

IT Industry Update

21st October 2020 CONTEXT Weekly IT Industry Forum





01

TOP TREND REPORTS TO WEEK 41

02

Q4 GUIDANCE

03

GERMANY INSIGHT – AMANUEL DAG, COUNTRY MANAGER DACH

WEEKLY REPORTS



01

REVENUE INDEX

4 week rolling revenue trends, revenue of base 100 is full year 2019 *4 / 52 , predictive indications, by country and region

02

REVENUE TRENDS

4 week rolling revenue % growth/decline trends compared to prior year, by country and region

03

SECTOR/CATEGORY WEATHER MAPS

4 week rolling revenue % growth/decline trends compared to prior year, plotted in 4 quadrants, Europe only (detailed report has country data)

04

CHANNEL HEALTH

4 week rolling revenue % growth/decline trends compared to prior year, in 3 business & 2 consumer channels, Europe only (detailed report has country data)

MONTHLY/QUARTERLY REPORTS



01

MONTHLY/QUARTERLY REVIEW

Month/quarter actual trends by country, category and vendor compared to prior year

02

QUARTERLY GUIDANCE

Guidance for the current quarter by business area compared to prior year and previous quarter

03

PRODUCT PRICE INDICES/WEEKS OF STOCK

For selected categories: 1) Average purchase price indices 2) Weeks of stock compared to sales

04

RESELLER METRICS

Reseller numbers showing active resellers sold to by distribution in each monthly period

EDUCATION – HUGE DRIVER OF GROWTH ACROSS EUROPE – 1.2BN€ EXCL GERMANY





Acceleration of huge 5 year IT investment plan Ifor schools aunched in May 2019, of which little has so far been spent



Laptops and tablets for disadvantaged children who have to work from home (May-Sept 2020) 125mn€



165mn€ on IT equipment and **400mn€** for internet access for schools (March/April 2020 and May 2020)



91mn€ on IT in schools (Sept 2020)



150,000 PC's for Andalucia, **350,000** for Catalonia totalling **260mn**€ (June 2020)

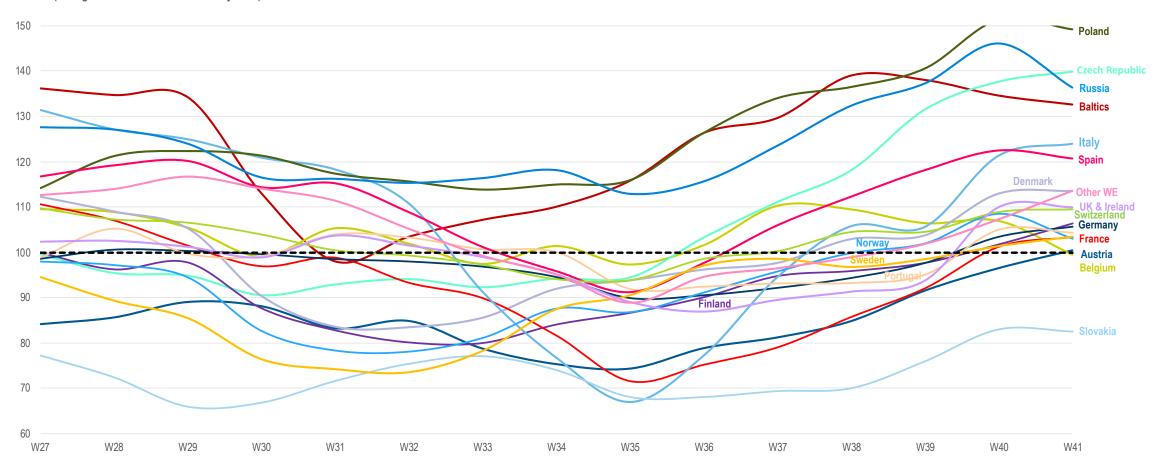


80mn€ on notebooks and tablets, announced early in the crisis

WEEK 41 – ALL COUNTRIES EXCEPT ONE TREND ABOVE BASE 100



Weekly Revenue Trend Index - All Countries (Average 4 Weeks 2019 for Each Country = 100)

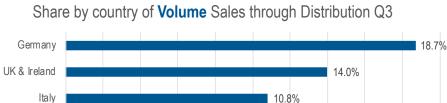


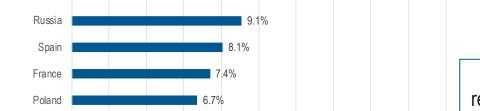
4 weekly distribution sales translated at fixed € exchange rate and includes: UKI, Germany, Italy, France, Spain, Merged countries, Switzerland, Sweden, Austria, Belgium, Denmark, Portugal, Finland, Norway



LEVELS OF CONCENTRATION OF VOLUME/VALUE BY COUNTRY Q3







Merged Countries

Switzerland

Czech Republic

Sweden

Austria

Belgium

Portugal

Denmark

Slovakia 0.5%

2.6%

2.6%

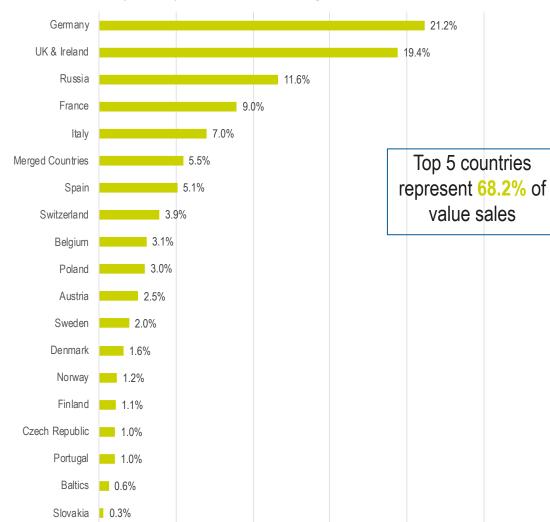
1.9%

1.9%

1.8%

Top 5 countries represent **60.7%** of volume sales

Share by country of Value Sales through Distribution Q3



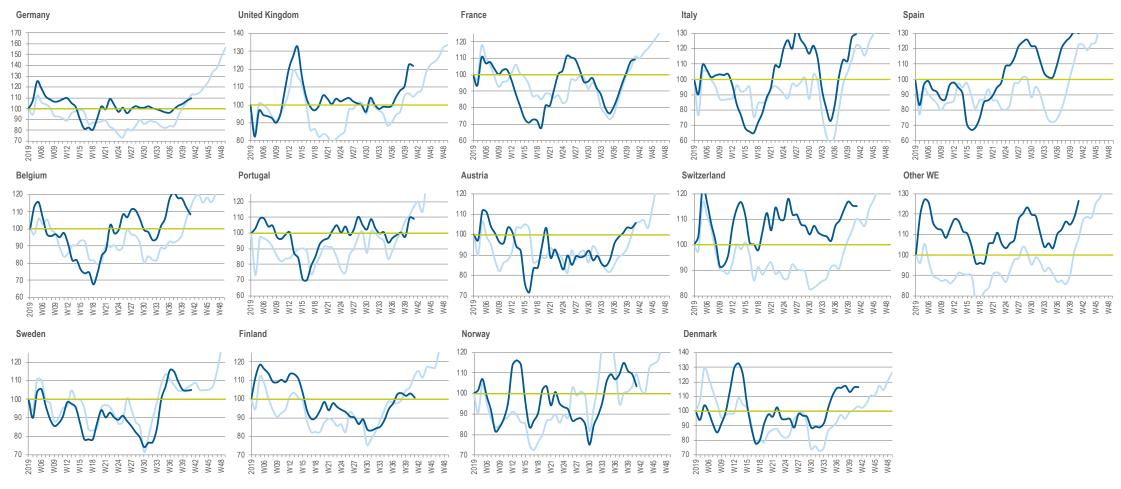
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VOLUME IN W EUROPE: BELGIUM, NORDICS AND GERMANY SHOW SOME SOFTENING



Index Volume Market - Western Europe

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)



4 weekly distribution sales translated at fixed € exchange rate and includes: UKI, Germany, Italy, France, Spain,

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2020

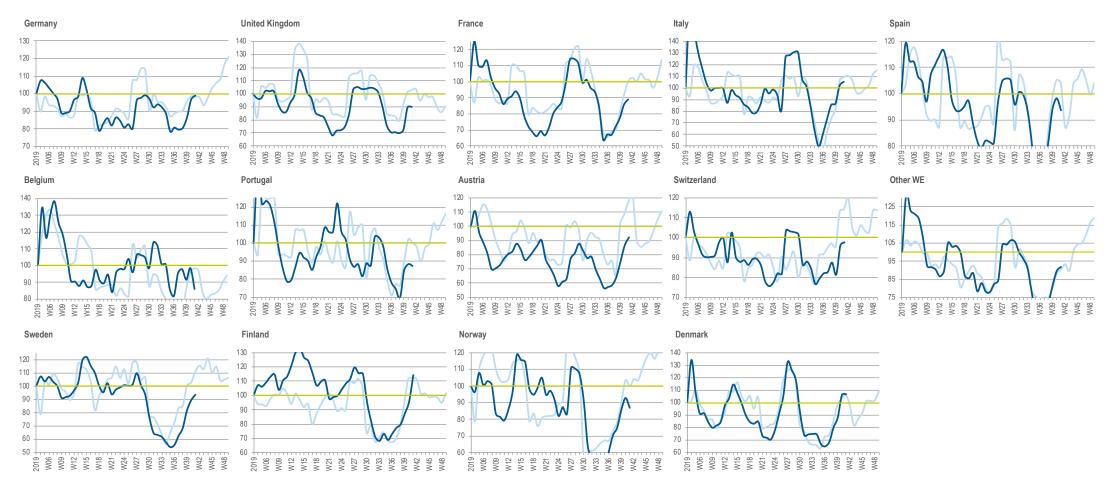
2019

VALUE IN W EUROPE: POSITIVE TREND IN GERMANY (25% OF VALUE IN WE)



