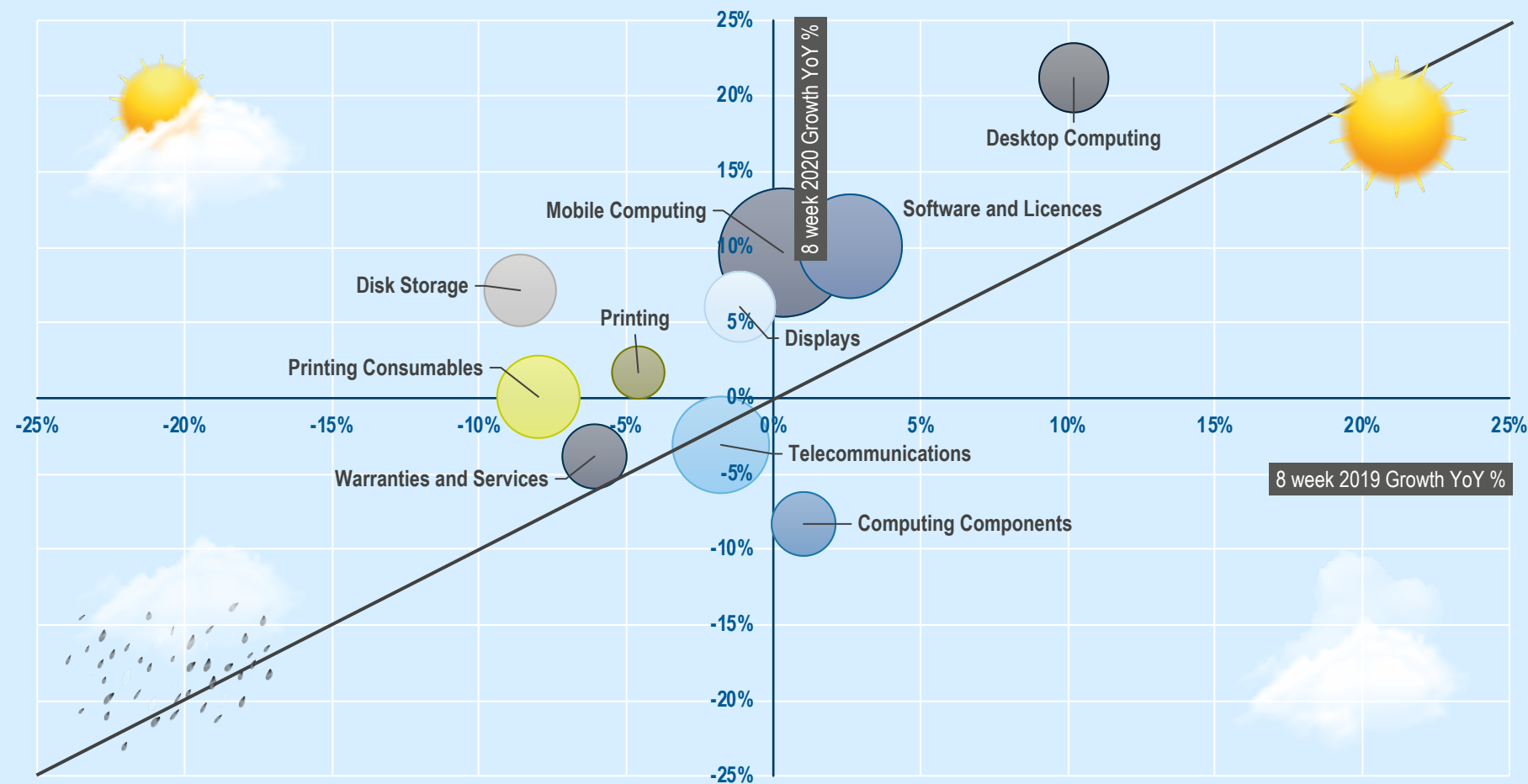# IT Industry Update

25 March 2020
CoronaWatch

LARGEST INDUSTRY SECTORS: MOVED POSITIVELY (EXCEPT COMPONENTS)

