URBANAS Y RULARES, TERMINALES DE TRANSPORTE, CONSTRUCCIÓN DE PARQUEADEROS, PAVIMENTOS RÍGIDOS, PAVIMENTOS FLEXIBLES, PUENTES, CABLES AÉREOS, PERFORACIONES, TÚNELES Y EXCAVACIONES SUBTERRÁNEAS, PUERTOS MARÍTIMOS Y FLUVIALES, SEÑALIZACIÓN Y SEMAFORIZACIÓN. INSTALACIÓN DE: SISTEMAS DE SEGURIDAD INDUSTRIAL, SISTEMAS CONTRA INCENDIO, CERCAS ELÉCTRICAS DE SEGURIDAD, INSTALACIONES DE GAS. ADECUACIÓN DE PREDIOS MOVIMIENTO DE TIERRAS, EXPLANACIONES. IGUALMENTE PODRÁ FABRICAR Y SUMINISTRAR AL CONTRATANTE O A OTRAS PERSONAS CUALQUIERA DE LOS MATERIALES, MERCANCÍAS, EQUIPOS, MAQUINARIA, MOTORES O ELEMENTOS O MONTAJE DE LOS TRABAJOS ENUMERADOS PRECEDENTEMENTE, COMPRAR, VENDER, IMPORTAR O EXPORTAR ESAS MISMAS MERCANCÍAS, EQUIPOS, MAQUINAS, MOTORES, ELEMENTOS Y MATERIALES. REPRESENTAR DENTRO DEL TERRITORIO NACIONAL A EMPRESAS EXTRANJERAS PARA LA IMPORTACIÓN DEL EXTERIOR DE MAQUINARIA, TECNOLOGÍA, SOFTWARE O DE PRODUCTOS ENUMERADOS PRECEDENTEMENTE PARA TRABAJO RELACIONADO CON EL OBJETO SOCIAL DE LA EMPRESA O PARA LA TRANSFORMACIÓN, COMERCIALIZACIÓN Y DISTRIBUCIÓN EN EL PAÍS. FINANCIAR CON MATERIALES PROPIOS O AJENOS LA EJECUCIÓN DE LOS TRABAJOS ANTERIORMENTE ENUMERADOS EN LA FABRICACIÓN, COMPRA, VENTA, IMPORTACIÓN DE LAS MERCADERÍAS, EQUIPOS, MAQUINAS, MOTORES, ELEMENTOS Y MATERIALES NECESARIOS A LOS MISMOS PARA LA CABAL REALIZACIÓN DE SU OBJETO. PRODUCCIÓN DE MEZCLAS ASFÁLTICAS O DE OTRA CLASE, O DE MATERIALES PARA LA CONSTRUCCIÓN PARA EMPLEARLOS EN SUS OBRAS O PARA VENDERLOS A TERCEROS. FINANCIAR Y EJECUTAR PROYECTOS DE URBANIZACIONES Y PARCELACIONES INCLUYENDO VIVIENDA DE INTERÉS SOCIAL. EXPLORACIÓN Y EXPLOTACIÓN DE TODA CLASE DE MINAS RECURSOS NATURALES NO RENOVABLES Y RENOVABLES REFERIDAS CON EL APROVECHAMIENTO INTEGRAL DE TALES RECURSOS EN CUALQUIERA DE LAS FASES COMO TRANSPORTE, REFINACIÓN, MANUFACTURA, TRANSFORMACIÓN, BENEFICIO Y COMERCIALIZACIÓN DE LOS MENCIONADOS RECURSOS ETC., PUDIÉNDOLAS DESARROLLAR EN SUS RAMAS TÉCNICAS, ECONÓMICAS, JURÍDICAS, INDUSTRIALES Y COMERCIALES. REALIZAR TODAS LAS DEMÁS ACTIVIDADES COMPLEMENTARIAS, ADICIONALES O RELACIONADAS CON DICHO OBJETO. LA COMPAÑÍA PODRÁ DEDICARSE A LA ACTIVIDAD COMERCIAL DE LA FINCA RAÍZ EN LO RELACIONADO CON: ELABORACIÓN DE REGLAMENTOS DE PROPIEDAD HORIZONTAL, CON FACULTAD EXPRESA PARA DEDICARSE TAMBIÉN A LA CONSTRUCCIÓN DE EDIFICIOS PARA SU VENTA POR EL SISTEMA O RÉGIMEN DE PROPIEDAD HORIZONTAL CON FORME A LAS NORMAS Y LA LEY, YA SEA POR CUENTA PROPIA O POR CUENTA DE TERCEROS O EN PARTICIPACIÓN CON ELLOS. LA COMPAÑÍA TAMBIÉN PODRÁ PARTICIPAR EN LICITACIONES PÚBLICAS Y PRIVADAS CONTRATAR Y SUBCONTRATAR PARA EL BUEN DESEMPEÑO DE LAS FUNCIONES EN DESARROLLO DE SU OBJETO SOCIAL SEA EN NOMBRE PROPIO O POR CUENTA DE TERCEROS O EN PARTICIPACIÓN CON ELLOS LA SOCIEDAD PODRÁ EJECUTAR TODO LOS ACTOS TÉCNICOS, COMERCIALES, FINANCIEROS O ADMINISTRATIVOS, IGUALMENTE PODRÁ GRAVAR, ADMINISTRAR, EXPLOTAR, INTERVENIR COMO ACREEDORA O COMO DEUDORA EN TODA CLASE DE OPERACIONES



CAMARA DE COMERCIO DE BOGOTA

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DE CRÉDITO, RECIBIENDO O DANDO LAS GARANTÍAS DEL CASO, CUANDO HAYA LUGAR A ELLAS; CELEBRAR ASÍ MISMO CON COMPAÑÍAS ASEGURADORAS CUALESQUIERA OPERACIONES RELACIONADAS CON LA PROTECCIÓN DE SUS BIENES, NEGOCIOS O PERSONAL A SU SERVICIO, IGUALMENTE PODRÁ ADQUIRIR, ENAJENAR, COMPRAR, VENDER, GRAVAR, ADMINISTRAR, GIRAR, PROTESTAR, PAGAR O CANCELAR, ACEPTAR, ENDOSAR, ASEGURAR, COBRAR, DESCONTAR, NEGOCIAR TODA CLASE DE TÍTULOS VALORES Y CUALQUIER OTRA CLASE DE CRÉDITOS, EXPLOTAR, EXPLORAR, DAR A TOMAR EN ARRENDAMIENTO O A CUALQUIER TITULO ONEROSO O GRATUITO TODA CLASE DE BIENES MUEBLES O INMUEBLES CORPORALES O INCORPORALES, DARLOS EN PRENDA O HIPOTECA; CELEBRAR CON ESTABLECIMIENTOS DE CRÉDITO TODA CLASE DE OPERACIONES COMO DEPÓSITOS, GIROS, ETC. ; PROTESTAR, PAGAR O CANCELAR INSTRUMENTOS NEGOCIABLES O CUALQUIERA EFECTOS DE COMERCIO Y ACEPTARLOS EN PAGO; OBTENER DERECHOS DE PROPIEDAD SOBRE MARCAS, PATENTES, DIBUJOS, INSIGNIAS, LA CONSECUCCIÓN DE REGISTROS DE MARCA, PATENTES Y PRIVILEGIOS Y SU CESIÓN A CUALQUIER TITULO, DE INTERESES, PARTICIPACIONES O ACCIONES DIRECTAS O INDIRECTAMENTE CON SU OBJETO. LA REPRESENTACIÓN O AGENCIA DE PERSONAS NATURALES O JURÍDICAS DEDICADAS A LAS MISMAS ACTIVIDADES O A AQUELLAS ACTIVIDADES QUE DIRECTA O INDIRECTAMENTE SE RELACIONEN CON SU OBJETO, HACER EN CUALQUIER PARTE, SEA EN SU NOMBRE PROPIO O POR CUENTA DE TERCEROS O EN PARTICIPACIÓN CON ELLOS, TODA CLASE DE OPERACIONES Y EJECUTAR O CELEBRAR TODA CLASE DE ACTOS O CONTRATOS, BIEN SEA CIVILES, INDUSTRIALES, COMERCIALES O FINANCIEROS QUE SEA CONVENIENTES O NECESARIOS PARA EL LOGRO DE LOS FINES QUE LA SOCIEDAD PERSIGUE TAL COMO QUEDA DETERMINADO, INCLUSO ACTIVIDADES DE IMPORTACIÓN Y/O EXPORTACIÓN, LA CONSTRUCCIÓN DE EDIFICACIONES PARA INSTALAR LAS DEPENDENCIA DE LA EMPRESA Y LA ADQUISICIÓN, ENAJENACIÓN Y GRAVAMEN EN CUALQUIER FORMA, DE MATERIALES, MATERIAS PRIMAS, EQUIPOS Y TODOS AQUELLOS ELEMENTOS QUE FUEREN NECESARIOS AL DESARROLLO DEL OBJETO SOCIAL. PARA EL DESARROLLO DE DICHO OBJETO Y CUANDO SE RELACIONEN DIRECTAMENTE CON EL MISMO LA SOCIEDAD PODRÁ: FORMAR PARTE DE OTRAS SOCIEDADES O ACCESORIAS A ELLAS, O ABSORBER TAL CLASE DE EMPRESAS, TRANSIGIR, DESISTIR Y APELAR A DECISIONES DE ÁRBITROS O DE AMIGABLES COMPONEDORES EN LOS ASUNTOS EN QUE TENGA INTERÉS FRENTE A TERCEROS, A LOS SOCIOS, A LOS ADMINISTRADORES DEMÁS FUNCIONARIOS Y TRABAJADORES DE LA SOCIEDAD, CELEBRAR O EJECUTAR, EN GENERAL, TODOS LOS ACTOS PREPARATORIOS COMPLEMENTARIOS O ACCESORIOS DE LOS ANTERIORES Y LOS DEMÁS QUE SEAN NECESARIOS O ÚTILES PARA EL BUEN DESARROLLO DEL OBJETO SOCIAL. PARA LLEVAR A CABO EL OBJETO SOCIAL DE LA SOCIEDAD PODRÁ DESARROLLAR LAS SIGUIENTES ACTIVIDADES: A- ADQUIRIR, ENAJENAR, IMPORTAR O EXPORTAR, GRAVAR, ADMINISTRAR, HIPOTECAR, PERMUTAR POR CUENTA PROPIA O AJENA TODO TIPO DE BIENES MUEBLES E INMUEBLES. B- ADQUIRIR AL CUALQUIER TITULO, CONCESIONES, PATENTES, PRIVILEGIOS, MARCAS DE FÁBRICA ONINDUSTRIA Y COMERCIO, ENAJENARLOS. C- TOMAR O DAR EN ARRENDAMIENTO

TODA CLASE DE BIENES MUEBLES O INMUEBLES. D- DEMOLER CONSTRUCCIONES O LEVANTARLAS, POR CUENTA PROPIA O POR CUENTA DE TERCEROS CON DESTINO DE LA SOCIEDAD. E- ACTUAR COMO AGENTE COMERCIAL O REPRESENTANTE DE EMPRESAS NACIONALES O EXTRANJERAS QUE DESARROLLEN OBJETOS SOCIALES IGUALES O SIMILARES, DISTRIBUIR, COMERCIALIZAR SUS PRODUCTOS SIEMPRE Y CUANDO SE RELACIONEN CON EL OBJETO SOCIAL DE LA SOCIEDAD. F- INTERVENIR ANTE TERCEROS O ANTE LOS SOCIOS MISMOS COMO ACREEDORA COMO GARANTE DE TODA CLASE DE OPERACIONES DE CRÉDITO DANDO O RECIBIENDO LAS GARANTÍAS DEL CASO CUANDO HAYA LUGAR A ELLO. G- NOMBRAR, VENDER, SUSCRIBIR, PERMUTAR ACCIONES DE CAPITAL O GRABARLOS, FORMAR PARTE DE OTRAS SOCIEDADES, INCORPORARSE O FUSIONARSE CON ELLOS SI TIENE RELACIÓN DIRECTA CON EL OBJETO PRINCIPAL, PARA EL QUE LA SOCIEDAD SE HA CONSTITUIDO. H- TOMAR O DAR DINERO EN MUTUO CON O SIN INTERESES, CON O SIN GARANTÍAS REALES O PERSONALES. I- LLEVAR A CABO TODA CLASE DE OPERACIONES DE CRÉDITO TALES COMO GIRAR, ACEPTAR, ENDOSAR, ASEGURAR, COBRAR Y NEGOCIAR TODA CLASE DE INSTRUMENTOS COMERCIALES O TÍTULOS VALORES O DE CRÉDITO Y DEMÁS ACCIONES JURÍDICAS RELACIONADOS CON ESTOS, SEAN DE CARÁCTER CIVIL O COMERCIAL. J- TRANSFORMARSE EN OTRO TIPO DE SOCIEDAD CON OBJETOS SOCIALES IGUALES O SIMILARES. K- TRANSIGIR, DESISTIR, O APELAR A DECISIONES ARBITRALES O JUDICIALES EN LAS CUESTIONES QUE TENGA INTERESES FRENTE A TERCEROS A LOS ASOCIADOS MISMOS A SUS ADMINISTRADORES Y TRABAJADORES. L- ABRIR CUENTAS CORRIENTES DE AHORRO, Y EFECTUAR LOS DEPÓSITOS EN BANCOS O CORPORACIONES Y DEMÁS ESTABLECIMIENTOS FINANCIEROS SIMILARES EXISTENTES EN EL PAÍS. M-CELEBRAR Y EJECUTAR TODOS LOS ACTOS Y CONTRATOS PREPARATORIOS, COMPLEMENTARIOS O ACCESORIOS DE TODOS LOS ANTERIORES Y EN GENERAL, LOS QUE SE RELACIONEN CON LA EXISTENCIA Y FUNCIONAMIENTO DE LA SOCIEDAD. N- EN GENERAL CELEBRAR TODA CLASE DE ACTOS, OPERACIONES CONTRATOS O ACTIVIDADES, LICITAS QUE TENGAN RELACIÓN DIRECTA O INDIRECTA CON EL OBJETO DE LA SOCIEDAD TANTO EN ENTIDADES PRIVADAS COMO OFICIALES.

CERTIFICA:

ACTIVIDAD PRINCIPAL:

4649 (COMERCIO AL POR MAYOR DE OTROS UTENSILIOS DOMÉSTICOS N.C.P.)

ACTIVIDAD SECUNDARIA:

4651 (COMERCIO AL POR MAYOR DE COMPUTADORES, EQUIPO PERIFÉRICO Y PROGRAMAS DE INFORMÁTICA)

OTRAS ACTIVIDADES:

4761 (COMERCIO AL POR MENOR DE LIBROS, PERIÓDICOS, MATERIALES Y ARTÍCULOS DE PAPELERÍA Y ESCRITORIO, EN ESTABLECIMIENTOS ESPECIALIZADOS)

4690 (COMERCIO AL POR MAYOR NO ESPECIALIZADO)

CERTIFICA:

CAPITAL:

** CAPITAL AUTORIZADO **

VALOR	: \$874,783,933.00
NO. DE ACCIONES	: 42,830.00
VALOR NOMINAL	: \$20,424.56

** CAPITAL SUSCRITO **

VALOR	: \$874,783,933.00
NO. DE ACCIONES	: 42,830.00
VALOR NOMINAL	: \$20,424.56

** CAPITAL PAGADO **

VALOR	: \$874,783,933.00



CAMARA DE COMERCIO DE BOGOTA

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NO. DE ACCIONES : 42,830.00
VALOR NOMINAL : \$20,424.56

CERTIFICA:

** JUNTA DIRECTIVA: PRINCIPAL (ES) **

QUE POR ACTA NO. 14 DE ASAMBLEA DE ACCIONISTAS DEL 11 DE JULIO DE 2016, INSCRITA EL 1 DE AGOSTO DE 2016 BAJO EL NUMERO 02127886 DEL LIBRO IX, FUE (RON) NOMBRADO (S):

NOMBRE	IDENTIFICACION
PRIMER RENGLON	
TORRES CAMPOS MIGUEL ANGEL	C.C. 000000003224419
SEGUNDO RENGLON	
RODRIGUEZ VARGAS GERMAN LEONARDO	C.C. 000000003032904
TERCER RENGLON	
CORTES CENDALES MANUEL JEREMIAS	C.C. 000000003224332

** JUNTA DIRECTIVA: SUPLENTE (S) **

QUE POR ACTA NO. 14 DE ASAMBLEA DE ACCIONISTAS DEL 11 DE JULIO DE 2016, INSCRITA EL 1 DE AGOSTO DE 2016 BAJO EL NUMERO 02127886 DEL LIBRO IX, FUE (RON) NOMBRADO (S):

NOMBRE	IDENTIFICACION
PRIMER RENGLON	
TORRES OLAYA HAYDEE	C.C. 000000052445891
SEGUNDO RENGLON	
RODRIGUEZ RODRIGUEZ GERMAN DAVID	C.C. 000001022341438
TERCER RENGLON	
CORTES RINCON YOHAN MANUEL	C.C. 000000079980163

CERTIFICA:

REPRESENTACIÓN LEGAL: LA SOCIEDAD TENDRÁ UN GERENTE, QUE PODRÁ SER O NO MIEMBRO DE LA JUNTA DIRECTIVA, CON UN SUPLENTE QUE REEMPLAZARÁ AL PRINCIPAL, EN SUS FALTAS ACCIDENTALES, TEMPORALES O ABSOLUTAS.

CERTIFICA:

** NOMBRAMIENTOS **

QUE POR ACTA NO. 006 DE JUNTA DIRECTIVA DEL 8 DE MARZO DE 2012, INSCRITA EL 16 DE MARZO DE 2012 BAJO EL NUMERO 01617332 DEL LIBRO IX, FUE (RON) NOMBRADO (S):

NOMBRE	IDENTIFICACION
GERENTE	
RODRIGUEZ VARGAS GERMAN LEONARDO	C.C. 000000003032904

QUE POR ACTA NO. 16 DE ASAMBLEA DE ACCIONISTAS DEL 10 DE JULIO DE 2017, INSCRITA EL 1 DE AGOSTO DE 2017 BAJO EL NUMERO 02247306 DEL LIBRO IX, FUE (RON) NOMBRADO (S):

NOMBRE	IDENTIFICACION
SUPLENTE DEL GERENTE	
TORRES CAMPOS MIGUEL ANGEL	C.C. 000000003224419

CERTIFICA:

FACULTADES DEL REPRESENTANTE LEGAL: EL GERENTE EJERCERÁ TODAS LAS

FUNCIONES PROPIAS DE LA NATURALEZA DE SU CARGO, Y EN ESPECIAL, LAS SIGUIENTES: 1. SER EL REPRESENTANTE LEGAL DE LA SOCIEDAD PARA TODOS LOS EFECTOS ANTE ENTES PÚBLICOS Y PRIVADOS, TANTO NACIONALES COMO INTERNACIONALES, PUDIENDO A LA VEZ DESIGNAR APODERADOS GENERALES Y ESPECIALES; IGUALMENTE USAR LA FIRMA O RAZÓN SOCIAL. 2. EJECUTAR TODOS LOS ACTOS U OPERACIONES CORRESPONDIENTES AL OBJETO SOCIAL, DE CONFORMIDAD CON LO PREVISTO EN LAS LEYES Y EN ESTOS ESTATUTOS Y ESPECIALMENTE SER EL REPRESENTANTE LEGAL. 3. AUTORIZAR CON SU FIRMA TODOS LOS DOCUMENTOS PÚBLICOS O PRIVADOS QUE DEBAN OTORGARSE EN DESARROLLO DE LAS ACTIVIDADES SOCIALES O EN INTERÉS DE LA SOCIEDAD. 4. PRESENTAR A LA ASAMBLEA GENERAL EN SUS REUNIONES ORDINARIAS, UN INVENTARIO Y UN BALANCE DE FIN DE EJERCICIO, JUNTO CON UN INFORME ESCRITO SOBRE LA SITUACIÓN DE LA SOCIEDAD, UN DETALLE COMPLETO DE LA CUENTA DE PÉRDIDAS Y GANANCIAS Y UN PROYECTO DE DISTRIBUCIÓN DE UTILIDADES OBTENIDAS. 5. NOMBRAR Y REMOVER LOS EMPLEADOS DE LA SOCIEDAD CUYO NOMBRAMIENTO Y REMOCIÓN LE DELEGUE LA JUNTA DIRECTIVA. 6. TOMAR TODAS LAS MEDIDAS QUE RECLAME LA CONSERVACIÓN DE LOS BIENES SOCIALES, VIGILAR LA ACTIVIDAD DE LOS EMPLEADOS DE LA ADMINISTRACIÓN DE LA SOCIEDAD E IMPARTIRLES LAS ÓRDENES E INSTRUCCIONES QUE EXIJA LA BUENA MARCHA DE LA COMPAÑÍA. 7. CONVOCAR LA ASAMBLEA GENERAL A REUNIONES EXTRAORDINARIAS CUANDO LO JUZGUE CONVENIENTE O NECESARIO Y HACER LAS CONVOCATORIAS DEL CASO CUANDO LO ORDENEN LOS ESTATUTOS, LA JUNTA DIRECTIVA O EL REVISOR FISCAL DE LA SOCIEDAD. 8. CONVOCAR LA JUNTA, DIRECTIVA CUANDO LO CONSIDERE NECESARIO O CONVENIENTE Y MANTENERLA INFORMADA DEL CURSO DE LOS NEGOCIOS SOCIALES. 9. CUMPLIR LAS ÓRDENES E INSTRUCCIONES QUE LE IMPARTA LA ASAMBLEA GENERAL O LA JUNTA DIRECTIVA, Y EN PARTICULAR, SOLICITAR AUTORIZACIONES PARA LOS NEGOCIOS QUE DEBEN APROBAR PREVIAMENTE LA ASAMBLEA O LA JUNTA DIRECTIVA SEGÚN LO DISPONEN LAS NORMAS CORRESPONDIENTES DEL PRESENTE ESTATUTO. 10. CELEBRAR TODOS LOS ACTOS Y CONTRATOS COMPRENDIDOS DENTRO DEL OBJETO SOCIAL Y RELACIONADOS CON EL MISMO, SIN LÍMITE CUANTÍA, A EXCEPCIÓN DE COMPRAR, VENDER O GRAVAR BIENES INMUEBLES CUYOS VALORES EXCEDAN DE 1.000 SALARIOS MÍNIMOS LEGALES MENSUALES. 11. CONSTITUIR APODERADOS EXTRAJUDICIALES Y JUDICIALES NECESARIOS PARA LA REPRESENTACIÓN Y DEFENSA DE LOS INTERESES DE LA SOCIEDAD. 12. CUMPLIR O HACER QUE SE CUMPLAN OPORTUNAMENTE TODOS LOS REQUISITOS O EXIGENCIAS LEGALES QUE SE RELACIONEN CON EL FUNCIONAMIENTO Y ACTIVIDADES DE LA SOCIEDAD.

CERTIFICA:

** REVISOR FISCAL **

QUE POR ACTA NO. 08 DE ASAMBLEA DE ACCIONISTAS DEL 27 DE MARZO DE 2013, INSCRITA EL 19 DE DICIEMBRE DE 2013 BAJO EL NUMERO 01791471 DEL LIBRO IX, FUE (RON) NOMBRADO (S):

NOMBRE	IDENTIFICACION
REVISOR FISCAL PERSONA JURIDICA	
NOVA CONSULTORES Y ASESORIAS S A S	N.I.T. 000009005360962
QUE POR ACTA NO. 001 DE ASAMBLEA DE ACCIONISTAS DEL 31 DE MARZO DE 2013, INSCRITA EL 19 DE DICIEMBRE DE 2013 BAJO EL NUMERO 01791477 DEL LIBRO IX, FUE (RON) NOMBRADO (S):	

NOMBRE	IDENTIFICACION
REVISOR FISCAL PRINCIPAL	
GUEVARA HINCAPIE CARLOS WALTER	C.C. 000000019293178
REVISOR FISCAL SUPLENTE	
NAVARRETE PULIDO ENRIQUE JOSE	C.C. 000000017171418

CERTIFICA:

QUE LA SOCIEDAD TIENE MATRICULADOS LOS SIGUIENTES ESTABLECIMIENTOS:



CAMARA DE COMERCIO DE BOGOTA

SEDE VIRTUAL

CÓDIGO VERIFICACIÓN: B2014980630B19

14 DE SEPTIEMBRE DE 2020 HORA 10:23:26

AB20149806

PÁGINA: 5 DE 5

* * * * *

NOMBRE : TALENTO COMERCIALIZADORA S A
MATRICULA NO : 02923924 DE 23 DE FEBRERO DE 2018
RENOVACION DE LA MATRICULA : EL 12 DE MARZO DE 2020
ULTIMO AÑO RENOVADO : 2020
DIRECCION : CL 2 NO. 8 - 51
TELEFONO : 3132848220
DOMICILIO : ZIPAQUIRÁ (CUNDINAMARCA)
EMAIL : TALENTOCIA@HOTMAIL.COM

CERTIFICA:

DE CONFORMIDAD CON LO ESTABLECIDO EN EL CÓDIGO DE PROCEDIMIENTO ADMINISTRATIVO Y DE LO CONTENCIOSO ADMINISTRATIVO Y DE LA LEY 962 DE 2005, LOS ACTOS ADMINISTRATIVOS DE REGISTRO AQUÍ CERTIFICADOS QUEDAN EN FIRME DIEZ (10) DÍAS HÁBILES DESPUÉS DE LA FECHA DE LA CORRESPONDIENTE ANOTACIÓN, SIEMPRE QUE NO SEAN OBJETO DE RECURSO. LOS SÁBADOS NO SON TENIDOS EN CUENTA COMO DÍAS HÁBILES PARA LA CÁMARA DE COMERCIO DE BOGOTÁ.

* * * EL PRESENTE CERTIFICADO NO CONSTITUYE PERMISO DE * * *
* * * FUNCIONAMIENTO EN NINGUN CASO * * *

INFORMACION COMPLEMENTARIA

LOS SIGUIENTES DATOS SOBRE PLANEACION DISTRITAL SON INFORMATIVOS
FECHA DE ENVIO DE INFORMACION A PLANEACION DISTRITAL : 16 DE JUNIO DE 2020

SEÑOR EMPRESARIO, SI SU EMPRESA TIENE ACTIVOS INFERIORES A 30.000 SMLMV Y UNA PLANTA DE PERSONAL DE MENOS DE 200 TRABAJADORES, USTED TIENE DERECHO A RECIBIR UN DESCUENTO EN EL PAGO DE LOS PARAFISCALES DE 75% EN EL PRIMER AÑO DE CONSTITUCION DE SU EMPRESA, DE 50% EN EL SEGUNDO AÑO Y DE 25% EN EL TERCER AÑO. LEY 590 DE 2000 Y DECRETO 525 DE 2009.

RECUERDE INGRESAR A WWW.SUPERSOCIEDADES.GOV.CO PARA VERIFICAR SI SU EMPRESA ESTA OBLIGADA A REMITIR ESTADOS FINANCIEROS. EVITE SANCIONES.

TAMAÑO EMPRESA

DE CONFORMIDAD CON LO PREVISTO EN EL ARTÍCULO 2.2.1.13.2.1 DEL DECRETO 1074 DE 2015 Y LA RESOLUCIÓN 2225 DE 2019 DEL DANE EL TAMAÑO DE LA EMPRESA ES PEQUEÑA

LO ANTERIOR DE ACUERDO A LA INFORMACIÓN REPORTADA POR EL MATRICULADO O INSCRITO EN EL FORMULARIO RUES:

INGRESOS POR ACTIVIDAD ORDINARIA \$12,992,962,000

ACTIVIDAD ECONÓMICA POR LA QUE PERCIBIÓ MAYORES INGRESOS EN EL PERÍODO
- CIIU : 4649

** ESTE CERTIFICADO REFLEJA LA SITUACION JURIDICA DE LA **
** SOCIEDAD HASTA LA FECHA Y HORA DE SU EXPEDICION. **

EL SECRETARIO DE LA CAMARA DE COMERCIO,
VALOR : \$ 6,100

PARA VERIFICAR QUE EL CONTENIDO DE ESTE CERTIFICADO CORRESPONDA CON LA
INFORMACIÓN QUE REPOSA EN LOS REGISTROS PÚBLICOS DE LA CÁMARA DE
COMERCIO DE BOGOTÁ, EL CÓDIGO DE VERIFICACIÓN PUEDE SER VALIDADO POR
SU DESTINATARIO SOLO UNA VEZ, INGRESANDO A WWW.CCB.ORG.CO

ESTE CERTIFICADO FUE GENERADO ELECTRÓNICAMENTE CON FIRMA DIGITAL Y
CUENTA CON PLENA VALIDEZ JURÍDICA CONFORME A LA LEY 527 DE 1999.

FIRMA MECÁNICA DE CONFORMIDAD CON EL DECRETO 2150 DE 1995 Y LA
AUTORIZACIÓN IMPARTIDA POR LA SUPERINTENDENCIA DE INDUSTRIA Y
COMERCIO, MEDIANTE EL OFICIO DEL 18 DE NOVIEMBRE DE 1996.





Cámara de Comercio
de Duitama

**CAMARA DE COMERCIO DE DUITAMA
COMERCIALIZADORA SERLE.COM SAS**

Fecha expedición: 2020/10/15 - 15:24:27

*** SOLO CONSULTA SIN VALIDEZ JURÍDICA ***
CODIGO DE VERIFICACIÓN RvB8y4Vbvt

CERTIFICADO DE EXISTENCIA Y REPRESENTACIÓN LEGAL O DE INSCRIPCIÓN DE DOCUMENTOS.

Con fundamento en las matrículas e inscripciones del Registro Mercantil,

CERTIFICA

NOMBRE, SIGLA, IDENTIFICACIÓN Y DOMICILIO

NOMBRE o RAZÓN SOCIAL: COMERCIALIZADORA SERLE.COM SAS
ORGANIZACIÓN JURÍDICA: SOCIEDAD POR ACCIONES SIMPLIFICADA
CATEGORÍA : PERSONA JURÍDICA PRINCIPAL
NIT : 800089897-4
ADMINISTRACIÓN DIAN : SOGAMOSO
DOMICILIO : DUITAMA

MATRÍCULA - INSCRIPCIÓN

MATRÍCULA NO : 14945
FECHA DE MATRÍCULA : MARZO 22 DE 1990
ULTIMO AÑO RENOVADO : 2020
FECHA DE RENOVACION DE LA MATRÍCULA : FEBRERO 26 DE 2020
ACTIVO TOTAL : 4,123,131,691.00
GRUPO NIIF : GRUPO II

UBICACIÓN Y DATOS GENERALES

DIRECCIÓN DEL DOMICILIO PRINCIPAL : CL 14 15 18 P. 4
MUNICIPIO / DOMICILIO: 15238 - DUITAMA
TELÉFONO COMERCIAL 1 : 7654505
TELÉFONO COMERCIAL 2 : 7654505
TELÉFONO COMERCIAL 3 : 7654505
CORREO ELECTRÓNICO No. 1 : gerenciaserlecom@gmail.com

DIRECCIÓN PARA NOTIFICACIÓN JUDICIAL : CL 14 15 18 P. 4
MUNICIPIO : 15238 - DUITAMA
TELÉFONO 1 : 7654505
CORREO ELECTRÓNICO : financieraserlecom@gmail.com

NOTIFICACIONES A TRAVÉS DE CORREO ELECTRÓNICO

De acuerdo con lo establecido en el artículo 67 del Código de Procedimiento Administrativo y de lo Contencioso Administrativo, **NO AUTORIZO** para que me notifiquen personalmente a través del correo electrónico de notificación.

CERTIFICA - ACTIVIDAD ECONÓMICA

ACTIVIDAD PRINCIPAL : G4651 - COMERCIO AL POR MAYOR DE COMPUTADORES, EQUIPO PERIFERICO Y PROGRAMAS DE INFORMATICA
ACTIVIDAD SECUNDARIA : G4649 - COMERCIO AL POR MAYOR DE OTROS UTENSILIOS DOMESTICOS N.C.P.
OTRAS ACTIVIDADES : L6810 - ACTIVIDADES INMOBILIARIAS REALIZADAS CON BIENES PROPIOS O ARRENDADOS
OTRAS ACTIVIDADES : G4644 - COMERCIO AL POR MAYOR DE APARATOS Y EQUIPO DE USO DOMESTICO

CERTIFICA - AFILIACIÓN

EL COMERCIANTE ES UN AFILIADO DE ACUERDO CON LOS TÉRMINOS ESTABLECIDOS EN EL ARTÍCULO 12 DE LA LEY 1727 DE 2014.

CERTIFICA - CONSTITUCIÓN

POR ESCRITURA PUBLICA NÚMERO 431 DEL 12 DE MARZO DE 1990 DE LA Notaria 1a. de Duitama DE DUITAMA, REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 2927 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 22 DE MARZO DE 1990, SE



Cámara de Comercio
de Duitama

**CAMARA DE COMERCIO DE DUITAMA
COMERCIALIZADORA SERLE.COM SAS**

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CODIGO DE VERIFICACIÓN RvB8y4Vbvt

INSCRIBE : LA CONSTITUCIÓN DE PERSONA JURIDICA DENOMINADA SERLECOM LTDA. SERVICIOS ESPECIALIZADOS.

CERTIFICA - RELACION DE NOMBRES QUE HA TENIDO

QUE LA PERSONA JURÍDICA HA TENIDO LOS SIGUIENTES NOMBRES O RAZONES SOCIALES

1) SERLECOM LTDA. SERVICIOS ESPECIALIZADOS
Actual.) COMERCIALIZADORA SERLE.COM SAS

CERTIFICA - CAMBIOS DE NOMBRE O RAZON SOCIAL

POR ACTA NÚMERO 24 DEL 25 DE OCTUBRE DE 2010 SUSCRITO POR JUNTA EXTRAORDINARIA DE SOCIOS REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 11921 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 29 DE DICIEMBRE DE 2010, LA PERSONA JURIDICA CAMBIO SU NOMBRE DE SERLECOM LTDA. SERVICIOS ESPECIALIZADOS POR COMERCIALIZADORA SERLE.COM SAS

CERTIFICA - TRANSFORMACIONES / CONVERSIONES

POR ACTA NÚMERO 24 DEL 25 DE OCTUBRE DE 2010 SUSCRITA POR JUNTA EXTRAORDINARIA DE SOCIOS, REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 11921 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 29 DE DICIEMBRE DE 2010, SE INSCRIBE LA TRANSFORMACION : TRANSFORMACION DE SOCIEDAD LTDA A SOCIEDAD POR ACCIONES SIMPLIFICADA

CERTIFICA - REFORMAS

DOCUMENTO	FECHA	PROCEDENCIA	DOCUMENTO	INSCRIPCION	FECHA
EP-1039	19910523	NOTARIA 1A. DE DUITAMA		RM09-3230	19910527
EP-1039	19910523	NOTARIA 1A. DE DUITAMA		RM09-3230	19910527
EP-2914	19951114	NOTARIA 1A. DE DUITAMA		RM09-4696	19951114
EP-3629	19971114	NOTARIA 1A. DE DUITAMA		RM09-5643	19980429
EP-1195	19990514	NOTARIA 1A. DE DUITAMA		RM09-6039	19990524
EP-1097	20030617	NOTARIA PRIMERA	DUITAMA	RM09-7733	20030619
EP-403	20090302	NOTARIA PRIMERA	DUITAMA	RM09-10828	20090309
AC-24	20101025	JUNTA EXTRAORDINARIA DE SOCIOS	DUITAMA	RM09-11921	20101229
CE-1	20121231	REVISOR FISCAL	DUITAMA	RM09-13742	20130206
AC-30	20130604	ASAMBLEA GENERAL EXTRAORDINARIA	DUITAMA	RM09-14118	20130613
AC-33	20140325	ASAMBLEA GENERAL EXTRAORDINARIA	DUITAMA	RM09-14769	20140408
AC-39	20161215	ASAMBLEA EXTRAORDINARIA DE ACCIONISTAS	DUITAMA	RM09-17406	20170124

CERTIFICA - VIGENCIA

VIGENCIA: QUE EL TÉRMINO DE DURACIÓN DE LA PERSONA JURÍDICA ES INDEFINIDO.

CERTIFICA - OBJETO SOCIAL

OBJETO SOCIAL: LA SOCIEDAD PUEDE REALIZAR EN COLOMBIA Y EN EL EXTERIOR CUALQUIER ACTIVIDAD LÍCITA COMERCIAL O CIVIL.

CERTIFICA - CAPITAL

TIPO DE CAPITAL	VALOR	ACCIONES	VALOR NOMINAL
CAPITAL AUTORIZADO	1.000.000.000,00	100.000,00	10.000,00
CAPITAL SUSCRITO	1.000.000.000,00	100.000,00	10.000,00
CAPITAL PAGADO	1.000.000.000,00	100.000,00	10.000,00

CERTIFICA - REPRESENTACIÓN LEGAL

REPRESENTACION LEGAL: EL REPRESENTANTE LEGAL DE LA SOCIEDAD ES EL GERENTE QUIEN SERA REEMPLAZADO EN SUS FALTAS ABSOLUTAS, TEMPORALES, OCASIONALES O ACCIDENTALES POR EL SUBGERENTE, CON LAS MISMAS FACULTADES DE AQUEL. LOS REPRESENTANTES LEGALES TENDRAN LA ADMINISTRACION Y GESTION DE LOS NEGOCIOS SOCIALES CON SUJECCION A LA LEY, LOS ESTATUTOS SOCIALES, LOS REGLAMENTOS Y RESOLUCIONES DE LA ASAMBLEA GENERAL DE ACCIONISTAS.



Cámara de Comercio
de Duitama

**CAMARA DE COMERCIO DE DUITAMA
COMERCIALIZADORA SERLE.COM SAS**

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*** SOLO CONSULTA SIN VALIDEZ JURÍDICA ***
CODIGO DE VERIFICACIÓN RvB8y4Vbvt

CERTIFICA

REPRESENTANTES LEGALES - PRINCIPALES

POR ESCRITURA PUBLICA NÚMERO 2914 DEL 14 DE NOVIEMBRE DE 1995 DE Notaria 1a. de Duitama, REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 4696 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 14 DE NOVIEMBRE DE 1995, FUERON NOMBRADOS :

CARGO	NOMBRE	IDENTIFICACION
GERENTE - REPRESENTANTE LEGAL	ALBARRACIN MEDINA RODOLFO ANTONIO	CC 7,217,866

CERTIFICA

REPRESENTANTES LEGALES SUPLENTE

POR ACTA NÚMERO 7 DEL 01 DE MAYO DE 1999 DE Reunion Ordinaria de Socios, REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 6040 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 24 DE MAYO DE 1999, FUERON NOMBRADOS :

CARGO	NOMBRE	IDENTIFICACION
SUBGERENTE - REPRESENTANTE LEGAL SUPLENTE	SIERRA MEDINA MARIA EDITH	CC 46,660,936

CERTIFICA - FACULTADES Y LIMITACIONES

FACULTADES REPRESENTANTE LEGAL: EN DESARROLLO DE LO CONTEMPLADO EN LOS ARTICULOS 99 Y 196 DEL CODIGO DE COMERCIO, SON FUNCIONES Y FACULTADES DEL REPRESENTANTE LEGAL LAS PROPIAS DE SU CARGO Y EN ESPECIAL LAS SIGUIENTES: 1) REPRESENTAR A LA SOCIEDAD JUDICIAL O EXTRAJUDICIALMENTE, ANTE LOS ASOCIADOS, ANTE TERCEROS Y ANTE TODA CLASE DE AUTORIDADES JUDICIALES Y ADMINISTRATIVAS, FUNCIONARIOS, PERSONAS JURIDICAS O NATURALES, ETC., 2) EJECUTAR LOS ACUERDOS Y RESOLUCIONES DE LA ASAMBLEA GENERAL DE ACCIONISTAS (O DEL ACCIONISTA UNICO), 3) EJECUTAR LOS ACTOS Y CELEBRAR LOS CONTRATOS QUE TIENDAN A LLENAR LOS FINES DE LA SOCIEDAD Y EL OBJETO SOCIAL. EN EJERCICIO DE ESTA FACULTAD PODRA: ENAJENAR, ADQUIRIR, MUDAR, GRAVAR, LIMITAR EN CUALQUIER FORMA Y A CUALQUIER TITULO LOS BIENES MUEBLES E INMUEBLES DE LA SOCIEDAD; TRANSIGIR, COMPROMETER, CONCILIAR, DESISTIR, NOVAR, RECIBIR E INTERPONER ACCIONES Y RECURSOS EN CUALQUIER GENERO DE TODOS LOS NEGOCIOS O ASUNTOS DE CUALQUIER INDOLE QUE TENGA PENDIENTE LA SOCIEDAD; CONTRAER OBLIGACIONES CON GARANTIA PERSONAL, PRENDARIA O HIPOTECARIA, DAR O RECIBIR DINERO EN MUTUO, HACER DEPOSITOS BANCARIOS; FIRMAR TODA CLASE DE TITULOS VALORES Y NEGOCIAR ESTA CLASE DE INSTRUMENTOS, FIRMARLOS, ACEPTARLOS, PROTESTARLOS, ENDOSARLOS, PAGARLOS, DESCARGARLOS, TENERLOS O CANCELARLOS; COMPARECER EN JUICIOS EN QUE SE DISCUTE EL DOMINIO DE LOS BIENES SOCIALES DE CUALQUIER CLASE; FORMAR NUEVAS SOCIEDADES O ENTRAR A FORMAR PARTE DE OTRAS YA EXISTENTES, 4) CONSTITUIR LOS APODERADOS JUDICIALES Y EXTRAJUDICIALES QUE JUZGUE NECESARIOS PARA LA ADECUADA REPRESENTACION DE LA SOCIEDAD, DELEGANDOLES LAS FACULTADES QUE ESTIME CONVENIENTE, DE AQUELLAS QUE EL MISMO GOZA, 5) PRESENTAR AL ACCIONISTA(S) EN FORMA PERIODICA, UN INFORME DEL DESARROLLO DEL OBJETO SOCIAL ACOMPAÑADO DE ANEXOS FINANCIEROS Y COMERCIALES, 6) PRESENTAR LOS INFORMES Y DOCUMENTOS DE QUE TRATA EL ARTICULO 446 DEL CODIGO DE COMERCIO, 7) DESIGNAR, PROMOVER Y REMOVER EL PERSONAL DE LA SOCIEDAD SIEMPRE Y CUANDO ELLO NO DEPENDA DE OTRO ORGANO SOCIAL Y SENALAR EL GENERO DE SUS LABORES, REMUNERACIONES, ETC., Y HACER LOS DESPIDOS DEL CASO, 8) CONVOCAR A LA ASAMBLEA GENERAL DE ACCIONISTAS A REUNIONES DE CUALQUIER CARACTER, 9) DELEGAR DETERMINADAS FUNCIONES PROPIAS DE SU CARGO DENTRO DE LOS LIMITES SENALADOS EN ESTOS ESTATUTOS, 10) CUIDAR LA RECAUDACION E INVERSION DE LOS FONDOS DE LA EMPRESA, 11) VELAR PORQUE TODOS LOS EMPLEADOS DE LA SOCIEDAD CUMPLAN Estrictamente SUS DEBERES Y PONER EN CONOCIMIENTO DE LA ASAMBLEA DE ACCIONISTAS LAS IRREGULARIDADES O FALTAS GRAVES QUE OCURRAN SOBRE ESTE PARTICULAR, 12) TODAS LAS DEMAS FUNCIONES NO ATRIBUIDAS POR LOS ACCIONISTA(S) U OTRO ORGANO SOCIAL QUE TENGAN RELACION CON LA DIRECCION, DE LA EMPRESA SOCIAL, Y DE TODAS LAS DEMAS QUE LE DELEGUE LA LEY, LA ASAMBLEA GENERAL. EL REPRESENTANTE LEGAL TIENE AUTORIZACION PARA CELEBRAR TODOS LOS ACTOS Y CONTRATOS COMPRENDIDOS DENTRO DEL OBJETO SOCIAL SIN LIMITE DE CUANTIA.

CERTIFICA

REVISOR FISCAL - PRINCIPALES

POR ACTA NÚMERO 48 DEL 21 DE JULIO DE 2020 DE ASAMBLEA EXTRAORDINARIA DE ACCIONISTAS, REGISTRADO EN ESTA CÁMARA DE COMERCIO BAJO EL NÚMERO 20880 DEL LIBRO IX DEL REGISTRO MERCANTIL EL 14 DE AGOSTO DE 2020, FUERON NOMBRADOS :

CARGO	NOMBRE	IDENTIFICACION	T. PROF



Cámara de Comercio
de Duitama

**CAMARA DE COMERCIO DE DUITAMA
COMERCIALIZADORA SERLE.COM SAS**

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CODIGO DE VERIFICACIÓN RvB8y4Vbvt

REVISOR FISCAL

GOMEZ CONTRERAS SANDRA YOLIMA

CC 1,052,391,016

181383 - T

CERTIFICA - ESTABLECIMIENTOS

QUE ES PROPIETARIO DE LOS SIGUIENTES ESTABLECIMIENTOS DE COMERCIO EN LA JURISDICCIÓN DE ESTA CÁMARA DE COMERCIO:

*** NOMBRE ESTABLECIMIENTO : COMERCIALIZADORA SERLE.COM

MATRICULA : 14946

FECHA DE MATRICULA : 19900322

FECHA DE RENOVACION : 20200226

ULTIMO AÑO RENOVADO : 2020

DIRECCION : CL 14 15 18 P.4

BARRIO : CENTRO

MUNICIPIO : 15238 - DUITAMA

TELEFONO 1 : 7654505

TELEFONO 2 : 3204638214

TELEFONO 3 : 3204638214

CORREO ELECTRONICO : financiera@serlecomsas.com

ACTIVIDAD PRINCIPAL : G4651 - COMERCIO AL POR MAYOR DE COMPUTADORES, EQUIPO PERIFERICO Y PROGRAMAS DE INFORMATICA

ACTIVIDAD SECUNDARIA : G4649 - COMERCIO AL POR MAYOR DE OTROS UTENSILIOS DOMESTICOS N.C.P.

OTRAS ACTIVIDADES : G4659 - COMERCIO AL POR MAYOR DE OTROS TIPOS DE MAQUINARIA Y EQUIPO N.C.P.

OTRAS ACTIVIDADES : G4644 - COMERCIO AL POR MAYOR DE APARATOS Y EQUIPO DE USO DOMESTICO

VALOR DEL ESTABLECIMIENTO : 4,123,131,691

INFORMA - TAMAÑO DE EMPRESA

De conformidad con lo previsto en el artículo 2.2.1.13.2.1 del Decreto 1074 de 2015 y la Resolución 2225 de 2019 del DANE el tamaño de la empresa es PEQUEÑA EMPRESA

Lo anterior de acuerdo a la información reportada por el matriculado o inscrito en el formulario RUES:

Ingresos por actividad ordinaria : \$9,383,346,760

Actividad económica por la que percibió mayores ingresos en el periodo - CIIU : G4651

CERTIFICA

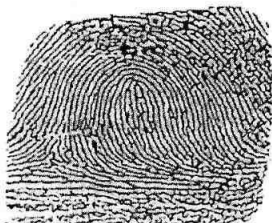
LA INFORMACIÓN ANTERIOR HA SIDO TOMADA DIRECTAMENTE DEL FORMULARIO DE MATRÍCULA Y RENOVACIÓN DILIGENCIADO POR EL COMERCIANTE

REPUBLICA DE COLOMBIA
IDENTIFICACION PERSONAL
CEDULA DE CIUDADANIA

NUMERO 7.217.866

ALBARRACIN MEDINA
APELLIDOS

RODOLFO ANTONIO
NOMBRES



INDICE DE MECERO

FECHA DE NACIMIENTO 28-DIC-1961

DUITAMA
(BOYACA)

LUGAR DE NACIMIENTO

1.68

ESTATURA

A+

G.S RH

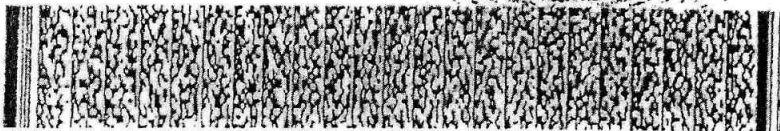
M

SEXO

18-JUN-1980 DUITAMA

FECHA Y LUGAR DE EXPEDICION

REGISTRADORA NACIONAL
ALMAREATRIZ BENDIGO LOPEZ



A-0707900-34121922-M-0007217866-20040820

0359604233A 02 135970041

LA CONTRALORÍA DELEGADA PARA RESPONSABILIDAD FISCAL ,
INTERVENCIÓN JUDICIAL Y COBRO COACTIVO

CERTIFICA:

Que una vez consultado el Sistema de Información del Boletín de Responsables Fiscales 'SIBOR', hoy jueves 22 de octubre de 2020, a las 12:27:43, el número de identificación de la Persona Jurídica, relacionado a continuación, NO SE ENCUENTRA REPORTADO COMO RESPONSABLE FISCAL.

Tipo Documento	NIT
No. Identificación	8000898974
Código de Verificación	8000898974201022122743

Esta Certificación es válida en todo el Territorio Nacional, siempre y cuando el tipo y número consignados en el respectivo documento de identificación, coincidan con los aquí registrados.

De conformidad con el Decreto 2150 de 1995 y la Resolución 220 del 5 de octubre de 2004, la firma mecánica aquí plasmada tiene plena validez para todos los efectos legales.



SORAYA VARGAS PULIDO
CONTRALORA DELEGADA

Digitó y Revisó: WEB



LA CONTRALORÍA DELEGADA PARA RESPONSABILIDAD FISCAL ,
INTERVENCIÓN JUDICIAL Y COBRO COACTIVO

CERTIFICA:

Que una vez consultado el Sistema de Información del Boletín de Responsables Fiscales 'SIBOR', hoy jueves 22 de octubre de 2020, a las 12:28:54, el número de identificación de la Persona Jurídica, relacionado a continuación, NO SE ENCUENTRA REPORTADO COMO RESPONSABLE FISCAL.

Tipo Documento	NIT
No. Identificación	8300488115
Código de Verificación	8300488115201022122854

Esta Certificación es válida en todo el Territorio Nacional, siempre y cuando el tipo y número consignados en el respectivo documento de identificación, coincidan con los aquí registrados.

De conformidad con el Decreto 2150 de 1995 y la Resolución 220 del 5 de octubre de 2004, la firma mecánica aquí plasmada tiene plena validez para todos los efectos legales.



SORAYA VARGAS PULIDO
CONTRALORA DELEGADA

Digitó y Revisó: WEB



LA CONTRALORÍA DELEGADA PARA RESPONSABILIDAD FISCAL ,
INTERVENCIÓN JUDICIAL Y COBRO COACTIVO

CERTIFICA:

Que una vez consultado el Sistema de Información del Boletín de Responsables Fiscales 'SIBOR', hoy jueves 22 de octubre de 2020, a las 12:26:24, el número de identificación, relacionado a continuación, NO SE ENCUENTRA REPORTADO COMO RESPONSABLE FISCAL.

Tipo Documento	CC
No. Identificación	3032904
Código de Verificación	3032904201022122624

Esta Certificación es válida en todo el Territorio Nacional, siempre y cuando el tipo y número consignados en el respectivo documento de identificación, coincidan con los aquí registrados.

De conformidad con el Decreto 2150 de 1995 y la Resolución 220 del 5 de octubre de 2004, la firma mecánica aquí plasmada tiene plena validez para todos los efectos legales.



SORAYA VARGAS PULIDO
CONTRALORA DELEGADA

Digitó y Revisó: WEB



LA CONTRALORÍA DELEGADA PARA RESPONSABILIDAD FISCAL ,
INTERVENCIÓN JUDICIAL Y COBRO COACTIVO

CERTIFICA:

Que una vez consultado el Sistema de Información del Boletín de Responsables Fiscales 'SIBOR', hoy jueves 22 de octubre de 2020, a las 12:25:36, el número de identificación, relacionado a continuación, NO SE ENCUENTRA REPORTADO COMO RESPONSABLE FISCAL.

Tipo Documento	CC
No. Identificación	7217866
Código de Verificación	7217866201022122535

Esta Certificación es válida en todo el Territorio Nacional, siempre y cuando el tipo y número consignados en el respectivo documento de identificación, coincidan con los aquí registrados.

De conformidad con el Decreto 2150 de 1995 y la Resolución 220 del 5 de octubre de 2004, la firma mecánica aquí plasmada tiene plena validez para todos los efectos legales.



SORAYA VARGAS PULIDO
CONTRALORA DELEGADA

Digitó y Revisó: WEB



CERTIFICADO DE ANTECEDENTES

**CERTIFICADO ORDINARIO
No. 152364776**



WEB

12:13:28

Hoja 1 de 01

Bogotá DC, 22 de octubre del 2020

La PROCURADURIA GENERAL DE LA NACIÓN certifica que una vez consultado el Sistema de Información de Registro de Sanciones e Inhabilidades (SIRI), el(la) señor(a) TALENTO COMERCIALIZADORA S A identificado(a) con NIT número 8300488115:

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

ADVERTENCIA: La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y, en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento. Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 Ley 734 de 2002).

NOTA: El certificado de antecedentes disciplinarios es un documento que contiene las anotaciones e inhabilidades generadas por sanciones penales, disciplinarias, inhabilidades que se deriven de las relaciones contractuales con el estado, de los fallos con responsabilidad fiscal, de las decisiones de pérdida de investidura y de las condenas proferidas contra servidores, ex servidores públicos y particulares que desempeñen funciones públicas en ejercicio de la acción de repetición o llamamiento en garantía. **Este documento tiene efectos para acceder al sector público, en los términos que establezca la ley o demás disposiciones vigentes.** Se integran al registro de antecedentes solamente los reportes que hagan las autoridades nacionales colombianas. En caso de nombramiento o suscripción de contratos con el estado, es responsabilidad de la Entidad, validar la información que presente el aspirante en la página web: <http://www.procuraduria.gov.co/portal/antecedentes.html>

MARIO ENRIQUE CASTRO GONZALEZ
Jefe División Centro de Atención al Público (CAP)

ATENCIÓN :

ESTE CERTIFICADO CONSTA DE 01 HOJA(S), SOLO ES VALIDO EN SU TOTALIDAD. VERIFIQUE QUE EL NUMERO DEL CERTIFICADO SEA EL MISMO EN TODAS LAS HOJAS.

CERTIFICADO DE ANTECEDENTES

CERTIFICADO ORDINARIO
No. 152365423



WEB

12:22:45

Hoja 1 de 01

Bogotá DC, 22 de octubre del 2020

La PROCURADURIA GENERAL DE LA NACIÓN certifica que una vez consultado el Sistema de Información de Registro de Sanciones e Inhabilidades (SIRI), el(la) señor(a) COMERCIALIZADORA SERLE. COM S.A.S. identificado(a) con NIT número 8000898974:

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

ADVERTENCIA: La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y, en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento. Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 Ley 734 de 2002).

NOTA: El certificado de antecedentes disciplinarios es un documento que contiene las anotaciones e inhabilidades generadas por sanciones penales, disciplinarias, inhabilidades que se deriven de las relaciones contractuales con el estado, de los fallos con responsabilidad fiscal, de las decisiones de pérdida de investidura y de las condenas proferidas contra servidores, ex servidores públicos y particulares que desempeñen funciones públicas en ejercicio de la acción de repetición o llamamiento en garantía. **Este documento tiene efectos para acceder al sector público, en los términos que establezca la ley o demás disposiciones vigentes.** Se integran al registro de antecedentes solamente los reportes que hagan las autoridades nacionales colombianas. En caso de nombramiento o suscripción de contratos con el estado, es responsabilidad de la Entidad, validar la información que presente el aspirante en la página web: <http://www.procuraduria.gov.co/portal/antecedentes.html>

MARIO ENRIQUE CASTRO GONZALEZ
Jefe División Centro de Atención al Público (CAP)

ATENCIÓN :

ESTE CERTIFICADO CONSTA DE 01 HOJA(S), SOLO ES VALIDO EN SU TOTALIDAD. VERIFIQUE QUE EL NUMERO DEL CERTIFICADO SEA EL MISMO EN TODAS LAS HOJAS.

CERTIFICADO DE ANTECEDENTES

CERTIFICADO ORDINARIO
No. 152364699



WEB

12:12:27

Hoja 1 de 01

Bogotá DC, 22 de octubre del 2020

La PROCURADURIA GENERAL DE LA NACIÓN certifica que una vez consultado el Sistema de Información de Registro de Sanciones e Inhabilidades (SIRI), el(la) señor(a) RODOLFO ANTONIO ALBARRACIN MEDINA identificado(a) con Cédula de ciudadanía número 7217866:

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

ADVERTENCIA: La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y, en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento. Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 Ley 734 de 2002).

NOTA: El certificado de antecedentes disciplinarios es un documento que contiene las anotaciones e inhabilidades generadas por sanciones penales, disciplinarias, inhabilidades que se deriven de las relaciones contractuales con el estado, de los fallos con responsabilidad fiscal, de las decisiones de pérdida de investidura y de las condenas proferidas contra servidores, ex servidores públicos y particulares que desempeñen funciones públicas en ejercicio de la acción de repetición o llamamiento en garantía. **Este documento tiene efectos para acceder al sector público, en los términos que establezca la ley o demás disposiciones vigentes.** Se integran al registro de antecedentes solamente los reportes que hagan las autoridades nacionales colombianas. En caso de nombramiento o suscripción de contratos con el estado, es responsabilidad de la Entidad, validar la información que presente el aspirante en la página web: <http://www.procuraduria.gov.co/portal/antecedentes.html>

MARIO ENRIQUE CASTRO GONZALEZ
Jefe División Centro de Atención al Público (CAP)

ATENCIÓN :

ESTE CERTIFICADO CONSTA DE 01 HOJA(S), SOLO ES VALIDO EN SU TOTALIDAD. VERIFIQUE QUE EL NUMERO DEL CERTIFICADO SEA EL MISMO EN TODAS LAS HOJAS.

CERTIFICADO DE ANTECEDENTES

CERTIFICADO ORDINARIO
No. 152364577



WEB

12:11:02

Hoja 1 de 01

Bogotá DC, 22 de octubre del 2020

La PROCURADURIA GENERAL DE LA NACIÓN certifica que una vez consultado el Sistema de Información de Registro de Sanciones e Inhabilidades (SIRI), el(la) señor(a) GERMAN LEONARDO RODRIGUEZ VARGAS identificado(a) con Cédula de ciudadanía número 3032904:

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

ADVERTENCIA: La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y, en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento. Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 Ley 734 de 2002).

NOTA: El certificado de antecedentes disciplinarios es un documento que contiene las anotaciones e inhabilidades generadas por sanciones penales, disciplinarias, inhabilidades que se deriven de las relaciones contractuales con el estado, de los fallos con responsabilidad fiscal, de las decisiones de pérdida de investidura y de las condenas proferidas contra servidores, ex servidores públicos y particulares que desempeñen funciones públicas en ejercicio de la acción de repetición o llamamiento en garantía. **Este documento tiene efectos para acceder al sector público, en los términos que establezca la ley o demás disposiciones vigentes.** Se integran al registro de antecedentes solamente los reportes que hagan las autoridades nacionales colombianas. En caso de nombramiento o suscripción de contratos con el estado, es responsabilidad de la Entidad, validar la información que presente el aspirante en la página web: <http://www.procuraduria.gov.co/portal/antecedentes.html>

MARIO ENRIQUE CASTRO GONZALEZ
Jefe División Centro de Atención al Público (CAP)

ATENCIÓN :

ESTE CERTIFICADO CONSTA DE 01 HOJA(S), SOLO ES VALIDO EN SU TOTALIDAD. VERIFIQUE QUE EL NUMERO DEL CERTIFICADO SEA EL MISMO EN TODAS LAS HOJAS.



POLICÍA NACIONAL
DE COLOMBIA



Consulta en línea de Antecedentes Penales y Requerimientos Judiciales

La Policía Nacional de Colombia informa:

Que siendo las 12:39:35 horas del 22/10/2020, el ciudadano identificado con:

Cédula de Ciudadanía N° **3032904**

Apellidos y Nombres: **RODRIGUEZ VARGAS GERMAN LEONARDO**

NO TIENE ASUNTOS PENDIENTES CON LAS AUTORIDADES JUDICIALES

de conformidad con lo establecido en el artículo 248 de la Constitución Política de Colombia.

En cumplimiento de la Sentencia SU-458 del 21 de junio de 2012, proferida por la Honorable Corte Constitucional, la leyenda “NO TIENE ASUNTOS PENDIENTES CON LAS AUTORIDADES JUDICIALES” aplica para todas aquellas personas que no registran antecedentes y para quienes la autoridad judicial competente haya decretado la extinción de la condena o la prescripción de la pena.

Esta consulta es válida siempre y cuando el número de identificación y nombres, correspondan con el documento de identidad registrado y solo aplica para el territorio colombiano de acuerdo a lo establecido en el ordenamiento constitucional.

Si tiene alguna duda con el resultado, consulte las **preguntas frecuentes** o acérquese a las **instalaciones de la Policía Nacional** más cercanas.



Dirección: Calle 18A # 69F-45
Zona Industrial, barrio
Montevideo, Bogotá D.C.
Atención administrativa: lunes a
viernes 7:00 am a 1:00 pm y 2:00
pm a 5:00 pm
Línea de atención al ciudadano:
5159700 ext. 30552 (Bogotá)
Resto del país: 018000 910 112
E-mail:
lineadirecta@policia.gov.co



Presidencia de
la República



Ministerio de
Defensa Nacional



Portal Único
de Contratación

Todos los derechos reservados.



Gobierno en
Línea





Bogotá D.C., 22 de Octubre de 2020 - 12:32 pm

**CERTIFICADO DE ANTECEDENTES DISCIPLINARIOS
LA PERSONERÍA DE BOGOTÁ, D.C.**

CERTIFICA

Que una vez consultado el sistema de Registro de Sanciones e Inhabilidades Disciplinarias de la Personería de Bogotá D.C., el señor(a) **RODOLFO ANTONIO ALBARRACIN MEDINA**, quien se identifica con la CÉDULA DE CIUDADANÍA No.: **SIETE MILLONES DOSCIENTOS DIECISIETE MIL OCHOCIENTOS SESENTA Y SEIS** de DUITAMA

7217866

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

Esta Certificación es válida, siempre y cuando el número consignado en el respectivo documento de identificación, coincida con el aquí registrado. El certificado de Antecedentes Disciplinarios expedido por la Personería de Bogotá D.C., contiene las anotaciones de sanciones e inhabilidades disciplinarias que reporten las Entidades Distritales y las dependencias de la Personería de Bogotá D.C., con atribuciones Disciplinarias.

ADVERTENCIAS:

La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento.

Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 - Ley 734 de 2002).

Tres o más sanciones disciplinarias en los últimos cinco (5) años por faltas graves o leves dolosas o por ambas, constituye inhabilidad para desempeñar cargos públicos (Numeral 2, art. 38 - Ley 734 de 2002).

Certificado expedido de conformidad con el artículo 102 numeral 5 del Decreto Ley 1421 de 1993, Ley 734 de 2002 y las Resoluciones Nos. 328 del 27 de junio de 2002, 042 del 14 de febrero de 2003 y 616 del 10 de noviembre de 2004, de la Personería de Bogotá D.C.

Para todos los efectos esta certificación debe ser complementada con la expedida por la Procuraduría General de la Nación.

El presente certificado tiene vigencia de tres (3) meses a partir de la fecha de su expedición.

Certificado expedido sin costo alguno.



JUAN RAMÓN JIMENEZ OSORIO
Jefe Oficina Asesora Jurídica

Este Certificado ha sido generado a través de la página web www.personeriabogota.gov.co. Para verificar su validez comuníquese con la Personería de Bogotá D.C.

Cra. 7 No. 21 - 24 - Conmutador 3820450/80 - www.personeriabogota.gov.co

El código de verificación para la autenticidad del documento es: **_SB9H_**

Link de verificación -> <http://www.personeriabogota.gov.co/antecedentes-disciplinarios>



Bogotá D.C., 22 de Octubre de 2020 - 12:32 pm

**CERTIFICADO DE ANTECEDENTES DISCIPLINARIOS
LA PERSONERÍA DE BOGOTÁ, D.C.**

CERTIFICA

Que una vez consultado el sistema de Registro de Sanciones e Inhabilidades Disciplinarias de la Personería de Bogotá D.C., el señor(a) **RODOLFO ANTONIO ALBARRACIN MEDINA**, quien se identifica con la CÉDULA DE CIUDADANÍA No.: **SIETE MILLONES DOSCIENTOS DIECISIETE MIL OCHOCIENTOS SESENTA Y SEIS** de DUITAMA

7217866

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

Esta Certificación es válida, siempre y cuando el número consignado en el respectivo documento de identificación, coincida con el aquí registrado. El certificado de Antecedentes Disciplinarios expedido por la Personería de Bogotá D.C., contiene las anotaciones de sanciones e inhabilidades disciplinarias que reporten las Entidades Distritales y las dependencias de la Personería de Bogotá D.C., con atribuciones Disciplinarias.

ADVERTENCIAS:

La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento.

Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 - Ley 734 de 2002).

Tres o más sanciones disciplinarias en los últimos cinco (5) años por faltas graves o leves dolosas o por ambas, constituye inhabilidad para desempeñar cargos públicos (Numeral 2, art. 38 - Ley 734 de 2002).

Certificado expedido de conformidad con el artículo 102 numeral 5 del Decreto Ley 1421 de 1993, Ley 734 de 2002 y las Resoluciones Nos. 328 del 27 de junio de 2002, 042 del 14 de febrero de 2003 y 616 del 10 de noviembre de 2004, de la Personería de Bogotá D.C.

Para todos los efectos esta certificación debe ser complementada con la expedida por la Procuraduría General de la Nación.

El presente certificado tiene vigencia de tres (3) meses a partir de la fecha de su expedición.

Certificado expedido sin costo alguno.

JUAN RAMÓN JIMENEZ OSORIO
Jefe Oficina Asesora Jurídica

Este Certificado ha sido generado a través de la página web www.personeriabogota.gov.co. Para verificar su validez comuníquese con la Personería de Bogotá D.C.

Cra. 7 No. 21 - 24 - Conmutador 3820450/80 - www.personeriabogota.gov.co

El código de verificación para la autenticidad del documento es: **_SB9H_**

Link de verificación -> <http://www.personeriabogota.gov.co/antecedentes-disciplinarios>



Portal de Servicios al Ciudadano PSC

Sistema Registro Nacional de Medidas Correctivas RNMC

 Consulta Ciudadano

La Policía Nacional de Colombia informa:

Que a la fecha, 22/10/2020 12:41:08 p. m. el ciudadano con Cédula de Ciudadanía N°. 7217866 y Nombres: RODOLFO ANTONIO ALBARRACIN MEDINA.

NO TIENE MEDIDAS CORRECTIVAS PENDIENTES POR CUMPLIR.

De conformidad con la Ley 1801 de 2016 "Por la cual se expide el Código Nacional de Seguridad y Convivencia Ciudadana". Registro interno de validación No. 16738547 . La persona interesada podrá verificar la autenticidad del presente documento a través de la página web institucional digitando <https://www.policia.gov.co>, menú ciudadanos/ consulta medidas correctivas, con el documento de identidad y la fecha de expedición del mismo. Esta consulta es válida siempre y cuando el número de cédula corresponda con el documento de identidad suministrado.

 Nueva Busqueda Imprimir

Información

5159000

Policía Nacional de Colombia
Dirección General - Cra. 59 No. 26 - 21
Centro Administrativo Nacional (CAN) Bogotá D.C.
Línea de atención: 018000-910112

www.policia.gov.co



Bogotá D.C., 23 de Octubre de 2020 - 19:07 pm

**CERTIFICADO DE ANTECEDENTES DISCIPLINARIOS
LA PERSONERÍA DE BOGOTÁ, D.C.**

CERTIFICA

Que una vez consultado el sistema de Registro de Sanciones e Inhabilidades Disciplinarias de la Personería de Bogotá D.C., el señor(a) **GERMAN LEONARDO RODRIGUEZ VARGAS**, quien se identifica con la CÉDULA DE CIUDADANÍA No.: **TRES MILLONES TREINTA Y DOS MIL NOVECIENTOS CUATRO** de GACHETA

3032904

NO REGISTRA SANCIONES NI INHABILIDADES VIGENTES

Esta Certificación es válida, siempre y cuando el número consignado en el respectivo documento de identificación, coincida con el aquí registrado. El certificado de Antecedentes Disciplinarios expedido por la Personería de Bogotá D.C., contiene las anotaciones de sanciones e inhabilidades disciplinarias que reporten las Entidades Distritales y las dependencias de la Personería de Bogotá D.C., con atribuciones Disciplinarias.

ADVERTENCIAS:

La certificación de antecedentes deberá contener las anotaciones de providencias ejecutoriadas dentro de los cinco (5) años anteriores a su expedición y en todo caso, aquellas que se refieren a sanciones o inhabilidades que se encuentren vigentes en dicho momento.

Cuando se trate de nombramiento o posesión en cargos que exijan para su desempeño ausencia de antecedentes, se certificarán todas las anotaciones que figuren en el registro. (Artículo 174 - Ley 734 de 2002).

Tres o más sanciones disciplinarias en los últimos cinco (5) años por faltas graves o leves dolosas o por ambas, constituye inhabilidad para desempeñar cargos públicos (Numeral 2, art. 38 - Ley 734 de 2002).

Certificado expedido de conformidad con el artículo 102 numeral 5 del Decreto Ley 1421 de 1993, Ley 734 de 2002 y las Resoluciones Nos. 328 del 27 de junio de 2002, 042 del 14 de febrero de 2003 y 616 del 10 de noviembre de 2004, de la Personería de Bogotá D.C.

Para todos los efectos esta certificación debe ser complementada con la expedida por la Procuraduría General de la Nación.

El presente certificado tiene vigencia de tres (3) meses a partir de la fecha de su expedición.

Certificado expedido sin costo alguno.

JUAN RAMÓN JIMENEZ OSORIO
Jefe Oficina Asesora Jurídica

Este Certificado ha sido generado a través de la página web www.personeriabogota.gov.co. Para verificar su validez comuníquese con la Personería de Bogotá D.C.

Cra. 7 No. 21 - 24 - Conmutador 3820450/80 - www.personeriabogota.gov.co

El código de verificación para la autenticidad del documento es: **_XPKTL_**

Link de verificación -> <http://www.personeriabogota.gov.co/antecedentes-disciplinarios>



Portal de Servicios al Ciudadano PSC

Sistema Registro Nacional de Medidas Correctivas RNMC

 Consulta Ciudadano

La Policía Nacional de Colombia informa:

Que a la fecha, 23/10/2020 07:10:27 p. m. el ciudadano con Cédula de Ciudadanía N°. 3032904 y Nombres: GERMAN LEONARDO RODRIGUEZ VARGAS.

NO TIENE MEDIDAS CORRECTIVAS PENDIENTES POR CUMPLIR.

De conformidad con la Ley 1801 de 2016 "Por la cual se expide el Código Nacional de Seguridad y Convivencia Ciudadana". Registro interno de validación No. 16771616 . La persona interesada podrá verificar la autenticidad del presente documento a través de la página web institucional digitando <https://www.policia.gov.co>, menú ciudadanos/ consulta medidas correctivas, con el documento de identidad y la fecha de expedición del mismo. Esta consulta es válida siempre y cuando el número de cédula corresponda con el documento de identidad suministrado.

 Nueva Busqueda Imprimir

Información 5159000

Policía Nacional de Colombia
Dirección General - Cra. 59 No. 26 - 21
Centro Administrativo Nacional (CAN) Bogotá D.C.
Línea de atención: 018000-910112

www.policia.gov.co



POLICÍA NACIONAL
DE COLOMBIA



Consulta en línea de Antecedentes Penales y Requerimientos Judiciales

La Policía Nacional de Colombia informa:

Que siendo las 19:19:27 horas del 23/10/2020, el ciudadano identificado con:

Cédula de Ciudadanía N° **7217866**

Apellidos y Nombres: **ALBARRACIN MEDINA RODOLFO ANTONIO**

NO TIENE ASUNTOS PENDIENTES CON LAS AUTORIDADES JUDICIALES

de conformidad con lo establecido en el artículo 248 de la Constitución Política de Colombia.

En cumplimiento de la Sentencia SU-458 del 21 de junio de 2012, proferida por la Honorable Corte Constitucional, la leyenda “NO TIENE ASUNTOS PENDIENTES CON LAS AUTORIDADES JUDICIALES” aplica para todas aquellas personas que no registran antecedentes y para quienes la autoridad judicial competente haya decretado la extinción de la condena o la prescripción de la pena.

Esta consulta es válida siempre y cuando el número de identificación y nombres, correspondan con el documento de identidad registrado y solo aplica para el territorio colombiano de acuerdo a lo establecido en el ordenamiento constitucional.

Si tiene alguna duda con el resultado, consulte las **preguntas frecuentes** o acérquese a las **instalaciones de la Policía Nacional** más cercanas.



Dirección: Calle 18A # 69F-45
Zona Industrial, barrio
Montevideo. Bogotá D.C.
Atención administrativa: lunes a
viernes 7:00 am a 1:00 pm y 2:00
pm a 5:00 pm
Línea de atención al ciudadano:
5159700 ext. 30552 (Bogotá)
Resto del país: 018000 910 112
E-mail:
lineadirecta@policia.gov.co



Presidencia de
la República



Ministerio de
Defensa Nacional



Portal Único
de Contratación

Todos los derechos reservados.



Gobierno en
Línea

UT SERTAL CCE TECNOLOGÍA

CARTA INFORMACIÓN DE UNIÓN TEMPORAL

Bogotá D.C., 17 de Septiembre 2019

SEÑORES
COLOMBIA COMPRA EFICIENTE
Bogotá

ACUERDO MARCO PROCESO DE SELECCIÓN CCENEG-018-01-2019

Apreciados Señores:

Los representantes **GERMAN LEONARDO RODRIGUEZ VARGAS** y **RODOLFO ANTONIO ALBARRACIN MEDINA**, debidamente autorizados para actuar en nombre de **TALENTO COMERCIALIZADORA S.A.**, y **COMERCIALIZADORA SERLE.COM SAS.**, hemos convenido asociarnos en UNIÓN TEMPORAL para participar en el SELECCIÓN CCENEG-018-01-2019

Por lo tanto manifestamos lo siguiente:

A.- La duración de esta UNIÓN TEMPORAL será igual al término de la ejecución del contrato y un (1) año más.

B.- La UNIÓN TEMPORAL se denominara **UT SERTAL CCE TECNOLOGÍA** y está integrada por las siguientes personas que desarrollarán las actividades con los porcentajes de participación que a continuación se indican:

NOMBRE	IDENTIFICACION o NIT	ITEM A REALIZAR	PORCENTAJE DE PARTICIPACION
TALENTO COMERCIALIZADORA S.A.	830.048.811-5	ELABORACION DE LA PROPUESTA TECNICA Y ECONOMICA PARA SU PRESENTACION, ENTREGA DE LOS BIENES CORRESPONDIENTES AL OBJETO DEL PRESENTE PROCESO DE SELECCIÓN, MANEJO CONTABLE DEL PROYECTO Y EJECUCION DE CADA UNO DE LOS ITEMS A SUMINISTRAR.	50%
COMERCIALIZADORA SERLE.COM SAS.	800.089.897-4	ELABORACION DE LA PROPUESTA TECNICA Y ECONOMICA PARA SU PRESENTACION, ENTREGA DE LOS BIENES CORRESPONDIENTES AL OBJETO DEL PRESENTE PROCESO DE SELECCIÓN, MANEJO CONTABLE DEL PROYECTO Y EJECUCION DE CADA UNO DE LOS ITEMS A SUMINISTRAR.	50%

C.- La responsabilidad de los integrantes de la UNIÓN TEMPORAL será solidaria.

D.- El representante de la UNIÓN TEMPORAL es **RODOLFO ANTONIO ALBARRACIN MEDINA**, identificado con cédula de ciudadanía No. 7.217.866 de Duitama, quien está expresamente facultado para firmar, presentar la propuesta y en caso de salir favorecidos con la adjudicación, para firmar el contrato y tomar todas las determinaciones que fueren necesarias al respecto, con amplias y suficientes facultades.

DIRECCION: CALLE 32 A No. 19 – 22 TELEFONO: 5607707
EMAIL: contratacion@talentoco.com / auxiliar.contratos4@talentoco.com
CIUDAD: BOGOTÁ D.C.

UT SERTAL CCE TECNOLOGÍA

Igualmente se designa un suplente **GERMAN LEONARDO RODRIGUEZ VARGAS** identificado con cedula de ciudadanía No. 3.032.904 de Gacheta, quien está expresamente facultado para reemplazar en los casos de ausencia temporal o definitiva del representante legal de esta unión temporal.

En constancia se firma en la ciudad de Bogotá D.C., a los cuatro (09) días del mes de Septiembre de 2019

Cordialmente;



RODOLFO ANTONIO ALBARRACIN MEDINA
C.C. No. 7.217.866 de Bogotá D.C.
Representante Legal
COMERCIALIZADORASERLE.COM SAS.



GERMAN LEONARDO RODRIGUEZ VARGAS
C.C. No. 3.032.904 de Gacheta
Representante Legal
TALENTO COMERCIALIZADORA SA.

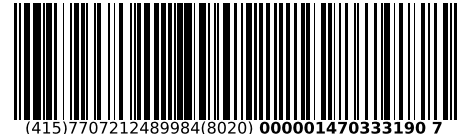


RODOLFO ANTONIO ALBARRACIN MEDINA
C.C. No. 7.217.866 de Bogotá D.C.
Representante Legal
UT SERTAL CCE TECNOLOGÍA

2. Concepto Actualización

4. Número de formulario

14703331907



(415)7707212489984(8020) 000001470333190 7

5. Número de Identificación Tributaria (NIT)

9 0 1 3 3 7 9 8 8

6. DV

7

12. Dirección seccional

Impuestos de Bogotá

14. Buzón electrónico

3 2

IDENTIFICACIÓN

24. Tipo de contribuyente

Persona jurídica

25. Tipo de documento

1

26. Número de Identificación

27. Fecha expedición

Lugar de expedición

28. País

29. Departamento

30. Ciudad/Municipio

31. Primer apellido

32. Segundo apellido

33. Primer nombre

34. Otros nombres

35. Razón social

UT SERTAL CCE TECNOLOGIA

36. Nombre comercial

37. Sigla

UBICACIÓN

38. País

COLOMBIA

1 6 9

39. Departamento

Bogotá D.C.

1 1

40. Ciudad/Municipio

Bogotá, D.C.

0 0 1

41. Dirección principal

CL 32 A 19 22

42. Correo electrónico

contratacion@talentoco.com

43. Código postal

44. Teléfono 1

5 6 0 7 7 0 7

45. Teléfono 2

3 1 2 5 0 6 7 0 2 5

CLASIFICACIÓN

Actividad económica

Ocupación

Actividad principal

46. Código

4 6 5 1

47. Fecha inicio actividad

2 0 1 9 0 9 0 9

Actividad secundaria

48. Código

49. Fecha inicio actividad

Otras actividades

50. Código

1 2

51. Código

52. Número establecimientos

Responsabilidades, Calidades y Atributos

53. Código 7 1 4 4 8

07- Retención en la fuente a título de rent

14- Informante de exogena

48 - Impuesto sobre las ventas - IVA

Obligados aduaneros

Exportadores

54. Código 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

55. Forma 56. Tipo Servicio 1 2 3 57. Modo 58. CPC

IMPORTANTE: Sin perjuicio de las actualizaciones a que haya lugar, la inscripción en el Registro Único Tributario -RUT-, tendrá vigencia indefinida y en consecuencia no se exigirá su renovación

Para uso exclusivo de la DIAN

59. Anexos

SI

NO

X

60. No. de Folios:

0

61. Fecha

2020 - 08 - 13 / 09 : 33: 36

La información suministrada a través del formulario oficial de inscripción, actualización, suspensión y cancelación del Registro Único Tributario (RUT), deberá ser exacta y veraz; en caso de constatar inexactitud en alguno de los datos suministrados se adelantarán los procedimientos administrativos sancionatorios o de suspensión, según el caso.

Parágrafo del artículo 1.6.1.2.20 del Decreto 1625 de 2016

Firma del solicitante:

Sin perjuicio de las verificaciones que la DIAN realice.