Index Value Market - Western Europe

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)



4 weekly distribution sales translated at fixed € exchange rate and includes: UKI, Germany, Italy, France, Spain,

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2019

2020

IN E EUROPE VALUE IS THE STORY

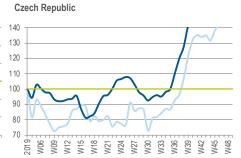


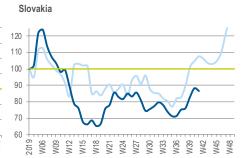
Index Volume Market - Eastern Europe

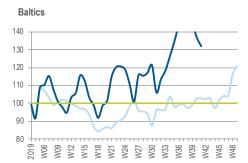
Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)







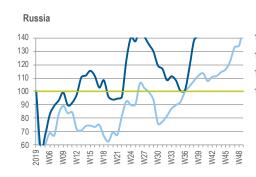


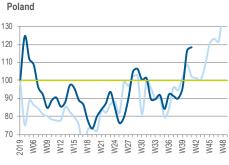


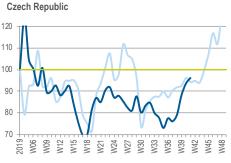
2019

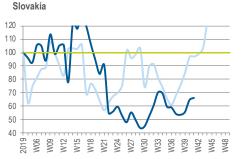
Index Value Market - Eastern Europe

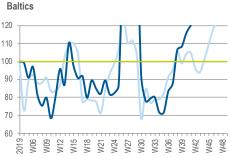
Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)











4 weekly distribution sales translated at fixed € exchange rate and includes: Poland, Baltics, Czech, Slovakia





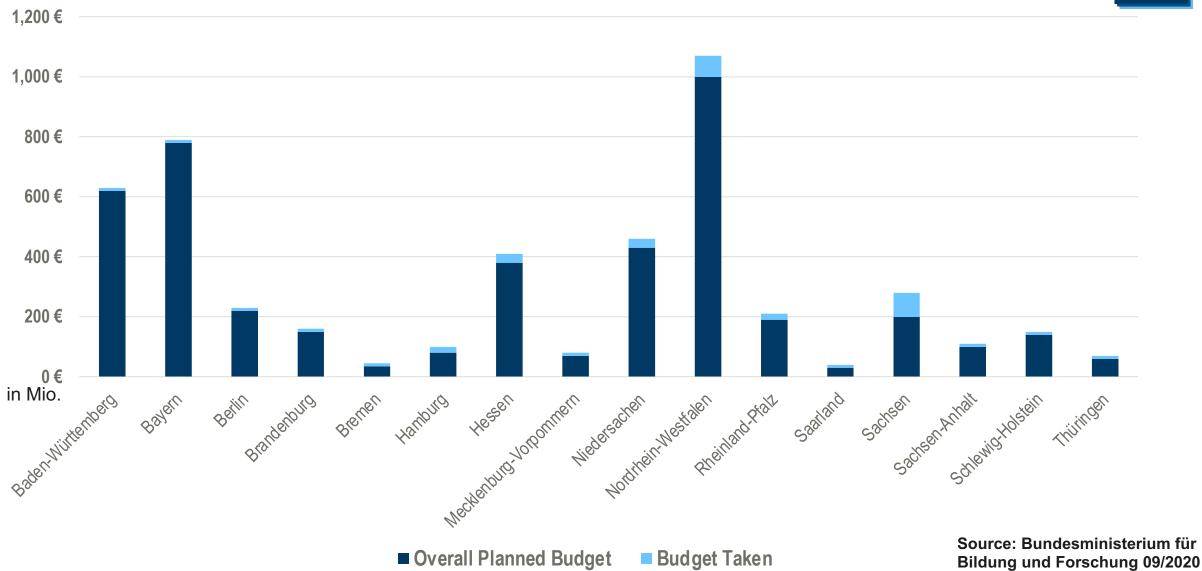
GERMANY REVIEW

21st October, 2020



GERMANY'S BUDGET FOR THE "DIGITAL PACT" – 5 YEAR PLAN 2019-2024

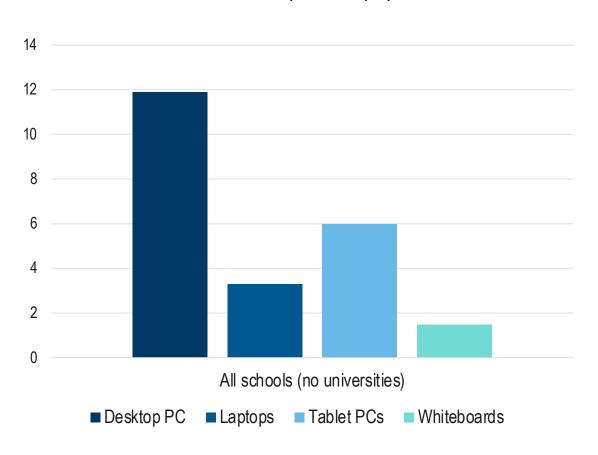




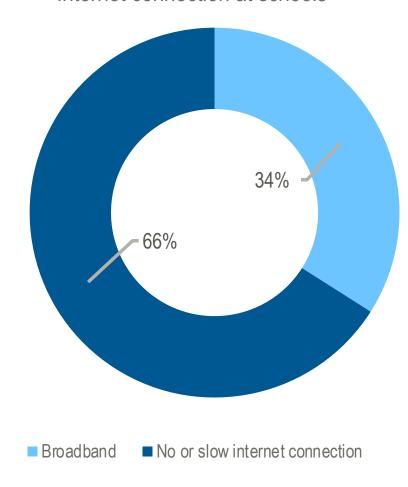
CURRENT IT HARDWARE EQUIPMENT AT SCHOOLS IN GERMANY



IT-Hardware per 100 pupils



Internet connection at schools



Source: WDR 2020/08 Survey at 3691 schools in Germany



Q4 GUIDANCE



KEY SECTOR EVOLUTION 2020 – HEAT MAP



Key Sector	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
Mobile Computing	17.3%	17.3%	22.2%	24.5%	23.7%	20.5%	21.0%	25.0%	23.0%	23.6%
Desktop Computing	5.3%	5.4%	4.6%	3.9%	3.8%	3.7%	3.6%	3.9%	4.0%	4.1%
Infrastructure & security	15.8%	16.6%	15.4%	16.3%	14.3%	15.3%	15.1%	15.1%	14.0%	13.6%
Software & licences	13.4%	12.7%	14.1%	13.4%	11.8%	13.7%	12.3%	10.4%	11.5%	10.9%
Telecoms	13.8%	11.4%	8.6%	7.2%	12.6%	12.4%	13.5%	12.0%	10.5%	9.3%
Printing	2.8%	2.9%	2.9%	2.8%	2.4%	2.5%	2.7%	2.6%	3.0%	3.0%
Printing consumables	6.8%			6.8%	6.1%		6.3%	6.1%		
Services	6.2%			6.2%	4.6%		5.5%	4.3%		
Monitors	2.9%			3.1%	3.4%		3.0%	3.2%		
LFD	0.8%			0.5%	0.6%		0.8%	0.9%		
Other displays	1.2%			0.9%	1.3%		1.3%			
Computing components	4.7%			5.0%	5.1%		4.9%	4.7%		
Computing Accessories	2.1%				2.4%		2.6%	2.8%		
Audio-Video Systems	2.3%			2.4%	2.8%		2.5%	2.6%		
Other sectors	4.4%				5.0%		5.0%	5.0%		

Q4 GUIDANCE: A QUARTER OF 25BN€ IS WITHIN REACH, 4.8% GROWTH



		Q3 Growth	This year's Q4 guidance	Q4 Outlook	Sequential growth
Key sector	Q4 2019 €mn	Q3 2020 vs Q3 2019	Q4 2020 vs Q4 2019 %	Q4 2020	Q4 2020 vs Q3 2020
Mobile computing	4,276	34.2%	26%	5,388	20%
Desktop computing	1,050	-18.8%	-17%	871	22%
Infrastructure & security	3,319	-8.6%	-8%	3,066	15%
Software & licences	3,367	1.7%	-5%	3,199	36%
Telecoms	3,567	8.5%	5%	3,745	50%
Printing	623	-5.2%	-13%	542	10%
Printing consumables	1,393	0.7%	5%	1,463	16%
Services	1,372	-2.0%	-5%	1,303	36%
Monitors	643	24.7%	9%	702	12%
LFD	228	-16.9%	-13%	198	14%
Other displays	377	-3.6%	-3%	365	43%
Computing components	1,024	2.8%	3%	1,055	22%
Computing accessories	518	36.0%	30%	674	19%
AV Systems	685	18.7%	18%	808	50%
Other	1,472	13.4%	15%	1,688	65%
Total	23,914	7.7%	4.8%	25,066	28.5%