% Change in sales through IT Distribution in €: 8 Weeks to 15/3/20 vs Same Period 2019 growth

Industry Sector	8 weeks 2019	8 weeks 2020
Mobile Computing	0%	10%
Software and Licences	3%	10%
Telecommunications	-2%	-3%
Printing Consumables	-8%	0%
Disk Storage	-9%	7%
Displays	-1%	6%
Desktop Computing	10%	21%
Warranties and Services	-6%	-4%
Computing Components	1%	-8%
Printing	-5%	2%
Networking Systems	-3%	1%
Audio-Video Systems	30%	57%
Computing Accessories	8%	9%
Server Computing	-18%	-15%
Data Center Networking and Security	-20%	-17%
Wireless Networking	-2%	7%
Power Equipment	-7%	7%
Wearable Devices	26%	9%
Other Networking Equipment	1%	-5%
Connectivity	9%	4%
Removable Storage	-23%	-11%
Home and Garden	-7%	3%
Smart Home and Office	27%	9%
Unified Communications	-7%	0%
Scanner Imaging	-3%	-12%
Electronics	-24%	-22%
Games Consoles	-9%	24%
Tape Storage	-5%	6%
Security	-9%	7%
Terminals, Thin Clients and Points of Sales	-3%	-30%
Photo and Video Cameras	-16%	-8%
Security Devices	9%	12%
eHealth Devices	48%	24%
Other	41%	93%

CoronaWatch

LARGEST IT INDUSTRY SECTORS AND COUNTRIES IN WESTERN EUROPE

CONTEXT

Largest Industry Category WE

% Change in sales through IT Distribution in Euros - 8 weeks to March 15, 2020 vs same period

Sorted by largest industry sector and largest country. Displays top two categories (by revenue) within each Industry sector.
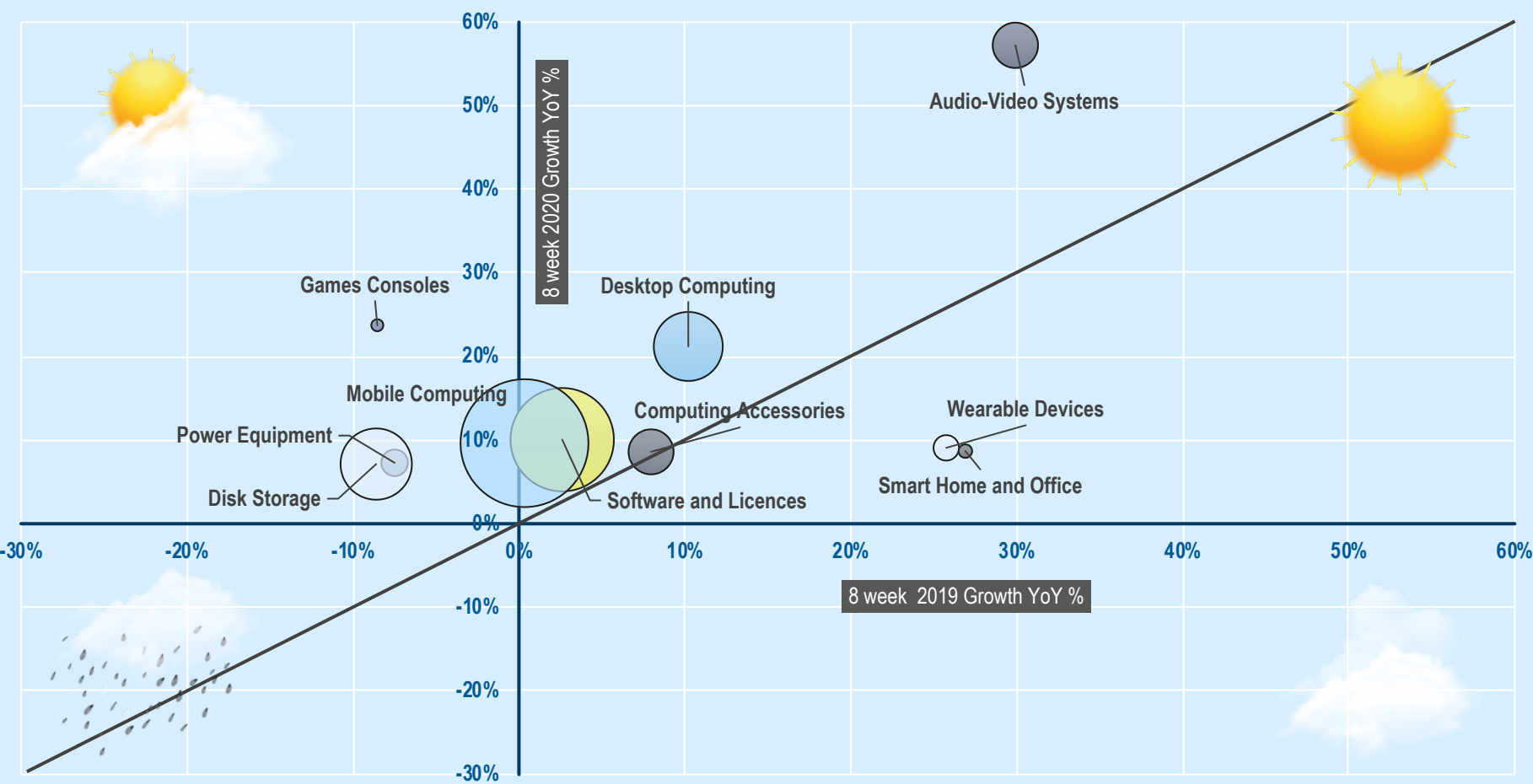
		Above	15%
		Inbetween	
		Below	-20%