Firma autorizada:

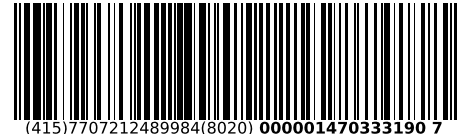
984. Nombre ALBARRACIN MEDINA RODOLFO ANTONIO

985. Cargo Representante legal Certificado

Espacio reservado para la DIAN

4. Número de formulario

14703331907



(415)7707212489984(8020) 000001470333190 7

5. Número de Identificación Tributaria (NIT)

9 0 1 3 3 7 9 8 8 7

6. DV

7

12. Dirección seccional

Impuestos de Bogotá

14. Buzón electrónico

3 2

Características y formas de las organizaciones

62. Naturaleza

2

63. Formas asociativas

64. Entidades o institutos de derecho público de orden nacional, departamental, municipal y descentralizados

65. Fondos

66. Cooperativas

67. Sociedades y organismos extranjeros

68. Sin personería jurídica

7

69. Otras organizaciones no clasificadas

70. Beneficio

1

Constitución, Registro y Última Reforma

Composición del Capital

Documento

1. Constitución

2. Reforma

71. Clase

0 4

72. Número

1 8

73. Fecha

2 0 1 9 0 9 0 9

74. Número de notaría

75. Entidad de registro

9 8

76. Fecha de registro

2 0 1 9 0 9 0 9

77. No. Matricula mercantil

78. Departamento

1 1

79. Ciudad/Municipio

0 0 1

82. Nacional

1 0 0 %

83. Nacional público

0 . 0 %

84. Nacional privado

1 0 0 . 0 %

85. Extranjero

0 %

86. Extranjero público

0 . 0 %

87. Extranjero privado

0 . 0 %

Entidad de vigilancia y control

88. Entidad de vigilancia y control

Estado y Beneficio

Item	89. Estado actual	90. Fecha cambio de estado	91. Número de Identificación Tributaria (NIT)	92. DV
1				-
2				-
3				-
4				-
5				-

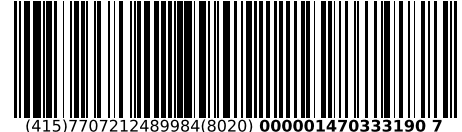
Vinculación económica

93. Vinculación económica	94. Nombre del grupo económico y/o empresarial	95. Número de Identificación Tributaria (NIT) de la Matriz o Controlante	96. DV.
97. Nombre o razón social de la matriz o controlante			
170. Número de identificación tributaria otorgado en el exterior	171. País	172. Número de identificación tributaria sociedad o natural del exterior con EP	
173. Nombre o razón social de la sociedad o natural del exterior con EP			

Espacio reservado para la DIAN

4. Número de formulario

14703331907



(415)7707212489984(8020) 000001470333190 7

5. Número de Identificación Tributaria (NIT)

6. DV

12. Dirección seccional

14. Buzón electrónico

9 0 1 3 3 7 9 8 8 7

Impuestos de Bogotá

3 2

Representación

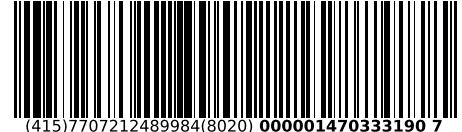
98. Representación REPRS LEGAL PRIN	1 8	99. Fecha inicio ejercicio representación 2 0 1 9 0 9 0 9
100. Tipo de documento Cédula de Ciudadaní 1 3	101. Número de identificación 7 2 1 7 8 6 6	102. DV 103. Número de tarjeta profesional
104. Primer apellido ALBARRACIN	105. Segundo apellido MEDINA	106. Primer nombre RODOLFO
107. Otros nombres ANTONIO		
108. Número de Identificación Tributaria (NIT)	109. DV	110. Razón social representante legal
98. Representación REPRS LEGAL SUPL	1 9	99. Fecha inicio ejercicio representación 2 0 1 9 0 9 0 9
100. Tipo de documento Cédula de Ciudadan 1 3	101. Número de identificación 3 0 3 2 9 0 4	102. DV 103. Número de tarjeta profesional
104. Primer apellido RODRIGUEZ	105. Segundo apellido VARGAS	106. Primer nombre GERMAN
107. Otros nombres LEONARDO		
108. Número de Identificación Tributaria (NIT)	109. DV	110. Razón social representante legal
98. Representación		99. Fecha inicio ejercicio representación
100. Tipo de documento	101. Número de identificación	102. DV 103. Número de tarjeta profesional
104. Primer apellido	105. Segundo apellido	106. Primer nombre
107. Otros nombres		
108. Número de Identificación Tributaria (NIT)	109. DV	110. Razón social representante legal
98. Representación		99. Fecha inicio ejercicio representación
100. Tipo de documento	101. Número de identificación	102. DV 103. Número de tarjeta profesional
104. Primer apellido	105. Segundo apellido	106. Primer nombre
107. Otros nombres		
108. Número de Identificación Tributaria (NIT)	109. DV	110. Razón social representante legal
98. Representación		99. Fecha inicio ejercicio representación
100. Tipo de documento	101. Número de identificación	102. DV 103. Número de tarjeta profesional
104. Primer apellido	105. Segundo apellido	106. Primer nombre
107. Otros nombres		
108. Número de Identificación Tributaria (NIT)	109. DV	110. Razón social representante legal

Espacio reservado para la DIAN



4. Número de formulario

14703331907



(415)7707212489984(8020) 000001470333190 7

5. Número de Identificación Tributaria (NIT) 9 0 1 3 3 7 9 8 8 7	6. DV 7	12. Dirección seccional Impuestos de Bogotá	14. Buzón electrónico 3 2

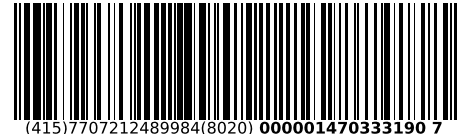
Socios y/o Miembros de Juntas Directivas, Consorcios, Uniones Temporales

1	111. Tipo de documento NIT	3 1	112. Número de identificación 8 3 0 0 4 8 8 1 1	113. DV 5	114. Nacionalidad COLOMBIA	1 6 9
	115. Primer apellido		116. Segundo apellido		117. Primer nombre	118. Otros nombres
	119. Razón social TALENTO COMERCIALIZADORA S A					
	120. Valor capital del socio		121. % Participación		122. Fecha de ingreso 5 0 2 0 1 9 0 9 0 9	123. Fecha de retiro
2	111. Tipo de documento NIT	3 1	112. Número de identificación 8 0 0 0 8 9 8 9 7	113. DV 4	114. Nacionalidad COLOMBIA	1 6 9
	115. Primer apellido		116. Segundo apellido		117. Primer nombre	118. Otros nombres
	119. Razón social COMERCIALIZADORA SERLE.COM SAS					
	120. Valor capital del socio		121. % Participación		122. Fecha de ingreso 5 0 2 0 1 9 0 9 0 9	123. Fecha de retiro
3	111. Tipo de documento		112. Número de identificación		113. DV	114. Nacionalidad
	115. Primer apellido		116. Segundo apellido		117. Primer nombre	118. Otros nombres
	119. Razón social					
	120. Valor capital del socio		121. % Participación		122. Fecha de ingreso	123. Fecha de retiro
4	111. Tipo de documento		112. Número de identificación		113. DV	114. Nacionalidad
	115. Primer apellido		116. Segundo apellido		117. Primer nombre	118. Otros nombres
	119. Razón social					
	120. Valor capital del socio		121. % Participación		122. Fecha de ingreso	123. Fecha de retiro
5	111. Tipo de documento		112. Número de identificación		113. DV	114. Nacionalidad
	115. Primer apellido		116. Segundo apellido		117. Primer nombre	118. Otros nombres
	119. Razón social					
	120. Valor capital del socio		121. % Participación		122. Fecha de ingreso	123. Fecha de retiro

Espacio reservado para la DIAN

4. Número de formulario

14703331907



(415)7707212489984(8020) 000001470333190 7

5. Número de Identificación Tributaria (NIT)

6. DV

12. Dirección seccional

14. Buzón electrónico

9 0 1 3 3 7 9 8 8

7

Impuestos de Bogotá

3 2

Revisor Fiscal y Contador

Revisor fiscal principal	124. Tipo de documento	125. Número de identificación	126. DV	127. Número de tarjeta profesional
	128. Primer apellido	129. Segundo apellido	130. Primer nombre	131. Otros nombres
	132. Número de Identificación Tributaria (NIT)	133. DV	134. Sociedad o firma designada	
	135. Fecha de nombramiento			
Revisor fiscal suplente	136. Tipo de documento	137. Número de identificación	138. DV	139. Número de tarjeta profesional
	140. Primer apellido	141. Segundo apellido	142. Primer nombre	143. Otros nombres
	144. Número de Identificación Tributaria (NIT)	145. DV	146. Sociedad o firma designada	
	147. Fecha de nombramiento			
Contador	148. Tipo de documento	149. Número de identificación	150. DV	151. Número de tarjeta profesional
	Cédula de Ciudadanía 1 3	1 0 5 2 3 9 1 0 1 6		1 8 1 3 8 3 T
	152. Primer apellido	153. Segundo apellido	154. Primer nombre	155. Otros nombres
	GOMEZ	CONTRERAS	SANDRA	YOLIMA
156. Número de Identificación Tributaria (NIT)		157. DV	158. Sociedad o firma designada	
159. Fecha de nombramiento				
2 0 2 0 0 7 0 1				

Orden de compra 57318

Información general

Estado	Emitido - Envío por correo electrónico
Fecha de la orden	27/10/20
Fecha de revisión	27/10/20
Solicitud núm.	102094
Solicitante	Mildred Constanza Acuña Díaz
Enviar al usuario	Mildred Constanza Acuña Díaz
Entidad	SECRETARIA DISTRITAL DEL HABITAT
Términos de pago	Según el acuerdo marco
Entidad Compradora 2	Ninguno
Justificación	ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA SECRETARÍA DISTRITAL DEL HÁBITAT - MONITORES
Instrumento de Agregación de Demanda	Compra de ETP II
Asociado al Acuerdo de Paz	No
Supervisor de la Orden de Compra	Mildred Acuña
Telefono Supervisor	3005644222
Fecha de vencimiento (Orden de compra)	04/01/21
Especificaciones adicionales de Entrega	Conforme lo descrito en el estudio previo y simulador
Gravámenes adicionales	Conforme lo descrito en el estudio previo y simulador
N.I.T.	899999061
Datos adjuntos	Ninguno

Dirección

Dirección	CALLE 52 #13-64, PISO 12 110231 BOGOTÁ D.C Colombia A la atención de: Mildred Constanza Acuña Díaz
Términos de envío	Según el acuerdo marco

Proveedor

Nombre	UT SERTAL CCE TECNOLOGÍA
Teléfono (del trabajo)	+57 031 5607707
Teléfono (celular)	+03 312 5067025
Se abrió el mensaje de correo electrónico.	No
Método de transmisión	Predeterminado del proveedor (Correo electrónico)

Seguimiento del envío

No hay seguimiento del envío.

Artículos

Avanzado Buscar Ordenar por... Número de línea: 1						
1	Tipo	Artículo	Cantidad	Unidad	Precio	Total
		etc02--lote1.6-ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1	5	Unidad	2.879.867,00 COP	14.399.335,00 COP
	Recibido	Facturas aprobadas	Facturados pendientes	Total facturado		
	0	0,00 COP	0,00 COP	0,00		
Número de pieza		Mercancía	Nombre del fabricante		Número de pieza del fabricante	
Ninguno		Compra de ETP II	Ninguno		Ninguno	
Ahorro (%)						
0 (cambio)						

Cuenta		Período				
Secretaria Distrital del Habitat						
CDP						
1168						
2	Tipo	Artículo	Cantidad	Unidad	Precio	Total
		etc02--lote1.6-ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA NA Zona 1	1	Unidad	685.043,00 COP	685.043,00 COP
		Recibido	Facturas aprobadas	Facturados pendientes	Total facturado	
		0	0,00 COP	0,00 COP	0,00	
Número de pieza		Mercancía		Nombre del fabricante		Número de pieza del fabricante
Ninguno		Compra de ETP II		Ninguno		Ninguno
Ahorro (%)						
0 (cambio)						
Cuenta		Período				
Secretaria Distrital del Habitat						
CDP						
1168						
3	Tipo	Artículo	Cantidad	Unidad	Precio	Total
		etc02--lote1.6-ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA NA Zona 1	8	Unidad	542.442,00 COP	4.339.536,00 COP
		Recibido	Facturas aprobadas	Facturados pendientes	Total facturado	
		0	0,00 COP	0,00 COP	0,00	
Número de pieza		Mercancía		Nombre del fabricante		Número de pieza del fabricante
Ninguno		Compra de ETP II		Ninguno		Ninguno
Ahorro (%)						
0 (cambio)						
Cuenta		Período				
Secretaria Distrital del Habitat						
CDP						
1168						
4	Tipo	Artículo	Cantidad	Unidad	Precio	Total
		etc02--lote1.6-SERVICIO Garantia extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA NA Zona 1	5	Unidad	29.359,00 COP	146.795,00 COP
		Recibido	Facturas aprobadas	Facturados pendientes	Total facturado	
		0	0,00 COP	0,00 COP	0,00	
Número de pieza		Mercancía		Nombre del fabricante		Número de pieza del fabricante
Ninguno		Compra de ETP II		Ninguno		Ninguno

Ahorro (%)

0 (cambio)

Cuenta

Secretaria Distrital del Habitat
CDP
1168

Período

5	Tipo	Artículo	Cantidad	Unidad	Precio	Total
		etc02--IVA	1	Unidad	3.718.435,00 COP	3.718.435,00 COP

Recibido	Facturas aprobadas	Facturados pendientes	Total facturado
0	0,00 COP	0,00 COP	0,00

Número de pieza

Ninguno

Mercancía

Compra de ETP II

Nombre del fabricante

Ninguno

Número de pieza del fabricante

Ninguno

Ahorro (%)

0 (cambio)

Cuenta

Secretaria Distrital del Habitat
CDP
1168

Período

Por página 15 | 45 | 90

Total 23.289.144,00 COP

Comentarios

Historial

Historial de integración



NIT. 860.009.578-6

POLIZA DE SEGURO DE CUMPLIMIENTO ENTIDAD ESTATAL

DECRETO 1082 DE 2015

CIUDAD DE EXPEDICIÓN BOGOTA, D.C.						SUCURSAL CHAPINERO						COD.SUC 14		NO.PÓLIZA 14-44-101122756		ANEXO 0	
FECHA EXPEDICIÓN			VIGENCIA DESDE			A LAS HORAS	VIGENCIA HASTA			A LAS HORAS	TIPO MOVIMIENTO						
DÍA MES AÑO			DÍA MES AÑO				DÍA MES AÑO										
28 10 2020			27 10 2020			00:00	04 07 2021			23:59	EMISION ORIGINAL						

DATOS DEL TOMADOR / GARANTIZADO

NOMBRE O RAZON SOCIAL UT SERTAL CCE TECNOLOGICA								IDENTIFICACIÓN NIT: 901.337.988-7			
DIRECCIÓN: CL 32 A NRO. 19 - 22						CIUDAD: BOGOTA, D.C., DISTRITO CAPITAL			TELÉFONO: 5607707		

DATOS DEL ASEGURADO / BENEFICIARIO

ASEGURADO / BENEFICIARIO: SECRETARIA DISTRITAL DEL HABITAT								IDENTIFICACIÓN NIT: 899.999.061-9			
DIRECCIÓN: CL 52 NRO. 13 - 64 PISO 12						CIUDAD: BOGOTA, D.C., DISTRITO CAPITAL			TELÉFONO 3581600		

ADICIONAL:

OBJETO DEL SEGURO

CON SUJECCIÓN A LAS CONDICIONES GENERALES DE LA PÓLIZA QUE SE ANEXAN ECU010B, QUE FORMAN PARTE INTEGRANTE DE LA MISMA Y QUE EL ASEGURADO Y EL TOMADOR DECLARAN HABER RECIBIDO Y HASTA EL LÍMITE DE VALOR ASEGURADO SEÑALADO EN CADA AMPARO, SEGUROS DEL ESTADO S.A., GARANTIZA:

GARANTIZAR EL PAGO DE LOS PERJUICIOS DERIVADOS DEL INCUMPLIMIENTO DE LAS OBLIGACIONES CONTENIDAS EN ORDEN DE COMPRA NO. 57318 CUYO OBJETO ES ADQUISICION DE EQUIPOS TECNOLOGICOS PARA LA SECRETARIA DISTRITAL DEL HABITAT - MONITORES.

AMPAROS

RIESGO: SUMINISTRO DE BIENES

AMPAROS	VIGENCIA DESDE	VIGENCIA HASTA	SUMA ASEG/ACTUAL
CUMPLIMIENTO DEL CONTRATO	27/10/2020	04/07/2021	\$2,328,914.40
CALIDAD Y CORRECTO FUNCIONAMIENTO DE LOS BIENES	27/10/2020	04/07/2021	\$2,328,914.40

ACLARACIONES

PARTICIPANTES CONSORCIO - UNION TEMPORAL :

NOMBRE	IDENTIFICACION	PARTICIPACION
TALENTO COMERCIALIZADORA S A	830048811-5	50.00
COMERCIALIZADORA SERLE.COM SAS	800089897-4	50.00

VALOR PRIMA NETA	GASTOS EXPEDICIÓN	IVA	TOTAL A PAGAR	VALOR ASEGURADO TOTAL	PLAN DE PAGO
\$ *****40,000.00	\$ *****7,000.00	\$ *****8,930.00	\$ *****55,930.00	\$ *****4,657,828.80	CONTADO

INTERMEDIARIO			DISTRIBUCION COASEGURO		
NOMBRE	CLAVE	% DE PART.	NOMBRE COMPAÑIA	% PART.	VALOR ASEGURADO
ALIANZA MUTUAL DE SEGUROS AMS LTDA	164207	100.00			

QUEDA EXPRESAMENTE CONVENIDO QUE LAS OBLIGACIONES DE SEGUROS DEL ESTADO S.A. SE REFIERE UNICAMENTE AL OBJETO Y OBSERVACIONES DE LA(S) GARANTIA(S) QUE SE ESPECIFICAN EN ESTE CUADRO.

PARA EFECTOS DE NOTIFICACIONES LA DIRECCIÓN DE SEGUROS DEL ESTADO S.A. ES CRA. 7 NO. 57 -67 - TELEFONO: 2172417 - BOGOTA, D.C.

14-44-101122756

FIRMA AUTORIZADA: Manuel Sarmiento - Vicepresidente de Fianzas

FIRMA TOMADOR

USTED PUEDE CONSULTAR ESTA PÓLIZA EN WWW.SEGUROSDEL ESTADO.COM

OFICINA PRINCIPAL: CRA. 11 NO. 90-20 BOGOTA D.C. TELEFONO: 2186977

DLF164207A

1

NO EFECTUAR RETENCION EN LA FUENTE * RESPONSABLE DE IVA



NIT. 860.009.578-6

POLIZA DE SEGURO DE CUMPLIMIENTO ENTIDAD ESTATAL

DECRETO 1082 DE 2015

CIUDAD DE EXPEDICIÓN BOGOTÁ, D.C.						SUCURSAL CHAPINERO					COD.SUC 14		NO.PÓLIZA 14-44-101122756		ANEXO 0	
FECHA EXPEDICIÓN DÍA MES AÑO			VIGENCIA DESDE DÍA MES AÑO			A LAS HORAS	VIGENCIA HASTA DÍA MES AÑO			A LAS HORAS	TIPO MOVIMIENTO					
28 10 2020			27 10 2020			00:00	04 07 2021			23:59	EMISION ORIGINAL					

DATOS DEL TOMADOR / GARANTIZADO

NOMBRE O RAZON SOCIAL UT SERTAL CCE TECNOLOGICA	IDENTIFICACIÓN NIT: 901.337.988-7
DIRECCIÓN: CL 32 A NRO. 19 - 22	CIUDAD: BOGOTÁ, D.C., DISTRITO CAPITAL TELÉFONO: 5607707

DATOS DEL ASEGURADO / BENEFICIARIO

ASEGURADO / BENEFICIARIO: SECRETARIA DISTRITAL DEL HABITAT	IDENTIFICACIÓN NIT: 899.999.061-9
DIRECCIÓN: CL 52 NRO. 13 - 64 PISO 12	CIUDAD: BOGOTÁ, D.C., DISTRITO CAPITAL TELÉFONO 3581600
ADICIONAL:	



PAGINA WEB



CORRESPONSALES BANCARIOS



Pagos con convenio *No aplica para transferencias



Banco de Bogotá



Seguros del Estado S.A Cuenta Corriente 008465445



Grupo Bancolombia



Seguros del Estado S.A Cuenta Convenio 47189

VALOR PRIMA NETA \$ *****40,000.00	GASTOS EXPEDICIÓN \$ *****7,000.00	IVA \$ *****8,930.00	TOTAL A PAGAR \$ *****55,930.00	VALOR ASEGURADO TOTAL \$ *****4,657,828.80	PLAN DE PAGO CONTADO
INTERMEDIARIO			DISTRIBUCION COASEGURO		
NOMBRE	CLAVE	% DE PART.	NOMBRE COMPAÑIA	% PART.	VALOR ASEGURADO
ALIANZA MUTUAL DE SEGUROS AMS LTDA	164207	100.00			

QUEDA EXPRESAMENTE CONVENIDO QUE LAS OBLIGACIONES DE SEGUROS DEL ESTADO S.A. SE REFIERE UNICAMENTE AL OBJETO Y OBSERVACIONES DE LA(S) GARANTIA(S) QUE SE ESPECIFICAN EN ESTE CUADRO.

PARA EFECTOS DE NOTIFICACIONES LA DIRECCIÓN DE SEGUROS DEL ESTADO S.A. ES CRA. 7 NO. 57 -67 - TELEFONO: 2172417 - BOGOTÁ, D.C.

FORMA DE PAGO

BANCO	CHEQUE No.	VALOR

EFFECTIVO	
CHEQUE	
TOTAL \$	



(415) 7709998021167 (8020) 11002109928588 (3900) 000000055930 (96) 20211027

REFERENCIA
PAGO:

1100210992858-8

COPIA PARA PAGO EN BANCOS NO NEGOCIABLE



**SEGUROS
DEL
ESTADO S.A.**

NIT. 860.009.578-6

CONSTANCIA DE NO REVOCATORIA NI CANCELACION POR FALTA DE PAGO DE LA PRIMA

Hacemos constar, que la póliza N° 101122756, anexo 0, no expirara por falta de pago de la prima, ni por revocatoria unilateral del tomador de la póliza o de la aseguradora.

Lo anterior de conformidad con lo establecido en el decreto 1082 de 2015 el cual regula las garantías ante entidades estatales

Dado en BOGOTA, D.C. a los 28 días del mes de OCTUBRE de 2020

14-44-101122756

FIRMA AUTORIZADA: Manuel Sarmiento - Vicepresidente de Fianzas

ACTA DE INICIO

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario

CONTRATO U ORDEN No. 57318

INTERVINIENTES:

MILDRED CONSTANZA ACUÑA DIAZ
Subdirectora Administrativa. - Supervisor

RODOLFO ANTONIO ALBARRACIN MEDINA
Representante Legal UT SERTAL CCE TECNOLOGÍA

OBJETO:

ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA
SECRETARÍA DISTRITAL DEL HÁBITAT - MONITORES

VALOR:

VEINTITRÉS MILLONES DOSCIENTOS OCHENTA Y NUEVE
MIL CIENTO CUARENTA Y CUATRO PESOS M/CTE
(\$23.289.144,00).

PLAZO DE EJECUCIÓN:

Según Orden de Compra

FECHA DE INICIO:

noviembre 05 de 2020

FECHA DE TERMINACIÓN:

enero 04 de 2021

En Bogotá D.C., a los cinco (05) días del mes de noviembre de 2020, se reunieron en las instalaciones de la Secretaría Distrital del Hábitat, los abajo firmantes con el objeto de suscribir la presente acta y dar inicio con la ejecución de la Orden de Compra No 57318 de 2020.

Los riesgos amparados por la garantía única están vigentes, y los aspectos legales de la póliza son:

Número de la póliza: 14-44-101122756 Anexo 0

Entidad emisora: SEGUROS DEL ESTADO S.A.

Vigencia: 04/07/2021

Fecha de aprobación: 30/10/2020



Subsecretaría de Gestión Corporativa
Calle 52 No. 13-64 Piso 12°. 
Conmutador: 358 16 00 Ext. 1201
contratacion@habitatbogota.gov.co

Página 1 de 2

ACTA DE INICIO

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario

Informadas las orientaciones de ley sobre la normatividad que rige la Contratación Pública y demás explicaciones sobre el objeto del contrato, se firma por los intervinientes.



Mildred Constanza Acuña Diaz

C.C. No. 52695512

Subdirectora Administrativa

Supervisor

g



RODOLFO ANTONIO ALBARRACIN MEDINA

C.C. No. 7.217.866 de Bogotá D.C

Representante Legal UT SERTAL CCE TECNOLOGÍA

Gracias!

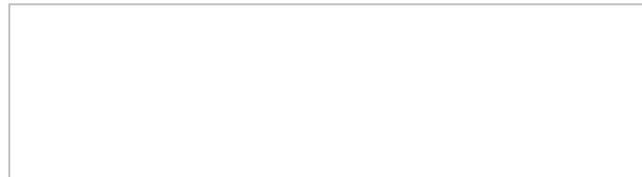
Felipe Albarracín

Comercial sector gobierno

Comercializadora Serle.com S.A.S

soporteserlecom@gmail.com

Celular 3125106917



COMERCIALIZADORA [SERLE.COM](https://www.serle.com) SAS

800089897-4

El jue, 26 nov 2020 a las 17:38, SOPORTE SERLECOM (<soporteserlecom@gmail.com>) escribió:

Buenas tardes Carlos,

Le comparto:

- AIO configurado especialmente para los requerimientos de la entidad (en el adjunto)
- Link monitor 27 pulgadas a entregar como accesorio <https://displaysolutions.samsung.com/monitor/detail/1420/C27R500>
- Link monitor 24 pulgadas a entregar como accesorio <https://www.samsung.com/mx/monitors/flat/led-monitor-with-borderless-design-24-inch-lf24t350fhlxzx/>

En cuanto a las alternativas de AIOs para entrega inmediata, no hemos identificado alguna que se ajuste en presupuesto y características a lo solicitado, por lo cual seguiremos adelante con la referencia de partida.

Quedo atento a su confirmación para proceder a agilizar el proceso

Gracias!

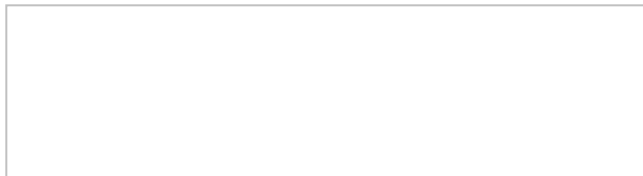
Felipe Albarracín

Comercial sector gobierno

Comercializadora Serle.com S.A.S

soporteserlecom@gmail.com

Celular 3125106917



COMERCIALIZADORA SERLE.COM SAS

800089897-4

----- Forwarded message -----

De: **SOPORTE SERLECOM** <soporteserlecom@gmail.com>

Date: mié, 21 oct 2020 a las 17:17

Subject: Re: URGENTE ORDEN DE COMPRA EVENTO 93354

To: Giohana Caterine Gonzalez Turizo <giohana.gonzalez@habitatbogota.gov.co>

Cordial saludo

Adjunto documentos solicitados por la entidad, adicionalmente envío fichas técnicas de los equipos ofertados para su respectiva aprobación. esto con el fin de proceder a tramitar la compra de estos ítems para agilizar la ejecución de la posible orden de compra el todo en uno cuenta con las siguientes características específicas

estaremos atentos a su respuesta y aprobación para proceder

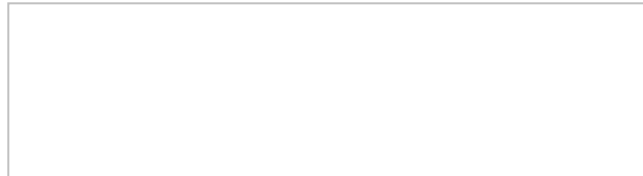
Felipe Albarracín

Comercial sector gobierno

Comercializadora Serle.com S.A.S

soporteserlecom@gmail.com

Celular 3125106917



COMERCIALIZADORA SERLE.COM SAS

800089897-4

El mié., 21 oct. 2020 a las 14:02, Giohana Caterine Gonzalez Turizo

(<giohana.gonzalez@habitatbogota.gov.co>) escribió:

Respetados señores,

UT SERTAL CCE TECNOLOGIA

A efectos de generar en el día de hoy la orden de compra del evento del asunto, agradecemos nos remitan antes de las 4:00 pm del día de hoy copia de la cámara de comercio de los integrantes y cedula del representante legal,

Este mensaje se remitió en el día de ayer por la plataforma, agradecemos su colaboración

Sin otro particular,

Giohana Caterine Gonzalez Turizo
Contratista
Subdirección Administrativa
Secretaría Distrital del Hábitat

24/12/2020

Correo: Julio Cesar Benavides Carranza - Outlook

Teléfono: (+57) 1 358 1600 -
Bogotá, Colombia

"Antes de imprimir este mensaje, compruebe que es necesario hacerlo. Una tonelada de papel implica la tala de 15 árboles y el consumo de 250 mil litros de agua. El medio ambiente es compromiso de TODOS. "



UT SERTAL CCE TECNOLOGÍA

Bogotá, 22 de diciembre de 2020

Señores
Secretaría del hábitat
Mildred Constanza Acuña Díaz
Carlos Andrés Barreto Guzman

Ref. Solicitud de ampliación plazo de ejecución Orden de Compra No. 57318

Señores,

Muy respetuosamente nos dirigimos a ustedes con el fin de solicitar la prórroga hasta el próximo viernes 5 de marzo para dar cumplimiento a la Orden de Compra No. 57318-2020 por valor de \$23,289,144.00, realizada el día 10 de octubre del presente año.

Esto, en la medida que, por razones ajenas a nuestro control, específicamente el desabastecimiento de insumos para la fabricación de los equipos solicitados debido a un incremento exponencial en la demanda de computadores de todos los tipos, ha sido un detonante crítico para el fabricante, hp, que conllevó al incumplimiento de las fechas inicialmente estipuladas. Como soporte a lo manifestado, adjunto enviamos la siguiente documentación:

1. Carta de hp justificando la situación actual directamente a CCE
2. Carta de hp dirigida a nosotros como distribuidor autorizado, manifestando la coyuntura que estamos afrontando
3. Correo de hp en donde especifican los nuevos tiempos de entrega estimados
4. Anexo de análisis de mercado realizado, en donde se evidencian el incremento en la demanda debido a la pandemia.
5. Anexo con noticias y reportajes que justifican la escasez de insumos en el sector de tecnología.

De nuestra parte ha existido toda la voluntad para poder ejecutar el evento en el plazo establecido por Colombia Compra Eficiente para el presente acuerdo marco. Por lo cual, las órdenes de compra a mayorista fueron efectuadas el día 11 de octubre del presente año, sólo un día después de ser adjudicatarios del evento.

Siendo así, y teniendo en cuenta lo anteriormente expuesto, respetuosamente solicitamos a la entidad otorgar el plazo ya mencionado, para poder ejecutar y entregar a satisfacción los elementos que se busca adquirir por medio de esta orden de compra.

Quedamos atentos a sus consideraciones, cualquier inquietud al respecto con gusto será atendida.

Cordialmente,



RODOLFO ANTONIO ALBARRACIN MEDINA
C.C. No. 7.217.866 de Bogotá D.C.
Representante Legal UT SERTAL CCE TECNOLOGÍA



HP Colombia S.A.S.
N.I.T. 900.824.185-5
Cl. 100 No. 7-25
Bogotá- Colombia
www.hp.com.co

Bogotá, D.C., 11 de noviembre de 2020

Señor
JOSE ANDRES O'MEARA
Director General
COLOMBIA COMPRA EFICIENTE
Ciudad

Referencia: Situación de Mercado/Escasez de Componentes

Respetado señor O'Meara:

Desde HP Colombia S.A.S. en calidad de subsidiaria de HP Inc. en Colombia, consideramos relevante que Colombia Compra Eficiente, como entidad rectora de la compra pública en Colombia conozca las distintas realidades y hechos sobrevinientes que ocurren en el mercado de tecnología y computación actual, que tienen la potencialidad de modificar de manera imprevisible los términos en los cuales se ha desarrollado la relación contractual entre el Estado y los particulares.

Consideramos importante que Colombia Compra Eficiente tenga conocimiento de la situación que viene ocurriendo dentro del mercado mundial de equipos tecnológicos, debido a las dificultades que en la actualidad están enfrentando los fabricantes de partes y componentes para abastecer la demanda de los distintos mercados, dado el importante aumento en la demanda de equipos tecnológicos resultante del incremento de actividades que como el Teletrabajo y la Educación Virtual vienen generando.

Si bien se han tomado medidas para mitigar esta situación y ampliar la oferta, la exponencial demanda de productos afecta la estabilización de respuesta por parte de fabricantes.

El mercado colombiano no escapa a esta realidad llevando a que las condiciones contractuales pactadas en muchos de los acuerdos de provisión de equipos de cómputo se puedan ver impactados en los términos convenidos por las empresas contratistas de manera muy generalizada.

Aprovechamos la oportunidad para dar visibilidad a la entidad de que estos hechos pueden impactar la ejecución de la contratación estatal relacionada a equipos de cómputo y periféricos, entre otras cosas, producto de que el teletrabajo y la educación virtual se siguen estimulando por los actores del mercado, situación que además se estima extender por varios meses más y en este sentido es relevante que CCE considere todo lo anterior frente a la estabilidad contractual de las entidades contratantes y las empresas contratistas a fin de sortear de la manera más equilibrada los perjuicios de las partes involucradas.

Quedamos atentos a cualquier inquietud o ampliación de la información que usted o su equipo de trabajo consideren necesario obtener sobre este tema.

Cordialmente,

Juan Daniel Mateo Figueroa
Representante Legal
HP Colombia S.A.S.

Santiago Barbosa Delgado

Sales Manager

Corporate, Enterprise & Public Sector

Diciembre 18, 2020



Referencia: Evento 93354 por CCE para la Secretaría Distrital del Habitat.

Para Comercializadora Serle Com SAS:

A medida que continuamos navegando tiempos sin precedentes, en HP seguimos firmemente enfocados en nuestros clientes, abordando rigurosamente y mitigando los cambiantes desafíos resultantes de la pandemia COVID-19.

Al principio de la pandemia, enfrentamos interrupciones en los procesos de fabricación y logística. Actualmente, estamos trabajando incansablemente para satisfacer la extraordinaria demanda por nuestros productos ideados para trabajar, aprender, enseñar y entretenerse desde casa. Continuamos trabajando en estrecha colaboración con nuestros proveedores de componentes y de servicio de envíos para agilizar la entrega de pedidos lo más rápido posible con el fin de satisfacer esta demanda, incluyendo el aumento de proveedores aprobados, el ajuste de nuestra producción, transporte y capacidad de entrega, pero la situación puede permanecer comprometida durante varios meses. En consecuencia, apreciamos su paciencia mientras trabajamos activamente para entregar sus pedidos.

El estado y los posibles retrasos en los pedidos y/o reparaciones de los clientes ya existentes, continúan reflejándose en los sistemas de HP y se actualizarán periódicamente, incluyendo notificaciones por correo electrónico al enviar el pedido o si este se retrasa.

Nuestro equipo le mantendrá regularmente informado de cualquier mejora en las fechas de entrega con el fin de planificar en conjunto la disponibilidad a tiempo de los productos. Su colaboración en anticiparnos futuros pedidos tan pronto como sea posible, nos ayudará con la planificación de la producción.

Seguimos monitoreando de cerca la situación y respondiendo en tiempo real las consultas y problemas de soporte de clientes y socios. Valoramos enormemente su negocio y apreciamos su paciencia.

Por favor, para cualquier pregunta sobre pedidos y/o reparaciones específicas utilice los canales tradicionales de HP.

Saludos,


Santiago Barbosa D (22 Dec. 2020 07:29 EST)

Santiago Barbosa Delgado

Sales Manager

Corporate, Enterprise & Public Sector


GM


CA



SOPORTE SERLECOM <soporteserlecom@gmail.com>

Secretaría Distrital del Habitat Evento 93354

1 mensaje

Morales, Gabriel <gabriel.morales-reyes@hp.com>

22 de diciembre de 2020, 8:51

Para: rodolfo albarracin <gerenciaserlecom@gmail.com>, SOPORTE SERLECOM <soporteserlecom@gmail.com>

Cc: "Vasquez Marin, Valeria (CW)" <valeria.vasquez.marin@hp.com>

Buenas tardes Señores de Comercializadora Serle Com SAS:

Les informamos que los equipos adquiridos en cumplimiento de la orden de la referencia tienen un retraso en su fabricación debido a un desabastecimiento en algunos de sus componentes ocasionados por la situación mundial del mercado (Ver carta adjunta).

Es decir que según la recuperación de sus partes y componentes esperamos poder entregar en 45 días en Miami al Mayorista para su posterior importación y nacionalización.

Seguiremos trabajando para agilizar la recuperación de estas partes. Les estaremos informando sobre cualquier avance.

Adicionalmente, les estamos adjuntando la Carta que radicamos a Colombia Compra Eficiente donde les informamos de la situación actual del mercado de cómputo. En los siguientes links también encontrarán información pública de la misma:

- <https://www.hd-tecnologia.com/en-el-resto-del-ano-tendremos-escasez-de-cpus-y-demas-hardware-de-pc/>
- <https://www.profesionalreview.com/2020/08/12/escasez-componentes-segunda-mitad-2020/>
- <https://www.voanoticias.com/tecnologia-ciencia/empleados-y-estudiantes-afrontan-escasez-de-computadoras-causada-por-la-pandemia>

Atentamente,

Gabriel Morales

Account Manager

Public Sector

gabriel.morales-reyes@hp.com

T +573153485020

HP Colombia

Cra 7 # 99-53

Bogotá

Colombia



2 adjuntos



CARTA REGION - SERLECOM - SDH - firmado.pdf
154K



CARTA CCE - Situación incremento de demanda.pdf
289K

ANEXO 1: ANÁLISIS DE CONDICIONES DE DEMANDA



Passport

THE IMPACT OF CORONAVIRUS ON CONSUMER ELECTRONICS

April 2020

Introduction

Economic Outlook

Industry Impact

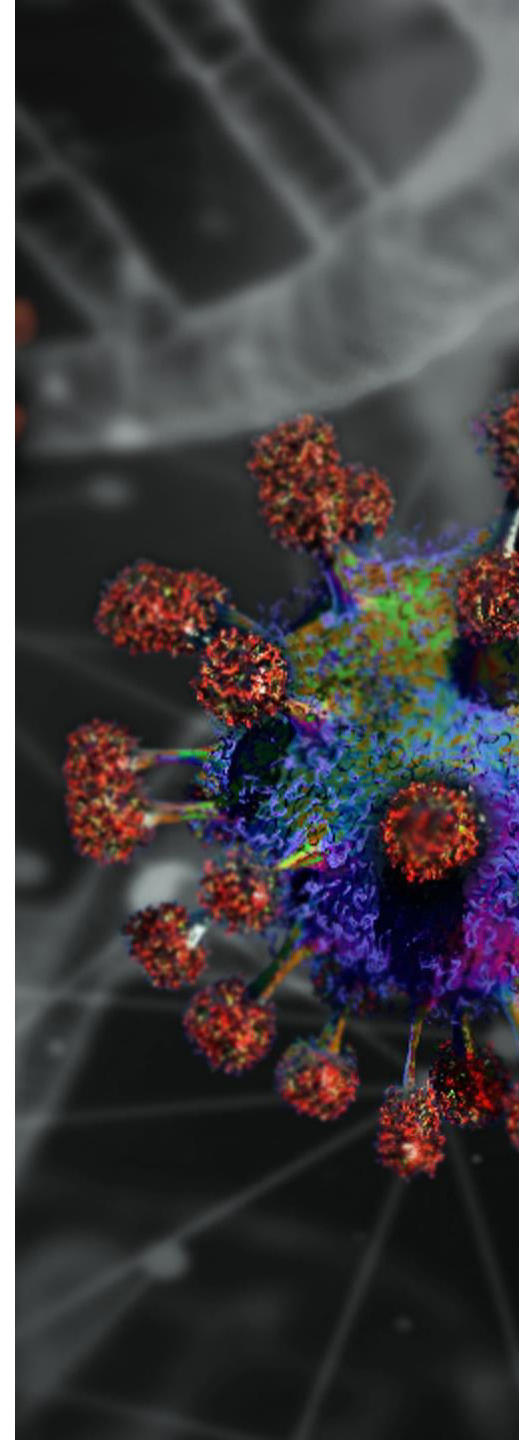
Geographic Impact

Corporate Response

Pricing Impact

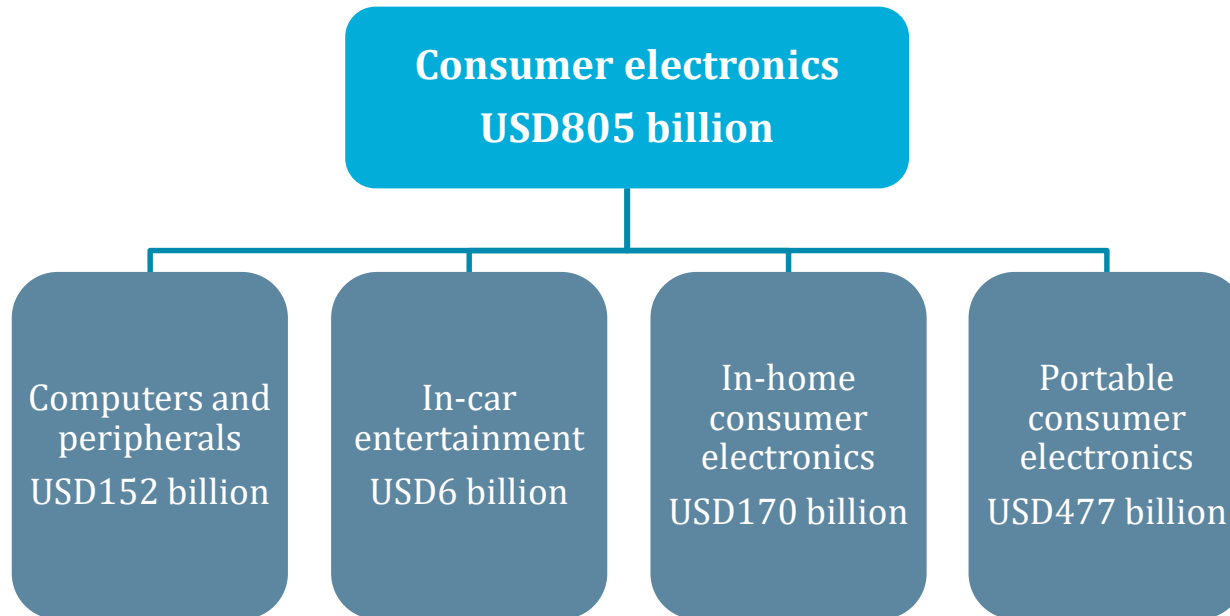
Conclusion

About Our Analytic Capabilities



Scope

- This reports reviews the wide-ranging impact of the pandemic on sales of consumer electronics in 2020.



Disclaimer

Much of the information in this briefing is of a statistical nature and, while every attempt has been made to ensure accuracy and reliability, Euromonitor International cannot be held responsible for omissions or errors.

Figures in tables and analyses are calculated from unrounded data and may not sum. Analyses found in the briefings may not totally reflect the companies' opinions, reader discretion is advised.

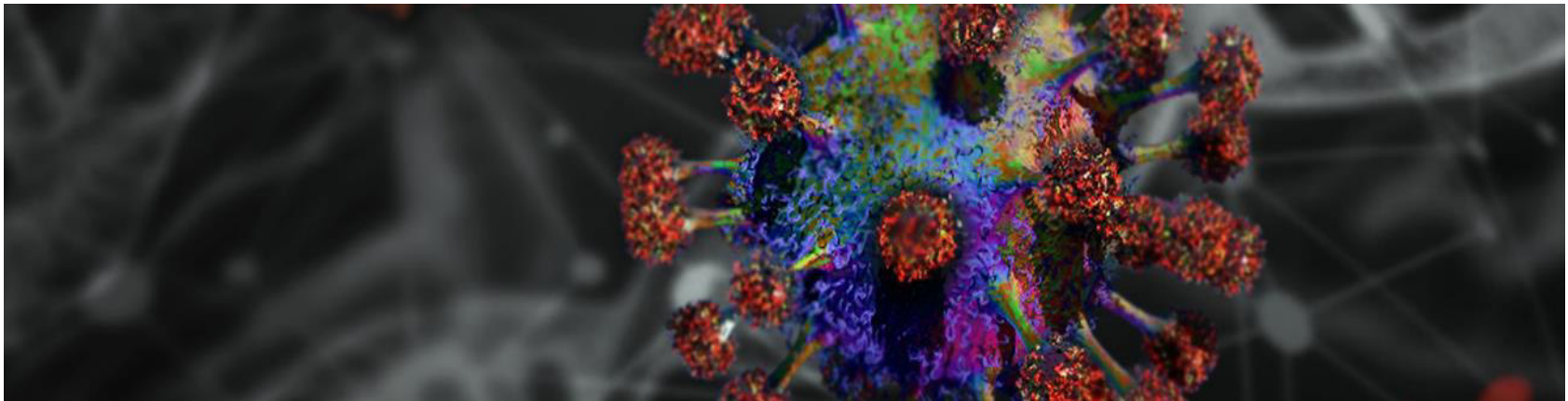
The coronavirus (COVID-19) pandemic has already had a wide-ranging impact on sales of consumer electronics and the industry's forecast outlook. Some categories like computers and peripherals have benefited as consumers are working from home, leading to more sales. With the pandemic having both an economic and psychological impact, consumers' sentiment will be severely dampened, with big-ticket items like televisions negatively impacted as a result.

COVID-19 impact: Key findings

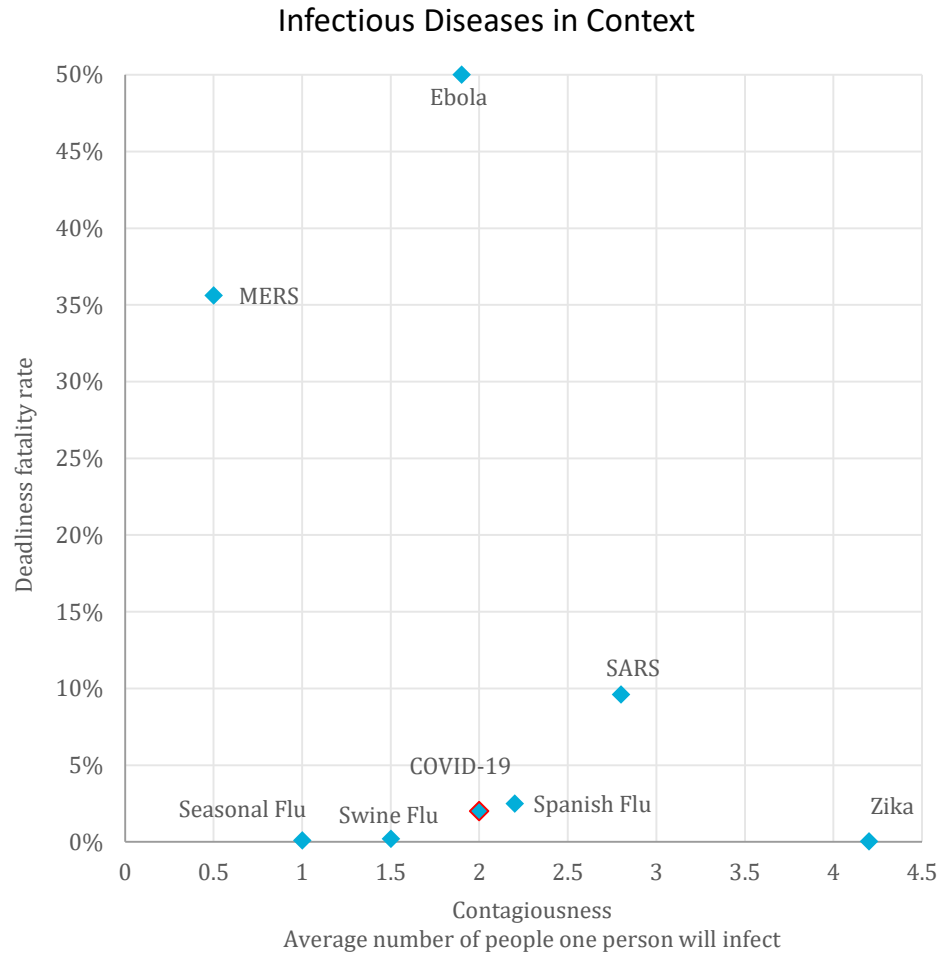
Productivity wins the day	Sales of computers and peripherals enjoyed a sudden spike in sales as consumers scrambled to purchase laptops, tablets, printers and monitors as offices and schools closed.
Shifting priorities is bad for sales of consumer electronics	With reduced disposable incomes and depressed consumer sentiment, consumers are choosing to buy necessities like food and cleaning products and avoiding non-essential, big-ticket purchases like LCD TVs.
Some companies will benefit from the crisis	As consumers cut down on discretionary purchases, brands like Xiaomi will benefit as the company's low-cost strategy will offer good value for money. Apple will not be severely impacted as the company has a loyal following of affluent fans.
Enjoyment is still important	Despite tightening of belts, consumers will still spend money on products they deem to be important (like smartphones) or ones that offer convenience and value for money (like wireless speakers).
Global supply disruption will not trigger a major up-cost for consumers	With most of the major production markets in lockdown, supplies of components and finished goods will be affected. However, with most electronic products being highly commoditised, consumers will not see any major cost hike.

Consumer electronics and coronavirus

- The global consumer electronics industry has seen significant shifts in recent years. Consumers were holding onto their products for longer and not replacing them, leading to longer replacement cycles. The silver lining was that those who upgraded were buying higher-end models, leading to stronger value sales growth compared to volume growth. The drive towards premium models was providing much needed relief to manufacturers and retailers' revenues, despite predicted lacklustre volume sales in the forecast period.
- As the COVID-19 pandemic swept the global economy, efforts to contain the spread of the virus saw a reduction in large gatherings, closure of schools and offices, and, in badly affected areas, lockdowns, where movements were severely restricted.
- With the majority of the population being confined to their homes, there has been a sudden spike in demand for computers and peripherals, due to e-learning and working from home. On the other hand, the economic impact of the pandemic has meant that consumers are putting off big-ticket purchases as they cut down on discretionary spending.



COVID-19 in context



Source: Centers for Disease Control, World Health Org, CIDRAP, studies

- Despite lower mortality rates than other recent epidemics, the impact of COVID-19 on the global economy and consumer markets has the potential to be significant for many reasons:
- Geographic spread, with transmission centres across most regions globally. The impact globally is also likely to be protracted, affecting different countries and regions at different times;
- Contagiousness, as COVID-19 is more transmissible than seasonal flu, for instance;
- The global economy was already weakened, many governments have limited room for manoeuvre fiscally (without incurring heavy debt) and in monetary policy, and the impact of these measures is not clear cut;
- The impact on China and therefore global supply chains has been severe;
- Currently, the seasonality of the virus is unclear, as is the number of unreported cases, meaning many uncertainties remain.

Introduction

Economic Outlook

Industry Impact

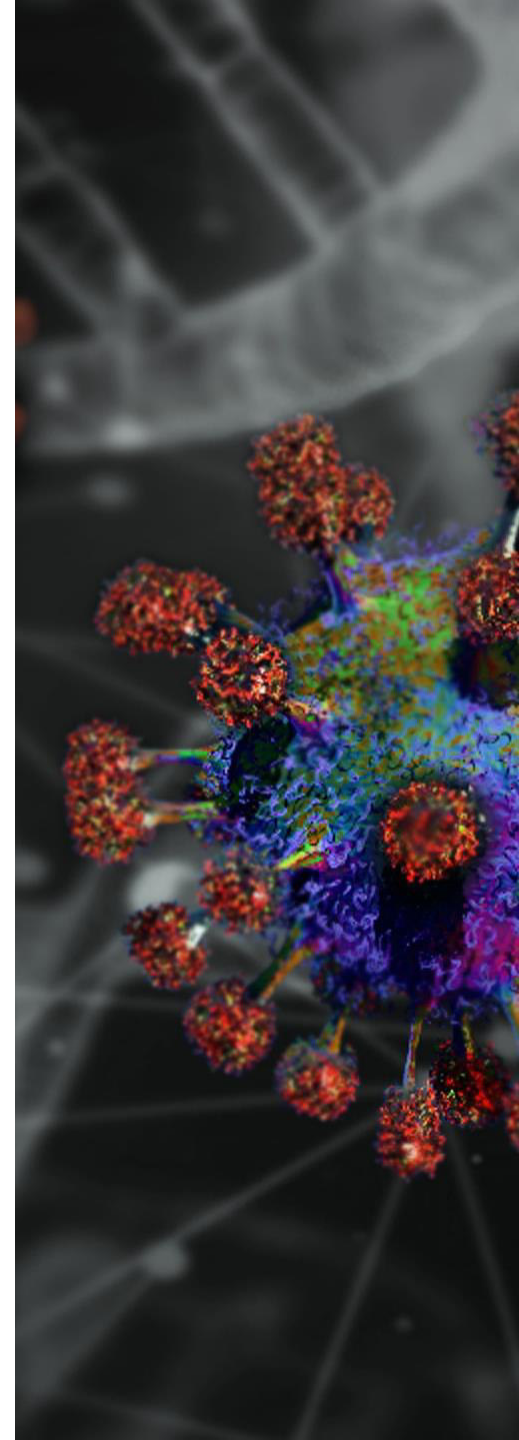
Geographic Impact

Corporate Response

Pricing Impact

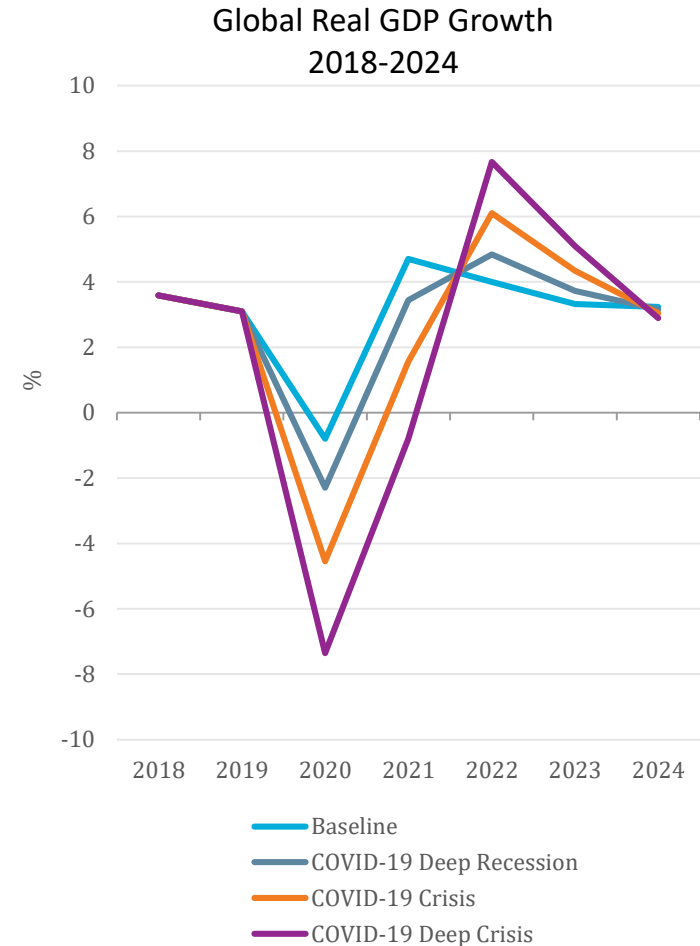
Conclusion

About Our Analytic Capabilities



Global GDP is likely to contract in 2020 under the baseline scenario

- The COVID-19 pandemic has forced governments to quarantine entire countries, disrupted global supply chains, slashed business and consumer confidence and affected financial markets. The effects on the global economy are already being felt, and will be substantial, but the exact magnitude will depend on the length of COVID-19 restrictions.
- COVID-19 will severely impact both the supply and demand sides of the economy. At the same time, monetary policy tools are almost exhausted due to the slow recovery from the Global Financial Crisis. Interest rates have not recovered, so central banks have to resort to Quantitative Easing programmes (QEs), but QEs have limited effect on labour markets, consumer spending and other aspects of the real economy.
- Thus, countries have to turn to fiscal stimulus. However, the response to fiscal stimulus will be limited too as long as people are quarantined in their homes. In the meantime, governments are helping businesses and citizens by providing emergency loans to cover expenses and lower the spillover effects through economies, but uncertainty surrounding the pandemic limits economic activity.
- Our baseline forecast for global real economic growth in 2020 is in the -1.5 to 0.5% range, placing it in the bottom three growth rates for all years since 1961.



Source: Euromonitor International Macro Model

The COVID-19 pandemic impacts both supply and demand

How is the virus being contained?



- Testing and tracing of people who have come into contact with the sick person in order to prevent community transmission.
- Closure of public areas (cafés, restaurants, shopping centres, gyms, cinemas, etc) and large-scale events (Tokyo Olympics have been postponed).
- Quarantine: People have to stay home, and non-essential travel is prohibited. International flights are cancelled as countries close their borders.

How is demand affected?



- Individuals are stockpiling essential goods and turning to online purchases with delivery or streaming services.
- Social distancing measures are lowering consumption demand by limiting spending on leisure and entertainment services.
- Uncertainty about the future makes consumers more cautious about discretionary purchases.
- Consumers are wary of setting up travel plans due to uncertainty about the end of quarantine across countries.

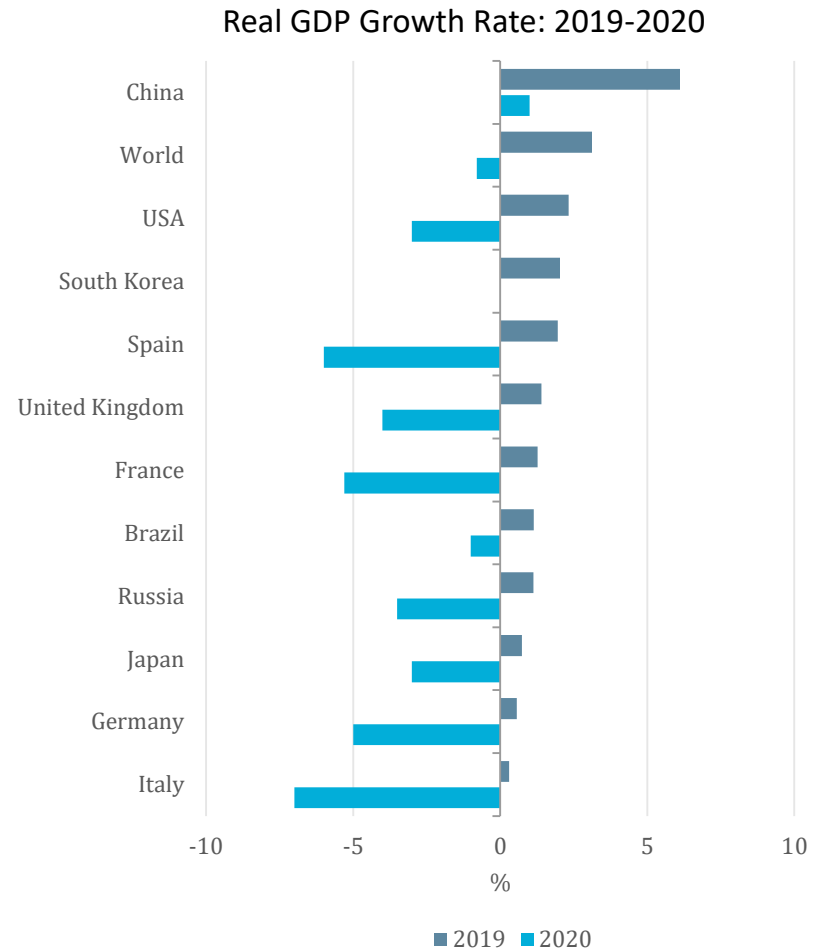
How is supply affected?



- Supply chain disruptions arise due to global interconnectivity of industries.
- Factories are being temporarily closed all over the world (eg most of the carmakers are closing factories in Europe and the US).
- Uncertainty over the length of the restrictions limits productivity investments.
- Stockpiling by consumers leads to shortages of essentials, medical products and pharmaceuticals sold through retailers.

In our baseline view, the pandemic peaks in June 2020

- Under our baseline forecast scenario, the COVID-19 pandemic peaks in late May/early June. Following on from this, restrictions to contain the virus are relaxed, and the economy rebounds.
- In total, around 1-10% of the global population gets infected, although not all are tested and confirmed.
- The mortality rate for the virus averages 0.8% globally. Most healthcare systems around the world cope relatively well with the virus and do not get overloaded, with only a handful of exceptions, as social distancing measures help relieve the pressure.
- Fiscal policies effectively support aggregate demand by saving businesses with emergency loans and temporarily increasing unemployment benefits.
- The economic upheaval induced by restrictions to contain COVID-19 do not spill over to a large number of bankruptcies, limiting the length and depth of the recession in most countries. Financial crisis is similarly avoided. Therefore, once restrictions are lifted, economies quickly rebound.



Source: Euromonitor International Macro Model, National Statistics

Three scenarios examine the impact of a more severe outbreak

COVID-19 Deep Recession: Global GDP growth of -3.5% to -1.5% in 2020

- In this scenario, the pandemic lasts until June/July 2020, during which time around 15% of the global population is infected.
- The healthcare sector is overloaded only in a few regions and the mortality rate remains close to 1.0%. We estimate the mortality from all infected people, not only from confirmed cases.
- Global supply chains become disrupted and cashflow mismatches lead to a rise in bankruptcies.
- However, the number of bankruptcies is contained by significant government policies.

COVID-19 Crisis: Global GDP growth of -5.5% to -3.5% in 2020

- In this scenario, the pandemic slows down in the summer but returns in September. Nevertheless, it is relatively contained by around November.
- In total, up to 25% of the global population is infected but not all of them are tested. The mortality rate rises compared to a less severe scenario and reaches around 1.5% as a significant portion of hospitals becomes overcrowded and healthcare systems struggle to cope, leaving some patients without the treatment they need.
- A significant portion of businesses go bankrupt.

COVID-19 Deep Crisis: Global GDP growth of -9.0% to -5.5% in 2020

- In this most extreme scenario, the pandemic returns with larger presence in the autumn and lasts until spring 2021.
- More than one third of the global population gets the virus, and healthcare systems across some countries completely collapse: hospitals cannot admit most of the patients and the mortality rate rises to around 2.5% globally.
- Fiscal and Monetary stimulus packages are inadequate, and a significant number of businesses go bankrupt, leading to a skyrocketing of the unemployment rate around the world.

Our view in short

	Global infection rate	Mortality rate	Pandemic duration	Stock prices decline by	Private vs Government interest rate spreads rise by	Probability	Global real GDP growth in 2020
Baseline	1-10%	0.3-1.3%	1-2 quarters	Rebound by 0-30% in H2 2020	Around current level	40-50%	[-1.5%, 0.5%]
COVID-19 Deep Recession	5-25%	0.5-1.5%	1-3 quarters	10-30%	1-2 percentage points	20-30%	[-3.5%, -1.5%]
COVID-19 Crisis	15-35%	1.0-3.0%	2-4 quarters	25-45%	2-4 percentage points	15-25%	[-5.5% , -3.5%]
COVID-19 Deep Crisis	20-50%	1.5-3.5%	2-6 quarters	30-70%	3-6 percentage points	2-10%	[-9.0%, -5.5%]

Source: Euromonitor International

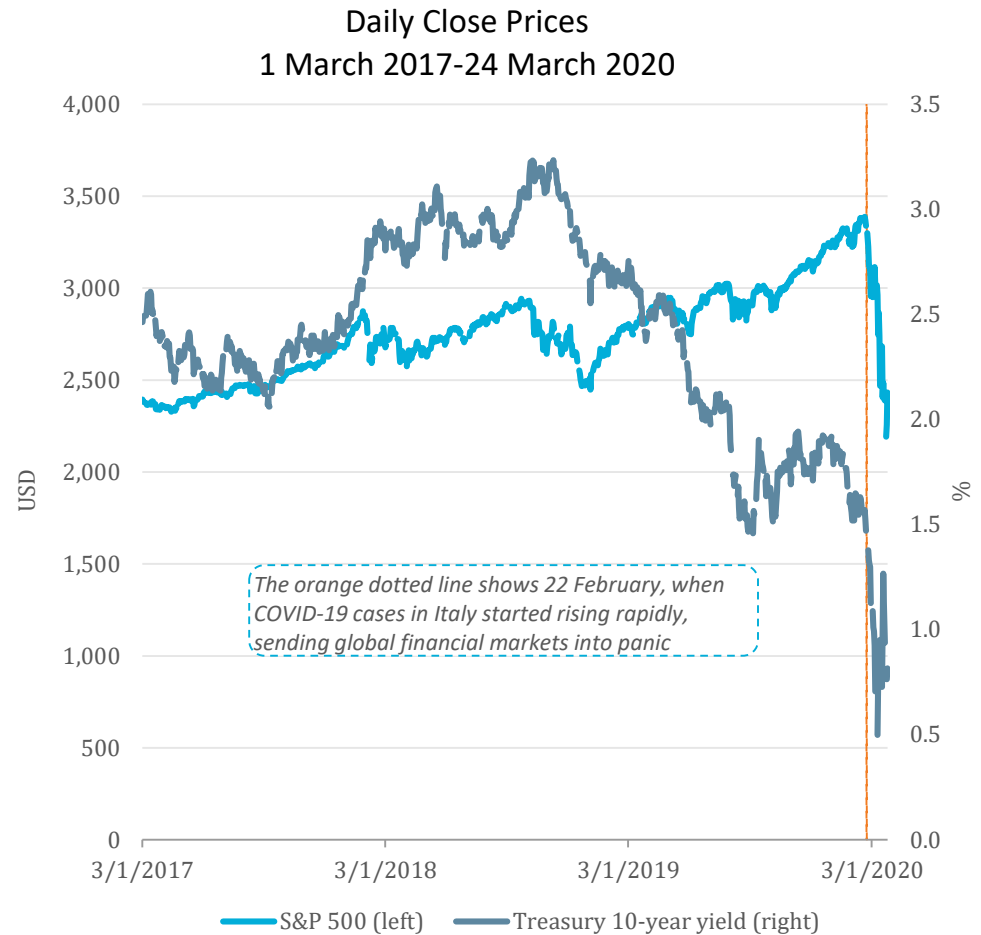
Forecasts for Real GDP growth in 2020 under different scenarios

Country	Baseline	Change in Baseline since January 2020	COVID-19 Deep Recession	COVID-19 Crisis	COVID-19 Deep Crisis	Real GDP growth in 2009 (the worst year of the Global Financial Crisis)
China	1.0%	-4.8%	-0.4%	-2.6%	-5.4%	9.2%
US	-3.0%	-4.7%	-4.1%	-5.8%	-7.9%	-2.5%
South Korea	0.0%	-2.0%	-1.8%	-4.5%	-7.9%	0.8%
Japan	-3.0%	-3.6%	-4.5%	-6.6%	-9.4%	-5.4%
Italy	-7.0%	-7.4%	-8.7%	-11.2%	-14.3%	-5.3%
Germany	-5.0%	-5.7%	-6.3%	-8.2%	-10.6%	-5.7%
France	-5.3%	-6.4%	-6.4%	-8.1%	-10.3%	-2.9%
UK	-4.0%	-5.1%	-5.2%	-6.9%	-9.2%	-4.2%
Spain	-6.0%	-7.5%	-7.6%	-9.9%	-12.9%	-3.8%
Russia	-3.5%	-5.2%	-5.2%	-7.8%	-11.0%	-7.8%
Brazil	-1.0%	-3.1%	-2.7%	-5.3%	-8.6%	-0.1%

Source: Euromonitor International Macro Model and National Statistics

Financial markets on risk-off mode as COVID-19 entered Italy

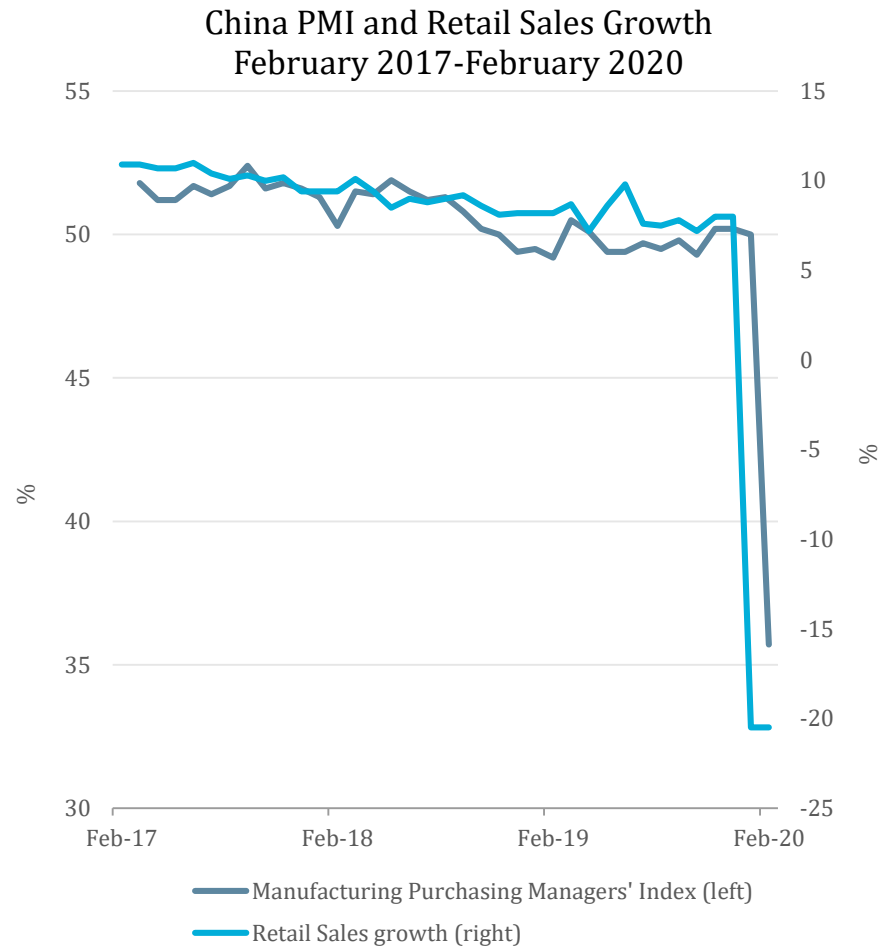
- Data from financial markets provides two-fold insights: it leads real economy indicators such as GDP growth and shows liquidity or difficulty for companies to raise cash to cover their short-term needs.
- As COVID-19 cases hit Italy, financial markets around the world went into risk-off mode, with a significant spike in volatility. VIX index futures, which are sometimes called “Fear Index”, skyrocketed from around 15 at the beginning of February to more than 60 in late March.
- S&P 500 index prices fell by 27.1% from 21 February to 24 March this year, while in the same period, Treasury yields fell by 65.5 basis points, as investors turned to safer assets.
- The uncertainty surrounding the spread of the virus, as well as fiscal and monetary stimulus that countries will implement, will keep the volatility in financial markets elevated at least until the summer.



Source: Yahoo! Finance

China: An early glimpse into the economic cost of the virus

- As China was the first economy where COVID-19 hit and the government introduced strict measures, data from the country give an early glimpse into what is to come in other severely affected regions.
- The COVID-19 pandemic started in China in late November 2019. It began rapidly spreading in January and February 2020, forcing the Chinese government to implement strict quarantine measures, which severely affected the economy.
- Manufacturing Purchasing Managers' Index data showed a significant drop from 50.0% in January 2020 to 35.7% in February 2020. Values below 50% in the index indicate that manufacturing activity in the economy is contracting.
- Retail sales in China contracted by 20.5% in the first two months of 2020 compared to the same period in 2019 in nominal terms. Most retail outlets were closed in the country, with only grocery and other essential stores open, which caused a dramatic decline in activity.

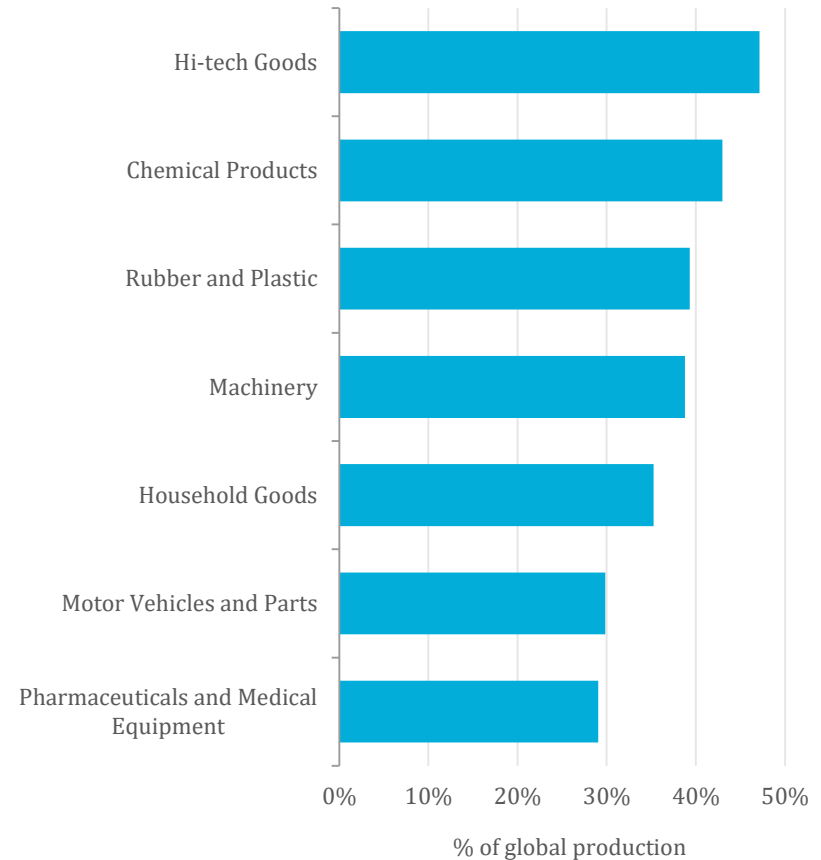


Source: National Bureau of Statistics of China

COVID-19 highlights need for supply chain diversification

- Global manufacturing supply chains were extremely effective and streamlined before COVID-19 hit the world. But the pandemic has exposed the vulnerability of the system in which components are manufactured by one major country, with no global alternatives to switch to quickly.
- The supply chain disruption started in China, when numerous factories across industries were shut down and restrictions on transportation were imposed. The first to feel the effects were global manufacturers of hi-tech goods, chemicals, machinery and automotive producers.
- Now China is restarting its economy; however Europe and North America are shutting down some of their factories to fight the spread of COVID-19. This will result in further disruptions to industries and an overall slowdown in manufacturing.
- There is no doubt manufacturers around the globe will have to rethink their supply and logistics strategies. We expect to see more diversification in supply chains, with more emphasis on having alternative suppliers.

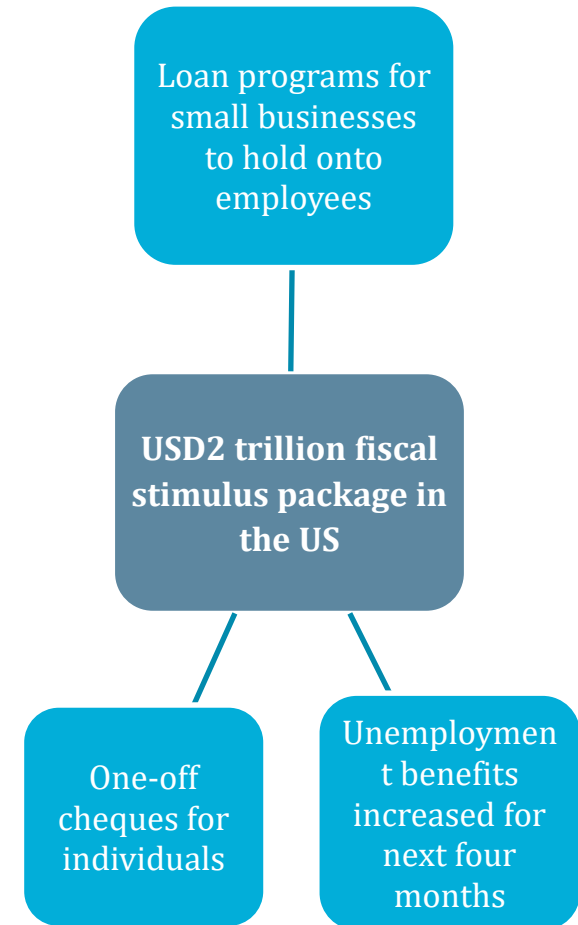
China's Share of Global Production in Selected Industries 2019



Source: Euromonitor International from National Statistics

Fiscal stimulus a challenge with restrictions on expenditure

- Governments around the world have started announcing their stimulus packages to aid economic recovery. However, the exact size of the response globally remains in constant flux.
- Given a novel global supply and demand shock, it is not currently clear how economies will react to fiscal or monetary stimulus. In light of the pandemic, people will not increase their demand for many items and services, and companies cannot produce more when people are isolated in their homes. It is important that governments around the world provide safety nets for individuals and companies in the form of delaying payment of taxes, insurance for people losing their jobs, etc.
- Another potential issue for the global economy is liquidity constraints on company debts. For example, shale oil industry debts or sky-high student loans in the US or corporate debts in Asia. The problem is that while recovery from the national disaster could be swift once the pandemic is over, the lack of liquidity in the system could trigger larger and longer lasting economic shocks when companies default.
- The response from governments will likely be unprecedented. The US will send cheques directly to individuals to help them cover shortfalls as part of its USD2.0 trillion proposed stimulus package. The UK will make GBP330 billion available to companies needing emergency loans, France has allocated EUR300 billion to businesses in a similar situation.



What could alleviate the economic effects of the pandemic?

A coordinated global response limits the spread of the virus. Advanced economies help emerging economies with their response and this limits the spread and length of the pandemic.

Effective treatment, widespread testing and a vaccine help to curtail the pandemic. The vaccine provides certainty that the virus will not return at pandemic levels, which gives people security. The economy quickly rebounds.

Fiscal and monetary policy stimulus helps companies and consumers stay afloat and supports demand through uncertain times. Once the pandemic passes, the economy quickly and fully rebounds because no financial crisis with a considerable number of defaults and bankruptcies was triggered.

It becomes evident that **COVID-19 cannot survive in higher temperatures**, leading to a significant slowdown of the pandemic in warmer months. Countries are able to safely remove the severe quarantine measures before the summer, which leads to economic recovery. The virus does not return at a similar presence for a second wave in autumn 2020.

What could exacerbate the economic impact of the pandemic?

Declining private sector income and sentiment, lower employment and tightening credit conditions cause **declining consumption and investment**. Lack of investment in infrastructure lower the potential economic growth.

Current short-term travel bans grow out into **long-term protectionist policies** and decoupling gets an additional boost – global trade declines and remains low in the long-term future too.

High-debt companies (eg shale industry in the US) cannot roll over debts due to a slowdown in business, which gives rise to **bankruptcies, triggering a financial crisis**.

The pandemic lasts longer and infects more people than in the baseline forecasts. Social-distancing measures have little impact to curtail the spread of the virus.

Cashflow mismatches between business costs and revenues cause business liquidity problems and a rise in bankruptcies.

Introduction

Economic Outlook

Industry Impact

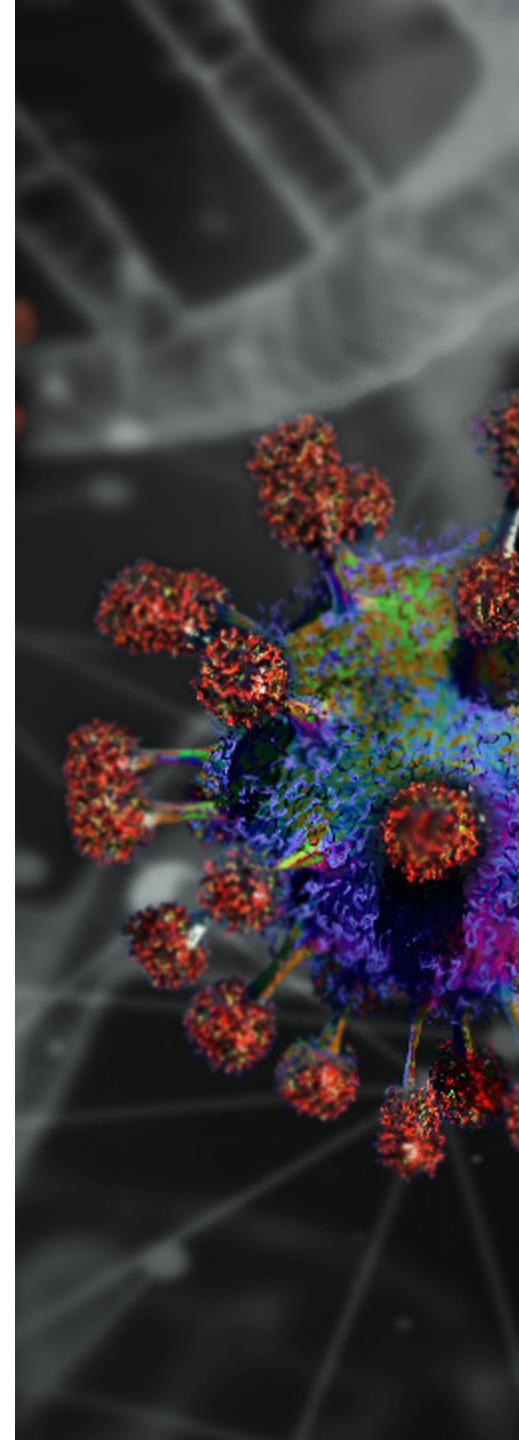
Geographic Impact

Corporate Response

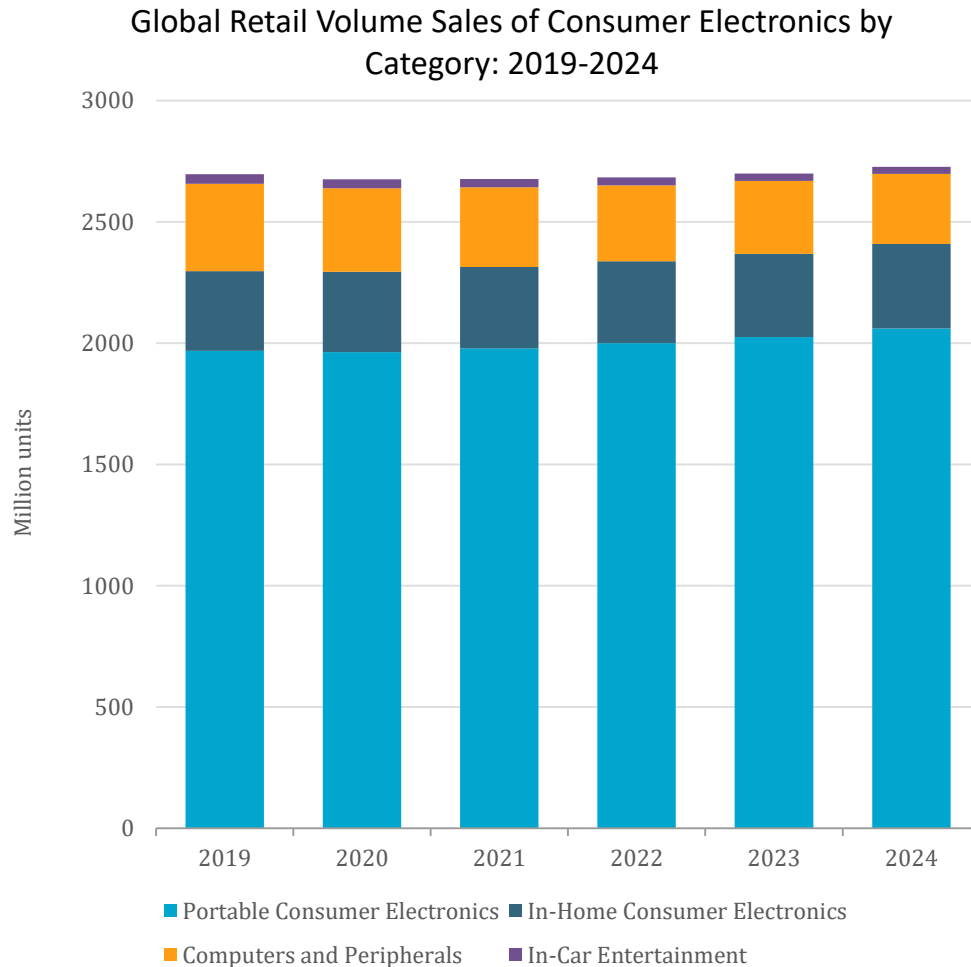
Pricing Impact

Conclusion

About Our Analytic Capabilities



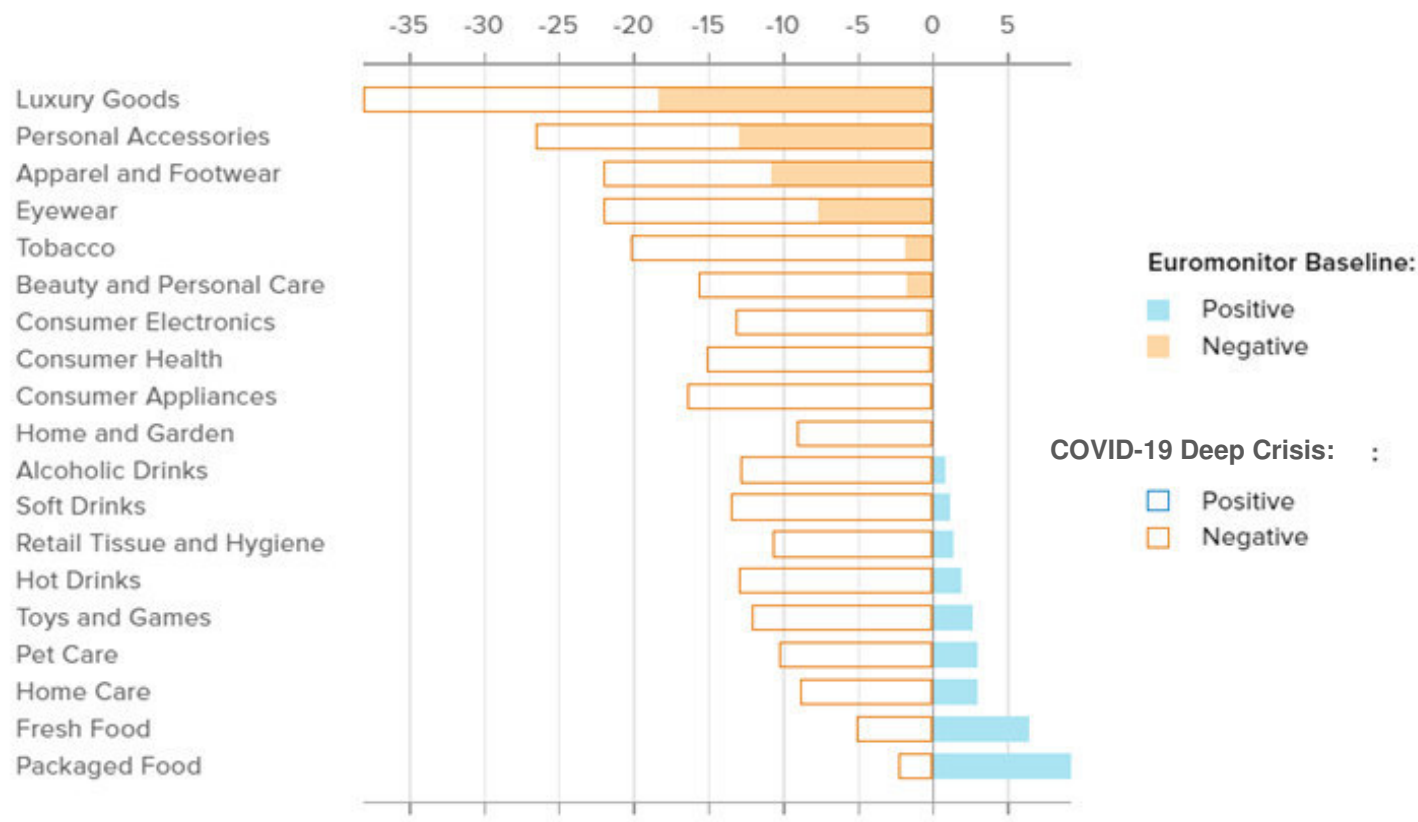
Computers and peripherals will benefit from the lockdown



- The baseline market forecast for consumer electronics was researched in early 2019 and data was published on Passport in July 2019. As such, the data and analysis have not taken account the impact of COVID-19 in 2020 into account.
- With many countries implementing stay-at-home notices or even lockdowns, there is increased demand for laptops and tablets, especially for students who need to continue with their studies via online programs.
- Working adults are spending their own money on printers and monitors to help increase their productivity, although for some, their companies are helping to fund the purchases, either partially or in full.
- Prior to the pandemic, sales of computers and peripherals were projected to decline over the forecast period.