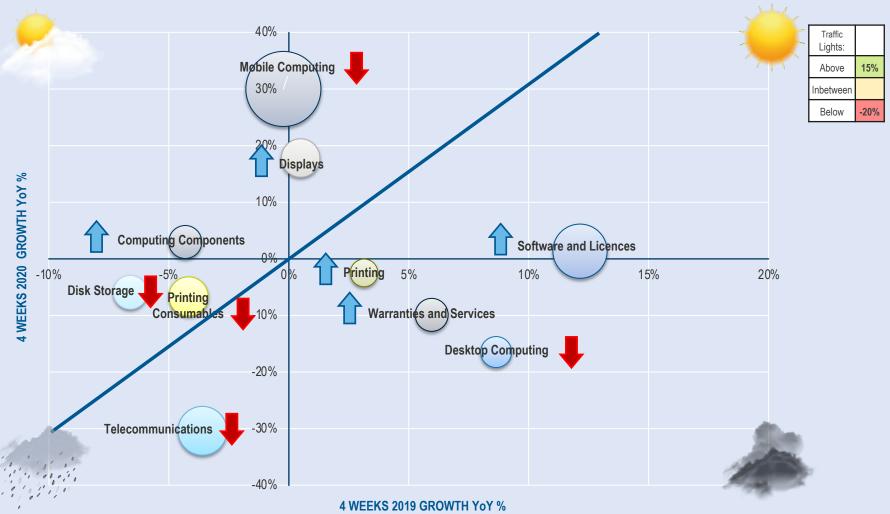
SECTOR/CATEGORY WEATHER MAPS



INDUSTRY SECTOR TRENDS: TOP 10 BY REVENUE IN EUROS



4 Weeks to Week 41 (11/10/20) vs 2019

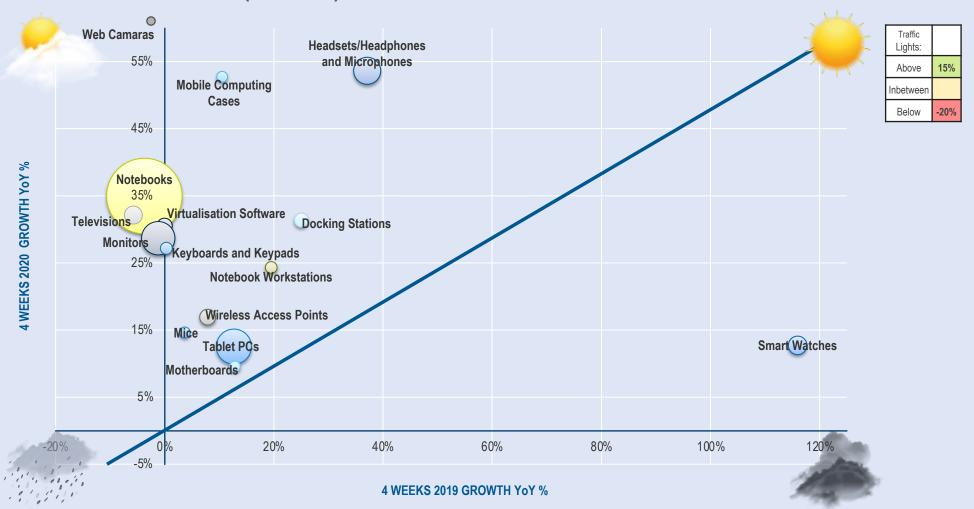


Distribution sales translated at fixed € exchange rate.

CATEGORY TRENDS: TOP 15 BY % REVENUE GROWTH



4 Weeks to Week 41 (11/10/20) vs 2019

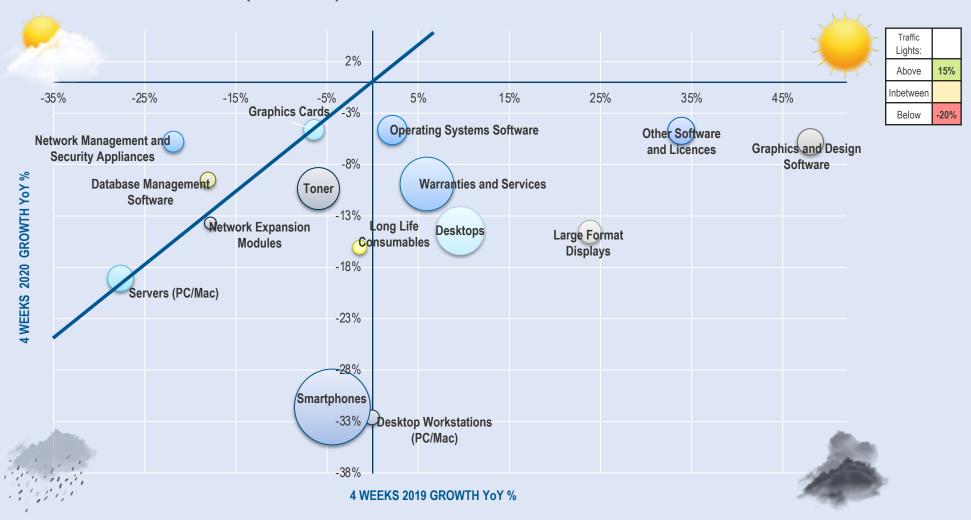


Distribution sales translated at fixed € exchange rate.

CATEGORY TRENDS: TOP 15 BY % REVENUE DECLINE



4 Weeks to Week 41 (11/10/20) vs 2019



Distribution sales translated at fixed € exchange rate.



04

CHANNEL HEALTH

BUSINESS CHANNELS ARE CONTINUING TO BE HARDEST HIT



Channel Performance in Western and Eastern Europe

- % Change in sales through IT Distribution in Euros
- 4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

Business Sectors	Channel
Business Channels	Corporate Reseller
	Small and Medium Reseller
	Etailer Business
Retail Channels	Etailer Consumer
	Retail Chain

Week 41 Week 39 **CHANNEL TREND CHANNEL TREND** WE EE WE EE Total Total -12% 13% -9% -15% -9% -14% 2% 6% 3% 15% -2% -2% -10% -11% -10% 30% 11% 26% 21% 4% 18% 2% 8% 6% 48% 15% 30%

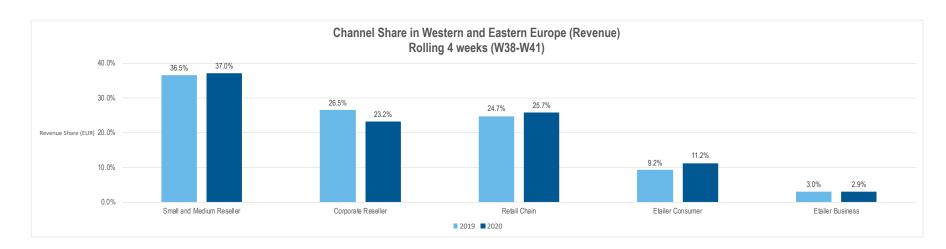
CHANNEL TREND				
EE	Total			
-17%	-10%			
19%	9%			
-20%	-2%			
8%	31%			
35%	26%			
	-17% 19% -20% 8%			

Week 37

VVCCR 00				
CHANNEL TREND				
WE	EE	Total		
-13%	-3%	-12%		
5%	15%	7%		
-3%	-27%	-5%		
24%	-7%	18%		
18%	42%	24%		

Week 35

Above	15%
Inbetween	
Below	-20%





UK SMR GROWING



Business Sectors	Channel
Business Channels	Corporate Reseller
	Small and Medium Reseller
	Etailer Business
Retail Channels	Etailer Consumer
	Retail Chain

	WESTERN EUROPE												
Germany	UK & Ireland	Italy	France	Spain	Switzerland	Sweden	Austria	Belgium	Denmark	Portugal	Finland	Norway	Other WE
-5%	-11%	-10%	-14%	-15%	-26%	-14%	-43%	-15%	-11%	-45%	-30%	-22%	6%
0%	8%	9%	8%	5%	-3%	-9%	12%	-7%	18%	-8%	-9%	-19%	5%
-5%	20%	3%	9%	-17%	-5%	-20%	-27%	36%	-22%	-43%	-42%	-7%	-9%
23%	42%	47%	15%	57%	20%	-80%	21%	34%	51%	60%	-24%	31%	18%
-10%	12%	4%	-20%	-1%	15%	40%	12%	4%	22%	-1%	25%	85%	37%

Business Sectors	Channel
Business Channels	Corporate Reseller
	Small and Medium Reseller
	Etailer Business
Retail Channels	Etailer Consumer
	Retail Chain

EASTERN EUROPE						
Russia	Poland	Czech Republic	Baltics	Slovakia		
20%	-10%	28%	-29%	-46%		
20%	12%	9%	25%	-18%		
-10%	28%	-3%	-18%	-29%		
-9%	66%	-2%	54%	-33%		
23%	47%	11%	133%	-13%		

Above	15%
Inbetween	
Below	-20%

THE NEXT EDITION OF THE SOCIAL CONTEXT





- Fortnightly for half an hour
- Meet people from the Channel
- Themed but open

Friday 6th November 11am and 4pm (UK time)

Expert speaker for 5-minute introduction Then breakout into small groups of 6-8 to network and discuss



Thank you!