Industry Sectors	Categories	Germany	UK & Ireland	Italy	France	Spain	Switzerland	Sweden	Austria	Belgium	Portugal	Denmark	Finland	Norway
Mobile Computing	Notebooks	18%	12%	9%	4%	12%	-3%	13%	36%	-12%	-2%	-17%	6%	11%
	Tablet PCs	26%	2%	-6%	-8%	19%	6%	-21%	34%	34%	-12%	58%	1%	-37%
Software and Licences	Office Applications Software	17%	-10%	6%	16%	6%	17%	8%	6%	6%	21%	14%	14%	4%
	Operating Systems Software	-3%	-10%	-2%	12%	15%	28%	21%	4%	17%	-24%	11%	36%	6%
Telecommunications	Smartphones	-17%	-13%	13%	0%	-4%	1%	-12%	-12%	-2%	6%	8%	4%	26%
	Telephony and Conference Systems	19%	49%	-4%	16%	5%	-25%	84%	47%	6%	-40%	146%	179%	115%
Printing Consumables	Ink Cartridges and Tanks	17%	-20%	-4%	-3%	18%	-17%	17%	11%	10%	32%	-7%	-15%	-21%
	Toner	9%	-7%	0%	14%	9%	-12%	-2%	7%	2%	0%	2%	7%	-8%
Disk Storage	Hard Disk Drives (HDDs)	5%	-20%	0%	-16%	-25%	15%	-6%	-12%	15%	63%	1%	-23%	-5%
	Solid State Drives (SSDs)	38%	6%	35%	10%	10%	9%	12%	0%	-45%	81%	-19%	12%	14%
Displays	Large Format Displays	10%	16%	-5%	7%	-2%	9%	22%	4%	52%	-5%	8%	35%	-7%
	Monitors	15%	23%	-7%	12%	27%	14%	5%	38%	-1%	10%	28%	14%	18%
Desktop Computing	Desktop Workstations (PC/Mac)	14%	22%	7%	29%	7%	28%	8%	43%	-7%	-25%	-4%	-20%	-55%
	Desktops	44%	27%	-6%	34%	27%	17%	6%	41%	26%	38%	-3%	21%	59%
Computing Components	Processors	25%	8%	0%	-14%	23%	66%	-17%	-10%	-55%	-9%	-14%	-14%	16%
	RAM Memory	-25%	-43%	-21%	-44%	-26%	-23%	-47%	-40%	-58%	-26%	-41%	-26%	-36%
Warranties and Services	Warranties and Services	-8%	-1%	7%	10%	-7%	-11%	-21%	-1%	-19%	-10%	-11%	-18%	-25%
Printing	All-In-One Inkjets	-3%	4%	1%	0%	10%	1%	34%	-9%	10%	12%	39%	1%	-1%
	All-in-One Lasers	-23%	-10%	-7%	-10%	2%	337%	12%	33%	16%	32%	-24%	-23%	-15%
Networking Systems	Network Routers	-17%	-31%	61%	-15%	75%	16%	2%	-20%	-17%	-26%	27%	-38%	-36%
	Network Switches	8%	0%	-9%	-3%	7%	-31%	4%	20%	-1%	-40%	26%	4%	-18%
Audio-Video Systems	Digital Media Players	-16%	-5%	-40%	-20%	4%	-19%	12%	-55%	-12%	-20%	22%	-21%	28%
	Headsets/Headphones and Microphones	125%	23%	292%	87%	114%	136%	27%	144%	108%	252%	-18%	163%	90%
Computing Accessories	Docking Stations	12%	23%	28%	13%	4%	24%	5%	20%	16%	-17%	21%	13%	13%
	Keyboards and Keypads	16%	-9%	-7%	4%	9%	20%	-20%	30%	11%	5%	6%	31%	2%
Server Computing	Integrated Systems	64%	-26%	-5%	-8%	46%	-22%	-52%	-96%	-41%	-50%	72%	-33%	-11%
	Servers (PC/Mac)	-25%	-15%	-14%	-9%	-17%	14%	-42%	-30%	-37%	16%	5%	-13%	-52%