Consumers cutting down on discretionary purchases during crisis

World COVID-19 Deep Crisis Scenario Forecast: Estimated Probability 2-10%
 Industry Level Retail Sales 2019-2020, % growth, 2019 constant prices, fixed year exchange rate



Source: Industry estimates

COVID-19 impact at a glance (1)

Impact by Category: 2020

	Immediate spike in growth followed by normalisation	Immediate spike in growth followed by long-term shift	No impact	Immediate drop followed by normalisation	Immediate drop followed by long-term shift
Desktops	X				
Laptops	X				
Tablets	X				
Monitors	X				
Printers	X				

- The shift towards working from home for most working professionals and the closure of schools for students triggered unprecedented demand for computers and peripherals.
- Some online courses required installation of flash, which is no longer supported by mobile devices. The smaller screen on mobile devices and even laptops also pushed up demand for monitors.
- Low-income families with schoolchildren are burdened with more financial pressure to buy computers for them. Previously, the children could share a computer, but with online classes, each child needs access to their own computer. Critically, the bread winners in low-income families are also facing salary cuts and unemployment. The additional cost of buying a computer has simply compounded their financial woes.

COVID-19 impact at a glance (2)

Impact by Category: 2020

	Immediate spike in growth followed by normalisation	Immediate spike in growth followed by long-term shift	No impact	Immediate drop followed by normalisation	Immediate drop followed by long-term shift
In-car entertainment					X
Home audio and cinema			X		
LCD TVs				X	
OLED TVs				X	
Video players			X	X	

- As consumers' incomes become negatively impacted by the COVID-19 pandemic, the immediate reaction is to cut down on discretionary purchases. The greatest impact will be felt on vehicle purchases and in-car entertainment upgrades. Consumers may delay purchasing new vehicles, leading to a need to upgrade or repair in-car entertainment systems on existing cars. Nonetheless, the category is forecast to continue its downward decline. The same downward trend also applies to the fast declining video players category. There is very low demand for video players on the whole.
- Although consumers are staying at home more, the economic uncertainty has meant that they are reluctant to buy big-ticket items like new televisions or home audio and cinema as they would rather save money for a later date.

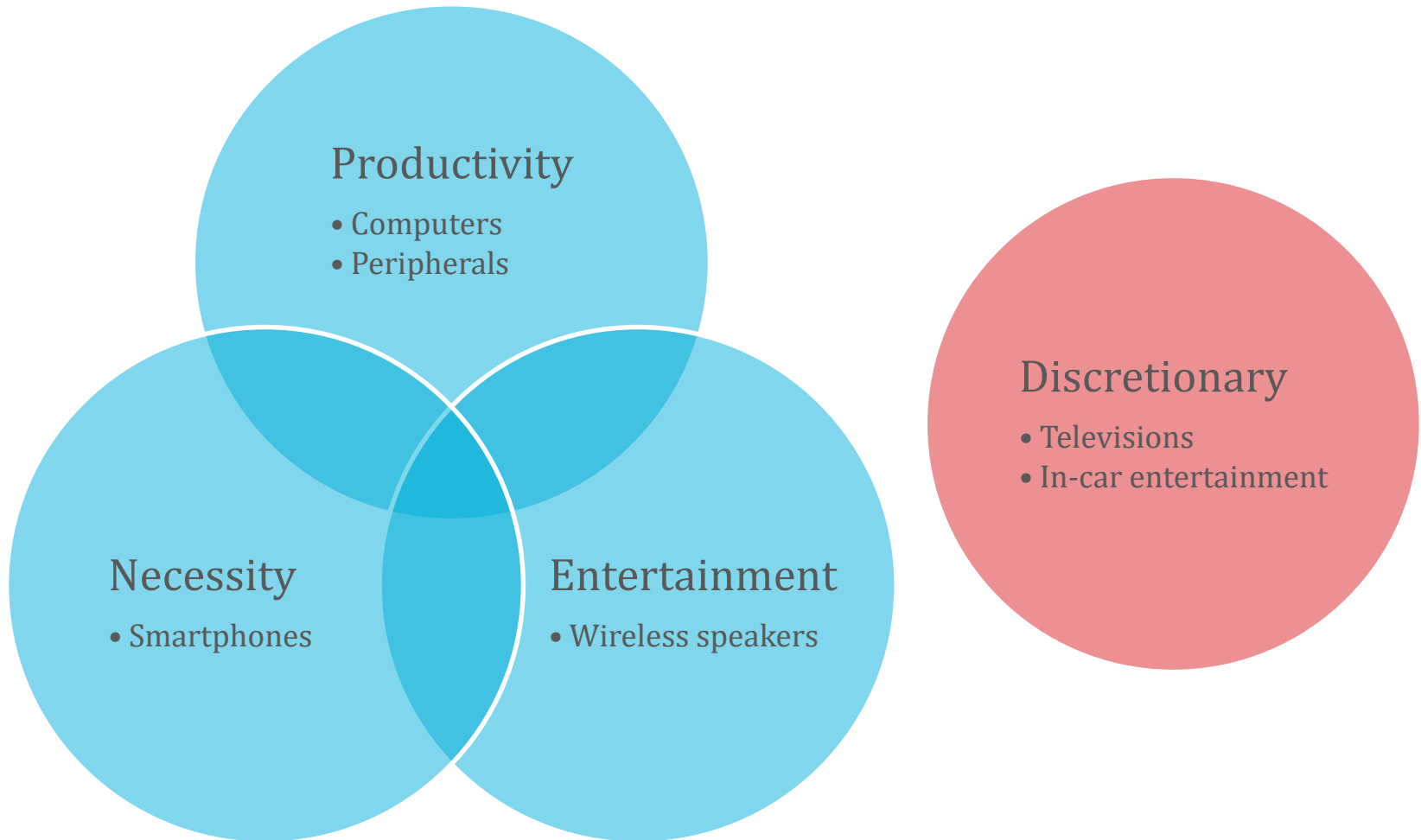
COVID-19 impact at a glance (3)

Impact by Category: 2020

	Immediate spike in growth followed by normalisation	Immediate spike in growth followed by long-term shift	No impact	Immediate drop followed by normalisation	Immediate drop followed by long-term shift
Imaging devices			X		
Feature phones			X		
Smartphones				X	
E-readers	X				
Portable media players			X		
Wireless speakers		X			
Activity wearables		X			
Smart wearables		X			

- Sales of imaging devices and feature phones will continue to see a downward spiral, and the pandemic has no bearing on this outcome. While smartphone sales will be slightly impacted, smartphones have become a necessity, and demand will prove to be resilient against the virus.
- With more people home bound, wireless speakers will be a cheap way to access entertainment. As consumers become more accustomed to having smart speakers, we expect even stronger demand moving forward. The pandemic also showed the importance of good health and has spurred an increase in sales of wearables. As consumers become more exposed to wearables and the continued trend towards healthy living, sales of wearables are projected to be even higher over the forecast period.

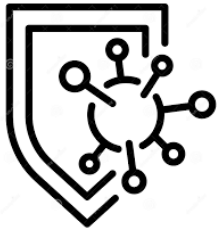
Impact of COVID-19 can be broadly categorised into four groupings



Routes to disruption

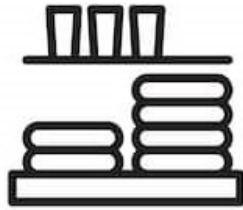
	Short-term impact (Q1-2)	Medium-term impact (Q3-4)	Long-term impact (2021 onwards)
Macro-environment + Legislation	Closure of businesses, schools, foodservice, and hospitality redirects consumption at-home	Disposable incomes depressed and consumer' sentiment dampened	Recovery
Supply Chain	Lockdowns in China, the material, component and manufacturing hub, disrupts supply of goods	Manufacturing adapts and production facilities redirected to higher-value products as companies look to grow their revenues in light of depressed sales	None
Channel	Consumers turn to e-commerce but many retailers are not e-commerce ready Sales are captured by established e-tailers like Amazon	Smaller companies start to jump onto e-commerce bandwagon and grow their online presence	Companies will continue their digital transformation and divert more resources to growing their e-commerce businesses
Consumer + Consumption	Sudden surge in demand for computers and peripherals due to working from home and school closures	Boredom leads to stronger sales of products that offer entertainment at low cost, like online streaming and wireless speakers	Return to normal consumption, but a shift towards e-commerce

The five-step consumer progression of COVID-19



Focus on preventative health

- Immunity-boosting H&W items
- Hygiene products (sanitisers/masks)
- Vitamins and dietary supplements (vitamin C)
- Disinfectants (wipes)



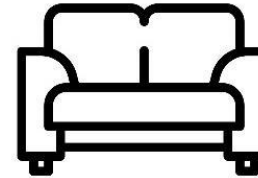
Stockpiling grocery essentials

- Sanitisers, liquid soap, toilet roll, bottled water
- Dried (pasta), canned/preserved, long-life (UHT milk) and preserved food, isotonic/functional beverages
- Baking ingredients (flour, yeast)
- Online sales surge



Avoidance of non-essential shops and services

- Foodservice closed
- International travel restricted
- Shopping centres, gyms, leisure centres, theme parks, etc, closed



Home seclusion

- Virtual living via virtual gyms/online gaming and socialising
- Home schooling (educational toys/books)
- Online shopping, home delivery and streaming
- Wider take-up of technology by older consumers
- Cocooning – DIY, gardening, home as wellbeing hub



A new normal?

- Globalisation knocked, return of local supply
- Premiumisation subdued
- Health paramount
- Mental wellbeing at forefront
- Strengthening of online
- Consumer re-set: city living diminished
- Sustainability shifts focus from anti-plastic to rewilding

Introduction

Economic Outlook

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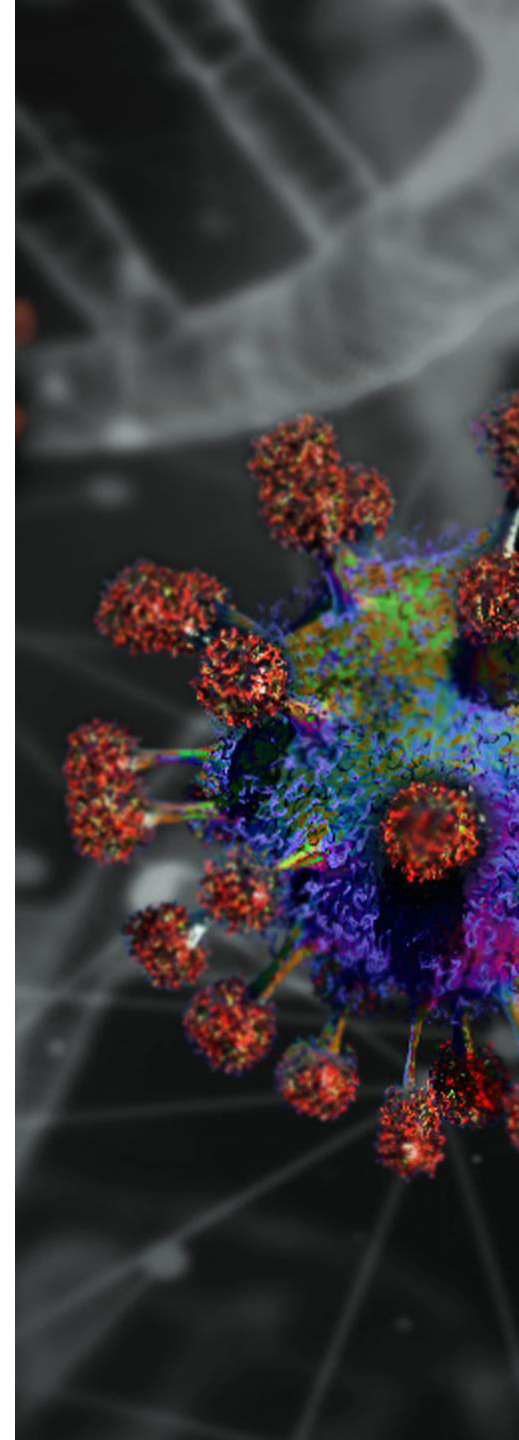
Geographic Impact

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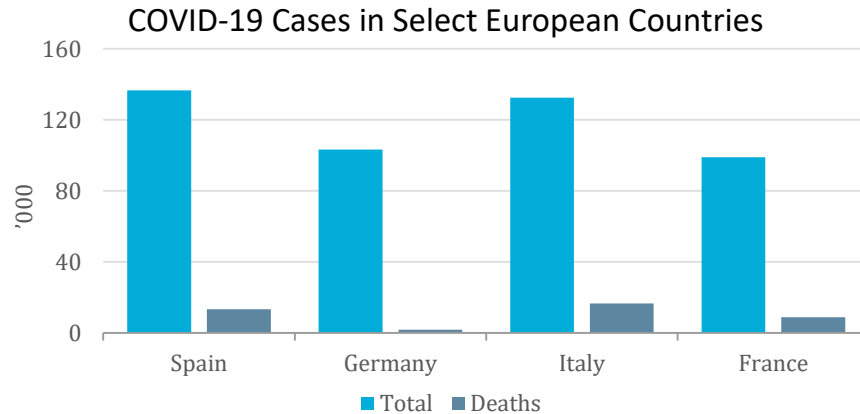
Pricing Impact

Conclusion

About Our Analytic Capabilities

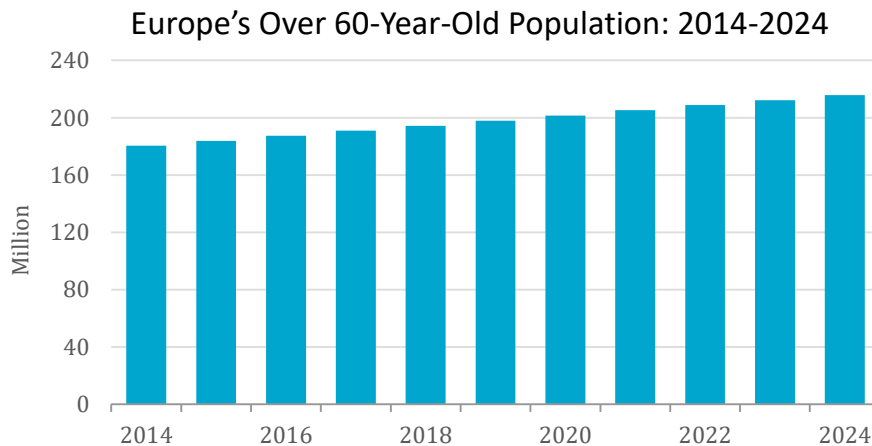


Europe: A psychological blow dealt to the continent



Source: Euromonitor International

Note: As of 6 April 2020



Source: Euromonitor International

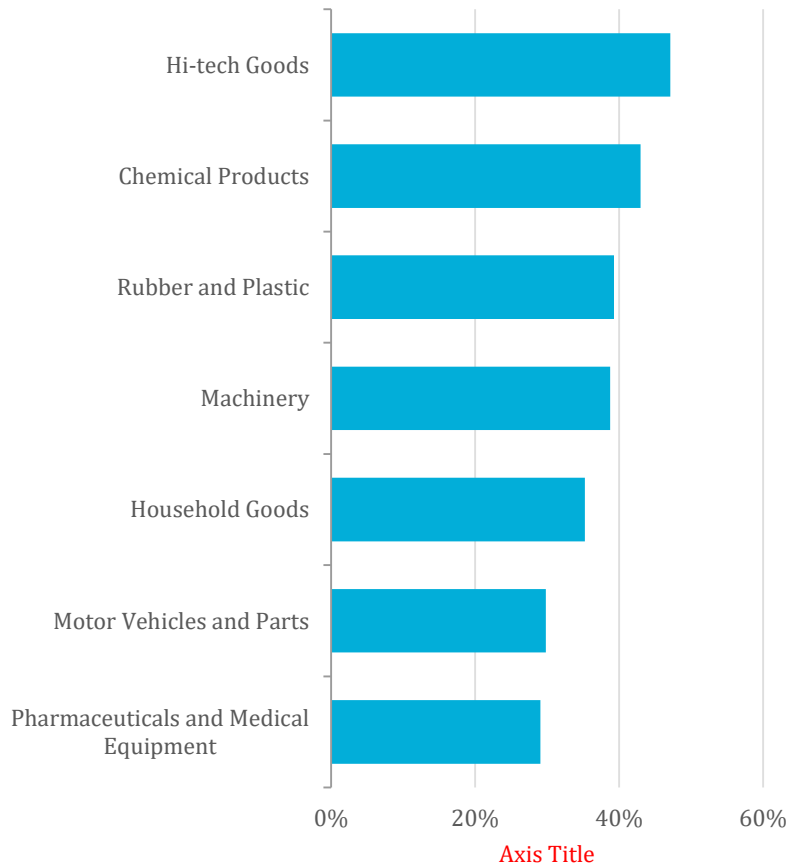
- Europe, especially Western Europe, is a developed region, and its citizens tend to enjoy much higher standards of living compared to consumers in emerging markets. Hence, it was alarming to see relatively high fatality rates when the pandemic hit Europe. As of 6 April, Italy's fatality rate stood at 12% of all COVID-19 cases, Spain's was 10%, and France's was 9%.
- The onslaught of new cases has severely stressed these countries' medical systems, leading to high fatality rates. Europe also has a proportionally high elderly population, which has further driven its fatality rates upwards.
- The high number of new cases and high fatality rates have also dealt a psychological blow to consumers' confidence in their governments and weakened consumer spending. Moving forward, sales of discretionary products like televisions are projected to be negatively affected as consumers in Europe choose to tighten their purse strings and spend on food and other essential products and services.

Latin America: Local production to be affected

- The arrival of the COVID-19 virus in Latin America has had a detrimental impact on economies in the region. The oil price war has further compounded the region's woes as businesses have been affected and consumer sentiment dampened.
- Brazil's currency hit a historical 25-year new low after reporting its first confirmed case. Amid growing concerns over US job losses and the Mexican government's poor response to the virus, the Mexican economy was also badly affected.
- China's lockdown also affected supplies of raw materials and components into the region. Companies set up assembly plants in the region to avoid incurring high import duties for electronics products from China. The Brazilian Association of the Electrical and Electronics Industry (Abinee) reported that 70% of manufacturers based in Brazil are struggling with supplies.
- Fear reigned as consumers refused to purchase products from China and even Western Europe, further depressing sales of consumer electronics products. The devaluation of currencies against the US dollar will also push up costs and the price of products, whether in terms of local produced consumer electronics or imported goods. Sales of second hand consumer electronics goods will enjoy a revival as consumers turn towards them as they look towards cash liquidity.
- All is not bad news in Latin America as the lockdown and movement restrictions are accelerating the digital transformation of companies. The region will start to see a strong push towards online sales as companies look to navigate and find new business opportunities. Consumers will also become more accustomed to and more receptive of e-commerce. Sales of e-commerce in the region accounted for only 15% of total consumer electronics volume sales in 2019.
- The pandemic has not really penetrated the region yet, but moving forward, the situation is expected to worsen, depressing sales of consumer electronics in 2020 and possibly 2021.

China: Light at the end of the tunnel

China's Share of Global Production in Selected Industries: 2019



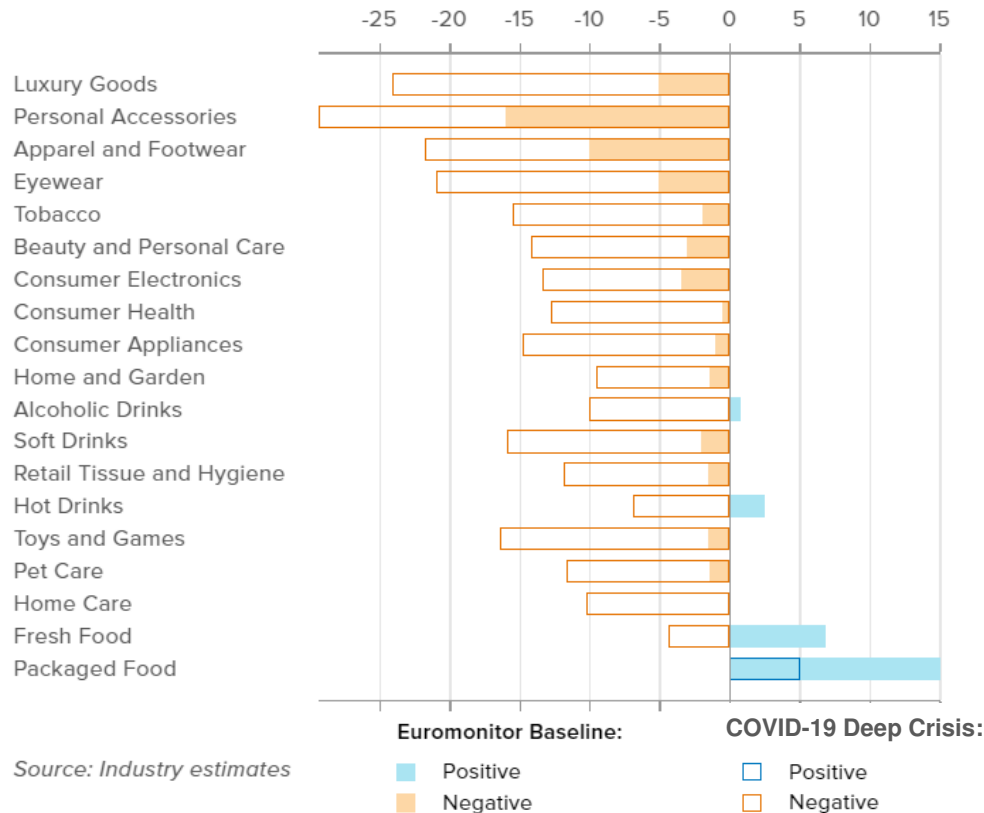
Source: Euromonitor International

- China was the first country to be hit with the pandemic, and the Chinese government resorted to extreme measures in an attempt to contain the virus. The epicentre, Hubei province, was placed under complete lockdown, and as the virus spread, tight lockdown was also enforced in other regions.
- China is already way ahead of many markets in e-commerce, with Chinese consumers purchasing 46% of consumer electronics via e-commerce in 2019. With nowhere to go, Chinese consumers are spending even more on e-commerce in 2020.
- The lockdown, while effective, disrupted supplies of raw materials, components and finished consumers electronics products to the global market. Brazil and India, with increasingly large local production operations, were badly impacted.
- While China has started to ease the lockdown, with domestic flights resuming, life for businesses and consumers is far from normal, and the already fragile Chinese economy will be further impacted. Retailers have started to aggressively promote interest-free instalments for consumer electronics products in a bid to revive dampened consumer sentiment.

Japan: 8K Olympics dream shattered

Japan COVID-19 Deep Crisis Scenario Forecast: Estimated Probability
2-10%

Industry Level Retail Sales 2019-2020, % growth, 2019 constant prices,
fixed year exchange rate

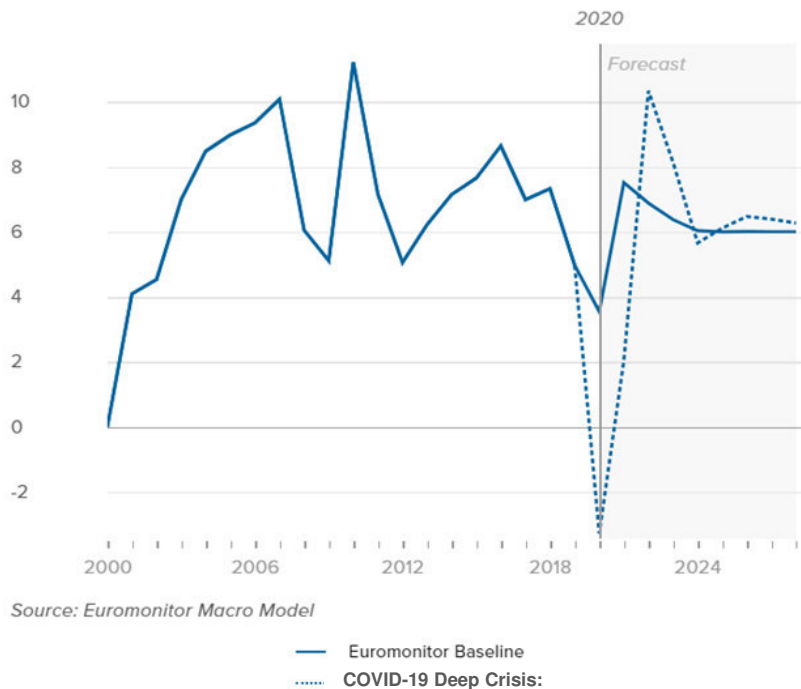


- The virus was another blow to the already weakened Japanese economy, hampered by a sales tax increase in October 2019. The Olympics were meant to kickstart the lacklustre economy.
- Broadcasters were planning to transmit both the Olympics and Paralympics in 8K resolution, and manufacturers wanted to use the high-profile event to showcase 8K resolution and drive television sales.
- There has been a slight increase in sales of computers and peripherals as companies allow employees to work from home. However, the government is unable to force companies to implement work-from-home rules, and employees are reluctant to do so, as, culturally, face-to-face contact is important in business.

Other Asia Pacific: China casting a shadow over the region

India COVID-19 Deep Crisis Scenario Forecast: Estimated
Probability 2-10%
Real GDP Growth: 2000-2028, % growth

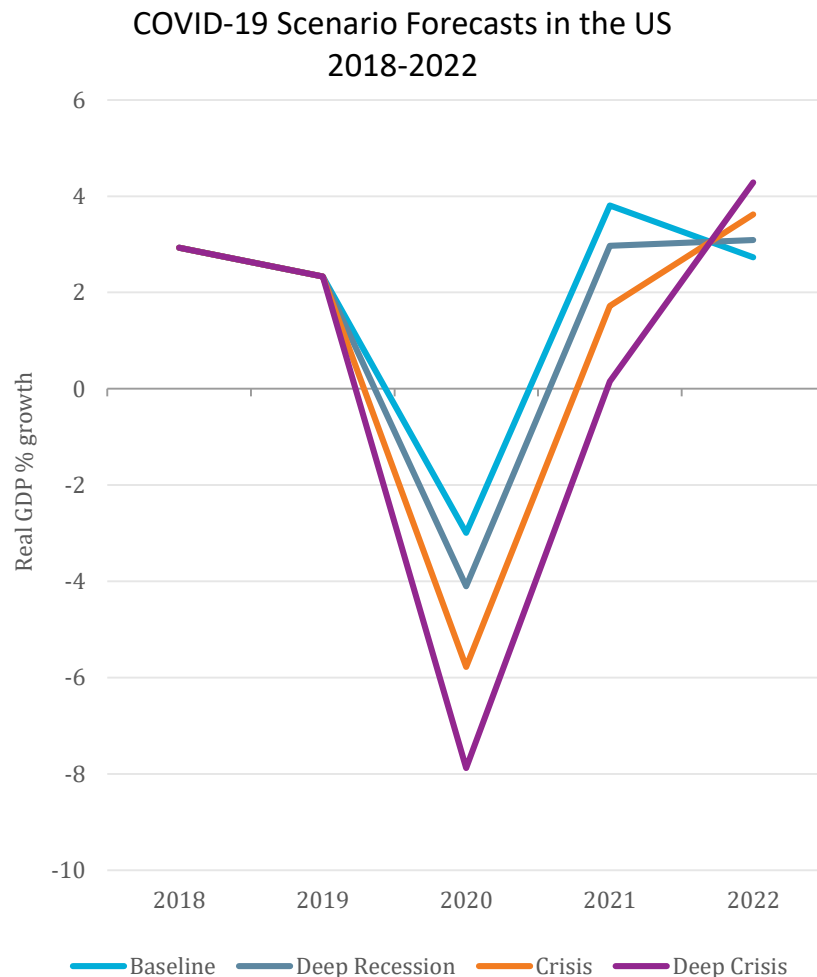
Latest Real GDP value (2019): 4.97



Last updated on April 16, 2020 at 8:59AM GMT

- India imposed high import duties on consumer electronics goods coming into the subcontinent, leading to manufacturers setting up local assembly facilities to cater to the booming Indian domestic market. The lockdown in China hampered India's factories as almost all components and semi-finished goods were imported from China, much like in Brazil.
- In Indonesia, most manufacturers have local production for appliances and televisions, but most consumer electronics sold in Indonesia are imported. However, poor healthcare and lowered average incomes, as COVID-19 hits the archipelago, will dampen consumer sentiment and growth in Indonesia's consumer electronics sales.
- South Korea was badly affected by COVID-19 early in 2020, but its situation is improving. It has its own strong domestic production capabilities, especially in display panels and chipsets, and the factory shutdowns impacted supplies. Critically, the financial impact affecting the chaebols of LG and Samsung will have a negative impact psychologically on consumer spending.

The US: Trouble in the world's largest economy



- The world's largest economy's financial health has a huge effect on the global economy. China and the US are two of the largest markets for consumer electronics.
- The US and China are at different stages of COVID-19 development. China has started to loosen up on its lockdown, whereas the US is implementing further restrictions across states.
- Much like China, the US has a strong and robust e-commerce landscape, dominated by companies like Amazon. The strength of US e-commerce has helped to mitigate the drop in sales in physical stores as consumers stayed at home and shops closed.
- What is worrying for the US is that its numbers of infected COVID-19 cases are still rising fast to reach 366,614 cases as of 6 April. The upside is that the total number of deaths is 3% of total cases, which is significantly lower than Spain or Italy.
- The trade war between the US and China in 2019 had dragged down both economies, and the virus will further dampen consumer confidence, thereby affecting sales of consumer electronics.

Introduction

Economic Outlook

Industry Impact

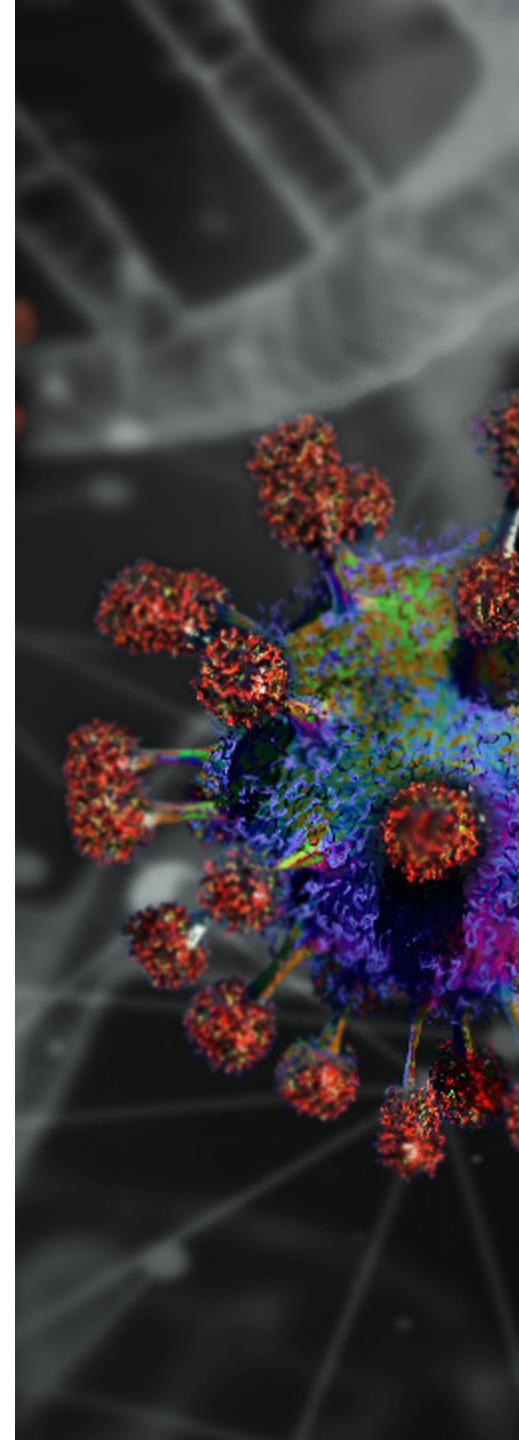
Geographic Impact

Corporate Response

Pricing Impact

Conclusion

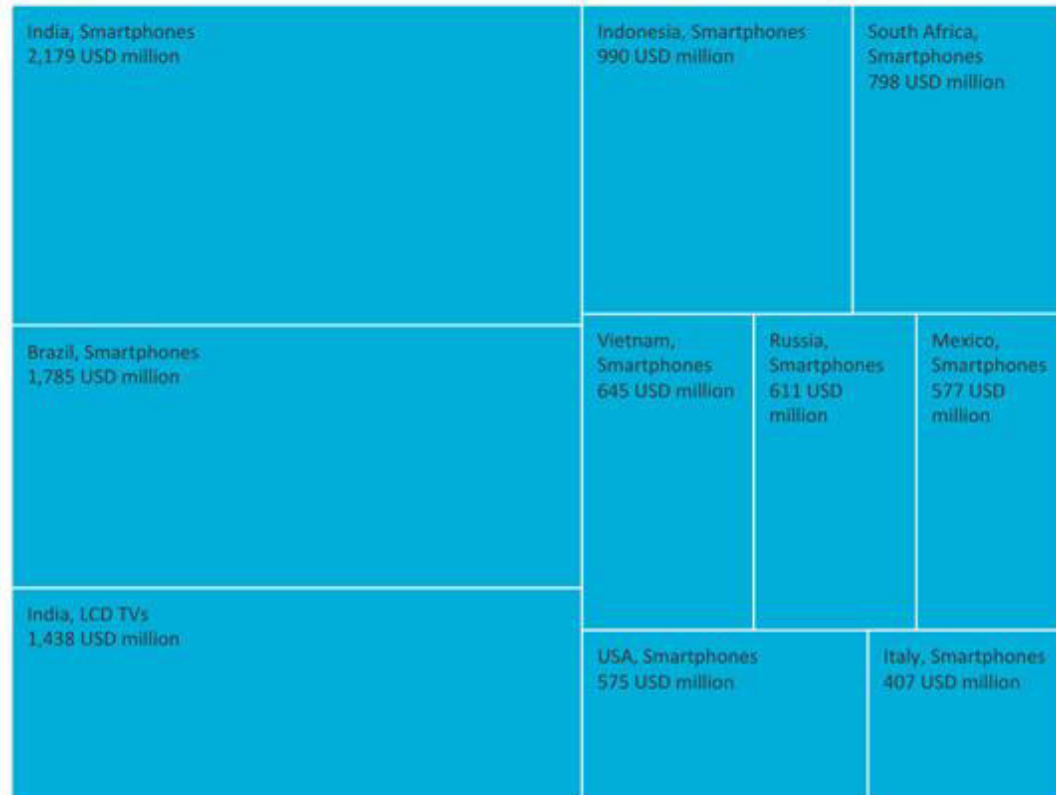
About Our Analytic Capabilities



Samsung: The pandemic will not stop its transformation

Samsung Corp: Top 10 Growth Areas, 2019-2022

Company Retail Sales RSP - USD million - Current - Fixed 2019 Exchange Rates



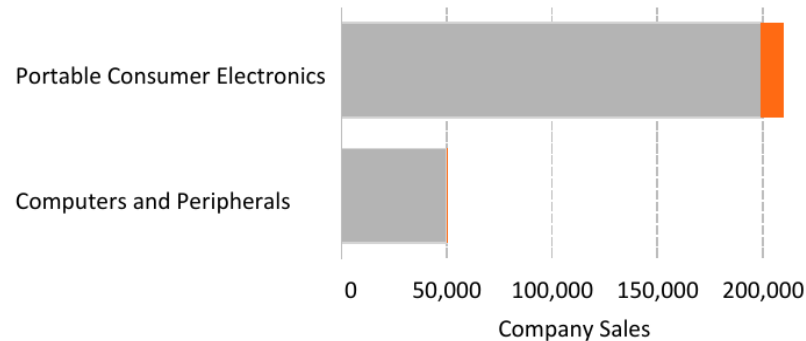
Note: Absolute projected sales represent the net increase/decrease in annual sales between 2019 and 2022. See appendix for methodology on projected company sales.

- Emerging markets like India and Brazil were projected to be Samsung's key growth markets before the pandemic.
- With the pandemic hitting these markets, Samsung will be badly impacted as consumers tighten their spending and avoid discretionary purchases.
- Consumers in these markets tend to be price sensitive and they are spoilt for low-cost alternatives.
- Samsung has the financial muscle to engage in price wars if the company chooses to defend its market share, and it will do so in critical markets like India and Brazil.
- Nonetheless Samsung is expected to continue its transformation towards premium models offering higher profit margins.

Apple: Smaller impact as its customer base tends to be affluent

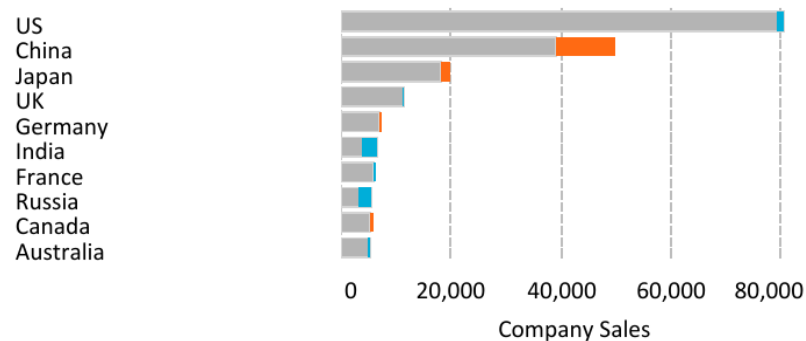
Top Categories, 2019

Retail Volume '000 units (Historic Period: 2016-2019)



Top Countries, 2019

Retail Volume '000 units (Historic Period: 2016-2019)



Absolute Historic Period Growth

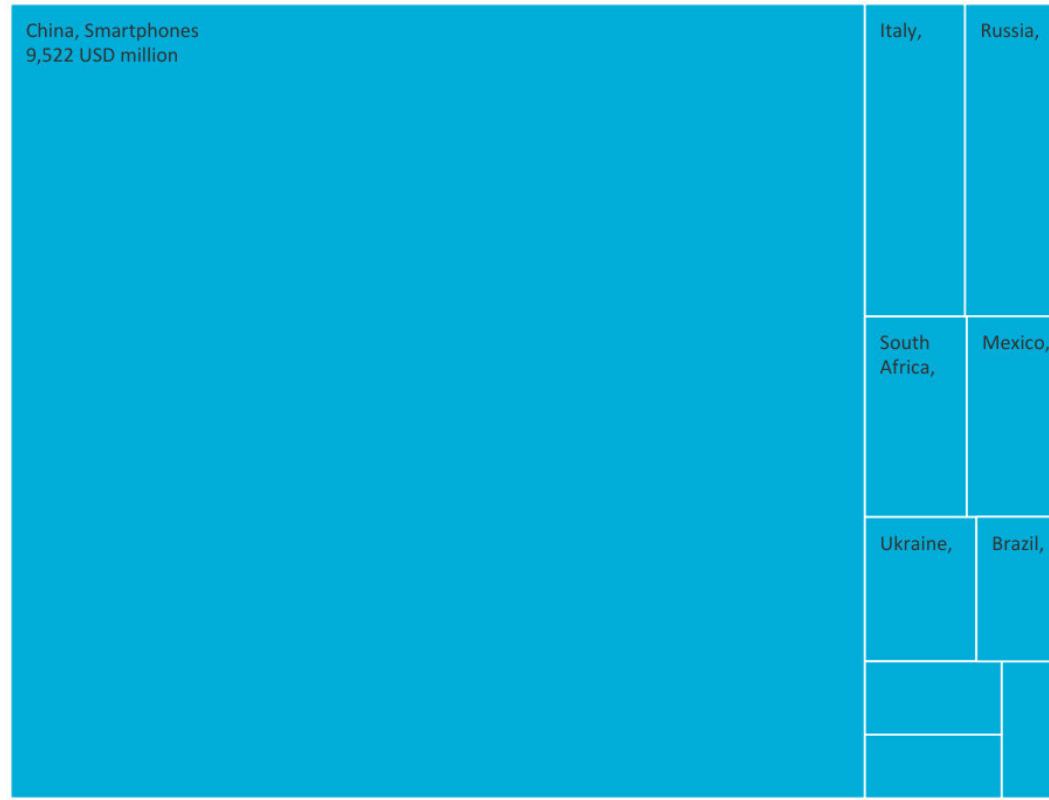


- Apple has always positioned itself as a lifestyle and premium brand and has never resorted to price wars just to grab market share.
- Apple's products are priced higher and attract a customer base that tends to be more affluent and willing to pay more for a cohesive user experience.
- As such, Apple's key markets tend to be largely centred on developed markets and the growing middle class in emerging markets. These consumers are less susceptible to any economic changes, and even when affected, their income levels are still significantly higher than the average household. These diehard fans will not easily switch to another brand.
- iPhone users tend to consume and, therefore, spend more on data and services, and telecommunication companies are willing to subsidise iPhone purchases when their subscribers sign up to high-value data plans.
- More importantly for the company, its dogged focus on offering a cohesive experience blend of products and services will help cushion any drop in hardware sales.

Huawei: Tough times for Chinese giant

Huawei Technologies Co Ltd: Top 10 Growth Areas, 2019-2022

Company Retail Sales RSP - USD million - Current - Fixed 2019 Exchange Rates USD million



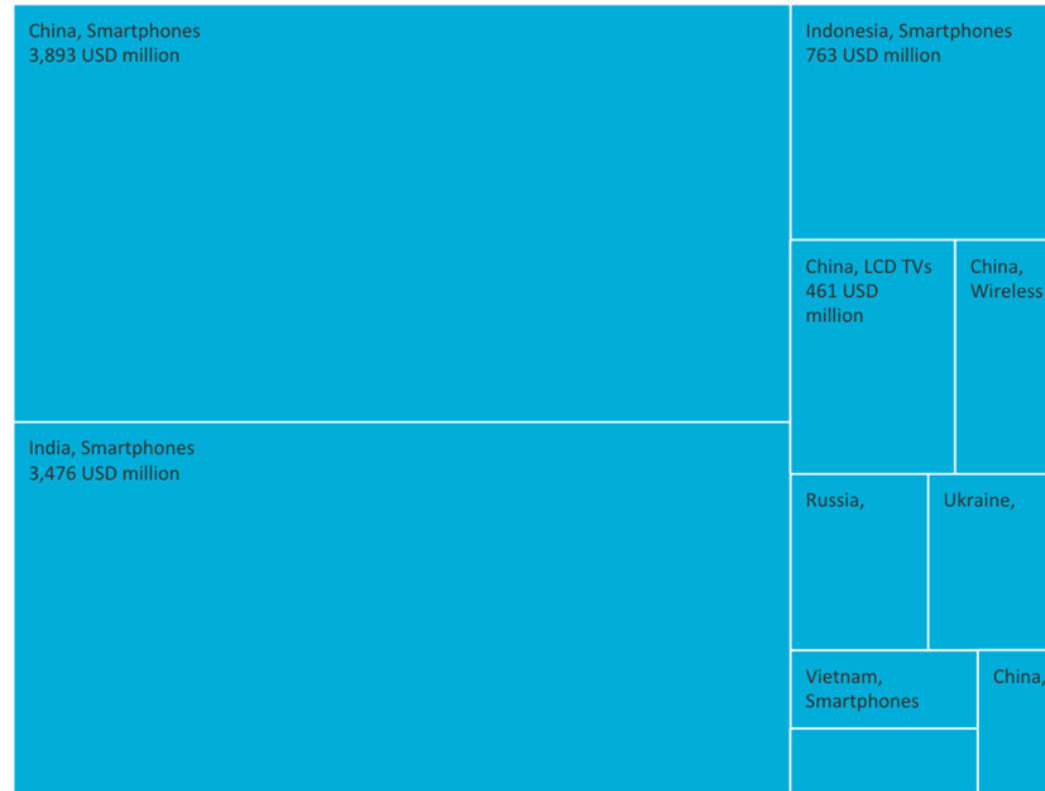
- Huawei's smartphones bore the brunt of the trade war as Google Mobile Services (GMS) were forbidden to be loaded onto Huawei's phones, limiting its appeal to consumers outside of China.
- Huawei is working to create its own ecosystem, which requires time and money, with no guarantee of success.
- In parallel, Huawei will continue to push for growth in China, while looking for other opportunities like wearables and computers to help consumers in overseas market become familiar with the brand.
- With the pandemic and other companies like Samsung and Xiaomi looking to capitalise on Huawei's woes, 2020 is looking to be an even tougher year.

Note: Absolute projected sales represent the net increase/decrease in annual sales between 2019 and 2022. See appendix for methodology on projected company sales.

Xiaomi: Poised to benefit from the resulting downturn

Xiaomi Corp: Top 10 Growth Areas, 2019-2022

Company Retail Sales RSP - USD million - Current - Fixed 2019 Exchange Rates

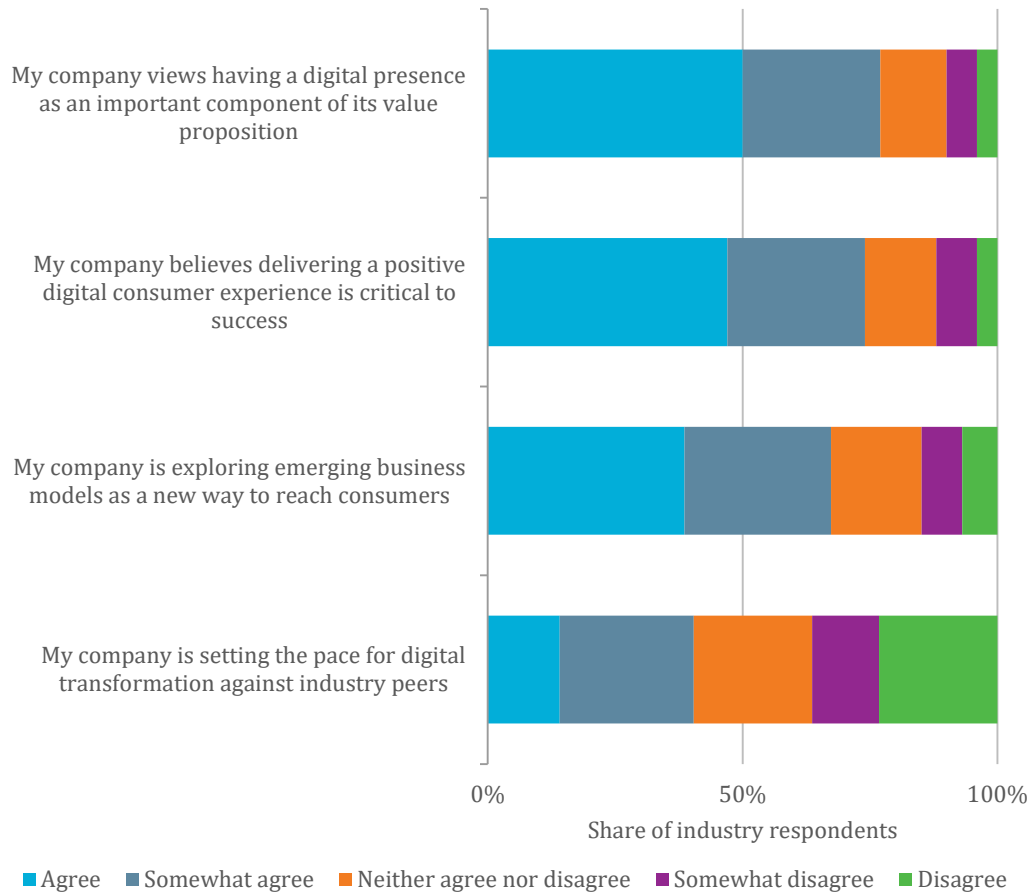


- Xiaomi's low-cost strategy propelled the young upstart into a global brand name within a short space of time, with it gaining significant share, especially in emerging markets.
- Consumers in emerging markets will be affected financially and psychologically by the pandemic, but smartphones have become such a necessity that younger consumers are willing to skimp on other non-essential purchases in order to buy a smartphone.
- Xiaomi's products are priced significantly lower than those of other branded manufacturers with similar specifications. Xiaomi will benefit as consumers look for better value rather than branded products.

Note: Absolute projected sales represent the net increase/decrease in annual sales between 2019 and 2022. See appendix for methodology on projected company sales.

Digital transformation suddenly becomes an urgency

Factors Influencing Digital Initiatives: 2019



Source: Euromonitor International's Digital Consumer Voice of the Industry Survey, November 2019

- Half of respondents agree that having a digital presence is an important part of their company's value proposition.
- However, most respondents appear to be less than positive (those answering "agree") when it comes to digital consumer experience and exploring new and emerging business models
- With movement restrictions and stores being forced to close, companies are scrambling to move online as part of their business continuity plans and resiliency efforts.
- The pandemic will drive companies to invest more and accelerate their digital transformation. The move towards online is not only for external customers. Companies have to ensure that their business operations are not being disrupted with staff being confined at home.

Introduction

Economic Outlook

Industry Impact

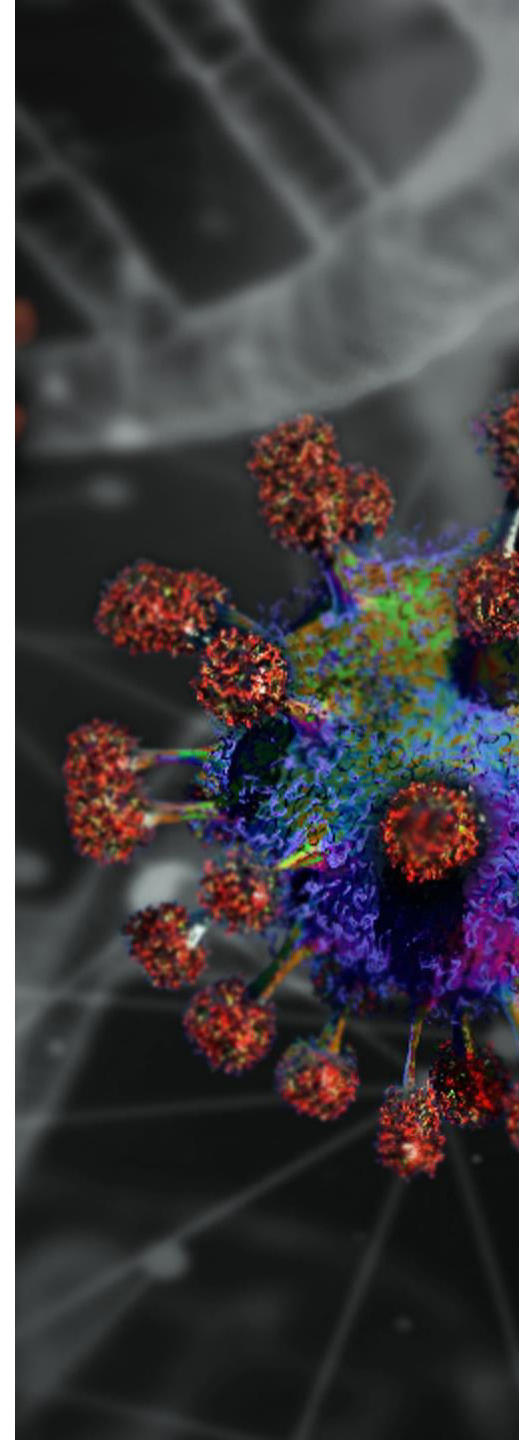
Geographic Impact

Corporate Response

Pricing Impact

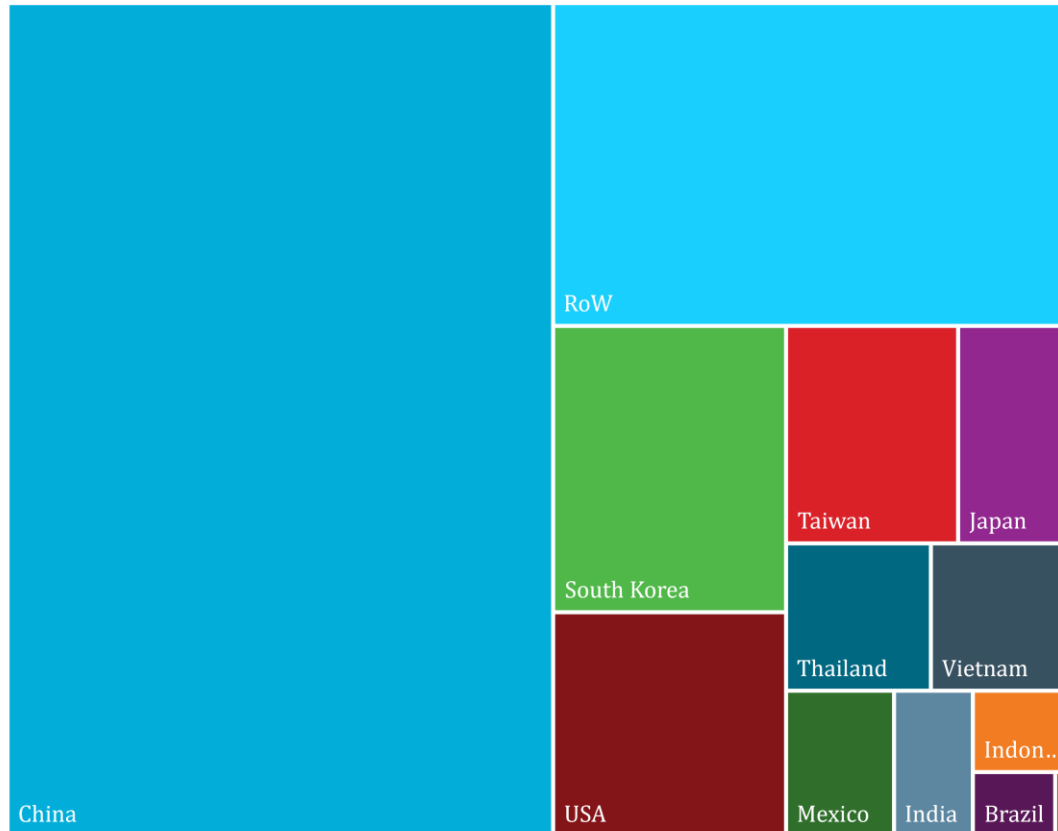
Conclusion

About Our Analytic Capabilities



Consumers will not see a price hike despite production disruption

Production Turnover of Selected Hi-tech Goods: 2020



Source: Euromonitor International

Note: USD billion, Television and Radio Receivers, Sound and Video Recording Devices, Computers and Office Machinery Electronic Components, Valves and Tubes, Mobile Phones, Radio Transmitters and Television Cameras

- China is the world's largest production hub. Countries like South Korea, the US and Taiwan have strict laws forbidding their own companies from moving cutting-edge technologies to China to protect their country's competitive edge and prevent IP theft.
- The pandemic affected most of these markets and has affected global production of electronics goods. Reduced production capacity and increased raw material prices will push up the cost of goods.
- However, consumers will probably not see a big hike in prices nor encounter shortage of products as weakened consumer sentiment proves to be a bigger hurdle for companies.

Different approach to mitigate production disruption and cost hikes

Vertical integration

- Companies like Samsung and LG were early pioneers of vertical integration, and Samsung has its hands on almost the entire supply chain.
- Vertical integration translates into economies of scale and early access to cutting edge technologies. On the other hand, the overheads to set up factories and foundries (for wafer production) are extremely high. Japanese companies like Sony, Sharp and Panasonic had to sell their factories to reduce their overheads and avoid bankruptcy.
- In times of component shortages, Samsung's consumer electronics division will get preference over other companies and will ensure that Samsung's products are available.
- However, the COVID-19 pandemic has an even bigger impact on finances and consumer sentiment. Purchases of non-essential purchases will take a backseat over necessities like food and cleaning products. Factories might be looking at huge unsold inventories.

Outsourcing

- For most consumer electronics, the focus is on the development and design of products, and most companies have sold off their factories and are reliant on contract manufacturers. Apple and Foxconn are especially open about their business relationship; while Apple has retained tight control of its design, Foxconn is an integral partner in Apple's success.
- Contract manufacturers have a global footprint and have factories in almost all key markets, like China, Vietnam, India, Brazil and even the US. The lockdown in China affected supplies, but contract manufacturers were able to ramp up production in other sites to lessen the impact.
- Critically, the resulting slowdown in the global economy due to the COVID-19 pandemic will affect sales of consumer electronics products. Apple, Xiaomi, Sony and other companies can simply reduce their orders with their suppliers and not be dragged down financially by factory overheads, affecting their profitability and revenues.

Online pre-ordering to manage inventory and costs

Models

IdeaPad S145 (14)
81MU007GSB
(Gray)

Part Number: 81MU007GSB

Web Price:
SG\$899.00
inc. GST
Ships within 2 business days.

You can add accessories to your system after adding it to the cart.

ADD TO CART
152 users have viewed this in the past 24 hours

☐ Compare models

☒ Add **1Y F** **LEAVE A MESSAGE**
with Onsite upgrade

L340 (15, AMD) [VIEW MODELS](#)

ONLINE EXCLUSIVE

**Ideapad L340 (15)
81LW000RSB
(Granite Black)**

Part Number: 81LW000RSB

Web Price:
SG\$699.00
After Instant Savings:
SG\$594.15
inc. GST
Savings: SG\$104.85
Ships within 4 weeks.

You can add accessories to your system after adding it to the cart.

ADD TO CART

Source: Screenshot from Lenovo's online store

- The implementation of work-from-home rules and online studies due to the closure of schools created a sudden spike in demand for computers within a short space of time. Retailers and manufacturers were caught off guard by the strong demand.
- Companies like Lenovo are adopting a 3-pronged strategy. Lenovo is aggressively pushing its own e-commerce store, reducing the number of SKUs to better manage inventories, and diverting key components to higher margin models.
- Entry-level models need to be pre-ordered so that the company can better plan its production capacities, especially with supplies limited.
- Confirmed orders prior to production helps generate positive cashflows and reduce inventories.
- Managing its own e-commerce store also helps generate direct touchpoints with customers and higher margins for Lenovo.

Introduction

Economic Outlook

Industry Impact

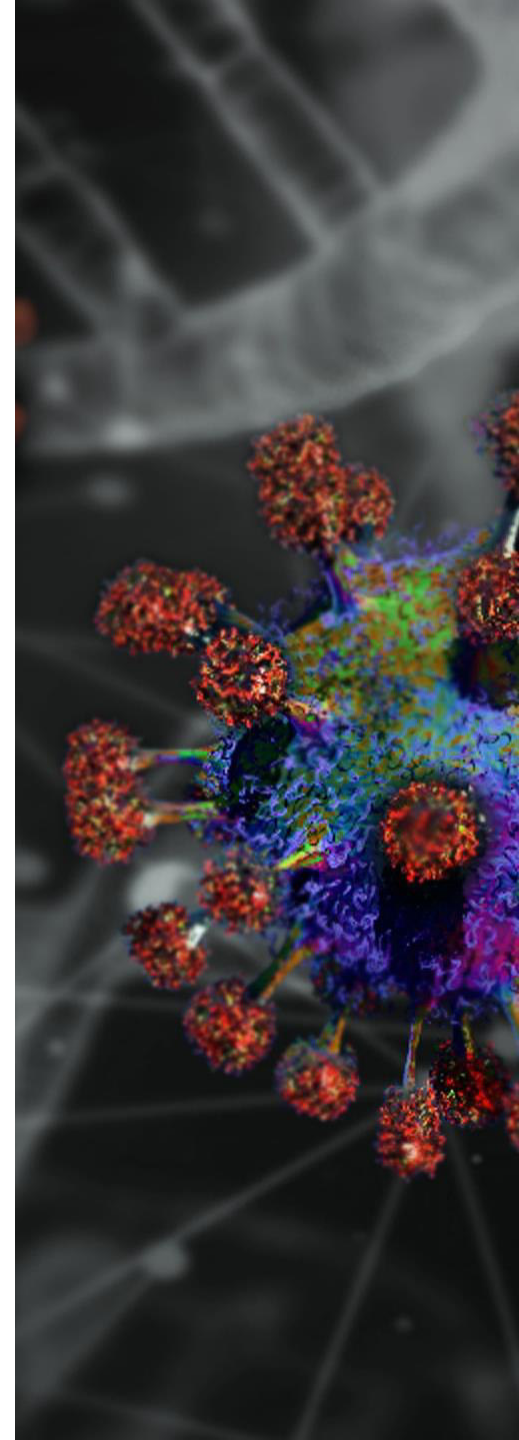
Geographic Impact

Corporate Response

Pricing Impact

Conclusion

About Our Analytic Capabilities



Consumer sentiment will be the greatest challenge, not the virus

Economic

- There is no denying the impact of the COVID-19 pandemic on the global economy.
- With country's implementing the closure of schools, working from home and, increasingly, lockdowns, many workers, especially in emerging markets and low-skilled jobs, will suffer pay cuts and even lose their jobs.
- White-collared workers are not immune to the global slowdown, and will see their disposable incomes reduced.
- With lower buying power, sales of consumer electronics will take a backseat over essentials like food, cleaning products, healthcare and saving for the future.

Psychological

- The greater challenge other than economic impact is reduced consumer sentiment. Consumer electronics are mainly nice-to-have products, used for enjoyment or relaxation.
- Consumers will still spend on low-cost guilty pleasures like wireless speakers, while smartphones are, increasingly, becoming a must have for most consumers. Sales of smartphones can also be hidden/subsidised as part of a mobile plan.
- Sales of digital TVs will suffer as consumers choose not to upgrade to the latest model and to bigger 4K TVs.

Reduced capacity

- The lockdowns in key production markets across the world hindered the availability of components and finished goods.
- The restrictions on air travel also increased the logistic cost of parts and finished goods for both manufacturers and companies.
- While companies will continue to face supply issues, the situation is not expected to manifest into a global shortage of electronic products.
- Companies will simply reduce their SKUs and focus on selling more profitable models. Consumers will not encounter instances where there will not be anything for them to buy.

Introduction

Economic Outlook

Industry Impact

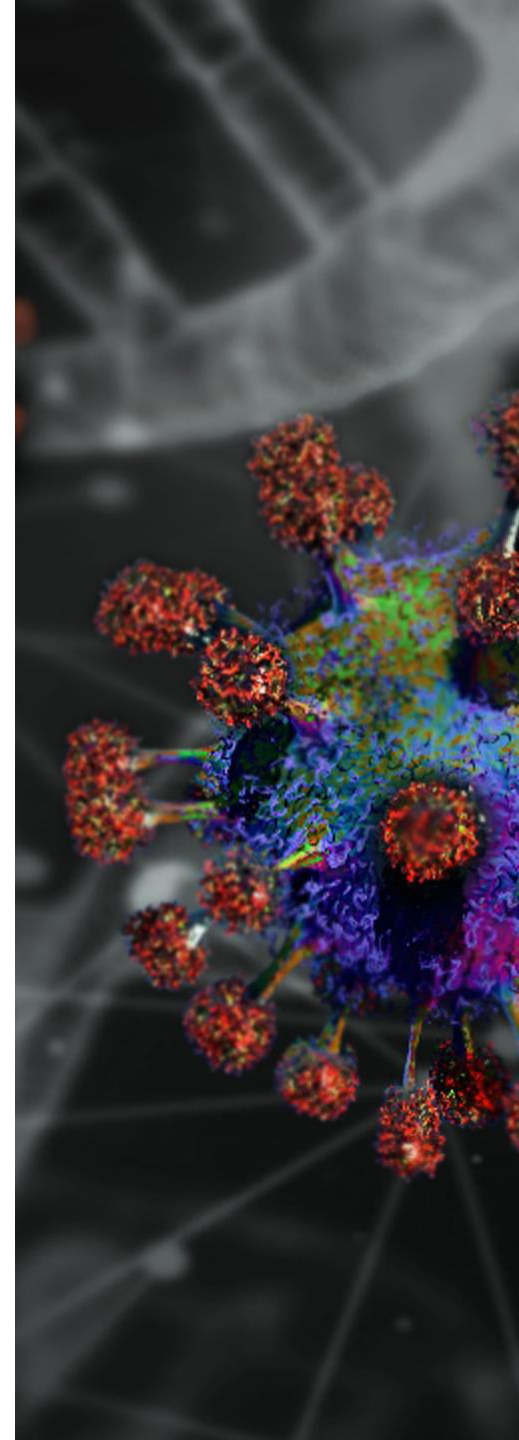
Geographic Impact

Corporate Response

Pricing Impact

Conclusion

About Our Analytic Capabilities



About Euromonitor International's Macro Model

- Euromonitor International's Macro Model allows us to regularly update key macro indicators like real GDP growth, as well as create hypothetical scenarios that simulate potential macro shocks. In turn, this ability to change macro forecasts like GDP growth allows us to create multiple retail category or income/wealth band forecasts.
- Our macro forecasts are produced as a combination of:
 - A global macroeconomic model (Euromonitor International's Macro Model) that uses data from multiple sources on GDP growth, inflation, interest rates, exchange rates and unemployment rates to forecast those variables.
 - Further adjustments via model shocks/scenarios to reflect other variables and information that is not taken into account directly by the pure model forecast. For example, other credit market or confidence measures, as well as the macro views of policy institutions and other private sector forecasters.
- Euromonitor International's Macro Model itself is an extended version of one of the main forecasting and scenario analysis models of the IMF (International Monetary Fund). The benchmark model has five observable variables for each economy. These are real GDP, the consumer price index, a short-term interest rate, the unemployment rate, and the exchange rate against the US dollar.

About Via Pricing from Euromonitor International

- Via Pricing is a new price and assortment intelligence solution built from web data extraction. Every day we capture data for more than 10 million SKUs from 1,500 e-commerce websites across 40 countries, providing daily updates to online retail pricing, assortment size and key product attributes.
- Via Pricing is built using a combination of our longstanding research expertise and web data extraction technology. Using Artificial Intelligence (AI), text and image recognition technology we match the same product (SKU) across multiple websites and also map each SKU to our existing product taxonomy.
- Our global team of fmcg industry analysts help train the AI to accurately match SKUs to the correct product category, brand owner and brand family, and then spot check product matching and taxonomy mapping to guarantee Via Pricing's continued accuracy. Their industry expertise and fluency in local languages ensures the right products are being correctly matched across markets and retailer websites.
- Our ability to match millions of SKUs to their corresponding category, brand owner and brand allows us to impose structure on a vast data set. In addition to viewing SKUs one-by-one, Via Pricing provides comprehensive price data by category, brand owner, brand, or retailer directly built from individual SKUs.

Applications for Via Pricing



- Optimise pricing strategies
- Build and maintain price corridors
- Plan promotional calendars
- Analyse online product assortment
- Pick where to play
- Track product trends



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Computers and Peripherals in the US

Euromonitor International

September 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
COVID-19 exacerbates existing weaknesses within computers and peripherals	1
Business-to-business market A bright spot during lockdown.....	2
Leading US players feel pressure from competitively-priced Asian brands during the pandemic	2
RECOVERY AND OPPORTUNITIES	3
Overall decline predicted for computers and peripherals over the forecast period with laptops offering best hope for development through retail.....	3
Long-term shift towards working from home to further boost b2b portable computers	3
Versatility of convertible laptops will continue to attract consumers, but greater competition within category will further reduce average unit price	3
CATEGORY DATA.....	4
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	5
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	6
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	6
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	7
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10

Table 21	Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22	Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23	Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN THE US

KEY DATA FINDINGS

- COVID-19 exacerbates existing weaknesses within category, but work from home measures improve business sales for laptops and tablets
- Retail volume sales of computers and peripherals decline by 5% in 2020, falling to 89 million units
- Laptops is strongest overall performer in volume terms in 2020 supported by business demand, reaching 40.3 million units in total volume terms (retail and business)
- Apple Inc retains leadership of computers and peripherals in 2020 with a 22% retail volume share, but COVID-19 factory shutdowns in addition to a processor shortage negatively impacts many players
- Over the forecast period, computers and peripherals is predicted to record a -6% retail volume CAGR, falling to 66.8 million units by 2025

2020 IMPACT

COVID-19 exacerbates existing weaknesses within computers and peripherals

In light of the economic situation presented by COVID-19 in the US, retail sales of computers and peripherals suffered overall in Q2. Categories that were already in decline struggled the most as local consumers had all the more reason to shun certain products that they could not justify, with the case for their usefulness more difficult to make. This was evident in the stronger declines experienced by desktops, monitors and tablets, with the latter in general already competing with large-screened smartphones for consumers' attention as they are able to perform similar functions. When consumers are faced with limited funds or are exercising greater discretion in their spending habits, they seek the most versatile options. In the US, this has led consumers to focus more on laptops, a trend which was already evident prior to the pandemic with additional factors that have led to the resilience of this product. In addition to its versatility and portability, an increase in the quality of gaming laptops (an activity which has in previous years supported demand for specialist equipment including large-screen monitors) and the introduction of more affordable but quality models, have attracted this consumer segment, with increased amounts of time spent at home during the pandemic creating further opportunities for the online gaming crowd.

One of the more pronounced effects of COVID-19 pandemic has been on youth education in the US. Many schools, from kindergarten through to high schools, have either switched to an entirely remote format or a partial one, with students attending class in person on a limited basis and the remainder of the education taking place at home. This trend has also supported the stronger performance of retail demand for laptops in Q2, with the latter only recording a marginal decline compared to tablets, peripherals, and desktops. An increasing number of family members spending longer periods at home at the same time, and therefore often competing for computer access, has placed pressure on stretched household finances, but has also supported and highlighted the need for more than one portable device. Competitive pricing therefore was a factor in supporting consumers' purchasing decisions, with a surge in demand

for this category through e-commerce; not only did this distribution channel offer the safety and convenience of being able to place online orders from home with delivery options, but it also allowed them to make comprehensive searches and comparisons on various products within their budget in addition to reading reviews from other users.

The emergence of COVID-19 has created a unique situation for laptops in 2020; there has been demand for portable computers in Q2 while at the same time, supply is being strangled. In mid-February, prior to the introduction of lockdowns which began in earnest in the US, the last device shipments left factories in China before their own lockdown began and production ground to a halt. Since then, production has resumed, but pandemic-related restrictions on commercial flights and shipping created new issues and delays. The subsequent spike in global demand further strained supply considering that Q1 demand in the US was poor. All these factors combined to produce a situation where despite, demand for the product, unit sales in 2020 for laptops are likely to be essentially flat over the year.

Business-to-business market A bright spot during lockdown

Business-to-business demand for computers was the most positive outcome for the category during the pandemic with positive demand for both laptops and tablets through business in Q2 2020 compared to stagnation and decline respectively in 2019. With many employees shifting to working from home or remote status, some companies were forced to adapt and outfit workers appropriately with equipment. With their employees out of the office, quickly setting up home workstations became a priority for many workers. Sales of business laptops and tablets are likely to show notable growth for the year, while desktops, devices typically used in office and retail settings, experienced a marked decline in Q2, a contrast to its positive performance in 2019. If, as some believe, the trend towards remote working has some staying power, it is likely that the growth of laptops for business will continue apace.

Leading US players feel pressure from competitively-priced Asian brands during the pandemic

American companies continued to lead computers, with a domestic company in command of all three categories. However, while Apple continued to control tablets, gaining further retail volume share in Q2 2020, it experienced declining demand after a strong performance in 2019 in response to the new iPad, including a notebook replacement calibre model. Despite strong consumer loyalty amongst more affluent consumers, the unstable economic situation during the pandemic and the search for greater affordability resulted in second-ranked Samsung gaining strong retail volume share and recording the only positive sales performance within tablets.

A similar situation was noted within laptops; although US companies HP and Dell continued to lead with slim share difference between them, both recorded marginal declines in retail volume sales, while the competitive pricing of Chinese brand Lenovo and the Taiwanese brand Asus resulted in share gains for both, with the latter recording the strongest retail volume growth in Q2. AsusTek Computer Inc has continued to innovate over the review period, exploring the dual screen concept through its Asus ZenBook Pro Duo which has been well received. Nevertheless, while sales of these brands may have been covered by existing stock in the first half of the year, delays along the supply chain in terms of production of goods and shipments from China could have a negative impact on availability later in 2020.

US companies continued to dominate the declining category of peripherals, with an increasing number of employees switching to home working during the pandemic. Dell and HP ranked first and second in monitors, respectively, gaining further share in Q2 2020, but again losing sales while Samsung gained ground from smaller players and recorded the strongest performance in retail volume growth terms. The picture in printers is somewhat different, with HP by far the

dominant force, gaining further retail volume share but in line with the declining trend evident within this category, continued to lose sales during the pandemic as an increasing number of employees worked from home, communicating electronically and reducing the need to print out reports.

RECOVERY AND OPPORTUNITIES

Overall decline predicted for computers and peripherals over the forecast period with laptops offering best hope for development through retail

Demand for overall computers and peripherals is predicted over the course of the forecast period, although performances will vary within the different categories. Retail volume sales of printers, monitors, desktops and tablets will continue to experience declining demand in a continuation of trends already evident prior to the pandemic. While demand for portable computers such as laptops was supported by the increasing number of Americans forced to work or study from home, the staying power of this new learning arrangement for the latter, is likely to be limited. As the workforce gradually returns to offices, parents, especially those of younger children, will find the situation untenable. Ultimately the duration of remote schooling will depend on factors such as the effective use of social distancing to reduce the number of COVID-19 cases and the availability of an effective vaccine. However, in the short term, there will be an increased demand for inexpensive computing options, especially those geared towards younger users. Devices such as durable tablets and Chromebooks will be particularly attractive for parents who need a quick and easy way to get their children online. E-commerce could therefore continue to benefit from this trend, offering competitive pricing.

Long-term shift towards working from home to further boost b2b portable computers

Schools are not the only segment of American society that shifted to home-based operations during the pandemic. After having no other choice due to restrictions imposed on them by local governments and health and safety recommendations, many companies shifted to a remote work format. This strategy appeared to be successful for many companies, despite initial concerns that business could suffer with employees not being together in an office setting. This scenario has led some companies to rethink their operations entirely and to continue remote working on a more permanent basis. The decrease in overheads from having a smaller base of operations is proving to be very enticing, especially in urban settings where real estate is at a premium price. As an increasing number of employers make the shift to remote working permanent over the early part of the forecast period with the virus still in circulation, or at least more available to employees, it will support the more positive prediction for business sales of laptops due to the latter's greater versatility and ease of setting up. On the other hand, this will have a negative impact on demand for business sales of desktops over the course of the forecast period, although there are still some professions that demand the storage and graphic capabilities that still can only be offered by a desktop.

Versatility of convertible laptops will continue to attract consumers, but greater competition within category will further reduce average unit price

Many producers of computers have shown several strategies as a way to grow and still remain attractive to different consumer groups either through pursuing constant innovation, aligning their offerings with the consumer desire for performance as well as mobility in addition

to offering high-end devices in terms of touchscreen technology, greater storage capacity, or detachable keyboards. The latter became an increasingly desired attribute in 2020; while fixed laptops continued to dominate demand, convertible models gained notable retail volume share and recorded the most impressive growth in Q2, a trend which is predicted to continue over the course of the forecast period, with convertible laptops becoming the dominant choice by 2025. Nevertheless, development must also take into consideration affordability to a wider audience, a factor which Asian brands such as Asus exposed during the pandemic, showing a need to offer more competitive pricing, especially for lower-income families which were forced to invest in a portable device of acceptable quality during the lockdown. This trend is therefore predicted to impact the average unit price of laptops over the forecast period, which is set to record further decline at constant 2020 prices.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	94,994.8	88,512.7	81,920.6	77,991.3	75,659.9	71,217.8
- Desktops	7,616.1	6,937.6	6,389.2	5,887.5	5,733.1	5,297.3
- Portable Computers	87,378.7	81,575.2	75,531.4	72,103.8	69,926.8	65,920.5
-- Laptops	24,471.7	24,424.1	24,869.3	25,394.4	26,558.5	26,332.6
-- Tablets	62,907.0	57,151.1	50,662.1	46,709.4	43,368.3	39,587.9
Peripherals	21,353.2	19,757.5	18,738.0	18,774.3	18,558.9	17,880.4
- Monitors	5,792.8	5,040.0	4,701.0	4,976.3	5,033.8	4,871.4
- Printers	15,560.4	14,717.5	14,037.0	13,798.0	13,525.1	13,009.0
Computers and Peripherals	116,348.0	108,270.2	100,658.6	96,765.6	94,218.8	89,098.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

USD million	2015	2016	2017	2018	2019	2020
Computers	43,383.1	39,119.6	35,773.8	33,171.6	31,423.4	29,050.5
- Desktops	4,990.2	4,244.7	3,920.4	3,828.0	3,757.2	3,502.4
- Portable Computers	38,392.9	34,874.9	31,853.4	29,343.6	27,666.2	25,548.1
-- Laptops	16,157.4	15,354.5	15,384.3	15,478.1	16,073.8	15,921.1
-- Tablets	22,235.5	19,520.4	16,469.1	13,865.4	11,592.4	9,627.0
Peripherals	3,251.3	3,010.6	2,849.1	3,003.0	3,037.2	2,889.2
- Monitors	1,179.1	1,047.5	992.6	1,187.5	1,267.4	1,211.5
- Printers	2,072.2	1,963.1	1,856.5	1,815.5	1,769.8	1,677.7
Computers and Peripherals	46,634.4	42,130.2	38,622.9	36,174.6	34,460.6	31,939.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total

Computers	-5.9	-5.6	-25.0
- Desktops	-7.6	-7.0	-30.4
- Portable Computers	-5.7	-5.5	-24.6
-- Laptops	-0.9	1.5	7.6
-- Tablets	-8.7	-8.8	-37.1
Peripherals	-3.7	-3.5	-16.3
- Monitors	-3.2	-3.4	-15.9
- Printers	-3.8	-3.5	-16.4
Computers and Peripherals	-5.4	-5.2	-23.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-7.6	-7.7	-33.0
- Desktops	-6.8	-6.8	-29.8
- Portable Computers	-7.7	-7.8	-33.5
-- Laptops	-0.9	-0.3	-1.5
-- Tablets	-17.0	-15.4	-56.7
Peripherals	-4.9	-2.3	-11.1
- Monitors	-4.4	0.5	2.8
- Printers	-5.2	-4.1	-19.0
Computers and Peripherals	-7.3	-7.3	-31.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	42,895.3	42,908.6	43,492.8	42,675.3	42,736.8	42,144.2
- Desktops	21,321.0	20,389.1	20,016.6	19,323.1	19,729.3	18,577.7
- Portable Computers	21,574.4	22,519.5	23,476.2	23,352.2	23,007.5	23,566.5
-- Laptops	11,734.8	12,327.7	12,937.5	13,678.1	13,678.1	13,999.3
-- Tablets	9,839.6	10,191.8	10,538.7	9,674.1	9,329.3	9,567.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

USD million	2015	2016	2017	2018	2019	2020
Computers	28,141.6	27,276.0	26,419.8	25,600.5	26,164.3	25,606.2
- Desktops	15,610.5	14,410.7	13,224.3	12,981.4	13,735.1	12,413.7
- Portable Computers	12,531.1	12,865.3	13,195.5	12,619.1	12,429.2	13,192.5
-- Laptops	9,051.4	9,311.0	9,592.9	9,612.2	9,836.0	9,877.6
-- Tablets	3,479.7	3,554.3	3,602.6	3,006.9	2,593.2	3,314.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.4	-0.4	-1.8
- Desktops	-5.8	-2.7	-12.9
- Portable Computers	2.4	1.8	9.2
-- Laptops	2.3	3.6	19.3
-- Tablets	2.5	-0.6	-2.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	-2.1	-1.9	-9.0
- Desktops	-9.6	-4.5	-20.5
- Portable Computers	6.1	1.0	5.3
-- Laptops	0.4	1.8	9.1
-- Tablets	27.8	-1.0	-4.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	23.1	29.1	33.6
Fixed	76.9	70.9	66.4
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	8.4	11.1	15.0	19.8	23.6	23.0
iOS	32.1	30.1	35.1	33.3	37.4	38.1
Android	59.5	58.8	49.9	46.9	39.0	38.9
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Apple Inc	20.2	22.4	21.0	22.4	22.1
HP Inc	14.0	15.3	15.7	16.5	17.1
Dell Inc	7.7	8.3	8.4	8.7	9.0
Samsung Electronics America Inc	8.6	8.2	7.3	7.9	9.0
Lenovo Group Ltd	6.9	7.3	7.5	7.6	7.8
Amazon.com Inc	4.7	5.5	5.9	5.5	4.8
AsusTek Computer Inc	3.9	3.8	3.8	4.0	4.4
Microsoft Corp	2.6	2.7	2.7	2.7	2.8
Acer America Corp	2.1	2.3	2.3	2.3	2.4
Epson America Inc	1.8	2.0	2.0	2.1	2.1
Canon USA Inc	2.0	2.1	2.1	2.0	1.9
Brother Industries USA Inc	1.1	1.2	1.2	1.2	1.2
ViewSonic Corp	0.5	0.5	0.5	0.5	0.5
TPV Technology Ltd	0.4	0.4	0.4	0.4	0.4
LG Electronics USA	0.3	0.3	0.3	0.3	0.3
Lexmark International Inc	0.2	0.2	0.2	0.2	0.1
Toshiba America Inc	1.1	0.6	-	-	-
Acer Inc	0.3	0.3	-	-	-
Barnes & Noble Inc	-	-	-	-	-
Sony Corp of America	-	-	-	-	-
Hewlett-Packard Development Co LP	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-
Others	21.6	16.8	18.7	15.9	14.0
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP	HP Inc	15.3	15.7	16.5	17.1
iPad	Apple Inc	17.7	16.1	17.2	16.9
Dell (Dell Technologies Inc)	Dell Inc	8.3	8.4	8.7	9.0
Samsung (Samsung Corp)	Samsung Electronics America Inc	8.2	7.3	7.9	9.0
Lenovo	Lenovo Group Ltd	7.3	7.5	7.6	7.8
Fire	Amazon.com Inc	5.5	5.9	5.5	4.8
Asus	AsusTek Computer Inc	3.8	3.8	4.0	4.4
MacBook	Apple Inc	3.4	3.6	3.8	3.9
Microsoft Surface	Microsoft Corp	2.7	2.7	2.7	2.8
Acer (Acer Inc)	Acer America Corp	2.3	2.3	2.3	2.4
Epson (Seiko Epson Corp)	Epson America Inc	2.0	2.0	2.1	2.1
Canon (Canon Inc)	Canon USA Inc	2.1	2.1	2.0	1.9
Mac	Apple Inc	1.3	1.3	1.3	1.2
Brother (Brother Industries Ltd)	Brother Industries USA Inc	1.2	1.2	1.2	1.2
Viewsonic	ViewSonic Corp	0.5	0.5	0.5	0.5

AOC	TPV Technology Ltd	0.4	0.4	0.4	0.4
LG (LG Corp)	LG Electronics USA	0.3	0.3	0.3	0.3
Lexmark (Apex Technology Co Ltd)	Lexmark International Inc	0.2	0.2	0.2	0.1
Toshiba (Toshiba Corp)	Toshiba America Inc	0.6	-	-	-
Gateway	Acer Inc	0.3	-	-	-
Nook	Barnes & Noble Inc	-	-	-	-
Dell	Dell Inc	-	-	-	-
Compaq	Hewlett-Packard Development Co LP	-	-	-	-
HP	Hewlett-Packard Development Co LP	-	-	-	-
Lexmark	Lexmark International Inc	-	-	-	-
Blackberry	Research in Motion Ltd	-	-	-	-
Sony (Sony Corp)	Sony Corp of America	-	-	-	-
Others	Others	16.8	18.7	15.9	14.0
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	44.0	43.4	42.7	42.7	42.3	19.8
- Grocery Retailers	1.9	1.9	1.9	1.8	1.8	0.7
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	1.9	1.9	1.9	1.8	1.8	0.7
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	35.3	34.8	34.2	34.4	33.1	15.6
-- Electronics and Appliance Specialist Retailers	32.4	32.0	31.5	30.5	28.9	10.6
-- Other Non-Grocery Specialists	2.9	2.8	2.7	3.9	4.2	5.0
- Mixed Retailers	6.8	6.7	6.7	6.5	7.4	3.5
Non-Store Retailing	56.0	56.6	57.3	57.3	57.7	80.2
- Direct Selling	-	-	-	-	-	-
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.1
- E-Commerce	56.0	56.6	57.3	57.2	57.7	80.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	71,217.8	68,326.2	64,145.4	60,484.3	56,885.6	53,076.6
- Desktops	5,297.3	4,588.4	4,221.5	3,871.2	3,535.9	3,337.5
- Portable Computers	65,920.5	63,737.7	59,923.9	56,613.1	53,349.7	49,739.1
-- Laptops	26,332.6	26,369.4	26,357.1	26,295.7	26,182.0	26,012.4

-- Tablets	39,587.9	37,368.3	33,566.8	30,317.4	27,167.8	23,726.6
Peripherals	17,880.4	17,223.9	16,417.0	15,497.6	14,562.6	13,681.5
- Monitors	4,871.4	4,482.3	4,099.9	3,730.2	3,384.9	3,070.8
- Printers	13,009.0	12,741.6	12,317.1	11,767.4	11,177.7	10,610.7
Computers and Peripherals	89,098.2	85,550.1	80,562.4	75,981.8	71,448.2	66,758.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

USD million	2020	2021	2022	2023	2024	2025
Computers	29,050.5	28,532.4	26,830.5	25,526.8	23,806.3	22,142.5
- Desktops	3,502.4	3,067.3	2,840.3	2,621.4	2,430.1	2,326.7
- Portable Computers	25,548.1	25,465.1	23,990.1	22,905.3	21,376.2	19,815.9
-- Laptops	15,921.1	16,168.6	15,889.9	15,735.6	15,047.7	14,349.7
-- Tablets	9,627.0	9,296.5	8,100.2	7,169.7	6,328.5	5,466.1
Peripherals	2,889.2	2,978.6	2,786.3	2,584.6	2,432.8	2,221.1
- Monitors	1,211.5	1,245.7	1,126.7	1,013.7	970.3	883.0
- Printers	1,677.7	1,732.8	1,659.6	1,570.9	1,462.5	1,338.0
Computers and Peripherals	31,939.7	31,511.0	29,616.7	28,111.3	26,239.1	24,363.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-4.1	-5.7	-25.5
- Desktops	-13.4	-8.8	-37.0
- Portable Computers	-3.3	-5.5	-24.5
-- Laptops	0.1	-0.2	-1.2
-- Tablets	-5.6	-9.7	-40.1
Peripherals	-3.7	-5.2	-23.5
- Monitors	-8.0	-8.8	-37.0
- Printers	-2.1	-4.0	-18.4
Computers and Peripherals	-4.0	-5.6	-25.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-1.8	-5.3	-23.8
- Desktops	-12.4	-7.9	-33.6
- Portable Computers	-0.3	-5.0	-22.4
-- Laptops	1.6	-2.1	-9.9
-- Tablets	-3.4	-10.7	-43.2
Peripherals	3.1	-5.1	-23.1

- Monitors	2.8	-6.1	-27.1
- Printers	3.3	-4.4	-20.2
Computers and Peripherals	-1.3	-5.3	-23.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	42,144.2	41,893.3	41,865.0	41,428.2	40,799.8	39,450.3
- Desktops	18,577.7	17,405.4	16,939.1	16,650.3	16,291.6	15,645.7
- Portable Computers	23,566.5	24,487.8	24,925.9	24,778.0	24,508.2	23,804.6
-- Laptops	13,999.3	15,033.0	15,733.6	15,997.3	16,287.2	16,290.2
-- Tablets	9,567.2	9,454.8	9,192.3	8,780.7	8,221.0	7,514.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

USD million	2020	2021	2022	2023	2024	2025
Computers	25,606.2	23,762.9	22,364.1	20,859.2	18,687.2	16,427.4
- Desktops	12,413.7	11,340.6	10,536.1	9,886.8	8,981.7	7,976.6
- Portable Computers	13,192.5	12,422.4	11,828.0	10,972.5	9,705.5	8,450.8
-- Laptops	9,877.6	9,240.7	8,823.8	8,185.5	7,342.8	6,573.4
-- Tablets	3,314.9	3,181.6	3,004.2	2,787.0	2,362.7	1,877.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-0.6	-1.3	-6.4
- Desktops	-6.3	-3.4	-15.8
- Portable Computers	3.9	0.2	1.0
-- Laptops	7.4	3.1	16.4
-- Tablets	-1.2	-4.7	-21.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	-7.2	-8.5	-35.8

- Desktops	-8.6	-8.5	-35.7
- Portable Computers	-5.8	-8.5	-35.9
-- Laptops	-6.4	-7.8	-33.5
-- Tablets	-4.0	-10.7	-43.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	33.6	38.6	42.7	46.8	49.3	52.1
Fixed	66.4	61.4	57.3	53.2	50.7	47.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	23.0	23.0
iOS	38.1	39.0
Android	38.9	38.1
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in China

Euromonitor International

September 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Home working and home schooling present opportunities for portable computers.....	1
Gamers and workers looking for more from their laptops	1
More consumers go online as lockdown limits offline sales.....	2
RECOVERY AND OPPORTUNITIES	2
Education Modernisation 2035 plan offers potential for growth	2
Flexible working arrangements set to dictate business sales	3
Competition set to intensify as smaller players are forced out of the market.....	3
CATEGORY DATA.....	4
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015- 2020	6
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017- 2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	9
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	10
Table 18 Forecast Sales of Computers by Category: Business Volume 2020- 2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	11
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	11
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23 Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN CHINA

KEY DATA FINDINGS

- COVID-19 hurts sales of desktops and peripherals in 2020 but boosts demand for portable computers
- Computers and peripherals is set to decline by 2% in retail volume terms in 2020 to reach 51.3 million units
- Laptops is expected to be the most dynamic category in 2020 with retail volume growth of 2%
- Lenovo (China) Ltd leads with a retail volume share of 20% in 2020
- Over the forecast period, computers and peripherals is projected to decline at a retail volume CAGR of 3% to reach 45.1 million units in 2025

2020 IMPACT

Home working and home schooling present opportunities for portable computers

COVID-19 has had a widespread impact on schools and businesses in 2020 with it forcing consumers to change the way they work and study. During the lockdown schools and businesses were shut with consumers having to work and study at home using online facilities instead. This provided a boost to sales of laptops and tablets. Some households needed to buy additional devices to support the needs of the household, while others used the lockdown as an opportunity to upgrade their existing devices. Business volume sales are expected to produce particularly good results in 2020, with companies ramping up their digitalisation strategies with the government encouraging people to continue working from home where possible. Even as schools and colleges reopen many office workers will likely continue to work from home, which should benefit portable computers which offer greater flexibility than desktops.