ANY QUESTIONS?



For the Period: 4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

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Index Total Market WE

Index Total Market EE

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Weekly %YoY Trend

Largest Industry

Largest Category

Channel

Largest Industries Business

Largest Industries Consumer

Largest Category Business

Largest Category Consumer

Index Total Market 4 weeks

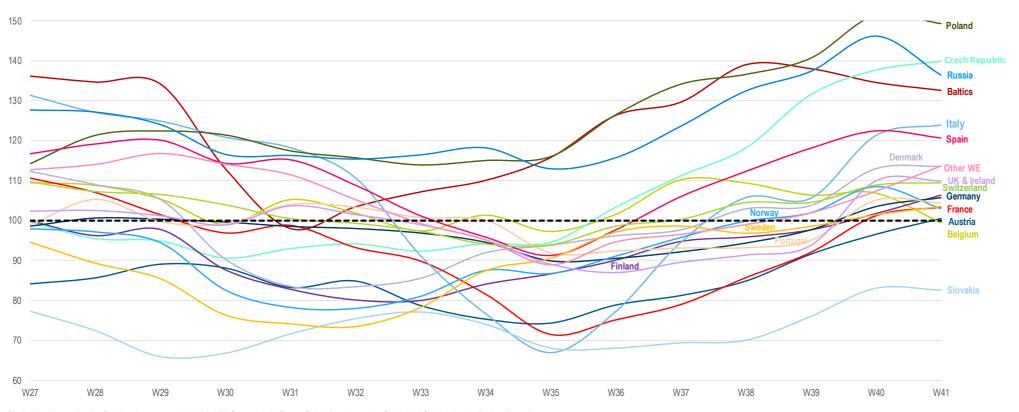
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Index Total Market

Weekly Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)

Weekly Revenue Trend Index - All Countries (Average 4 Weeks 2019 for Each Country = 100)



Index Total Market WE

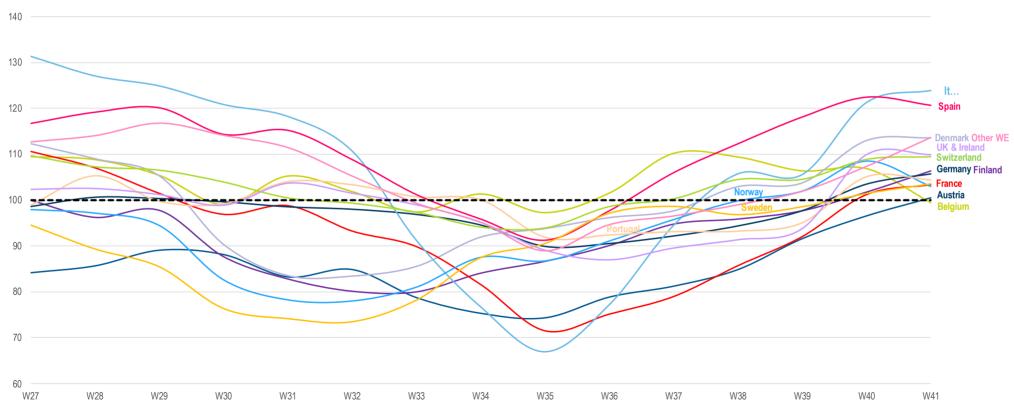
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Index Total Market WE

Weekly Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)





Distribution sales translated at fixed € exchange rate and includes: UKI, Germany, Italy, France, Spain, Merged countries, Switzerland, Sweden, Austria, Belgium, Denmark, Portugal, Finland & Norway.

Index Total Market EE

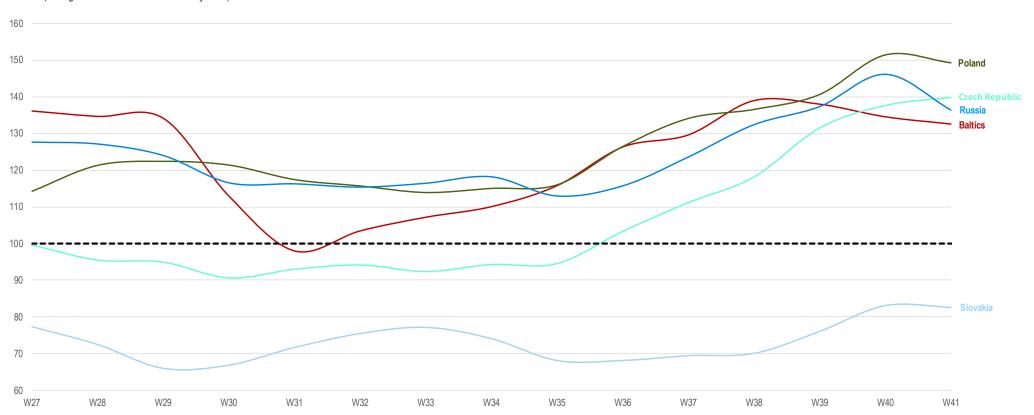
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Index Total Market EE

Weekly Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)

Weekly Revenue Trend Index - Western Europe (Average 4 Weeks 2019 for Each Country = 100)



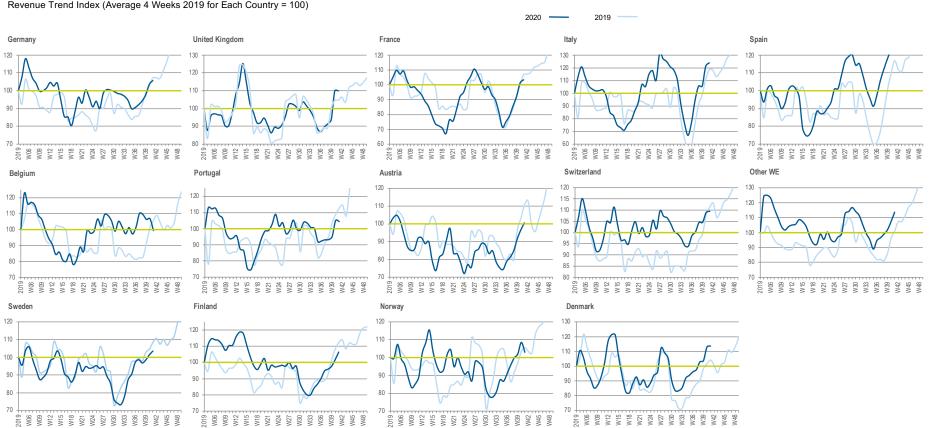
Distribution sales translated at fixed € exchange rate and includes: Poland, Baltics, Czech Republic, Slovakia & Russia.

Index Thumbnail WE

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Index Revenue Trend - Western Europe

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)



Index Thumbnail EE

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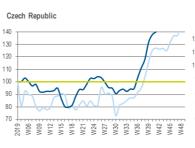
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Index Revenue Trend - Eastern Europe

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)











Index Business Channel

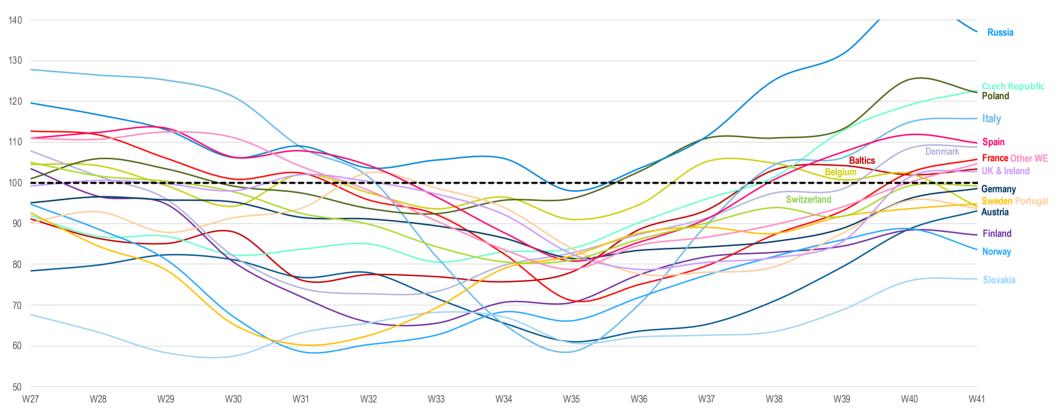
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Index Business Channel

Weekly Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)

Weekly Revenue Trend Index Business Channel - All Countries (Average 4 Weeks 2019 for Each Country = 100)



Business Channel = Small and Medium Reseller, Corporate Reseller & Etailer Business