CoronaWatch

FASTEST GROWING SECTORS: IMPACT ON HEADSETS, COMPUTING, GAMES

% Change in sales through IT Distribution in €: 8 Weeks to March 15, 2020 vs Same Period 2019

Industry Sector	8 weeks 2019	8 weeks 2020
Audio-Video Systems	30%	57%
eHealth Devices	48%	24%
Games Consoles	-9%	24%
Desktop Computing	10%	21%
Security Devices	9%	12%
Software and Licences	3%	10%
Mobile Computing	0%	10%
Wearable Devices	26%	9%
Smart Home and Office	27%	9%
Computing Accessories	8%	9%
Power Equipment	-7%	7%
Disk Storage	-9%	7%
Wireless Networking	-2%	7%
Security	-9%	7%
Displays	-1%	6%
Tape Storage	-5%	6%
Connectivity	9%	4%
Home and Garden	-7%	3%
Printing	-5%	2%
Networking Systems	-3%	1%
Unified Communications	-7%	0%
Printing Consumables	-8%	0%
Telecommunications	-2%	-3%
Warranties and Services	-6%	-4%
Other Networking Equipment	1%	-5%
Photo and Video Cameras	-16%	-8%
Computing Components	1%	-8%
Removable Storage	-23%	-11%
Scanner Imaging	-3%	-12%
Server Computing	-18%	-15%
Data Center Networking and Security	-20%	-17%
Electronics	-24%	-22%
Terminals, Thin Clients and Points of Sales	-3%	-30%
Others	41%	93%