During the lockdown parents were forced to educate their children at home, with many primary and secondary schools making use of online classrooms and e-learning. With many parents having to use the household computer for their own work this created demand for additional laptops and tablets. China was already pursuing a modernisation strategy for its education system and the impact of COVID-19 is likely to have helped speed up the transition to e-textbooks and other online resources.

Gamers and workers looking for more from their laptops

As the digital sphere becomes an increasingly important part of the lives of consumers in China the demand for more powerful and specialist computers is growing. One area which continues to thrive in 2020 is gaming laptops, with the lockdown encouraging even more consumers to take up this hobby. Online games such as Player Unknown's Battlegrounds (PUBG) have encouraged solid growth in the Chinese gaming population, with eSports now officially recognised by China's Ministry of Human Resources and Social Security as a profession. Gamers have fairly high expectations for their laptops, such as HD display, high quality speakers, smooth operation, and strong heat-dissipation capabilities. As such, gamers are often willing to spend more to purchase professional gaming laptops. Moreover, gamers are

likely to replace and upgrade laptops relatively frequently, compared with most consumers, as they look to optimise their gaming experience. Laptops which are suitable for gaming and work are also growing in popularity, such as Dell's Alienware m15 series.

In terms of business use, there is a growing trend towards laptops which can interact with smartphones to help make the user's working life more efficient. This has helped support sales of products such as Huawei's Matebook 13 & 14 series, along with the popular Lenovo One series. The need for flexibility when working is also reflected in the growing demand for convertible laptops, while touchscreen models are also growing in popularity. Thin/ultra-thin and big screens are also a key driver of growth, with these helping to support working and gaming, while being convenient and lighter to transport, which is especially important for commuters. With consumers having to work from home more during 2020 these considerations have come to the fore and should continue to drive growth in the short-term as more consumers blend their working life between home and the office.

More consumers go online as lockdown limits offline sales

E-commerce had already established itself as one of the leading distribution channels for computers and peripherals during the review period, but the lockdown in 2020 has provided a further push, with online sales expected to dominate by the end of the year. E-commerce giants Alibaba and JD.com have managed to build a sprawling online ecosystem which enables consumers to access almost anything they want online, with sales events such as Single's Day/11.11 and 618 helping to drive significant sales, including for computers and peripherals. Livestreaming has also become an important way for manufacturers and retailers to communicate with consumers, with it increasingly seen as an important source of entertainment, with consumers able to interact with their favourite presenters. With COVID-19 forcing people to spend more time at home this has not only limited access to store-based retailers but it has also resulted in consumers spending more time online, with some taking the opportunity to research the latest models and their benefits. With social distancing concerns likely to remain at least in the short-term it is probable that e-commerce will continue to gain share, with some consumers looking to avoid visiting busy shopping malls.

RECOVERY AND OPPORTUNITIES

Education Modernisation 2035 plan offers potential for growth

In 2019, The Communist Party of China Central Committee and the State Council laid out its Education Modernization 2035 plan, which forms part of the country's goal to become a fully-developed nation by 2049. Part of this plan includes more widespread use of the internet, big data and Artificial Intelligence (AI), with China looking to perfect its delivery of online education. Rather than provide a setback to these plans, COVID-19 has been seen to have accelerated them. For example, 24,000 online courses were made available for free to Chinese higher education institutions from February 2020, while the Ministry of Education launched a national cloud classroom for primary and secondary students, through which students could access materials through their smartphone, computer, or television. With the ability to distribute materials electronically this is likely to drive a shift to paperless learning, which in turn should help drive demand for computers, especially laptops and tablets. However, it is possible that smartphones will be sufficient for this purpose, which could limit the effect, while another challenge will be China's declining birth rate. Despite the government changing from a one-child policy to a two-child policy in 2015 the birth rate continues to fall.

Flexible working arrangements set to dictate business sales

COVID-19 forced many employees to work from home during the lockdown and beyond in order to help prevent the spread of COVID-19. It is likely that this could bring about a more permanent change in the working lives of consumers in China, with home working offering several benefits to both the employer and the employee. Business sales of laptops and tablets had been struggling prior to COVID-19, but the lockdown saw a surge in demand and it is expected that this return to growth could continue over the forecast period.

Given their convenience, tablets are expected to see a resurgence in terms of business sales. Previously tablets were seen as purely entertainment devices, but this view is changing as manufacturers focus on making them more adaptable and more powerful. Furthermore, helping consumers work more efficiently and productively is also the focus of leading manufacturers as they look to attract more professionals. Examples include Huawei's Matepad Pro which enables users to connect the screens of smartphones and tablets while also coupling with its keyboard and M-pencil to make it more user friendly and flexible. Similarly, Apple iPad pro 2020 offers a connected keyboard and touchpad. With employees expected to spend more time working from home over the forecast period having portable computers is likely to prove increasingly attractive, but this is, however, likely to have a detrimental effect on desktops. With many employees no longer fixed to their desk flexibility will become increasingly important, with this also likely to be reflected in laptops with convertible models expected to gain further share.

Competition set to intensify as smaller players are forced out of the market

The fierce competition and fast-upgrading of technology and changing consumer demands within computers and peripherals in China has made the competitive landscape increasingly consolidated, with smaller players struggling to keep up. COVID-19 resulted in a disruption of the supply chain and store-based sales. However, this will likely help the leading brands gain even greater share as they are more resilient due to larger supply chains and significant investments in pursuing omni-channel strategies. As such, the competitive landscape is expected to become even more consolidated over the forecast period, with Lenovo, Apple and Huawei leading the way.

Lenovo has retained the lead in 2020 thanks to the popularity of its wide product portfolio which includes ultra-light laptops and gaming laptops. It has also focused heavily on developing its online sales, with it promoting a unified pricing system for its online and offline sales. Although COVID-19 did have an impact on its supply chain, its Wuhan factory is highly automated and so the impact has not been as severe as for some other manufacturers. The company hopes that the latest model in its Savior line of laptops will help it rebound from disappointing sales in 2020, with this being its most powerful line yet, featuring an upgraded intelligent display, superior graphics, fast-charging battery and more durable keyboard.

Huawei is expected to become a growing threat to Lenovo's lead over the forecast period with it not only being at the cutting edge of technological development, but it is also offering its products at competitive prices compared to other leading players such as Apple. The company has shifted its focus from hardware to software as it looks to expand its reach with it aiming to upgrade the working experience and improve working efficiency, with new products such as its Huawei Matepad Pro. Furthermore, showing its adaptability, in response to the rising home-schooling demands during the lockdown, Huawei launched its Matepad line of tablets in 2020 which is specifically designed for students.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	50,957.3	46,411.0	43,474.5	42,256.4	42,450.2	41,989.0
- Desktops	10,099.9	8,887.9	8,176.9	7,681.0	6,925.5	5,983.7
- Portable Computers	40,857.4	37,523.0	35,297.6	34,575.5	35,524.7	36,005.3
-- Laptops	22,854.4	21,140.3	19,914.2	19,607.5	20,043.4	20,462.0
-- Tablets	18,003.0	16,382.7	15,383.4	14,968.0	15,481.3	15,543.3
Peripherals	13,234.1	12,043.0	10,996.5	10,391.3	9,730.6	9,291.2
- Monitors	9,315.2	8,476.9	7,680.0	7,219.3	6,728.3	6,439.0
- Printers	3,918.8	3,566.1	3,316.5	3,172.0	3,002.3	2,852.2
Computers and Peripherals	64,191.4	58,454.0	54,471.0	52,647.7	52,180.9	51,280.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

CNY million	2015	2016	2017	2018	2019	2020
Computers	179,103.2	166,147.8	159,236.0	158,385.8	162,490.3	166,739.3
- Desktops	37,985.5	34,376.9	32,658.0	31,389.1	28,982.5	25,832.5
- Portable Computers	141,117.7	131,770.9	126,577.9	126,996.8	133,507.8	140,906.8
-- Laptops	97,061.2	92,208.1	89,626.3	90,243.9	94,380.7	100,287.5
-- Tablets	44,056.5	39,562.8	36,951.6	36,752.9	39,127.2	40,619.3
Peripherals	17,029.7	15,697.8	14,554.7	13,881.8	13,123.4	12,725.5
- Monitors	11,260.4	10,528.5	9,845.5	9,463.5	9,016.0	8,885.9
- Printers	5,769.3	5,169.3	4,709.2	4,418.3	4,107.5	3,839.6
Computers and Peripherals	196,132.9	181,845.5	173,790.7	172,267.6	175,613.8	179,464.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.1	-3.8	-17.6
- Desktops	-13.6	-9.9	-40.8
- Portable Computers	1.4	-2.5	-11.9
-- Laptops	2.1	-2.2	-10.5
-- Tablets	0.4	-2.9	-13.7
Peripherals	-4.5	-6.8	-29.8
- Monitors	-4.3	-7.1	-30.9
- Printers	-5.0	-6.2	-27.2
Computers and Peripherals	-1.7	-4.4	-20.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	2.6	-1.4	-6.9
- Desktops	-10.9	-7.4	-32.0
- Portable Computers	5.5	0.0	-0.1
-- Laptops	6.3	0.7	3.3
-- Tablets	3.8	-1.6	-7.8
Peripherals	-3.0	-5.7	-25.3
- Monitors	-1.4	-4.6	-21.1
- Printers	-6.5	-7.8	-33.4
Computers and Peripherals	2.2	-1.8	-8.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	26,249.2	26,260.0	26,220.3	26,308.2	24,713.5	23,655.3
- Desktops	15,479.4	15,402.0	15,248.0	14,988.7	14,060.9	12,865.8
- Portable Computers	10,769.8	10,858.0	10,972.3	11,319.5	10,652.5	10,789.5
-- Laptops	7,447.2	7,618.5	7,603.2	7,748.3	7,593.3	7,684.4
-- Tablets	3,322.6	3,239.5	3,369.1	3,571.2	3,059.2	3,105.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

CNY million	2015	2016	2017	2018	2019	2020
Computers	89,268.0	88,019.0	86,829.8	88,379.6	84,562.5	83,046.3
- Desktops	55,000.4	53,900.4	52,828.3	52,843.2	50,266.4	47,373.5
- Portable Computers	34,267.7	34,118.7	34,001.6	35,536.4	34,296.1	35,672.7
-- Laptops	26,283.8	26,494.1	26,186.4	27,182.8	27,105.3	28,308.3
-- Tablets	7,983.8	7,624.5	7,815.2	8,353.6	7,190.8	7,364.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-4.3	-2.1	-9.9
- Desktops	-8.5	-3.6	-16.9
- Portable Computers	1.3	0.0	0.2
-- Laptops	1.2	0.6	3.2
-- Tablets	1.5	-1.3	-6.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.8	-1.4	-7.0
- Desktops	-5.8	-2.9	-13.9
- Portable Computers	4.0	0.8	4.1
-- Laptops	4.4	1.5	7.7
-- Tablets	2.4	-1.6	-7.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	15.6	17.3	18.6
Fixed	84.4	82.7	81.4
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	1.8	3.8	4.0	4.0	4.0	3.5
iOS	42.2	37.4	41.7	43.3	44.5	45.1
Android	55.9	58.7	54.3	52.7	51.5	51.3
BlackBerry OS	-	-	-	-	-	-
Other	0.0	-	-	-	0.0	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Lenovo (China) Ltd	18.1	18.7	19.7	20.1	20.1
Apple Computer (China) Inc	12.0	13.7	14.2	15.0	15.5
Huawei Technologies Co Ltd	5.9	7.0	8.3	9.8	11.1
Hewlett-Packard Asia-Pacific Ltd	8.5	8.8	9.3	9.4	9.8
Dell (China) Co Ltd	8.0	8.7	9.3	9.6	9.7
AsusTek Computer	5.0	4.8	4.9	4.9	4.8

(China) Inc					
Wuhan Admiral	4.5	4.1	3.7	3.9	3.9
Technology Co Ltd					
Xiaomi Technology Co Ltd	1.5	1.3	2.1	2.3	2.3
Canon (China) Inc	2.2	2.3	2.3	2.2	2.1
Acer Computer	2.7	2.7	2.6	2.4	2.1
(Shanghai) Ltd					
Samsung China	4.2	3.5	2.8	2.2	1.7
Electronics Co Ltd					
Philips China Co Ltd	1.6	1.6	1.7	1.7	1.7
HKC Group	1.4	1.5	1.6	1.6	1.6
Shenzhen Hasee Group Co	2.0	1.7	1.4	1.4	1.4
Ltd					
Tsinghua Tongfang Co Ltd	1.5	1.4	1.0	0.8	0.9
Epson Electronic	0.9	0.9	0.9	0.9	0.8
Technological					
Development (Shenzhen)					
Co Ltd					
ViewSonic Corp	0.9	0.9	0.9	0.8	0.8
Microsoft (China) Pte Ltd	0.5	0.6	0.6	0.7	0.6
LG Electronics (China)	0.6	0.6	0.6	0.6	0.6
Co Ltd					
Haier Group	0.8	0.8	0.7	0.5	0.4
Teclast Electronics Co	1.3	1.3	1.2	0.7	0.4
Ltd					
Shenzhen AlldoCube	0.3	0.3	0.3	0.3	0.2
Technology & Science Co					
Ltd					
Lexmark International	0.2	0.2	0.2	0.2	0.2
(China) Ltd					
Guangzhou Hedy Digital	0.2	0.2	0.1	0.1	0.0
Technology Co Ltd					
Onda Technology Corp	0.2	0.3	0.2	0.1	-
Colorful Technology &	0.3	0.1	-	-	-
Development Co Ltd					
Toshiba (China) Co Ltd	0.3	0.1	-	-	-
Benq (China) Ltd	-	-	-	-	-
China Great Wall	-	-	-	-	-
Computer Group Co Ltd					
Beijing Yi Ren Yi Ben	-	-	-	-	-
Information Technology					
Co Ltd					
Others	14.4	12.0	9.3	8.0	7.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume					
Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Lenovo (Lenovo Group Ltd)	Lenovo (China) Ltd	18.7	19.7	20.1	20.1
iPad (Apple Inc)	Apple Computer (China) Inc	11.8	12.3	13.2	13.7
Huawei	Huawei Technologies Co Ltd	7.0	8.3	9.8	11.1
HP (HP Inc)	Hewlett-Packard Asia-Pacific Ltd	8.8	9.3	9.4	9.8
Dell (Dell)	Dell (China) Co Ltd	8.7	9.3	9.6	9.7

Technologies Inc)					
Asus (AsusTek Computer Inc)	AsusTek Computer (China) Inc	4.8	4.9	4.9	4.8
AOC (TPV Technology Ltd)	Wuhan Admiral Technology Co Ltd	4.1	3.7	3.9	3.9
Xiaomi (Xiaomi Corp)	Xiaomi Technology Co Ltd	1.3	2.1	2.3	2.3
Canon (Canon Inc)	Canon (China) Inc	2.3	2.3	2.2	2.1
Acer (Acer Inc)	Acer Computer (Shanghai) Ltd	2.7	2.6	2.4	2.1
MacBook (Apple Inc)	Apple Computer (China) Inc	1.7	1.7	1.7	1.7
Samsung (Samsung Corp)	Samsung China Electronics Co Ltd	3.3	2.6	2.1	1.7
Philips (Koninklijke Philips NV)	Philips China Co Ltd	1.6	1.7	1.7	1.7
HKC	HKC Group	1.5	1.6	1.6	1.6
Hasee	Shenzhen Hasee Group Co Ltd	1.7	1.4	1.4	1.4
Epson (Seiko Epson Corp)	Epson Electronic Technological Development (Shenzhen) Co Ltd	0.9	0.9	0.9	0.8
Viewsonic	ViewSonic Corp	0.9	0.9	0.8	0.8
Microsoft Surface (Microsoft Corp)	Microsoft (China) Pte Ltd	0.6	0.6	0.7	0.6
LG (LG Corp)	LG Electronics (China) Co Ltd	0.6	0.6	0.6	0.6
Mechrevo	Tsinghua Tongfang Co Ltd	0.1	0.2	0.3	0.5
Haier	Haier Group	0.8	0.7	0.5	0.4
Teclast	Teclast Electronics Co Ltd	1.3	1.2	0.7	0.4
Tsinghua Tongfang Cube	Tsinghua Tongfang Co Ltd	1.2	0.7	0.4	0.4
	Shenzhen AlldoCube Technology & Science Co Ltd	0.3	0.3	0.3	0.2
Lexmark (Apex Technology Co Ltd)	Lexmark International (China) Ltd	0.2	0.2	0.2	0.2
Mac (Apple Inc)	Apple Computer (China) Inc	0.3	0.2	0.1	0.1
Eben	Tsinghua Tongfang Co Ltd	0.1	0.1	0.1	0.1
Samsung (HP Inc)	Samsung China Electronics Co Ltd	0.2	0.1	0.1	0.0
Hedy	Guangzhou Hedy Digital Technology Co Ltd	0.2	0.1	0.1	0.0
Onda	Onda Technology Corp	0.3	0.2	0.1	-
Others	Others	12.2	9.3	8.0	7.1
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	62.1	60.1	57.9	56.1	54.3	47.1
- Grocery Retailers	3.4	3.2	3.0	2.8	2.6	2.1
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	3.4	3.2	3.0	2.8	2.6	2.1
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery	-	-	-	-	-	-

Retailers						
- Non-Grocery Specialists	53.6	52.0	50.3	48.9	47.5	41.5
-- Electronics and Appliance Specialist Retailers	53.6	52.0	50.3	48.9	47.5	41.5
-- Other Non-Grocery Specialists	-	-	-	0.0	-	-
- Mixed Retailers	5.1	4.9	4.6	4.4	4.2	3.5
Non-Store Retailing	37.9	39.9	42.1	43.9	45.7	53.0
- Direct Selling	-	-	-	-	-	-
- Homeshopping	1.4	1.4	1.4	1.4	1.4	1.2
- E-Commerce	36.5	38.5	40.7	42.5	44.3	51.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	41,989.0	40,985.0	40,036.6	39,132.9	38,264.2	37,422.1
- Desktops	5,983.7	5,756.3	5,497.3	5,203.7	4,873.4	4,504.8
- Portable Computers	36,005.3	35,228.7	34,539.3	33,929.2	33,390.8	32,917.3
-- Laptops	20,462.0	20,011.8	19,611.6	19,256.8	18,943.2	18,667.0
-- Tablets	15,543.3	15,216.9	14,927.7	14,672.4	14,447.6	14,250.3
Peripherals	9,291.2	8,890.3	8,527.2	8,199.0	7,903.0	7,636.4
- Monitors	6,439.0	6,175.0	5,934.1	5,714.2	5,513.6	5,330.4
- Printers	2,852.2	2,715.3	2,593.1	2,484.8	2,389.4	2,306.0
Computers and Peripherals	51,280.2	49,875.2	48,563.8	47,331.9	46,167.2	45,058.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

CNY million	2020	2021	2022	2023	2024	2025
Computers	166,739.3	163,890.1	161,067.7	158,082.7	155,045.4	151,965.2
- Desktops	25,832.5	24,980.6	23,923.3	22,670.8	21,240.0	19,637.5
- Portable Computers	140,906.8	138,909.5	137,144.4	135,411.9	133,805.3	132,327.7
-- Laptops	100,287.5	99,091.4	98,022.4	96,941.8	95,914.7	94,946.4
-- Tablets	40,619.3	39,818.0	39,121.9	38,470.2	37,890.6	37,381.3
Peripherals	12,725.5	12,069.4	11,490.6	10,964.0	10,490.6	10,064.7
- Monitors	8,885.9	8,549.7	8,244.0	7,955.3	7,687.7	7,440.1
- Printers	3,839.6	3,519.7	3,246.5	3,008.7	2,802.9	2,624.6
Computers and Peripherals	179,464.8	175,959.4	172,558.2	169,046.7	165,535.9	162,030.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total

Computers	-2.4	-2.3	-10.9
- Desktops	-3.8	-5.5	-24.7
- Portable Computers	-2.2	-1.8	-8.6
-- Laptops	-2.2	-1.8	-8.8
-- Tablets	-2.1	-1.7	-8.3
Peripherals	-4.3	-3.8	-17.8
- Monitors	-4.1	-3.7	-17.2
- Printers	-4.8	-4.2	-19.1
Computers and Peripherals	-2.7	-2.6	-12.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-1.7	-1.8	-8.9
- Desktops	-3.3	-5.3	-24.0
- Portable Computers	-1.4	-1.2	-6.1
-- Laptops	-1.2	-1.1	-5.3
-- Tablets	-2.0	-1.6	-8.0
Peripherals	-5.2	-4.6	-20.9
- Monitors	-3.8	-3.5	-16.3
- Printers	-8.3	-7.3	-31.6
Computers and Peripherals	-2.0	-2.0	-9.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	23,655.3	23,452.1	23,208.3	22,910.6	22,554.7	22,137.8
- Desktops	12,865.8	12,544.1	12,167.8	11,732.0	11,232.7	10,667.6
- Portable Computers	10,789.5	10,908.0	11,040.5	11,178.7	11,322.0	11,470.2
-- Laptops	7,684.4	7,768.7	7,872.3	7,986.1	8,109.3	8,241.2
-- Tablets	3,105.1	3,139.2	3,168.2	3,192.6	3,212.7	3,229.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

CNY million	2020	2021	2022	2023	2024	2025
Computers	83,046.3	81,762.7	80,244.8	78,346.4	76,130.8	73,620.7
- Desktops	47,373.5	45,972.1	44,321.0	42,354.7	40,112.1	37,612.6
- Portable Computers	35,672.7	35,790.5	35,923.8	35,991.8	36,018.7	36,008.1
-- Laptops	28,308.3	28,484.4	28,688.0	28,844.8	28,971.9	29,070.7
-- Tablets	7,364.4	7,306.2	7,235.8	7,147.0	7,046.7	6,937.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-0.9	-1.3	-6.4
- Desktops	-2.5	-3.7	-17.1
- Portable Computers	1.1	1.2	6.3
-- Laptops	1.1	1.4	7.2
-- Tablets	1.1	0.8	4.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	-1.5	-2.4	-11.3
- Desktops	-3.0	-4.5	-20.6
- Portable Computers	0.3	0.2	0.9
-- Laptops	0.6	0.5	2.7
-- Tablets	-0.8	-1.2	-5.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	18.6	20.0	21.3	22.6	23.9	25.1
Fixed	81.4	80.0	78.7	77.4	76.1	74.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	3.5	3.2
iOS	45.1	45.5
Android	51.3	51.3
BlackBerry OS	-	-
Other	-	0.0
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in India

Euromonitor International

September 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Increased home usage fails to generate growth	1
Targeting growing demand for gaming devices	1
Hewlett-Packard works to bolster leading position	2
RECOVERY AND OPPORTUNITIES	2
Poor outlook for computers and peripherals	2
Gaming remains A potential bright spot.....	2
Ongoing shift towards e-commerce	2
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	3
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	4
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	4
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	4
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015- 2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	5
Table 10 Sales of Tablets by Operating System 2015-2020	5
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	5
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017- 2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	7
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020- 2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	9
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	10
Table 23 Forecast Sales of Tablets by Operating System 2020-2021	10

COMPUTERS AND PERIPHERALS IN INDIA

KEY DATA FINDINGS

- Working from home and home schooling during the COVID-19 lockdown fail to generate growth
- Computers and peripherals sees retail volumes fall by 6% in 2020 to reach 9.2 million units
- Laptops sees slight positive impact from increased working from home and home-schooling, as retail volumes decline by less than 4% in 2020
- Hewlett-Packard India Sales Pvt Ltd is the leading player in 2020, with a 21% volume share
- Computers and peripherals is forecast to register a -7% volume CAGR over 2020-2025 to reach 6.3 million units

2020 IMPACT

Increased home usage fails to generate growth

The closure of non-essential stores, disruptions to imports from China and economic uncertainty have served to drive down sales of computers and peripherals even as enforced working from home and home-schooling have led to increased domestic usage of such devices. The business-to-business segment saw a significant increase in demand in the first quarter of the year as companies were forced to shut down and asked employees to work from home.

Targeting growing demand for gaming devices

Gaming devices, including laptops, desktops, and monitors, are seeing a significant rise in demand, which has been bolstered by lockdown, as consumers have turned to gaming to pass hours of enforced home seclusion. Indeed, lockdown has both encouraged established gamers to play more often and introduced new consumers to gaming. In addition, the prevalence of smartphones has introduced many consumers to mobile gaming and many of these consumers are being encouraged to move to more sophisticated gaming options on PCs and laptops. Again, the COVID-19 lockdown has strengthened this trend. There is now a large section of casual gamers who are willing to upgrade to a gaming laptop when provided with affordable options. Apart from an expanded range of devices, providing options like equated monthly instalment (EMI) payment has also helped to persuade consumers to buy gaming devices.

Numerous companies, including Asus, Dell, and Lenovo, are ramping up efforts to expand their gaming portfolios and engage with, and help to expand, the gaming community. Asus, for example, has expanded the ROG Zephyrus series (for gamers and content creators) and launched ROG Strix Scar III and Hero III (designed for pro-level competitive play). The new units will be priced between INR60,000 and INR300,000. In addition, Dell launched the Alienware M15 R3, G5 15 SE, G5 15, G3 15 gaming laptops in July 2020. The Alienware M15 R3 starts at INR199,990, while the Dell G5 15 SE will be available for INR74,990, the Dell G5 15 will cost INR82,590 and the Dell G3 15 will start at INR73,990.

Hewlett-Packard works to bolster leading position

Hewlett-Packard India Sales Pvt Ltd remains the largest player in computers and peripherals thanks to strong brand equity and extensive distribution. During 2020, the company looked to strengthen its offer with the launch of two new laptop models: Omen 15 and HP Pavilion Gaming 16. The Omen 15 comes with a revised frame and a new Omen logo, while the Pavilion Gaming 16 is Hewlett-Packard's first 16-inch gaming laptop. The company has introduced two processor variants in both the laptop models. The Pavilion gaming portfolio is expected to be aggressively priced at INR70,000.

In addition, Hewlett-Packard has started manufacturing desktops and workstations at the Flex's facility in Sriperumbudur near Chennai. The company says this expansion is part of its long-term commitment to the Indian market and its efforts to serve its partners and customers better. The facility's location provides access to a nearby port and Hewlett-Packard's spare parts facility in Bengaluru. According to the company, this, in turn, enables it to procure materials from other parts of India and from Asia more quickly and efficiently.

Hewlett-Packard faces growing competition in computers and peripherals, with Mi launching the Mi Notebook laptop in June 2020 and Honor introducing the Honor MagicBook 15 in August. Moreover, Realme India's CEO has suggested that Realme laptops could soon be launched in the Indian market.

RECOVERY AND OPPORTUNITIES

Poor outlook for computers and peripherals

Computers and peripherals is expected to see volumes continue to fall year-on-year throughout the forecast period. The increasing prevalence of smartphones, and their increasingly diverse functionalities and usage, are set to continue to exert a negative impact on sales of laptops and desktops. Furthermore, the challenging economic environment resulting from measures aimed at limiting the spread of COVID-19, which will involve job losses and reduced consumer spending power, is set to undermine demand.

Gaming remains A potential bright spot

Gaming will continue to represent a potential bright spot for computers and peripherals players during the forecast period. Indeed, the COVID-19 lockdown has strengthened the importance of gaming, reinforcing established gamers' commitment to the pastime and, notably, expanding the range of consumers engaged in gaming, with many people turning to gaming for the first time to entertain themselves during the period of home seclusion. Gaming is also a segment that has the potential to benefit from the increasingly central role of smartphones in consumers' everyday lives, as the growing popularity of mobile gaming encourages increasing numbers of people to move up to more sophisticated gaming options on laptops and PCs. Manufacturer innovation targeting the gaming segment will also spur demand during the forecast period. Retailers are also increasingly targeting gamers, with Amazon kicking off its Grand Gaming Days in July 2020, which offered consumers discounts of up to 50% on gaming gadgets including laptops, TVs, and video game consoles, as well as offers such as no-cost EMI schemes and instant bank discounts.

Ongoing shift towards e-commerce

COVID-19 has bolstered an existing trend towards e-commerce in computers and peripherals, as restrictions on the operations of non-essential physical retail outlets and consumer concerns about contracting the coronavirus have undermined store-based sales. E-commerce is set to

see a significant rise in its share of computers and peripherals volumes in 2020, with online retailer, Flipkart, seeing overall laptop searches more than double from March, with high-performance laptops proving to be the most popular search. The trend towards e-commerce is expected to continue during the forecast period as consumers appreciate the convenience of shopping online and concerns about COVID-19 infection persist. Consumers are also drawn to the opportunity to compare prices and gain good deals online, which is set to be an important factor in the difficult economic conditions prevailing as a result of lockdown.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	8,051.7	7,309.7	6,814.2	6,481.7	6,118.0	5,761.8
- Desktops	1,085.8	933.8	816.1	771.5	729.1	678.1
- Portable Computers	6,965.9	6,375.8	5,998.2	5,710.2	5,388.9	5,083.7
-- Laptops	4,302.2	3,872.0	3,639.3	3,485.3	3,333.4	3,209.9
-- Tablets	2,663.7	2,503.9	2,358.9	2,224.9	2,055.5	1,873.9
Peripherals	4,587.2	4,377.0	4,181.1	3,959.4	3,727.8	3,473.1
- Monitors	2,189.0	2,097.0	1,999.1	1,889.2	1,765.6	1,644.3
- Printers	2,398.2	2,280.0	2,182.0	2,070.2	1,962.2	1,828.8
Computers and Peripherals	12,638.9	11,686.7	10,995.3	10,441.1	9,845.7	9,234.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

INR million	2015	2016	2017	2018	2019	2020
Computers	207,949.6	188,992.0	178,829.3	175,251.4	171,568.5	165,530.2
- Desktops	22,806.0	20,662.2	18,537.4	17,943.3	17,069.5	16,065.8
- Portable Computers	185,143.7	168,329.7	160,291.9	157,308.1	154,499.0	149,464.4
-- Laptops	150,975.3	137,236.5	132,282.0	131,778.8	130,935.4	128,028.6
-- Tablets	34,168.4	31,093.2	28,009.9	25,529.3	23,563.6	21,435.8
Peripherals	27,778.6	25,858.3	26,096.0	24,718.2	23,140.6	21,302.4
- Monitors	17,012.6	16,298.1	15,840.8	15,180.5	14,310.7	13,287.5
- Printers	10,766.0	9,560.2	10,255.2	9,537.6	8,829.9	8,014.9
Computers and Peripherals	235,728.3	214,850.3	204,925.3	199,969.6	194,709.1	186,832.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-5.8	-6.5	-28.4
- Desktops	-7.0	-9.0	-37.6
- Portable Computers	-5.7	-6.1	-27.0
-- Laptops	-3.7	-5.7	-25.4

-- Tablets	-8.8	-6.8	-29.7
Peripherals	-6.8	-5.4	-24.3
- Monitors	-6.9	-5.6	-24.9
- Printers	-6.8	-5.3	-23.7
Computers and Peripherals	-6.2	-6.1	-26.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-3.5	-4.5	-20.4
- Desktops	-5.9	-6.8	-29.6
- Portable Computers	-3.3	-4.2	-19.3
-- Laptops	-2.2	-3.2	-15.2
-- Tablets	-9.0	-8.9	-37.3
Peripherals	-7.9	-5.2	-23.3
- Monitors	-7.2	-4.8	-21.9
- Printers	-9.2	-5.7	-25.6
Computers and Peripherals	-4.0	-4.5	-20.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	5,589.9	4,940.2	4,450.1	4,088.3	3,794.9	3,611.1
- Desktops	2,221.7	1,977.3	1,788.7	1,638.1	1,511.5	1,421.6
- Portable Computers	3,368.2	2,962.9	2,661.4	2,450.3	2,283.4	2,189.4
-- Laptops	2,600.0	2,210.0	1,912.8	1,695.8	1,523.8	1,425.9
-- Tablets	768.2	752.9	748.7	754.4	759.6	763.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

INR million	2015	2016	2017	2018	2019	2020
Computers	130,487.0	110,240.0	99,031.1	90,357.8	82,690.1	78,019.4
- Desktops	42,573.2	33,668.6	31,028.6	28,764.4	26,631.2	24,972.1
- Portable Computers	87,913.8	76,571.4	68,002.4	61,593.4	56,058.9	53,047.3
-- Laptops	79,318.1	69,034.0	61,178.9	55,200.5	50,048.4	47,376.9
-- Tablets	8,595.7	7,537.3	6,823.6	6,392.8	6,010.6	5,670.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Computers	-4.8	-8.4	-35.4
- Desktops	-5.9	-8.5	-36.0
- Portable Computers	-4.1	-8.3	-35.0
-- Laptops	-6.4	-11.3	-45.2
-- Tablets	0.5	-0.1	-0.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp

	2019/20	2015-20 CAGR	2015/20 Total
Computers	-5.6	-9.8	-40.2
- Desktops	-6.2	-10.1	-41.3
- Portable Computers	-5.4	-9.6	-39.7
-- Laptops	-5.3	-9.8	-40.3
-- Tablets	-5.7	-8.0	-34.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume

	2018	2019	2020
Convertible	9.4	10.8	12.6
Fixed	90.6	89.2	87.4
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume

	2015	2016	2017	2018	2019	2020
Windows	8.3	9.1	9.7	10.3	11.8	12.1
iOS	10.1	9.6	9.7	9.8	10.7	11.3
Android	81.6	81.3	80.6	79.9	77.5	76.6
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume

Company	2016	2017	2018	2019	2020

Hewlett-Packard India Sales Pvt Ltd	18.7	20.2	20.4	20.8	21.2
Dell India Pvt Ltd	9.8	9.7	9.7	9.6	9.7
Lenovo India Pvt Ltd	9.9	9.5	9.2	9.0	9.0
Samsung India Electronics Pvt Ltd	10.0	8.6	8.6	8.5	8.6
Acer India (Pvt) Ltd	8.7	8.6	8.4	8.4	8.3
LG Electronics India Pvt Ltd	4.4	4.7	5.1	5.3	5.4
Epson India Pvt Ltd	4.2	4.3	4.3	4.5	4.6
Canon India Pvt Ltd	3.6	3.7	3.8	3.9	4.0
Micromax Informatics Ltd	4.1	4.1	3.9	3.6	3.2
Apple India Pte Ltd	2.8	2.8	2.8	2.9	3.0
Asus Technology Pvt Ltd	1.9	2.1	2.2	2.4	2.6
HCL Infosystems Ltd	2.3	2.3	2.3	2.2	2.2
TPV Technology India Pvt Ltd	2.5	2.4	2.3	2.2	2.1
iball India Pvt Ltd	1.7	1.8	1.8	1.8	1.9
Karbonn Mobile India Pvt Ltd	1.5	1.5	1.5	1.4	1.2
Toshiba India Pvt Ltd	0.9	1.0	1.0	1.0	1.0
Zenith Computers Ltd	0.7	0.7	0.7	0.6	0.6
Lava International Ltd	0.6	0.6	0.5	0.5	0.4
Intex Technologies (India) Ltd	0.3	0.3	0.3	0.3	0.3
Sony India Pvt Ltd	-	-	-	-	-
Sahara Computers & Electronics Ltd	-	-	-	-	-
Wipro Infotech	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-
Others	11.5	11.1	11.4	10.8	10.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard India Sales Pvt Ltd	18.9	19.0	19.6	20.0
Dell (Dell Technologies Inc)	Dell India Pvt Ltd	9.7	9.7	9.6	9.7
Lenovo (Lenovo Group Ltd)	Lenovo India Pvt Ltd	9.5	9.2	9.0	9.0
Samsung (Samsung Corp)	Samsung India Electronics Pvt Ltd	8.6	8.6	8.5	8.6
Acer (Acer Inc)	Acer India (Pvt) Ltd	8.6	8.4	8.4	8.3
LG (LG Corp)	LG Electronics India Pvt Ltd	4.7	5.1	5.3	5.4
Epson (Seiko Epson Corp)	Epson India Pvt Ltd	4.3	4.3	4.5	4.6
Canon (Canon Inc)	Canon India Pvt Ltd	3.7	3.8	3.9	4.0
Micromax	Micromax Informatics Ltd	4.1	3.9	3.6	3.2
Asus (AsusTek Computer Inc)	Asus Technology Pvt Ltd	2.1	2.2	2.4	2.6
iPad (Apple Inc)	Apple India Pte Ltd	2.1	2.1	2.2	2.3

HCL	HCL Infosystems Ltd	2.3	2.3	2.2	2.2
AOC (TPV Technology Ltd)	TPV Technology India Pvt Ltd	2.4	2.3	2.2	2.1
iBall Slide	iball India Pvt Ltd	1.8	1.8	1.8	1.9
Karbonn	Karbonn Mobile India Pvt Ltd	1.5	1.5	1.4	1.2
Samsung (HP Inc)	Hewlett-Packard India Sales Pvt Ltd	1.4	1.3	1.3	1.2
Toshiba (Toshiba Corp)	Toshiba India Pvt Ltd	1.0	1.0	1.0	1.0
Mac (Apple Inc)	Apple India Pte Ltd	0.7	0.7	0.7	0.7
Zenith	Zenith Computers Ltd	0.7	0.7	0.6	0.6
Lava	Lava International Ltd	0.6	0.5	0.5	0.4
Intex	Intex Technologies (India) Ltd	0.3	0.3	0.3	0.3
Dell (Dell Inc)	Dell India Pvt Ltd	-	-	-	-
Compaq (Hewlett-Packard Development Co LP)	Hewlett-Packard India Sales Pvt Ltd	-	-	-	-
HP (Hewlett-Packard Development Co LP)	Hewlett-Packard India Sales Pvt Ltd	-	-	-	-
Blackberry	Research in Motion Ltd	-	-	-	-
Sahara (Sahara Computers (Pty) Ltd)	Sahara Computers & Electronics Ltd	-	-	-	-
Sony Vaio (Sony Corp)	Sony India Pvt Ltd	-	-	-	-
Vaio (Vaio Corp)	Sony India Pvt Ltd	-	-	-	-
Wipro (Wipro Ltd)	Wipro Infotech	-	-	-	-
Others	Others	11.1	11.4	10.8	10.8
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	92.9	90.4	87.0	85.4	82.1	77.9
- Grocery Retailers	2.4	2.8	3.1	3.0	3.0	3.4
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	2.4	2.8	3.1	3.0	3.0	3.4
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	90.5	87.6	83.9	82.4	79.1	74.5
-- Electronics and Appliance Specialist Retailers	90.5	87.6	83.9	82.4	79.1	74.5
-- Other Non-Grocery Specialists	-	-	-	-	-	-
- Mixed Retailers	-	-	-	-	-	-
Non-Store Retailing	7.1	9.6	13.0	14.6	17.9	22.1
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	7.1	9.6	13.0	14.6	17.9	22.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	5,761.8	5,362.3	5,005.7	4,652.0	4,303.8	3,973.6
- Desktops	678.1	626.1	574.7	522.4	468.4	416.5
- Portable Computers	5,083.7	4,736.3	4,431.0	4,129.6	3,835.4	3,557.2
-- Laptops	3,209.9	3,060.3	2,913.4	2,767.1	2,621.9	2,478.5
-- Tablets	1,873.9	1,676.0	1,517.6	1,362.5	1,213.5	1,078.7
Peripherals	3,473.1	3,223.1	2,977.4	2,742.3	2,514.8	2,300.1
- Monitors	1,644.3	1,528.4	1,417.9	1,313.0	1,212.4	1,116.7
- Printers	1,828.8	1,694.8	1,559.5	1,429.3	1,302.4	1,183.3
Computers and Peripherals	9,234.9	8,585.5	7,983.1	7,394.3	6,818.5	6,273.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

INR million	2020	2021	2022	2023	2024	2025
Computers	165,530.2	152,190.9	139,341.5	127,090.6	115,226.9	104,367.1
- Desktops	16,065.8	14,425.0	12,880.8	11,433.4	10,087.6	8,870.1
- Portable Computers	149,464.4	137,765.9	126,460.7	115,657.2	105,139.2	95,497.1
-- Laptops	128,028.6	119,310.7	110,801.4	102,489.6	94,274.6	86,589.0
-- Tablets	21,435.8	18,455.2	15,659.3	13,167.6	10,864.7	8,908.1
Peripherals	21,302.4	18,744.6	16,426.4	14,362.2	12,536.8	10,916.8
- Monitors	13,287.5	11,790.3	10,416.4	9,183.0	8,082.8	7,096.4
- Printers	8,014.9	6,954.3	6,010.0	5,179.2	4,454.0	3,820.4
Computers and Peripherals	186,832.6	170,935.5	155,767.9	141,452.8	127,763.7	115,283.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-6.9	-7.2	-31.0
- Desktops	-7.7	-9.3	-38.6
- Portable Computers	-6.8	-6.9	-30.0
-- Laptops	-4.7	-5.0	-22.8
-- Tablets	-10.6	-10.5	-42.4
Peripherals	-7.2	-7.9	-33.8
- Monitors	-7.0	-7.4	-32.1
- Printers	-7.3	-8.3	-35.3
Computers and Peripherals	-7.0	-7.4	-32.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-8.1	-8.8	-36.9
- Desktops	-10.2	-11.2	-44.8
- Portable Computers	-7.8	-8.6	-36.1
-- Laptops	-6.8	-7.5	-32.4
-- Tablets	-13.9	-16.1	-58.4
Peripherals	-12.0	-12.5	-48.8
- Monitors	-11.3	-11.8	-46.6
- Printers	-13.2	-13.8	-52.3
Computers and Peripherals	-8.5	-9.2	-38.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	3,611.1	3,448.4	3,303.2	3,158.0	3,003.0	2,842.5
- Desktops	1,421.6	1,343.4	1,273.3	1,202.6	1,126.2	1,047.6
- Portable Computers	2,189.4	2,105.0	2,029.9	1,955.4	1,876.8	1,794.9
-- Laptops	1,425.9	1,338.3	1,260.7	1,184.7	1,105.3	1,023.9
-- Tablets	763.6	766.6	769.2	770.7	771.5	770.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

INR million	2020	2021	2022	2023	2024	2025
Computers	78,019.4	70,851.7	64,593.1	58,665.3	53,090.2	47,872.4
- Desktops	24,972.1	22,505.5	20,290.3	18,259.0	16,365.2	14,610.9
- Portable Computers	53,047.3	48,346.3	44,302.8	40,406.3	36,724.9	33,261.5
-- Laptops	47,376.9	43,206.1	39,673.5	36,252.8	33,020.5	29,968.1
-- Tablets	5,670.4	5,140.2	4,629.3	4,153.5	3,704.4	3,293.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-4.5	-4.7	-21.3
- Desktops	-5.5	-5.9	-26.3
- Portable Computers	-3.9	-3.9	-18.0
-- Laptops	-6.1	-6.4	-28.2
-- Tablets	0.4	0.2	1.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-9.2	-9.3	-38.6
- Desktops	-9.9	-10.2	-41.5
- Portable Computers	-8.9	-8.9	-37.3
-- Laptops	-8.8	-8.8	-36.7
-- Tablets	-9.4	-10.3	-41.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	12.6	14.9	16.3	18.4	21.9	24.5
Fixed	87.4	85.1	83.7	81.6	78.1	75.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	12.1	12.7
iOS	11.3	11.6
Android	76.6	75.8
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Germany

Euromonitor International

October 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
German consumers' preparation for lockdown A boon for retail sales.....	1
COVID-19 has A positive impact on B2B sales of computers.....	1
Computer manufacturers struggle to meet the extra demand.....	2
RECOVERY AND OPPORTUNITIES	2
HP, Canon and Apple continue to lead the competitive landscape for computers and peripherals	2
What is happening once the home office is updated?	2
Future opportunities.....	2
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	3
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	4
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	4
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	4
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	5
Table 10 Sales of Tablets by Operating System 2015-2020	5
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	5
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	7
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	9
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	10

Table 23	Forecast Sales of Tablets by Operating System 2020-2021	10

COMPUTERS AND PERIPHERALS IN GERMANY

KEY DATA FINDINGS

- Temporary spike in sales of computers and peripherals as consumers work and study from home due to the COVID-19 pandemic in 2020
- Retail volume sales of computer and peripherals decrease by 4% to 13.3 million units in 2020
- Laptops records the fastest volume growth of 1% in 2020
- HP, Canon and Apple lead computers and peripherals with 13%, 9% and 9% respective volume shares in 2020
- Retail volume sales of computers and peripherals are expected to record a negative 3% CAGR over the forecast period

2020 IMPACT

German consumers' preparation for lockdown A boon for retail sales

With the introduction of isolation and quarantine measures in early March 2020 in Germany to try and contain the spread of COVID-19, the German consumer needed to adapt to a “new normal” – home schooling and working from home. Germany, which is known for its relatively reluctant adoption of the digitised world, had to suddenly prepare for this from one moment to the next. Retail sales of certain products in computers and peripherals experienced a spike at this time, not just from the replacement of existing products, but also the purchases of new products, such as monitors, for those trying to replicate the office set-up of having a “second screen”, as well as lower-priced products to assist with home schooling. However, this immediate spike in demand at the start of the shutdown was inevitably expected to be offset by depressed demand in the second half of the year, with some purchases simply having been brought forward to the second quarter of 2020 that would otherwise have been made later in the year. Laptops is expected to see the most positive impact, returning to positive volume growth in 2020. Monitors, which was already recording positive retail volume growth before the arrival of COVID-19, will see slightly faster growth in 2020, while printers will record a slightly slower decline as some consumers decided to replace their older printers due to home working and schooling, or bought a printer for the first time. Tablets and desktop sales were less affected – continuing their declining trajectory – because of their more specific usage.

COVID-19 has A positive impact on B2B sales of computers

Inevitably, with a number of businesses sending their white-collar workers home to work, B2B volume sales of laptops and tablets went up in the second quarter of 2020. This immediate spike in demand in Germany was expected to be offset somewhat by the performance in the second half of the year, but growth will still be positive for the overall year in 2020. The public sector, such as schools or government institutions, was especially lagging behind when it comes to in-home digital equipment. These institutions had to react to the lockdown as soon as possible when it occurred, trying to equip their staff or students with laptops, tablets and printers. Desktop sales continued to decline, with the switch from desktop to laptop purchases in the B2B environment being accelerated by the pandemic. Prior to 2020, B2B laptop sales were

already brisk, and 2020 will see stronger volume growth leading into the next few years as home office practices become more of a norm.

Computer manufacturers struggle to meet the extra demand

In recent years, the German retail and B2B computer sales have been stable and consolidated, with a generally negative trajectory due to high penetration and long replacement rates. The COVID-19 pandemic in 2020 triggered a spike in demand, leading to product shortages on a global scale for computer manufacturers, which was also affecting players' ability to meet consumer demand in Germany. In addition, the supply side was disrupted by COVID-19 as production facilities were largely at a standstill over the quarantine periods. The initial blessing of excess demand turned into a little bit of a curse due to the extra demand, which manufacturers and retailers struggled to meet, thus resulting in lower sales than could have potentially been seen in 2020.

RECOVERY AND OPPORTUNITIES

HP, Canon and Apple continue to lead the competitive landscape for computers and peripherals

In overall computers and peripherals, HP continues to firmly sit in the leading position thanks to a good mix of computers and peripherals, while Canon will overtake Apple to take the second ranking in 2020 due to the positive performance of its printer sales during the COVID-19 pandemic, while Apple's share weakened due to declining computer sales.

When looking just at computers, the leadership landscape is slightly different, with Apple still the number one player in 2020, ahead of Samsung, with both continuing to see declining sales. Samsung's sales were already declining in recent years, with Lenovo eating into its share. However, Apple's share has been falling in 2020 after years of growing share levels for this player. Apple has been affected by COVID-19 in 2020, due to the number of consumers postponing replacement purchases, particularly as its annual September product launch did not include any significant product innovation to encourage consumers to buy a new Apple computer. Another impact of COVID-19 specific to 2020 is that lower-priced solution providers such as Dell and Lenovo might have been benefiting from the potential shift in consumer behaviour due to the economic consequences of the pandemic in the short term.

What is happening once the home office is updated?

Once German consumers had updated their home office and schooling environment with printers, computers and laptops, this initial sales drive was expected to fall away again in the second half of 2020. The reason for this is that people who have already fitted out their home office or schooling environment are unlikely to make any more new purchases from computers and peripherals in the immediate future due to the general economic uncertainty. Nonetheless, computers is expected to continue to see positive growth in the coming years in Germany, as the "new normal" of more frequent home office working will lead to consumers who have not yet decided, up to now, to replace their existing products in 2020 being likely to do so in the immediate years post-COVID-19.

Future opportunities

Even prior to 2020, the mature status of computers and peripheral in Germany due to the high penetration rate of most of the devices meant that volume sales were already continuously declining. Going into the forecast period, despite the temporary spike in products such as

laptops, with the shift towards more home working, and monitors maintaining its steady growth, overall retail volume sales will still continue declining in computers and peripherals. Based on this backdrop, the adoption of long-term sustainability strategies, moving away from “maximisation” approaches, might represent one opportunity for future growth. In other words, computer companies could stop trying to maximise sales at any costs, instead focusing on services that improve consumers’ lives, for example through software improvements.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	12,935.2	11,145.3	9,671.7	9,173.5	8,780.6	8,311.5
- Desktops	1,339.7	1,148.7	993.1	902.6	832.2	769.8
- Portable Computers	11,595.5	9,996.7	8,678.6	8,270.9	7,948.4	7,541.7
-- Laptops	5,325.4	4,913.2	4,367.9	4,175.7	4,139.8	4,197.8
-- Tablets	6,270.1	5,083.5	4,310.8	4,095.2	3,808.6	3,343.9
Peripherals	5,151.8	5,054.9	5,116.9	5,067.1	5,010.5	4,971.2
- Monitors	1,315.0	1,348.5	1,379.0	1,392.8	1,409.7	1,428.0
- Printers	3,836.8	3,706.4	3,737.9	3,674.3	3,600.9	3,543.2
Computers and Peripherals	18,087.0	16,200.2	14,788.6	14,240.7	13,791.1	13,282.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	5,507.5	4,918.0	4,635.3	4,640.4	4,635.6	4,513.8
- Desktops	809.1	684.0	643.0	596.2	560.9	505.6
- Portable Computers	4,698.4	4,234.0	3,992.3	4,044.2	4,074.7	4,008.2
-- Laptops	2,965.5	2,811.3	2,738.2	2,833.7	2,929.0	3,006.7
-- Tablets	1,732.9	1,422.7	1,254.1	1,210.5	1,145.7	1,001.4
Peripherals	725.1	747.6	754.4	744.6	727.7	716.2
- Monitors	272.9	294.6	305.7	306.6	300.4	296.1
- Printers	452.3	453.0	448.7	438.0	427.2	420.2
Computers and Peripherals	6,232.6	5,665.6	5,389.6	5,384.9	5,363.3	5,230.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-5.3	-8.5	-35.7
- Desktops	-7.5	-10.5	-42.5
- Portable Computers	-5.1	-8.2	-35.0
-- Laptops	1.4	-4.6	-21.2
-- Tablets	-12.2	-11.8	-46.7
Peripherals	-0.8	-0.7	-3.5

- Monitors	1.3	1.7	8.6
- Printers	-1.6	-1.6	-7.7
Computers and Peripherals	-3.7	-6.0	-26.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-2.6	-3.9	-18.0
- Desktops	-9.9	-9.0	-37.5
- Portable Computers	-1.6	-3.1	-14.7
-- Laptops	2.7	0.3	1.4
-- Tablets	-12.6	-10.4	-42.2
Peripherals	-1.6	-0.2	-1.2
- Monitors	-1.5	1.6	8.5
- Printers	-1.6	-1.5	-7.1
Computers and Peripherals	-2.5	-3.4	-16.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	4,874.7	5,326.1	6,039.2	6,080.1	6,035.5	6,138.1
- Desktops	2,280.0	2,507.3	2,416.7	2,295.7	2,200.4	2,146.3
- Portable Computers	2,594.7	2,818.8	3,622.5	3,784.4	3,835.1	3,991.8
-- Laptops	2,037.6	2,247.9	2,949.7	3,075.9	3,168.9	3,311.6
-- Tablets	557.1	570.9	672.8	708.5	666.2	680.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	2,229.5	2,458.6	2,809.3	2,851.5	2,883.2	2,969.6
- Desktops	1,141.2	1,278.0	1,263.7	1,225.4	1,203.3	1,201.3
- Portable Computers	1,088.3	1,180.6	1,545.6	1,626.1	1,679.9	1,768.3
-- Laptops	982.9	1,071.0	1,407.6	1,471.3	1,528.6	1,609.8
-- Tablets	105.4	109.6	138.1	154.8	151.3	158.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total

Computers	1.7	4.7	25.9
- Desktops	-2.5	-1.2	-5.9
- Portable Computers	4.1	9.0	53.8
-- Laptops	4.5	10.2	62.5
-- Tablets	2.1	4.1	22.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	3.0	5.9	33.2
- Desktops	-0.2	1.0	5.3
- Portable Computers	5.3	10.2	62.5
-- Laptops	5.3	10.4	63.8
-- Tablets	4.8	8.5	50.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	18.7	29.6	32.5
Fixed	81.3	70.4	67.5
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	14.1	15.7	17.5	17.6	17.7	17.4
iOS	22.5	24.3	25.1	27.3	28.3	28.6
Android	63.4	60.0	57.4	55.1	54.0	54.0
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
HP Deutschland GmbH	10.8	13.0	13.0	13.1	13.4

Canon Deutschland GmbH	7.8	8.7	8.9	9.1	9.3
Apple GmbH	9.3	9.2	9.8	9.9	9.3
Samsung Electronics Deutschland GmbH	9.6	8.9	8.4	8.2	7.7
Lenovo Deutschland GmbH	6.2	6.1	6.0	6.1	6.1
Medion AG	5.6	5.6	5.5	5.6	5.7
Dell GmbH	3.8	4.6	4.8	5.0	5.2
Acer Computer GmbH	4.6	4.7	4.6	4.7	4.7
Epson Deutschland GmbH	3.8	4.2	4.3	4.4	4.5
Fujitsu Technology Solutions GmbH	2.6	2.5	2.4	2.3	2.3
Asus Computer GmbH	2.1	2.0	1.9	1.9	2.0
Brother International GmbH	1.6	1.8	1.8	1.8	1.9
Microsoft Deutschland GmbH	1.9	2.1	2.0	2.0	1.8
Amazon.de GmbH	1.9	2.0	1.9	1.8	1.7
Huawei Technologies Deutschland GmbH	1.1	1.3	1.5	1.6	1.6
LG Electronics Deutschland GmbH	1.3	1.3	1.4	1.4	1.5
TP Vision Europe BV	0.9	1.0	1.1	1.1	1.2
ZTE Deutschland GmbH	1.1	1.0	1.0	1.0	0.9
Archos Deutschland GmbH	1.1	0.9	0.9	0.9	0.8
AOC International (Europe) GmbH	0.6	0.7	0.7	0.7	0.8
ViewSonic Europe Ltd	0.4	0.5	0.5	0.5	0.5
Haier Deutschland GmbH	0.4	0.5	0.5	0.5	0.5
Sony Europe Ltd	0.2	0.1	0.0	0.0	0.0
Toshiba Europe (IE) GmbH	0.1	-	-	-	-
Hewlett-Packard Deutschland GmbH	-	-	-	-	-
Philips GmbH	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-
BlackBerry Ltd	-	-	-	-	-
Others	21.2	17.3	16.9	16.3	16.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	HP Deutschland GmbH	11.3	11.3	11.4	11.6
Canon (Canon Inc)	Canon Deutschland GmbH	8.7	8.9	9.1	9.3
Samsung (Samsung Corp)	Samsung Electronics Deutschland GmbH	8.9	8.4	8.2	7.7
iPad (Apple Inc)	Apple GmbH	7.3	7.9	7.8	7.2
Lenovo (Lenovo Group Ltd)	Lenovo Deutschland GmbH	6.1	6.0	6.1	6.1
Medion (Lenovo Group Ltd)	Medion AG	5.6	5.5	5.6	5.7
Dell (Dell Technologies Inc)	Dell GmbH	4.6	4.8	5.0	5.2
Acer (Acer Inc)	Acer Computer GmbH	4.7	4.6	4.7	4.7
Epson (Seiko Epson Corp)	Epson Deutschland GmbH	4.2	4.3	4.4	4.5

Fujitsu (Lenovo Group Ltd)	Fujitsu Technology Solutions GmbH	2.5	2.4	2.3	2.3
Asus (AsusTek Computer Inc)	Asus Computer GmbH	2.0	1.9	1.9	2.0
MacBook (Apple Inc)	Apple GmbH	1.6	1.7	1.8	1.9
Brother (Brother Industries Ltd)	Brother International GmbH	1.8	1.8	1.8	1.9
Microsoft Surface (Microsoft Corp)	Microsoft Deutschland GmbH	2.1	2.0	2.0	1.8
Samsung (HP Inc)	HP Deutschland GmbH	1.7	1.7	1.7	1.8
Fire (Amazon.com Inc)	Amazon.de GmbH	2.0	1.9	1.8	1.7
Huawei (Huawei Technologies Co Ltd)	Huawei Technologies Deutschland GmbH	1.3	1.5	1.6	1.6
LG (LG Corp)	LG Electronics Deutschland GmbH	1.3	1.4	1.4	1.5
Philips (Koninklijke Philips NV)	TP Vision Europe BV	1.0	1.1	1.1	1.2
ZTE (ZTE Corp)	ZTE Deutschland GmbH	1.0	1.0	1.0	0.9
Archos (Archos SA)	Archos Deutschland GmbH	0.9	0.9	0.9	0.8
AOC (TPV Technology Ltd)	AOC International (Europe) GmbH	0.7	0.7	0.7	0.8
Viewsonic (ViewSonic Corp)	ViewSonic Europe Ltd	0.5	0.5	0.5	0.5
Haier (Haier Group)	Haier Deutschland GmbH	0.5	0.5	0.5	0.5
Mac (Apple Inc)	Apple GmbH	0.3	0.3	0.3	0.3
Sony (Sony Corp)	Sony Europe Ltd	0.1	0.0	0.0	0.0
Blackberry	BlackBerry Ltd	-	-	-	-
Dell (Dell Inc)	Dell GmbH	-	-	-	-
Fujitsu (Fujitsu Ltd)	Fujitsu Technology Solutions GmbH	-	-	-	-
Blackberry	Research in Motion Ltd	-	-	-	-
Others	Others	17.3	16.9	16.3	16.7
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	71.9	69.6	68.1	67.7	67.4	67.4
- Grocery Retailers	11.4	11.5	11.9	11.7	11.6	11.5
-- Discounters	6.6	6.7	7.1	7.0	6.9	6.9
-- Hypermarkets	3.0	3.1	3.2	3.2	3.1	3.1
-- Supermarkets	1.8	1.7	1.7	1.6	1.6	1.5
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	48.1	45.7	43.5	43.4	43.3	43.3
-- Electronics and Appliance Specialist Retailers	45.7	44.3	42.4	41.8	42.0	42.5
-- Other Non-Grocery Specialists	2.4	1.3	1.1	1.6	1.3	0.8
- Mixed Retailers	12.3	12.4	12.6	12.6	12.5	12.5
Non-Store Retailing	28.1	30.4	31.9	32.3	32.6	32.6
- Direct Selling	-	-	-	-	-	-
- Homeshopping	0.9	0.9	0.9	0.9	0.9	0.8

- E-Commerce	27.2	29.5	30.9	31.4	31.7	31.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	8,311.5	7,783.8	7,323.9	6,918.6	6,591.3	6,302.4
- Desktops	769.8	693.1	620.1	551.2	489.8	428.7
- Portable Computers	7,541.7	7,090.6	6,703.8	6,367.5	6,101.5	5,873.7
-- Laptops	4,197.8	4,302.2	4,396.3	4,479.2	4,547.2	4,614.6
-- Tablets	3,343.9	2,788.4	2,307.6	1,888.2	1,554.2	1,259.0
Peripherals	4,971.2	4,958.9	4,963.4	4,953.2	4,931.3	4,917.1
- Monitors	1,428.0	1,455.2	1,494.5	1,511.2	1,507.5	1,503.7
- Printers	3,543.2	3,503.7	3,468.9	3,442.0	3,423.8	3,413.4
Computers and Peripherals	13,282.7	12,742.7	12,287.4	11,871.8	11,522.6	11,219.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	4,513.8	4,345.8	4,188.2	4,038.8	3,908.9	3,784.2
- Desktops	505.6	452.4	402.1	355.3	314.2	275.1
- Portable Computers	4,008.2	3,893.4	3,786.1	3,683.5	3,594.7	3,509.1
-- Laptops	3,006.7	3,039.8	3,064.1	3,079.5	3,088.7	3,089.0
-- Tablets	1,001.4	853.6	721.9	604.0	506.0	420.1
Peripherals	716.2	710.2	708.2	702.6	680.3	664.4
- Monitors	296.1	293.7	293.7	289.0	271.4	256.5
- Printers	420.2	416.4	414.5	413.6	408.9	407.9
Computers and Peripherals	5,230.0	5,056.0	4,896.4	4,741.4	4,589.2	4,448.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-6.3	-5.4	-24.2
- Desktops	-10.0	-11.0	-44.3
- Portable Computers	-6.0	-4.9	-22.1
-- Laptops	2.5	1.9	9.9
-- Tablets	-16.6	-17.7	-62.3
Peripherals	-0.2	-0.2	-1.1
- Monitors	1.9	1.0	5.3
- Printers	-1.1	-0.7	-3.7
Computers and Peripherals	-4.1	-3.3	-15.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-3.7	-3.5	-16.2
- Desktops	-10.5	-11.5	-45.6
- Portable Computers	-2.9	-2.6	-12.5
-- Laptops	1.1	0.5	2.7
-- Tablets	-14.8	-15.9	-58.1
Peripherals	-0.8	-1.5	-7.2
- Monitors	-0.8	-2.8	-13.4
- Printers	-0.9	-0.6	-2.9
Computers and Peripherals	-3.3	-3.2	-14.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	6,138.1	6,247.2	6,348.3	6,483.0	6,716.6	6,887.9
- Desktops	2,146.3	2,082.1	2,007.8	1,969.8	2,032.5	2,087.5
- Portable Computers	3,991.8	4,165.1	4,340.5	4,513.1	4,684.1	4,800.5
-- Laptops	3,311.6	3,477.4	3,651.7	3,820.8	3,987.3	4,102.5
-- Tablets	680.2	687.8	688.8	692.3	696.8	698.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	2,969.6	3,015.4	3,056.8	3,115.7	3,229.8	3,313.8
- Desktops	1,201.3	1,174.9	1,142.4	1,130.2	1,175.6	1,217.0
- Portable Computers	1,768.3	1,840.5	1,914.4	1,985.5	2,054.2	2,096.8
-- Laptops	1,609.8	1,679.7	1,752.8	1,822.4	1,890.5	1,933.1
-- Tablets	158.5	160.8	161.6	163.1	163.8	163.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	1.8	2.3	12.2
- Desktops	-3.0	-0.6	-2.7

- Portable Computers	4.3	3.8	20.3
-- Laptops	5.0	4.4	23.9
-- Tablets	1.1	0.5	2.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	1.5	2.2	11.6
- Desktops	-2.2	0.3	1.3
- Portable Computers	4.1	3.5	18.6
-- Laptops	4.3	3.7	20.1
-- Tablets	1.4	0.6	3.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	32.5	34.7	36.6	38.3	39.0	39.2
Fixed	67.5	65.3	63.4	61.7	61.0	60.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	17.4	17.3
iOS	28.6	28.7
Android	54.0	54.0
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Italy

Euromonitor International

August 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Working from home and remote schooling drive up demand.....	1
E-commerce makes significant gains, while independents look to reinvent themselves.....	1
COVID-19 brings end to Xerox's plans to acquire HP	1
RECOVERY AND OPPORTUNITIES	2
Experiences of lockdown set to support demand for products for home working and learning.	2
Gaming to support growth in monitors and laptops.....	2
Bleak outlook for desktops.....	2
CATEGORY DATA.....	2
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	2
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	3
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	3
Table 5 Sales of Computers by Category: Business Volume 2015-2020	4
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	4
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	4
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	4
Table 9 Sales of Laptops by Form Factor 2018-2020	5
Table 10 Sales of Tablets by Operating System 2015-2020	5
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	5
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	7
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	7
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	8
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	9
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	9
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	10
Table 23 Forecast Sales of Tablets by Operating System 2020-2021	10

COMPUTERS AND PERIPHERALS IN ITALY

KEY DATA FINDINGS

- The need to work from home due to COVID-19 led to a spike in sales early in 2020
- Computers and peripherals sees -0.4% current value growth in 2020 to reach 5.8 million units
- Monitors sees the strongest growth in 2020, with retail volumes up 3% to 105,300 units
- Hewlett-Packard Italiana Srl is the leading player in 2020 with a 21% volume share
- Computers and peripherals is forecast to see volumes rise with a 0.3% CAGR over 2020-2025 to reach 5.9 million units

2020 IMPACT

Working from home and remote schooling drive up demand

Lockdown aimed at preventing the spread of COVID-19 led to a spike in sales of consumer electronics, including computers and peripherals. The need to work from home meant that people had to build home offices, while the closure of schools required parents to equip their children with devices for e-learning. These circumstances provided a boost to laptops, which are perceived to offer more functions and better resolution and use than tablets and smartphones. BYOD (bring your own device) was popular at the beginning of lockdown, with people looking for old devices they already had at home to begin home working.

E-commerce makes significant gains, while independents look to reinvent themselves

The closure of non-essential stores and home seclusion aimed at containing the spread of COVID-19 have further bolstered the presence of e-commerce in computers and peripherals. Indeed, the channel is set to see its strongest share growth of the review period in 2020. Nonetheless, as Italy emerges from lockdown, independent consumer electronics specialist retailers are reinventing themselves in the face of increased competition from both e-commerce and big box players like Mediaworld or Euronics. If in 2019, the channel's sales were sustained by gaming and the growth of e-sports, in 2020 neighbourhood stores are gaining a new boost by showing consumers they can be easily available not only to conclude actual sales, but also with the support of technical assistance.

COVID-19 brings end to Xerox's plans to acquire HP

Hewlett-Packard (HP) maintained its lead in computers and peripherals in 2020, followed by Acer and Apple. HP continues to enjoy strong brand awareness amongst Italian consumers, especially within the business environment. In 2019, HP announced a restructuring plan aimed at saving USD1 billion per year by cutting between 7,000 and 9,000 jobs by the end of 2022. In 2019 and 2020, news about HP focused on a possible acquisition by Xerox. However, Xerox dropped its acquisition plans due to the COVID-19 pandemic.

Apple continues to innovate in computers and peripherals, focusing largely on professional users with products such as the professional workstation, MacPro, and the Magic Keyboard with

Trackpad for iPad Pro launched at the beginning of 2020. Meanwhile, MacBook Pro remains popular amongst consumers.

In Lenovo's strategy, hardware is an important part of a larger and more complex automation process that includes cloud and artificial intelligence. While this applies primarily to business partners, the company, the fourth largest in computers and peripherals, is also targeting private customers and gamers. Indeed, at the end of July 2020, it announced the opening of a new flagship store, Spazio Lenovo, in Milan in September 2020.

RECOVERY AND OPPORTUNITIES

Experiences of lockdown set to support demand for products for home working and learning

The COVID-19 lockdown has established the infrastructure for people to work from home and proven the viability of remote working. This experience is, therefore, likely to consolidate the existing trend towards more flexible working patterns and a greater prevalence of people working from home. In addition, lockdown has familiarised parents and children with learning on electronic devices at home. Consequently, the forecast period is likely to see an increasing demand for consumer electronics that support working from home and home learning, with laptops set to be amongst the most prominent beneficiaries of this trend over the 2020-2025 period.

Gaming to support growth in monitors and laptops

Lockdown meant that Italian consumers had to find ways to pass many hours of enforced home seclusion. Gaming proved to be a popular choice amongst many, particularly younger, consumers, serving both to strengthen the commitment of established gamers and expand the consumer base for gaming related products. The increased demand for products related to gaming is set to support the growth forecast for the monitors category over 2020-2025. Indeed, gaming will also play a role in the expansion of laptops over the forecast period, with major brands investing in the development of new products with enhanced performance and video resolution, which can improve the gaming experience.

Bleak outlook for desktops

While the trend towards working from home is encouraging people to develop home offices, this is not serving to strengthen demand for desktops. This is largely because the increasing flexibility of working practices is supporting demand for portable products that can be used across multiple locations. Moreover, the increasing sophistication of laptops means that they are capable of performing all the tasks required by home workers, and increasingly gamers too, to a high standard. Increased connectivity across a wider range of domestic products, including smart TVs, represents a further threat to desktops, which are increasingly coming to be perceived as obsolete.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020

Computers	5,825.1	5,577.9	5,356.0	5,219.3	5,244.7	5,232.8
- Desktops	521.0	499.4	440.9	413.3	384.3	355.5
- Portable Computers	5,304.1	5,078.5	4,915.0	4,806.0	4,860.3	4,877.3
-- Laptops	2,674.8	2,801.6	2,959.6	3,078.0	3,198.6	3,257.8
-- Tablets	2,629.3	2,277.0	1,955.5	1,728.1	1,661.7	1,619.5
Peripherals	760.4	716.9	666.7	633.1	600.7	586.5
- Monitors	114.6	114.9	110.1	106.8	102.0	105.3
- Printers	645.8	602.0	556.6	526.3	498.7	481.2
Computers and Peripherals	6,585.6	6,294.8	6,022.7	5,852.4	5,845.4	5,819.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	3,057.9	2,892.0	2,850.8	2,829.0	2,772.2	2,741.4
- Desktops	673.1	650.1	586.4	555.2	520.7	462.3
- Portable Computers	2,384.8	2,241.9	2,264.4	2,273.8	2,251.4	2,279.1
-- Laptops	1,457.1	1,501.5	1,632.5	1,717.7	1,728.7	1,778.5
-- Tablets	927.7	740.4	631.9	556.1	522.7	500.6
Peripherals	82.8	77.0	69.8	70.5	69.8	73.2
- Monitors	16.0	16.1	14.3	16.3	17.9	19.1
- Printers	66.8	60.9	55.5	54.2	51.9	54.1
Computers and Peripherals	3,140.7	2,969.0	2,920.6	2,899.5	2,842.0	2,814.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.2	-2.1	-10.2
- Desktops	-7.5	-7.4	-31.8
- Portable Computers	0.3	-1.7	-8.0
-- Laptops	1.9	4.0	21.8
-- Tablets	-2.5	-9.2	-38.4
Peripherals	-2.4	-5.1	-22.9
- Monitors	3.3	-1.7	-8.1
- Printers	-3.5	-5.7	-25.5
Computers and Peripherals	-0.4	-2.4	-11.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.1	-2.2	-10.4
- Desktops	-11.2	-7.2	-31.3
- Portable Computers	1.2	-0.9	-4.4

-- Laptops	2.9	4.1	22.1
-- Tablets	-4.2	-11.6	-46.0
Peripherals	4.8	-2.4	-11.6
- Monitors	6.4	3.6	19.4
- Printers	4.2	-4.1	-19.1
Computers and Peripherals	-1.0	-2.2	-10.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	2,988.1	2,771.6	2,742.0	2,763.4	2,785.6	2,790.8
- Desktops	1,171.8	1,097.8	1,041.9	1,014.8	994.5	945.9
- Portable Computers	1,816.3	1,673.8	1,700.1	1,748.6	1,791.1	1,844.9
-- Laptops	1,211.6	1,332.7	1,419.4	1,502.1	1,575.0	1,662.4
-- Tablets	604.7	341.1	280.7	246.5	216.1	182.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	1,369.1	1,384.3	1,380.8	1,388.4	1,385.8	1,388.2
- Desktops	443.1	410.3	381.1	366.6	359.8	348.1
- Portable Computers	926.1	973.9	999.7	1,021.8	1,026.0	1,040.1
-- Laptops	693.5	761.9	807.7	849.4	871.7	907.4
-- Tablets	232.5	212.0	191.9	172.4	154.3	132.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	0.2	-1.4	-6.6
- Desktops	-4.9	-4.2	-19.3
- Portable Computers	3.0	0.3	1.6
-- Laptops	5.5	6.5	37.2
-- Tablets	-15.5	-21.3	-69.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total

Computers	0.2	0.3	1.4
- Desktops	-3.3	-4.7	-21.4
- Portable Computers	1.4	2.3	12.3
-- Laptops	4.1	5.5	30.8
-- Tablets	-14.0	-10.6	-42.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	25.0	30.0	34.0
Fixed	75.0	70.0	66.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	26.0	32.6	32.5	37.4	35.3	35.7
iOS	31.7	30.0	35.3	40.3	43.2	42.6
Android	42.3	37.5	32.2	22.3	21.5	21.7
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Hewlett-Packard Italiana Srl	18.3	20.7	21.2	21.5	20.7
Acer Italy Srl	16.1	17.9	18.8	18.7	18.0
Apple Italia Srl	13.5	15.3	18.1	18.3	17.6
Lenovo (Italy) Srl	5.7	8.5	9.4	11.0	11.3
AsusTek Italy Srl	8.2	10.4	9.2	8.8	8.4
Samsung Electronics Italia SpA	11.4	9.7	9.0	8.3	8.3
Canon Italia SpA	2.3	2.2	2.1	2.0	1.9
Epson Italia SpA	2.1	2.0	2.0	1.9	1.8
Dell Italia SpA	1.6	1.7	1.7	1.8	1.8
Microsoft Italia SpA	4.7	1.6	1.3	1.0	0.9
Huawei Technologies Italia Srl	-	0.4	0.5	0.6	0.6
Amazon.com Inc	0.4	0.5	0.5	0.5	0.5
LG Electronics Italia SpA	1.9	0.5	0.5	0.5	0.5
Brother Italia SpA	0.6	0.6	0.5	0.5	0.5

Datamatic Spa	0.4	0.4	0.3	0.3	0.3
Philips SpA	0.2	0.2	0.2	0.2	0.2
Sony Italia SpA	0.4	0.2	0.1	-	-
Fujitsu Technology Solutions SpA	0.4	0.2	0.0	-	-
Toshiba Electronics Italiana srl	2.6	-	-	-	-
Motorola SpA	-	-	-	-	-
Barnes & Noble Inc	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-
BlackBerry Ltd	-	-	-	-	-
Others	9.4	7.0	4.5	4.0	6.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard Italiana Srl	19.7	20.2	20.5	19.8
Acer (Acer Inc)	Acer Italy Srl	17.9	18.8	18.7	18.0
iPad (Apple Inc)	Apple Italia Srl	11.5	11.9	12.3	11.8
Lenovo (Lenovo Group Ltd)	Lenovo (Italy) Srl	8.5	9.4	11.0	11.3
Asus (AsusTek Computer Inc)	AsusTek Italy Srl	10.4	9.2	8.8	8.4
Samsung (Samsung Corp)	Samsung Electronics Italia SpA	9.7	9.0	8.3	8.3
MacBook (Apple Inc)	Apple Italia Srl	3.5	5.8	5.7	5.5
Canon (Canon Inc)	Canon Italia SpA	2.2	2.1	2.0	1.9
Epson (Seiko Epson Corp)	Epson Italia SpA	2.0	2.0	1.9	1.8
Dell (Dell Technologies Inc)	Dell Italia SpA	1.7	1.7	1.8	1.8
Samsung (HP Inc)	Hewlett-Packard Italiana Srl	1.0	1.0	0.9	0.9
Microsoft Surface (Microsoft Corp)	Microsoft Italia SpA	1.6	1.3	1.0	0.9
Huawei (Huawei Technologies Co Ltd)	Huawei Technologies Italia Srl	0.4	0.5	0.6	0.6
Fire	Amazon.com Inc	0.5	0.5	0.5	0.5
LG (LG Corp)	LG Electronics Italia SpA	0.5	0.5	0.5	0.5
Brother (Brother Industries Ltd)	Brother Italia SpA	0.6	0.5	0.5	0.5
Mediacom	Datamatic Spa	0.4	0.3	0.3	0.3
Mac (Apple Inc)	Apple Italia Srl	0.3	0.4	0.4	0.3
Philips (Koninklijke Philips NV)	Philips SpA	0.2	0.2	0.2	0.2
Sony (Sony Corp)	Sony Italia SpA	0.2	0.1	-	-
Fujitsu (Lenovo Group Ltd)	Fujitsu Technology Solutions SpA	0.2	0.0	-	-
Nook	Barnes & Noble Inc	-	-	-	-
Blackberry	BlackBerry Ltd	-	-	-	-
Dell (Dell Inc)	Dell Italia SpA	-	-	-	-
Fujitsu (Fujitsu Ltd)	Fujitsu Technology	-	-	-	-

HP (Hewlett-Packard Development Co LP)	Solutions SpA Hewlett-Packard Italiana Srl	-	-	-	-
Motorola (Google Inc)	Motorola SpA	-	-	-	-
Motorola (Motorola Mobility Inc)	Motorola SpA	-	-	-	-
Philips (Koninklijke Philips Electronics NV)	Philips SpA	-	-	-	-
Blackberry	Research in Motion Ltd	-	-	-	-
Others	Others	7.0	4.5	4.0	6.7
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	83.6	82.7	81.9	80.6	75.8	69.6
- Grocery Retailers	19.5	17.8	17.3	16.7	15.3	9.3
-- Discounters	0.7	0.5	0.5	0.4	0.2	0.2
-- Hypermarkets	16.3	15.3	15.0	14.8	13.7	7.6
-- Supermarkets	2.5	2.0	1.8	1.4	1.4	1.4
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	63.8	64.7	64.5	63.8	60.4	60.1
-- Electronics and Appliance Specialist Retailers	63.8	64.7	64.5	63.8	60.4	60.1
-- Other Non-Grocery Specialists	-	-	-	-	-	-
- Mixed Retailers	0.3	0.1	0.1	0.1	0.1	0.1
Non-Store Retailing	16.4	17.3	18.1	19.4	24.2	30.4
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	16.4	17.3	18.1	19.4	24.2	30.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	5,232.8	5,230.4	5,239.2	5,257.9	5,284.3	5,325.4
- Desktops	355.5	325.9	294.8	265.3	234.5	206.4
- Portable Computers	4,877.3	4,904.5	4,944.5	4,992.6	5,049.7	5,119.0
-- Laptops	3,257.8	3,322.9	3,396.4	3,475.5	3,560.7	3,652.9
-- Tablets	1,619.5	1,581.6	1,548.1	1,517.1	1,489.1	1,466.1
Peripherals	586.5	577.0	572.6	575.2	578.5	582.8
- Monitors	105.3	106.6	107.5	108.2	108.6	108.7
- Printers	481.2	470.4	465.1	467.0	470.0	474.1
Computers and Peripherals	5,819.3	5,807.4	5,811.9	5,833.1	5,862.8	5,908.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	2,741.4	2,733.0	2,731.8	2,744.0	2,771.1	2,819.7
- Desktops	462.3	404.3	340.9	282.2	228.0	180.1
- Portable Computers	2,279.1	2,328.7	2,390.9	2,461.8	2,543.1	2,639.6
-- Laptops	1,778.5	1,847.5	1,921.4	2,002.3	2,092.4	2,194.5
-- Tablets	500.6	481.2	469.4	459.4	450.7	445.0
Peripherals	73.2	75.4	77.4	79.3	81.0	82.8
- Monitors	19.1	20.3	21.5	22.7	23.9	25.1
- Printers	54.1	55.1	55.9	56.6	57.2	57.7
Computers and Peripherals	2,814.5	2,808.4	2,809.1	2,823.2	2,852.1	2,902.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.0	0.4	1.8
- Desktops	-8.3	-10.3	-41.9
- Portable Computers	0.6	1.0	5.0
-- Laptops	2.0	2.3	12.1
-- Tablets	-2.3	-2.0	-9.5
Peripherals	-1.6	-0.1	-0.6
- Monitors	1.2	0.6	3.2
- Printers	-2.3	-0.3	-1.5
Computers and Peripherals	-0.2	0.3	1.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-0.3	0.6	2.9
- Desktops	-12.5	-17.2	-61.0
- Portable Computers	2.2	3.0	15.8
-- Laptops	3.9	4.3	23.4
-- Tablets	-3.9	-2.3	-11.1
Peripherals	3.0	2.5	13.1
- Monitors	6.2	5.6	31.3
- Printers	1.9	1.3	6.7
Computers and Peripherals	-0.2	0.6	3.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	2,790.8	2,802.1	2,815.6	2,837.0	2,861.3	2,886.8
- Desktops	945.9	895.2	842.4	791.9	742.4	693.1
- Portable Computers	1,844.9	1,906.9	1,973.1	2,045.1	2,118.9	2,193.7
-- Laptops	1,662.4	1,750.7	1,838.2	1,927.5	2,015.0	2,100.3
-- Tablets	182.5	156.2	135.0	117.6	103.8	93.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	1,388.2	1,391.1	1,405.8	1,424.0	1,442.4	1,462.5
- Desktops	348.1	333.4	318.2	303.5	289.0	274.7
- Portable Computers	1,040.1	1,057.7	1,087.6	1,120.5	1,153.5	1,187.8
-- Laptops	907.4	943.9	989.7	1,035.6	1,079.4	1,122.5
-- Tablets	132.7	113.8	97.9	84.9	74.1	65.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.4	0.7	3.4
- Desktops	-5.4	-6.0	-26.7
- Portable Computers	3.4	3.5	18.9
-- Laptops	5.3	4.8	26.3
-- Tablets	-14.4	-12.5	-48.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.2	1.0	5.4
- Desktops	-4.2	-4.6	-21.1
- Portable Computers	1.7	2.7	14.2
-- Laptops	4.0	4.3	23.7
-- Tablets	-14.2	-13.2	-50.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	34.0	38.0	43.0	45.3	45.5	46.0
Fixed	66.0	62.0	57.0	54.7	54.5	54.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	35.7	35.8
iOS	42.6	42.6
Android	21.7	21.6
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in France

Euromonitor International

August 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Overall sales decline projected for 2020 despite surge in demand during lockdown	1
Interest in products optimised for gaming continues to rise	2
Apple set to claim overall lead from Hewlett-Packard in 2020	2
RECOVERY AND OPPORTUNITIES	2
Recession, maturity and device cannibalisation will continue to restrict demand	3
Business sales set to remain more resilient than retail sales.....	3
Laptops will be A focal point for innovation as companies seek to boost value sales.....	3
CATEGORY DATA.....	4
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	5
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	6
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015- 2020	6
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017- 2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	9
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	10
Table 18 Forecast Sales of Computers by Category: Business Volume 2020- 2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	11
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23 Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN FRANCE

KEY DATA FINDINGS

- Economic recession and supply chain disruption caused by COVID-19 have a broadly negative impact on computers and peripherals in 2020, though growth in the number of people working from home boosts demand for some product types
- Computers and peripherals retail volume sales decline by 6% in 2020 to reach 10.4 million units
- Laptops records the slowest decline in retail volume terms in 2020, with sales falling by 3%
- Apple France SARL leads computers and peripherals in 2020 with an overall retail volume share of 16%
- Computers and peripherals retail volume sales are expected to decline at a CAGR of 7% over the forecast to reach 7.4 million units in 2025

2020 IMPACT

Overall sales decline projected for 2020 despite surge in demand during lockdown

Demand for computers and peripherals increased during the nationwide lockdown imposed between mid-March and mid-May 2020 to curb the spread of COVID-19 in France. This was primarily due to a dramatic rise in the number of people working from home, though consumers also purchased certain products to ensure they could maintain contact with friends and family via Zoom, Skype and similar platforms. Moreover, parents bought new computers and peripherals to keep their children entertained and enable them to participate in online classes while schools and universities were closed. These trends primarily boosted sales of laptops, but also drove demand for other items such as tablets, monitors and printers. Due to the temporary closure of non-essential stores, most computers and peripherals purchases during this period were made via the e-commerce channel.