Index Consumer Channel

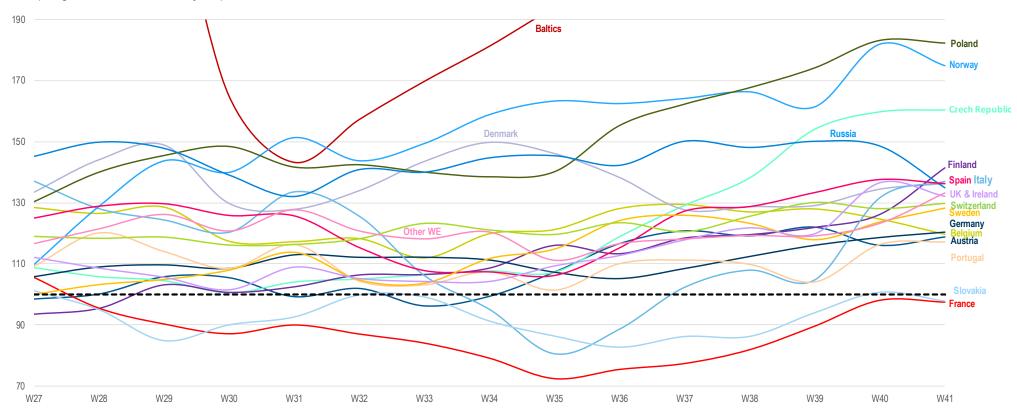
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Index Consumer Channel

Weekly Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)





Consumer Channel = Retail chain & Etailer Consumer

Index Volume Market

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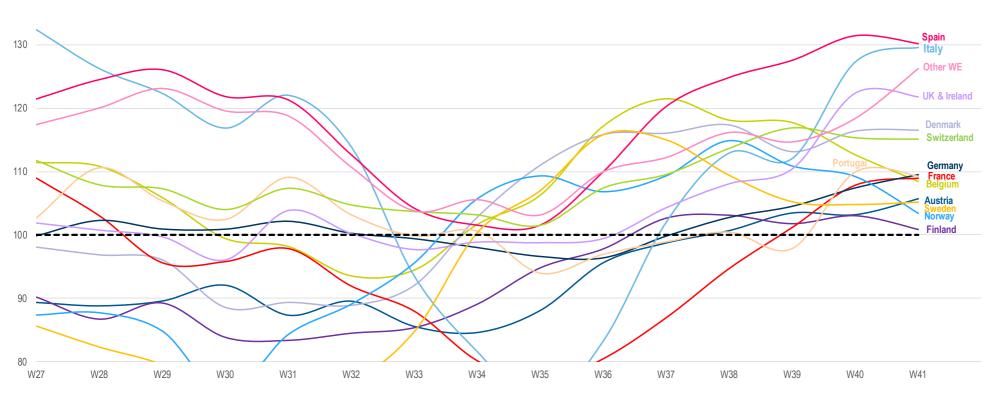
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Index Volume Market

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)

Weekly Revenue Trend Index Volume - All Countries (Average 4 Weeks 2019 for Each Country = 100)



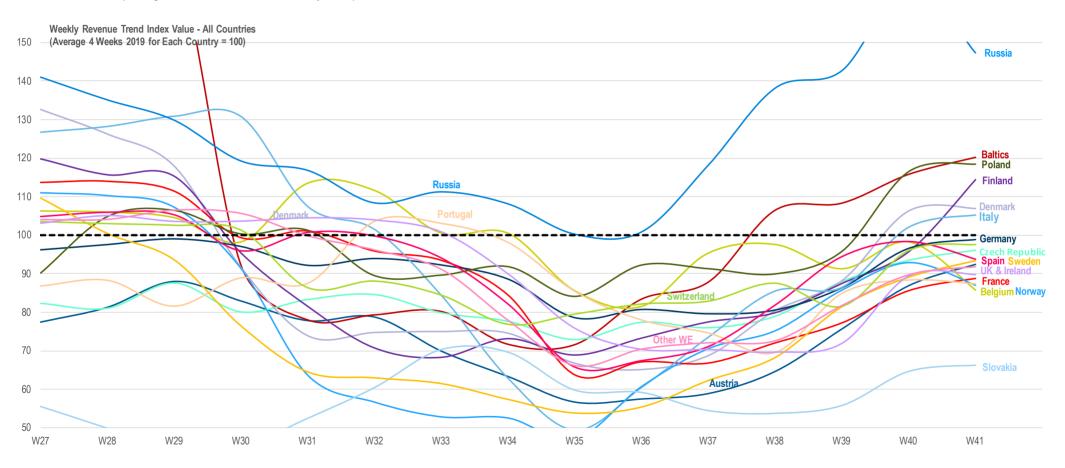
Index Value Market

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Index Value Market

Revenue Trend Index (Average 4 Weeks 2019 for Each Country = 100)



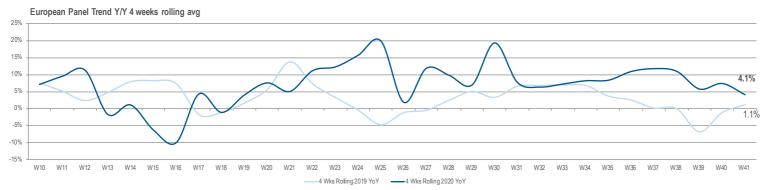
Weekly %YoY Trend

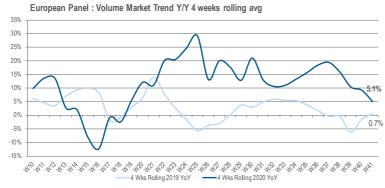
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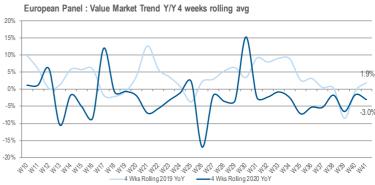
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Weekly %YoY Trend

% Change in sales through IT Distribution in Euros Rolling 4 Week Periods







Largest Industry

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Rank-Rank.

W41

W40

Largest IT Industry Sectors and Countries in Western and Eastern Europe

Traffic Lights:

Above Inbetween Below

INDUSTRY SECTOR TREND

EE

23%

37%

2%

-25%

37%

6%

9%

10%

-21%

-4%

43%

33%

24%

-30%

50%

50%

43%

15%

4%

-4%

-11%

1%

326%

14%

-52%

-30%

20%

110%

-3%

Total

30%

1% -30%

-7%

18%

-6%

-10%

3%

-16%

-2%

38%

36%

-2%

-15%

18%

-10%

16%

3%

0%

2% -18%

11%

11% -22%

-35%

-7%

7%

-11%

-22%

-19%

WE

32%

-2%

-35%

-3%

13%

-10%

-12%

0%

-15%

-2%

37%

37%

-8%

-10%

14%

-20%

13%

-2%

-2%

3%

-20%

14%

5%

-29%

-20%

-1%

3%

-27%

-30%

-34%

EASTERN EUROPE

Czech

26%

2%

-8%

-27%

29%

8%

20%

4%

-14%

-2%

31%

23%

59%

-28%

-18%

10%

121%

9%

131%

-9%

-11%

67%

131%

-28%

-75%

-3%

115%

-66%

43%

3%

Slovakia

19%

-17%

-20%

0%

-5%

-63%

-13%

-73%

-19%

-18%

-30%

1%

-28%

-65%

-79%

-17%

-17%

-17%

-28%

-28%

-26%

17%

0%

70%

197%

19%

-13%

-92%

-39%

-56%

Baltics

22%

16%

172%

32%

8%

-6%

-14%

58%

-26%

25%

43%

38%

-2%

-11%

69%

-21%

15%

-3%

17%

13%

-53%

3469%

-26%

-30%

36%

37%

31%

84%

-8%

Other WE

41%

2%

-1%

9%

9%

8%

1%

12%

-23%

-12%

33%

43%

-11%

7%

63%

-14%

54%

-15%

-2%

1%

35%

-18%

55%

-38%

81%

8%

-15%

-25%

14%

-66%

Russia

3%

95%

-46%

-34%

59%

7%

7%

16%

-27%

-11%

52%

38%

22%

-45%

64%

73%

49%

15%

4%

1%

-4%

-18%

200%

4%

-5%

-36%

7%

216%

43%

-44%

Poland

56%

1%

36%

-9%

23%

20%

21%

9%

0%

20%

53%

37%

34%

21%

223%

-15%

31%

20%

-26%

-8%

-16%

-13%

176%

87%

-53%

-17%

-18%

40%

12%

Norway

-4%

2%

-36%

14%

4%

2%

-42%

-29%

-5%

-12%

77%

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21%

-31%

-12%

19%

13%

-17%

12%

7%

155%

347%

-7%

1474%

97%

-34%

-81%

-91%

% Change in sales through IT Distribution in Euros

ndustry Sector

Mobile Computing

Software and Licences

Telecommunications

Printing Consumables

Warranties and Services

Computing Components

Desktop Computing

Audio-Video Systems

Networking Systems

Server Computing

Wearable Devices

Wireless Networking

Power Equipment Other Networking Equipment

Removable Storage

Smart Home and Office

Unified Communications

Photo and Video Cameras

Terminals, Thin Clients and Points of S

Games Consoles

Scanner Imaging

Security

Tape Storage

1

Connectivity

Electronics

Computing Accessories

Data Center Networking and Security

Displays

Printing

Disk Storage

Sorted by largest indus	stry sector and la	rgest country. Dispia	ys top two categories (b

Sorted by	/ largest	industry	sector	and I	largest	countr	ry. I	Displays	top two	catego	ries (L

Sorted by largest industry	sector and largest country	. Displays top two categories	(by revenue) within eac	h Industry sector.

orted by largest industry sector and largest countr	y. Displays top two categories (by revenue) within each Industry sector.