CoronaWatch

TOP GROWTH IT INDUSTRY SECTORS AND COUNTIRES IN WESTERN AND EASTERN EUROPE

Top Growth Industry WE EE

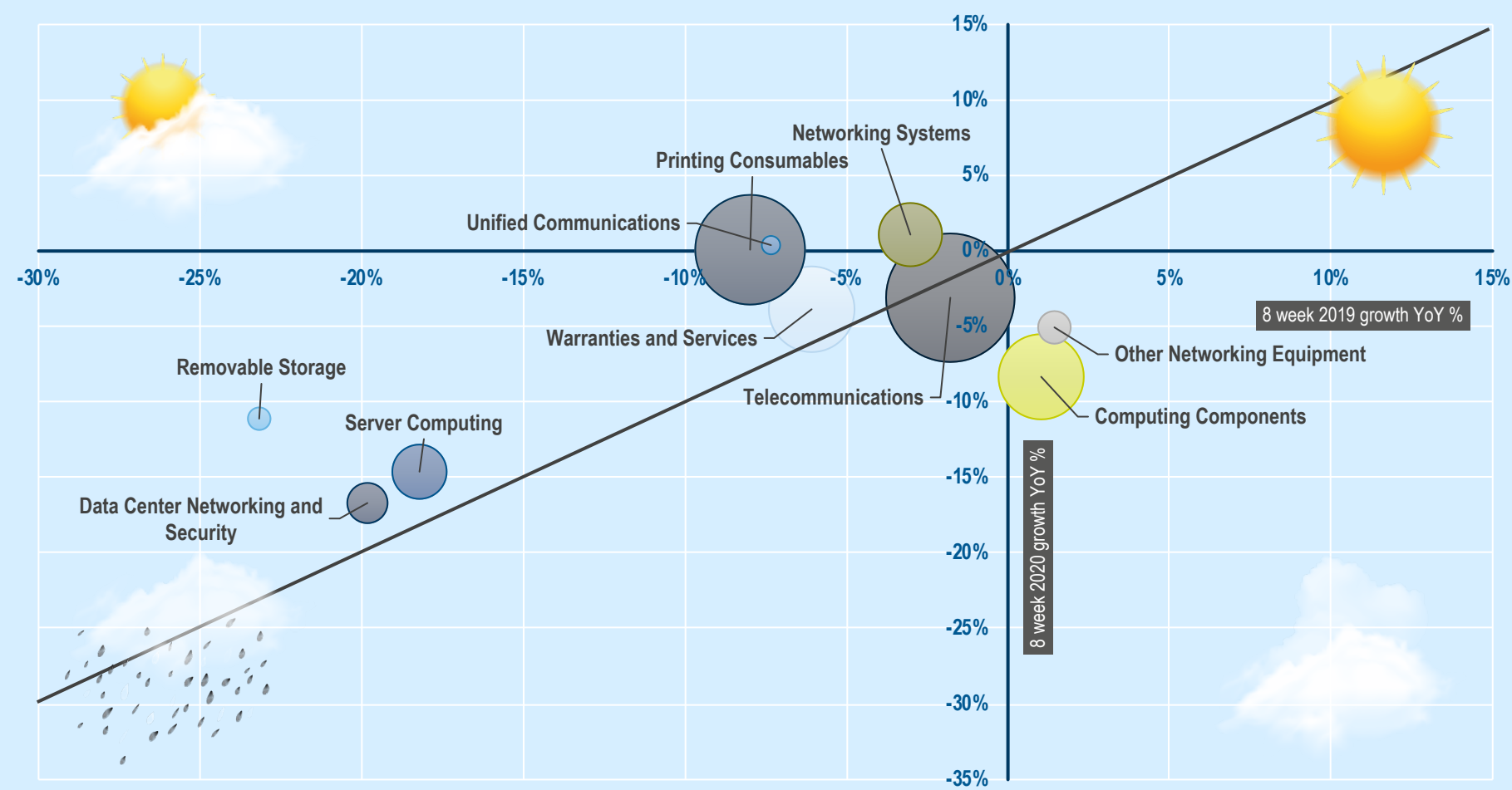**% Change in sales through IT Distribution in Euros - 8 weeks to March 15, 2020 vs same period**