Despite the spike in demand during lockdown, computers and peripherals looks set to see retail volume sales decline over 2020 as a whole. This is partly because sales for the entire year will be depressed by the economic recession caused by COVID-19, which has reduced confidence and purchasing power among consumers. At the same time, the pandemic has disrupted global supply chains, limiting the availability of certain products, and led some manufacturers to push back new launches. Demand will be further constrained by underlying factors that pre-date COVID-19, such as increasing maturity, longer replacement cycles and cannibalisation by smartphones. In computers, business sales should prove more resilient to difficult trading conditions than retail sales, as companies will require new devices to facilitate working from home by employees. In addition, many businesses have recently started to upgrade their IT infrastructure to ensure they are better positioned to benefit from government reforms aimed at strengthening the competitiveness of the French economy.

Interest in products optimised for gaming continues to rise

Laptops is expected to post the slowest rate of decline in retail volume sales of any computers and peripherals category in 2020. This is mainly because it will be the chief beneficiary of growth in the number of people working from home as a result of COVID-19. However, its performance should also be lifted by robust demand for specialist products that are optimised for gaming. Interest in such products has increased steadily in recent years as playing video games has become a more popular activity among consumers of all ages in France. It is likely this trend will be reinforced by the COVID-19 pandemic, as children and adults alike have turned to gaming to entertain themselves and maintain contact with friends while spending more time at home due to lockdown measures, new social distancing rules and ongoing concerns about community transmission of the virus. Demand for higher-end products optimised for gaming should also help to temper the pace of retail volume sales decline in monitors and – to a lesser extent – desktops in 2020.

Apple set to claim overall lead from Hewlett-Packard in 2020

Apple is expected to surpass Hewlett-Packard to become the overall leader in computers and peripherals in retail volume sales terms in 2020. Thanks to a loyal base mainly comprising higher-income consumers who value the cohesive user experience provided by its products and services, Apple looks set to weather the initial economic shock of COVID-19 better than many competitors. Similarly, its reputation for innovation and positioning as a premium lifestyle brand should ensure new launches – including upgraded versions of the iPad Pro and MacBook Pro – are well received despite the challenging trading environment. Nonetheless, Hewlett-Packard will retain its leading position in laptops, where its performance should be lifted by the release of new products like the 5G-enabled HP Elite Dragonfly G2 and the HP Spectre x360 15T, a convertible model featuring an Intel Core i7-1065G7 processor, a 4K touch display and reduced borders for a larger screen size. New product developments – including the HP Envy AiO 32 – should also help to ensure that Hewlett-Packard remains the second leading player in desktops, behind Lenovo. Lenovo is likely to see its retail volume share in this category rise thanks to its competitive pricing strategy and the launch of new products such as the ThinkCentre-in-One 24 Gen 4 (TIO 24). The same factors should enable Lenovo to gain ground in laptops. Most notably, it is poised to benefit from the launch of the Yoga 5G, its first 5G compatible laptop, and the ThinkPad X1 Fold, its first model with a foldable display.

Consolidation in tablets looks set to become more pronounced in 2020 as economic recession compounds the existing challenges facing the category, ie cannibalisation by lighter and more compact laptops and smartphones with larger screens. Apple and Samsung, the clear leaders, are both expected to record substantial volume share gains as smaller players continue to struggle and exit the category. Huawei and Microsoft meanwhile are projected to record the fastest growth in volume sales. Huawei looks set to be the more dynamic of the two in this regard, as its low price positioning will enable it to capitalise on increased budget-consciousness among consumers. In contrast, Microsoft's premium Surface range will continue to benefit from its reputation for combining innovative, lightweight designs with the kind of processing power and functionality traditionally found in high-end laptops rather than tablets. New launches and upgrades will also help to boost volume growth rates for both companies over 2020 as a whole.

RECOVERY AND OPPORTUNITIES

Recession, maturity and device cannibalisation will continue to restrict demand

The outlook for computers and peripherals is poor, with overall retail volume and current value sales projected to decline throughout the forecast period. While the economic recession that has resulted from COVID-19 will continue to undermine the category's performance in the short to medium term, demand will also be depressed by longer-term factors such as increasing maturity, the gradual extension of replacement cycles and device cannibalisation. Laptops will continue to cannibalise demand for desktops and tablets, while sales of both laptops and tablets will be constrained by the growing use of smartphones with larger screens. The threat posed by smartphones will intensify as more producers launch advanced models offering 5G compatibility, foldable displays, superior functionality, longer battery life etc. At the same time, the wider trend towards device cannibalisation will be reinforced by the rollout of 5G, advances in cloud computing and hardware innovations.

Monitors is the only category expected to develop positively in retail volume and current sales terms. Growth will be partly driven by the replacement of older products, though screen convergence and the increasing preference for direct streaming of HD content will continue to encourage consumers to upgrade to larger and more sophisticated monitors offering higher resolution specs, better colour accuracy and faster refresh rates. In line with the growing popularity of video games in France, rising demand for monitors with built-in graphics cards and other gaming-oriented features will also help to sustain the expansion of the category.

Business sales set to remain more resilient than retail sales

While retail volume sales of computers are expected to decline throughout the forecast period, overall business volume sales look set to increase steadily, and at a slightly faster rate than during the review period. Business volume sales will be bolstered as more companies allow employees to regularly work from home in order to comply with new social distancing rules and address ongoing concerns about community transmission of COVID-19. Moreover, companies will purchase additional computers to reduce the risk of the virus spreading in the workplace, and to ensure they can cope with increased online demand for products and services in the post-pandemic world. The implementation of government reforms aimed at stimulating economic development will also remain a key driver of growth in business volume sales of computers. Tablets and laptops will be the primary beneficiaries of these trends, though they should also help to bolster demand for desktops.

Laptops will be A focal point for innovation as companies seek to boost value sales

Given the limited potential for volume sales growth, over the forecast period many companies in computers and peripherals will continue to try to boost value sales via the launch of higher-priced and more sophisticated products. In particular, manufacturers are expected to concentrate on developing products that marry cutting-edge technologies with physical design features that provide greater convenience and enhance user experiences. Laptops – which looks set to see retail volume sales decline at a markedly slower rate than both desktops and tablets – will be a focal point for innovation. Most notably, this category should benefit from the launch of lighter and slimmer models with larger screens. These will include laptops with foldable displays, which are likely to begin appearing from late 2020 onwards. Several companies are also expected to introduce 5G-enabled laptops. Processing power will be another key area for innovation, as consumers increasingly favour versatile laptops that can maintain high performance standards whether being used for work tasks, streaming HD content or gaming. This preference for versatility will also encourage companies to expand their offer of

convertible laptops, which look set to continue making volume share gains at the expense of fixed models.

While new higher-end products with innovative features and functions should be well received across computers and peripherals, increased economic uncertainty in the wake of COVID-19 means more affordable models offering good value for money are also expected to perform well over the forecast period. This will create opportunities for companies with more competitive pricing strategies to gain ground, particularly Lenovo, Asus and Huawei but also local players such as Thomson. However, some mid-range brands and products may struggle as individual categories become more polarised between the premium and economy segments. This in turn is likely to reinforce the recent trend towards greater consolidation in the competitive landscape.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	10,788.4	9,729.5	9,362.3	8,755.2	8,321.5	7,783.1
- Desktops	1,006.8	791.6	743.2	651.0	605.0	530.4
- Portable Computers	9,781.6	8,937.9	8,619.1	8,104.2	7,716.5	7,252.7
-- Laptops	3,665.2	3,576.5	3,638.3	3,454.6	3,335.5	3,231.4
-- Tablets	6,116.4	5,361.4	4,980.7	4,649.5	4,381.0	4,021.3
Peripherals	2,900.5	2,832.6	2,864.9	2,823.4	2,742.3	2,636.4
- Monitors	558.3	605.2	627.2	655.1	668.5	643.3
- Printers	2,342.2	2,227.4	2,237.7	2,168.3	2,073.8	1,993.1
Computers and Peripherals	13,688.8	12,562.1	12,227.1	11,578.6	11,063.8	10,419.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	4,632.9	4,382.1	4,255.4	4,089.3	4,019.9	3,889.7
- Desktops	436.7	386.7	356.7	310.4	284.3	248.0
- Portable Computers	4,196.2	3,995.4	3,898.7	3,779.0	3,735.6	3,641.7
-- Laptops	2,559.9	2,609.5	2,574.4	2,513.4	2,537.8	2,534.8
-- Tablets	1,636.3	1,385.9	1,324.2	1,265.6	1,197.9	1,106.9
Peripherals	582.2	576.6	565.9	560.9	555.3	541.6
- Monitors	105.4	121.9	135.1	150.2	159.9	161.1
- Printers	476.7	454.7	430.7	410.7	395.4	380.5
Computers and Peripherals	5,215.1	4,958.7	4,821.3	4,650.2	4,575.2	4,431.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-6.5	-6.3	-27.9

- Desktops	-12.3	-12.0	-47.3
- Portable Computers	-6.0	-5.8	-25.9
-- Laptops	-3.1	-2.5	-11.8
-- Tablets	-8.2	-8.0	-34.3
Peripherals	-3.9	-1.9	-9.1
- Monitors	-3.8	2.9	15.2
- Printers	-3.9	-3.2	-14.9
Computers and Peripherals	-5.8	-5.3	-23.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-3.2	-3.4	-16.0
- Desktops	-12.8	-10.7	-43.2
- Portable Computers	-2.5	-2.8	-13.2
-- Laptops	-0.1	-0.2	-1.0
-- Tablets	-7.6	-7.5	-32.4
Peripherals	-2.5	-1.4	-7.0
- Monitors	0.8	8.9	52.8
- Printers	-3.8	-4.4	-20.2
Computers and Peripherals	-3.1	-3.2	-15.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	4,916.8	4,980.6	5,156.6	4,994.8	5,020.8	4,971.5
- Desktops	2,350.4	2,407.8	2,450.7	2,263.2	2,202.8	2,107.8
- Portable Computers	2,566.4	2,572.8	2,705.9	2,731.6	2,818.1	2,863.7
-- Laptops	1,985.0	1,913.6	1,943.8	1,867.3	1,898.5	1,915.4
-- Tablets	581.3	659.2	762.1	864.3	919.6	948.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	1,615.3	1,648.9	1,738.6	1,710.9	1,741.0	1,748.1
- Desktops	634.3	656.7	677.4	631.5	618.3	594.0
- Portable Computers	980.9	992.2	1,061.3	1,079.5	1,122.7	1,154.1
-- Laptops	839.2	828.2	868.6	856.4	881.9	903.1
-- Tablets	141.8	164.0	192.7	223.1	240.8	251.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.0	0.2	1.1
- Desktops	-4.3	-2.2	-10.3
- Portable Computers	1.6	2.2	11.6
-- Laptops	0.9	-0.7	-3.5
-- Tablets	3.1	10.3	63.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	0.4	1.6	8.2
- Desktops	-3.9	-1.3	-6.4
- Portable Computers	2.8	3.3	17.7
-- Laptops	2.4	1.5	7.6
-- Tablets	4.3	12.1	77.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	16.0	18.8	21.7
Fixed	84.0	81.2	78.3
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	7.9	12.5	10.3	8.1	8.5	10.0
iOS	25.4	19.2	21.6	25.8	29.1	32.1
Android	66.7	68.3	68.1	66.1	62.4	58.0
BlackBerry OS	-	-	-	-	-	-
Other	-	-	0.0	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Apple France SARL	10.3	11.3	13.1	14.6	15.6
Hewlett-Packard France	17.3	18.4	17.3	16.5	15.6
Samsung Electronics France	12.3	10.7	10.6	11.4	12.2
Lenovo France SAS	7.4	8.3	8.9	9.1	9.6
Asus France Sarl	11.8	10.9	9.3	8.1	7.2
Dell France SA	4.1	4.6	5.0	5.3	5.5
Epson Europe BV	3.8	4.1	4.3	4.6	5.0
Acer Computer France SAS	8.9	7.8	7.1	5.7	4.1
Canon France SA	3.6	3.7	3.8	3.8	3.9
Microsoft France SA	2.6	2.7	2.9	3.4	3.9
Brother Industries Ltd	2.0	2.1	2.2	2.2	2.3
Huawei Device France	0.2	0.3	0.8	1.2	1.6
Toshiba Systèmes France	1.8	1.8	1.8	1.5	1.2
Amazon France	0.7	1.0	1.0	1.1	1.2
Iiyama France Sarl	0.5	0.6	0.7	0.8	0.8
Philips France SAS	0.6	0.6	0.6	0.7	0.7
Lexmark International Sarl	0.8	0.7	0.7	0.6	0.6
LG Electronics France	0.6	0.6	0.6	0.6	0.6
Group SFIT SAS	0.1	0.3	0.4	0.4	0.4
Archos SA	1.0	0.7	0.5	0.4	0.4
BenQ Corp	0.3	0.3	0.3	0.3	0.3
AOC International (Europe) BV	0.2	0.2	0.2	0.2	0.2
MSI Computer SARL	-	0.0	0.1	0.1	0.1
ViewSonic Europe Ltd	0.1	0.1	0.1	0.1	0.1
Google Inc	0.1	0.1	0.0	0.0	-
Sony France SA	0.3	0.1	0.0	0.0	-
Haier Europe Trading Srl	0.1	0.0	0.0	0.0	-
Fujitsu Siemens Computers SAS	0.2	0.1	-	-	-
Hyundai IT Europe GmbH	0.0	-	-	-	-
BlackBerry France SAS	-	-	-	-	-
Others	8.1	7.9	7.7	7.4	6.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard France	18.2	17.0	16.3	15.4
iPad (Apple Inc)	Apple France SARL	8.8	10.4	11.5	12.4
Samsung (Samsung Corp)	Samsung Electronics France	10.7	10.6	11.4	12.2
Lenovo (Lenovo Group Ltd)	Lenovo France SAS	8.3	8.9	9.1	9.6
Asus (AsusTek Computer Inc)	Asus France Sarl	10.9	9.3	8.1	7.2
Dell (Dell Technologies Inc)	Dell France SA	4.6	5.0	5.3	5.5
Epson (Seiko Epson)	Epson Europe BV	4.1	4.3	4.6	5.0

Corp)					
Acer (Acer Inc)	Acer Computer France SAS	7.8	7.1	5.7	4.1
Canon (Canon Inc)	Canon France SA	3.7	3.8	3.8	3.9
Microsoft Surface (Microsoft Corp)	Microsoft France SA	2.7	2.9	3.4	3.9
MacBook (Apple Inc)	Apple France SARL	2.1	2.4	2.7	2.9
Brother	Brother Industries Ltd	2.1	2.2	2.2	2.3
Huawei (Huawei Technologies Co Ltd)	Huawei Device France	0.3	0.8	1.2	1.6
Toshiba (Toshiba Corp)	Toshiba Systèmes France	1.8	1.8	1.5	1.2
Fire (Amazon.com Inc)	Amazon France	1.0	1.0	1.1	1.2
iiyama (iiyama Electric Co Ltd)	Iiyama France Sarl	0.6	0.7	0.8	0.8
Philips (Koninklijke Philips NV)	Philips France SAS	0.6	0.6	0.7	0.7
Lexmark (Apex Technology Co Ltd)	Lexmark International Sarl	0.7	0.7	0.6	0.6
LG (LG Corp)	LG Electronics France	0.6	0.6	0.6	0.6
Thomson (Technicolor SA)	Group SFIT SAS	0.3	0.4	0.4	0.4
Mac (Apple Inc)	Apple France SARL	0.4	0.4	0.4	0.4
Archos	Archos SA	0.7	0.5	0.4	0.4
BenQ	BenQ Corp	0.3	0.3	0.3	0.3
Samsung (HP Inc)	Hewlett-Packard France	0.2	0.3	0.3	0.2
AOC (TPV Technology Ltd)	AOC International (Europe) BV	0.2	0.2	0.2	0.2
MSI (Micro-Star International Co Ltd)	MSI Computer SARL	0.0	0.1	0.1	0.1
Viewsonic (ViewSonic Corp)	ViewSonic Europe Ltd	0.1	0.1	0.1	0.1
Nexus (Alphabet Inc)	Google Inc	0.1	0.0	0.0	-
Fujitsu (Lenovo Group Ltd)	Fujitsu Siemens Computers SAS	0.1	-	-	-
Vaio (Vaio Corp)	Sony France SA	0.0	-	-	-
Others	Others	8.0	7.7	7.4	6.8
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	68.4	65.8	64.3	62.2	59.9	56.0
- Grocery Retailers	28.9	27.1	25.8	23.9	22.6	21.7
-- Discounters	5.8	5.7	5.4	5.5	5.5	5.5
-- Hypermarkets	21.1	19.6	18.6	16.7	15.4	14.5
-- Supermarkets	2.0	1.8	1.8	1.7	1.7	1.8
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	26.9	26.2	25.8	25.7	25.2	22.1
-- Electronics and Appliance Specialist Retailers	22.9	22.3	22.5	22.5	22.1	19.8
-- Other Non-Grocery Specialists	4.0	3.9	3.4	3.2	3.1	2.3

- Mixed Retailers	12.6	12.6	12.7	12.5	12.1	12.2
Non-Store Retailing	31.6	34.2	35.7	37.8	40.1	44.0
- Direct Selling	-	-	-	-	-	-
- Homeshopping	0.9	0.6	0.4	0.4	0.4	0.4
- E-Commerce	30.7	33.6	35.3	37.5	39.7	43.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	7,783.1	7,339.7	6,808.7	6,211.9	5,533.6	4,778.8
- Desktops	530.4	488.5	445.4	401.9	359.8	320.9
- Portable Computers	7,252.7	6,851.2	6,363.2	5,810.0	5,173.9	4,457.9
-- Laptops	3,231.4	3,090.2	2,949.3	2,808.5	2,667.6	2,526.4
-- Tablets	4,021.3	3,761.1	3,414.0	3,001.6	2,506.3	1,931.5
Peripherals	2,636.4	2,613.0	2,603.8	2,609.8	2,630.9	2,667.0
- Monitors	643.3	655.6	671.2	691.1	715.6	744.6
- Printers	1,993.1	1,957.4	1,932.6	1,918.7	1,915.3	1,922.4
Computers and Peripherals	10,419.4	9,952.8	9,412.5	8,821.7	8,164.5	7,445.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	3,889.7	3,700.7	3,464.7	3,191.9	2,872.9	2,530.6
- Desktops	248.0	226.2	202.9	179.9	157.9	137.7
- Portable Computers	3,641.7	3,474.5	3,261.8	3,011.9	2,715.0	2,392.9
-- Laptops	2,534.8	2,445.9	2,336.6	2,207.4	2,049.2	1,887.4
-- Tablets	1,106.9	1,028.5	925.2	804.5	665.8	505.5
Peripherals	541.6	536.5	535.4	534.5	536.6	541.4
- Monitors	161.1	168.8	176.9	185.8	195.9	208.3
- Printers	380.5	367.7	358.5	348.8	340.6	333.1
Computers and Peripherals	4,431.3	4,237.1	4,000.1	3,726.4	3,409.4	3,072.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-5.7	-9.3	-38.6
- Desktops	-7.9	-9.6	-39.5
- Portable Computers	-5.5	-9.3	-38.5
-- Laptops	-4.4	-4.8	-21.8
-- Tablets	-6.5	-13.6	-52.0
Peripherals	-0.9	0.2	1.2

- Monitors	1.9	3.0	15.8
- Printers	-1.8	-0.7	-3.5
Computers and Peripherals	-4.5	-6.5	-28.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-4.9	-8.2	-34.9
- Desktops	-8.8	-11.1	-44.5
- Portable Computers	-4.6	-8.1	-34.3
-- Laptops	-3.5	-5.7	-25.5
-- Tablets	-7.1	-14.5	-54.3
Peripherals	-0.9	0.0	0.0
- Monitors	4.8	5.3	29.3
- Printers	-3.4	-2.6	-12.4
Computers and Peripherals	-4.4	-7.1	-30.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	4,971.5	4,991.1	5,024.9	5,063.4	5,106.1	5,151.1
- Desktops	2,107.8	2,050.8	2,001.1	1,961.2	1,929.0	1,904.4
- Portable Computers	2,863.7	2,940.3	3,023.8	3,102.1	3,177.1	3,246.6
-- Laptops	1,915.4	1,911.5	1,914.6	1,912.8	1,907.9	1,897.7
-- Tablets	948.3	1,028.8	1,109.2	1,189.3	1,269.2	1,348.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	1,748.1	1,739.2	1,731.6	1,716.3	1,712.5	1,705.0
- Desktops	594.0	571.6	552.7	527.1	516.9	507.5
- Portable Computers	1,154.1	1,167.6	1,178.9	1,189.2	1,195.6	1,197.5
-- Laptops	903.1	896.7	889.1	880.5	867.0	849.7
-- Tablets	251.0	271.0	289.8	308.7	328.6	347.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.4	0.7	3.6
- Desktops	-2.7	-2.0	-9.6
- Portable Computers	2.7	2.5	13.4
-- Laptops	-0.2	-0.2	-0.9
-- Tablets	8.5	7.3	42.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-0.5	-0.5	-2.5
- Desktops	-3.8	-3.1	-14.6
- Portable Computers	1.2	0.7	3.8
-- Laptops	-0.7	-1.2	-5.9
-- Tablets	8.0	6.7	38.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	21.7	24.4	26.8	29.0	31.2	33.9
Fixed	78.3	75.6	73.2	71.0	68.8	66.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	10.0	11.3
iOS	32.1	35.1
Android	58.0	53.6
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in the United Kingdom

Euromonitor International

August 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Covid-19 drives new growth, particularly for peripherals	1
Desktops lose relevance as laptops progress	1
Apple retains leadership, but cedes some share to smaller players	2
RECOVERY AND OPPORTUNITIES	3
Uncertainty set to rock sales as economic challenges beckon	3
Laptops remain most buoyant product area	3
Economic impact hits desktops severely	3
CATEGORY DATA.....	4
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	5
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015- 2020	6
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017- 2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	9
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	10
Table 18 Forecast Sales of Computers by Category: Business Volume 2020- 2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	11
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23 Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN THE UNITED KINGDOM

KEY DATA FINDINGS

- COVID-19 is expected to lead to a spike in growth for computers and peripherals as vast numbers of consumers switch to working from home and are forced to upgrade their home office equipment
- In 2020, retail volume sales will increase by 3% to reach nearly 13 million units
- The most dynamic volume growth in 2020 will be seen in monitors, up by 9% on 2019
- Apple remains the leading player in 2020 with a share of 21%, but faces growing competition from small players offering more affordable home office options
- Volume sales are expected to fall by 3% CAGR to 2025 as the 2020 surge leads to a slowdown in replacement purchases, exacerbated by a challenging economic environment.

2020 IMPACT

Covid-19 drives new growth, particularly for peripherals

COVID-19 is forecast to have a strong positive impact on sales of computers and peripherals in 2020, with growth accelerating from a decline of 4% in 2019 to positive growth of 3%. Lockdown has forced many to work from home for the foreseeable future, with many UK consumers unsure of when they will be able to return to work. As a result an increase in demand for home office products was visible during these months as companies and consumers set themselves up for remote working. All categories of computers and peripherals are showing improved volume sales in 2020, with many categories turning a decline in 2019 into positive growth in 2020.

This has been particularly evident for monitors and printers, which many consumers did not already own and which many companies would not provide. Prior to 2020, volume sales of monitors had shown rapid decline as lifestyles shifted and consumers spent more time on the move, prioritising portable options such as laptops, tablets and phones over separate peripherals. However the increase in remote working which ramped up dramatically in light of the pandemic is leading many consumers to invest in a monitor for their home office.

Printers are facing similar constraints and growth factors. Prior to the lockdown, the use of smartphones and tablets was encouraging a shift to paperless living, with the printing of tickets for flights, concerts and other events no longer necessary. This was highly damaging for printer manufacturers and their sales. However, like monitors, demand for printers has started to benefit from the growing number of employees working from home, with retail volume decline turning to positive growth in 2020 as more consumers invested in these products.

Desktops lose relevance as laptops progress

Laptops are also set to benefit from the impact of COVID-19, with volume sales expected to be up 5% in 2020 compared to a decline of 1% in 2019. The lack of entertainment during lockdown led many consumers to upgrade their selection of digital devices to allow them to continue working, socialising and entertaining themselves. In most cases, consumers opted for portable options, primarily laptops, which allow for more flexibility, over desktops.

Desktops are the only category that are set to record volume decline in 2020, with retail sales down by 2% (compared to much deeper decline of 7% in 2019). As laptop technology advances, offering improved functionality and processing speeds at increasingly affordable prices, these are becoming the preferred computer option for consumers and businesses alike. The growing power and availability of smartphones offering improved functionality in areas such as research and shopping alike also contributed to desktops increasingly being viewed as outdated technology in the eyes of the average consumer.

Sales of tablets, while set to show slight positive growth in 2020 due to COVID-19, also showed a negative long term trend, with competition stemming both from larger sized smartphones, and from 2-in-1 convertible laptops.

Apple retains leadership, but cedes some share to smaller players

Apple will remain the leading player in 2020 with a share of 21%, down from 23% in 2019, followed by HP with 13%, up on 12% in 2019. Both leading players benefit from a strong image and reputation for reliability, particularly important during lockdown. HP has also benefited from its broad price range.

Apple Computer UK Ltd succeeded in maintaining its top position in computers and peripherals in 2020 with a retail volume share almost double that of its closest competitor Hewlett-Packard. This strong position is due to its presence in computers, particularly tablets and laptops. Apple's impressive range of iPad tablets and MacBook laptops continues to appeal, with many Apple consumers being highly brand loyal. The biggest factor behind the company's consistent lead is however a focus on new product development on an annual basis, thus ensuring consumers maintain interest in the product. In 2019, Apple launched upgraded versions of the 13 and 15-inch MacBook with an improved performance and two upgraded versions of iPad, the mini and 10.5-inch. Although yearly upgrades to its range tend to offer only minor improvements, these are enough to maintain interest in the brand and keep Apple at the top.

While Apple faces share erosion, Lenovo and Microsoft have managed to increase their share. Lenovo is seeing share gain thanks to ongoing innovation and a clear focus on business and consumer needs. Lenovo was a pioneer in convertible laptops with its rotating-screen Lenovo Yoga range, which remains hugely popular, and benefited from the launch of the C930 model towards the end of the review period with an integrated stylus and improved design with new hinge. Lenovo thus continues to benefit from a general shift from fixed to convertible laptops. The company targeted gamers with its Lenovo Legion Y530, offering a competitive price and slim and sturdy construction in addition to HD gaming capability. Targeting business users, the Lenovo ThinkPad X1 Extreme offers an impressive Dolby Vision HDR 4K touchscreen and light weight. The company also offered the Lenovo ThinkCentre M720q in business desktops, offering strong security and a wide range of at-purchase configuration options in addition to a compact, rugged and easily-serviced structure, numerous ports and quiet running.

Microsoft continues to gain share and grow sales in tablets, its sole significant product area in consumer electronics, while improving its position in overall computers and peripherals. The company's Microsoft Surface range continues to garner high praise from reviewers, with its Microsoft Surface Pro notably taking on laptops with its offer of 12 inch models that can be operated using a stylus and docking keyboard. Microsoft Surface Pro 6 launched towards the end of the review period, offering an impressively fast Intel processor and long battery life, while Microsoft Surface Go offered a low-cost and high-quality entry point to the range in addition to a small and lightweight design. This model is particularly designed to appeal to frequent travellers and students. Microsoft Surface also benefits from its offer of attractively priced bundling offers, notably including back-to-school deals.

Many smaller players are also increasing their sales following the impact of COVID-19, as the increased need for digital products is proving beneficial for smaller, more affordable brands.

RECOVERY AND OPPORTUNITIES

Uncertainty set to rock sales as economic challenges beckon

After a peak in volume sales in 2020, computers and peripherals will return to volume decline, with a forecast CAGR of 3% to 2025 showing a worsening performance than the 2% overall decline evident during the review period.

The rush to purchase home office equipment in 2020 will mean a lower level of replacement purchases over the following few years. This will be exacerbated by the impact of economic downturn, with many consumers needing to weigh the significance of each major purchase.

Concurrently however, the market will be buoyed as the working from home culture beds in, with many more consumers opting to continue this method of working after lockdown ends. This is likely to lead to many home workers investing in upgraded equipment as they accept that working home is now their way of life. This will primarily benefit laptops, which will be central to most home offices, and monitors, as home workers aim to make their home work spaces more comfortable and professional.

Laptops remain most buoyant product area

Laptops, like all categories, is forecast to register volume decline over the forecast period, but this will be at a much less severe level than that seen in other categories, with sales falling by only 1% CAGR to 2025.

Laptops will be the primary choice of the home worker, benefitting from widening interest in 2-in-1 convertible laptops with tablet functionality such as touchscreens. Although laptops are also showing retail volume decline, sales are remaining relatively steady in comparison to tablets, with laptops benefiting from many replacing fixed laptops with convertible 2-in-1 models. This trend is expected to continue throughout the forecast period, with convertible models expanding their share of overall laptop sales year on year.

Business laptop sales show similar patterns to those seen in retail, with tablets suffering a rapid decline in demand. Businesses and employees will increasingly show a preference for laptops as working remotely becomes easier and more common. Laptops offer high processing rates, similar to desktops, thus allowing work to be handled more efficiently in comparison to tablets. Laptops are also becoming easier to carry around, with the use of laptops partnered with monitors and docking stations in offices thus being seen as more cost-efficient and effective than investing in desktops. The main difference between business and retail sales trends is that laptops are recording overall marginal growth in terms of business volume, being the preferred computer for work.

Economic impact hits desktops severely

By contrast, desktops are expected to see a deep decline of 11% CAGR in volume terms to 2025, due to the improved processing rates in laptops which will eradicate the core advantage of the desktop. This will be exacerbated by decreasing spending power as most consumers look for multifunctional products such as convertible laptops.

Gamers however are still likely to use desktops, although it is likely that even this consumer group will show diminishing interest in desktops in the forecast period, as gamers are becoming increasingly likely to buy spare parts and build computers themselves to suit their personal needs.

Tablets will also continue to struggle, falling between two stools as convertible laptops and larger smartphones continue to increase in popularity.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	11,590.2	11,234.2	10,797.7	10,580.8	10,231.0	10,419.2
- Desktops	1,172.6	1,060.0	929.6	867.8	806.1	789.0
- Portable Computers	10,417.6	10,174.2	9,868.1	9,712.9	9,424.9	9,630.3
-- Laptops	4,116.1	4,004.9	3,876.0	3,831.0	3,782.9	3,957.9
-- Tablets	6,301.6	6,169.2	5,992.2	5,881.9	5,641.9	5,672.4
Peripherals	2,410.1	2,668.7	2,544.6	2,404.5	2,303.0	2,471.1
- Monitors	1,532.9	1,836.5	1,748.1	1,634.3	1,560.7	1,693.5
- Printers	877.2	832.2	796.5	770.1	742.2	777.6
Computers and Peripherals	14,000.4	13,902.9	13,342.3	12,985.2	12,534.0	12,890.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

GBP million	2015	2016	2017	2018	2019	2020
Computers	4,051.1	4,135.4	4,151.1	4,193.0	4,191.2	4,436.2
- Desktops	576.8	592.2	549.0	513.6	498.8	509.3
- Portable Computers	3,474.3	3,543.2	3,602.1	3,679.4	3,692.4	3,926.9
-- Laptops	1,605.9	1,594.5	1,623.5	1,682.1	1,722.7	1,873.4
-- Tablets	1,868.4	1,948.8	1,978.6	1,997.3	1,969.7	2,053.5
Peripherals	245.2	282.0	276.2	270.1	264.9	294.1
- Monitors	169.9	213.7	210.6	206.5	202.5	227.4
- Printers	75.2	68.3	65.6	63.6	62.4	66.8
Computers and Peripherals	4,296.3	4,417.4	4,427.3	4,463.1	4,456.2	4,730.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	1.8	-2.1	-10.1
- Desktops	-2.1	-7.6	-32.7
- Portable Computers	2.2	-1.6	-7.6
-- Laptops	4.6	-0.8	-3.8
-- Tablets	0.5	-2.1	-10.0
Peripherals	7.3	0.5	2.5
- Monitors	8.5	2.0	10.5
- Printers	4.8	-2.4	-11.4
Computers and Peripherals	2.8	-1.6	-7.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	5.8	1.8	9.5
- Desktops	2.1	-2.5	-11.7
- Portable Computers	6.3	2.5	13.0
-- Laptops	8.7	3.1	16.7
-- Tablets	4.3	1.9	9.9
Peripherals	11.0	3.7	20.0
- Monitors	12.3	6.0	33.8
- Printers	7.0	-2.4	-11.3
Computers and Peripherals	6.2	1.9	10.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	6,643.2	6,150.7	5,952.6	6,045.7	5,912.2	6,209.1
- Desktops	2,679.4	2,400.8	2,315.1	2,412.1	2,320.8	2,355.4
- Portable Computers	3,963.7	3,750.0	3,637.5	3,633.7	3,591.4	3,853.7
-- Laptops	3,131.6	2,931.5	2,812.2	2,830.5	2,844.8	3,087.3
-- Tablets	832.1	818.5	825.4	803.2	746.6	766.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

GBP million	2015	2016	2017	2018	2019	2020
Computers	2,399.9	2,170.1	2,147.1	2,186.6	2,192.6	2,235.6
- Desktops	972.6	863.9	823.7	839.9	820.3	802.3
- Portable Computers	1,427.3	1,306.2	1,323.4	1,346.7	1,372.3	1,433.3
-- Laptops	1,181.1	1,057.8	1,065.9	1,083.2	1,109.6	1,172.8
-- Tablets	246.2	248.4	257.5	263.6	262.7	260.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	5.0	-1.3	-6.5
- Desktops	1.5	-2.5	-12.1
- Portable Computers	7.3	-0.6	-2.8

-- Laptops	8.5	-0.3	-1.4
-- Tablets	2.7	-1.6	-7.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	2.0	-1.4	-6.8
- Desktops	-2.2	-3.8	-17.5
- Portable Computers	4.4	0.1	0.4
-- Laptops	5.7	-0.1	-0.7
-- Tablets	-0.8	1.1	5.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	23.0	27.0	29.0
Fixed	77.0	73.0	71.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	13.4	16.3	17.7	17.4	18.3	19.8
iOS	33.2	28.8	30.7	35.4	38.1	36.4
Android	53.3	54.9	51.6	47.2	43.6	43.8
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Apple Computer UK Ltd	16.8	17.9	21.5	22.5	21.4
Hewlett-Packard (UK) Ltd	11.5	12.2	12.2	12.4	12.6
Lenovo Technology UK Ltd	7.2	7.7	8.0	8.2	8.3
Acer UK Ltd	7.8	7.8	7.5	7.6	7.6
Samsung Electronics	8.7	7.8	7.3	6.9	7.1

(UK) Ltd					
Amazon.com Inc	4.4	5.9	6.6	6.9	7.0
Microsoft Corp	3.4	4.2	4.8	5.2	5.5
Asus UK Ltd	5.2	5.1	5.1	5.3	5.4
Dell Computer EEIG	5.0	5.0	5.0	4.9	5.0
Toshiba (UK) Ltd	2.8	2.7	2.5	2.3	2.3
Google Inc	2.2	2.1	1.9	1.7	1.6
Canon (UK) Ltd	1.4	1.4	1.4	1.4	1.4
LG Electronics UK Ltd	1.5	1.4	1.4	1.3	1.4
Novatech Ltd	1.0	1.1	1.1	1.1	1.1
Huawei Technologies (UK) Co Ltd	0.8	1.0	1.2	0.9	0.8
Epson UK Ltd	0.8	0.8	0.8	0.8	0.8
Philips Consumer Electronics UK Ltd	0.8	0.8	0.7	0.7	0.7
AOC UK Ltd	0.7	0.7	0.7	0.7	0.7
ViewSonic Europe Ltd	0.6	0.6	0.5	0.5	0.6
Brother UK Ltd	0.5	0.5	0.5	0.5	0.5
Fujitsu Europe Ltd	0.3	0.2	0.1	0.2	0.2
DSG International Plc	0.6	0.6	0.2	0.2	0.2
Lexmark International UK Ltd	0.1	0.1	0.1	0.1	0.1
Fuji Photo Film (UK) Ltd	0.1	0.1	0.1	0.1	0.1
Sony Europe Ltd	0.1	0.1	0.1	0.1	0.1
Best Tablet Co Ltd	0.1	0.1	0.0	0.0	-
Kodak Ltd	0.0	0.0	0.0	0.0	-
Tesco Plc	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-
BlackBerry UK	-	-	-	-	-
Other Private Label	0.0	0.0	0.0	0.0	0.0
Others	15.5	12.0	8.6	7.4	7.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
iPad (Apple Inc)	Apple Computer UK Ltd	13.8	16.1	17.1	16.0
HP (HP Inc)	Hewlett-Packard (UK) Ltd	11.9	11.9	12.1	12.3
Lenovo (Lenovo Group Ltd)	Lenovo Technology UK Ltd	7.7	8.0	8.2	8.3
Samsung (Samsung Corp)	Samsung Electronics (UK) Ltd	7.8	7.3	6.9	7.1
Fire	Amazon.com Inc	5.9	6.6	6.9	7.0
Microsoft Surface	Microsoft Corp	4.2	4.8	5.2	5.5
Asus (AsusTek Computer Inc)	Asus UK Ltd	5.1	5.1	5.3	5.4
Dell (Dell Technologies Inc)	Dell Computer EEIG	5.0	5.0	4.9	5.0
MacBook (Apple Inc)	Apple Computer UK Ltd	3.5	4.4	4.5	4.5
Acer (Acer Inc)	Acer UK Ltd	4.2	4.1	4.1	4.0
Packard Bell (Acer Inc)	Acer UK Ltd	3.6	3.4	3.5	3.6
Toshiba (Toshiba Corp)	Toshiba (UK) Ltd	2.7	2.5	2.3	2.3
Nexus (Alphabet Inc)	Google Inc	2.1	1.9	1.7	1.6

Canon (Canon Inc)	Canon (UK) Ltd	1.4	1.4	1.4	1.4
LG (LG Corp)	LG Electronics UK Ltd	1.4	1.4	1.3	1.4
Novatech	Novatech Ltd	1.1	1.1	1.1	1.1
Mac (Apple Inc)	Apple Computer UK Ltd	0.6	1.1	0.9	0.9
Huawei (Huawei Technologies Co Ltd)	Huawei Technologies (UK) Co Ltd	1.0	1.2	0.9	0.8
Epson (Seiko Epson Corp)	Epson UK Ltd	0.8	0.8	0.8	0.8
Philips (Koninklijke Philips NV)	Philips Consumer Electronics UK Ltd	0.8	0.7	0.7	0.7
AOC (TPV Technology Ltd)	AOC UK Ltd	0.7	0.7	0.7	0.7
Viewsonic (ViewSonic Corp)	ViewSonic Europe Ltd	0.6	0.5	0.5	0.6
Brother (Brother Industries Ltd)	Brother UK Ltd	0.5	0.5	0.5	0.5
Samsung (HP Inc)	Hewlett-Packard (UK) Ltd	0.3	0.3	0.3	0.3
Fujitsu (Lenovo Group Ltd)	Fujitsu Europe Ltd	0.2	0.1	0.2	0.2
Advent (Private Label)	DSG International Plc	0.6	0.2	0.2	0.2
Lexmark (Apex Technology Co Ltd)	Lexmark International UK Ltd	0.1	0.1	0.1	0.1
FujiFilm (Fujifilm Holdings Corp)	Fuji Photo Film (UK) Ltd	0.1	0.1	0.1	0.1
Sony (Sony Corp)	Sony Europe Ltd	0.1	0.1	0.1	0.1
BTC	Best Tablet Co Ltd	0.1	0.0	0.0	-
Other Private Label (Private Label)	Other Private Label	0.0	0.0	0.0	0.0
Others	Others	12.0	8.6	7.4	7.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	70.0	68.7	67.3	65.5	64.0	44.3
- Grocery Retailers	10.7	11.3	11.3	11.2	11.2	11.0
-- Discounters	2.1	2.0	1.9	1.9	1.9	1.5
-- Hypermarkets	7.0	7.8	8.0	8.0	8.0	8.2
-- Supermarkets	1.6	1.5	1.4	1.3	1.3	1.3
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	53.3	51.5	50.2	48.7	47.6	30.2
-- Electronics and Appliance Specialist Retailers	51.8	50.5	49.3	47.0	45.8	29.2
-- Other Non-Grocery Specialists	1.5	1.0	0.9	1.7	1.8	1.0
- Mixed Retailers	6.0	5.9	5.8	5.6	5.3	3.1
Non-Store Retailing	30.0	31.3	32.7	34.5	36.0	55.7
- Direct Selling	-	-	-	-	-	-
- Homeshopping	0.3	0.1	0.1	0.0	0.0	0.1
- E-Commerce	29.7	31.2	32.6	34.5	36.0	55.6
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	10,419.2	10,146.3	9,890.2	9,643.0	9,362.7	9,059.7
- Desktops	789.0	701.3	631.1	565.5	500.8	439.9
- Portable Computers	9,630.3	9,445.1	9,259.1	9,077.4	8,861.9	8,619.9
-- Laptops	3,957.9	3,940.6	3,907.8	3,866.2	3,808.0	3,738.3
-- Tablets	5,672.4	5,504.5	5,351.3	5,211.2	5,053.9	4,881.6
Peripherals	2,471.1	2,405.6	2,354.8	2,300.6	2,234.3	2,169.0
- Monitors	1,693.5	1,654.3	1,624.6	1,588.0	1,541.9	1,499.9
- Printers	777.6	751.3	730.2	712.7	692.3	669.0
Computers and Peripherals	12,890.3	12,551.9	12,245.0	11,943.6	11,596.9	11,228.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

GBP million	2020	2021	2022	2023	2024	2025
Computers	4,436.2	4,393.5	4,338.6	4,279.7	4,206.3	4,119.5
- Desktops	509.3	465.7	430.0	391.1	352.5	312.8
- Portable Computers	3,926.9	3,927.8	3,908.6	3,888.6	3,853.7	3,806.6
-- Laptops	1,873.4	1,899.5	1,912.8	1,915.9	1,904.9	1,881.9
-- Tablets	2,053.5	2,028.3	1,995.8	1,972.7	1,948.8	1,924.7
Peripherals	294.1	287.8	284.4	280.8	275.3	268.9
- Monitors	227.4	223.7	222.1	219.9	215.6	211.3
- Printers	66.8	64.2	62.3	61.0	59.7	57.5
Computers and Peripherals	4,730.3	4,681.3	4,623.0	4,560.5	4,481.6	4,388.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-2.6	-2.8	-13.0
- Desktops	-11.1	-11.0	-44.2
- Portable Computers	-1.9	-2.2	-10.5
-- Laptops	-0.4	-1.1	-5.5
-- Tablets	-3.0	-3.0	-13.9
Peripherals	-2.7	-2.6	-12.2
- Monitors	-2.3	-2.4	-11.4
- Printers	-3.4	-3.0	-14.0
Computers and Peripherals	-2.6	-2.7	-12.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-1.0	-1.5	-7.1
- Desktops	-8.6	-9.3	-38.6
- Portable Computers	0.0	-0.6	-3.1
-- Laptops	1.4	0.1	0.5
-- Tablets	-1.2	-1.3	-6.3
Peripherals	-2.1	-1.8	-8.6
- Monitors	-1.6	-1.5	-7.1
- Printers	-3.9	-2.9	-13.8
Computers and Peripherals	-1.0	-1.5	-7.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	6,209.1	6,246.9	6,210.1	6,162.2	6,125.5	6,076.4
- Desktops	2,355.4	2,318.2	2,249.3	2,170.5	2,108.0	2,042.2
- Portable Computers	3,853.7	3,928.7	3,960.8	3,991.8	4,017.6	4,034.2
-- Laptops	3,087.3	3,170.4	3,229.2	3,273.3	3,304.0	3,322.2
-- Tablets	766.4	758.3	731.6	718.5	713.5	712.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

GBP million	2020	2021	2022	2023	2024	2025
Computers	2,235.6	2,209.4	2,185.9	2,165.3	2,161.9	2,147.0
- Desktops	802.3	770.9	740.4	711.5	691.8	671.4
- Portable Computers	1,433.3	1,438.5	1,445.5	1,453.8	1,470.1	1,475.5
-- Laptops	1,172.8	1,182.4	1,194.3	1,205.7	1,220.9	1,224.8
-- Tablets	260.5	256.1	251.2	248.1	249.1	250.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.6	-0.4	-2.1
- Desktops	-1.6	-2.8	-13.3
- Portable Computers	1.9	0.9	4.7
-- Laptops	2.7	1.5	7.6
-- Tablets	-1.1	-1.5	-7.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-1.2	-0.8	-4.0
- Desktops	-3.9	-3.5	-16.3
- Portable Computers	0.4	0.6	2.9
-- Laptops	0.8	0.9	4.4
-- Tablets	-1.7	-0.8	-3.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	29.0	32.0	33.0	36.0	39.0	41.0
Fixed	71.0	68.0	67.0	64.0	61.0	59.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	19.8	20.6
iOS	36.4	34.6
Android	43.8	44.8
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in the Netherlands

Euromonitor International

September 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Coronavirus (COVID-19) sees spike in sales of computers and peripherals as consumers shift to at-home work and study.....	1
Migration to new operating system sustains growth in business volume sales.....	1
Apple leads focus on laptops for innovation and new product development.....	2
RECOVERY AND OPPORTUNITIES	2
High-end laptops offer value growth potential, although economic concerns in the wake of COVID-19 may slow demand	2
Tablets is set to face intense challenges from increasingly versatile and user-friendly laptops and smartphones	3
Infrastructure upgrades and IT security concerns are expected to push business volume sales in A changing environment	3
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10

Table 21	Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22	Forecast Sales of Laptops by Form Factor 2020-2025	10
Table 23	Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN THE NETHERLANDS

KEY DATA FINDINGS

- COVID-19 fosters short-lived spike in sales as consumers shift to working and studying from home in 2020
- In 2020 retail volume sales of computers and peripherals fall by 4% to reach 3.7 million units
- Laptops sees the slowest retail volume sales decline of 2% in 2020
- Apple Computer Benelux leads computers in 2020 while Hewlett-Packard Nederland tops peripherals
- A negative 4% retail volume CAGR is expected in computers and peripherals over the forecast period to reach 2.9 million units in 2025

2020 IMPACT

Coronavirus (COVID-19) sees spike in sales of computers and peripherals as consumers shift to at-home work and study

All computers and peripherals are expected to see retail volume sales decline over 2020 as a whole. Maturity has increasingly restricted demand and prioritised replacement purchases for many consumers in the Netherlands. However, as the Coronavirus (COVID-19) outbreak led to a strict lockdown, there was a leap in sales of computers and peripherals as consumers required laptops, tablets, printers and monitors to work, study or play from home as offices and educational institutions closed. The immediate lockdown period raised the demand for laptops and tablets, especially among students and at-home workers. While some consumers are likely to be buying computers, printers and monitors to ensure they have the tools to work from home, some companies are part or fully funding purchases. Meanwhile, programmes to loan laptops/tablets have enabled certainly lower-income students to follow online lessons and courses during lockdown. Consumers facing salary cuts and unemployment have increased the need for such assistance. While a further shift to the already strong e-commerce channel was visible in the early lockdown period, smartphones fulfil online ordering needs relatively cheaply and easily, thereby lessening the need for a computer for this purpose. The spike in demand for computers and peripherals is likely to have been short-lived and is unlikely to offset the general maturity in the category over 2020 as a whole.

Migration to new operating system sustains growth in business volume sales

The performance of computers faces a number of challenges, and the category is projected to see a further retail volume sales decline over 2020 as a whole. This is mainly due to weakening demand from retail consumers, although businesses continue to drive growth in the category. Consumers are increasingly shifting from PCs (desktops) to tablets and smartphones. However, this long-term trend is not directly related to COVID-19. On the other hand, PC shipments are expected to drop over 2020 as a whole, due to the impact of COVID-19 in the Netherlands. The shortage of CPUs (central processing units) has a negative impact on the entire category, especially on entry-level products aimed at consumers. Intel had a shortage of CPU/computer

chips from late 2019 through to April 2020. This had a strong impact on lower-priced products in particular, thereby hitting retail sales hard. The higher prices of memory chips due to the trade war between the US and China affected electronics companies, thereby contributing to the CPU shortage and impacting costs for lower-priced products aimed at consumers.

The anticipated growth in business volume sales of desktops over 2020 as a whole, for the first time since 2014, is due to upgrades to Windows 10, or rather that the support for Windows 7 will expire by 2020 and companies will have to migrate to the new operating system before then, which often involves new hardware. Therefore, even though the COVID-19 lockdown has hit businesses hard, many will have to upgrade computers due to a lack of support for Windows 7. Meanwhile, 2020 also saw the introduction of some of the first 5G PCs. The largest PC OEMs, Dell, Hewlett-Packard and Lenovo, have all released 5G PCs. This confirmed the prediction that 2020 would be the year in which 5G PCs became a reality. This also supported business sales.

Apple leads focus on laptops for innovation and new product development

Apple Computer Benelux is expected to remain the leading player in computers and peripherals in retail volume share terms over 2020 as a whole. The company is strongest in tablets, although it remains a major player in laptops and desktops. Following major new releases, such as iPad 9.7, and iPad mini 5, in late 2018 and 2019, respectively, Apple is set to release a new version of MacBook. Apple's request for a "portable personal computer" has been approved by the relevant commission. The latest laptop features the new scissor-switch keyboard also encountered on the new 16ins MacBook Pro. Every other laptop being sold by the company features less reliable butterfly keys. Rival companies are also focusing innovation and new product development on laptops. For example, AsusTek Computer has announced the release of two new laptops in the Vivobook series: Vivobook 14 and Vivobook 15. At CES (annual trade show organised by the Consumer Technology Association), folding, flipping and form-changing PCs featured strongly. Indeed, Intel demonstrated its Horseshow Bend concept, which takes the idea of a foldable PC and blows it up into a 17ins, 4:3 display. Dell has also delivered its own pair of foldable device concepts: the Ori and Duet laptops.

RECOVERY AND OPPORTUNITIES

High-end laptops offer value growth potential, although economic concerns in the wake of COVID-19 may slow demand

Laptops, still the largest category, is set to register the slowest decrease in retail volume sales over 2020 as a whole. Dutch consumers have shown a growing preference for laptops, especially convertibles, which are perceived to offer convenience and versatility. These devices also combine sleek, lightweight designs with powerful processing capabilities and high levels of functionality, which are highly prized attributes for Dutch consumers. There has also been growing interest in higher-end and more technologically advanced laptops, particularly 4K models with OLED displays that are optimised for gaming. Powerful but lightweight gaming laptops were launched by a number of players towards the end of the review period, including products under the MSI and Asus brands. While sales of such high-end products remain quite niche, this demand has helped to soften the downturn caused by general maturity, especially in retail value sales terms. While the outbreak of COVID-19 has diluted interest, this may return to the fore as the lockdown is eased. However, high unemployment rates as furlough schemes end may prevent consumers from spending on premium products into the forecast period.

Tablets is set to face intense challenges from increasingly versatile and user-friendly laptops and smartphones

The growing popularity of large-display smartphones and convertible laptops prior to the lockdown are set to continue to undermine the demand for tablets over the forecast period. More and more Dutch consumers see little or no need for tablets, as they find smartphones with larger displays to be sufficient for web browsing, gaming and watching films. Moreover, there is a preference for convertible laptops, which are perceived to offer advantages in terms of versatility, durability and processing power. The threats these trends pose will intensify as increasing competition renders convertible laptops and large-display smartphones more affordable. The demand for tablets is also set to be negatively affected by foldable smartphones with even larger displays, which started to appear in the Netherlands from late 2019. However, some companies may focus on developing e-commerce distribution and lower-priced products in the short term, at least, to meet the restraints on budgets accentuated by COVID-19.

Infrastructure upgrades and IT security concerns are expected to push business volume sales in A changing environment

Laptops and tablets are projected to post positive business volume sales growth through the forecast period. However, the return to positive growth for desktops over 2020 as a whole, as companies seek to ensure productivity and communication during lockdown, is set to be short-lived. Thus, the general pre-COVID-19 shift from desktops to laptops and tablets in the workplace is predicted to regain momentum. While the decline in business volumes sales of desktops is expected to be slower than over the review period, this is partly due to the long-established nature of this trend. Nonetheless, business volume sales of all computer types are likely to be boosted in the short term, at least, as working from home remains a key means of limiting exposure to the effects of COVID-19.

The fear of a second wave of the virus is likely to see companies err on the side of caution when organising returns to the workplace. Moreover, some companies may have found remote working to be a cost-effective option without significant disruption to production targets, deal making or communication and liaison with staff and partners/clients. While the global pandemic is likely to see economic indicators slow in the short to medium term, companies are expected to continue to invest in upgrading infrastructure, including computers, to meet the demands of a changing business landscape. The migration to Windows 10 and the constant need to upgrade and manage IT security should also help to safeguard the demand for computers among businesses.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	3,402.2	3,371.3	3,344.6	3,220.6	3,101.2	2,979.4
- Desktops	324.1	318.3	307.1	282.0	260.6	239.1
- Portable Computers	3,078.1	3,053.0	3,037.4	2,938.6	2,840.6	2,740.3
-- Laptops	1,565.6	1,548.4	1,572.1	1,515.7	1,471.7	1,440.2
-- Tablets	1,512.5	1,504.6	1,465.3	1,423.0	1,368.9	1,300.1
Peripherals	854.0	808.2	768.0	727.7	706.2	671.7
- Monitors	246.8	238.6	229.2	215.8	202.9	193.7

- Printers	607.2	569.6	538.8	511.9	503.4	478.0
Computers and Peripherals	4,256.2	4,179.5	4,112.6	3,948.3	3,807.5	3,651.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	1,501.5	1,493.1	1,510.5	1,470.2	1,441.9	1,433.6
- Desktops	150.0	145.8	141.9	132.9	126.0	118.5
- Portable Computers	1,351.5	1,347.3	1,368.6	1,337.3	1,316.0	1,315.1
-- Laptops	890.5	893.4	926.0	913.3	910.2	912.7
-- Tablets	461.0	453.9	442.6	423.9	405.8	402.4
Peripherals	95.6	90.6	87.1	85.0	84.1	81.5
- Monitors	24.1	22.6	21.9	20.6	20.2	19.6
- Printers	71.5	68.0	65.2	64.4	63.8	61.9
Computers and Peripherals	1,597.0	1,583.7	1,597.6	1,555.2	1,526.0	1,515.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-3.9	-2.6	-12.4
- Desktops	-8.2	-5.9	-26.2
- Portable Computers	-3.5	-2.3	-11.0
-- Laptops	-2.1	-1.7	-8.0
-- Tablets	-5.0	-3.0	-14.0
Peripherals	-4.9	-4.7	-21.3
- Monitors	-4.5	-4.7	-21.5
- Printers	-5.0	-4.7	-21.3
Computers and Peripherals	-4.1	-3.0	-14.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.6	-0.9	-4.5
- Desktops	-5.9	-4.6	-21.0
- Portable Computers	-0.1	-0.5	-2.7
-- Laptops	0.3	0.5	2.5
-- Tablets	-0.8	-2.7	-12.7
Peripherals	-3.1	-3.1	-14.7
- Monitors	-3.2	-4.0	-18.6
- Printers	-3.0	-2.8	-13.4
Computers and Peripherals	-0.7	-1.0	-5.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	918.8	890.5	862.0	842.4	851.8	880.1
- Desktops	393.8	362.3	320.7	268.7	255.3	261.7
- Portable Computers	524.9	528.2	541.3	573.7	596.4	618.4
-- Laptops	307.6	306.5	311.4	336.0	353.7	369.2
-- Tablets	217.4	221.6	229.9	237.7	242.7	249.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Computers	387.7	370.7	361.5	355.8	370.6	384.0
- Desktops	205.4	187.5	170.1	146.3	143.2	141.6
- Portable Computers	182.3	183.2	191.5	209.5	227.5	242.3
-- Laptops	149.8	150.2	156.9	172.7	188.7	201.3
-- Tablets	32.6	33.0	34.6	36.8	38.7	41.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	3.3	-0.9	-4.2
- Desktops	2.5	-7.8	-33.5
- Portable Computers	3.7	3.3	17.8
-- Laptops	4.4	3.7	20.0
-- Tablets	2.7	2.8	14.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	3.6	-0.2	-1.0
- Desktops	-1.1	-7.2	-31.1
- Portable Computers	6.5	5.9	32.9
-- Laptops	6.7	6.1	34.4
-- Tablets	5.9	4.7	25.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	23.9	28.6	33.0
Fixed	76.1	71.4	67.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	5.9	7.5	8.3	7.2	6.0	5.6
iOS	50.4	46.6	47.4	50.1	51.1	51.5
Android	43.7	45.9	44.3	42.7	42.9	42.9
BlackBerry OS	-	-	-	-	-	-
Other	-	0.0	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Apple Computer Benelux BV	22.2	22.5	24.6	24.9	24.7
Hewlett-Packard Nederland BV	17.7	18.7	18.8	19.5	19.7
Samsung Electronics Nederland BV	10.1	9.5	9.5	9.4	9.2
Lenovo (International) BV	4.5	6.3	7.8	8.1	8.4
AsusTek Computer Inc	5.0	5.4	6.0	5.9	5.9
Acer Computer BV	7.1	6.7	5.9	5.6	5.3
Dell BV	5.5	5.8	5.8	5.6	5.3
Canon Nederland NV	4.4	4.2	4.1	4.3	3.8
Epson Europe BV	2.2	2.2	2.2	2.3	2.5
Huawei Netherlands	1.6	1.9	2.0	2.0	1.9
Amazon.com Inc	1.1	1.2	1.1	1.3	1.4
Brother International (Nederland) BV	1.3	1.2	1.2	1.1	1.1
Microsoft Nederland BV	0.8	1.2	1.3	1.2	1.0
Koninklijke Philips Electronics NV	0.4	0.4	0.4	0.4	0.4
Lexmark International Inc	0.3	0.3	0.3	0.3	0.2
Archos SA	0.7	0.6	0.4	0.2	0.1
Toshiba Benelux BV	1.2	0.3	0.1	0.1	0.0
Packard Bell BV	1.2	-	-	-	-
Barnes & Noble Inc	0.0	-	-	-	-
Sony Nederland BV	-	-	-	-	-
Research in Motion Ltd	-	-	-	-	-

Compaq Nederland BV	-	-	-	-	-
Private Label	0.4	0.4	0.4	0.4	0.3
Others	12.3	11.1	8.2	7.8	8.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard Nederland BV	18.6	18.7	19.5	19.7
iPad (Apple Inc)	Apple Computer Benelux BV	16.9	18.1	18.4	18.3
Samsung (Samsung Corp)	Samsung Electronics Nederland BV	9.5	9.5	9.4	9.2
Lenovo (Lenovo Group Ltd)	Lenovo (International) BV	6.3	7.8	8.1	8.4
Asus	AsusTek Computer Inc	5.4	6.0	5.9	5.9
MacBook (Apple Inc)	Apple Computer Benelux BV	5.0	5.8	5.9	5.8
Acer (Acer Inc)	Acer Computer BV	6.7	5.9	5.6	5.3
Dell (Dell Technologies Inc)	Dell BV	5.8	5.8	5.6	5.3
Canon (Canon Inc)	Canon Nederland NV	4.2	4.1	4.3	3.8
Epson (Seiko Epson Corp)	Epson Europe BV	2.2	2.2	2.3	2.5
Huawei (Huawei Technologies Co Ltd)	Huawei Netherlands	1.9	2.0	2.0	1.9
Fire	Amazon.com Inc	1.2	1.1	1.3	1.4
Brother (Brother Industries Ltd)	Brother International (Nederland) BV	1.2	1.2	1.1	1.1
Microsoft Surface (Microsoft Corp)	Microsoft Nederland BV	1.2	1.3	1.2	1.0
Mac (Apple Inc)	Apple Computer Benelux BV	0.7	0.7	0.6	0.6
Philips (Koninklijke Philips NV)	Koninklijke Philips Electronics NV	0.4	0.4	0.4	0.4
Lexmark (Apex Technology Co Ltd)	Lexmark International Inc	0.3	0.3	0.3	0.2
Archos	Archos SA	0.6	0.4	0.2	0.1
Toshiba (Toshiba Corp)	Toshiba Benelux BV	0.3	0.1	0.1	0.0
Nook	Barnes & Noble Inc	-	-	-	-
Compaq (Hewlett- Packard Development Co LP)	Compaq Nederland BV	-	-	-	-
Dell (Dell Inc)	Dell BV	-	-	-	-
HP (Hewlett-Packard Development Co LP)	Hewlett-Packard Nederland BV	-	-	-	-
Philips	Koninklijke Philips Electronics NV	-	-	-	-
Lexmark	Lexmark International Inc	-	-	-	-
Packard Bell (Acer Inc)	Packard Bell BV	-	-	-	-
Blackberry	Research in Motion Ltd	-	-	-	-
Sony Vaio (Sony Corp)	Sony Nederland BV	-	-	-	-
Vaio (Vaio Corp)	Sony Nederland BV	-	-	-	-
Private label	Private Label	0.4	0.4	0.4	0.3

Others	Others	11.2	8.3	7.8	8.6
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	73.3	72.0	71.1	69.5	67.2	58.5
- Grocery Retailers	2.1	2.0	1.9	1.8	1.6	1.5
-- Discounters	2.1	2.0	1.9	1.8	1.6	1.5
-- Hypermarkets	-	-	-	-	-	-
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	69.6	68.6	68.1	66.6	64.6	56.0
-- Electronics and Appliance Specialist Retailers	69.4	68.5	67.9	66.5	64.4	55.6
-- Other Non-Grocery Specialists	0.2	0.2	0.2	0.2	0.2	0.4
- Mixed Retailers	1.6	1.4	1.2	1.1	1.0	1.0
Non-Store Retailing	26.7	28.0	28.9	30.5	32.8	41.5
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	26.7	28.0	28.9	30.5	32.8	41.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	2,979.4	2,860.5	2,752.2	2,651.0	2,536.8	2,421.6
- Desktops	239.1	218.6	198.7	179.7	164.7	148.3
- Portable Computers	2,740.3	2,641.9	2,553.4	2,471.3	2,372.1	2,273.3
-- Laptops	1,440.2	1,413.8	1,374.4	1,345.4	1,302.4	1,256.9
-- Tablets	1,300.1	1,228.1	1,179.0	1,125.9	1,069.6	1,016.5
Peripherals	671.7	644.4	615.0	584.2	552.2	520.0
- Monitors	193.7	187.9	181.3	174.4	166.9	159.4
- Printers	478.0	456.5	433.7	409.8	385.2	360.6
Computers and Peripherals	3,651.1	3,504.9	3,367.2	3,235.3	3,089.0	2,941.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	1,433.6	1,392.4	1,340.4	1,315.7	1,286.8	1,256.4

- Desktops	118.5	108.7	99.1	89.9	82.8	73.0
- Portable Computers	1,315.1	1,283.7	1,241.3	1,225.8	1,204.0	1,183.5
-- Laptops	912.7	898.4	875.5	859.2	834.6	810.4
-- Tablets	402.4	385.3	365.9	366.6	369.4	373.1
Peripherals	81.5	77.1	72.9	68.7	64.5	60.6
- Monitors	19.6	18.4	17.3	16.2	15.2	14.2
- Printers	61.9	58.7	55.6	52.5	49.4	46.4
Computers and Peripherals	1,515.1	1,469.5	1,413.3	1,384.4	1,351.3	1,317.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-4.0	-4.1	-18.7
- Desktops	-8.6	-9.1	-38.0
- Portable Computers	-3.6	-3.7	-17.0
-- Laptops	-1.8	-2.7	-12.7
-- Tablets	-5.5	-4.8	-21.8
Peripherals	-4.1	-5.0	-22.6
- Monitors	-3.0	-3.8	-17.7
- Printers	-4.5	-5.5	-24.6
Computers and Peripherals	-4.0	-4.2	-19.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-2.9	-2.6	-12.4
- Desktops	-8.3	-9.2	-38.4
- Portable Computers	-2.4	-2.1	-10.0
-- Laptops	-1.6	-2.4	-11.2
-- Tablets	-4.2	-1.5	-7.3
Peripherals	-5.4	-5.8	-25.7
- Monitors	-6.0	-6.3	-27.6
- Printers	-5.2	-5.6	-25.0
Computers and Peripherals	-3.0	-2.8	-13.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	880.1	910.5	922.5	930.9	931.8	931.1
- Desktops	261.7	266.9	261.6	253.8	242.3	230.2
- Portable Computers	618.4	643.5	660.9	677.1	689.4	700.9

-- Laptops	369.2	386.9	398.5	406.1	410.2	413.3
-- Tablets	249.3	256.6	262.4	271.0	279.2	287.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Computers	384.0	405.5	419.7	426.0	431.1	433.7
- Desktops	141.6	150.0	153.0	150.7	147.7	144.0
- Portable Computers	242.3	255.5	266.7	275.3	283.4	289.7
-- Laptops	201.3	213.3	223.6	230.8	237.4	242.1
-- Tablets	41.0	42.2	43.1	44.5	46.0	47.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	3.4	1.1	5.8
- Desktops	2.0	-2.5	-12.0
- Portable Computers	4.1	2.5	13.3
-- Laptops	4.8	2.3	12.0
-- Tablets	3.0	2.9	15.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	5.6	2.5	13.0
- Desktops	5.9	0.3	1.7
- Portable Computers	5.4	3.6	19.5
-- Laptops	5.9	3.8	20.3
-- Tablets	2.9	3.0	16.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	33.0	35.5	36.2	37.5	38.7	39.0
Fixed	67.0	64.5	63.8	62.5	61.3	61.0

Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	5.6	5.1
iOS	51.5	52.5
Android	42.9	42.4
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Japan

Euromonitor International

September 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Demand from home schooling and working from home not expected to be enough to prevent A decline in 2020	1
Monitors benefiting from flexible working arrangements.....	1
Sales of tablets struggle as prices rise	2
RECOVERY AND OPPORTUNITIES	2
Financial challenges and A declining population threaten sales of computers and peripherals	2
Japan accelerates plans to provide every child with A computer.....	2
Local brands losing their appeal due to acquisition activity	3
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	3
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	4
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	4
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015- 2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	5
Table 10 Sales of Tablets by Operating System 2015-2020	5
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017- 2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	7
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	8
Table 18 Forecast Sales of Computers by Category: Business Volume 2020- 2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	9
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	10

Table 23 Forecast Sales of Tablets by Operating System 2020-2021 10

COMPUTERS AND PERIPHERALS IN JAPAN

KEY DATA FINDINGS

- COVID-19 negatively impacts sales, but demand from home schooling helps soften the blow
- Computers and peripherals is set to decline by 3% in retail volume terms to reach 15.4 million units in 2020
- Monitors is expected to be the most dynamic category in 2020 with retail volume growth of 8%
- Apple Japan Inc leads with a retail volume share of 14% in 2020
- Over the forecast period, computers and peripherals is projected to decline at a 3% retail volume CAGR to reach 12.9 million units in 2025

2020 IMPACT

Demand from home schooling and working from home not expected to be enough to prevent A decline in 2020

To manage the spread of COVID-19 Japan declared a state of emergency with schools closed and employers encouraged to let their staff work from home where possible. With students forced into home schooling this created an increased demand for computers among this demographic. Unable to learn in the classroom, schools provided online learning material and created online classrooms. Furthermore, private sector companies have also offered free online lessons to children and parents through a government digital platform. Due to the written constitution in Japan, the government has been unable to force businesses to implement work-from-home rules, although many have made arrangements for this to help curb the spread of COVID-19. Nevertheless, many employees remain reluctant to work from home, with face-to-face contact being culturally important in Japan when conducting business. As such, working from home has not had such a significant impact on sales of computers as in other markets.

Although working from home and home schooling has helped to stimulate some additional sales, this is only expected to soften the blow with COVID-19 still expected to put a sizeable dent in overall volume sales in 2020. There is still a strong reliance on electronics and appliance specialist retailers for sales and with store openings disrupted by the lockdown this is likely to result in computers and peripherals declining in retail volume terms in 2020.

Monitors benefiting from flexible working arrangements

Monitors is the one category within computers and peripherals which is expected to record growth in volume terms in 2020. New working practices are boosting demand for monitors, with additional or larger screens being used to support the growing number of people working from home. Even before the outbreak of COVID-19 there was already a growing trend towards working more from home, with consumers looking to develop a better work life balance. The change in working styles is also leading to a shift from desktops to laptops, as working locations become more flexible. As a result, workers are increasingly getting used to working with laptops along with independent monitors. Demand for monitors is also being boosted by the increasing popularity of video streaming services, such as YouTube, Netflix, and Amazon's Prime Video, as well as Japan's burgeoning gaming industry. With consumers being forced to spend more

time at home as a result of COVID-19 this has further increased the demand for entertainment such as video streaming and gaming.

Sales of tablets struggle as prices rise

In 2019, the Japanese Government revised the Telecommunications Business Law to ban carriers from offering plans that cover the cost of both the device, including mobile phones and tablets, and data usage. Prior to the revision, carriers placed high fees on data usage while subsidising the cost of the device. This was seen as unnecessarily complicated and led to data usage fees that were much higher than in other developed markets. The revision to the law is aimed at making pricing more transparent and making it easier for consumers to compare prices, boosting competition. However, with this serving to drive up prices this has had a negative impact on sales in 2020, although somewhat softened by demand for home schooling. Business volume sales of tablets grew strongly in 2019, bolstered by the fact that extended support for Windows 7 was scheduled to end in January 2020. As a result, there has also been a drop off in business demand in 2020 with businesses having already upgraded.

RECOVERY AND OPPORTUNITIES

Financial challenges and A declining population threaten sales of computers and peripherals

Computers and peripherals faces a challenging future in Japan. While business volume sales could benefit from an increasing focus on work from home arrangements, especially when it comes to portable computers, retail sales are not expected to fare quite so well. The measures taken to control COVID-19 are expected to have a severe impact on the local economy and this is likely to force consumers to make tough budgetary decisions. As such, consumers are likely to delay purchasing new or replacement devices until necessary. Added to this, Japan faces a demographic crisis with a rapidly ageing society and a falling birth rate. With the total population projected to decline by almost 2%, and with the working age and school age populations also expected to decline, this is likely to have a negative impact on demand.

Japan accelerates plans to provide every child with A computer

The Japanese government has been pushing forward what it calls its "GIGA School Vision". The initial plan was to distribute one computer device per student to all public schools in Japan by March 2024. However, in light of COVID-19, the government has accelerated the rollout of the scheme, with it looking to achieve its target by March 2021. The impact of COVID-19 served to highlight that many schools, teachers, and students were not ready for the digitalisation of classes, with many students not having access to a computer device. With the speeding up of its plans this could have a negative impact on retail sales of computers, with parents potentially no longer needing to buy a computer for their child.

Looking to tap into the potential of the government's "GIGA School Vision" plans Microsoft launched "Microsoft GIGA School Package" and Google launched "Google GIGA School Package". Both players have platforms, applications and devices for both teachers and students. One of the key points will be the acceptance of Chromebooks. Chromebooks are generally cheaper than Windows PCs as Chrome OS has lower hardware requirements. Many schools have already adopted services from Google including Google Classroom, which was used during the home seclusion period caused by COVID-19.