IIK &

Ireland

48%

-8%

-18%

-14%

8%

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-16%

-2%

-28%

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-30%

-72%

-20%

Italy

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-14%

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-66%

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-39%

-60%

Spain

29%

-19%

-37%

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71%

-5%

3%

31%

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-9%

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-20%

42%

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-3%

8%

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WESTERN EUROPE

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-47%

-15%

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Denmark

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70%

-4%

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4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019
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-1%

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6%

-23%

-18%

7%

-17%

-30%

38%

46%

-71%

Sorted by largest industry sector and largest country

Notehook

Desktops

Monitors

Toner

Processor

Tablet PCs

Ink Cartridges and Tanks

Office Applications Software

♣ Solid State Drives (SSDs)

Hard Disk Drives (HDDs)

Data Management Software

Operating Systems Software

Taphics and Design Software

1 Network Switches

Servers (PC/Mac)

All-in-One Lasers

Large Format Displays

↑ Wireless Access Points

♣ Virtualisation Software

Network Management Software

1 Network Management and Security Appliances

Uninterruptable Power Supplies (UPS)

Cables and Connectivity Adapters

1 Desktop Workstations (PC/Mac

Database Management Software

Long Life Consumables

↑ Mobile Computing Cases

1 Developer Tools Software

Integrated Systems

1 Digital Media Players

49 1 NAS Devices

1 VOIP Systems

All-In-One Inkjets

♣ Network Routers

Graphics Cards

Docking Stations

T Keyboards and Keypads

Notebook Workstations

1 Laser Printers

1 Transceivers

Projectors

1 Smart Watches

♣ RAM Memory

July Disk Arrays

1 Televisions

Theadsets/Headphones and Microphones

Security Software

Smartnhones

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Rank- Rank

WAO WAI

24

21

23

25

32

33

42

43

#N/A 50

Largest Categories and Countries in Western and Eastern Europe
% Change in sales through IT Distribution in Euros
4 M

- 4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

Traffic Lights Ahove

Inbetween

CATEGORY TREND

25% 35%

2%

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-19%

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17% 29%

-17% -2%

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-28% -18%

25%

18% -5%

-35% -19%

11% -6%

24% 13%

-6% 0%

36% 4%

59% 0%

124% 32%

3% -15%

-5% 4%

43% 17%

7%

88%

167%

0% -5%

20%

-4%

20% 27%

-46%

-48% 24%

81%

19% -9%

23%

11%

-12%

31% 53%

-58% -9%

23% 25%

46% 37%

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27% 28%

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98% -47% -34%

-72% 27% 94%

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20 CONTEXT CONFIDENTIAL // Not to be reproduced or disseminated without permission

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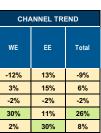
Channel Performance in Western and Eastern Europe

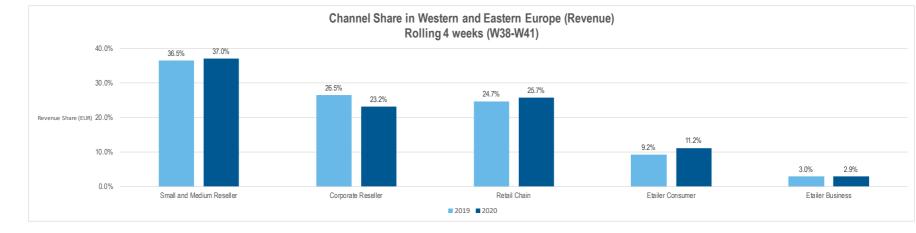
- % Change in sales through IT Distribution in Euros
- 4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

Sorted by largest country

Traffic Lights:								
Above	15%							
Inbetween								
Below	-20%							

					WESTERN EUROPE							-	EASTERN EUROPE							
							WE5	LIKIV LOIK	OF E								LAS	I LIKIV LOIK	OFL	
Business Sectors	Channel	Germany	UK & Ireland	Italy	France	Spain	Switzerland	Sweden	Austria	Belgium	Denmark	Portugal	Finland	Norway	Other WE	Russia	Poland	Czech Republic	Baltics	Slovakia
Business Channels	Corporate Reseller	-5%	-11%	-10%	-14%	-15%	-26%	-14%	-43%	-15%	-11%	-45%	-30%	-22%	6%	20%	-10%	28%	-29%	-46%
	Small and Medium Reseller	0%	8%	9%	8%	5%	-3%	-9%	12%	-7%	18%	-8%	-9%	-19%	5%	20%	12%	9%	25%	-18%
	Etailer Business	-5%	20%	3%	9%	-17%	-5%	-20%	-27%	36%	-22%	-43%	-42%	-7%	-9%	-10%	28%	-3%	-18%	-29%
Retail Channels	Etailer Consumer	23%	42%	47%	15%	57%	20%	-80%	21%	34%	51%	60%	-24%	31%	18%	-9%	66%	-2%	54%	-33%
	Retail Chain	-10%	12%	4%	-20%	-1%	15%	40%	12%	4%	22%	-1%	25%	85%	37%	23%	47%	11%	133%	-13%





UK &

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-7%

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27%

-36%

-68%

-55%

Italy

75%

24%

-49%

-13%

-12%

-10%

-17%

6%

-8%

-12%

3%

58%

-11%

-52%

88%

1%

15%

5%

17%

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3%

2%

-36%

-44%

-49%

-10%

19%

-51%

6%

53%

France

42%

-9%

-48%

10%

3%

-5%

-12%

-24%

-10%

-7%

53%

39%

-13%

-6%

217%

-47%

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-10%

-10%

10%

-9%

98%

19%

-31%

98%

-13%

31%

-50%

-41%

-68%

Spain

51%

-22%

-53%

-2%

22%

-8%

1%

6%

-10%

-23%

-7%

57%

-27%

37%

-10%

-3%

-18%

-22%

18%

44%

-27%

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-29%

-9%

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13%

-37%

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9%

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-36%

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-66%

-19%

-41%

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-22%

85%

86%

-53%

25%

202%

-42%

-23%

151%

24%

-51%

Germany

12%

-36%

10%

-6%

-23%

2%

-23%

-26%

-8%

63%

44%

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-51%

WESTERN EUROPE

-5%

-16%

-10%

-17%

-4%

-35%

-28%

-22%

-44%

-35%

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5%

-10%

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-86%

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-31%

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-31%

24%

-2%

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-29%

-62%

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-16%

-35%

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-100%

-81%

-61%

120%

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-25%

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-76%

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133%

-63%

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-20%

-44%

-30%

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-11%

-33%

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-18%

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37%

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80%

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-37%

-22%

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18%

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Traffic Lights:

