Americas Technology: Hardware: C3Q26 PC market share review: Industry unit shipment declines 20% year-over-year

Katherine Murphy
+1(212)902-1151 | katherine.a.murphy@gs.com
Goldman Sachs & Co. LLC

Michael Ng, CFA
+1(212)902-8618 | michael.ng@gs.com
Goldman Sachs & Co. LLC

Lizzy Xie
+1(212)357-3206 | lizzy.xie@gs.com
Goldman Sachs & Co. LLC

BOTTOM LINE: IDC released preliminary estimates for 3Q26 PC shipments (including workstations) of 62.7 mn, down -20% year-over-year, the second consecutive quarter of declines. IDC attributes the decline to ongoing component shortages (memory, storage) as well as inventory pull-in earlier in the year. IDC expects channel concerns over high inventory and soft demand (from higher ASPs) could bring near-term promotional activity, though pricing is expected to remain well above year-ago levels. Worsening macro conditions could further pressure demand for the remainder of 2026 and 2027.

3Q26 vendor market share: Apple and ASUS declines were softer than the overall market, while DELL, HP, and Lenovo lost share. Specifically, IDC estimates that Apple shipments declined -11% (9% share), ASUS shipments declined -9% (9% share), Lenovo shipments were down -23% (24% share), Dell shipments were down -25% (12% share), and HP units declined -31% (17% share). IDC attributes market share loss at Lenovo, HP, and Dell to impacts from pull-in earlier in the year.

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Exhibit 1: IDC estimates 3Q26 PC shipments (including workstations) of 62.7 mn, marking ~20% decline YoY
PC units by vendor (mn)

(in millions)	1Q24	2Q24	3Q24	4Q24	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26	3Q26
Vendor, Global (Includes Workstations)											
Units											
Apple	4.8	5.1	6.0	7.1	5.7	6.1	6.7	7.2	6.3	7.2	5.9
ASUS	3.6	4.2	5.3	4.9	4.1	5.0	6.0	5.5	4.8	5.0	5.5
Dell Technologies	9.3	10.1	9.8	9.9	9.6	9.8	10.1	11.7	10.3	9.3	7.6
HP Inc	12.0	13.7	13.6	13.7	12.8	14.3	15.0	15.4	12.1	13.0	10.3
Lenovo	13.7	14.7	16.5	16.9	15.2	17.0	19.3	19.4	16.5	16.7	14.9
Acer											
Others	16.7	16.3	19.8	19.1	18.6	19.6	21.4	21.3	17.8	17.9	18.4
Total PC Units	**60.2**	**64.2**	**71.0**	**71.6**	**65.9**	**71.7**	**78.5**	**80.5**	**67.9**	**69.0**	**62.7**
Units market share											
Apple	8%	8%	8%	10%	9%	9%	9%	9%	9%	10%	9%
ASUS	6%	7%	8%	7%	6%	7%	8%	7%	7%	7%	9%
Dell Technologies	15%	16%	14%	14%	14%	14%	13%	15%	15%	13%	12%
HP Inc	20%	21%	19%	19%	19%	20%	19%	19%	18%	19%	17%
Lenovo	23%	23%	23%	24%	23%	24%	25%	24%	24%	24%	24%
Acer											
Others	28%	25%	28%	27%	28%	27%	27%	26%	26%	26%	29%
Year-over-year change											
Units											
Apple	14%	8%	-15%	19%	19%	19%	12%	1%	11%	17%	-11%
ASUS	-5%	10%	7%	15%	13%	19%	12%	12%	18%	0%	-9%
Dell Technologies	-2%	-2%	-4%	0%	3%	-3%	3%	18%	8%	-5%	-25%
HP Inc	0%	2%	0%	-2%	6%	4%	10%	12%	-5%	-9%	-31%
Lenovo	8%	4%	3%	5%	11%	15%	17%	15%	9%	-2%	-23%
Acer											
Others	26%	29%	6%	9%	11%	20%	8%	12%	-4%	-9%	-14%
Total PC Units	**2%**	**2%**	**1%**	**6%**	**10%**	**12%**	**11%**	**12%**	**3%**	**-4%**	**-20%**
Quarter-over-Quarter growth											
Units											
Apple	-19%	7%	17%	18%	-20%	7%	10%	7%	-12%	13%	-17%
ASUS	-15%	17%	26%	-8%	-17%	23%	19%	-8%	-13%	5%	9%
Dell Technologies	-6%	9%	-2%	1%	-4%	2%	3%	16%	-12%	-10%	-18%
HP Inc	-14%	14%	-1%	1%	-7%	12%	5%	3%	-21%	7%	-21%
Lenovo	-15%	7%	12%	2%	-10%	11%	14%	0%	-15%	1%	-10%
Acer											
Total PC Units	**-11%**	**7%**	**11%**	**1%**	**-8%**	**9%**	**9%**	**3%**	**-16%**	**2%**	**-9%**

PC shipments include desktops, notebooks, and workstations. Totals may be affected by rounding.

Source: IDC