Local brands losing their appeal due to acquisition activity

Japanese consumers have shown strong loyalty to domestic brands in the past, believing them to be superior to foreign brands. However, the competitive landscape is shifting with some of these popular local brands such as NEC, Fujitsu and Dynabook having been acquired by large foreign tech companies. As the definition of what constitutes a local brand becomes blurred, consumers are increasingly putting their faith in foreign brands, especially US brands, with Apple and Microsoft in a strong position heading into the forecast period. Nevertheless, local brands are showing a strong presence in the growing area of gaming PCs. For example, Japanese company, Mouse Computer Co Ltd, offers gaming PC brand, G-Tune, while Thirdwave Corp includes the gaming PC brand Galleria in its portfolio. Both these brands have adopted a competitive pricing strategy, retailing at notably lower prices than rival brands. There is also a growing interest in high performance gaming laptops which could also influence the competitive landscape over the forecast period and help to drive value growth in laptops.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	10,072.6	9,801.8	9,884.3	8,715.2	9,352.5	8,921.4
- Desktops	729.9	618.2	546.5	440.3	516.0	490.2
- Portable Computers	9,342.7	9,183.6	9,337.7	8,275.0	8,836.5	8,431.2
-- Laptops	4,545.6	4,791.5	4,796.3	4,433.3	5,186.9	4,927.6
-- Tablets	4,797.1	4,392.1	4,541.5	3,841.7	3,649.6	3,503.6
Peripherals	6,891.0	6,815.5	6,757.2	6,676.7	6,500.4	6,464.6
- Monitors	924.7	1,171.4	1,429.2	1,693.3	1,828.8	1,972.7
- Printers	5,966.3	5,644.1	5,328.0	4,983.4	4,671.6	4,491.8
Computers and Peripherals	16,963.6	16,617.3	16,641.5	15,391.9	15,852.9	15,386.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

JPY billion	2015	2016	2017	2018	2019	2020
Computers	750.5	783.6	821.0	752.6	833.7	809.3
- Desktops	69.7	61.7	57.4	48.0	56.1	53.9
- Portable Computers	680.7	721.9	763.6	704.6	777.6	755.3
-- Laptops	435.9	484.8	506.6	479.6	558.4	541.1
-- Tablets	244.8	237.1	257.0	225.0	219.3	214.3
Peripherals	137.5	138.2	139.0	138.9	136.7	136.7
- Monitors	18.0	23.5	29.3	35.5	39.0	42.7
- Printers	119.5	114.8	109.6	103.4	97.6	94.0
Computers and Peripherals	888.0	921.8	959.9	891.6	970.4	946.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-4.6	-2.4	-11.4
- Desktops	-5.0	-7.7	-32.8
- Portable Computers	-4.6	-2.0	-9.8
-- Laptops	-5.0	1.6	8.4
-- Tablets	-4.0	-6.1	-27.0
Peripherals	-0.6	-1.3	-6.2
- Monitors	7.9	16.4	113.3
- Printers	-3.8	-5.5	-24.7
Computers and Peripherals	-2.9	-1.9	-9.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-2.9	1.5	7.8
- Desktops	-3.9	-5.0	-22.7
- Portable Computers	-2.9	2.1	11.0
-- Laptops	-3.1	4.4	24.1
-- Tablets	-2.3	-2.6	-12.5
Peripherals	0.0	-0.1	-0.6
- Monitors	9.5	18.8	136.9
- Printers	-3.7	-4.7	-21.4
Computers and Peripherals	-2.5	1.3	6.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	7,849.0	7,521.5	7,482.0	8,753.1	11,968.6	7,287.7
- Desktops	3,600.9	3,186.8	2,868.1	3,011.5	3,914.9	1,761.7
- Portable Computers	4,248.2	4,334.7	4,613.9	5,741.6	8,053.7	5,526.0
-- Laptops	2,474.8	2,391.1	2,507.0	3,242.0	5,349.3	3,423.6
-- Tablets	1,773.4	1,943.6	2,106.9	2,499.6	2,704.4	2,102.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

JPY billion	2015	2016	2017	2018	2019	2020
Computers	496.2	476.2	475.7	563.5	800.8	478.6
- Desktops	261.0	233.7	214.2	228.8	299.4	136.7
- Portable Computers	235.3	242.5	261.6	334.7	501.3	341.9
-- Laptops	171.9	169.9	180.7	236.4	392.5	255.0
-- Tablets	63.3	72.6	80.9	98.3	108.9	86.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-39.1	-1.5	-7.2
- Desktops	-55.0	-13.3	-51.1
- Portable Computers	-31.4	5.4	30.1
-- Laptops	-36.0	6.7	38.3
-- Tablets	-22.3	3.5	18.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	-40.2	-0.7	-3.5
- Desktops	-54.3	-12.1	-47.6
- Portable Computers	-31.8	7.8	45.3
-- Laptops	-35.0	8.2	48.3
-- Tablets	-20.2	6.5	37.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	20.5	23.0	25.0
Fixed	79.5	77.0	75.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	24.4	29.3	29.0	28.7	16.5	15.0
iOS	44.0	42.8	39.3	38.4	48.5	48.0
Android	31.6	27.9	31.7	32.9	35.0	37.0
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Apple Japan Inc	16.3	14.7	12.8	14.4	14.1
Canon Inc	14.6	14.2	14.0	12.9	12.8
Seiko Epson Corp	14.0	13.7	14.4	12.7	12.6
NEC Lenovo Japan Group	11.7	11.0	10.5	11.8	11.8
Fujitsu Ltd	5.5	6.1	6.1	6.3	6.1
Huawei Technologies Japan KK	1.1	4.9	4.8	4.0	4.2
Dynabook Inc	-	-	3.7	4.0	3.8
I-O Data Device Inc	1.9	2.5	3.3	3.3	3.5
Hewlett-Packard Japan Ltd	3.7	2.7	2.7	3.4	3.4
Brother Industries Ltd	2.8	2.8	3.0	3.1	3.2
Asus Japan Inc	4.0	3.5	3.4	3.2	3.2
Dell KK	2.4	2.2	2.1	2.6	2.7
Acer Japan Corp	2.5	2.2	2.2	2.1	2.1
LG Electronics Japan Inc	0.6	2.6	2.6	2.0	1.7
BenQ Japan Co Ltd	1.3	1.2	1.5	1.5	1.6
Microsoft Japan Co Ltd	2.6	2.4	2.0	1.5	1.6
Vaio Corp	0.9	1.0	1.0	1.0	0.9
Panasonic Corp	0.7	0.7	0.8	0.8	0.7
Samsung Japan Corp	0.4	0.3	0.3	0.3	0.3
Toshiba Corp	1.4	2.7	-	-	-
Buffalo Co Ltd	0.3	0.3	-	-	-
Sony Corp	1.0	0.3	-	-	-
Ricoh Co Ltd	0.2	0.2	-	-	-
Logitech International SA	0.2	0.1	-	-	-
Google Japan Inc	2.0	0.1	-	-	-
Casio Computer Co Ltd	0.2	0.1	-	-	-
Mitsubishi Electric Corp	-	-	-	-	-
Kojinsha Co Ltd	-	-	-	-	-
Others	7.6	7.6	9.0	9.1	9.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Canon	Canon Inc	14.2	14.0	12.9	12.8
Epson	Seiko Epson Corp	13.7	14.4	12.7	12.6
iPad (Apple Inc)	Apple Japan Inc	10.7	9.6	11.2	10.9
NEC (Lenovo Group Ltd)	NEC Lenovo Japan Group	6.7	6.5	7.7	7.6
Fujitsu (Lenovo Group Ltd)	Fujitsu Ltd	6.1	6.1	6.3	6.1
Huawei (Huawei Technologies Co Ltd)	Huawei Technologies Japan KK	4.9	4.8	4.0	4.2
Lenovo (Lenovo Group Ltd)	NEC Lenovo Japan Group	4.3	4.0	4.1	4.2
Dynabook	Dynabook Inc	-	3.7	4.0	3.8

I-O Data	I-O Data Device Inc	2.5	3.3	3.3	3.5
HP (HP Inc)	Hewlett-Packard Japan Ltd	2.7	2.7	3.4	3.4
Brother	Brother Industries Ltd	2.8	3.0	3.1	3.2
Asus (AsusTek Computer Inc)	Asus Japan Inc	3.5	3.4	3.2	3.2
MacBook (Apple Inc)	Apple Japan Inc	3.5	2.9	2.9	2.9
Dell (Dell Technologies Inc)	Dell KK	2.2	2.1	2.6	2.7
Acer (Acer Inc)	Acer Japan Corp	2.2	2.2	2.1	2.1
LG (LG Corp)	LG Electronics Japan Inc	2.6	2.6	2.0	1.7
BenQ (BenQ Corp)	BenQ Japan Co Ltd	1.2	1.5	1.5	1.6
Microsoft Surface (Microsoft Corp)	Microsoft Japan Co Ltd	2.4	2.0	1.5	1.6
Vaio	Vaio Corp	1.0	1.0	1.0	0.9
Panasonic	Panasonic Corp	0.7	0.8	0.8	0.7
Mac (Apple Inc)	Apple Japan Inc	0.4	0.3	0.3	0.3
Samsung (Samsung Corp)	Samsung Japan Corp	0.3	0.3	0.3	0.3
Toshiba	Toshiba Corp	2.7	-	-	-
Buffalo	Buffalo Co Ltd	0.3	-	-	-
Sony	Sony Corp	0.3	-	-	-
Ricoh	Ricoh Co Ltd	0.2	-	-	-
Logitech	Logitech International SA	0.1	-	-	-
Nexus (Alphabet Inc)	Google Japan Inc	0.1	-	-	-
Casio	Casio Computer Co Ltd	0.1	-	-	-
Dell (Dell Inc)	Dell KK	-	-	-	-
Others	Others	7.6	9.0	9.1	9.7
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	86.2	86.4	86.3	85.1	82.3	78.4
- Grocery Retailers	-	-	-	-	-	-
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	-	-	-	-	-	-
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	77.9	78.4	78.5	77.2	75.0	71.4
-- Electronics and Appliance Specialist Retailers	77.8	76.4	74.7	77.2	75.0	71.4
-- Other Non-Grocery Specialists	0.1	2.0	3.8	0.0	-	-
- Mixed Retailers	8.3	8.0	7.7	7.9	7.3	7.0
Non-Store Retailing	13.8	13.6	13.7	14.9	17.7	21.6
- Direct Selling	-	-	-	-	-	-
- Homeshopping	2.0	1.9	1.8	1.8	1.6	1.6
- E-Commerce	11.8	11.8	12.0	13.2	16.1	20.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	8,921.4	8,366.3	8,309.7	8,162.9	7,936.8	7,658.6
- Desktops	490.2	451.0	428.4	409.1	392.8	379.0
- Portable Computers	8,431.2	7,915.3	7,881.2	7,753.8	7,544.0	7,279.6
-- Laptops	4,927.6	4,434.8	4,488.0	4,510.5	4,506.0	4,492.5
-- Tablets	3,503.6	3,480.5	3,393.2	3,243.3	3,038.0	2,787.1
Peripherals	6,464.6	6,183.5	5,926.4	5,686.4	5,467.3	5,269.6
- Monitors	1,972.7	2,006.1	2,028.9	2,038.3	2,041.7	2,042.7
- Printers	4,491.8	4,177.4	3,897.5	3,648.1	3,425.5	3,226.9
Computers and Peripherals	15,386.0	14,549.7	14,236.0	13,849.3	13,404.0	12,928.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

JPY billion	2020	2021	2022	2023	2024	2025
Computers	809.3	757.5	759.3	753.3	740.2	722.8
- Desktops	53.9	50.1	48.0	46.1	44.5	43.1
- Portable Computers	755.3	707.4	711.3	707.2	695.7	679.7
-- Laptops	541.1	491.8	499.2	503.0	503.5	502.7
-- Tablets	214.3	215.5	212.1	204.2	192.3	177.0
Peripherals	136.7	131.5	126.6	121.9	117.5	113.5
- Monitors	42.7	43.9	44.7	45.1	45.3	45.4
- Printers	94.0	87.6	82.0	76.8	72.2	68.1
Computers and Peripherals	946.0	889.0	885.9	875.2	857.7	836.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-6.2	-3.0	-14.2
- Desktops	-8.0	-5.0	-22.7
- Portable Computers	-6.1	-2.9	-13.7
-- Laptops	-10.0	-1.8	-8.8
-- Tablets	-0.7	-4.5	-20.4
Peripherals	-4.3	-4.0	-18.5
- Monitors	1.7	0.7	3.5
- Printers	-7.0	-6.4	-28.2
Computers and Peripherals	-5.4	-3.4	-16.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-6.4	-2.2	-10.7
- Desktops	-7.1	-4.4	-20.1
- Portable Computers	-6.3	-2.1	-10.0
-- Laptops	-9.1	-1.5	-7.1
-- Tablets	0.6	-3.7	-17.4
Peripherals	-3.8	-3.7	-17.0
- Monitors	2.7	1.2	6.3
- Printers	-6.8	-6.3	-27.6
Computers and Peripherals	-6.0	-2.4	-11.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units

	2020	2021	2022	2023	2024	2025
Computers	7,287.7	7,028.7	6,829.1	6,828.9	6,978.1	6,929.0
- Desktops	1,761.7	1,613.2	1,483.7	1,366.1	1,258.1	1,159.7
- Portable Computers	5,526.0	5,415.4	5,345.4	5,462.8	5,720.1	5,769.3
-- Laptops	3,423.6	3,467.5	3,477.9	3,651.8	3,943.9	4,022.8
-- Tablets	2,102.4	1,947.9	1,867.5	1,811.0	1,776.1	1,746.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

JPY billion

	2020	2021	2022	2023	2024	2025
Computers	478.6	468.1	458.9	463.3	477.9	477.3
- Desktops	136.7	126.7	117.9	109.7	102.1	95.1
- Portable Computers	341.9	341.4	341.0	353.5	375.8	382.3
-- Laptops	255.0	259.1	260.6	274.2	296.7	303.2
-- Tablets	86.9	82.3	80.4	79.3	79.1	79.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-3.6	-1.0	-4.9
- Desktops	-8.4	-8.0	-34.2
- Portable Computers	-2.0	0.9	4.4
-- Laptops	1.3	3.3	17.5
-- Tablets	-7.3	-3.6	-16.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-2.2	-0.1	-0.3
- Desktops	-7.3	-7.0	-30.5
- Portable Computers	-0.1	2.3	11.8
-- Laptops	1.6	3.5	18.9
-- Tablets	-5.3	-1.9	-9.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	25.0	26.5	28.0	29.0	30.0	31.0
Fixed	75.0	73.5	72.0	71.0	70.0	69.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	15.0	14.0
iOS	48.0	46.0
Android	37.0	40.0
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in South Korea

Euromonitor International

October 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Working and studying from home due to COVID-19 provides impetus for category sales.....	1
Convertible laptops with an increasing presence in the category	1
Samsung and LG continue to lead, but multinationals losing share to small domestic firms	2
RECOVERY AND OPPORTUNITIES	2
Continued positive growth rates expected as working from home remains more common, even after COVID-19	2
Gaming products likely to remain A positive factor for the overall category	2
COVID-19 pandemic results in strong growth for the e-commerce channel	3
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	4
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	5
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	7
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	8
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	9
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	9
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	10

Table 23 Forecast Sales of Tablets by Operating System 2020-2021 10

COMPUTERS AND PERIPHERALS IN SOUTH KOREA

KEY DATA FINDINGS

- Studying and working at home due to COVID-19 helps drive sales of laptops in 2020
- Retail volume sales of computers and peripherals increase by 1% to reach 5.4 million units in 2020
- Laptops records the most dynamic retail volume growth of 3% in 2020
- Samsung Electronics leads computers and peripherals with a 29% volume share in 2020
- Computers and peripherals to record a stagnating retail volume CAGR over the forecast period with sales remaining at 5.4 million units in 2025

2020 IMPACT

Working and studying from home due to COVID-19 provides impetus for category sales

After two years in which retail sales of computers and peripherals were in decline in both volume and value terms, 2020 is expected to register positive volume and value growth, heavily influenced by the COVID-19 pandemic. With many students and office workers in isolation in their homes, they have therefore been using an online education system or working at home, as recommended by the government. This has therefore been driving growth of computers and peripherals as the educational and working culture was being reshaped. In terms of working from home, laptops are popular in the home office and schooling environment, seeing sales of these products outstrip growth in the other computers and peripherals categories in 2020 due to the widespread remote working and schooling in South Korea. Prior to the COVID-19 pandemic, only a few multinational companies were allowing their employees to work from home, as they had doubts about home office productivity. Another product doing well in 2020 has been monitors, as home workers purchase additional models to help improve their working efficiency at home.

Convertible laptops with an increasing presence in the category

Convertible laptops continue to be introduced by the leading companies. As consumers, especially business workers, want their laptop to operate in different circumstances, they are looking for the ability to fold the screen as well as having advanced screen quality, such as full HD and 4K. The 360-degree touchscreen display is seen as being especially useful with a stylus pen for writing ideas down. Manufacturers are increasingly developing the product design to be more sophisticated, even customised based on feedback from consumers. However, the fixed laptop is still the major type because of the relatively cheaper prices than for convertible laptops, although, if players can lower the prices of convertible laptops to a great enough degree, then these products could become mainstream over the forecast period.

Samsung and LG continue to lead, but multinationals losing share to small domestic firms

Samsung Electronics continues to be the leading player in the computers and peripherals in 2020, followed by LG Electronics. In desktops, they continue to increase their business and government sales as well as their retail sales to consumers. Samsung introduced the Galaxy Tab S6 lite version in April 2020, which supports an S-pen for writing and drawing on the screen. In addition, it is gradually developing gaming laptops and monitors into being premium devices. LG Electronics continues to hold the leading position in laptops, backed by LG's flagship laptop Gram, which continues to be popular among consumers due to its 17-inch screen and weight of less than 1kg, and monitors. The company has also been focusing on gaming monitors under its UltraGear brand. Both of these major players continue to invest in e-sports gaming for marketing promotions, with gaming devices continuing to help drive their profits in 2020.

Multinational companies continue to lose sales share to the small domestic firms that are consistently introducing relatively cheaper devices. Although these companies like to run aggressive marketing promotions, this was switched mostly into the online sphere in early 2020 as offline marketing was hard to conduct against a backdrop of the COVID-19 pandemic. Even start-up firms are offering products at under KRW300,000 and with a 1-year warranty, attracting consumers who are becoming increasingly price sensitive as they worry about their future disposable income due to the COVID-19 pandemic.

RECOVERY AND OPPORTUNITIES

Continued positive growth rates expected as working from home remains more common, even after COVID-19

The large-scale working and studying from home as measures to help slow the spread of the COVID-19 virus were expected to drive sales of computers and peripherals in 2020, in both volume and value terms. With many students and office workers in isolation in their homes, they were therefore using online education systems or working at home. Many either bought new computer and peripheral products for this, or replaced their existing models. As South Korea emerges from the COVID-19 pandemic, students will return to their schools and most workers will likely return to their offices, although employers will, in future, be less sceptical of home office productivity among their employees. This is likely to see a certain level of continued home working among office employees, even if only on a certain number of days a week, which should help continue to drive sales of computers and peripherals, even if this trend weakens as the forecast period progresses. Positive growth rates are therefore expected for the coming years, albeit gradually declining year on year to reach stagnation in 2025, although this will still be an improvement on the annual performances being recorded immediately prior to 2020.

Gaming products likely to remain A positive factor for the overall category

Prior to 2020 and the arrival of the COVID-19 pandemic, unit sales of computers were in decline in what is an increasingly mature product area. Players had therefore been turning to premium desktops and laptops, like gaming computers, because the prices are higher than for ordinary computers. Gamers often belong to some kind of community, sharing information about computer performances in terms of speed, running and design within their communities as the most recent computer games generally require high-performance computers. Gaming computer users will often also purchase a gaming monitor, a gaming chair, speakers and even a mouse,

so that they show relative price inelasticity. With South Korea being one of the biggest online gaming countries worldwide, these core consumers will persistently drive the sales of gaming machines and manufacturers will increasingly focus on them.

COVID-19 pandemic results in strong growth for the e-commerce channel

The widespread caution among the local population with regard to potentially contracting the COVID-19 virus has put many consumers off visiting bricks-and-mortar stores, forcing retailers and manufacturers to prioritise their online sales operations. This was especially the case in March, which is the major season for computer sales as parents often purchase new models for their children before they return to school. With this coinciding with the arrival of the virus, the major discounts and additional free gifts being offered in the e-commerce channel as well as its swift delivery options were proving attractive to consumers, who were switching their purchases of devices from offline stores to online retailers. This will lead to a major increase in the e-commerce share of overall retail volume sales in 2020, with this trend expected to continue over the rest of the forecast period, albeit perhaps not at such dynamic rates as in 2020.

It should be noted, however, that electronics and appliance specialist retailers is the main distribution channel, as consumers still like to see and even touch products before they buy them. Checking the size, screen brightness, colour and weight are reasons to visit offline shops before purchasing an item. Such stores usually run aggressive promotions like providing gift packs with high price discounts during the graduation season, mostly between January and February, so that manufacturers see quite a large portion of sales taking place in this period. These retailers also tend to have online shops with the same prices as their offline outlets, meaning that consumers can purchase a product at the same price in both retail channels.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	3,774.6	3,911.9	3,931.2	3,800.7	3,683.8	3,719.0
- Desktops	642.9	605.0	576.0	517.8	457.9	431.4
- Portable Computers	3,131.7	3,306.9	3,355.1	3,283.0	3,225.9	3,287.5
-- Laptops	1,669.5	1,765.8	1,744.6	1,721.6	1,695.8	1,739.0
-- Tablets	1,462.2	1,541.1	1,610.5	1,561.4	1,530.2	1,548.5
Peripherals	1,738.2	1,675.2	1,672.3	1,654.8	1,627.2	1,657.8
- Monitors	1,029.4	993.4	999.3	993.2	978.2	998.9
- Printers	708.8	681.9	673.0	661.6	649.0	658.9
Computers and Peripherals	5,512.8	5,587.2	5,603.5	5,455.5	5,311.0	5,376.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Computers	2,521.5	2,609.2	2,608.7	2,543.0	2,479.9	2,538.7
- Desktops	434.8	402.8	378.2	334.7	291.4	270.2

- Portable Computers	2,086.7	2,206.4	2,230.5	2,208.3	2,188.5	2,268.4
-- Laptops	1,485.4	1,582.3	1,571.2	1,562.0	1,547.7	1,607.2
-- Tablets	601.3	624.1	659.3	646.4	640.8	661.3
Peripherals	327.5	314.2	308.7	305.4	300.1	306.4
- Monitors	232.7	222.5	222.2	221.9	219.7	225.4
- Printers	94.9	91.7	86.5	83.5	80.5	81.0
Computers and Peripherals	2,849.0	2,923.4	2,917.3	2,848.4	2,780.0	2,845.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	1.0	-0.3	-1.5
- Desktops	-5.8	-7.7	-32.9
- Portable Computers	1.9	1.0	5.0
-- Laptops	2.5	0.8	4.2
-- Tablets	1.2	1.2	5.9
Peripherals	1.9	-0.9	-4.6
- Monitors	2.1	-0.6	-3.0
- Printers	1.5	-1.5	-7.0
Computers and Peripherals	1.2	-0.5	-2.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	2.4	0.1	0.7
- Desktops	-7.3	-9.1	-37.8
- Portable Computers	3.7	1.7	8.7
-- Laptops	3.8	1.6	8.2
-- Tablets	3.2	1.9	10.0
Peripherals	2.1	-1.3	-6.5
- Monitors	2.6	-0.6	-3.1
- Printers	0.6	-3.1	-14.6
Computers and Peripherals	2.3	0.0	-0.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	2,273.0	2,397.8	2,512.4	2,372.6	3,055.5	3,278.4
- Desktops	1,462.9	1,484.7	1,514.4	1,314.8	1,630.2	1,571.9
- Portable Computers	810.1	913.1	998.0	1,057.8	1,425.3	1,706.5
-- Laptops	391.4	442.0	477.0	481.7	557.7	663.2
-- Tablets	418.7	471.1	521.0	576.1	867.6	1,043.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Computers	1,202.1	1,254.0	1,318.6	1,252.3	1,598.2	1,730.3
- Desktops	743.0	741.5	756.9	660.4	822.5	796.3
- Portable Computers	459.1	512.6	561.7	591.9	775.7	934.0
-- Laptops	290.7	318.8	342.7	347.3	403.7	482.1
-- Tablets	168.4	193.7	219.0	244.6	372.1	451.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	7.3	7.6	44.2
- Desktops	-3.6	1.4	7.4
- Portable Computers	19.7	16.1	110.7
-- Laptops	18.9	11.1	69.5
-- Tablets	20.2	20.0	149.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	8.3	7.6	43.9
- Desktops	-3.2	1.4	7.2
- Portable Computers	20.4	15.3	103.4
-- Laptops	19.4	10.7	65.9
-- Tablets	21.4	21.8	168.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	7.0	12.0	16.0
Fixed	93.0	88.0	84.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	22.9	24.5	20.2	19.0	18.5	18.0
iOS	25.6	25.7	23.3	23.1	23.0	22.6
Android	51.5	49.8	56.5	57.9	58.5	59.4
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Samsung Electronics Co Ltd	33.5	28.9	29.0	29.3	29.0
LG Electronics Inc	18.2	18.6	18.9	18.7	18.5
Hewlett-Packard Korea Ltd	7.4	10.9	10.6	10.2	10.0
Apple Inc	8.5	8.4	8.6	10.0	9.5
Mpgio co Ltd	3.6	3.5	3.4	3.4	3.4
Canon Korea Consumer Imaging Inc	2.3	2.1	2.3	2.0	2.0
TriGem Computer Inc	2.3	2.2	2.2	2.1	2.0
Epson Korea Co Ltd	1.3	1.5	1.9	2.0	2.0
Dell Inc	1.9	2.3	2.1	1.8	1.8
Lenovo Korea Co Ltd	0.5	1.0	0.9	1.0	1.3
Huawei Technologies Korea Ltd	0.6	1.1	1.1	1.1	1.0
MSI Technology Co Ltd	0.6	0.7	0.7	0.8	0.9
Brother Internatioanl Korea Inc	0.4	0.5	0.6	0.6	0.6
Asus Korea Co Ltd	0.3	0.3	0.4	0.4	0.5
Hansung Computer Co Ltd	0.3	0.4	0.4	0.4	0.4
Jooyontech Co Ltd	0.3	0.2	0.2	0.2	0.2
Fuji Xerox Korea Co Ltd	0.2	0.2	0.1	0.1	0.1
Acer Inc	-	-	-	-	-
Toshiba Electronics Korea Corp	-	-	-	-	-
Others	17.8	17.4	16.7	15.7	16.9
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Samsung (Samsung Corp)	Samsung Electronics Co Ltd	28.9	29.0	29.3	29.0

LG (LG Corp)	LG Electronics Inc	18.6	18.9	18.7	18.5
iPad	Apple Inc	6.7	6.6	6.6	6.5
Samsung (HP Inc)	Hewlett-Packard Korea Ltd	6.5	6.3	6.4	6.4
HP (HP Inc)	Hewlett-Packard Korea Ltd	4.3	4.3	3.9	3.6
mpgio	Mpgio co Ltd	3.5	3.4	3.4	3.4
Mac	Apple Inc	1.7	2.0	3.4	3.0
Canon (Canon Inc)	Canon Korea Consumer Imaging Inc	2.1	2.3	2.0	2.0
Epson (Seiko Epson Corp)	Epson Korea Co Ltd	1.5	1.9	2.0	2.0
Dell (Dell Technologies Inc)	Dell Inc	2.3	2.1	1.8	1.8
Lenovo (Lenovo Group Ltd)	Lenovo Korea Co Ltd	1.0	0.9	1.0	1.3
Sambo	TriGem Computer Inc	1.5	1.4	1.4	1.3
BeYpad (Huawei Technologies Co Ltd)	Huawei Technologies Korea Ltd	1.1	1.1	1.1	1.0
MSI (Micro-Star International Co Ltd)	MSI Technology Co Ltd	0.7	0.7	0.8	0.9
TriGem	TriGem Computer Inc	0.7	0.7	0.7	0.7
Brothers (Brother Industries Ltd)	Brother Internatioanl Korea Inc	0.5	0.6	0.6	0.6
Asus (AsusTek Computer Inc)	Asus Korea Co Ltd	0.3	0.4	0.4	0.5
Hansung	Hansung Computer Co Ltd	0.4	0.4	0.4	0.4
Jooyon	Jooyontech Co Ltd	0.2	0.2	0.2	0.2
FujiFilm (Fujifilm Holdings Corp)	Fuji Xerox Korea Co Ltd	0.2	0.1	0.1	0.1
Acer	Acer Inc	-	-	-	-
Dell	Dell Inc	-	-	-	-
HP (Hewlett-Packard Development Co LP)	Hewlett-Packard Korea Ltd	-	-	-	-
Toshiba (Toshiba Corp)	Toshiba Electronics Korea Corp	-	-	-	-
Others	Others	17.4	16.7	15.7	16.9
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	74.8	74.7	74.7	74.5	74.5	70.5
- Grocery Retailers	6.5	6.5	6.5	6.5	6.4	6.1
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	6.4	6.5	6.4	6.4	6.3	6.0
-- Supermarkets	0.1	0.1	0.1	0.1	0.1	0.1
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	63.8	63.9	63.9	63.8	63.9	60.5
-- Electronics and Appliance Specialist Retailers	63.5	63.6	63.7	63.8	63.9	60.5
-- Other Non-Grocery Specialists	0.3	0.3	0.2	-	0.0	-
- Mixed Retailers	4.5	4.3	4.3	4.2	4.2	3.9
Non-Store Retailing	25.2	25.3	25.3	25.5	25.5	29.5

- Direct Selling	-	-	-	-	-	-
- Homeshopping	4.6	4.5	4.5	4.6	4.6	4.1
- E-Commerce	20.6	20.8	20.8	20.9	20.9	25.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	3,719.0	3,724.6	3,724.1	3,719.6	3,712.4	3,703.7
- Desktops	431.4	393.8	359.2	327.4	298.2	271.5
- Portable Computers	3,287.5	3,330.9	3,365.0	3,392.2	3,414.2	3,432.2
-- Laptops	1,739.0	1,765.6	1,784.5	1,797.9	1,807.3	1,814.0
-- Tablets	1,548.5	1,565.3	1,580.5	1,594.3	1,606.8	1,618.2
Peripherals	1,657.8	1,679.5	1,695.4	1,707.6	1,717.2	1,725.1
- Monitors	998.9	1,011.6	1,019.3	1,024.0	1,026.8	1,028.5
- Printers	658.9	667.9	676.1	683.6	690.4	696.6
Computers and Peripherals	5,376.7	5,404.1	5,419.5	5,427.1	5,429.6	5,428.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Computers	2,538.7	2,557.3	2,570.1	2,579.3	2,586.1	2,582.8
- Desktops	270.2	242.7	217.8	195.2	174.9	156.5
- Portable Computers	2,268.4	2,314.6	2,352.4	2,384.0	2,411.2	2,426.3
-- Laptops	1,607.2	1,638.0	1,660.6	1,677.1	1,689.2	1,698.4
-- Tablets	661.3	676.6	691.8	706.9	722.1	727.9
Peripherals	306.4	310.2	312.9	314.9	316.4	318.6
- Monitors	225.4	229.4	232.3	234.6	236.4	238.0
- Printers	81.0	80.8	80.6	80.3	80.0	80.6
Computers and Peripherals	2,845.1	2,867.5	2,883.0	2,894.1	2,902.5	2,901.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.2	-0.1	-0.4
- Desktops	-8.7	-8.8	-37.1
- Portable Computers	1.3	0.9	4.4
-- Laptops	1.5	0.8	4.3
-- Tablets	1.1	0.9	4.5
Peripherals	1.3	0.8	4.1
- Monitors	1.3	0.6	3.0
- Printers	1.4	1.1	5.7

Computers and Peripherals	0.5	0.2	1.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	0.7	0.3	1.7
- Desktops	-10.2	-10.4	-42.1
- Portable Computers	2.0	1.4	7.0
-- Laptops	1.9	1.1	5.7
-- Tablets	2.3	1.9	10.1
Peripherals	1.2	0.8	4.0
- Monitors	1.8	1.1	5.6
- Printers	-0.2	-0.1	-0.4
Computers and Peripherals	0.8	0.4	2.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	3,278.4	3,412.8	3,535.4	3,654.9	3,776.4	3,902.8
- Desktops	1,571.9	1,538.2	1,515.1	1,499.1	1,488.1	1,480.4
- Portable Computers	1,706.5	1,874.6	2,020.3	2,155.7	2,288.3	2,422.3
-- Laptops	663.2	726.0	760.4	778.4	787.6	792.3
-- Tablets	1,043.3	1,148.6	1,259.9	1,377.3	1,500.7	1,630.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Computers	1,730.3	1,814.8	1,887.8	1,956.3	2,024.9	2,096.0
- Desktops	796.3	782.1	772.9	767.0	763.4	761.2
- Portable Computers	934.0	1,032.7	1,114.9	1,189.4	1,261.6	1,334.8
-- Laptops	482.1	530.3	558.3	574.8	585.2	592.7
-- Tablets	451.8	502.4	556.7	614.6	676.4	742.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total

Computers	4.1	3.5	19.0
- Desktops	-2.1	-1.2	-5.8
- Portable Computers	9.9	7.3	41.9
-- Laptops	9.5	3.6	19.5
-- Tablets	10.1	9.3	56.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	4.9	3.9	21.1
- Desktops	-1.8	-0.9	-4.4
- Portable Computers	10.6	7.4	42.9
-- Laptops	10.0	4.2	22.9
-- Tablets	11.2	10.4	64.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	16.0	19.0	22.0	25.0	27.0	30.0
Fixed	84.0	81.0	78.0	75.0	73.0	70.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

	2020	2021
Windows	18.0	17.5
iOS	22.6	22.6
Android	59.4	59.9
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Russia

Euromonitor International

August 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Lockdown exacerbates price sensitivity amongst Russians further reducing demand for computers and peripherals in 2020, although business sales benefit from distance working ...	1
Intense competition between leading players leads to further consolidation of landscape	2
Despite declining demand, e-commerce gains notable volume share over lockdown period due to competitive prices	2
RECOVERY AND OPPORTUNITIES	2
Laptops set to drive category forward but overall demand will remain weak due to lingering price sensitivity amongst Russians	2
Value growth of laptops to gain momentum towards end of forecast period driven by demand for higher specifications from gamers and tech-savvy affluent consumers	3
Retail sales of tablets and peripherals will continue to decline over the forecast period, with mainly business niche supporting demand	3
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10

Table 20	Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10
Table 21	Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22	Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23	Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN RUSSIA

KEY DATA FINDINGS

- Lockdown in 2020 compounds consumers' price sensitivity, resulting in further declining demand for computers and peripherals, although work-from-home measures support demand through business
- Computers and peripherals records 22% retail volume decline in 2020, falling to 5.8 million units
- Business laptops records highest volume growth of 1% in 2020 to reach one million units, with all retail volume sales declining
- Lenovo Group Ltd retains leadership of computers and peripherals in 2020 with a 16% volume share
- Over the forecast period, computers and peripherals is predicted to record a -6% retail volume CAGR, falling to 4.2 million units by 2025

2020 IMPACT

Lockdown exacerbates price sensitivity amongst Russians further reducing demand for computers and peripherals in 2020, although business sales benefit from distance working

Demand for computers and peripherals was already waning in Russia towards the end of the review period with many local consumers remaining conscious of their spending habits, particularly for big-ticket items, following the last economic crisis in late 2014. 2019 therefore saw declining retail volume sales for desktops, portable computers and printers, while demand for monitors to some extent was being supported by the ongoing enthusiasm for gaming in the country, with gamers investing in specific accessories such as keyboards and peripherals to enhance their experience including larger monitor screens which offer greater definition. This declining demand was exacerbated by the emergence of COVID-19 in 2020, encouraging the government to introduce various preventative measures but ultimately resulting in a lockdown in Russia on 30 March. This scenario significantly reduced demand for retail volume sales across the category, with price-sensitivity heightened due to financial concerns amidst unemployment fears, despite the extended nationwide non-working paid holiday until mid-May.

Nevertheless, business demand for laptops and tablets (the latter of which had been experiencing decline) was given a boost during lockdown, a trend that is likely to continue over the remainder of 2020 due to distance working, as companies prepared for some employees to continue working from home. This is despite the fact that many businesses, particularly small and medium enterprises, are set to struggle during 2020, but the need to renew hardware and set up distance working is likely to support ongoing demand for portable computers through business in the short to medium term.

Intense competition between leading players leads to further consolidation of landscape

Lenovo Group Ltd and Hewlett-Packard AO ZAO remained close competitors going into 2020, with the latter gaining retail volume share from the overall leader due to its position within laptops although in line with the category's overall performance during lockdown, both recorded strong volume declines. Both players offer a wide range of products at various price points, although Hewlett-Packard also benefits from business demand where its desktops are traditionally popular. Lenovo retained its leadership of laptops in retail volume terms due to its reasonable quality and wide availability; nevertheless, with businesses demanding laptops and tablets to support employees through distance working during the lockdown, both Lenovo and Hewlett-Packard are likely to benefit, which may partially offset declining demand from retail customers.

While business demand for tablets recovered in Q2 2020 due to work-from-home policies of some employees during the lockdown, retail volume sales declined as Russians focused their spending on more essential items and services. However, this category remained fairly competitive at the end of the review period, with leader Huawei and second-ranked Lenovo gaining further retail volume share as they offer tablets with an economy and mid-priced positioning, while Apple's iPad remained the leading premium tablet brand, also gaining retail volume share in 2020. In addition, Apple's MacBook continued to gain share within laptops due to consistent updates and launches such as the MacBook Pro towards the end of the review period which appeal to more affluent consumers who are less susceptible to economic changes, and are unlikely to change to another brand if they have invested in the Apple range of products.

Despite declining demand, e-commerce gains notable volume share over lockdown period due to competitive prices

With all non-essential retailers including the dominant distribution channel for computers and peripherals, electronics and appliance specialist retailers, forced to close at the end of March 2020 due to the government's response to COVID-19 resulting in lockdown across the country, demand was significantly reduced. However, retail volume sales through this channel had already been declining pre-COVID-19, due to price sensitivity amongst many Russians linked to an unstable economy over the review period and an aversion to invest in big-ticket items. This trend has led to greater share gain for e-commerce, as consumers increasingly searched for more competitive prices and promotional discounts offered in addition to attractive delivery options. While this trend continued into 2020, in line with the category's overall performance sales through e-commerce also declined, although the rate of decline was not as great as the previous year as consumers willing to trade up or invest in a computer to support the home learning of students or for more portable gaming, headed online to find more affordable prices. Electronics and appliance specialist retailers with an omnichannel strategy including an established online presence are therefore likely to have fared marginally better than physical stores.

RECOVERY AND OPPORTUNITIES

Laptops set to drive category forward but overall demand will remain weak due to lingering price sensitivity amongst Russians

Price sensitivity amongst local consumers is likely to continue heading into the forecast period with disposable incomes further reduced following lockdown measures and the fallout from COVID-19 and its impact on the economy. Therefore, demand for computers and peripherals is

predicted to continue declining throughout the forecast period with the rate of volume decline softening from 2021 onwards. In addition to an unstable economy, this performance will be influenced by a continuation of trends witnessed pre-COVID-19, with waning interest already being displayed by consumers for bulky desktops and peripherals. Moreover, concerns over limited production of components, particularly from China, due to COVID-19, may have a short-term impact on the manufacture of computers. However, demand for laptops is set to tentatively recover from 2021 onwards, for both retail and business, although the latter is predicted to record a weaker performance following 2020 and support for distance working, a trend which will also impact tablets, which is set to return to declining demand over the course of the forecast period.

Value growth of laptops to gain momentum towards end of forecast period driven by demand for higher specifications from gamers and tech-savvy affluent consumers

One note of interest for computers in Russia was the growing demand for tailor made desktops and laptops, where consumers such as gamers, in addition to businesses, have invested in customising their hardware. In addition, developments by producers have resulted in SSD, a solid-state drive which is a new generation of storage device, being increasingly used in computers and gaining ground on HDD (traditional computer hard disk drives) which could eventually make this technology more affordable.

Nevertheless, the average unit price of laptops is set to increase over the forecast period, driving up retail value sales at constant 2020 prices. This will be supported by more affluent consumers increasingly searching for the latest innovations by global brands from the likes of Apple, while gamers will further invest where possible in laptops with improved specifications if they are not willing to order tailor made options to improve their on-the-go gaming experience, with the gaming culture in Russia becoming increasingly popular.

Retail sales of tablets and peripherals will continue to decline over the forecast period, with mainly business niche supporting demand

Despite a small reprieve with increased demand through business during lockdown, a trend that is set to continue into the forecast period as some companies may continue to adopt flexible working patterns in the short term including employees working some days from home, retail volume sales of tablets are predicted to continue to decline, as laptops will remain the preferred portable computer of choice amongst consumers, with the forecast period set to see a gradual switch towards convertible laptops which offer the user greater flexibility. In addition, an increasing number of consumers prefer to use their smartphones for accessing online content and making payments, with the preference for larger-screened smartphones offering further competition to tablets, while still offering greater portability.

Moreover, the ongoing growth of laptops as the preferred choice for consumers due to their functionality and transportability, is likely to further hinder demand for peripherals over the forecast period, with ongoing volume declines for monitors, leaving a niche demand from gamers who want to enhance their experience with larger high definition screens. Printers will also continue to experience declining demand as consumers continue to go paperless in a digital and increasingly environmentally-friendly world; this category is dominated by laser printers, although ink printers will likely remain popular due to lower average unit prices.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	9,077.0	6,885.5	5,941.6	6,403.0	5,116.3	3,763.6
- Desktops	376.0	308.3	314.5	327.1	300.9	283.0
- Portable Computers	8,701.0	6,577.2	5,627.1	6,076.0	4,815.4	3,480.6
-- Laptops	2,233.0	1,971.9	2,035.0	2,584.5	2,196.8	1,647.6
-- Tablets	6,468.0	4,605.2	3,592.1	3,491.5	2,618.6	1,833.0
Peripherals	2,129.0	2,215.8	2,114.2	2,250.2	2,261.0	2,012.3
- Monitors	1,017.3	1,095.1	1,077.6	1,109.9	1,132.1	1,018.9
- Printers	1,111.8	1,120.7	1,036.6	1,140.3	1,128.9	993.4
Computers and Peripherals	11,206.0	9,101.2	8,055.8	8,653.2	7,377.3	5,776.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

RUB million	2015	2016	2017	2018	2019	2020
Computers	120,877.6	106,637.6	102,912.2	120,070.8	104,121.3	85,322.4
- Desktops	8,827.3	8,317.0	8,714.1	10,240.8	9,732.5	9,885.6
- Portable Computers	112,050.3	98,320.6	94,198.1	109,830.0	94,388.8	75,436.8
-- Laptops	58,285.4	60,685.2	64,255.4	77,524.1	69,190.3	56,563.1
-- Tablets	53,764.9	37,635.4	29,942.7	32,305.8	25,198.5	18,873.7
Peripherals	15,451.3	17,053.1	17,217.6	18,664.2	20,040.7	19,236.0
- Monitors	9,953.9	10,951.0	11,290.9	12,327.4	13,202.6	12,797.3
- Printers	5,497.5	6,102.1	5,926.7	6,336.8	6,838.1	6,438.7
Computers and Peripherals	136,328.9	123,690.7	120,129.8	138,735.0	124,162.0	104,558.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-26.4	-16.1	-58.5
- Desktops	-6.0	-5.5	-24.7
- Portable Computers	-27.7	-16.7	-60.0
-- Laptops	-25.0	-5.9	-26.2
-- Tablets	-30.0	-22.3	-71.7
Peripherals	-11.0	-1.1	-5.5
- Monitors	-10.0	0.0	0.2
- Printers	-12.0	-2.2	-10.6
Computers and Peripherals	-21.7	-12.4	-48.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total

Computers	-18.1	-6.7	-29.4
- Desktops	1.6	2.3	12.0
- Portable Computers	-20.1	-7.6	-32.7
-- Laptops	-18.3	-0.6	-3.0
-- Tablets	-25.1	-18.9	-64.9
Peripherals	-4.0	4.5	24.5
- Monitors	-3.1	5.2	28.6
- Printers	-5.8	3.2	17.1
Computers and Peripherals	-15.8	-5.2	-23.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	2,393.5	1,957.8	2,244.1	2,501.4	2,670.1	2,654.1
- Desktops	1,504.0	1,203.2	1,467.9	1,539.8	1,619.9	1,588.9
- Portable Computers	889.5	754.6	776.2	961.6	1,050.2	1,065.2
-- Laptops	757.5	680.7	721.5	909.1	1,000.0	1,014.4
-- Tablets	132.0	73.9	54.7	52.5	50.2	50.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

RUB million	2015	2016	2017	2018	2019	2020
Computers	33,531.7	31,804.0	37,219.9	43,811.5	47,781.3	47,677.7
- Desktops	20,076.5	18,133.4	22,496.6	26,194.8	29,072.6	29,214.5
- Portable Computers	13,455.2	13,670.6	14,723.3	17,616.6	18,708.7	18,463.2
-- Laptops	12,759.2	13,287.8	14,434.4	17,314.3	18,405.8	18,147.9
-- Tablets	696.0	382.8	288.9	302.4	302.9	315.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.6	2.1	10.9
- Desktops	-1.9	1.1	5.6
- Portable Computers	1.4	3.7	19.7
-- Laptops	1.4	6.0	33.9
-- Tablets	1.2	-17.4	-61.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp

	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.2	7.3	42.2
- Desktops	0.5	7.8	45.5
- Portable Computers	-1.3	6.5	37.2
-- Laptops	-1.4	7.3	42.2
-- Tablets	4.1	-14.6	-54.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume

	2018	2019	2020
Convertible	5.4	3.4	3.4
Fixed	94.6	96.6	96.6
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume

	2015	2016	2017	2018	2019	2020
Windows	2.0	1.5	1.1	0.7	0.4	0.3
iOS	8.8	7.0	4.9	8.3	12.2	12.5
Android	89.2	91.5	94.0	91.0	87.4	87.2
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume

Company	2016	2017	2018	2019	2020
Lenovo Group Ltd	12.8	11.9	12.8	15.6	14.9
Hewlett-Packard AO ZAO	9.7	11.5	12.9	13.6	14.3
Acer Inc	5.7	6.1	7.6	9.5	9.8
Huawei Digital Technologies OOO	0.8	4.5	10.1	10.1	9.4
Apple Inc	4.7	3.2	4.9	6.1	5.8
AsusTek Computer Inc	6.8	6.3	7.8	6.0	5.1
Samsung Electronics Rus OOO	7.9	5.9	3.9	3.7	4.0
Dell Russia	2.7	3.3	3.2	3.6	3.9
LG Electronics Rus OOO	2.1	2.4	2.3	2.6	3.1
Prestigio Plaza Ltd	2.4	2.2	3.0	3.0	2.8
Canon Ru OOO	2.3	2.6	2.2	2.4	2.7

Philips OOO	1.6	1.8	1.7	2.2	2.7
Merlion ZAO	2.0	2.2	2.8	2.8	2.6
Lanit ZAO	7.6	4.9	2.8	2.2	2.1
Kyocera Corp	1.8	1.9	1.6	1.8	2.1
Marvel Distribution OOO	0.7	0.9	1.0	1.4	1.7
Epson CIS OOO	0.5	0.5	1.2	1.5	1.7
Xerox Corp	0.6	1.0	1.2	1.4	1.5
Brother Industries Ltd	0.7	0.7	1.2	1.4	1.5
BenQ Corp	1.9	2.1	1.3	1.2	1.1
ViewSonic Corp	0.9	1.0	0.8	0.8	0.6
DNS OOO	0.4	0.5	0.4	0.4	0.5
Depo Computers OOO	0.3	0.4	0.4	0.4	0.5
Merlion OOO	0.3	0.3	0.3	0.3	0.4
Fujitsu Technology Solutions OOO	0.1	0.2	0.1	0.0	0.0
Avirsa Electronics ZAO	2.0	1.3	0.2	-	-
Explay ZAO	2.0	1.8	0.0	-	-
Alkotel ZAO	1.5	1.2	0.0	-	-
MegaFon OAO	1.5	0.4	-	-	-
Pocketbook Rus OOO	1.5	0.0	-	-	-
Others	14.1	16.9	12.0	6.2	5.2
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Lenovo	Lenovo Group Ltd	11.9	12.8	15.6	14.9
HP (HP Inc)	Hewlett-Packard AO ZAO	10.2	11.8	12.2	12.8
Acer	Acer Inc	6.1	7.6	9.5	9.8
Huawei (Huawei Technologies Co Ltd)	Huawei Digital Technologies OOO	4.5	10.1	10.1	9.4
Asus	AsusTek Computer Inc	6.3	7.8	6.0	5.1
Samsung (Samsung Corp)	Samsung Electronics Rus OOO	5.9	3.9	3.7	4.0
iPad	Apple Inc	2.2	3.3	4.3	4.0
Dell (Dell Technologies Inc)	Dell Russia	3.3	3.2	3.6	3.9
LG (LG Corp)	LG Electronics Rus OOO	2.4	2.3	2.6	3.1
Prestigio (Asbisc Enterprises Plc)	Prestigio Plaza Ltd	2.2	3.0	3.0	2.8
Canon (Canon Inc)	Canon Ru OOO	2.6	2.2	2.4	2.7
Philips (Koninklijke Philips NV)	Philips OOO	1.8	1.7	2.2	2.7
Digma (Nippon Klick Corp)	Merlion ZAO	2.2	2.8	2.8	2.6
Irbis	Lanit ZAO	4.9	2.8	2.2	2.1
Kyocera	Kyocera Corp	1.9	1.6	1.8	2.1
MacBook	Apple Inc	1.0	1.5	1.7	1.7
AOC (TPV Technology Ltd)	Marvel Distribution OOO	0.9	1.0	1.4	1.7
Epson (Seiko Epson Corp)	Epson CIS OOO	0.5	1.2	1.5	1.7
Xerox	Xerox Corp	1.0	1.2	1.4	1.5
Brother	Brother Industries Ltd	0.7	1.2	1.4	1.5

Samsung (HP Inc)	Hewlett-Packard AO ZAO	1.3	1.1	1.3	1.5
BenQ	BenQ Corp	2.1	1.3	1.2	1.1
Viewsonic	ViewSonic Corp	1.0	0.8	0.8	0.6
DNS	DNS OOO	0.5	0.4	0.4	0.5
Depo	Depo Computers OOO	0.4	0.4	0.4	0.5
iRU	Merlion OOO	0.3	0.3	0.3	0.4
Fujitsu (Lenovo Group Ltd)	Fujitsu Technology Solutions OOO	0.2	0.1	0.0	0.0
Wexler (Wexler Inc)	Avirsa Electronics ZAO	1.3	0.2	-	-
Explay	Explay ZAO	1.8	0.0	-	-
Texet	Alkotel ZAO	1.2	0.0	-	-
Others	Others	17.5	12.1	6.2	5.3
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	76.5	71.2	67.8	61.0	61.0	55.8
- Grocery Retailers	1.0	0.5	0.4	0.4	0.4	0.4
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	1.0	0.5	0.4	0.4	0.4	0.4
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	75.2	70.5	67.3	60.5	60.5	55.4
-- Electronics and Appliance Specialist Retailers	74.4	70.0	67.0	60.3	60.3	55.2
-- Other Non-Grocery Specialists	0.8	0.5	0.3	0.2	0.2	0.2
- Mixed Retailers	0.3	0.2	0.1	0.1	0.1	0.1
Non-Store Retailing	23.5	28.8	32.2	39.0	39.0	44.2
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	23.5	28.8	32.2	39.0	39.0	44.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	3,763.6	3,383.3	3,095.5	2,913.2	2,821.4	2,835.6
- Desktops	283.0	269.7	250.9	234.5	213.3	191.6
- Portable Computers	3,480.6	3,113.6	2,844.6	2,678.8	2,608.1	2,644.0
-- Laptops	1,647.6	1,675.5	1,709.2	1,755.2	1,805.5	1,878.5
-- Tablets	1,833.0	1,438.1	1,135.4	923.6	802.6	765.4
Peripherals	2,012.3	1,913.9	1,788.5	1,657.0	1,514.3	1,355.1
- Monitors	1,018.9	987.8	929.4	848.6	769.2	666.4
- Printers	993.4	926.1	859.1	808.4	745.1	688.7
Computers and Peripherals	5,776.0	5,297.2	4,884.0	4,570.3	4,335.8	4,190.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

RUB million	2020	2021	2022	2023	2024	2025
Computers	85,322.4	81,575.8	79,100.7	78,249.1	78,463.3	80,571.7
- Desktops	9,885.6	9,304.8	8,607.4	7,996.2	7,216.4	6,420.1
- Portable Computers	75,436.8	72,271.0	70,493.3	70,252.9	71,246.9	74,151.6
-- Laptops	56,563.1	57,691.6	59,207.9	61,284.9	63,609.4	66,977.6
-- Tablets	18,873.7	14,579.4	11,285.4	8,968.0	7,637.6	7,174.0
Peripherals	19,236.0	18,252.9	17,015.8	15,643.0	14,238.5	12,567.7
- Monitors	12,797.3	12,381.6	11,673.7	10,701.3	9,758.4	8,521.1
- Printers	6,438.7	5,871.3	5,342.0	4,941.7	4,480.1	4,046.6
Computers and Peripherals	104,558.4	99,828.8	96,116.5	93,892.1	92,701.8	93,139.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-10.1	-5.5	-24.7
- Desktops	-4.7	-7.5	-32.3
- Portable Computers	-10.5	-5.4	-24.0
-- Laptops	1.7	2.7	14.0
-- Tablets	-21.5	-16.0	-58.2
Peripherals	-4.9	-7.6	-32.7
- Monitors	-3.1	-8.1	-34.6
- Printers	-6.8	-7.1	-30.7
Computers and Peripherals	-8.3	-6.2	-27.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-4.4	-1.1	-5.6
- Desktops	-5.9	-8.3	-35.1
- Portable Computers	-4.2	-0.3	-1.7
-- Laptops	2.0	3.4	18.4
-- Tablets	-22.8	-17.6	-62.0
Peripherals	-5.1	-8.2	-34.7
- Monitors	-3.2	-7.8	-33.4
- Printers	-8.8	-8.9	-37.2
Computers and Peripherals	-4.5	-2.3	-10.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	2,654.1	2,609.7	2,564.9	2,503.8	2,449.3	2,379.5
- Desktops	1,588.9	1,543.0	1,493.4	1,421.7	1,355.2	1,272.0
- Portable Computers	1,065.2	1,066.6	1,071.6	1,082.1	1,094.1	1,107.5
-- Laptops	1,014.4	1,015.2	1,019.5	1,029.5	1,041.0	1,054.0
-- Tablets	50.8	51.5	52.1	52.6	53.1	53.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

RUB million	2020	2021	2022	2023	2024	2025
Computers	47,677.7	46,346.0	45,070.3	43,572.1	42,315.2	40,845.8
- Desktops	29,214.5	28,014.6	26,756.0	25,104.7	23,596.7	21,813.3
- Portable Computers	18,463.2	18,331.4	18,314.4	18,467.4	18,718.6	19,032.5
-- Laptops	18,147.9	18,017.1	18,003.7	18,162.1	18,420.1	18,743.1
-- Tablets	315.4	314.3	310.6	305.3	298.5	289.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-1.7	-2.2	-10.3
- Desktops	-2.9	-4.4	-19.9
- Portable Computers	0.1	0.8	4.0
-- Laptops	0.1	0.8	3.9
-- Tablets	1.3	1.0	5.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	-2.8	-3.0	-14.3
- Desktops	-4.1	-5.7	-25.3
- Portable Computers	-0.7	0.6	3.1
-- Laptops	-0.7	0.6	3.3
-- Tablets	-0.4	-1.7	-8.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	3.4	3.3	3.3	3.4	3.4	3.5
Fixed	96.6	96.7	96.7	96.6	96.6	96.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	0.3	0.1
iOS	12.5	11.4
Android	87.2	88.6
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Colombia

Euromonitor International

October 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Laptops receive A boost from home working during the extensive lockdown periods in 2020..	1
Access to technology for lower-income and rural demographics an opportunity for computers and peripherals	2
Players look to add value and attract business sales in A declining retail environment.....	2
RECOVERY AND OPPORTUNITIES	3
Laptops favoured by retail consumers	3
More positive in the business environment.....	3
Some channel shift expected going forward	4
CATEGORY DATA.....	4
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	4
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	5
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	5
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	5
Table 5 Sales of Computers by Category: Business Volume 2015-2020	6
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	6
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	6
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	6
Table 9 Sales of Laptops by Form Factor 2018-2020	7
Table 10 Sales of Tablets by Operating System 2015-2020	7
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	7
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	8
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	9
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	9
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	10
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	10
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	11
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	11
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	11
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	11

Table 23	Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN COLOMBIA

KEY DATA FINDINGS

- Laptops receives a major boost from the necessity to study and work at home during the COVID-19 epidemic in 2020
- Computers and peripherals records a retail volume decline of 4% to reach 2 million units in 2020
- Laptops records the strongest retail volume growth of 14% to reach 1.2 million units in 2020
- Hewlett-Packard Colombia leads computers and peripherals with a retail volume share of 31% in 2020
- Computers and peripherals is expected to record a negative retail volume CAGR of 3% over the forecast period to reach 1.8 million units by 2025

2020 IMPACT

Laptops receive A boost from home working during the extensive lockdown periods in 2020

As in most parts of the world during the COVID-19 pandemic, most Colombians have been forced to study and work from home during the long periods of quarantine during the COVID-19 epidemic in 2020. This is presenting a major boost to laptops during the pandemic after the steep declines witnessed throughout the review period.

This trend of remote work and study is also leading to growth for thin and easily transportable laptops which do not compromise on performance as consumers are not only using these devices at home, they are also planning for a future when the restrictions are lifted and travel is once again viable. Modern urban living means that light, slim and easy-to-carry products are increasingly attractive. Shared office environments and remote working also illustrate how society has moved beyond desktop computers, and how laptops have become the leading professional option. More traditional workspaces are also adapting, leading to a preference among businesses and consumers for laptops over desktops, with strong business volume growth for laptops recorded over the review period and moderate growth expected going forward. As the functionality of these portable products continues to improve, they are becoming the default option in the workplace.

The boost is not expected to carry over to retail sales of tablets, however, which witnessed steep falls in unit sales over the forecast period and which is only set to deepen in 2020. Many consumers are finding it difficult to justify spending on tablets when smartphones can already perform most of the tasks, whilst growing numbers are likely to opt for the flexibility of convertible laptops going forward. Even so, tablets are becoming increasingly valuable in the business environment, with companies using these for a growing number of roles in retail and hospitality, for example. Although business growth will likely decline somewhat in 2020 as some companies ease off on their investments, strong growth is expected to continue going forward as businesses continue to look to this flexible technology to improve their processes.

Computers are increasingly marketed to key niche segments, such as gamers and designers, to add value. The need for high-performance products means that consumers are looking for specific attributes to improve their experience. Gaming will be an important driver in sales in

these categories, especially during quarantine. Gaming laptops are increasingly featuring advanced technology in all price segments, which is helping segmentation and expanding the size of the category. Whilst still in its infancy, this aspect of laptops is growing. The main brands catering to gamers are Omen (Hewlett-Packard Colombia), Alien Ware (Dell Columbia) and Predator (Acer Computer Columbia).

Access to technology for lower-income and rural demographics an opportunity for computers and peripherals

The quarantine periods have reemphasised the wide gap that still exists in terms of equipment acquisition and digitisation between wealthier Colombians and the more vulnerable population. This has limited the possibility of students with less economic possibilities to continue their studies during social isolation. The COVID-19 crisis has made the issue of access to equipment an educational priority, and this could translate into an opportunity for desktop, laptop and tablet brands to grow volume sales in their commercial businesses, and allows them to support a segment of society with less purchasing power. The need to equip rural and low-income homes has been recognised as a priority by the government, which is likely to introduce ongoing initiatives in this area going forward. Access to the internet will continue to expand, opening up access to new entertainment and digital commerce to many more consumers, and thus support retail sales of products such as laptops going forward.

Hewlett-Packard Colombia has been highly active in expanding its distribution facilities to provide better service to its clients and has been actively supporting the “Vive Digital” programme, taking computing solutions to remote rural areas of the country and supplying computers to public schools nationwide. Social responsibility is the player’s core marketing strategy, and this approach will resound well among consumers after the severe impacts of the COVID-19 epidemic.

Players look to add value and attract business sales in A declining retail environment

Given the positive outlook for business unit sales in contrast with the declines expected in retail sales, manufacturers are increasingly focusing their products on business customers. The principal brands are offering light, slim and easy-to-carry products that are increasingly attractive to business users who require portability and uncompromised performance. Brands with low retail shares in laptops and desktops are investing heavily in business-to-business and institutional sales. Brands such as Asus and Dell have been highly active in expanding their distribution facilities to provide better service to their business clients, whilst also actively working to close the digital gap by trying to reach rural and depressed areas through social and government programmes.

Tablets are being cannibalised by increasing usage of smartphones by retail consumers. Samsung Electronics Colombia is responding to this by focusing more on value over volume sales by offering tablets specifically designed for certain business uses. The brand is betting on more specialised and niche audiences such as designers, who need a more sophisticated device.

Products such as monitors and printers, which have an established market but are not introducing major innovations and do not generate large margins, are stabilising around the category leaders and encouraging smaller competitors to exit the retail environment, which is set to lead to increasing consolidation in the competitive environment of these products.

RECOVERY AND OPPORTUNITIES

Laptops favoured by retail consumers

Computers and peripherals is set to continue to record moderate unit sales declines in the retail environment over the forecast period. Desktops will become increasingly unpopular, recording unit volumes in 2025 at less than half the levels of those predicted for 2020. These products are increasingly becoming the realm of specialist freelancers and home workers, such as graphic designers, and high-end brands such as HP and Apple will likely continue to add value for these users, resulting in good average unit price growth over the forecast period when measured at constant 2020 levels. In parallel, monitors is also set to suffer steep declines and record less than half the retail unit volumes in 2025 than those expected for 2020. Consumers purchasing monitors will increasingly opt for higher-specification products offering fast and high-quality graphics. Purchasers will again likely be homeworking designers and serious gamers, who wish to have the best possible video quality for their activities. This will also be reflected in steep average unit price increases over the forecast period at constant 2020 levels.

After the experiences of studying and working from home during the periods of COVID-19 lockdowns in 2020, consumers will continue to favour the flexibility of laptops and increasingly opt for convertibles over the forecast period. Many will likely continue to study and work from home, at least part of the time, in order to limit their social contacts after the lessons of the pandemic. Portability and performance will therefore be key in computers and peripherals going forward and laptops is set to be the only product to enjoy retail unit sales growth over the forecast period. Prices will also witness an upward trend as consumers invest in faster and more powerful laptops, featuring the latest chip sets, SSD disks and high-quality screens.

In the retail environment, manufacturers have been focusing on offering products designed for gaming enthusiasts for some time, and this is set to remain a key audience going forward. These consumers not only need increasingly high-specification laptops in order to get the best experience from new and power-hungry games, but they also appreciate the portability that laptops bring.

Players will likely invest in marketing with a keen social responsibility emphasis going forward. The COVID-19 epidemic will have badly impacted lower-income consumers in particular, and digital education and sponsorships aimed at improving the life chances of these demographics will be well received and bring some positivity after the severe impacts of the pandemic.

More positive in the business environment

The business environment, however, is set to offer a more positive picture, with business unit sales growth expected in all categories within computers over the forecast period. After the enormous impact of the pandemic on businesses, with turnover and profits likely to be severely impacted in 2020, staff lay-offs and drastic changes to working practices, businesses will wish to invest in making their processes and staff more efficient going forward. This will favour sales of tablets, which are increasingly helping businesses in hospitality and distribution, for example, to provide more seamless services to their customers, particularly when used by mobile employees.

In contrast with the retail environment, desktops will remain popular among businesses. Despite the increase in homeworking during the pandemic, many staff are office-based and given strict hygiene and social distancing measures, this will remain an important aspect of employment going forward. Desktops offer powerful solutions for a multitude of office tasks.

However, laptops will also remain in demand among businesses for their mobile employees and those who occasionally work from home. As witnessed during the pandemic, laptops can

not only enable remote working with secure access to office systems, they can also enable employees to have virtual meetings using applications such as Zoom or Skype.

Some channel shift expected going forward

Electronics and appliance retailers remained the main retail channel for sales of computers and peripherals at the end of the review period. These outlets not only offer a wide range of all types of these products, they also employ knowledgeable staff who can provide invaluable advice to customers around the rapidly changing technology and products in this category. Many also offer regular promotions and end-of-life discounts and are popular among all income-groups in the country. Despite being forced to close during the lockdown period, these factors are set to stand the channel in good stead in 2020, unlike in some other countries where these outlets are set to record steeper declines in its share.

However, e-commerce is benefiting globally from the various lockdowns in sales of computers and peripherals in 2020 and Colombia is unlikely to be an exception. Even so, it will take share from a number of other channels in the country, including hypermarkets, supermarkets and mixed retailers, as well as from the specialist channel. Hypermarkets has an unusually high share in computers and peripherals in Colombia. Although these outlets often carry limited ranges and offer little in the way of advice, they do have attractive prices on the ranges they stock, which makes them an attractive option for lower-income consumers. Even though these outlets have remained open during the COVID-19 epidemic, some consumers have tried to limit their shopping here to more essential food and hygiene products out of budgetary concerns and the desire to limit their time in the outlets in order to reduce their social contact.

Intense growth was witnessed in the numbers of Colombians engaging with the digital landscape at the end of the review period. Two-thirds of Colombians now regularly use the internet and with just under half of the country's overall population regularly using mobile devices to access the internet, the consumer audience for digital commerce is reaching critical mass and continues to expand. In major urban areas, notably the capital Bogotá, the expanding consumer base of affluent urban professionals with increasingly hectic lifestyles means rapidly increasing demand for e-commerce and a wide range of online services that offer greater convenience and in many cases excellent value for money as well. The expanding interest in the digital realm is also due to improvements in the telecommunications infrastructure, with the spread of high-speed and mobile internet coverage throughout the country having played a major role in opening up access to the digital landscape for millions of Colombians over the course of the review period.

E-commerce is therefore set to prosper going forward, with more consumers discovering the wide range of products available and low prices on offer. The contactless shopping model is also likely to remain important to many, even as the pandemic hopefully recedes.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	2,726.0	2,384.2	2,085.3	1,917.3	1,838.8	1,806.7
- Desktops	358.0	320.7	287.0	266.9	254.3	209.2
- Portable Computers	2,368.0	2,063.5	1,798.2	1,650.4	1,584.5	1,597.5
-- Laptops	1,208.2	1,105.3	1,064.4	1,046.3	1,055.7	1,206.6
-- Tablets	1,159.8	958.2	733.8	604.1	528.8	390.9

Peripherals	356.9	344.4	336.7	302.9	290.0	240.5
- Monitors	47.0	49.7	53.2	55.4	56.1	48.7
- Printers	309.9	294.7	283.5	247.5	233.9	191.8
Computers and Peripherals	3,082.9	2,728.7	2,422.0	2,220.2	2,128.9	2,047.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

COP billion	2015	2016	2017	2018	2019	2020
Computers	2,820.1	2,761.9	2,775.9	2,791.2	2,678.3	2,643.9
- Desktops	403.2	398.4	394.7	394.2	375.8	329.7
- Portable Computers	2,416.9	2,363.5	2,381.3	2,397.0	2,302.5	2,314.2
-- Laptops	1,840.4	1,748.4	1,744.0	1,762.4	1,713.4	1,835.4
-- Tablets	576.5	615.1	637.2	634.6	589.1	478.8
Peripherals	98.8	96.9	99.1	95.4	102.2	103.4
- Monitors	17.3	20.3	25.8	29.7	34.1	38.3
- Printers	81.4	76.6	73.3	65.7	68.1	65.1
Computers and Peripherals	2,918.8	2,858.8	2,875.1	2,886.6	2,780.5	2,747.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.7	-7.9	-33.7
- Desktops	-17.7	-10.2	-41.6
- Portable Computers	0.8	-7.6	-32.5
-- Laptops	14.3	0.0	-0.1
-- Tablets	-26.1	-19.5	-66.3
Peripherals	-17.1	-7.6	-32.6
- Monitors	-13.2	0.7	3.6
- Printers	-18.0	-9.1	-38.1
Computers and Peripherals	-3.8	-7.9	-33.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-1.3	-1.3	-6.2
- Desktops	-12.3	-3.9	-18.2
- Portable Computers	0.5	-0.9	-4.3
-- Laptops	7.1	-0.1	-0.3
-- Tablets	-18.7	-3.6	-16.9
Peripherals	1.2	0.9	4.7
- Monitors	12.4	17.2	121.4
- Printers	-4.4	-4.4	-20.1
Computers and Peripherals	-1.2	-1.2	-5.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	1,761.9	1,908.9	2,032.7	2,153.3	2,272.4	2,318.1
- Desktops	727.9	760.4	790.8	820.9	850.4	841.0
- Portable Computers	1,034.0	1,148.5	1,241.9	1,332.4	1,422.0	1,477.1
-- Laptops	926.2	949.5	978.9	1,026.2	1,075.3	1,093.6
-- Tablets	107.8	199.0	263.0	306.3	346.7	383.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

COP billion	2015	2016	2017	2018	2019	2020
Computers	2,344.3	2,616.3	2,979.7	3,198.2	3,384.7	3,483.9
- Desktops	950.7	1,062.9	1,208.6	1,210.4	1,208.6	1,171.9
- Portable Computers	1,393.6	1,553.4	1,771.1	1,987.8	2,176.1	2,312.0
-- Laptops	1,280.9	1,397.5	1,575.3	1,773.6	1,949.6	2,075.8
-- Tablets	112.7	155.9	195.8	214.3	226.5	236.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	2.0	5.6	31.6
- Desktops	-1.1	2.9	15.5
- Portable Computers	3.9	7.4	42.8
-- Laptops	1.7	3.4	18.1
-- Tablets	10.6	28.9	255.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	2.9	8.2	48.6
- Desktops	-3.0	4.3	23.3
- Portable Computers	6.2	10.7	65.9
-- Laptops	6.5	10.1	62.1
-- Tablets	4.3	16.0	109.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	15.0	18.0	16.0
Fixed	85.0	82.0	84.0
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	2.0	1.8	1.7	1.4	1.1	1.0
iOS	8.7	11.4	13.5	15.9	18.8	17.1
Android	76.3	65.5	58.1	57.5	56.5	55.6
BlackBerry OS	-	-	-	-	-	-
Other	13.0	21.2	26.7	25.1	23.7	26.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Hewlett-Packard Colombia Ltda	20.6	23.8	25.6	27.7	31.1
Lenovo (Asia Pacific) Ltd Sucursal Colombia	19.5	21.7	23.0	22.5	23.4
AsusTek Computer Inc	4.9	7.7	8.7	11.5	13.9
Apple Inc	7.8	8.4	8.9	9.4	8.2
Epson Colombia Ltda	4.7	5.3	5.1	5.1	4.0
Huawei Technologies Colombia SAS	4.5	5.0	5.1	4.8	4.0
Acer Computer Colombia SA	3.4	3.4	3.6	3.9	4.0
Samsung Electronics Colombia SA	9.9	7.8	4.5	3.2	2.5
Dell Colombia Inc	1.7	1.3	1.0	0.9	0.8
Datacol SA	0.7	0.6	0.5	0.5	0.4
LG Electronics Colombia Ltda	0.1	0.2	0.2	0.3	0.2
PC Smart SA	2.7	0.6	0.6	-	-
Compumax Zona Franca SA	0.6	0.5	0.3	-	-
ViewSonic Latin America	0.0	0.0	0.0	-	-
Lanix Colombia SAS	1.2	-	-	-	-
Toshiba de Colombia SA de CV	0.8	-	-	-	-
Kyocera Wireless Corp	0.2	-	-	-	-
BenQ Corp	-	-	-	-	-

Lexmark International Trading Corp	-	-	-	-	-
Sony Interamerican SA Sucursal Colombia	-	-	-	-	-
Others	16.7	13.9	12.9	10.2	7.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard Colombia Ltda	23.8	25.6	27.7	31.1
Lenovo (Lenovo Group Ltd)	Lenovo (Asia Pacific) Ltd Sucursal Colombia	21.7	23.0	22.5	23.4
Asus	AsusTek Computer Inc	7.7	8.7	11.5	13.9
MacBook	Apple Inc	3.4	3.7	4.0	4.3
Epson (Seiko Epson Corp)	Epson Colombia Ltda	5.3	5.1	5.1	4.0
Huawei (Huawei Technologies Co Ltd)	Huawei Technologies Colombia SAS	5.0	5.1	4.8	4.0
Acer (Acer Inc)	Acer Computer Colombia SA	3.4	3.6	3.9	4.0
iPad	Apple Inc	4.1	4.3	4.7	3.3
Samsung (Samsung Corp)	Samsung Electronics Colombia SA	7.8	4.5	3.2	2.5
Dell (Dell Technologies Inc)	Dell Colombia Inc	1.3	1.0	0.9	0.8
Mac	Apple Inc	0.8	0.9	0.8	0.6
Canon (Canon Inc)	Datacol SA	0.6	0.5	0.5	0.4
LG (LG Corp)	LG Electronics Colombia Ltda	0.2	0.2	0.3	0.2
PC Smart	PC Smart SA	0.6	0.6	-	-
Compumax	Compumax Zona Franca SA	0.5	0.3	-	-
Viewsonic (ViewSonic Corp)	ViewSonic Latin America	0.0	0.0	-	-
BenQ	BenQ Corp	-	-	-	-
Dell (Dell Inc)	Dell Colombia Inc	-	-	-	-
HP (Hewlett-Packard Development Co LP)	Hewlett-Packard Colombia Ltda	-	-	-	-
Kyocera (Kyocera Corp)	Kyocera Wireless Corp	-	-	-	-
Lanix (Corporativo Lanix SA de CV)	Lanix Colombia SAS	-	-	-	-
Lexmark (Lexmark International Inc)	Lexmark International Trading Corp	-	-	-	-
Sony (Sony Corp)	Sony Interamerican SA Sucursal Colombia	-	-	-	-
Toshiba (Toshiba Corp)	Toshiba de Colombia SA de CV	-	-	-	-
Others	Others	13.9	12.9	10.2	7.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	97.0	96.5	96.0	94.8	93.6	89.2
- Grocery Retailers	30.9	36.7	35.7	35.0	34.1	32.5
-- Discounters	0.3	0.3	0.2	0.2	0.2	-
-- Hypermarkets	27.6	33.4	32.4	31.9	31.1	30.4
-- Supermarkets	3.0	3.1	3.0	2.9	2.7	2.1
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	61.6	54.1	54.4	54.6	53.9	52.2
-- Electronics and Appliance Specialist Retailers	61.2	53.7	54.1	54.4	53.8	52.0
-- Other Non-Grocery Specialists	0.4	0.4	0.3	0.1	0.1	0.1
- Mixed Retailers	4.5	5.7	6.0	5.2	5.7	4.6
Non-Store Retailing	3.0	3.5	4.0	5.2	6.4	10.8
- Direct Selling	0.5	0.5	0.6	0.6	0.6	0.5
- Homeshopping	-	-	-	-	-	-
- E-Commerce	2.5	3.0	3.4	4.6	5.8	10.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	1,806.7	1,751.5	1,717.4	1,679.2	1,647.5	1,620.7
- Desktops	209.2	178.0	149.2	130.0	110.9	96.2
- Portable Computers	1,597.5	1,573.5	1,568.3	1,549.2	1,536.6	1,524.5
-- Laptops	1,206.6	1,239.5	1,269.0	1,281.1	1,296.3	1,312.0
-- Tablets	390.9	334.0	299.2	268.1	240.2	212.5
Peripherals	240.5	220.2	201.7	184.7	170.7	157.2
- Monitors	48.7	41.1	34.7	29.3	24.6	20.8
- Printers	191.8	179.0	167.0	155.4	146.0	136.5
Computers and Peripherals	2,047.2	1,971.7	1,919.1	1,863.9	1,818.1	1,777.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

COP billion	2020	2021	2022	2023	2024	2025
Computers	2,643.9	2,690.0	2,770.5	2,821.8	2,882.8	2,920.7
- Desktops	329.7	273.3	266.3	252.8	236.5	221.5
- Portable Computers	2,314.2	2,416.7	2,504.2	2,569.0	2,646.3	2,699.2
-- Laptops	1,835.4	2,033.4	2,191.3	2,311.2	2,431.9	2,507.3
-- Tablets	478.8	383.3	312.9	257.8	214.4	191.9
Peripherals	103.4	96.0	91.6	86.9	82.4	78.0
- Monitors	38.3	36.2	33.8	31.4	29.4	27.3
- Printers	65.1	59.8	57.8	55.6	53.1	50.7

Computers and Peripherals	2,747.3	2,786.0	2,862.1	2,908.8	2,965.2	2,998.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-3.1	-2.2	-10.3
- Desktops	-14.9	-14.4	-54.0
- Portable Computers	-1.5	-0.9	-4.6
-- Laptops	2.7	1.7	8.7
-- Tablets	-14.6	-11.5	-45.6
Peripherals	-8.5	-8.1	-34.6
- Monitors	-15.5	-15.7	-57.3
- Printers	-6.7	-6.6	-28.9
Computers and Peripherals	-3.7	-2.8	-13.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	1.7	2.0	10.5
- Desktops	-17.1	-7.6	-32.8
- Portable Computers	4.4	3.1	16.6
-- Laptops	10.8	6.4	36.6
-- Tablets	-19.9	-16.7	-59.9
Peripherals	-7.2	-5.5	-24.5
- Monitors	-5.7	-6.5	-28.7
- Printers	-8.1	-4.9	-22.1
Computers and Peripherals	1.4	1.8	9.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	2,318.1	2,365.2	2,410.1	2,475.7	2,545.4	2,629.1
- Desktops	841.0	835.7	834.6	857.9	888.3	925.9
- Portable Computers	1,477.1	1,529.5	1,575.5	1,617.8	1,657.1	1,703.2
-- Laptops	1,093.6	1,112.8	1,126.6	1,141.0	1,152.4	1,163.8
-- Tablets	383.6	416.7	449.0	476.8	504.8	539.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

COP billion	2020	2021	2022	2023	2024	2025
Computers	3,483.9	3,487.4	3,488.8	3,555.0	3,618.3	3,730.4
- Desktops	1,171.9	1,109.6	1,057.9	1,076.5	1,103.5	1,138.7
- Portable Computers	2,312.0	2,377.9	2,430.9	2,478.5	2,514.8	2,591.7
-- Laptops	2,075.8	2,139.6	2,192.9	2,242.4	2,280.7	2,356.7
-- Tablets	236.2	238.3	238.0	236.0	234.2	235.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	2.0	2.5	13.4
- Desktops	-0.6	1.9	10.1
- Portable Computers	3.5	2.9	15.3
-- Laptops	1.8	1.3	6.4
-- Tablets	8.6	7.1	40.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.1	1.4	7.1
- Desktops	-5.3	-0.6	-2.8
- Portable Computers	2.8	2.3	12.1
-- Laptops	3.1	2.6	13.5
-- Tablets	0.9	-0.1	-0.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	16.0	25.0	30.0	35.0	40.0	40.0
Fixed	84.0	75.0	70.0	65.0	60.0	60.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	1.0	0.9
iOS	17.1	19.0
Android	55.6	55.5
BlackBerry OS	-	-
Other	26.3	24.6
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

El aislamiento impulsa la demanda de computadores

Las cifras, especialmente de portátiles, aumentan según el reporte de la industria. Las ventas virtuales se potenciaron.

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El trabajo y el estudio en casa obligaron a muchos colombianos a modernizar o a comprar equipos. ISTOCK

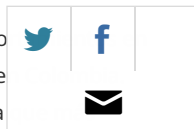
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La necesidad de las familias de trabajar y estudiar desde la casa ha generado un aumento en la compra de computadores, especialmente portátiles. Así lo muestran las cifras de la industria y de varias empresas del sector.

(Lea: Claves para que las compañías se adapten a la nueva realidad)

“Hemos podido hacer comparaciones con otros países y los compo China, España e Italia, por la cuarentena, ha sido bastante similar e Online es el que crece, computadores es la categoría de tecnología aumenta”, señala Adriana Téllez, Industry Sales Director de GFK, especializada en hacer seguimiento a este mercado.



(Lea: MercadoLibre contratará a especialistas en informática en Colombia)

Definitivamente, los portátiles representan el 87% de las ventas. Acumulado, de enero a abril de este año, frente a igual período del año pasado creció 21% en unidades y un 32% en valor, que corresponde a 217.596 aparatos.

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Si se compara lo comercializado en abril vs. marzo del 2020, el aumento es del 61%, por la intensificación del aislamiento. En mayo también se nota un crecimiento fuerte, comentó la experta. Para esa época, el precio promedio el año pasado era aproximadamente de \$1,4 millones y ahora está en \$1.5 millones.

Las ventas virtuales, partiendo de bajas unidades vendidas, crecieron 100% en abril frente al mes precedente, mientras que respecto a abril del 2019 el aumento fue del 900%.

Se ve una mayor confianza del consumidor para utilizar la tarjeta de crédito. El cliente hace un presupuesto según sus necesidades, utiliza Internet para comparar y toma la decisión de compra.

En computadores en total (entre aparatos de escritorios y portátiles) tiene aumentos del 6% en unidades (326.000) y 14% en valor.

El valor promedio de la categoría es \$1.590.000. Al respecto, Santiago Holguín, gerente de Lenovo, explica que el aislamiento preventivo obligatorio ha llevado a unos cambios en los volúmenes y en la facturación de estos equipos.

Las personas que están en sus casas están pidiendo más computadores, principalmente notebooks, además señala que algunas cadenas pasaron de vender 15% por Internet y pasaron a 60%

Al señalar el comportamiento en el segmento corporativo, considera que en la industria media se ha retrocedido bastante la venta, ya que muchas están analizando más este tipo de inversiones y si tenían planeado algún plan de mejora tecnológico, la han postergado o la han hecho pero de menor precio, buscando maximizar los recursos.

En el caso de la gran empresa, los proyectos han tenido algún retraso por el cierre de las oficinas, aunque muchas de ellas tuvieron que facilitarle portátiles a los empleados que empezaron a teletrabajar. Esto se notó en la última semana de marzo y comienzos de abril.

“El consumidor final se está dando cuenta que esta situación va a durar un buen tiempo y muchas familias necesitan un equipo para cada uno, como pasa con el celular que no se comparte, por ser una herramienta de uso permanente para el colegio y el trabajo”, precisa Santiago Holguín.

DINÁMICA INTERESANTE

Los sitios de comercio virtual coinciden en la dinámica. Juan Camilo Pachón, Head de Marketplace de Mercado Libre Colombia, indicó que al comparar mayo pasado frente al mes inmediatamente anterior, es decir mayo, el mayor interés en estos productos se evidenció en un aumento del 11% en las búsquedas, mientras que las ventas crecieron 27%.

'retailers' por el Covid 19 o el impacto que ha tenido la pandemia en algunas campañas provocó una disminución de las ventas de equipo en el país en marzo y abril. **Sin embargo, en la medida en que se ha facilitado la compra online, ha aumentado la demanda de productos de consumo respondiendo a una necesidad actual: el home office y la educación virtual”.**

“Hemos experimentado un gran crecimiento de la venta online, que antes era de alrededor del 5% y ahora es de casi el 50%. El aporte de Acer ha sido importante, trayendo equipos de gamas más bajas, a precios por debajo de IVA, por la alta necesidad del mercado al requerir equipos para trabajar y estudiar en casa, mas aun cuando la penetración de computadores en Colombia es solo del 44%”, señaló.

Hugo Beleño, gerente Asus Colombia comentó que el crecimiento en el mercado local viene dado no solo por la oferta de valor de las marcas y una buena labor de los distribuidores, sino también por algo que nadie pronosticaba: **el inicio de la cuarentena y sus continuas prolongaciones. “Vemos un cierre de primer semestre positivo y un comienzo de segundo semestre con fuertes temporadas de regreso a clases de colegios y universidades”, puntualizó.**

Ante el panorama, HP Inc, otro actor del mercado, habilitó promotores virtuales que ayudan a los usuarios a elegir el equipo ideal. El proyecto que lleva 6 semanas tiene resultados con incremento en las ventas : notebooks (14,8%), impresoras de carga continua (21,8%) y desktops (13.37%).

“Queremos seguir siendo líderes en transformación digital y este es un peldaño más con el que aseguramos que vamos por buen camino: hoy, 21% de las ventas en tiendas físicas han sido acompañadas por promotoría virtual”, afirmó Mateo Figueroa, gerente general de HP Inc. en Colombia.

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Computers and Peripherals in Argentina

Euromonitor International

October 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Laptops lead the landscape, as consumers invest in home office equipment during the COVID-19 lockdown	1
E-commerce sales rise as consumers prefer the safer way of shopping from home	1
Hewlett-Packard leads the landscape, as Epson Argentina increases its share, benefiting from rising sales of printers as consumers create home-offices	2
RECOVERY AND OPPORTUNITIES	2
The economic recession will continue to challenge sales, as computers and peripherals records an even deeper volume decline across the forecast period	2
Desktop sales set to suffer as laptops benefit from being portable, whereas tablets face competition from smartphones and laptops	3
Printers and monitors record ongoing volume declines as lack of portability partners with eco-friendly activities to dampen sales across the forecast period	3
CATEGORY DATA.....	3
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	3
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	4
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	4
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	4
Table 5 Sales of Computers by Category: Business Volume 2015-2020	5
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	5
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	5
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	5
Table 9 Sales of Laptops by Form Factor 2018-2020	6
Table 10 Sales of Tablets by Operating System 2015-2020	6
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	6
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	7
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	8
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	8
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	9
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	9
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	9
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	10
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	10

Table 20	Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	10
Table 21	Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	10
Table 22	Forecast Sales of Laptops by Form Factor 2020-2025	11
Table 23	Forecast Sales of Tablets by Operating System 2020-2021	11

COMPUTERS AND PERIPHERALS IN ARGENTINA

KEY DATA FINDINGS

- The outbreak of COVID-19 boosts sales of home-office equipment such as laptops and printers in Q1 and Q2, however, the overall increase in price-sensitivity damages growth for computers and peripherals
- Computers and peripherals records a retail volume decline of 6% in 2020 to stand at 1.1 million units and ARS18.1 billion
- Laptops records the weakest volume decline of 3% to sit at 225,800 units in 2020
- Hewlett-Packard Argentina SRL leads the competitive landscape, with a volume share of 25% in 2020
- Computers and peripherals is expected to record a negative 8% retail volume CAGR over the forecast period to reach 757,600 units by 2025

2020 IMPACT

Laptops lead the landscape, as consumers invest in home office equipment during the COVID-19 lockdown

In 2020, COVID-19 is predicted to have a significant impact on the economy; however, some areas in consumer electronics are set to remain more robust than others. The requirement to work and stay at home, resulted in increased sales of home office equipment, with consumers investing more in laptops, tablets and printers during Q1 and Q2 of 2020. With increased time spent at home, subscription services saw an increase in new subscribers, with services such as Netflix requiring tablets, TV, smartphones or laptops to view. Among these subscription services, the biggest winners were the e-learning platforms, online meeting rooms (such as Zoom) and entertainment streaming including Netflix, and online games. Therefore, working from home and the requirement for increased at-home entertainment helped boost sales of laptops, which is set to record the weakest volume decline in 2020.

Although COVID-19 initially propelled the volume of sales of laptops and related accessories, they are not expected to drive growth during 2020, as the increased investment in these items is predicted to end. Therefore, the expected sales decline along 2020 stemming from the economic recession, will outperform the temporary rise in sales in Q1 and Q2 of 2020. However, computers and peripherals will be the least harmed by the local economic crisis than other areas in consumer electronics.

E-commerce sales rise as consumers prefer the safer way of shopping from home

In 2019, computers and peripherals recorded the highest use of e-commerce. In 2020, more than 20% of the retail volume of sales of these devices are expected to be sold through retailer's e-commerce platforms, or specialist e-commerce platforms, such as Mercadolibre. This will be a direct response to the COVID-19 pandemic, with stores closed across the country. Even when stores open, consumers may continue to choose to stay in the comfort and safety of their own

home, avoiding trips in public through fear of contracting the virus – turning to e-commerce instead of visiting retailers.

The improved detailed description and clear images presented by retailers on their platforms was a key driver of online sales in 2019 and is set to aid further growth in 2020.

Hewlett-Packard leads the landscape, as Epson Argentina increases its share, benefiting from rising sales of printers as consumers create home-offices

Hewlett-Packard and Epson Argentina are set to remain the strongest players in computers and peripherals in Argentina in 2020. However, leader Hewlett-Packard is set to post a decline in both volume growth and market share in 2020, whereas Epson will increase its share and volume growth, benefiting from increased sales of its printers as consumers create home-offices during the COVID-19 lockdown.

Lenovo and Hewlett-Packard have the leading positions in laptops, with their joint share accounting for over half of the market. Lenovo's leadership is based on its wide range of models, readily available in Argentina, with specific models focused on different needs; including gaming, business, and general use. Hewlett-Packard is set to maintain its high performance in 2020, focusing on the growing premium computers' segment.

There are two different types of tablets in Argentina; the small market for 10 inches' screen size devices in which Apple and Samsung are the most renown and expensive brands, with players such as Lenovo, X-View, AVH and TCL available on the landscape, which tend to appeal to self-employed people and small businesses. There is also the market for 7 inches' tablet screens. In Argentina, leading brands do not have incentives to participate in the 7-inch landscape, as it is mainly focused on cheap models of Chinese origin, with these devices primarily used to entertain children. Cheap models are on offer below USD125 per unit and account for more than 80% of the market value. As such, there is no brand that achieves more than 7% of the market share in tablets; however, private brands as a whole, are the clear leaders of the landscape.