Sorted by top growth industry sector and country growth

Industry Sector	WE	Germany	Finland	Italy	Switzerland	Spain	Portugal	France	Belgium	Austria	UK & Ireland	Denmark	Sweden	Norway	EE	Czech Republic	Russia	Slovakia	Poland	Baltics	Industry Sector Growth
Audio-Video Systems	79%	116%	200%	73%	54%	157%	45%	80%	91%	1%	-20%	4%	66%		22%	21%	188%	64%	57%		57%
Desktop Computing	40%	14%	-4%	18%	25%	32%	33%	21%	41%	26%	-3%	6%	26%		14%	17%	-43%	13%	-12%		21%
Software and Licences	14%	28%	23%	17%	28%	-14%	6%	46%	-23%	-9%	-2%	10%	-12%		-9%	75%	68%	20%	14%		10%
Mobile Computing	20%	5%	6%	0%	13%	-4%	1%	-4%	35%	11%	-12%	4%	3%		24%	-1%	14%	32%	-4%		10%
Wearable Devices	7%	26%	-7%	12%	85%	217%	2%	-13%	191%	-22%	-32%	22%	-72%		28%	-7%	47%	31%	8%		9%
Smart Home and Office	22%	7%	-17%	39%	56%	369%	-7%	-58%	19%	5%	3%	-48%	3%		128%	365%	-18%	234%	547%		9%
Computing Accessories	15%	28%	-3%	13%	0%	2%	2%	12%	22%	5%	19%	-3%	0%		17%	15%	32%	7%	5%		9%
Power Equipment	31%	-4%	-7%	11%	-7%	-14%	-1%	8%	19%	2%	-6%	-11%	-38%		3%	11%	10%	4%	-9%		7%
Disk Storage	24%	7%	8%	5%	-9%	66%	7%	-22%	-19%	-7%	-9%	-15%	-14%		4%	16%	37%	3%	26%		7%
Wireless Networking	23%	8%	2%	-8%	-16%	9%	11%	10%	0%	16%	-23%	3%	-27%		12%	-30%	22%	72%	12%		7%
Displays	11%	15%	3%	4%	25%	-6%	5%	2%	24%	8%	7%	-9%	2%		26%	-18%	-19%	12%	9%		6%
Connectivity	3%	12%	-12%	11%	34%	26%	7%	-13%	-4%	2%	8%	-3%	8%		17%	14%	11%	-4%	-9%		4%
Printing	-10%	-9%	-5%	107%	1%	25%	-2%	-6%	4%	-2%	-9%	20%	-18%		-1%	12%	-13%	-18%	3%		2%
Networking Systems	0%	-4%	9%	-23%	24%	-37%	-5%	-2%	12%	-8%	26%	3%	-22%		16%	22%	-41%	9%	11%		1%
Unified Communications	-1%	106%	71%	-25%	-24%	155%	10%	-24%	16%	-14%	90%	-39%	-33%		-5%	19%	-37%	-19%	-46%		0%
Printing Consumables	12%	2%	-2%	-13%	12%	16%	3%	3%	9%	-13%	-2%	8%	-14%		-12%	-7%	10%	2%	-75%		0%
Telecommunications	-16%	6%	11%	0%	-4%	5%	-4%	-3%	-12%	-14%	10%	-11%	27%		40%	18%	-4%	-5%	7%		-3%
Warranties and Services	-8%	-18%	7%	-11%	-7%	-10%	10%	-19%	-1%	-1%	-11%	-21%	-25%		-30%	12%	-45%	-5%	17%		-4%
Other Networking Equipment	15%	-1%	-19%	-17%	-35%	-37%	-3%	-21%	-5%	-9%	-17%	-23%	-45%		57%	18%	-65%	-6%	-13%		-5%
Computing Components	6%	-20%	-14%	-2%	-9%	-12%	-25%	-52%	-16%	-28%	-26%	-28%	-10%		32%	13%	27%	-2%	25%		-8%
Removable Storage	10%	-10%	-20%	12%	-39%	-33%	-32%	-27%	-28%	-18%	14%	62%	-17%		26%	-29%	-2%	12%	-1%		-11%
Scanner Imaging	10%	29%	-19%	-3%	-8%	7%	-10%	-42%	-1%	8%	-18%	-35%	56%		-33%	-56%	-90%	-23%	70%		-12%
Server Computing	-28%	-15%	-14%	10%	-15%	-15%	-13%	-35%	-42%	-22%	10%	-43%	-43%		-6%	32%	-10%	-11%	-33%		-15%
Data Center Networking and Security	-11%	-39%	2%	-44%	-46%	-24%	-34%	4%	-46%	-21%	-9%	17%	-52%		-7%	40%	245%	-6%	-61%		-17%
Country Growth	11%	10%	10%	9%	9%	7%	4%	2%	1%	-2%	-3%	-3%	-5%		15%	14%	11%	11%	0%		