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29%

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-7%

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44%

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-19%

-14%

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-25%

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-12%

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-12%

17%

2%

-34%

3%

-16%

1%

-30%

-32%

-7%

EASTERN EUROPE

Czech

59%

-1%

-18%

-23%

23%

-3%

19%

-17%

-16%

-4%

98%

33%

59%

-26%

-30%

11%

122%

10%

140%

28%

-16%

53%

465%

-29%

-89%

-30%

99%

-67%

66%

-1%

Baltics

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47%

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-22%

-31%

-16%

60%

-59%

-20%

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-45%

-14%

-7%

7%

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21%

13%

-20%

-9%

-13%

Slovakia

-6%

-16%

-26%

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-22%

-62%

-14%

-75%

-31%

-41%

53%

-6%

-14%

-67%

-75%

-18%

-10%

-22%

-30%

-35%

-31%

69%

15%

93%

278%

-3%

-19%

-92%

-60%

-54%

Other WE

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-13%

42%

-16%

51%

-22%

-2%

-9%

56%

154%

-38%

-42%

-41%

-62%

-41%

0%

-54%

1%

94%

-30%

-35%

11%

6%

9%

9%

-29%

-18%

37%

43%

25%

-51%

-34%

54%

32%

3%

1%

-3%

-3%

-33%

238%

1%

3%

-51%

9%

221%

19%

-30%

44%

-4%

10%

-14%

-4%

11%

16%

-19%

-6%

0%

21%

-6%

119%

-34%

-13%

7%

-30%

-11%

-14%

-26%

49%

158%

1%

-44%

-63%

29%

64%

Inbetween

INDUSTRY SECTOR TREND

EE

19%

36%

-6%

-26%

2%

-27%

-16%

34%

31%

18%

-38%

6%

31%

3%

1%

-2%

-11%

-13%

201%

15%

-28%

-48%

11%

110%

23%

Largest Industries in Business Channel

4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

% Change in sales through IT Distribution in Euros

Sorted by largest industries and country size in Business Channel

Industry Sector

Mobile Computing

Software and Licences

Printing Consumables

Warranties and Services

Computing Components

Desktop Computing

Audio-Video Systems

Networking Systems

Server Computing

Wearable Devices

Wireless Networking

Power Equipment

Removable Storage

Games Consoles

Scanner Imagin

Tape Storage

Security

Smart Home and Office

Unified Communications

Photo and Video Cameras

Terminals, Thin Clients and Points of Sales

Connectivity

Electronics

Computing Accessories

Data Center Networking and Security

Other Networking Equipment

Telecommunication

Displays

Printing

Disk Storage

Largest Industries Business

Back to Contents

Rank-Rank

5

W40

10

12

18

20 20

22 22

23 23

24 25

26 26

29

28

30

27

CONTEXT Covid-19 Weekly Report

UK 8

Ireland

61%

-26%

-17%

-4%

83%

17%

56%

37%

22%

55%

32%

54%

33%

32%

32%

197%

3%

30%

67%

-19%

-45%

-8%

66%

-45%

-22%

4%

509%

-92%

38%

Italy

-12%

-14%

-1%

-7%

-33%

83%

170%

-8%

39%

30%

53%

232%

34%

283%

53%

-9%

22%

-32%

-40%

29%

-17%

-32%

-56%

-7%

-39%

-57%

77%

-56%

France

32%

-73%

-17%

84%

-15%

91%

4%

42%

30%

38%

18%

118%

1615%

-43%

84%

112%

-5%

105%

56%

187%

166%

-40%

11%

42%

-40%

5900%

250%

-35%

Spain

14%

116%

-30%

-7%

165%

2%

149%

52%

13%

16%

131%

93%

86%

385%

117%

35%

70%

28%

112%

14%

-48%

-19%

34%

99%

3%

84%

18%

3640%

-58%

-48%

96%

-58%

14%

68%

28%

171%

60%

20%

29%

-14%

59%

81%

47%

-18%

302%

38%

60%

44%

27%

-5%

10%

24%

10%

-14%

29%

23%

-46%

43%

-31%

Germany

-51%

28%

38%

8%

29%

10%

30%

21%

222%

133%

31%

73%

13%

-29%

-41%

-35%

120%

103%

WESTERN EUROPE

Denmark

268%

-9%

-6%

95%

-35%

125%

79%

29%

53%

15%

106%

802%

155%

1605%

1%

64%

198%

27%

34%

377%

167%

-71%

-85%

100%

374%

284%

310%

-96%

79%

-40%

-53%

-29%

45%

30%

83%

-52%

20%

83%

57%

81%

508%

70%

-84%

37%

72%

33%

-5%

-25%

10%

2306%

2%

62%

-49%

-4%

-72%

65%

-82%

Portugal

16%

133%

-43%

-10%

101%

92%

1900%

161%

39%

3%

52%

29%

308%

2190%

137%

1681%

19%

-34%

82%

113%

-43%

-68%

281%

-19%

-15%

529%

-96%

-40%

-6%

39%

1017%

-15%

-12%

35%

68%

27%

36%

-34%

-11%

33%

943%

-22%

-50%

57%

114%

10%

-4%

15%

-77%

-19%

89%

-29%

-68%

105%

Sweden

22%

251%

-4%

-8%

129%

37%

358%

-23%

-17%

42%

50%

26%

38%

133%

230%

6%

10%

-6%

-38%

28%

-58%

-50%

-26%

338%

32%

20%

-75%

-75%

-44%

872%

-24%

-14%

116%

46%

382%

28%

29%

13%

-24%

-6%

150%

59%

127%

65%

4%

33%

-25%

-21%

38%

-68%

237%

-33%

277%

509%

Traffic Lights

Above

Below INDUSTRY SECTOR TREND

WE

36%

58%

-36%

-1%

54%

26%

45%

40%

17%

25%

32%

40%

38%

262%

13%

139%

33%

38%

46%

8%

-26%

8%

6%

-11%

-24%

52%

5%

132%

-2%

-46%

EASTERN EUROPE

Czech

12%

39%

-3%

-33%

34%

22%

170%

22%

-11%

0%

6%

13%

58%

-39%

-12%

-13%

120%

9%

82%

-79%

-7%

134%

19%

-4%

-69%

69%

166%

338%

5%

Baltics

484%

259%

98%

45%

73%

280%

54%

206%

71%

68%

43%

113%

2152%

-11%

60%

118%

56%

59%

12%

-51%

4989%

8%

-39%

74%

493%

799%

1233%

-5%

Slovakia

58%

-28%

-17%

-4%

58%

-65%

-70%

57%

71%

-65%

18%

-48%

237%

-81%

25%

-30%

10%

-24%

6%

-16%

-53%

-14%

-94%

93%

167%

2%

-17%

Russia

4%

101%

-51%

-30%

146%

11%

-42%

30%

-24%

0%

65%

34%

15%

206%

146%

762%

93%

60%

94%

42%

-5%

376%

184%

74%

-7%

139%

-11%

-18%

328%

-54%

31%

220%

-7%

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73%

-13%

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117%

67%

34%

101%

398%

-71%

86%

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869%

138%

-4%

-35%

117%

12%

16%

32%

404%

576%

1169%

1157%

522%

-14%

224%

-3%

-99%

Poland

26%

52%

16%

34%

155%

60%

44%

70%

52%

183%

117%

298%

655%

180%

51%

19%

-4%

-17%

16%

595%

-43%

-55%

63%

129%

365%

-76%

Inbetween

EE

53%

6%

-19%

78%

17%

23%

-5%

12%

47%

36%

39%

199%

75%

701%

110%

54%

-11%

-11%

92%

467%

4%

-55%

104%

83%

106%

264%

13%

Total

33%

57%

-31%

-4%

60%

23%

43%

33%

11%

21%

34%

40%

38%

233%

18%

215%

40%

44%

47%

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-22%

20%

10%

-10%

-38%

59%

10%

129%

46%

-18%

CONTEXT Covid-19 Weekly Report

Largest Industries Consumer

Back to Contents

Rank-

W40

12

13

15

18

17

19

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22

23

25

27

28

30

22

Largest Industries in Consumer Channel

4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

% Change in sales through IT Distribution in Euros

Sorted by largest industries and country size in Consumer Channel

Industry Sector

Mobile Computing

Software and Licences

Telecommunications

Displays

Printing

Disk Storage

Printing Consumables

Warranties and Services

Computing Components Desktop Computing

Audio-Video Systems

Networking Systems

Server Computing

Wearable Devices

Wireless Networking

Removable Storage

Games Consoles

Scanner Imaging

Tape Storage

Security

Smart Home and Office

Unified Communications

Photo and Video Cameras

Terminals. Thin Clients and Points of Sales

Power Equipment

Connectivity

Electronics

Computing Accessories

Data Center Networking and Security

Other Networking Equipment

4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

Notebooks

Smartphones

Desktops

Tablet PCs

Monitors

Security Software

Office Applications Software

Data Management Software

Operating Systems Software

Graphics and Design Software

Hard Disk Drives (HDDs)

Virtualisation Software

Large Format Displays

Wireless Access Points

Notebook Workstations

Developer Tools Software

Network Routers

♣ All-In-One Inkjets

Integrated Systems

Desktop Workstations (PC/Mac)

Network Expansion Modules

Long Life Consumables

Keyboards and Keypads

Servers (Unix)

VOIP Systems

Televisions

1 Laser Printers

1 **Graphics Cards**

1 Projectors

Database Management Software

Cables and Connectivity Adapters

Uninterruptable Power Supplies (UPS)

Network Management Software

↑ Network Management and Security Appliances

Headsets/Headphones and Microphones

Ink Cartridges and Tanks

Network Switches

Solid State Drives (SSDs

Disk Arrays

Servers (PC/Mac)

RAM Memory

♣ All-in-One Lasers

Docking Stations

Transceivers

= Tone

1

1 Processors

1

1

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Warranties and Services

Sorted by largest categories and country size in Business Channel

Back to Contents

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Top Categories in Busines	s Channel

Top Categories in Business Chariner		
% Change in sales through IT Distribution in Euros		