Both monitors and printers are characterised by being led by a few brands. South Korean companies Samsung and LG have traditionally been rivals in monitors, with the latter gaining share over the review period, due to its strategy of focusing on the sale of large-screen models, specifically over 27" inches. However, in 2020, Philips Argentina SA is set to take the second-place spot, benefiting from an uplift in its monitor sales, and consumers reach for lower unit prices to create home offices during the outbreak of COVID-19. As such, Philips Argentina is set to increase its volume share, while Samsung and LG both record declines. Printers will continue to have a duopoly in 2020 in the form of HP and Epson. While HP focuses on peripherals, such as ink cartridges and Epson on printers, both brands base their success on the permanent innovation of their products and strong brand image. Moreover, Epson's printers are much more expensive than those of HP.

RECOVERY AND OPPORTUNITIES

The economic recession will continue to challenge sales, as computers and peripherals records an even deeper volume decline across the forecast period

Volume growth in computers and peripherals is expected to record a decline in 2020, with COVID-19 increasing price-sensitivity in the country, with the economic recession hampering sales. While sales of laptops, printers and monitors were initially boosted by consumers working

from home, overall, all product areas will decline in 2020, with tablets performing the worst. Into 2021, the decline in computers and peripherals is set to increase, with consumers no longer being motivated to purchase items for home offices, having made these purchases in Q1 and Q2 of 2020. In addition, all product areas are expected to record a deeper decline than in 2020, with the economic recession severely damaging volume sales, as consumers move away from big-ticket items to focus on essential and necessary purchases. Therefore, volume decline is predicted for the full forecast period, and the industry is expected to record a negative 7% retail volume CAGR over the forecast period, with tablets, desktops and monitors expected to have the weakest performances.

Desktop sales set to suffer as laptops benefit from being portable, whereas tablets face competition from smartphones and laptops

Computers is predicted to face a sharp decline in the forthcoming years, with the outlook for tablets and desktops worse than the predictions for laptops. Portability is the main element set to work against desktops; consumers want to use easy-to-carry devices without sacrificing performance. Although tablets are portable, they face increasing competition from smartphones, as well as affordably-price laptops. In addition, the outbreak of COVID-19 in the country could increase the number of consumers that work from home in future. For these workers, laptops provide the benefit of being able to work from any spot in the home, as well as taking work to local cafes, bars, or continuing work when commuting. In addition, modern working trends, such as shared office environments and home office schemes, favour laptop use above desktops. However, desktops will continue to benefit from the gaming landscape in Argentina. Gaming PCs are typically more expensive and have a better performance than traditional desktops, as gamers seek a top-quality gaming experience. As such, gaming accessories are also predicted to increase over the forecast period, growing from the rising gaming trend.

Printers and monitors record ongoing volume declines as lack of portability partners with eco-friendly activities to dampen sales across the forecast period

Printers saw an increase in sales in Q1 of 2020, benefiting from the first weeks of lockdown. Sales were triggered by the expansion of home offices, and by the need to print workbooks and notes related to school and universities education, which cannot always be done on a computer. However, the increase in sales is not enough to have a lasting positive effect on the landscape, and printers is set to record a volume decline in 2020.

Moving into the forecast period, both monitors and printers are set to record an ongoing volume decline for each year. The lack of portability offered by desktops, and the popularisation of laptops across the last decade, is set to continue hampering growth for the monitors market. At the same time, eco-friendly activities, including the use of less paper in both working and private environments, will decrease the volumes of sales of printers across the next five years. In addition, printers will also be impacted by the government's policy of digitalising procedures, with the goal to reduce bureaucracy, especially in the City of Buenos Aires.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020

Computers	1,769.1	1,711.4	1,922.6	1,382.0	737.5	688.5
- Desktops	280.8	240.4	250.0	224.4	110.4	102.3
- Portable Computers	1,488.3	1,471.0	1,672.6	1,157.6	627.1	586.2
-- Laptops	705.7	572.1	535.1	450.5	264.0	255.8
-- Tablets	782.6	898.9	1,137.5	707.1	363.1	330.4
Peripherals	618.7	627.4	563.9	609.5	494.1	468.2
- Monitors	186.2	164.6	120.2	98.1	73.6	68.4
- Printers	432.5	462.7	443.7	511.4	420.5	399.8
Computers and Peripherals	2,387.7	2,338.7	2,486.5	1,991.5	1,231.5	1,156.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

ARS million						
	2015	2016	2017	2018	2019	2020
Computers	12,359.4	13,759.1	11,939.3	13,073.3	11,061.2	15,183.3
- Desktops	3,007.3	3,047.6	2,705.0	3,066.5	2,241.0	2,974.3
- Portable Computers	9,352.1	10,711.4	9,234.3	10,006.7	8,820.1	12,209.0
-- Laptops	7,010.1	7,462.3	5,722.8	7,642.7	6,966.1	9,688.3
-- Tablets	2,342.0	3,249.1	3,511.5	2,364.0	1,854.1	2,520.7
Peripherals	1,143.4	1,426.9	1,041.3	1,647.0	2,116.9	2,975.8
- Monitors	521.8	554.7	347.1	403.1	487.8	657.2
- Printers	621.6	872.2	694.2	1,243.9	1,629.1	2,318.6
Computers and Peripherals	13,502.9	15,186.0	12,980.6	14,720.3	13,178.1	18,159.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth			
	2019/20	2015-20 CAGR	2015/20 Total
Computers	-6.6	-17.2	-61.1
- Desktops	-7.3	-18.3	-63.6
- Portable Computers	-6.5	-17.0	-60.6
-- Laptops	-3.1	-18.4	-63.8
-- Tablets	-9.0	-15.8	-57.8
Peripherals	-5.2	-5.4	-24.3
- Monitors	-7.1	-18.2	-63.3
- Printers	-4.9	-1.6	-7.6
Computers and Peripherals	-6.1	-13.5	-51.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth			
	2019/20	2015-20 CAGR	2015/20 Total
Computers	37.3	4.2	22.8
- Desktops	32.7	-0.2	-1.1
- Portable Computers	38.4	5.5	30.5
-- Laptops	39.1	6.7	38.2

-- Tablets	36.0	1.5	7.6
Peripherals	40.6	21.1	160.3
- Monitors	34.7	4.7	25.9
- Printers	42.3	30.1	273.0
Computers and Peripherals	37.8	6.1	34.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	1,244.2	1,009.0	1,136.2	975.7	890.4	883.7
- Desktops	622.3	513.1	721.3	618.1	562.0	541.3
- Portable Computers	621.9	495.9	414.9	357.6	328.4	342.4
-- Laptops	592.8	469.7	384.7	328.5	298.9	312.3
-- Tablets	29.0	26.2	30.2	29.1	29.5	30.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

ARS million	2015	2016	2017	2018	2019	2020
Computers	6,430.1	6,993.0	6,460.6	5,587.8	6,522.1	9,036.5
- Desktops	3,204.9	3,545.0	4,104.2	3,549.6	4,154.8	5,704.9
- Portable Computers	3,225.3	3,448.0	2,356.4	2,038.2	2,367.4	3,331.6
-- Laptops	3,141.3	3,348.0	2,237.9	1,921.5	2,239.4	3,142.5
-- Tablets	84.0	100.0	118.5	116.7	127.9	189.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.8	-6.6	-29.0
- Desktops	-3.7	-2.8	-13.0
- Portable Computers	4.3	-11.2	-44.9
-- Laptops	4.5	-12.0	-47.3
-- Tablets	2.1	0.7	3.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	38.6	7.0	40.5

- Desktops	37.3	12.2	78.0
- Portable Computers	40.7	0.7	3.3
-- Laptops	40.3	0.0	0.0
-- Tablets	47.9	17.6	125.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020
Convertible	16.0	22.0	26.8
Fixed	84.0	78.0	73.2
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	8.2	12.5	14.8	18.1	20.1	21.1
iOS	4.9	3.5	2.9	3.3	4.4	2.8
Android	86.9	84.0	82.3	78.6	75.5	76.1
BlackBerry OS	-	-	-	-	-	-
Other	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Hewlett-Packard Argentina SRL	15.8	17.0	23.4	25.8	25.1
Epson Argentina SA	8.5	7.2	9.1	12.4	13.6
Lenovo Argentina SA	6.3	5.9	7.7	8.4	9.0
Exo SA	0.5	1.3	2.5	2.7	3.1
Samsung Electronics Argentina SA	7.2	5.2	3.6	3.3	2.9
New San SA	6.5	6.8	2.6	2.0	1.8
Soluciones Integrales Corporativas SA	2.1	2.0	2.7	1.9	1.7
Acegame SA	3.1	3.5	1.9	2.0	1.6
Philips Argentina SA	0.5	0.4	0.6	1.1	1.4
Brother Inc Corp de Argentina Srl	1.8	2.0	1.9	1.5	1.4
Acer Argentina SA	5.6	4.8	2.4	1.5	1.4
LG Electronics Argentina SA	2.2	1.6	1.5	1.4	1.3
BGH SA	5.0	4.1	2.7	1.2	1.2

Dell America Latina Corp	1.0	0.9	1.0	1.0	1.0
PC Box SA	-	1.9	1.8	0.9	1.0
Apple Inc	1.4	1.3	1.2	1.3	0.8
PC Arts Argentina SA	1.9	1.3	0.8	0.6	0.4
AVH San Luis SA	-	-	1.5	0.4	0.3
Toshiba Corp	0.3	0.3	0.2	0.1	0.0
Frávega SA	0.2	0.1	0.0	0.0	-
Grupo Nucleo SA	2.8	2.4	2.0	-	-
Gularo SA	0.4	0.5	0.5	-	-
Bazar Avenida SA	0.5	0.5	0.5	-	-
Sony Argentina SA	0.5	0.3	0.3	-	-
Digital Fueguina SA	0.3	0.2	0.1	-	-
Corporate Corp SA	0.3	0.4	0.1	-	-
BenQ Argentina SRL	0.0	0.0	0.0	-	-
Coby Electronics Corp	0.4	0.0	0.0	-	-
Kodak Argentina SAIC	-	-	-	-	-
Canon Argentina SA	-	-	-	-	-
Private Label	0.9	0.8	15.2	13.7	13.9
Others	24.1	27.4	12.2	16.7	16.9
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard Argentina SRL	17.0	23.4	25.8	25.1
Epson (Seiko Epson Corp)	Epson Argentina SA	7.2	9.1	12.4	13.6
Lenovo (Lenovo Group Ltd)	Lenovo Argentina SA	5.9	7.7	8.4	9.0
Exo	Exo SA	1.3	2.5	2.7	3.1
Samsung (Samsung Corp)	Samsung Electronics Argentina SA	5.2	3.6	3.3	2.9
Asus (AsusTek Computer Inc)	Soluciones Integrales Corporativas SA	1.8	2.6	1.8	1.7
X-View	Acegame SA	3.5	1.9	2.0	1.6
Philips (Koninklijke Philips NV)	Philips Argentina SA	0.4	0.6	1.1	1.4
Brother (Brother Industries Ltd)	Brother Inc Corp de Argentina Srl	2.0	1.9	1.5	1.4
Acer (Acer Inc)	Acer Argentina SA	4.8	2.4	1.5	1.4
LG (LG Corp)	LG Electronics Argentina SA	1.6	1.5	1.4	1.3
Philco	New San SA	-	1.3	1.2	1.2
Positivo BGH (Informatica Fueguina SA)	BGH SA	3.2	2.2	1.2	1.2
Dell (Dell Technologies Inc)	Dell America Latina Corp	0.9	1.0	1.0	1.0
PCBOX	PC Box SA	1.9	1.8	0.9	1.0
iPad	Apple Inc	1.3	1.2	1.3	0.8
Noblex	New San SA	6.8	1.3	0.8	0.6
Banghó	PC Arts Argentina SA	1.3	0.8	0.6	0.4
AVH	AVH San Luis SA	-	1.5	0.4	0.3

Toshiba	Toshiba Corp	0.3	0.2	0.1	0.0
Olivetti (Olivetti SpA)	Soluciones Integrales Corporativas SA	0.2	0.1	0.0	-
Admiral	Frávega SA	0.1	0.0	0.0	-
Eurocase (Eurotechnologie Co Ltd)	Grupo Nucleo SA	2.4	2.0	-	-
Enova	BGH SA	0.9	0.5	-	-
Stromberg Carlson	Gularo SA	0.5	0.5	-	-
Assetech	Bazar Avenida SA	0.5	0.5	-	-
Sony (Sony Corp)	Sony Argentina SA	0.3	0.3	-	-
Commodore (Commodore International Corp (CIC))	Digital Fueguina SA	0.2	0.1	-	-
Ken Brown	Corporate Corp SA	0.4	0.1	-	-
Joybook (BenQ Corp)	BenQ Argentina SRL	0.0	0.0	-	-
Private label	Private Label	0.8	15.2	13.7	13.9
Others	Others	27.4	12.2	16.8	17.0
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	82.5	82.0	80.7	80.6	78.8	59.1
- Grocery Retailers	10.4	9.5	9.4	9.3	10.6	14.7
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	8.8	8.4	8.6	8.5	9.8	13.9
-- Supermarkets	1.6	1.1	0.9	0.9	0.8	0.9
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	61.6	62.1	62.4	64.3	63.3	41.3
-- Electronics and Appliance Specialist Retailers	59.6	58.7	59.6	59.4	58.3	38.0
-- Other Non-Grocery Specialists	2.0	3.4	2.8	4.9	4.9	3.3
- Mixed Retailers	10.5	10.4	8.9	6.9	5.0	3.0
Non-Store Retailing	17.5	18.0	19.3	19.4	21.2	40.9
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	17.5	18.0	19.3	19.4	21.2	40.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	688.5	596.0	525.4	470.6	426.6	392.5
- Desktops	102.3	90.0	78.1	68.2	60.3	53.4

- Portable Computers	586.2	506.0	447.3	402.4	366.3	339.1
-- Laptops	255.8	232.5	216.8	205.8	196.7	191.0
-- Tablets	330.4	273.5	230.5	196.6	169.6	148.1
Peripherals	468.2	445.5	424.4	403.9	384.1	365.2
- Monitors	68.4	59.2	51.9	45.6	40.1	35.4
- Printers	399.8	386.4	372.5	358.4	344.1	329.8
Computers and Peripherals	1,156.7	1,041.5	949.8	874.5	810.7	757.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

ARS million

	2020	2021	2022	2023	2024	2025
Computers	15,183.3	12,965.9	11,370.4	10,107.4	9,132.3	8,299.6
- Desktops	2,974.3	2,515.5	2,223.6	1,961.3	1,695.9	1,458.9
- Portable Computers	12,209.0	10,450.4	9,146.8	8,146.1	7,436.4	6,840.7
-- Laptops	9,688.3	8,347.0	7,359.9	6,626.0	6,131.4	5,729.6
-- Tablets	2,520.7	2,103.3	1,786.8	1,520.1	1,305.0	1,111.1
Peripherals	2,975.8	2,861.7	2,685.3	2,497.1	2,323.6	2,067.7
- Monitors	657.2	579.2	484.3	401.3	330.0	266.4
- Printers	2,318.6	2,282.5	2,201.1	2,095.8	1,993.6	1,801.3
Computers and Peripherals	18,159.1	15,827.6	14,055.7	12,604.6	11,455.9	10,367.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-13.4	-10.6	-43.0
- Desktops	-12.0	-12.2	-47.8
- Portable Computers	-13.7	-10.4	-42.2
-- Laptops	-9.1	-5.7	-25.3
-- Tablets	-17.2	-14.8	-55.2
Peripherals	-4.8	-4.8	-22.0
- Monitors	-13.5	-12.3	-48.2
- Printers	-3.4	-3.8	-17.5
Computers and Peripherals	-10.0	-8.1	-34.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-14.6	-11.4	-45.3
- Desktops	-15.4	-13.3	-51.0
- Portable Computers	-14.4	-10.9	-44.0
-- Laptops	-13.8	-10.0	-40.9

-- Tablets	-16.6	-15.1	-55.9
Peripherals	-3.8	-7.0	-30.5
- Monitors	-11.9	-16.5	-59.5
- Printers	-1.6	-4.9	-22.3
Computers and Peripherals	-12.8	-10.6	-42.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	883.7	872.9	858.6	842.6	826.1	818.3
- Desktops	541.3	522.9	504.0	484.5	464.5	444.1
- Portable Computers	342.4	350.0	354.6	358.0	361.5	374.2
-- Laptops	312.3	319.4	323.9	327.6	331.7	345.3
-- Tablets	30.1	30.6	30.7	30.5	29.9	29.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

ARS million	2020	2021	2022	2023	2024	2025
Computers	9,036.5	8,721.5	8,485.9	8,241.4	7,980.1	7,439.4
- Desktops	5,704.9	5,394.2	5,148.5	4,898.8	4,641.5	4,172.1
- Portable Computers	3,331.6	3,327.3	3,337.3	3,342.6	3,338.6	3,267.3
-- Laptops	3,142.5	3,136.9	3,146.9	3,159.3	3,167.0	3,113.4
-- Tablets	189.1	190.4	190.5	183.3	171.5	153.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-1.2	-1.5	-7.4
- Desktops	-3.4	-3.9	-18.0
- Portable Computers	2.2	1.8	9.3
-- Laptops	2.3	2.0	10.6
-- Tablets	1.6	-0.8	-3.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp	2020/21	2020-25 CAGR	2020/25 Total

Computers	-3.5	-3.8	-17.7
- Desktops	-5.4	-6.1	-26.9
- Portable Computers	-0.1	-0.4	-1.9
-- Laptops	-0.2	-0.2	-0.9
-- Tablets	0.6	-4.0	-18.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Convertible	26.8	30.3	32.5	34.9	36.5	38.1
Fixed	73.2	69.7	67.5	65.1	63.5	61.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume	2020	2021
Windows	21.1	22.4
iOS	2.8	1.5
Android	76.1	76.1
BlackBerry OS	-	-
Other	-	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



Passport

Computers and Peripherals in Chile

Euromonitor International

October 2020

LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Protests and pricing as factors in e-commerce growth	1
Increasing focus on products suited to home use during travel restrictions and lockdowns	1
Stay-at-home use was already A key factor in category sales before the arrival of the pandemic	1
RECOVERY AND OPPORTUNITIES	2
Blurring the boundaries between laptops and tablets	2
Cloud services to expand revenues.....	2
Entertainment rises and sales driver.....	2
CATEGORY DATA.....	2
Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020	2
Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020	3
Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020	3
Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020	3
Table 5 Sales of Computers by Category: Business Volume 2015-2020	3
Table 6 Sales of Computers by Category: Business Value MSP 2015-2020	4
Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020	4
Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020	4
Table 9 Sales of Laptops by Form Factor 2018-2020	4
Table 10 Sales of Tablets by Operating System 2015-2020	5
Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020	5
Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020	6
Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020	6
Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025	7
Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025	7
Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025	8
Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025	8
Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025	8
Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025	8
Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025	9
Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025	9
Table 22 Forecast Sales of Laptops by Form Factor 2020-2025	9

Table 23	Forecast Sales of Tablets by Operating System 2020-2021	9

COMPUTERS AND PERIPHERALS IN CHILE

KEY DATA FINDINGS

- The movement towards home working and learning due to COVID-19 – and previously the social unrest – is helping slow the decline in computers and peripherals sales in 2020
- Computer and peripherals declines by 6% in retail volume terms to 2.1 million units in 2020
- Laptops records the slowest retail volume decline of 3% in 2020
- Hewlett-Packard Chile leads computers and peripherals with a 29% volume share in 2020
- Computers and peripherals to record a negative retail volume CAGR of 3% over the forecast period, falling to 1.8 million units in 2025

2020 IMPACT

Protests and pricing as factors in e-commerce growth

The protests that were affecting Chile in the final quarter of 2019 were already increasingly turning consumers towards an in-home environment, even before the COVID-19 pandemic arrived in Chile, increasing the importance of e-commerce and especially of the now traditional online sales events such as Cyber Monday and Black Friday, which are key dates for the sales of computer and peripherals. Chileans wait for these dates, as prices are cut and become more accessible for them, especially considering the increasing prices of laptops, due to the rise in the dollar exchange rate and the higher price of solid-state drive (SSD) laptops.

Increasing focus on products suited to home use during travel restrictions and lockdowns

Diversification in the types of activities performed by consumers makes them prefer laptops that can perform different activities and interact with multiple devices such as their smart TVs and smartphones without any major limits. Battery and hardware performance are also increasingly attractive for consumers in this same context. Multifunctionality, wireless connectivity and toner efficiency are the current standard product offering characteristics in printers in Chile. Product launches have been focusing on home activities, such as Epson's EcoTank line and HP's Neverstop Laser line, which fulfil these characteristics along with having easy operating interfaces, which could prove to be competitive advantages in what is a declining category that has been seeing fewer purchasing occasions due to movement restrictions and lockdowns.

Stay-at-home use was already A key factor in category sales before the arrival of the pandemic

The closure of communal working and learning spaces during the social unrest and then the COVID-19 pandemic and the rise in the work-from-home and home-schooling trends has increased the importance of this category in the context of remote working and learning activities. While companies and workers have been needing to set up online work operations, consumers have had to deal with rising import prices, currency devaluation and falling household income, seeing the overall category selling fewer products and consumers opting for

economy and cost-efficient products and brands. In terms of activities moving into the home, Chile was actually ahead of its time, with the social unrest in late 2019 seeing students and workers moving away from traditional communal working and learning spaces into their own home offices or educational stations.

RECOVERY AND OPPORTUNITIES

Blurring the boundaries between laptops and tablets

The laptop offering is adapting to the rising prices and consumer demand for performance. Companies are focusing their attention on 2-in-1 laptops, devices that can detach the screen from the keyboard, thereby turning it into a tablet. Lenovo's Yoga line, the Acer Spin line and Apple's aim to turn high-performance iPads into buyers' next laptop show how companies are likely to struggle for differentiation, with price being one of the most important purchasing decision factors.

Cloud services to expand revenues

Printer companies started to enable cloud and printer enhancing services to complement hardware capabilities and embrace the digitalisation trend. Service offerings such as Lexmark's Cloud Services, Xerox's partnership with Apple AirPrint and Google Cloud Print, and Ricoh's DocuWare acquisition provide a glimpse into the competitive drivers that might migrate from a B2B to a B2C environment, given the decreasing unit sales trend.

Entertainment rises and sales driver

Gaming laptops represents one of the most competitive areas within computer and peripherals, being a focus of innovation and a very important niche in Chile, especially during the transition of activities into an indoor environment and in times of social distancing. This category, which accounts for around 20% of HP's laptop business in Chile, is helping to slow the decline in the overall sales of laptops in 2020.

CATEGORY DATA

Table 1 Sales of Computers and Peripherals by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers	2,067.3	1,949.7	1,725.4	1,594.5	1,512.4	1,430.4
- Desktops	126.8	122.3	117.9	116.9	110.9	104.0
- Portable Computers	1,940.5	1,827.3	1,607.5	1,477.5	1,401.4	1,326.4
-- Laptops	954.0	945.2	915.9	865.8	894.8	871.9
-- Tablets	986.6	882.1	691.6	611.8	506.6	454.5
Peripherals	781.7	766.3	754.1	779.3	716.6	673.4
- Monitors	185.6	187.5	176.2	189.3	179.6	172.9
- Printers	596.1	578.7	578.0	590.0	537.0	500.5
Computers and Peripherals	2,849.0	2,715.9	2,479.6	2,373.8	2,229.0	2,103.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Computers and Peripherals by Category: Value 2015-2020

CLP million	2015	2016	2017	2018	2019	2020
Computers	503,802.2	501,995.3	482,022.4	468,341.7	482,791.6	480,884.0
- Desktops	47,804.6	48,020.5	48,640.1	48,185.4	45,988.7	43,314.9
- Portable Computers	455,997.7	453,974.9	433,382.3	420,156.3	436,803.0	437,569.1
-- Laptops	353,334.7	365,122.9	365,185.2	357,430.4	382,860.5	387,264.9
-- Tablets	102,663.0	88,852.0	68,197.1	62,726.0	53,942.5	50,304.2
Peripherals	67,066.1	67,309.1	67,372.8	72,213.0	70,753.3	70,761.6
- Monitors	16,211.4	16,792.3	16,123.0	17,817.5	17,609.3	17,653.7
- Printers	50,854.7	50,516.8	51,249.8	54,395.6	53,144.0	53,107.9
Computers and Peripherals	570,868.4	569,304.4	549,395.2	540,554.7	553,545.0	551,645.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Computers and Peripherals by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-5.4	-7.1	-30.8
- Desktops	-6.3	-3.9	-18.0
- Portable Computers	-5.4	-7.3	-31.6
-- Laptops	-2.6	-1.8	-8.6
-- Tablets	-10.3	-14.4	-53.9
Peripherals	-6.0	-2.9	-13.9
- Monitors	-3.7	-1.4	-6.8
- Printers	-6.8	-3.4	-16.0
Computers and Peripherals	-5.6	-5.9	-26.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Computers and Peripherals by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	-0.4	-0.9	-4.5
- Desktops	-5.8	-2.0	-9.4
- Portable Computers	0.2	-0.8	-4.0
-- Laptops	1.2	1.9	9.6
-- Tablets	-6.7	-13.3	-51.0
Peripherals	0.0	1.1	5.5
- Monitors	0.3	1.7	8.9
- Printers	-0.1	0.9	4.4
Computers and Peripherals	-0.3	-0.7	-3.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Computers by Category: Business Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020

Computers	587.8	595.6	602.8	609.3	578.0	595.2
- Desktops	226.6	227.6	228.5	229.3	174.2	173.3
- Portable Computers	361.2	368.0	374.3	380.0	403.8	421.9
-- Laptops	309.1	315.1	320.7	325.7	342.6	357.1
-- Tablets	52.1	52.9	53.6	54.3	61.2	64.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Computers by Category: Business Value MSP 2015-2020

CLP million	2015	2016	2017	2018	2019	2020
Computers	228,769.7	241,130.6	251,033.6	258,078.8	247,011.1	258,358.9
- Desktops	90,683.0	94,725.3	97,546.1	98,901.2	75,894.4	76,437.9
- Portable Computers	138,086.6	146,405.3	153,487.6	159,177.6	171,116.8	181,921.0
-- Laptops	130,307.4	138,401.2	145,254.6	150,737.2	161,486.4	171,536.5
-- Tablets	7,779.2	8,004.1	8,232.9	8,440.4	9,630.4	10,384.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Computers by Category: Business Volume Growth 2015-2020

% business volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers	3.0	0.3	1.3
- Desktops	-0.5	-5.2	-23.5
- Portable Computers	4.5	3.2	16.8
-- Laptops	4.2	2.9	15.5
-- Tablets	5.9	4.5	24.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Computers by Category: Business Value MSP Growth 2015-2020

% current business value growth msp	2019/20	2015-20 CAGR	2015/20 Total
Computers	4.6	2.5	12.9
- Desktops	0.7	-3.4	-15.7
- Portable Computers	6.3	5.7	31.7
-- Laptops	6.2	5.7	31.6
-- Tablets	7.8	5.9	33.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Laptops by Form Factor 2018-2020

% retail volume	2018	2019	2020

Convertible	13.0	14.3	15.9
Fixed	87.0	85.7	84.1
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Tablets by Operating System 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Windows	22.2	24.6	22.6	19.9	18.1	18.8
iOS	7.7	6.3	8.6	10.9	13.1	12.1
Android	70.1	68.3	68.9	69.3	68.8	69.0
BlackBerry OS	-	-	-	-	-	-
Other	-	0.7	0.0	0.0	0.0	0.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Computers and Peripherals: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
Hewlett-Packard Chile CL	27.2	29.1	27.9	28.5	28.7
Lenovo Chile	8.9	12.0	13.6	13.5	13.6
Samsung Electronics Chile Ltda	10.2	10.1	8.7	8.8	8.8
Net Now Tecnología y Computación SA	10.2	5.6	7.2	7.4	7.5
Epson Chile SA	4.5	5.4	6.2	5.8	5.7
Thermaltake Chile Ltda	0.8	0.9	2.0	4.6	4.9
Dell Computer de Chile Ltda	2.0	2.2	3.4	4.6	4.9
Quintec SA	4.2	4.8	5.6	4.7	4.3
Brother International de Chile Ltda	2.3	2.7	3.5	3.6	3.6
Canon Chile SA	2.9	3.4	4.2	2.9	2.9
Importadora y Exportadora HJ Ltda	3.2	2.6	3.5	3.0	2.8
Huawei Chile SA	0.3	0.2	1.5	2.8	2.7
LG Electronics Chile	2.1	2.0	1.8	1.7	1.8
Intcomex SA	0.5	0.4	0.5	0.6	0.6
Envision SA	1.2	0.6	0.5	0.2	0.3
AD Retail SA	1.7	0.4	2.2	0.2	0.2
Gasei SA	3.1	2.7	1.9	0.1	0.1
Toshiba America Inc	0.5	-	-	-	-
Sony Chile Ltda	-	-	-	-	-
Olidata Chile SA	-	-	-	-	-
Others	14.3	15.0	5.9	7.1	6.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Computers and Peripherals: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
HP (HP Inc)	Hewlett-Packard Chile CL	28.7	27.8	28.0	28.2
Lenovo (Lenovo Group Ltd)	Lenovo Chile	12.0	13.6	13.5	13.6
Samsung (Samsung Corp)	Samsung Electronics Chile Ltda	10.1	8.7	8.8	8.8
Acer (Acer Inc)	Net Now Tecnología y Computación SA	5.4	7.1	7.4	7.5
Epson (Seiko Epson Corp)	Epson Chile SA	5.4	6.2	5.8	5.7
Asus (AsusTek Computer Inc)	Thermaltake Chile Ltda	0.9	2.0	4.6	4.9
Dell (Dell Technologies Inc)	Dell Computer de Chile Ltda	2.2	3.4	4.6	4.9
Brother (Brother Industries Ltd)	Brother International de Chile Ltda	2.7	3.5	3.6	3.6
Canon (Canon Inc)	Canon Chile SA	3.4	4.2	2.9	2.9
Microlab	Importadora y Exportadora HJ Ltda	2.6	3.5	3.0	2.8
Huawei (Huawei Technologies Co Ltd)	Huawei Chile SA	0.2	1.5	2.8	2.7
iPad (Apple Inc)	Quintec SA	2.4	2.8	3.0	2.6
LG (LG Corp)	LG Electronics Chile	2.0	1.8	1.7	1.8
MacBook (Apple Inc)	Quintec SA	2.2	2.5	1.5	1.5
Viewsonic (ViewSonic Corp)	Intcomex SA	0.4	0.5	0.6	0.6
Samsung (HP Inc)	Hewlett-Packard Chile CL	0.4	0.1	0.5	0.5
AOC (TPV Technology Ltd)	Envision SA	0.6	0.5	0.2	0.3
Kioto	AD Retail SA	0.4	2.2	0.2	0.2
Mac (Apple Inc)	Quintec SA	0.2	0.2	0.2	0.2
Master-G	Gasei SA	2.7	1.9	0.1	0.1
Packard Bell (Acer Inc)	Net Now Tecnología y Computación SA	0.2	0.1	-	-
Dell (Dell Inc)	Dell Computer de Chile Ltda	-	-	-	-
Compaq (Hewlett-Packard Development Co LP)	Hewlett-Packard Chile CL	-	-	-	-
HP (Hewlett-Packard Development Co LP)	Hewlett-Packard Chile CL	-	-	-	-
Olidata (Olidata SpA)	Olidata Chile SA	-	-	-	-
Sony Vaio (Sony Corp)	Sony Chile Ltda	-	-	-	-
Vaio (Vaio Corp)	Sony Chile Ltda	-	-	-	-
Toshiba (Toshiba Corp)	Toshiba America Inc	-	-	-	-
Others	Others	15.0	5.9	7.1	6.6
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Computers and Peripherals by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020

Store-Based Retailing	87.2	86.3	85.7	85.1	84.5	83.9
- Grocery Retailers	6.2	6.6	7.0	6.8	5.2	4.9
-- Discounters	-	-	-	-	-	-
-- Hypermarkets	6.2	6.6	7.0	6.8	5.2	4.9
-- Supermarkets	-	-	-	-	-	-
-- Other Grocery Retailers	-	-	-	-	-	-
- Non-Grocery Specialists	28.4	26.3	25.7	25.9	24.9	23.1
-- Electronics and Appliance Specialist Retailers	15.9	14.1	15.8	17.1	18.0	18.4
-- Other Non-Grocery Specialists	12.6	12.2	9.9	8.8	6.9	4.6
- Mixed Retailers	52.5	53.5	53.0	52.4	54.3	55.9
Non-Store Retailing	12.8	13.7	14.3	14.9	15.5	16.1
- Direct Selling	-	-	-	-	-	-
- Homeshopping	-	-	-	-	-	-
- E-Commerce	12.8	13.7	14.3	14.9	15.5	16.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Computers and Peripherals by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	1,430.4	1,379.0	1,333.7	1,293.9	1,257.2	1,224.7
- Desktops	104.0	100.3	98.0	96.2	94.5	92.9
- Portable Computers	1,326.4	1,278.7	1,235.7	1,197.7	1,162.7	1,131.8
-- Laptops	871.9	851.5	833.2	816.5	800.6	787.0
-- Tablets	454.5	427.2	402.5	381.3	362.1	344.8
Peripherals	673.4	653.1	634.8	616.6	601.9	590.5
- Monitors	172.9	168.2	164.1	160.4	157.1	154.2
- Printers	500.5	484.9	470.8	456.2	444.8	436.3
Computers and Peripherals	2,103.8	2,032.1	1,968.5	1,910.5	1,859.1	1,815.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Computers and Peripherals by Category: Value 2020-2025

CLP million	2020	2021	2022	2023	2024	2025
Computers	480,884.0	470,815.7	460,987.7	451,911.2	443,188.5	435,561.0
- Desktops	43,314.9	41,951.6	40,121.5	38,507.6	37,073.3	35,808.9
- Portable Computers	437,569.1	428,864.0	420,866.2	413,403.6	406,115.2	399,752.1
-- Laptops	387,264.9	381,304.2	375,867.1	370,669.4	365,477.5	361,060.7
-- Tablets	50,304.2	47,559.9	44,999.1	42,734.2	40,637.7	38,691.3
Peripherals	70,761.6	70,931.4	70,944.8	70,795.9	70,579.9	70,290.0
- Monitors	17,653.7	17,362.5	17,030.2	16,723.8	16,436.1	16,165.8
- Printers	53,107.9	53,568.9	53,914.5	54,072.1	54,143.7	54,124.2
Computers and Peripherals	551,645.7	541,747.1	531,932.5	522,707.1	513,768.4	505,850.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Computers	-3.6	-3.1	-14.4
- Desktops	-3.6	-2.2	-10.7
- Portable Computers	-3.6	-3.1	-14.7
-- Laptops	-2.3	-2.0	-9.7
-- Tablets	-6.0	-5.4	-24.1
Peripherals	-3.0	-2.6	-12.3
- Monitors	-2.7	-2.3	-10.8
- Printers	-3.1	-2.7	-12.8
Computers and Peripherals	-3.4	-2.9	-13.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Computers and Peripherals by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Computers	-2.1	-2.0	-9.4
- Desktops	-3.1	-3.7	-17.3
- Portable Computers	-2.0	-1.8	-8.6
-- Laptops	-1.5	-1.4	-6.8
-- Tablets	-5.5	-5.1	-23.1
Peripherals	0.2	-0.1	-0.7
- Monitors	-1.6	-1.7	-8.4
- Printers	0.9	0.4	1.9
Computers and Peripherals	-1.8	-1.7	-8.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Computers by Category: Business Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Computers	595.2	595.5	606.1	612.7	616.4	621.2
- Desktops	173.3	159.4	156.9	155.9	154.0	156.8
- Portable Computers	421.9	436.1	449.2	456.8	462.4	464.4
-- Laptops	357.1	368.3	378.9	384.8	389.5	391.2
-- Tablets	64.8	67.9	70.3	72.0	72.9	73.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Computers by Category: Business Value MSP 2020-2025

CLP million

	2020	2021	2022	2023	2024	2025
Computers	258,358.9	254,254.2	254,439.7	253,124.4	251,614.1	250,221.0
- Desktops	76,437.9	69,061.2	66,761.9	65,771.9	64,683.6	65,833.6
- Portable Computers	181,921.0	185,193.0	187,677.8	187,352.6	186,930.5	184,387.3
-- Laptops	171,536.5	174,402.7	176,578.1	176,121.4	175,685.1	173,250.7
-- Tablets	10,384.5	10,790.3	11,099.7	11,231.2	11,245.4	11,136.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Computers by Category: Business Volume Growth 2020-2025

% business volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Computers	0.0	0.9	4.4
- Desktops	-8.0	-2.0	-9.5
- Portable Computers	3.4	1.9	10.1
-- Laptops	3.1	1.8	9.5
-- Tablets	4.8	2.5	12.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Computers by Category: Business Value MSP Growth 2020-2025

% constant business value growth msp

	2020/21	2020-25 CAGR	2020/25 Total
Computers	-1.6	-0.6	-3.1
- Desktops	-9.7	-2.9	-13.9
- Portable Computers	1.8	0.3	1.4
-- Laptops	1.7	0.2	1.0
-- Tablets	3.9	1.4	7.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Laptops by Form Factor 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Convertible	15.9	15.9	17.1	18.2	19.0	19.2
Fixed	84.1	84.1	82.9	81.8	81.0	80.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Tablets by Operating System 2020-2021

% retail volume

2020	2021

Windows	18.8	17.9
iOS	12.1	12.3
Android	69.0	69.8
BlackBerry OS	-	-
Other	0.1	-
Total	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



ANEXO 2: LIMITACIONES EN LA PRODUCCIÓN DE PROCESADORES

INVESTING

JP Morgan says Intel's chip shortage is 'worsening' and will hurt fourth-quarter PC sales by up to 7%

PUBLISHED FRI, SEP 14 2018•10:19 AM EDT UPDATED FRI, SEP 14 2018•4:12 PM EDT



Tae Kim
@FIRSTADOPTER

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KEY POINTS

J.P. Morgan believes the processor shortage for Intel chips will significantly impact PC industry sales later this year.

“Our conversations with PC vendors indicate that the shortage, which started in small magnitude in 3Q, has been progressively worsening and is likely to have the maximum impact in 4Q18,” the firm’s Asia Pacific technology analyst Gokul Hariharan says.



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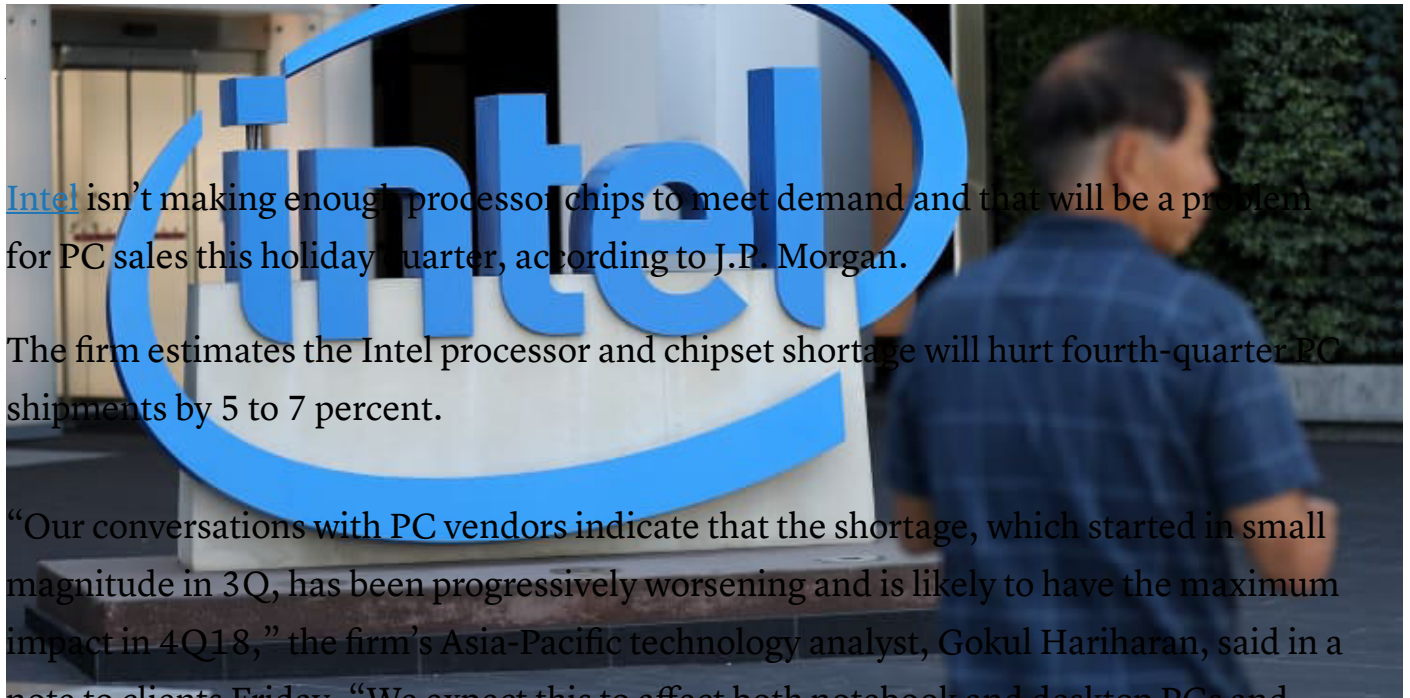
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WATCHLIST



MENU



[Intel](#) isn't making enough processor chips to meet demand and that will be a problem for PC sales this holiday quarter, according to J.P. Morgan.

The firm estimates the Intel processor and chipset shortage will hurt fourth-quarter PC shipments by 5 to 7 percent.

“Our conversations with PC vendors indicate that the shortage, which started in small magnitude in 3Q, has been progressively worsening and is likely to have the maximum impact in 4Q18,” the firm’s Asia-Pacific technology analyst, Gokul Hariharan, said in a note to clients Friday. “We expect this to affect both notebook and desktop PCs and likely to have a higher impact on commercial and high-end consumer PCs, where using [AMD](#) or older Intel family of CPUs as substitutes are more difficult.”



VIDEO 08:54

These are the winners and losers in the chip space, technician says



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manufacturing capacity to the 10 nanometer process. Unfortunately the chipmaker has announced a delay in moving its next-generation manufacturing technology to holiday 2019, which may be crimping overall chip production, according to Hariharan.

One nanometer equals one-billionth of a meter. Smaller nanometer chipmaking technologies historically have allowed companies to create faster, more power-efficient chips.

The analyst said Intel's manufacturing issues will likely benefit its primary competitor in PC processors. AMD expects to launch its 7 nanometer processor chips next year.

“We see rising interests in AMD adoption in the next cycle from PC OEMs given recent Intel CPU supply concerns,” he said.

In July, technology research firm IDC [reported second-quarter global PC](#) shipments rose 2.7 percent year over year, which marked the highest quarterly growth rate in more than six years.

Intel shares are down 1.3 percent this year through Thursday, while AMD's stock is up nearly 200 percent in the same time period.

Asian media outlet Digitimes reported the Intel chip supply and manufacturing issues on Aug. 31, which is now corroborated by J.P. Morgan's research.

When asked for comment on the J.P. Morgan report, Intel sent this statement:

“Customer demand has continued to improve over the course of the year, fueling growth in every segment of Intel's business and raising our 2018 revenue outlook \$4.5 billion from our January expectations. We will have supply to meet our announced, full-year revenue outlook and we're working closely with our customers and factories to manage any additional upside.”

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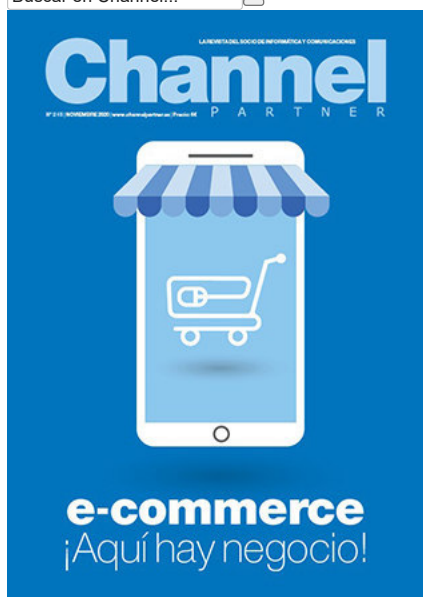
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[Noticias](#)

Siguen los problemas para satisfacer la demanda de chips

[Fabricantes](#)

Intel disfruta de una buena situación financiera, aunque su tic-tac tecnológico se ha parado. Desde hace un lustro no avanza en su proceso de fabricación y en los últimos tiempos está teniendo problemas para satisfacer la demanda creciente de chips, sobre todo los de gama baja para PC. Desde la compañía dicen que la situación se normalizará durante este año

Juan Cabrera
14 enero 2019



Operario en una de las fábricas de Intel.

Desde hace unos meses, el canal de Intel vive en una cierta incertidumbre. A finales del verano saltaron los primeros avisos de alarma. En esas fechas, **JP Morgan apuntaba a problemas de escasez en la producción de chips del gigante de Silicon Valley**, sobre todo de CPU para ordenadores, y avisaba de que si se mantenían estos problemas, las ventas de equipos en la temporada de Black Friday y Navidad se podrían resentir hasta un 7%. Aunque a fecha de hoy este extremo no está confirmado.

Al poco tiempo, el CEO interino de Intel, Bob Swan, que también es director financiero, [mandó una carta a clientes y partners en la que aseguraba que la compañía estaba en disposición de garantizar el suministro](#). Sin embargo, los meses han pasado y los problemas permanecen. Según informaciones de Digitimes.com, la industria taiwanesa de componentes para PC esperaba a principios de noviembre una caída de las ventas de un 10% debido a los problemas de producción de Intel.

En España, y según datos de IDC a los que ha tenido acceso CHANNEL PARTNER, fabricantes y mayoristas **adelantaron al verano muchas de las compras de la segunda parte del año** para neutralizar en la medida de lo posible el problema de desabastecimiento de ciertas configuraciones. Además, [acaban de publicarse los datos de ventas mundiales de PC en el último trimestre del año](#), que han registrado una caída de algo más del 4% con respecto al mismo periodo de 2017, rompiendo una tendencia de un semestre al alza, y las grades consultoras, como IDC y Gartner han vuelto a mencionar los problemas de suministro en el mundo de los chips como uno de los causantes del descenso.

Javier Galiana, de Intel, recuerda que hay un compromiso para tener chips de 10 nanómetros en la Navidad de 2019

Las dificultades por las que pasa Intel han coincidido en el tiempo con un repunte de la demanda de ordenadores en todo el mundo, y los portavoces de la compañía siempre han aludido a este crecimiento para justificar su incapacidad para servir CPU al ritmo previsto. **Javier Galiana, director para EMEA del mercado de consumo de Intel**, también explica CHANNEL PARTNER que una demanda por encima de las expectativas, tanto de procesadores para PC como para centros de datos, va a hacer “difícil” que la compañía atienda todos los pedidos. Y admite que habrá dificultades en la gama baja. “Estamos priorizando la producción de nuestros procesadores Xeon y Core para que nuestros clientes puedan servir los segmentos de alto rendimiento, por lo que pensamos que las principales dificultades estarán en la gama de entrada”.

Un tema que viene de lejos

Sin embargo, la historia es compleja y se extiende en el tiempo. Hasta 2014, todo iba a pedir de boca para Intel. Hasta ese momento, la compañía seguía estrictamente su **famoso tic-tac**, que decía que un año tocaba un cambio de arquitectura y al siguiente se producía un cambio en el proceso de fabricación. En 2014 apareció la quinta generación de procesadores Core con reglas de diseño de 14 nanómetros. Sin embargo, a partir de esa generación, denominada Skylake, el armonioso paso de Intel se detuvo.

En las siguientes tres generaciones el fabricante fue incapaz de dar el paso a los 10 nanómetros, con lo que, en líneas generales, ya lleva un lustro con la misma tecnología. De todas formas, Javier Galiana defiende que la compañía no ha estado con los brazos cruzados. “Mientras nos hemos estado enfocando en superar los retos que nos ha supuesto el proceso de fabricación en 10 nanómetros, hemos ido ajustando y optimizando las microarquitecturas y los procesos de fabricación en 14 nanómetros, sacando una nueva generación de procesadores Intel Core cada año, las cuales han ido mejorando en prestaciones y rendimiento con cada una de ellas, lo que nos ha permitido mantener un buen ritmo de ventas de PC y expandir nuestros ne-gocios a nuevas áreas como el 5G, la conducción autónoma, la inteligencia artificial y el Internet de las cosas”.

El salto esperado a los 10 nm

En cualquier caso, los analistas especulan con que el salto a los 10 nanómetros se producirá en algún momento de 2019 o 2020, pero no está claro ni cuándo ni cómo. Javier Galiana, de Intel, aclara que la compañía ya se ha comprometido públicamente para “tener equipos en las estanterías a tiempo para la temporada de Navidad de 2019”. En una rueda de prensa, [Norberto Mateos, primer ejecutivo de Intel en España, también insistió en que a finales de este año estarán disponibles los primeros procesador en 10 nanómetros para el canal OEM](#).

En los últimos tres años, la industria del PC ha seguido adelante sin poder ofrecer avances significativos en la parte en el corazón de sus equipos, y las novedades se han centrado en **el número de núcleos en ciertos modelos y en la frecuencia de trabajo**. Exteriormente, también han cambiado los formatos y los tamaños de las máquinas. En el mundo de los procesadores para servidor, el problema es parecido. Los primeros Xeon de 10 nanómetros deberían haber aparecido en 2016, y previsiblemente no estarán a la venta de forma masiva hasta 2020.

Nadie sabe a ciencia cierta cuáles son las causas que han originado el problema de la escasez actual. Podría ser un mal diseño de arquitectura o un error en alguna parte que ahora hace que el salto a la nueva generación de chips sea inviable o muy complicado. Además, el que Intel sea propietaria de las fábricas de las que salen sus chips hace que pueda controlar mejor sus procesos y la calidad de los mismos, pero también que se mueva más lentamente que competidores como AMD, que desde hace un tiempo hacen el diseño pero subcontratan la fabricación, y ya ha prometido que tendrá [procesadores de 10 e incluso 7 nanómetros para mediados de año](#).

Prioridad para los servidores

Manuel Lamarca es el responsable en España del Global Computing Com-ponents (GCC) de Tech Data, la unidad del mayorista encargada de la comercialización de componentes informáticos. Este directivo confirma que en el último trimestre de 2018 el suministro de chips de Intel se ha visto afectado y la demanda insatisfecha

supera el 20% de los pedidos. Eso sí, los problemas no son generalizados. Según Lamarca, **Intel está atendiendo debidamente la demanda en la parte de servidores**, donde, según los analistas, la demanda y los márgenes son superiores.

Por contra, los que están teniendo verdaderas dificultades son los fabricantes y distribuidores de PC, y sobre todo de equipos de gama baja. Lamarca dice que por el momento Intel no le ha comunicado oficialmente cuándo se va a normalizar la situación y toda la industria trabaja con las luces cortas, es decir, con previsiones que se revisan semana a semana. Tampoco ha comunicado Intel al canal cuándo aparecerán de forma masiva los chips de 10 nanómetros, a pesar de que todo indica que **no será, como pronto, hasta el próximo verano o, como dice Javier Galiana, para finales de 2019.**

La situación de Intel está siendo aprovechada por AMD, pero sólo hasta cierto punto. El eterno rival está ganando clientes en el área de portátiles y sobremesas de gama baja. Sin embargo, **Lamarca dice que el mercado no cambia “así como así”** y que en muchos proyectos se mantiene Intel por los pliegos de exigencias técnicas. En todo caso, hay analistas que vaticinan que AMD puede haber vendido en el último trimestre de 2018 hasta un 30% de los procesadores para sobremesa.

Buen balance económico

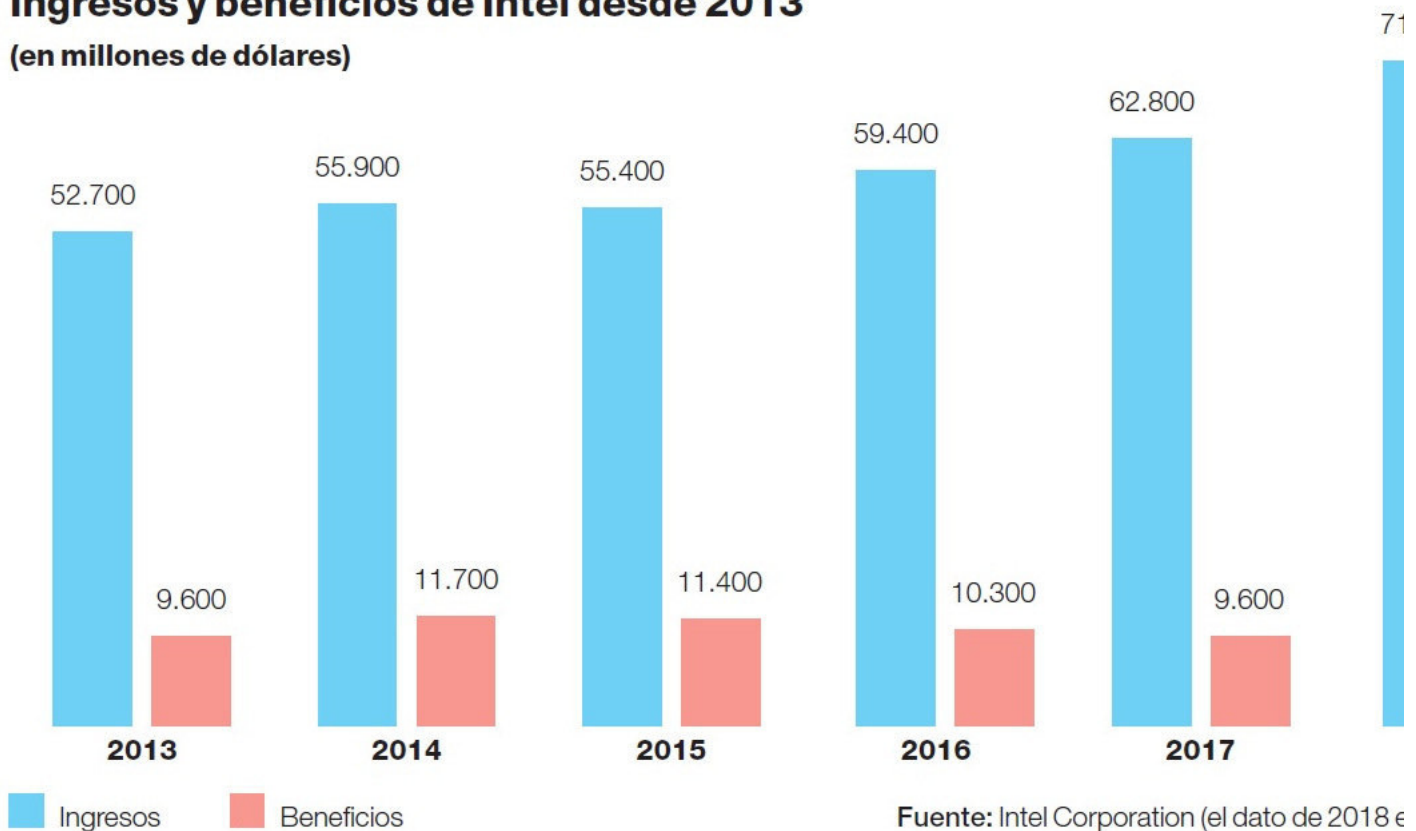
Curiosamente, los problemas de suministro y de roadmap de producto de Intel coinciden con una situación financiera muy boyante. Y es que la subida de las ventas de PC y servidores en todo el mundo tiran inmediatamente del negocio de la compañía estadounidense, que tiene cuotas en muchos segmentos de producto que rondan el 90%, lo que hace, además, que muchos fabricantes se vean abocados a comprarle sí o sí. En el tercer trimestre del año, **la compañía creció por encima de las previsiones debido precisamente al tirón de la demanda**, tanto en PC como en centro de datos.

A pesar de los problemas de abastecimiento, Intel espera que sus ventas crezcan un 13% en 2018

Intel llegó a los 19.200 millones de dólares de facturación en el tercer trimestre. **En PC las ventas repuntaron un 16%, un ritmo de avance alto si lo comparamos con la tónica de los últimos años**, y en servidores crecieron hasta un 22%. Además, a pesar de los problemas de abastecimiento, su acción ronda los 50 dólares, cuando hace 6 años, en los tiempos que cumplía rigurosamente con el tic-tac, estaba en la mitad. **La previsión de negocio para todo este 2018 es de nada menos que 71.200 millones de dólares, un 13% más que el año previo.** Es la brillante herencia financiera de Brian Krzanich, el CEO que tuvo que dimitir de forma repentina por una relación sentimental con una empleada.

Ingresos y beneficios de Intel desde 2013

(en millones de dólares)



Ingresos y ganancias de Intel en los últimos 5 años.

El CEO de Intel promete más inversión

En [una carta abierta firmada el 1 de octubre pasado](#), Bob Swan, el director financiero y CEO interino de Intel desde la salida de Brian Krzanich en junio, intentó tranquilizar a la industria y marcar las prioridades de la compañía. En ese texto Swan se congratulaba por el buen momento de los pedidos de procesadores para el centro de datos y también por el repunte “sorprendente” del PC, que por fin volvía crecer después de seis años a la baja, gracias sobre todo a la venta de los ordenadores para gaming y de los equipos para empresa.

Eso sí, el primer ejecutivo de Intel reconocía que **la compañía está priorizando la producción de los procesadores Xeon e Intel Core** y que el suministro en los meses siguientes iba a ser “ajustado, especialmente en el mercado de PC básicos”. En todo caso, y para para cumplir con las estimaciones de ingresos del año, revisadas al alza, el CEO también adelantaba una serie de acciones, como **invertir “una cifra record” de 15.000 millones de dólares en gastos de capital en 2018, 1.000 millones más de lo previsto.**

**TRENDING**

5950X Review

Rocket Lake

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RTX 3090

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AMD and Intel Issue CPU Supply Updates Amid Coronavirus Turmoil

By [Paul Alcorn](#) March 22, 2020

AMD and Intel reassure customers

[f](#) [t](#) [w](#) [d](#) [p](#) [e](#) [c](#) **Comments (0)**



(Image credit: Shutterstock)

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Nearly one in five Americans are now confined to their homes, not to mention other untold millions around the globe, as large swaths of the world engage in social distancing to stop the spread of COVID-19. That's putting an unprecedented strain on network infrastructure at every level, and that also equates to strain on servers used in the data center. That means that the supply of chips,

Along the backbone of the connected world, is incredibly pressing and we could see an increase in server and networking sales as the industry adjusts to handle the load.

Given the recent spate of chips shortages for both Intel and AMD, not to mention threats to their global supply chains, a sudden drop in chip supplies could exacerbate issues during what could be one of the most challenging times in recent history.

But according to AMD and Intel, which collectively power ~99% of the world's servers, both companies have adequate supply of processors and can meet the majority of demand, unlike [more than a few other companies](#).

Intel's Bob Swan [penned a letter reassuring the company's customers](#) earlier this week, citing the company's experienced Pandemic Leadership Team that it established 15 years ago and its globally-distributed supply and manufacturing chains as key reasons the company is operating at nearly full capacity and maintaining a 90% on-time delivery rate.

AMD CEO Lisa Su also penned a letter to customers last week, delivered via its Meet the Experts network, stating that the company is actively working to maintain business continuity by mitigating the impact on the company's global operations, and also taking steps to assure the safety of its employees during the outbreak.

Notably, neither chip maker has adjusted its earnings guidance provided during their respective releases last month.

There's plenty of evidence of increased internet usage. AT&T's CEO stated yesterday on CNN that the company has seen WiFi calling increase by 100% in the early days of the new restrictions, Steam broke its concurrent user record again yesterday, Zoom outage reports have become common, and OpenVault (an internet intelligence agency) says there's been a 41.4% rise in home internet usage. [Netflix and YouTube have throttled video quality](#) to lessen the burden on infrastructure, all while some [internet providers are loosening data caps](#) to give customers access to more data.

The sudden explosion of working and schooling from home presents a new series of challenges. For instance, contrary to widespread belief, there is no shortage of food in the U.S. – there isn't a sudden explosion in the number of people that need fed. Instead, a large amount of the food supply chain is dedicated to restaurants and the like, so a high percentage of food comes in bulk packaging that isn't suitable for retail sales. Fixing that problem merely involves switching production lines to different packaging techniques and diverting supply chains to focus more on supermarkets, an effort that is currently underway. But food production doesn't necessarily have to increase.

Likewise, there isn't a sudden increase in the population to drive increased internet usage, but the problem is more complex than that faced by the food industry. Remote working and schooling requires increased bandwidth for video ([good luck finding a webcam](#)), and resources for collaborative services like Zoom and Slack require a new level of compute that simply hasn't been needed before. The internet, and the innumerable services tied to it, are creaking under the strain. That means there will likely be an increased need for critical infrastructure, such as servers, particularly as the scope of shelter-in-place orders inevitably widens.

Infrastructure providers may take a conservative approach to expansion, lest they be left with massive amounts of unneeded hardware when the pandemic subsides. But there could be increased demand for server chips on the near horizon, and addressing increased demand could mean Intel and AMD might have to divert more production to server chips as opposed to client processors. That might not be too big of a concern, as some [analysts predict a sales decline of up to 30% for PCs](#).

We'll certainly need the critical supply of chips to continue flowing during the most severe pandemic in modern history.

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**TECH**

Laptop shortage threatens back-to-school plans as COVID-19 pandemic causes delays

Jocelyn Gecker and Michael Liedtke Associated Press

Published 2:14 p.m. ET Aug. 23, 2020 | Updated 3:49 p.m. ET Aug. 23, 2020

SAN FRANCISCO (AP) — Schools across the United States are facing shortages and long delays, of up to several months, in getting this year's most crucial back-to-school supplies: the laptops and other equipment needed for online learning, an Associated Press investigation has found.

The world's three biggest computer companies, Lenovo, HP and Dell, have told school districts they have a shortage of nearly 5 million laptops, in some cases exacerbated by Trump administration sanctions on Chinese suppliers, according to interviews with over two dozen U.S. schools, districts in 15 states, suppliers, computer companies and industry analysts.

As the school year begins virtually in many places because of the coronavirus, educators nationwide worry that computer shortfalls will compound the inequities — and the headaches for students, families and teachers.

“This is going to be like asking an artist to paint a picture without paint. You can't have a kid do distance learning without a computer,” said Tom Baumgarten, superintendent of the Morongo Unified School District in California's Mojave Desert, where all 8,000 students qualify for free lunch and most need computers for distance learning.

Baumgarten was set to order 5,000 Lenovo Chromebooks in July when his vendor called him off, saying Lenovos were getting “stopped by a government agency because of a component from China that's not allowed here,” he said. He switched to HPs and was told they would arrive in time for the first day of school Aug. 26. The delivery date then changed to September, then October. The district has about 4,000 old laptops that can serve roughly

half of students, but what about the rest, Baumgarten asks rhetorically. “I’m very concerned that I’m not going to be able to get everyone a computer.”

Peach recall expanded: Salmonella outbreak prompts recall of Prima Wawona peaches sold at Walmart, Target, Aldi

When will extra unemployment start?: Don't expect \$300 boost anytime soon, experts warn

Chromebooks and other low-cost PCs are the computers of choice for most budget-strapped schools. The delays started in the spring and intensified because of high demand and disruptions of supply chains, the same reasons that toilet paper and other pandemic necessities flew off shelves a few months ago. Then came the Trump administration’s July 20 announcement targeting Chinese companies it says were implicated in forced labor or other human rights abuses against a Muslim minority population, the Uighurs. The Commerce Department imposed sanctions on 11 Chinese companies, including the manufacturer of multiple models of Lenovo laptops, which the company says will add several weeks to existing delays, according to a letter Lenovo sent to customers.

School districts are pleading with the Trump administration to resolve the issue, saying that distance learning without laptops will amount to no learning for some of the country’s most vulnerable students.

“It’s a tough one because I’m not condoning child slave labor for computers, but can we not hurt more children in the process?” said Matt Bartenhagen, IT director for Williston Public Schools in North Dakota, a district of 4,600 waiting on an order for 2,000 Lenovo Chromebooks. “They were supposed to be delivered in July. Then August. Then late August. The current shipping estimate is ‘hopefully’ by the end of the year.

The Denver Public Schools district, the largest in Colorado, is waiting for 12,500 Lenovo Chromebooks ordered in April and May. The district has scrambled to find machines, settled for whatever is available and is handing out everything they get to students that need them. Still, when school starts Wednesday, they will be about 3,000 devices short, says Lara Hussain, an IT director for the district.

“We were promised devices. Our students need devices. And as a result of not receiving devices we will have students starting the school year unable to participate. It’s unconscionable,” said Hussain.

Lenovo had informed Denver and other districts over the spring and summer of supply chain delays. In late July, Lenovo sent a letter to customers to say the “trade controls” announced by the Commerce Department would cause another slowdown of at least several weeks.

“This delay is a new development and is unrelated to supply constraints previously communicated,” Matthew Zielinski, president of Lenovo North America said in the letter, which referred to the sanctions on a Chinese supplier, Hefei Bitland Information Technology Co. Ltd. The letter listed 23 Lenovo models for education and corporate customers made by Bitland.

“Effective immediately, we are no longer manufacturing these devices at Bitland,” the letter said, adding that Lenovo is working on “a transition plan” to shift production to other sites.

A Lenovo official told California’s Department of Education the company has a backlog of more than 3 million Chromebooks, said Daniel Thigpen, the department’s spokesman.

Lenovo declined to respond to repeated questions from AP seeking confirmation of the backlog and details on the numbers of devices delayed, replying only to deny a question on whether computers were seized by U.S. customs, as some schools were told by suppliers.

U.S. government agencies said they have no knowledge of the computers’ whereabouts and also deny any were seized.

“U.S. Customs and Border Protection does not have any record of detained laptops matching this description,” the agency said in a statement.

The Department of Commerce said it added Hefei Bitland to its so-called Entity List, which restricts the export and in-country transfer of items by sanctioned companies. “It does not apply to the importation of Chromebooks from China,” the department said in a statement, adding, however, “we should all agree that American school children should not be using computers from China that were produced from forced labor.”

There are no nationwide tallies on the numbers of laptops and other devices that schools are waiting for. The Associated Press found that some of America’s biggest school districts are among those with outstanding orders of Chromebooks, other laptops or hotspots for internet connections, including Los Angeles, Clark County, Nevada, Wake County, North Carolina, Houston, Palm Beach and Hawaii, the nation’s only statewide school district.

A recent poll of California’s 1,100 districts showed schools across the state are waiting on at least 300,000 backordered computers, said Mary Nicely, a senior policy advisor to the state

superintendent. A survey in Alabama found that about 20 schools were waiting on 33,000 computers, said Ryan Hollingsworth, director of the School Superintendents of Alabama.

Smaller districts in Montana, New York, Indiana, Maryland, Ohio, New Hampshire and elsewhere are also waiting on laptop orders, with delivery dates that have become moving targets.

Some of the school districts, like Los Angeles, say the outstanding orders are for replacement devices and all students who need a computer will have one. Many districts are asking parents with the means to buy devices for their children but realize that's not an option for many families.

It's also not an easy task with supplies at commercial stores running out. Best Buy's website shows 36 models of new and used Chromebooks priced under \$500, the low-cost models that are popular for students. As of this week, 33 of those models were sold out.

The backlog and delays have become so widespread that some students will be forced to start the semester without an essential piece of technology for remote learning, said Michael Flood, senior vice president of Kajeet, which works with more than 2,000 school districts in the U.S. and Canada.

Some school administrators told Flood their laptop and Chromebook suppliers hope deliveries will only be delayed by a month or so. But others are being told their machines may not be available until early 2021.

The shortage stems from exceptionally high demand at a time when the personal computer industry is still recovering from pandemic-driven precautions that shut down the factories of major PC suppliers in China during February and March. Just as the supply chain started ramping back up, new orders poured in from huge companies and government agencies with large numbers of employees working from home — in addition to school districts scrambling to secure machines, said Mikako Kitagawa, research director at Gartner Inc., which closely follows the PC industry.

"The bottom line is everyone seems to want a laptop or Chromebook right now and there just isn't enough supply of it," Kitagawa said. "It's a case of very bad timing."

To make matters worse, many school districts underestimated their needs during spring ordering, assuming that traditional in-person classes would resume in the fall.

In California, most schools were planning for some form of in-person classes in the fall but only learned in July that wouldn't be possible, when Gov. Gavin Newsom effectively ordered the majority of schools to start with remote learning. It created a mad dash for computers.

Tom Quiambao, director of technology for the Tracy Unified School District in Northern California, said he and his vendor contacted HP directly to ask why his July order for 10,000 HP laptops would take three months to be delivered. He was told, "HP is short 1.7 million units of laptops" because of production shortages in a variety of components made in China, including processors, touchscreens, motherboards and others, Quiambao said.

An HP spokeswoman declined to confirm or deny that number, saying only "we are continuing to leverage our global supply chain to meet the changing needs of our customer."

Dell offered a similarly brief response to detailed questions about a backlog.

"We can't comment on demand and supply specifically," Dell said in an emailed statement, adding the company was seeing increased orders due to virtual learning and trying "to fulfill orders as efficiently as possible."

With so many customers ordering laptops at the same time, PC manufacturers may be put in the uncomfortable position of deciding who gets them first, said Linn Huang, an analyst for the research firm International Data Corp. Those kind of pecking orders threaten to push small school districts to the back of the laptop line.

That's part of the problem for the central Texas district of Abilene, where they are waiting for 6,000 Dell Chromebooks, ordered in May and June but not expected until November.

"In Texas, there are over 1,200 school districts and they're all ordering," said district spokesman Lance Fleming. Schools are trying to get disinfecting supplies, too. "Who would have ever thought that computers and Clorox Wipes would be on the same level of need in our country."

Associated Press Writers Kathleen Foody in Chicago, Audrey McAvoy in Honolulu, Tali Arbel in New York contributed to this report.

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CPU and Panel Shortages Plague HP as Holiday Season Approaches

By [Ash Puckett](#) August 28, 2020

The laptop shortage of 2020 continues

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(Image credit: Shutterstock)



HP joins the growing list of PC companies facing a component shortage before the holiday season. As we previously reported, laptops and mobile devices are in high demand as workers and students make the switch to a virtual environment. PC manufacturers are struggling to meet the new demand while microelectronic suppliers are seeing a [surge in business](#), and that's having a ripple effect throughout the industry. That might make it hard to find any of the most in-demand models, like the ones on our list of [Best Gaming Laptops](#), this holiday season.

In the company's recent earnings call, HP CEO Enrique Lores and CFO Steve Fieler spoke about third-quarter metrics and [expectations for Q4](#) of 2020. According to Lores, the biggest delay is due to supply chain issues. More specifically, a CPU and panel shortage.

"We expect industry-wide CPU and panel constraints to negatively impact our ability to meet demand, especially for notebooks, which were constrained top-line growth," said Fieler ([via Seeking Alpha](#)).

While desktop sales dropped 29% last quarter, laptop and notebook sales accounted for a 7% total boost in quarterly sales. Workstation sales also dropped 30% in the previous quarter.

Fieler attributes the rise in notebook sales to the demand for assets like Chromebooks in educational environments. The work-from-home shift seems to have a direct correlation with the change in sales.

HP's Managed Print department also experienced a change in sales this quarter, with revenue dropping a total of 29% compared to 40% in April 2020.

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CEPAL

COVID-19
RESPUESTA

6 de agosto de 2020

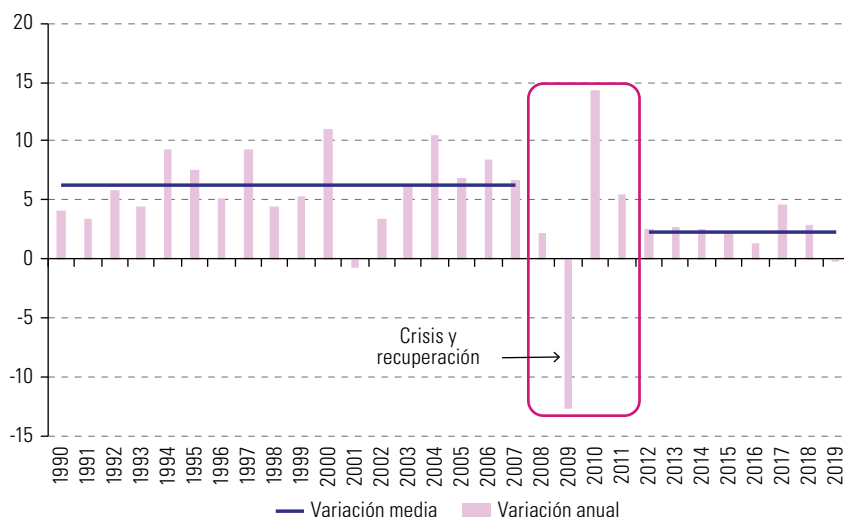
ANEXO 3: LIMITACIONES LOGÍSTICAS

Los efectos del COVID-19 en el comercio internacional y la logística

A. Se desploma el comercio mundial¹

■ **La irrupción del COVID-19 se produjo en un contexto de debilitamiento del comercio mundial que se arrastra desde la crisis financiera de 2008-2009.** Mientras que entre 1990 y 2007 el volumen del comercio de bienes se expandió a una tasa media del 6,2% anual, entre 2012 y 2019 lo hizo apenas a una del 2,3% anual (véase el gráfico 1). Asimismo, la participación de las exportaciones de bienes y servicios en el PIB mundial, que alcanzó su máximo histórico del 31% en 2008, desde 2015 se ha ubicado en torno al 28%.

Gráfico 1 | Tasa de variación del volumen del comercio mundial de bienes, 1990-2019
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de la Organización Mundial del Comercio (OMC).

Índice

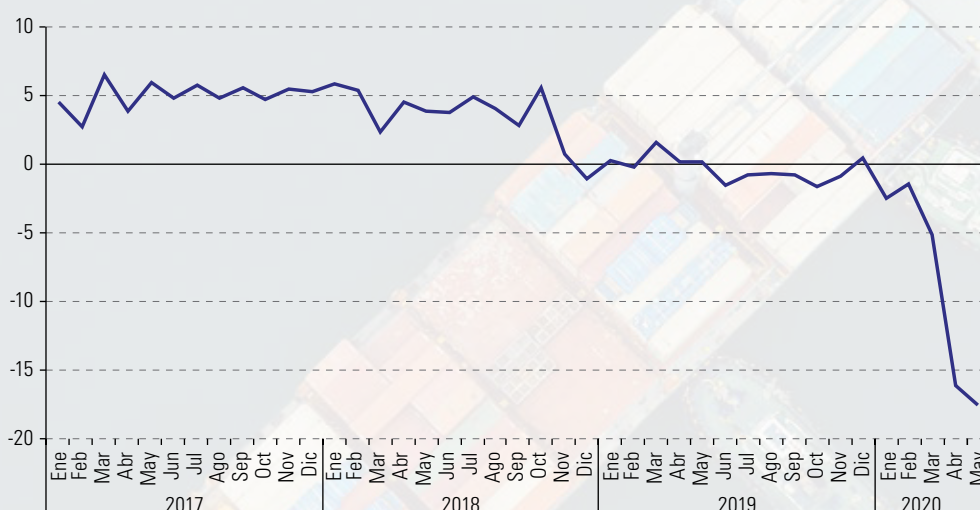
A. Se desploma el comercio mundial.....	1
B. El comercio de bienes de la región cayó un 17% entre enero y mayo de 2020.....	3
C. El colapso del turismo arrastra a las exportaciones de servicios.....	12
D. Los problemas en el transporte internacional traban el comercio regional.....	14
E. Las exportaciones y las importaciones de bienes se reducirían en una cuarta parte en 2020.....	18
F. Ante una economía mundial más incierta y regionalizada, es imperativo profundizar la integración regional.....	22
Bibliografía.....	23

¹ La información empleada para la elaboración de este documento, salvo que se indique otra cosa, es la disponible hasta el 17 de julio de 2020.

■ **La rápida propagación del COVID-19 y las medidas adoptadas por los gobiernos han tenido graves consecuencias en las principales economías mundiales.** Se ha interrumpido gran parte de las actividades productivas, primero en Asia y posteriormente en Europa, América del Norte y el resto del mundo, y ha habido cierres generalizados de fronteras. Esto ha dado lugar a un marcado aumento del desempleo, especialmente en los Estados Unidos, con la consecuente reducción de la demanda de bienes y servicios. En este contexto, **en 2020 el producto mundial registraría su mayor contracción desde la Segunda Guerra Mundial** (Banco Mundial, 2020).

■ **En esta coyuntura, en mayo de 2020 el volumen del comercio mundial de bienes cayó un 17,7% con respecto al mismo mes de 2019** (véase el gráfico 2). **La caída en los primeros cinco meses del año fue generalizada, si bien afectó especialmente a las exportaciones de los Estados Unidos, el Japón y la Unión Europea** (véase el cuadro 1). China experimentó una contracción menor que el promedio mundial, ya que controló el brote y reabrió su economía relativamente rápido. **América Latina y el Caribe es la región en desarrollo más afectada.**

Gráfico 2 | Variación interanual del volumen del comercio mundial de bienes, enero de 2017 a mayo de 2020
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base Netherlands Bureau for Economic Policy Analysis (CPB), World Trade Monitor [base de datos en línea] <https://www.cpb.nl/en/worldtrademonitor>.

Cuadro 1 | Mundo, agrupaciones y países seleccionados: variación del volumen del comercio mundial de bienes, diciembre de 2019 a mayo de 2020
(En porcentajes)

	Exportaciones	Importaciones
Mundo	-18,3	-15,8
Economías avanzadas	-22,7	-15,8
Estados Unidos	-30,8	-15,8
Japón	-22,1	-4,4
Zona del euro	-22,0	-16,6
Economías emergentes	-12,8	-15,8
China	-7,7	-13,8
Países emergentes de Asia (no incluye China)	-13,1	-17,2
Europa Oriental y Comunidad de Estados Independientes (CEI)	-4,4	-13,4
América Latina y el Caribe	-26,1	-27,4
África y Oriente Medio	-13,9	-2,5

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base Netherlands Bureau for Economic Policy Analysis (CPB), World Trade Monitor [base de datos en línea] <https://www.cpb.nl/en/worldtrademonitor>.

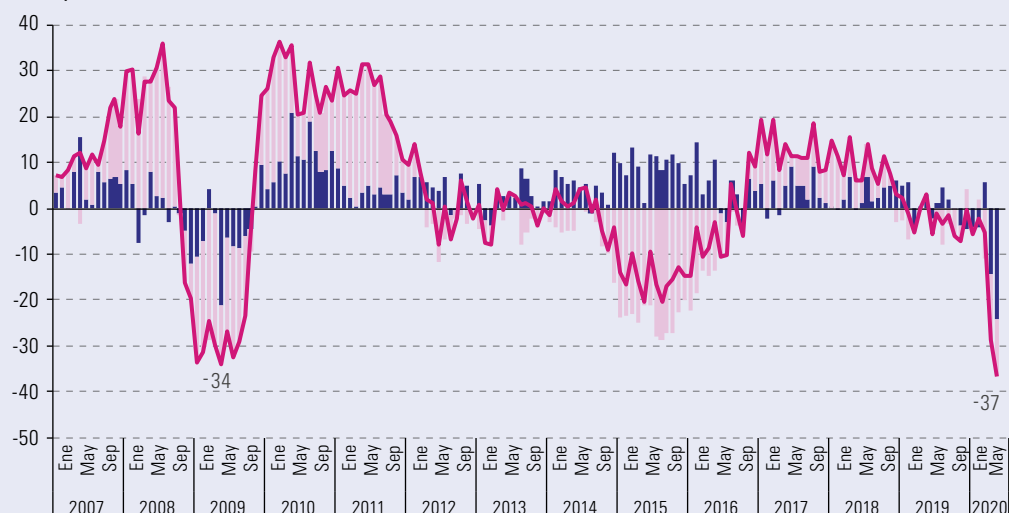
- **Las cadenas de valor mundiales fueron el principal canal de transmisión de los efectos del COVID-19 al comercio mundial.** Las medidas adoptadas por China en enero (cierre temporal de la provincia de Hubei y de las fronteras del país) implicaron la suspensión de exportaciones de insumos para industrias como la automotriz, electrónica, farmacéutica y de suministros médicos. Esto obligó a la paralización por varias semanas de fábricas en América del Norte, Europa y el resto de Asia que no disponían de proveedores alternativos, pues China es el principal exportador mundial de partes y componentes, con un 15% de los envíos mundiales en 2018.
- A partir de marzo, China reabrió gradualmente su economía y avanzó hacia la normalización de las exportaciones. Sin embargo, **el choque inicial de oferta sobre el comercio mundial se intensificó gradualmente con un choque de demanda**, producto de las medidas para minimizar el contagio adoptadas en Europa y posteriormente en América del Norte y el resto del mundo.
- La contracción del volumen del comercio mundial de bienes fue cercana al 18,5% en el segundo trimestre de 2020 en comparación con igual período de 2019 (OMC, 2020a). Así, la caída durante el primer semestre se habría situado en alrededor del 11%. Ello sugiere que **la contracción del comercio mundial en 2020 se ubicaría más cerca del extremo “optimista” del rango que va del -13% (similar a la caída anual en 2009) al -32% proyectado en abril**. Estas proyecciones dependen claramente de la evolución de la pandemia durante el segundo semestre, particularmente en los Estados Unidos, donde las tasas de contagio siguen en aumento.
- **El comercio de servicios también se ha visto gravemente afectado.** El valor de las exportaciones de un grupo de 37 países, que en 2019 representaron alrededor de dos terceras partes de las exportaciones mundiales de servicios, se contrajo un 10,4% en el primer cuatrimestre de 2020 en comparación con el mismo período de 2019. **El turismo, que en 2019 representó el 24% de las exportaciones mundiales de servicios, ha sido particularmente afectado.** Entre enero y abril de 2020 el número de turistas internacionales a nivel mundial disminuyó un 44% en comparación con el mismo período de 2019. Para el año completo, las proyecciones indican una reducción de entre un 58% y un 78%, dependiendo de la evolución de la pandemia y del ritmo de relajamiento de las restricciones de viaje (OMT, 2020).

B. El comercio de bienes de la región cayó un 17% entre enero y mayo de 2020

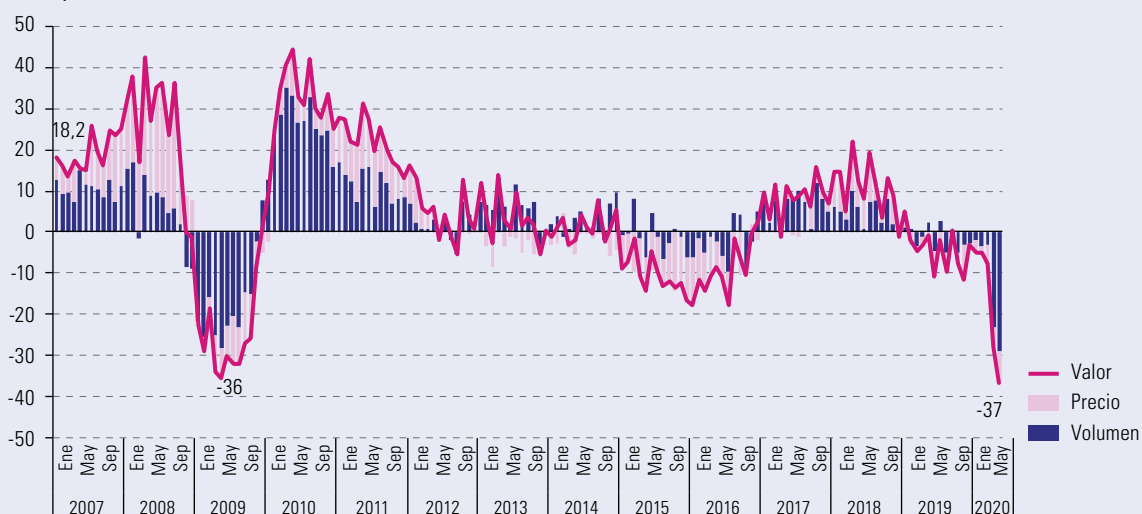
- **El valor de las exportaciones e importaciones de bienes se redujo un 17% entre enero y mayo de 2020 en comparación con el mismo período de 2019. Ambos flujos se desplomaron hacia el final del período de cinco meses en 2020, con una caída interanual del 37% en mayo.** La disminución interanual del volumen del comercio en el bimestre abril-mayo de 2020 fue mucho mayor que en igual período de 2009, durante la crisis financiera: 20% las exportaciones y 25% las importaciones (véase el gráfico 3). En el caso de las exportaciones, ello refleja tanto un choque de oferta (el cierre parcial del aparato productivo) como de demanda (contracción económica en los principales mercados de la región). En el caso de las importaciones, su descenso obedece fundamentalmente a la profunda recesión por la que atraviesa la región, con una contracción esperada de su producto del 9,1% (CEPAL, 2020a).