Above		15%
Inbetween		
Below		-20%

CoronaWatch

FASTEST DECLINING SECTORS: POOR START TO THE YEAR FOR INFRASTRUCTURE

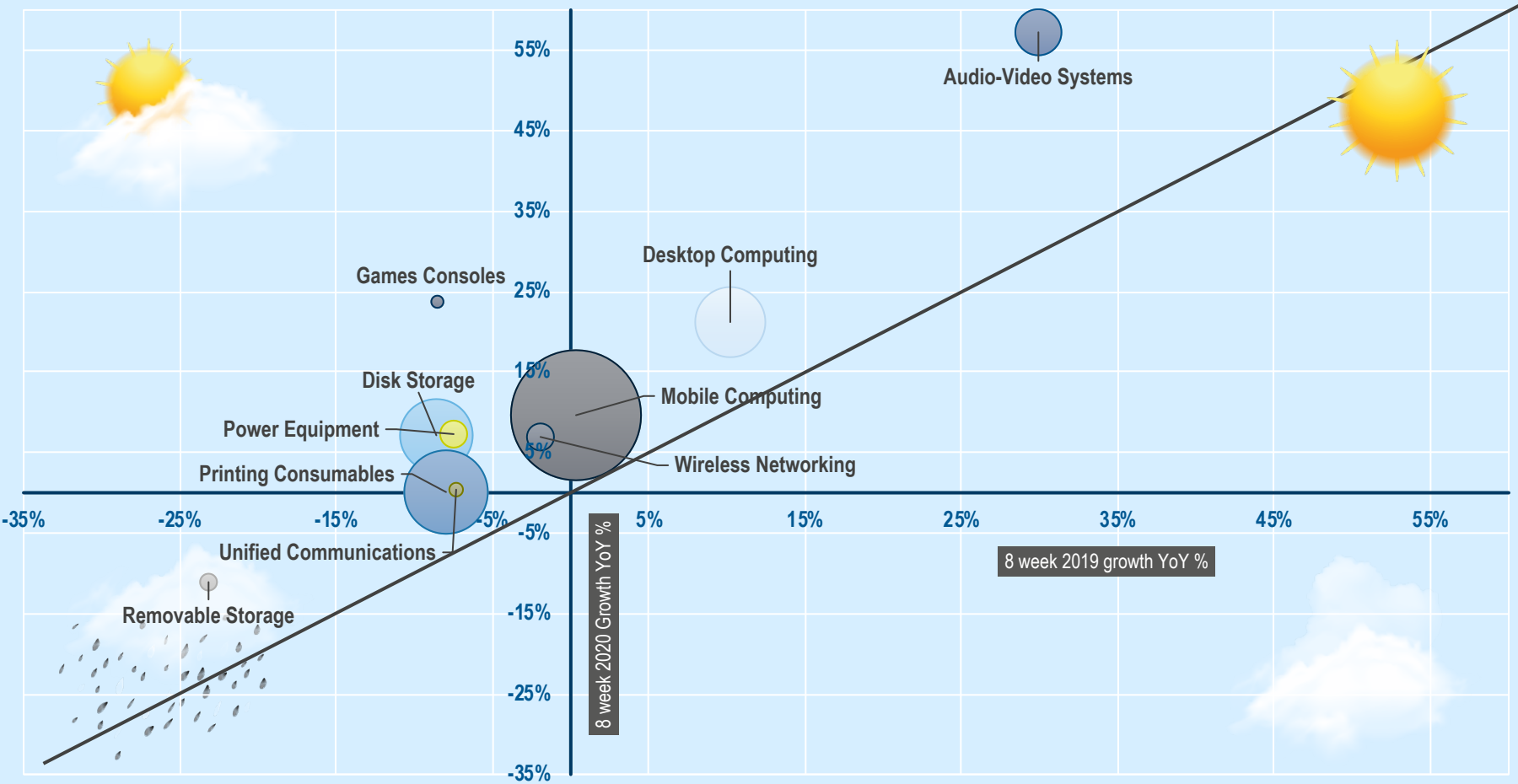## % Change in sales through IT Distribution in €: 8 Weeks to March 15, 2020 vs Same Period 2019