Gráfico 3 | América Latina y el Caribe: variación interanual de las exportaciones e importaciones de bienes según volumen, precio y valor, enero de 2007 a mayo de 2020
(En porcentajes)

A. Exportaciones



B. Importaciones



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

1. Dinámica de las exportaciones según países y bloques de integración

- **La caída del valor de las exportaciones regionales de bienes entre enero y mayo de 2020 se explica por una reducción del volumen del 8,6% y de los precios del 8%**, desplome que agudiza la pérdida de dinamismo de las exportaciones desde 2019 (véase el cuadro 2). En ese año, los envíos sufrieron los efectos de las tensiones comerciales entre los Estados Unidos y China y de los bajos precios de los minerales y metales.

Cuadro 2 | América Latina y el Caribe: variación interanual del valor de las exportaciones de bienes, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con igual mes del año anterior
(En porcentajes)

Región/Subregión/País	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril 2020	Mayo 2020
América Latina y el Caribe	10,7	-0,3	-16,6	-29,5	-37,1
Mercado Común del Sur (MERCOSUR)	5,8	-4,1	-12,4	-11,7	-16,2
Argentina	7,0	3,2	-11,5	-18,4	-15,9
Brasil	6,6	-2,1	-6,5	-5,8	-13,1
Paraguay ^a	7,5	-18,4	-8,2	-18,8	-11,2
Uruguay	4,5	1,0	-21,4	-21,0	-38,1
Venezuela (República Bolivariana de)	-1,0	-27,0	-65,0	-53,1	-47,7
Comunidad Andina (CAN)	16,6	-2,8	-23,1	-52,8	-41,4
Bolivia (Estado Plurinacional de)	24,3	-8,7	-23,8	-62,1	-58,5
Colombia	14,5	0,4	-25,0	-52,3	-40,6
Ecuador	13,6	3,1	-15,2	-44,4	-27,2
Perú	18,5	-7,3	-25,3	-56,3	-36,3
Alianza del Pacífico^b	13,9	1,7	-19,8	-37,6	-49,4
Chile	21,3	-6,6	-8,8	-6,3	-15,2
México	12,2	4,3	-20,8	-40,7	-56,7
Mercado Común Centroamericano (MCCA)	2,5	-1,8	0,4	-13,9	-8,0
Costa Rica	7,0	1,3	2,2	-11,6	-3,6
El Salvador	5,2	-1,0	-23,6	-51,0	-31,3
Guatemala	-1,3	-1,9	3,2	-8,1	-1,6
Honduras	-1,2	-8,5	2,3	-3,5	-5,7
Nicaragua	0,0	-4,1	14,1	14,7	14,6
Panamá ^c	11,7	0,7	-11,5	-30,8	-52,3
Países del Caribe	11,2	4,5	-10,0	-32,1	-33,3
Cuba	-32,1	9,5	-29,8	-38,3	-51,6
República Dominicana	7,8	4,9	-8,5	-27,4	-28,4
Comunidad del Caribe (CARICOM)	17,5	4,0	-9,7	-34,2	-35,2

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países, y Fondo Monetario Internacional (FMI), Direction of Trade Statistics [base de datos en línea] <https://data.imf.org/?sk=9D6028D4-F14A-464C-A2F2-59B2CD424B85> (para datos de Cuba, Panamá y la CARICOM).

Nota: Se estimaron los meses de abril y mayo para Cuba, los países de la CARICOM, Panamá y la República Dominicana.

^a No incluye reexportaciones.

^b Corresponde a los cuatro miembros. Los datos para Colombia y el Perú se presentan en Comunidad Andina.

^c Excluye reexportaciones de la Zona Libre de Colón.

- **La mayor caída promedio del valor exportado tuvo lugar en la Comunidad Andina (23%), debido al elevado peso de los productos energéticos y mineros en su canasta exportadora** (63% en promedio en 2018-2019). Entre diciembre de 2019 y mayo de 2020, los precios de todos los productos energéticos tuvieron reducciones de dos dígitos, y varios productos mineros también registraron disminuciones de sus precios.
- **El valor de las exportaciones de bienes de México disminuyó un 20,8% entre enero y mayo de 2020, debido, sobre todo, al desplome de los envíos manufactureros (20,9%),** que representaron el 88% del valor exportado en ese período. Solo el sector agropecuario y las actividades extractivas diferentes a la petrolera mostraron leves aumentos del 3,5% y el 5,2%, respectivamente. La contracción de los envíos se fue acentuando durante ese período, llegando a una caída interanual del 57% en mayo, producto de la fuerte recesión en los Estados Unidos. En mayo, el valor de las exportaciones automotrices cayó a una tasa anualizada del 90%, mientras que los envíos de las industrias electrónica, de plásticos y de maquinaria y equipos se contrajeron un 52%, un 51% y un 42%, respectivamente (INEGI, 2020).

- **El valor de las exportaciones del Mercado Común del Sur (MERCOSUR) sufrió una reducción del 12,4% entre enero y mayo de 2020.** Las mayores caídas se registraron en la República Bolivariana de Venezuela (65%) y el Uruguay (21,4%). En el primer caso, esto se explica en gran medida por la marcada disminución del precio del petróleo. En el Uruguay, la mayor parte del impacto negativo obedece a la merma de las ventas de manufacturas industriales y agropecuarias, con reducciones superiores al 80% en productos como muebles, hierro y acero y vehículos, que se comercializan sobre todo en el MERCOSUR (CIU, 2020). En la Argentina y el Brasil, las mayores bajas se produjeron en los envíos de manufacturas (vehículos, autopartes, productos químicos), afectados por la menor demanda intrarregional, y en los de combustibles. Por el contrario, en ambos países aumentaron los volúmenes exportados de productos agropecuarios (carnes, lácteos, soja, frutas, azúcar), principalmente a China y otros países de Asia (INDEC, 2020; Ministerio de Economía del Brasil, 2020).
- **Solo cuatro países de la región, todos centroamericanos, aumentaron sus exportaciones de bienes entre enero y mayo de 2020.** Costa Rica se vio beneficiada por el aumento de la demanda de dispositivos médicos para enfrentar la pandemia, especialmente en los Estados Unidos. Por su parte, Guatemala y Honduras aumentaron sus exportaciones de equipos de protección personal, especialmente mascarillas, y de productos agrícolas. Nicaragua se benefició del alza del precio del oro y de los volúmenes exportados de productos agrícolas y agropecuarios (café, caña de azúcar, frijoles, tabaco, entre otros). Parte de la resiliencia económica de estos países se explicaría por la importancia de los intercambios dentro de la propia subregión, que contribuyen a amortiguar la menor demanda en sus socios extrarregionales. Centroamérica exhibe el mayor coeficiente de comercio intrarregional en América Latina y el Caribe, que en 2018 alcanzó el 29,8% (CEIE, 2019).
- **Entre enero y mayo se registraron fuertes caídas en el valor de los envíos de América Latina y el Caribe a los Estados Unidos, la Unión Europea y la propia región, que conjuntamente absorbieron el 69% de sus exportaciones totales de bienes en 2019. Por el contrario, los envíos a Asia han mostrado una mayor resiliencia. En particular, las exportaciones a China cayeron menos del 2% entre enero y mayo, y se recuperaron en abril y mayo, lo que coincide con la gradual reapertura de su economía (véase el cuadro 3).**

Cuadro 3 | América Latina y el Caribe: variación interanual del valor de las exportaciones de bienes por destino, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con igual mes del año anterior (En porcentajes)

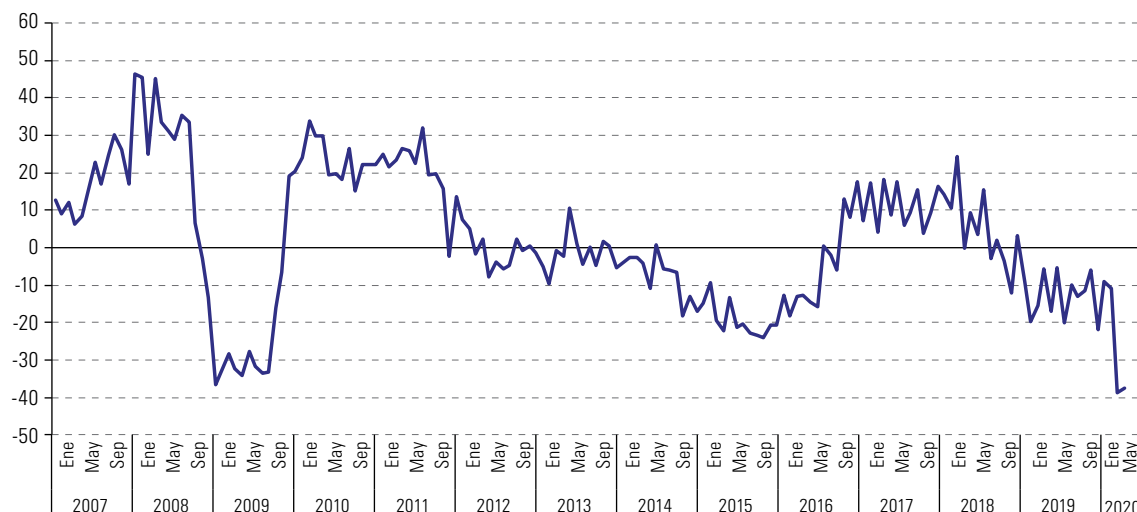
Destino	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril 2020	Mayo 2020
Mundo	10,7	-0,3	-16,6	-29,5	-37,1
Estados Unidos	6,6	4,9	-22,2	-40,5	-56,0
Unión Europea	18,7	-4,5	-14,3	-22,8	-31,2
Asia	14,9	2,4	-4,2	-1,3	-6,1
China	19,0	0,2	-1,2	3,8	3,8
Resto de Asia	10,3	5,1	-6,6	-11,3	-22,0
América Latina y el Caribe	12,5	-9,8	-23,9	-38,8	-37,4

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

- **El valor de los envíos dirigidos a la propia región tuvo una caída superior al promedio entre enero y mayo de 2020 (24%),** debido a la debilidad de la demanda en un contexto marcadamente recesivo (véase el gráfico 4). **La contracción del comercio intrarregional se ha manifestado especialmente en las manufacturas.** El sector más golpeado ha sido el automotor, con una caída cercana al 55% del valor de los intercambios entre enero y mayo de 2020, seguido del sector de textiles, confecciones y calzado. Solo el comercio de productos agroindustriales registró una modesta expansión (véase el gráfico 5).

Gráfico 4 | América Latina y el Caribe: variación interanual del valor de las exportaciones intrarregionales de bienes, enero de 2007 a mayo de 2020

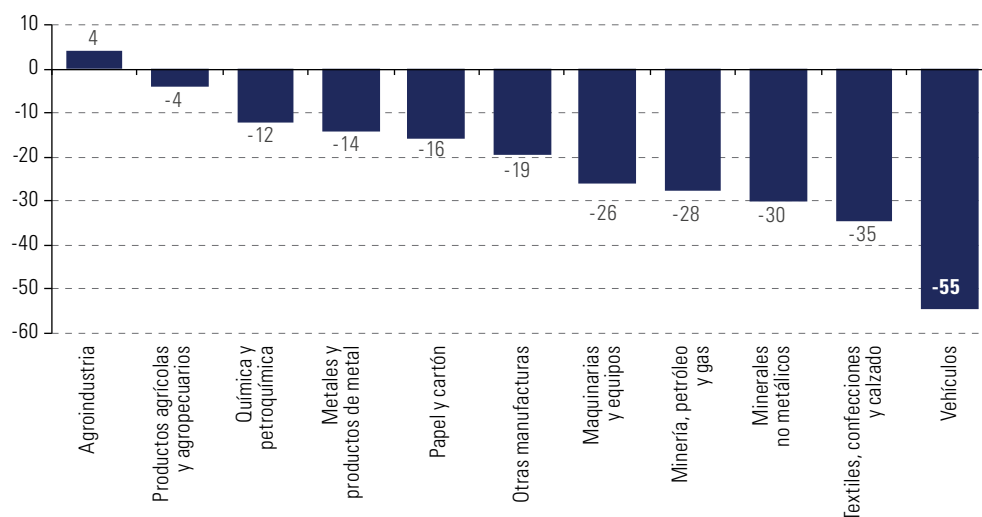
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

Gráfico 5 | América Latina y el Caribe: variación del valor de las exportaciones intrarregionales por sector, enero-mayo de 2020 en comparación con igual período de 2019

(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

- **La contracción del comercio intrarregional se dio en todos los principales bloques de integración económica.** Entre enero y mayo de 2020, el valor de los intercambios en casi todos ellos registró disminuciones interanuales de entre el 20% y el 31%. La única excepción fue el comercio entre los miembros del Mercado Común Centroamericano (MCCA), que mostró una mayor resiliencia al caer un 5,6% (véase el cuadro 4).

Cuadro 4 | América Latina y el Caribe: tasa de variación interanual de las exportaciones intrarregionales en los diversos bloques de integración, enero-mayo de 2019 y enero-mayo de 2020
(En porcentajes)

Región o bloque de integración	Tasa de variación		Coeficiente de comercio intrarregional medido por exportaciones	
	Enero-mayo 2019	Enero-mayo 2020 ^a	Enero-mayo 2019	Enero-mayo 2020
América Latina y el Caribe	-9,8	-23,9	13,7	12,5
Mercado Común del Sur (MERCOSUR)	-19,7	-22,8	11,0	9,0
Comunidad Andina (CAN)	-2,6	-28,9	7,3	7,3
Mercado Común Centroamericano (MCCA)	-1,5	-5,6	27,4	24,7
Alianza del Pacífico	-3,2	-19,9	2,8	2,7
Comunidad del Caribe (CARICOM)(enero-abril)	...	-31,2	11,4	7,4

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países, y Fondo Monetario Internacional (FMI), Direction of Trade Statistics [base de datos en línea] <https://data.imf.org/?sk=9D6028D4-F14A-464C-A2F2-59B2CD424B85> (para datos de la CARICOM).

^a Cifras preliminares.

2. Dinámica de las exportaciones por sectores

- **Entre enero y mayo, el valor de los envíos regionales de productos mineros y petróleo y de manufacturas se desplomó un 25,8% y un 18,5%, respectivamente**, en comparación con igual período de 2019. Por el contrario, **las exportaciones agrícolas y agropecuarias aumentaron un 0,9%** (véanse el cuadro 5 y el gráfico 6). Ello refleja la menor sensibilidad de la demanda de alimentos a la contracción de la actividad económica, al tratarse de bienes esenciales.
- **En el caso de los productos mineros y el petróleo, la contracción del valor exportado obedece a los menores volúmenes exportados** (consecuencia de la menor demanda) **y las caídas significativas de sus precios. En las manufacturas, la disminución es atribuible principalmente a los menores volúmenes comercializados** debido a choques de oferta (la paralización de industrias como la automotriz) y de demanda (la recesión en los principales mercados de esos productos).
- **En el caso de los productos agrícolas y agropecuarios, la Argentina, el Brasil, el Paraguay y el Uruguay se vieron favorecidos por la disminución de las ventas de Australia a China**, principalmente a causa de la sequía en ese país, que redujo la producción de granos. Los países del MERCOSUR también se vieron beneficiados por el aumento de las importaciones de carne vacuna y porcina en China para asegurar el abastecimiento de alimentos.
- **El índice de precios de los productos básicos (que incluye productos que representaron casi el 40% del valor de las exportaciones totales de bienes de la región en 2018 y 2019) sufrió un desplome del 18,2% en enero-junio de 2020** (véase el cuadro 6). La caída fue mucho mayor en los productos del rubro energía (37%), especialmente el petróleo y sus derivados.

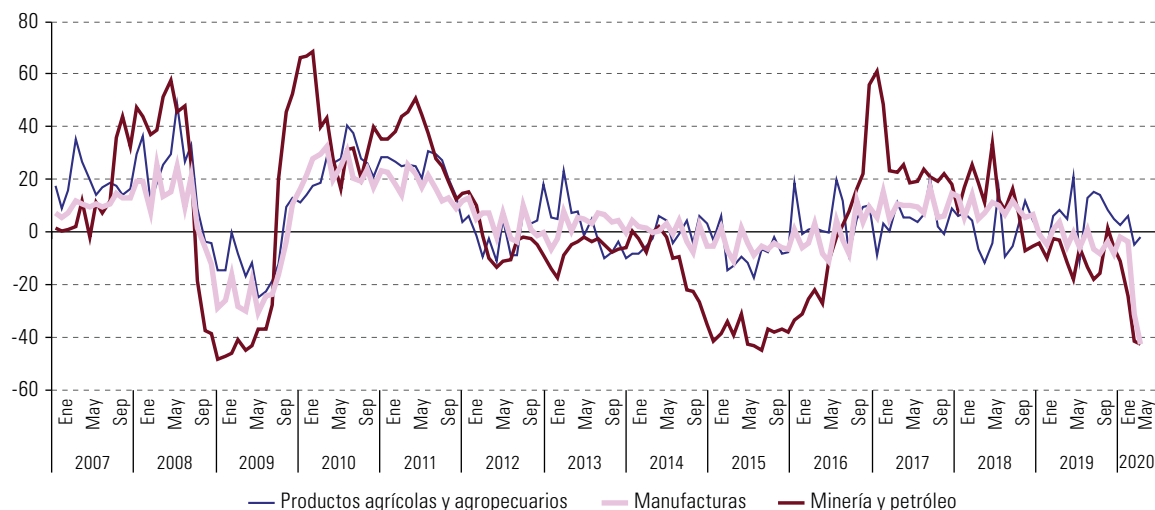
Cuadro 5 | América Latina y el Caribe: variación interanual del valor de las exportaciones de bienes según grandes sectores, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con igual mes del año anterior
(En porcentajes)

Sector	Participación en el total (2019)	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril	Mayo
Todos los sectores	100,0	10,7	-0,3	-16,6	-29,5	-37,1
Productos agrícolas y agropecuarios	13,4	3,8	2,7	0,9	-5,2	-4,2
Minería y petróleo	20,8	17,5	-5,1	-25,8	-41,6	-43,0
Manufacturas	65,8	10,3	1,0	-18,5	-31,2	-43,1

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

Gráfico 6 | América Latina y el Caribe: variación interanual del valor de las exportaciones de bienes por grandes sectores, enero de 2007 a mayo de 2020

(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

Cuadro 6 | América Latina y el Caribe: variación de los precios de los principales productos básicos de exportación, y variación proyectada para 2020

(En porcentajes)

	Participación en las exportaciones totales de bienes	Variación diciembre de 2019 a junio de 2020	Variación proyectada en 2020
Total de productos básicos	39,4	-18,2	-18,5
Energía	14,7	-37,0	-39,3
Petróleo	11,2	-37,5	-40,2
Derivados de petróleo	2,0	-48,0	-42,7
Gas natural	1,0	-22,7	-30,7
Carbón	0,5	-11,5	-21,8
Minerales y metales	9,4	-1,9	-6,1
Otros minerales y metales	2,6	-13,4	-16,2
Cobre	2,5	-7,0	-12,6
Oro	2,0	14,9	15,9
Hierro	1,3	10,1	-9,5
Aluminio	0,5	-10,9	-14,8
Níquel	0,1	-22,5	-17,7
Estaño	0,1	-3,3	-14,5
Agrícolas y agropecuarios	15,3	-10,1	-5,9
Aceite de soja	2,1	-21,2	-7,8
Banano	2,4	13,0	11,2
Carne bovina	2,1	-15,5	-5,1
Soja	1,9	-11,1	-9,3
Café	1,3	-19,6	-9,2
Azúcar	1,2	-22,0	-11,4
Harina de pescado	1,0	1,3	-5,1
Maíz	1,0	1,8	-5,5
Camarones y crustáceos	0,7	-6,1	4,3

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de datos de Bloomberg, The Economist Intelligence Unit, la Bolsa de Cereales de Buenos Aires, la Corporación Chilena del Cobre (COCHILCO) y la Oficina de Estudios y Políticas Agrarias de Chile (ODEPA).

- **El precio del petróleo registró mínimos históricos durante abril.** El barril de West Texas Intermediate (WTI) llegó a cotizarse en valores negativos en el mercado de futuros, en el contexto de una marcada reducción de la demanda global y una guerra de precios entre algunos de los principales productores. Después de una disminución de hasta el 66% en abril-mayo, que lo mantuvo en torno a 30 dólares el barril, el precio ha repuntado levemente y se mantiene volátil.
- **Los precios de los minerales y metales también han sufrido las consecuencias de las menores expectativas de demanda global.** Hasta junio, la mayoría de ellos anotó mermas en sus precios de entre el 10% y el 17%. Su evolución futura depende fundamentalmente de la reactivación de la producción siderúrgica y metalmeccánica, y de la construcción en China. En el primer semestre, solo aumentaron el precio del oro y el mineral de hierro. En el caso del primero, debido principalmente a su calidad de reserva de valor. En el del segundo, el aumento de su precio desde la segunda mitad de mayo obedece a un brote de la pandemia en el complejo Itabira de la empresa Vale. Dado que el 70% de la oferta del mineral transportado por vía marítima corresponde al Brasil, el impacto fue inmediato durante junio, con un alza del 10% con respecto al cierre de su cotización en diciembre. Se espera que el precio vuelva a bajar cuando se restablezcan las operaciones.
- **Entre los productos agrícolas y agropecuarios, las reducciones de los precios han sido menores que el promedio del resto de los productos básicos,** destacándose las alzas en el precio del banano y de los camarones y crustáceos.

3. Dinámica de las importaciones

- **Entre enero y mayo de 2020, el valor de las importaciones de bienes de la región cayó un 17,1%, debido a una baja del volumen del 12% y una reducción de los precios del 5%. Las compras externas disminuyeron en todas las categorías de bienes,** contracción que se acentuó a lo largo de ese período (véanse el cuadro 7 y gráfico 7). La mayor caída se produjo en los combustibles (34%), resultado influido por la disminución de sus precios. Todas las otras categorías tuvieron descensos superiores al 10%. **Particularmente preocupante resulta la contracción de las importaciones de bienes de capital y de insumos intermedios (14,5% y 13,6%, respectivamente), que afectará la tasa de inversión y comprometerá la recuperación.**
- **El valor de las importaciones se contrajo en todos los países de la región** (véase el cuadro 8), como resultado de la recesión. A diferencia de lo ocurrido con las exportaciones, las importaciones se contrajeron marcadamente desde todos los principales países proveedores (véase el cuadro 9).

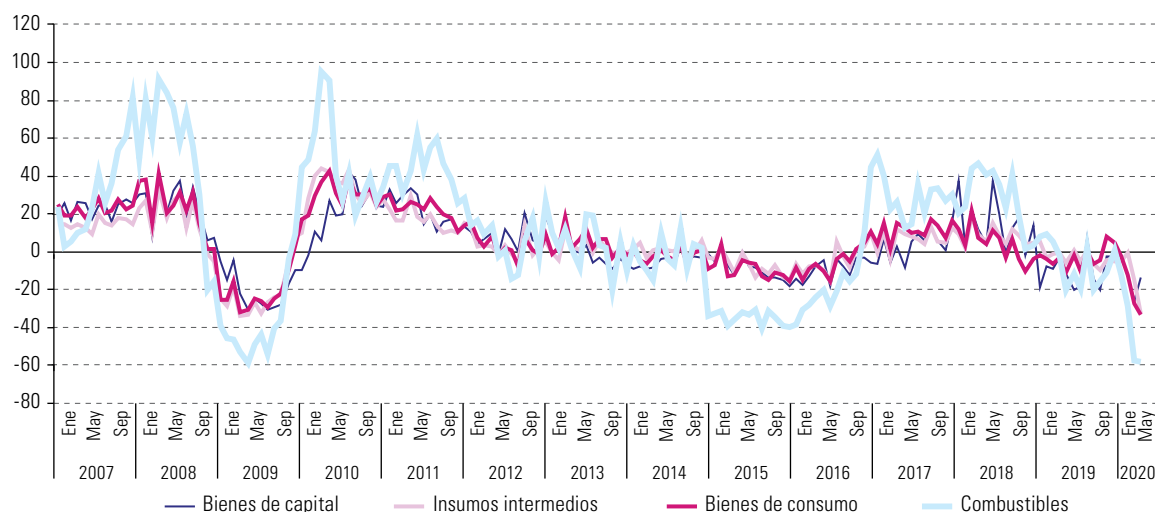
Cuadro 7 | América Latina y el Caribe: variación interanual del valor de las importaciones de bienes según grandes categorías económicas, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con igual período del año anterior
(En porcentajes)

Categorías	Participación en el total (2019)	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril	Mayo
Todas las categorías	100,0	13,5	-1,3	-17,1	-28,0	-37,0
Bienes de capital	14,6	17,1	-5,2	-14,5	-29,4	-22,9
Insumos intermedios	54,8	10,1	0,9	-13,6	-16,9	-37,0
Bienes de consumo	18,2	11,7	-3,9	-17,1	-31,3	-39,1
Combustibles	12,5	33,0	4,7	-34,0	-59,2	-63,7

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

Gráfico 7 | América Latina: variación interanual del valor de las importaciones de bienes según grandes categorías económicas, enero de 2007 a mayo de 2020

(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

Cuadro 8 | América Latina y el Caribe: variación interanual del valor de las importaciones de bienes, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con el mismo período del año anterior

(En porcentajes)

Región/Subregión/País	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril 2020	Mayo 2020
América Latina y el Caribe	13,5	-1,3	-17,1	-28,0	-37,0
MERCOSUR	18,3	-10,1	-8,9	-20,3	-17,1
Argentina	18,8	-28,7	-23,8	-30,1	-31,8
Brasil	18,0	1,8	-2,5	-14,8	-10,5
Paraguay	20,1	-7,2	-19,9	-50,7	-36,1
Uruguay	12,5	-10,1	-6,3	-18,8	-17,5
Venezuela (República Bolivariana de)	22,0	-56,8	-45,1	-36,3	-42,0
Comunidad Andina	11,3	3,2	-20,5	-34,4	-42,9
Bolivia (Estado Plurinacional de)	5,2	7,3	-37,7	-63,3	-61,0
Colombia	6,0	5,2	-17,8	-28,4	-45,4
Ecuador	23,1	4,5	-25,2	-41,3	-48,9
Perú	13,4	-0,7	-18,5	-31,8	-36,9
Alianza del Pacífico	12,4	1,7	-19,3	-29,6	-44,6
Chile	16,9	-0,5	-20,5	-22,7	-36,4
México	12,3	1,9	-19,0	-30,5	-47,1
Mercado Común Centroamericano	9,0	-2,5	-14,0	-25,4	-22,6
Costa Rica	6,0	-1,3	-9,1	-18,6	-15,1
El Salvador	11,3	6,2	-18,0	-32,9	-45,2
Guatemala	10,0	1,9	-7,5	-16,0	-18,1
Honduras	10,6	-0,5	-14,9	-28,9	-22,5
Nicaragua	4,9	-21,4	-28,2	-43,9	-31,2
Panamá ^a	10,5	-11,0	-25,7	-32,0	-37,4
Países del Caribe	7,7	7,1	-25,8	-35,9	-44,8
Cuba	6,9	-2,1	-40,7	-57,1	-41,3
República Dominicana	11,6	4,7	-21,5	-29,9	-48,5
Comunidad del Caribe (CARICOM)	5,5	11,0	-25,1	-33,8	-43,1

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países, y Fondo Monetario Internacional (FMI), Direction of Trade Statistics [base de datos en línea] <https://data.imf.org/?sk=9D6028D4-F14A-464C-A2F2-59B2CD424B85> (para datos de Cuba, la República Dominicana y la CARICOM).

Nota: Se estimaron los meses de abril y mayo para Cuba, los países de la CARICOM, Panamá y la República Dominicana.

^a No incluye información de la Zona Libre Colón.

Cuadro 9 | América Latina y el Caribe: variación interanual del valor de las importaciones de bienes por origen, enero-mayo de 2018 a enero-mayo de 2020, y abril y mayo de 2020 en comparación con el mismo mes del año anterior
(En porcentajes)

	Enero-mayo 2018	Enero-mayo 2019	Enero-mayo 2020	Abril 2020	Mayo 2020
Mundo	13,5	-1,3	-17,1	-28,0	-37,0
Estados Unidos	10,6	-0,5	-19,6	-38,2	-48,7
Unión Europea	23,3	-5,3	-18,1	-23,1	-39,0
Asia	13,4	5,2	-16,0	-21,8	-34,2
China	17,0	6,0	-17,4	-21,4	-33,4
Resto de Asia	9,0	4,1	-14,1	-22,2	-35,0
América Latina y el Caribe	11,8	-7,8	-25,1	-34,5	-42,4

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

C. El colapso del turismo arrastra a las exportaciones de servicios

- **En el primer trimestre de 2020, el valor de las exportaciones e importaciones de servicios de un grupo de 11 países de la región disminuyó un 10,2% y un 9%, respectivamente, en comparación con el mismo período de 2019** (véase el cuadro 10)². Al igual que lo ocurrido con el comercio de bienes, la tendencia del comercio de servicios fue declinante a lo largo del trimestre (véase el gráfico 8). Sin embargo, el desplome del valor del comercio de servicios en esos países fue muy superior al del comercio de bienes, que anotó caídas del 2,7% y el 4,6% en las exportaciones e importaciones, respectivamente.
- **La mayor caída de las exportaciones regionales de servicios entre enero y marzo de 2020 se observa en el componente viajes (17,4%), debido a la virtual paralización de la llegada de turistas internacionales** (véase el gráfico 9). En segundo lugar, se ubican las exportaciones de servicios de transporte, que caen un 6,8% en el contexto de la contracción del comercio regional de bienes y de restricciones para contener la pandemia. Las exportaciones de otros servicios sufren la menor caída (2,4%), e incluso en esta categoría algunos rubros aumentan. En efecto, las medidas de distanciamiento social han aumentado la demanda de servicios que pueden suministrarse en forma digital como la comunicación, las compras, la educación, la medicina y la entretención (OMC, 2020b).

Cuadro 10 | América Latina (11 países)^a: variación interanual del valor del comercio de servicios por sector, primer trimestre de 2019 y de 2020
(En porcentajes)

Sector	Exportaciones		Importaciones	
	Enero-marzo 2019	Enero-marzo 2020	Enero-marzo 2019	Enero-marzo 2020
Total servicios	0,0	-10,2	-6,1	-9,0
1. Transportes	2,4	-6,8	-3,3	-7,5
2. Viajes	1,5	-17,4	-15,0	-25,4
3. Otros servicios	-3,0	-2,4	3,7	-0,1
Servicios de comunicaciones, informática e información	3,4	2,3	-2,5	17,3
Servicios de construcción	6,8	-1,6	-55,3	-39,0
Servicios de seguros	1,7	0,0	12,2	-0,4
Servicios financieros	6,4	24,3	19,6	-4,1
Regalías y derechos de licencia	-19,8	-3,1	-10,0	-11,5
Otros servicios empresariales	-7,2	-0,8	-7,9	-2,6
Servicios personales, culturales y recreativos	26,8	8,6	...	13,8

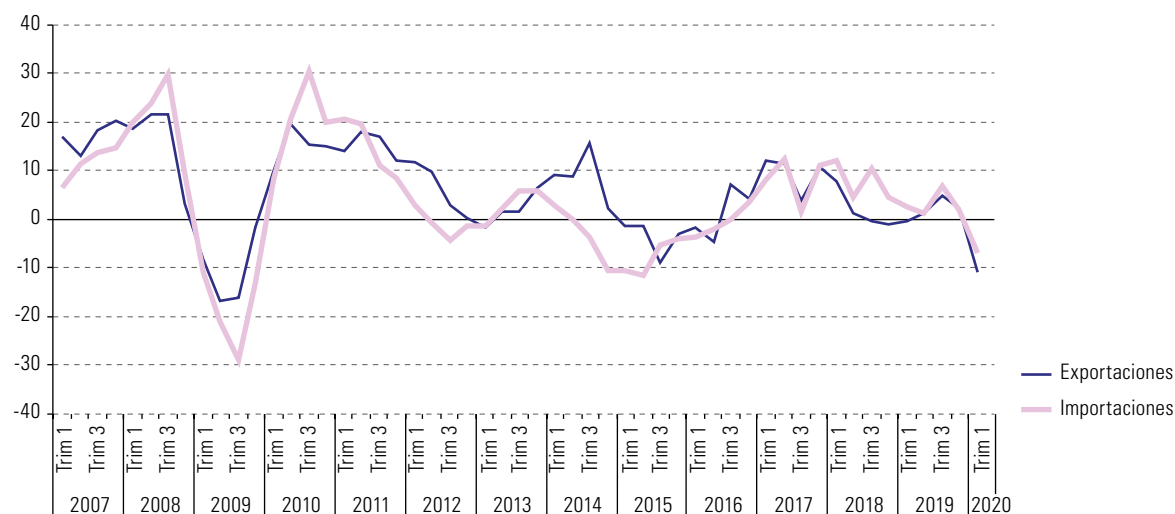
Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales de los países.

^a Los países considerados son: Argentina, Bolivia (Estado Plurinacional de), Brasil, Chile, Colombia, Costa Rica, El Salvador, México, Perú, República Dominicana y Uruguay. Estos países representan el 78% de las exportaciones y el 82% de las importaciones de servicios comerciales de la región.

² A diferencia de los bienes, la recopilación estadística sectorial para los servicios se realiza de modo trimestral, por lo que no se dispone de información para el período enero-mayo de 2020.

Gráfico 8 | América Latina (11 países)^a: variación interanual del valor del comercio de servicios, primer trimestre de 2007 a primer trimestre de 2020

(En porcentajes)



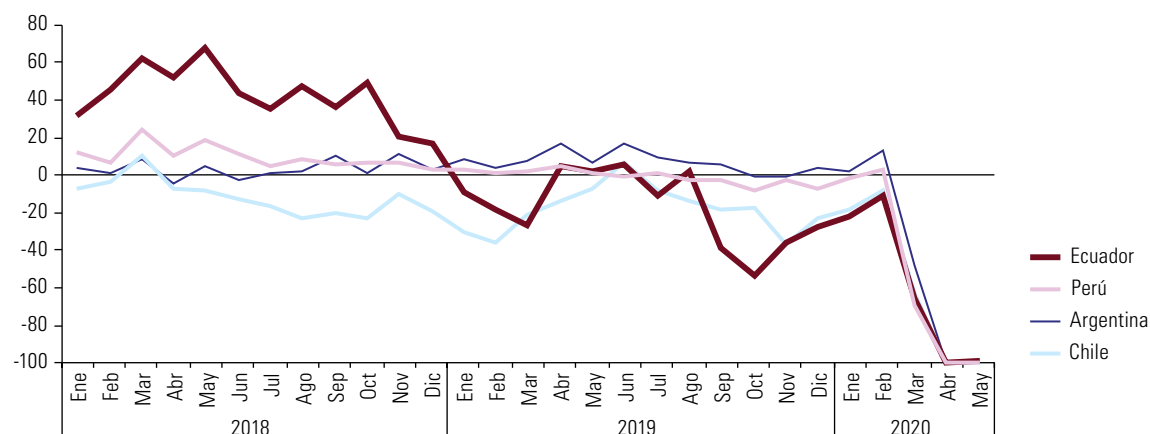
Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales de los países.

^a Los países considerados son: Argentina, Bolivia (Estado Plurinacional de), Brasil, Chile, Colombia, Costa Rica, El Salvador, México, Perú, República Dominicana y Uruguay.

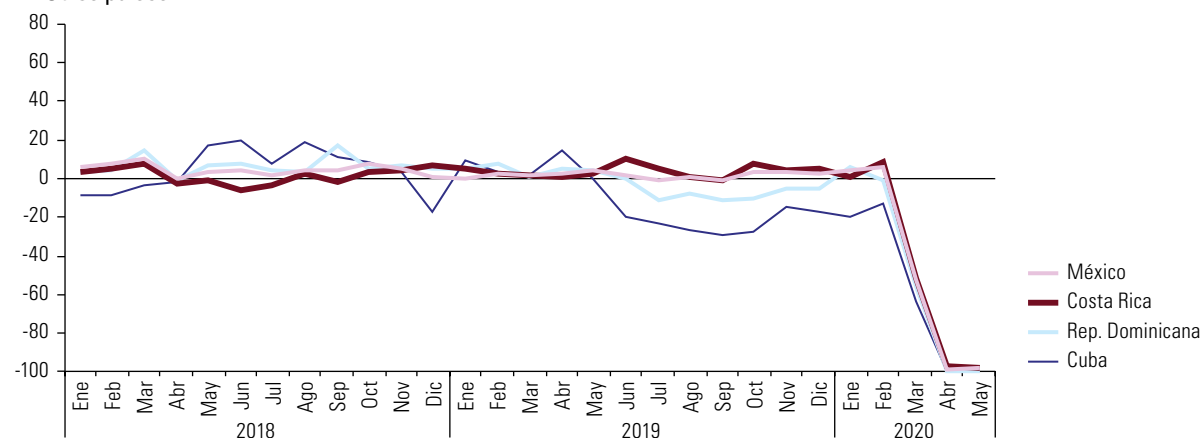
Gráfico 9 | América Latina y el Caribe (países seleccionados): variación interanual de las llegadas de turistas internacionales, enero de 2018 a mayo de 2020

(En porcentajes)

A. Países de América del Sur



B. Otros países

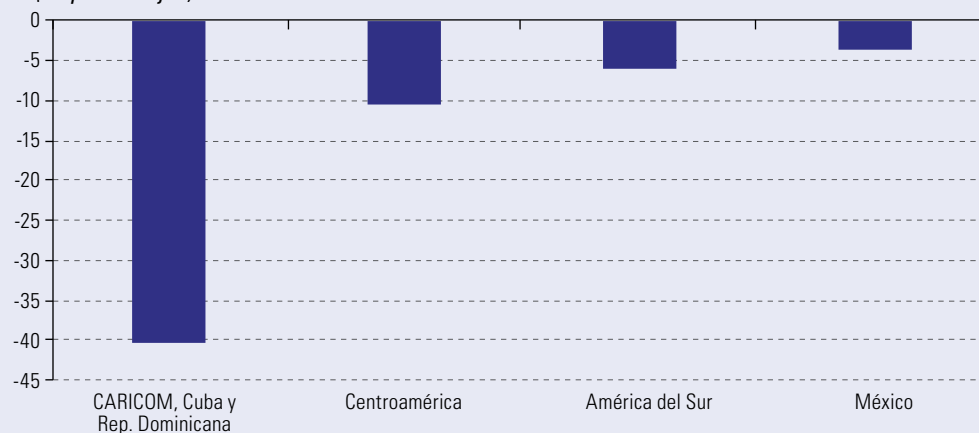


Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información oficial.

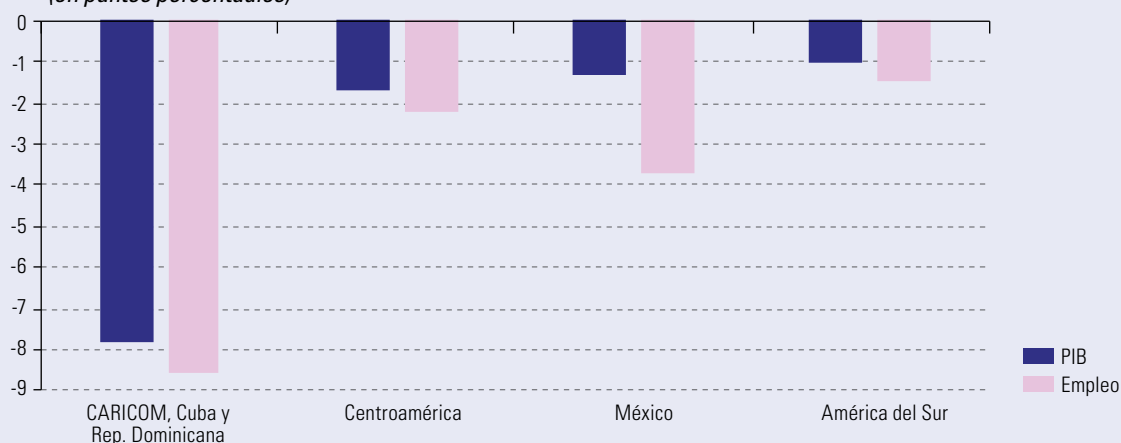
- **La paralización del turismo es grave para la región pues representó el 48% del valor de sus exportaciones totales de servicios en 2019**, el doble de su participación en las exportaciones mundiales de servicios. La situación es particularmente grave para los países del Caribe, en los cuales el turismo representó en 2019 el 45% de las exportaciones totales de bienes y servicios. En este contexto, se proyecta que en 2020 el valor de las exportaciones de bienes y servicios del Caribe disminuya un 40% (véase el gráfico 10). Por su parte, el PIB y el empleo total podrían verse reducidos en alrededor de 8 y 9 puntos porcentuales, respectivamente (CEPAL, 2020b).

Gráfico 10 | América Latina y el Caribe (países y subregiones seleccionados): caída proyectada de las exportaciones, el PIB y el empleo, 2020

A. Exportaciones de bienes y servicios
(en porcentajes)



B. PIB y empleo
(en puntos porcentuales)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), "Medidas de recuperación del sector turístico en América Latina y el Caribe: una oportunidad para promover la sostenibilidad y la resiliencia", *Informes COVID-19*, Santiago, julio de 2020.

Nota: En este análisis la Comunidad del Caribe (CARICOM) no incluye Montserrat; Centroamérica no incluye El Salvador y en el gráfico B no incluye Panamá; América del Sur no incluye la República Bolivariana de Venezuela.

D. Los problemas en el transporte internacional traban el comercio regional

- **A nivel mundial, el comercio marítimo por contenedores ha seguido una tendencia descendente desde la irrupción de la pandemia.** Aunque hasta febrero aumentaba en algunas regiones, desde marzo cayó en la gran mayoría de ellas (véase el cuadro 11). En América Latina, la variación interanual en el período enero-mayo de 2020 fue del -6,1%, con marcadas disminuciones en abril y mayo.
- **A pesar de la caída del tráfico marítimo en 2020, los fletes del transporte de contenedores se mantuvieron por encima de los valores de 2019** (véase el gráfico 11), salvo en el período de baja estacional anual debido al Año Nuevo chino. A fines de abril, se inició un alza sostenida de los fletes y

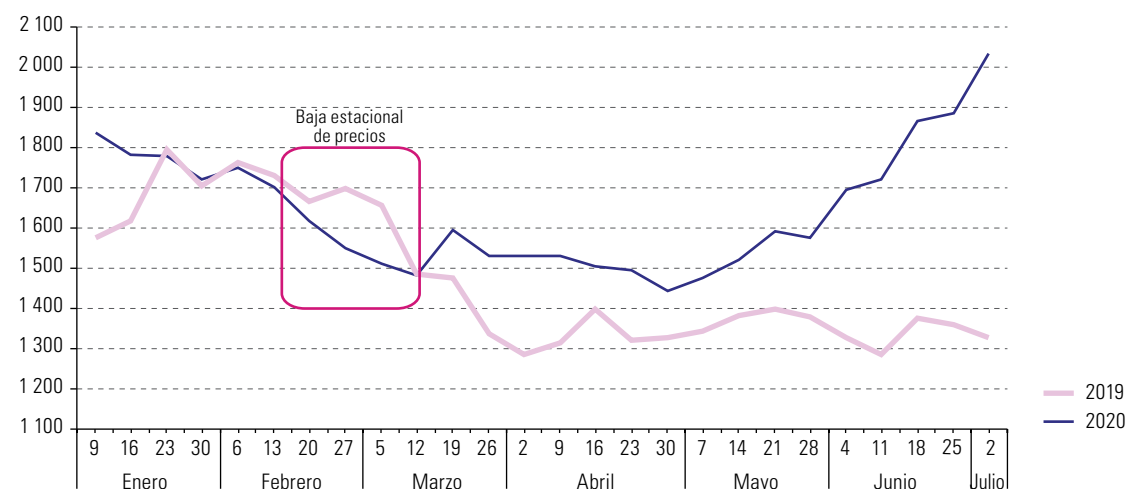
el 2 de julio de 2020 superaban en un 48% su nivel del año anterior. Ello sugiere que la industria pudo administrar la oferta y lograr así un nivel de precios que le permitió sortear en parte la disminución de la demanda causada por el COVID-19. Pese a ello, seis de las diez mayores navieras del mundo han solicitado ayuda de los gobiernos de sus países de origen: CMA CGM, COSCO Shipping Lines, HMM, Evergreen Marine, Yang Ming y Pacific International Lines (PIL).

Cuadro 11 | Variación interanual del comercio internacional marítimo por contenedores, enero a mayo de 2020
(En porcentajes)

	Enero	Febrero	Marzo	Abril	Mayo	Enero a mayo
América Latina	3,1	2,9	2,5	-16,6	-20,9	-6,1
América del Norte	-0,5	-6,8	-3,2	-15,5	-17,3	-8,8
Europa	0,9	-3,9	-1,8	-16,3	-14,6	-7,3
Lejano Oriente	2,3	-12,4	-6,1	-13,8	-6,0	-7,0
Subcontinente indio y Oriente Medio	3,5	6,5	-3,4	-27,6	-21,2	-8,9
Mundo	1,8	-6,2	-3,9	-15,9	-11,4	-7,3

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de Container Trades Statistics (CTS).

Gráfico 11 | Costo de los fletes marítimos de contenedores, enero a junio de 2019 y enero a junio de 2020
(En dólares por contenedor de 40 pies)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de Drewry.

- **La irrupción de la pandemia ha causado una marcada reducción del movimiento portuario en gran parte de los puertos de la región.** El cuadro 12 muestra la variación interanual de la actividad portuaria de contenedores entre enero y mayo de 2020 en una muestra de puertos que representa el 80% de la carga total de América Latina y el Caribe. La caída regional de la actividad portuaria de contenedores es de alrededor del 1%, mientras que para el mismo período la suma de importaciones y exportaciones por contenedor se redujo un 6%. La diferencia entre ambas cifras se explica porque otros movimientos portuarios, operativos y de transbordo compensaron la caída del comercio internacional en contenedores. Los datos preliminares recogidos al cierre de junio de 2020 permiten ver que en ese mes, tanto el movimiento total de contenedores como la suma del de importaciones y exportaciones por contenedor de la región se contrajo otros 4 puntos porcentuales respecto de la reducción observada hasta mayo.
- **La creciente concentración de la industria naviera genera preocupación** por su posible impacto en los fletes durante la contracción y la recuperación. En 1992, el mercado del transporte marítimo estaba compuesto principalmente por 30 empresas, que representaban alrededor del 63% de la flota total. En 1998, se conformaron seis alianzas, que representaban el 50% de la flota mundial. Entre 2000 y 2010, se duplicó la capacidad combinada de la flota de los 30 principales transportistas y alcanzó los 10,81 millones de unidades equivalentes a 20 pies (TEU). En 2018, tres de las alianzas tenían una participación combinada cercana al 70% de la oferta (capacidad) mundial, y en 2020 han aumentado su participación al 84,2%.

Cuadro 12 | América Latina y el Caribe (puertos seleccionados): evolución de la actividad portuaria de contenedores, enero a mayo de 2020 en comparación con el mismo período de 2019
(En porcentajes)

Puertos y porcentaje de la actividad portuaria de cada país		País	Participación en el total regional en unidades equivalentes a 20 pies (TEU) (2019)	Variación enero-mayo 2020
Puertos con caídas de actividad			43,4	
Mayores	Buenaventura (25%)	Colombia	2,1	-32,9
	Valparaíso (31%)	Chile	1,7	-28,0
	Lázaro Cárdenas (19%)	México	2,4	-18,8
	Freeport (85%)	Bahamas	2,6	-16,6
	Caucedo (67%)	República Dominicana	2,3	-15,0
	Altamira (13%)	México	1,6	-14,9
	San Antonio (60%)	Chile	3,2	-10,2
	Veracruz (16%)	México	2,1	-9,8
	Río Grande (7%)	Brasil	1,4	-9,5
	Brasil, otros (28%)	Brasil	5,3	-7,0
	Iquique (6,1%)	Chile	0,2	-6,4
	El Callao (86%)	Perú	4,3	-5,9
	Manzanillo (42%)	México	5,7	-3,8
Moderadas	Limón-Moin (80%)	Costa Rica	2,3	-2,3
	Buenos Aires (84%)	Argentina	2,7	-1,5
	Kingston (85%)	Jamaica	3,0	-1,1
	Point Lisas (48%)	Trinidad y Tabago	0,3	-0,4
Puertos con aumentos de actividad			36,8	
Moderadas	Montevideo (100%)	Uruguay	1,4	0,1
	Itajaí (12%)	Brasil	2,3	1,9
	Guayaquil (91%)	Ecuador	3,6	2,6
	Zárate (6%)	Argentina	0,3	3,2
	Santos (38%)	Brasil	7,2	7,1
	Itapoa (7%)	Brasil	1,4	8,1
	Paranagua (8%)	Brasil	1,6	9,3
Mayores	Rosario (3%)	Argentina	0,1	10,5
	Bahía de Cartagena (67%)	Colombia	5,4	11,7
	Panamá, costa del Caribe, 3 terminales (60%)	Panamá	8,1	14,0
	Panamá, costa del Pacífico, 2 terminales (39%)	Panamá	5,3	17,4
Todos los puertos seleccionados			80,2	-0,8

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de operadores y autoridades portuarias.

- **La creciente concentración ha redundado en procesos de integración vertical con los puertos.** Por ejemplo, de acuerdo a datos de la CEPAL, a fines de marzo de 2020, las terminales integradas manejaban el 68% de los contenedores en Buenos Aires y el 49% en el Brasil. En el puerto de Callao (Perú), representan el 41% del total movilizado y en el Caribe el 35% del transbordo total.
- **La súbita y prolongada caída del tráfico aéreo pone en riesgo a la industria y sus trabajadores y puede socavar la conectividad en la región.** Las restricciones a los viajes se tradujeron en que la aviación haya sido uno de los sectores más afectados por la pandemia. Según la base de datos Data+ de la Organización de Aviación Civil Internacional (OACI), en mayo de 2020 los indicadores mundiales de tráfico aéreo de pasajeros (ingresos por pasajeros-kilómetros de pago (RPK)) y de carga aérea (toneladas-kilómetros de carga (FTK)) mostraban caídas interanuales del 98,9% y el 62,1%, respectivamente.
- **En la Argentina, el Brasil, Chile y Colombia, las caídas en mayo de 2020 fueron en promedio del 95% (tráfico aéreo de pasajeros) y el 46% (carga aérea).** El hecho de que el volumen de

carga transportada disminuyera menos en la región que a nivel mundial se explica por la baja participación de la logística aérea en el comercio internacional de la región. Esto permitió que, ante una demanda creciente y urgente de productos esenciales, algunas aerolíneas transformaran temporalmente sus aviones de pasajeros en cargueros aéreos, con lo que aumentaron los factores de capacidad y aminoraron la caída.

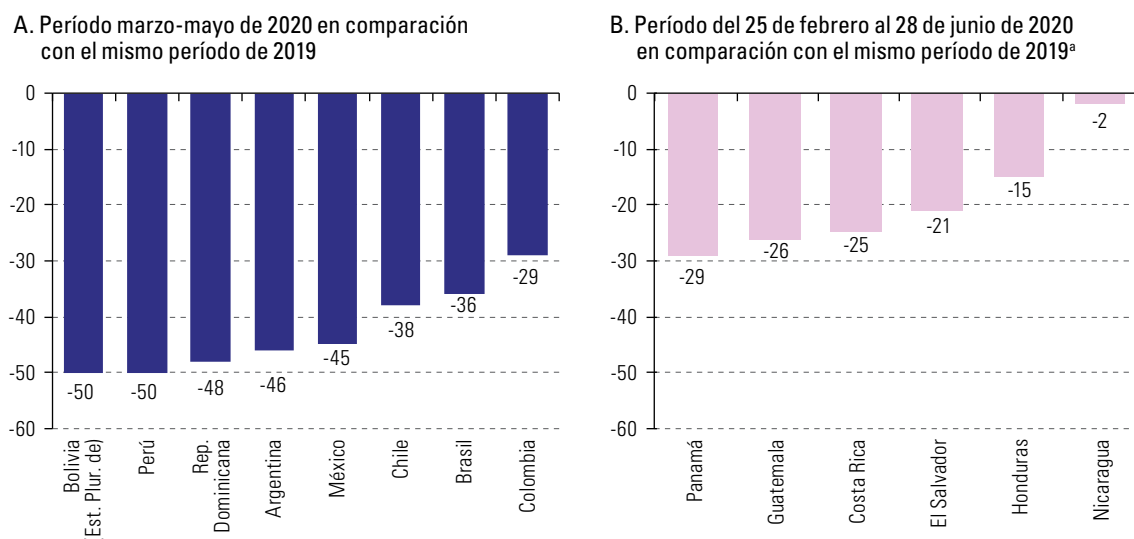
■ **La incertidumbre sobre la evolución de la pandemia y las medidas que deberá implementar la industria para retomar sus actividades, sumada a las precarias condiciones financieras de muchas empresas antes de la pandemia, ha llevado a la industria aérea a la peor crisis de su historia.** Según la Asociación del Transporte Aéreo Internacional (IATA), la pérdida neta de las aerolíneas en 2020 podría alcanzar los 84.300 millones de dólares, lo que pondría en riesgo aproximadamente 32 millones de puestos de trabajo (IATA, 2020a). Desde el inicio de 2020 hasta fines de mayo, las aerolíneas perdieron casi la mitad de su valor de mercado a nivel mundial, mientras que en la región la caída llegó al 70%.

■ **El fuerte impacto de la pandemia ha llevado a varias aerolíneas a solicitar apoyo financiero.** Varios gobiernos del mundo comprometieron 123.000 millones de dólares en ayuda financiera al sector (IATA, 2020a). En los mercados emergentes, sin embargo, esas medidas han tenido un alcance relativamente limitado. Varias aerolíneas de la región (Aeroméxico, Avianca y LATAM) se vieron obligadas a iniciar procesos de reestructuración financiera en el marco del capítulo 11 de la Ley de quiebras de los Estados Unidos.

■ **Dado el papel crucial de la aviación en la conectividad territorial, el turismo y la creación de empleo, el futuro de las empresas del sector incidirá en el desempeño económico de la región.** El impacto de la pandemia en los niveles de deuda de las aerolíneas, y sus posibles consecuencias sobre las rutas atendidas, las frecuencias y las tarifas de los servicios, pueden tener efectos negativos en la conectividad de los territorios extremos y la asequibilidad de sus servicios. Ello se debe a que muchas zonas insulares, alejadas o de difícil acceso dependen de los servicios aéreos para la movilidad de sus habitantes, la logística de sus cargas y la llegada de turistas.

■ **El cierre de actividades productivas, las medidas sanitarias más estrictas y los obstáculos administrativos han frenado el transporte terrestre.** Pese a que el transporte por camión es crucial para satisfacer la demanda de artículos esenciales, se observa una menor actividad como consecuencia de la pandemia. A nivel mundial, se prevé que la disminución de la facturación anual de las empresas del sector en 2020 será de alrededor del 18%; en América Latina alcanzaría al 20% (IRU, 2020). Estas proyecciones son concordantes con la caída del volumen transportado durante la primera mitad del año (véase el gráfico 12).

Gráfico 12 | América Latina (14 países): variación interanual del volumen de mercancías transportadas por camión, 2020
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de la Secretaría de Integración Económica Centroamericana (SIECA) y federaciones de camioneros.

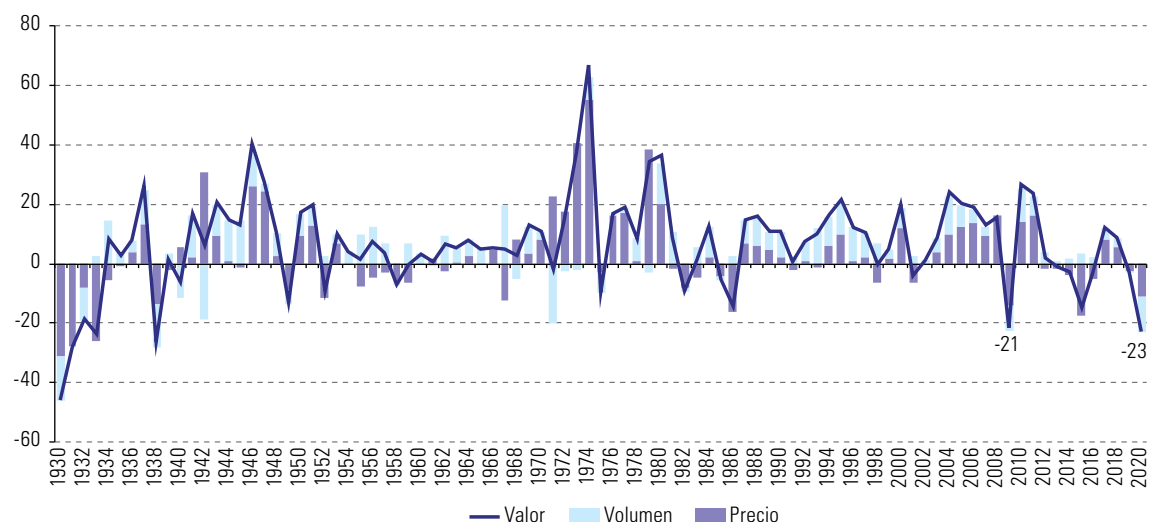
^a Número de declaraciones de tránsito terrestre por país de inicio en el sistema de Declaración Única Centroamericana (DUCA).

- **La disminución del volumen total transportado por camión se explica principalmente por la menor actividad económica** y la paralización de sectores vinculados a la construcción, el turismo, el transporte de combustibles y las autopartes. **Otro elemento que ha incidido en la menor actividad de transporte es el aumento de la duración de los ciclos de operación.** Los tiempos de carga, descarga y tránsito se han incrementado debido a medidas como el establecimiento de barreras sanitarias en los principales corredores de transporte. Las demoras adicionales se han producido por problemas de facilitación de procesos, desconocimiento de protocolos de tránsito o la restricción de los plazos de permanencia de conductores extranjeros en cada país. Por ejemplo, en algunos casos las autoridades locales cerraron los accesos viales, prohibieron la apertura de recintos para prestar servicios sanitarios a los transportistas o incluso el descenso de estos en sus localidades para alimentarse o atender alguna emergencia con la carga.
- Al mismo tiempo que han disminuido los ingresos como consecuencia de las bajas de los fletes, **han aumentado los retornos en vacío por la falta de carga en ambos extremos de la cadena de suministro. También se ha acentuado el distanciamiento temporal de los pagos,** lo que reduce la liquidez de los transportistas, quienes, en su mayoría, operan como empresas unipersonales o microempresas. La informalidad característica del sector podría redundar en que no cumplieran con los requisitos necesarios para optar a ayudas financieras dirigidas a empresas.
- **Se debe avanzar en la facilitación del comercio y de la logística internacional.** Una logística eficiente y fluida es fundamental para asegurar el suministro oportuno de insumos y alimentos, así como para reducir distorsiones y sobrepuestos que afectan desproporcionadamente a la población más vulnerable. Sin embargo, en algunos casos, para detener la propagación del virus se dictaron medidas restrictivas que afectaron el tránsito de mercancías e insumos entre países vecinos. Un ejemplo fue el cierre de fronteras por parte de Costa Rica, frente al riesgo derivado del aumento de los casos importados. Inmediatamente, los círculos empresariales y representantes del sector del transporte por camiones de los países vecinos alertaron sobre los impactos económicos de la medida. En respuesta, las autoridades centroamericanas aprobaron un protocolo de bioseguridad para el transporte de carga y comenzaron a implementar procedimientos coordinados para detener la propagación del coronavirus (véase SIECA, 2020).
- **La logística urbana y el comercio electrónico han resultado vitales para la continuidad operativa de las actividades urbanas,** al favorecer la distribución de alimentos y bienes necesarios para los largos períodos de confinamiento a los que ha estado sometida buena parte de la población. Un desafío en este sector es cómo proteger a los trabajadores de los riesgos de contagio y de la precariedad laboral en que gran parte de ellos se desempeñan, especialmente los migrantes. A mediano plazo, es urgente integrar la logística urbana a las políticas de transporte, reduciendo el número de viajes o haciéndolos más eficientes (por ejemplo, mediante la colaboración logística y el uso de medios con menores externalidades negativas, como la electromovilidad). Ello debería ir sumado a medidas que fortalezcan la coordinación de esas acciones con las de desarrollo territorial, uso del suelo y densificación de las ciudades.

E. Las exportaciones y las importaciones de bienes se reducirían en una cuarta parte en 2020

- **Se estima que en el primer semestre del año los valores de las exportaciones y de las importaciones regionales de bienes habrían tenido caídas interanuales del 17% y el 18%, respectivamente.** El continuo deterioro de las perspectivas de crecimiento de varios de los principales mercados de la región y la incertidumbre sobre la evolución de la pandemia impiden prever una recuperación del comercio exterior regional en el segundo semestre.
- **En este contexto, la Comisión Económica para América Latina y el Caribe (CEPAL) proyecta que en 2020 el valor de las exportaciones de bienes de la región se contraerá un 23%, como resultado de caídas del precio (11%) y del volumen (12%) (véase el gráfico 13). En el caso del valor de las importaciones, la caída sería mayor (25%) (véase el gráfico 14). La disminución del volumen importado alcanzaría el 18%, de modo que sería algo mayor que la que registrada en 2009 durante la crisis financiera mundial** y similar a las observadas en 1982, a comienzos de la crisis de la deuda externa, y en 1942, debido a la escasez resultante de la Segunda Guerra Mundial.

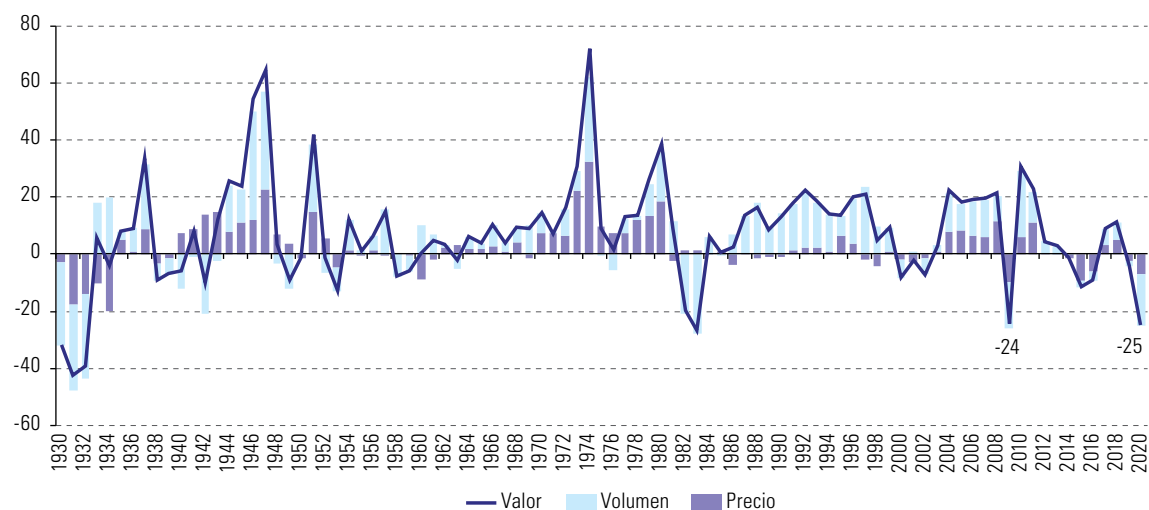
Gráfico 13 | América Latina y el Caribe: variación de las exportaciones de bienes según valor, volumen y precio, 1930-2019 y proyección para 2020
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información oficial de la balanza de pagos de los países (1980-2019) y series de exportaciones a precios corrientes y de índices de precios de la CEPAL (1930-1979).

Nota: Las cifras de 2020 son proyecciones de la CEPAL.

Gráfico 14 | América Latina y el Caribe: variación de las importaciones de bienes según valor, volumen y precio, 1930-2019 y proyección para 2020
(En porcentajes)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información oficial de la balanza de pagos de los países (1980-2019) y series de importaciones a precios corrientes y de índices de precios de la CEPAL (1930-1979).

Nota: Las cifras de 2020 son proyecciones de la CEPAL.

- **Las mayores contracciones de las exportaciones en 2020 corresponderían a las destinadas a los Estados Unidos (32%) y a la propia región (28%), en tanto que los envíos a China caerían solo un 4%** (véase el cuadro 13). Dada la composición de las exportaciones a esos mercados (principalmente manufacturas en los dos primeros casos y materias primas en el tercero), **el efecto neto intensificaría la reprimarización de la canasta de exportaciones regional**. Por su parte, **las importaciones procedentes de todos los principales proveedores de la región tendrán caídas considerables**.

Cuadro 13 | América Latina y el Caribe: variación proyectada del valor del comercio de bienes, por socios, 2020
(En porcentajes)

	Exportaciones	Importaciones
Mundo	-23	-25
Estados Unidos	-32	-32
Unión Europea	-16	-24
Asia	-7	-23
China	-4	-27
Resto de Asia	-11	-19
América Latina y el Caribe	-28	-29

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

- De forma coherente con la evolución de las exportaciones por destino, **se proyecta que las reducciones más fuertes se registren en los valores de los envíos de minería y petróleo y en los de manufacturas** (véase el cuadro 14). En el primer caso, ello se debe en parte a una importante caída de los precios, mientras que en el segundo obedece fundamentalmente a los menores volúmenes exportados. **Por su parte, los envíos agrícolas y agropecuarios serían los más resilientes, con un alza proyectada de su valor del 2%. Las importaciones registrarán caídas considerables en todos los rubros**, si bien la mayor contracción corresponderá a las compras de combustibles, debido a la disminución de los precios.

Cuadro 14 | América Latina y el Caribe: variación proyectada del valor del comercio de bienes, por sectores, 2020
(En porcentajes)

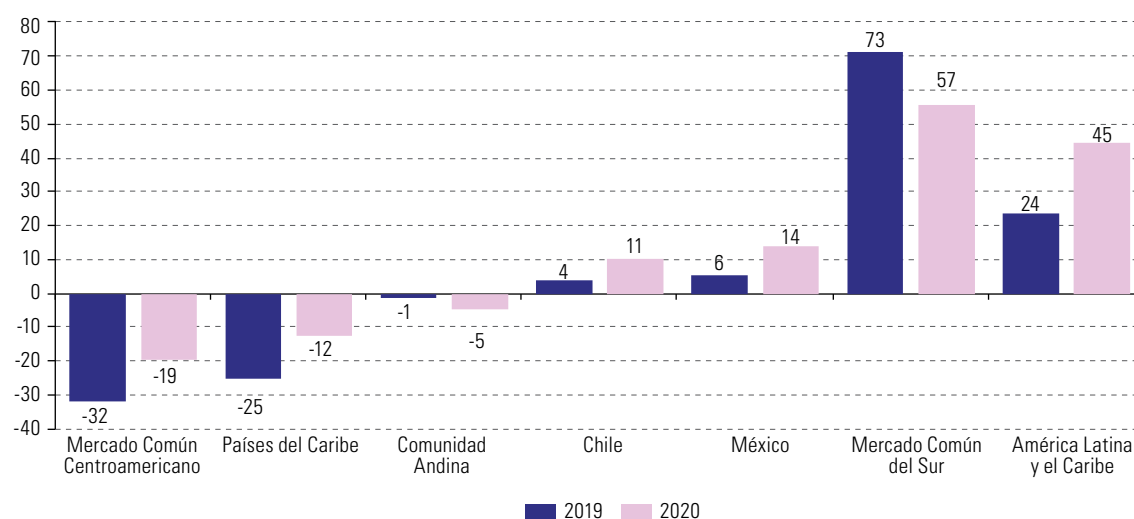
	Variación proyectada
Exportaciones totales	-23
Productos agrícolas y agropecuarios	2
Minería y petróleo	-33
Manufacturas	-25
Importaciones totales	-25
Bienes de capital	-19
Insumos intermedios	-21
Bienes de consumo	-22
Combustibles	-44

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de los bancos centrales, servicios de aduanas e institutos de estadística de los países.

- **Dado que las importaciones caerían más que las exportaciones, la región llegaría a un saldo comercial superavitario de poco más de 45.000 millones de dólares en 2020.** Este se concentrará en los países del Mercado Común del Sur (MERCOSUR), Chile y México. Para la Comunidad Andina, cuyos miembros han sido fuertemente golpeados por la caída de los precios del petróleo y los minerales, se proyecta un déficit comercial de poco más de 4.500 millones de dólares. Por su parte, en los países centroamericanos y del Caribe se produciría una reducción importante del déficit respecto de 2019 (véase el gráfico 15).
- El pronunciado descenso de la demanda en la región redundaría en el **desplome del comercio intrarregional en todos los rubros**, casi todos los cuales presentarían disminuciones en porcentajes de dos dígitos (véase el cuadro 15). Esta situación repercutirá sobre todo en las exportaciones de manufacturas, cuyo principal mercado para casi todos los países es la propia región.

Gráfico 15 | América Latina y el Caribe (agrupaciones y países seleccionados): saldo comercial de bienes, 2019 y proyección para 2020

(En miles de millones de dólares)



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información oficial.

Cuadro 15 | América Latina y el Caribe: estructura del comercio intrarregional y coeficiente de comercio intrarregional medido por exportaciones, promedio 2018-2019, y variación proyectada para 2020^a

(En millones de dólares y porcentajes)

Sector	Exportaciones intrarregionales	Participación	Coeficiente de comercio intrarregional	Variación proyectada para 2020
Agricultura, caza y pesca	13 521	8	10	-2
Petróleo y minería	25 998	16	19	-15
Alimentos, bebidas y tabaco	19 139	12	18	-14
Madera, celulosa y papel	5 784	4	20	-12
Textiles, confecciones y calzado	6 804	4	22	-18
Química y petroquímica	16 505	10	41	-24
Medicamentos	3 282	2	59	-10
Caucho y plástico	4 643	3	35	-24
Minerales no metálicos	2 408	1	33	-23
Metales y productos derivados	14 383	9	9	-27
Maquinaria y equipos	16 829	10	8	-24
Automotor	23 418	14	16	-45
Otras manufacturas	11 820	7	13	-33
Total	164 535	100	15	-28

Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de UN Comtrade - Base de Datos Estadísticos sobre el Comercio Internacional.

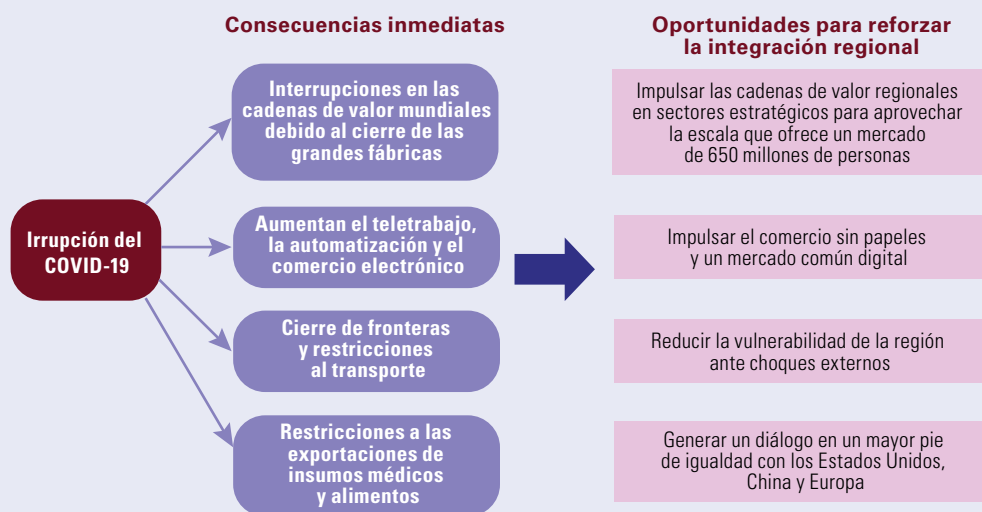
^a Se excluye la información de la industria maquiladora de Centroamérica.

- **La evolución esperada del comercio exterior regional en 2020 apunta a una pérdida de capacidades productivas en el sector industrial**, asociada a la fuerte contracción de las exportaciones manufactureras y de las importaciones de bienes de capital e insumos intermedios. Esto hará más difícil transitar hacia una especialización exportadora más intensiva en conocimientos a medida que la región emerja de la actual crisis.

F. Ante una economía mundial más incierta y regionalizada, es imperativo profundizar la integración regional

- La pandemia probablemente reforzará dos tendencias interrelacionadas que ya se perfilaban previamente. La primera es una tendencia hacia un menor nivel de interdependencia productiva, comercial y tecnológica entre las principales economías mundiales, en particular entre los Estados Unidos y Europa, por una parte, y China, por la otra. La segunda es una tendencia hacia un comercio mundial con un menor nivel de apertura, más permeado por consideraciones geopolíticas y de seguridad nacional, con una mayor presencia de conflictos y con una institucionalidad multilateral debilitada. El resultado neto no sería una reversión de la globalización, sino una economía mundial más regionalizada, organizada en torno a tres grandes polos productivos: América del Norte, Europa y Asia Oriental y Sudoriental.
- En un contexto mundial de mayor regionalización de la producción, la integración regional debe desempeñar un papel clave en las estrategias de salida de la crisis en América Latina y el Caribe. Avanzar hacia el establecimiento de un mercado integrado de 650 millones de personas proporcionaría a los países de la región un importante seguro frente a perturbaciones de oferta o de demanda generadas fuera de ella. Asimismo, **permitiría alcanzar la escala requerida para fortalecer industrias estratégicas** como la farmacéutica y la de insumos médicos y promover redes de producción e investigación compartida entre países y subregiones. Esto **reduciría la vulnerabilidad de la región ante interrupciones del suministro** como las producidas durante la pandemia (CEPAL, 2020c). Por otra parte, en un escenario de debilitamiento del multilateralismo, una mayor concertación regional es indispensable para **generar un diálogo en un mayor pie de igualdad con los principales actores de la economía mundial** (véase el diagrama 1).

Diagrama 1 | Consecuencias inmediatas del COVID-19 en el comercio y la producción, y oportunidades para reforzar la integración regional en América Latina y el Caribe



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL).

- Para avanzar en la integración regional, la infraestructura y la logística deben formar parte de los paquetes de medidas de recuperación económica. Además de su relevante participación directa en el PIB y el empleo, son fundamentales para la producción de todos los bienes y servicios, el suministro de alimentos y servicios esenciales, y la competitividad internacional del comercio.
- En el actual contexto de elevada incertidumbre, los países de la región deben emprender acciones que les permitan reducir sus costos logísticos internos y generar servicios de valor agregado para mantener su competitividad. Estas medidas deben implementarse de forma coordinada con otras medidas económicas y sociales, para favorecer una recuperación económica con beneficios sociales y ambientales. En el caso de la infraestructura y la logística, son cruciales cuatro elementos: inversión, interoperabilidad, integración regional e inteligencia logística.

■ **La coyuntura actual es particularmente adversa para las iniciativas de profundización de la integración regional.** A las diferencias de visión estratégica ya conocidas se suma ahora una crisis sanitaria, económica y social de enormes proporciones y el riesgo de una profunda crisis alimentaria. **Sin embargo, no es posible ignorar las señales que apuntan a una marcada reconfiguración de la geografía económica global,** y específicamente a una mayor relevancia de las regiones. Por ende, **profundizar la integración regional debe ser un componente esencial de cualquier estrategia de salida de la crisis.** Dado el rol crucial que el mercado regional tiene para las exportaciones de manufacturas y para las pequeñas y medianas empresas (pymes) exportadoras, emprender acciones coordinadas que propendan a la reactivación del comercio intrarregional permitirá **atenuar la pérdida de tejido empresarial y la reprimarización de la estructura productiva y las exportaciones con que América Latina y el Caribe emergerá de la pandemia.**

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Este *Informe Especial* es el sexto de una serie que elabora la Comisión Económica para América Latina y el Caribe (CEPAL) sobre la evolución y los efectos de la pandemia de COVID-19 en América Latina y el Caribe. Sus análisis económicos y sociales se actualizarán a medida que surja información relevante. La Secretaría Ejecutiva de la CEPAL, Alicia Bárcena, dirigió la elaboración de este Informe, con el apoyo técnico de la Oficina del Secretario Ejecutivo Adjunto, Mario Cimoli, y de la División de Comercio Internacional e Integración de la CEPAL.

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CEPAL

Comisión Económica para América Latina y el Caribe (CEPAL)
Economic Commission for Latin America and the Caribbean (ECLAC)
www.cepal.org



ALCALDÍA MAYOR
DE BOGOTÁ D.C.
SECRETARÍA DE HÁBITAT

SOLICITUD DE TRÁMITE

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario

FECHA DE LA SOLICITUD:	24/12/2020		
DEPENDENCIA SOLICITANTE:	Subdirección Administrativa		
NÚMERO DE PROCESO - Sistema de Información para la Planeación Interna - SIPI			
Número del Certificado de Disponibilidad Presupuestal	1168	Fecha: 27/08/2020	
FUENTE DE LOS RECURSOS (Seleccione con una X, para inversión indique el número del proyecto)			
Funcionamiento		Inversión	No. de Proyecto

1. TRÁMITE SOLICITADO - Modificación contractual:

Contrato No.	57318	Fecha: 27/10/2020
Clase de Contrato	Orden de Compra	
Objeto	ADQUISICIÓN DE EQUIPOS TECNOLÓGICOS PARA LA SECRETARÍA DISTRITAL DEL HÁBITAT - MONITORES	
Nombre del contratista	UT SERTAL CCE TECNOLOGÍA	
Valor inicial del contrato	\$23.289.144,00	
Plazo de ejecución inicial	40 días	
Nombre del supervisor del contrato	MILDRED CONSTANZA ACUÑA DIAZ	
Cargo del supervisor del contrato	Subdirectora Administrativa	

1.1 CLASE DE MODIFICACIÓN:

(Señale con una X el trámite solicitado (incluya la información requerida y los documentos que se adjuntan))

Adición No. ____	Valor de la adición			
Prórroga No. <u>1</u>	Plazo de la prórroga	60 días		
Suspensión No. ____	Desde		Hasta	
Terminación anticipada	A partir de			
Cesión	A partir de			
Nombre del cesionario				

SOLICITUD DE TRÁMITE

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario

Otro	Indique cual	

Descripción de la necesidad o Justificación de la modificación contractual solicitada: (describa de manera específica la necesidad que se pretende satisfacer con la contratación, exponiendo las razones por las cuales se justifica la modificación del contrato)

Para la Secretaría Distrital del Hábitat **es conveniente** la modificación del contrato con el objeto antes registrado, debido a la situación expuesta por el proveedor SERTAL CCE TECNOLOGÍA, el cual informa la novedad presentada por el fabricante HP, el cual envió un comunicado indicando el desabastecimiento a nivel mundial de insumos para la configuración de los equipos adquiridos mediante la Orden de Compra No.57318, razón por la cual es necesario prorrogar la fecha de entrega de estos bienes, para garantizar el cumplimiento de las obligaciones establecidas en el Acuerdo Marco de Precios “Compra o alquiler de Equipos Tecnológicos y Periféricos” número CCENEG-018-1-2019.

La necesidad concreta que la Secretaría Distrital del Hábitat pretende satisfacer es prorrogar la orden de compra mencionada anteriormente por sesenta (60) días, esto es, hasta el 23 de febrero de 2021, razón por la cual el requerimiento se encuentra incluido dentro del Plan Anual de Adquisiciones aprobado para esta vigencia.

En caso de no efectuarse esta contratación podría afectar el cumplimiento del desarrollo de las actividades de las diferentes dependencias, debido al aumento en el recurso humano para cumplir con la misionalidad de la SDHT. Por tal motivo los equipos de cómputo que dispone no han sido suficientes para satisfacer esta necesidad.

Meta del Proyecto

No. del proyecto de inversión	Nombre del proyecto de inversión	Meta del proyecto de inversión
N/A	N/A	N/A

PRODUCTO P.M.R.: (escriba el **Producto Metas Resultados**, formulado en el proyecto de inversión, en el que se enmarca la solicitud de modificación contractual)

2. Trámite Postcontractual – Liquidación de Contrato	
Contrato No.	
Objeto:	
Nombre del contratista	



ALCALDÍA MAYOR
DE BOGOTÁ D.C.
SECRETARÍA DE HABITAT

SOLICITUD DE TRÁMITE

Subsecretaría de Gestión Corporativa y Control Interno Disciplinario

3. INFORMACION DEL SOLICITANTE:

Nombre	MILDRED CONSTANZA ACUÑA DIAZ
Cargo	Subdirectora Administrativa
Dependencia	Subdirección Administrativa
Firma	

4. Anexos: (Relacione los documentos que se adjuntan de acuerdo con lo establecido en el Manual de Contratación)

- Anexo No.1
- Anexo No.2
- Anexo No.3
- Anexo No.4
- Anexo No.5
- Anexo No.6

5. RADICACION SUBSECRETARÍA DE GESTIÓN CORPORATIVA Y CID:

Fecha y hora de recibo:	
Recibido por:	

MODIFICACIÓN DE ÓRDENES DE COMPRA

Tienda Virtual del Estado Colombiano

Id Solicitud:	201868
Número de orden de compra a modificar:	57318

Entidad compradora:	Secretaría Distrital del Habitat
Nombre del solicitante:	Nelson Javier VÁSQUEZ TORRES
Proveedor:	UT SERTAL CCE TECNOLOGÍA
Mecanismo de agregación de demanda:	Compra de ETP II

Tipo de Solicitud:	Modificación de la Orden de Compra
Fecha:	2020-12-29 09:22:36

Campos a Actualizar

Campo	Valor Actual	Nuevo Valor
Fecha de vencimiento	2021-01-04	2021-02-23

Cuentas asociadas

Id	Nombre	Código	Segmento 1	Segmento 2
53854	CDP	1168	1168	

Artículos actuales

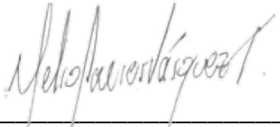
No	Artículo	Cantidad	Unidad	Precio	Cuenta	Total

1	etc02--lote1.6- ETP AIO 23.8pulgadas WIN 10 PRO 64 BITS 4100 AVANZADA NA SSD 500 GB PCIe 16 GB INTERNA Zona 1	5.0	Unidad	2879867.00	1168	14399335.00
2	etc02--lote1.6- ACCESORIO Monitor de 27pulgadas NA NA NA NA NA NA NA NA Zona 1	1.0	Unidad	685043.00	1168	685043.00
3	etc02--lote1.6- ACCESORIO Monitor de 23.8pulgadas NA NA NA NA NA NA NA NA Zona 1	8.0	Unidad	542442.00	1168	4339536.00
4	etc02--lote1.6- SERVICIO Garantía extendida Computo 2 años Valor unitario por ETP NA NA NA NA NA NA Zona 1	5.0	Unidad	29359.00	1168	146795.00
5	etc02--IVA	1.0	Unidad	3718435.00	1168	3718435.00

Artículos editados y/o agregados

Tipo	No	Artículo	Cantidad	Unidad	Precio	Cuenta	Total

Detalle o justificación de la aclaración
Teniendo en cuenta las razones expuestas por UT SERTAL CCE TECNOLOGIA, se estima procedente prorrogar la fecha de vencimiento de la orden de compra en 60 días, hasta el 23 de febrero de 2021.


 Firma ordenador del gasto
 Nombre: Nelson Javier Vasquez Torres
 Documento: 79.590.076


 Firma de proveedor
 Nombre: Rodolfo Antonio Albarracín Medina
 Documento: 7.217.866