Industry Sector	8 weeks 2019	8 weeks 2020
Terminals, Thin Clients and Points of Sales	-3%	-30%
Electronics	-24%	-22%
Data Center Networking and Security	-20%	-17%
Server Computing	-18%	-15%
Scanner Imaging	-3%	-12%
Removable Storage	-23%	-11%
Computing Components	1%	-8%
Photo and Video Cameras	-16%	-8%
Other Networking Equipment	1%	-5%
Warranties and Services	-6%	-4%
Telecommunications	-2%	-3%
Printing Consumables	-8%	0%
Unified Communications	-7%	0%
Networking Systems	-3%	1%
Printing	-5%	2%
Home and Garden	-7%	3%
Connectivity	9%	4%
Tape Storage	-5%	6%
Displays	-1%	6%
Security	-9%	7%
Wireless Networking	-2%	7%
Disk Storage	-9%	7%
Power Equipment	-7%	7%
Computing Accessories	8%	9%
Smart Home and Office	27%	9%
Wearable Devices	26%	9%
Mobile Computing	0%	10%
Software and Licences	3%	10%
Security Devices	9%	12%
Desktop Computing	10%	21%
Games Consoles	-9%	24%
eHealth Devices	48%	24%
Audio-Video Systems	30%	57%
Other	41%	93%

CoronaWatch

% Change in sales through IT Distribution in €: 8 weeks to March 15, 2020 vs same period 2019

CONTEXT

Audio-Video Systems

Desktop Computing

Games Consoles

Disk Storage

Power Equipment

Printing Consumables

Mobile Computing

Wireless Networking

Unified Communications

Removable Storage

8 week 2019 growth YoY %

8 week 2020 Growth YoY %

55%
45%
35%
25%
15%
5%
-5%
-15%
-25%
-35%

-35% -25% -15% -5% 5% 15% 25% 35% 45% 55%

Industry Sector	8 weeks 2019	8 weeks 2020
Games Consoles	-9%	24%
Audio-Video Systems	30%	57%
Disk Storage	-9%	7%
Security	-9%	7%
Power Equipment	-7%	7%
Removable Storage	-23%	-11%
Tape Storage	-5%	6%
Desktop Computing	10%	21%
Home and Garden	-7%	3%
Mobile Computing	0%	10%
Wireless Networking	-2%	7%
Printing Consumables	-8%	0%
Photo and Video Cameras	-16%	-8%
Unified Communications	-7%	0%
Software and Licences	3%	10%
Displays	-1%	6%
Printing	-5%	2%
Networking Systems	-3%	1%
Server Computing	-18%	-15%
Data Center Networking and Security	-20%	-17%
Security Devices	9%	12%
Warranties and Services	-6%	-4%
Electronics	-24%	-22%
Computing Accessories	8%	9%
Telecommunications	-2%	-3%
Connectivity	9%	4%
Other Networking Equipment	1%	-5%
Scanner Imaging	-3%	-12%
Computing Components	1%	-8%
Wearable Devices	26%	9%
Smart Home and Office	27%	9%
eHealth Devices	48%	24%
Terminals, Thin Clients and Points of Sales	-3%	-30%
Others	41%	93%