Germany

11%

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46% -25% -50%

-22%

9%

-11%

31%

2%

-19% -11%

32%

16% -17%

-9% -28%

-29%

-22% -14%

-8%

63%

-3% -19%

-23%

-35%

-36%

-19%

42%

-24% -29%

7%

-16%

-2%

13% 33%

2%

-11%

22%

-4%

2%

5% -13%

-2% -10% 378%

-29% -39%

-51%

-23%

-49% 502%

-46%

-6% -36%

-1% -20%

37%

-16%

14%

-50% 22%

75%

-30%

UK &

49%

-17%

-36%

-19%

21%

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65%

-42%

46%

-15%

-52%

-90%

-53%

Italy

83%

-17%

-5%

-14% 10%

51%

-3%

-15% 23%

27%

66%

-12%

-15%

25%

-7% -1%

-14%

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-23% -14%

-31%

-6%

107%

-9% -29%

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-15%

68%

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46%

-39%

-4%

2%

4%

-25%

4%

-77%

-23%

-14%

48% 9%

-10%

-12%

37%

55%

76%

-44%

France

50%

-12%

-55%

-9%

15%

-7%

-1%

-26%

16%

-13%

-34%

-11%

79%

-8%

11%

-9%

-7%

-22%

-22%

-24%

-2%

87%

11%

-15%

35%

-22%

-12%

13%

14%

-17%

-20%

1%

161%

-13%

-22%

16%

-19%

17%

-34%

-25%

-32%

Spain

56%

1%

-56%

-8%

-23%

31%

-59%

31%

22%

-56%

23%

-11%

10%

22%

15%

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18%

-1%

-33%

44%

9%

-45%

100%

1%

114%

-32%

-10%

-23%

51%

-9%

-22%

-51%

-41%

-29%

Switzerland

-36%

-28%

-33%

2%

-12%

-54%

18%

6%

-13%

28%

-41%

-15%

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183%

-35%

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38%

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-46%

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23%

-11%

-84%

-38%

18%

-26%

34%

-24%

-6%

-57%

-93%

27%

WESTERN EUROPE

Austria Belaium Denmark

49%

-11%

-53%

-41%

-13%

-4%

-23%

35%

5%

17%

-14%

-11%

-27%

-26%

-20% -56%

96%

-5%

-22%

45%

-23% 25%

4%

44%

-48% -1%

-22%

-59%

-3% -26%

42%

76%

-7%

-1% 10%

112%

-20%

-1%

201%

-36%

-71%

-32% 2%

16%

-28% -34%

-19%

40%

25%

-53% 13%

-50% -8%

-81%

-98% 233%

-57%

18%

-33%

-48%

-16%

-10%

28%

-19%

4% 36%

4%

59%

-48% 92%

14%

-37%

-24% -9%

103%

-29%

117% 11%

-7%

-3% 224%

-18% -9%

-7%

67%

-5%

-56% 23%

-18%

-3% -4% 38%

-22%

-57%

72%

176%

-37%

-30%

10%

-73% -25%

-54%

-18%

-15% -49%

46%

-24%

-26%

27%

-2%

-29%

-35% -9%

4% -37%

-40%

155%

-26%

-32%

-24%

-24% -20%

-20%

-55% -28%

-38%

38%

-11% 94%

-31% 16%

-37% -2%

-15% 484%

-51%

-73% 232%

-15% 107%

-92% -66%

-21% -53%

-61%

-47% -14%

-33%

-8%

-55%

100% 89%

-86% -60%

Portugal Finland

11%

-62%

-15%

-30%

45%

-14%

-46%

4%

-13%

-9%

-11% 18%

-42%

62%

20%

-40%

-15% 2%

36%

34%

166%

144% -7%

-38%

-16%

41%

-74% 26%

-49%

-35%

19%

-41%

-12%

-44%

-27% -16%

-26%

-13%

-43%

-21%

8%

-64% 20%

-39% 17%

14%

-3%

-14% 36%

-47%

-50% -35%

0%

26% 53%

-69%

-73%

-58% -15%

-45%

-21% -16%

-43% -42%

-51% 2%

-21% -11%

-13% 36%

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-28% -14%

-24% 0%

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-38% 41%

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-60% 9%

-43%

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-19%

-44%

-86%

-88% 17%

Norway

-45% 2%

-79%

-7%

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-22%

-3% 0%

-12%

-9%

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-17%

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-84% 5%

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-55%

-35% 5%

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Other WE

62% 5%

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16% -12%

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-39% 7%

-1% -28%

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86% 117%

-19%

-6%

-28% -58%

1% -53%

-3% 46%

52% 249%

-11%

57% 20%

-9%

34%

64%

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96% -80%

-3%

-12%

-14%

38%

-63% 10%

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485%

-48%

-29%

57%

-35% 28%

-13%

215%

Russia

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-62%

-23%

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-10%

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-71% 135%

1105%

-41%

-95% 535%

-71%

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Poland

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16% 19%

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-9% 47%

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43% -12%

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25% -17%

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-38% 168%

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49% -21%

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-20% 151%

-9% 7%

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15% 5%

-22%

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-19%

-13% 9%

-56%

165%

171%

Sweden

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-28%

-7%

-44%

-11%

-31%

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-38%

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-33%

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7%

28%

86%

-7%

-12%

-54%

-80%

-37%

-20%

-34%

33%

-39%

-16%

-45%

-90%

-17%

Traffic Lights Above

Inbetween

CATEGORY TREND

22%

-10%

-24%

-33% -12%

17%

28%

-7%

19%

-16%

-4% -14%

23%

73%

12%

57%

-46%

-5%

17% 6%

63%

13%

17%

79% 2%

-55%

-8% -8%

0%

23%

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-13%

-64%

-52%

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13% 26%

-3%

-10%

-16%

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-11%

-33%

-23%

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-13% 9%

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-15% 21%

-18%

-12% 13%

-12%

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-8%

-18%

-17% -42%

-25%

-12% 25%

26% 162%

-21%

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-21%

-15% -18%

31%

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-13%

23%

-16% 19%

-8%

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-33%

-12% 114%

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-7%

-35%

-19% -12%

-5%

28%

-18%

-12%

-31% 69%

5%

-36% 25%

EASTERN EUROPE

Panuhli

50%

-17%

-10%

3%

16% -17%

10%

-38%

-9%

20%

-5%

81%

65%

30% 3%

5%

98%

-51%

-6%

30%

24%

105%

-88%

-49%

40% -47%

-1%

-30%

173%

-100%

-26%

Baltics Slovakia

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-16% -14%

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-60%

29%

-58%

-55% -7%

-8% -9%

12% 36%

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-17% -53%

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-52% -9%

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-19% -66%

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-15% -42%

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-52% -7%

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-24% 3%

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Ireland

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-76%

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Italy

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-6%

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-18%

36%

-19%

-43%

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-96% -31%

France

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-79%

-8%

76%

-18%

32%

39%

3%

-25%

656%

34%

-30%

17%

2%

76%

-25%

11%

128%

54%

240%

20%

-4%

23%

113%

-86%

91%

72%

-3%

32%

97%

103%

28%

27%

7%

-48%

79%

54%

-46%

-40%

-19%

-39%

117%

417%

Spain

17%

-30%

-4%

103%

1%

221%

12%

135%

141%

2283%

31%

-3%

12%

11%

85%

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-23%

74%

95%

87%

24%

67%

39%

20%

87%

149%

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192%

-10%

45%

97%

77%

-4%

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-64%

-61%

-49%

Switzerland

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31%

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-4%

-70%

-5%

German

38%

-51%

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41%

-17%

76%

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47%

-1%

6%

19%

30%

112%

-11%

2%

125%

44%

8%

-86%

-4%

37%

-17%

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1%

1%

79%

-74%

-12%

-50%

WESTERN EUROPE

53%

-24%

72%

127%

-17%

-22%

20%

23%

-27%

7%

-19%

245%

2%

169%

-57%

45%

0%

62%

11%

301%

1%

15%

16%

769%

-27%

382%

-45%

117%

73%

39%

41%

472%

290%

271%

-4%

51%

-7%

-54%

-33%

-70%

-37%

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Sweden

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52%

102%

-23%

57%

-24%

-9%

141%

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-16%

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Belgium

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86%

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Portugal

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-92% 67%

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115%

-56%

530%

-87%

-83%

-50%

-100%

Finland

52%

-14%

-15%

63%

-15%

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Norway

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-31%

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406%

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1470%

2239%

241%

583%

63%

99%

74%

-1%

-14%

-5%

373%

61%

-17%

-100%

Largest Category Consume

Largest Categories in Consumer Channel

ge in sales through IT Distribution in Euros

4 Weeks to Week 41 (to October 11 2020) vs Same Period 2019

Sorted by largest categories and country size in Consumer Channel

Notebooks

1 Tablet PCs

Monitors

Desktops

Processors

Smart Watches

Televisions

All-In-One Inkiets

Hard Disk Drives (HDDs)

Solid State Drives (SSDs

Wireless Access Points

Keyboards and Keypads

Smart Bands and Activity Trackers

Office Applications Software

Operating Systems Software

Mobile Computing Cases

Uninterruptable Power Supplies (UPS)

Cables and Connectivity Adapters

Smartphone Protective Cases

Digital Media Players

Network Switches

RAM Memory

Security Software

♣ Portable Speakers

Games Accessories

Powerline Devices

♣ Laser Printers

♣ NAS Devices

Projectors

♣ Smart Speakers

♣ Mobile Phones

♣ Memory Cards

USB Memory

♣ Consoles Fixed

♣ Digital Camera

♣ IP Cameras

T Warranties and Services

All-in-One Lasers

Network Routers

Graphics Cards

Toner

Smartphones

Ink Cartridges and Tanks

1 Headsets/Headphones and Microphones

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Traffic Lights: Ahove Inhetweer

CATEGORY TREND

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55%

-19%

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-6%

29%

36%

128%

-3%

4%

27%

12%

3%

2%

-21%

127%

172%

167%

30%

24%

83%

154%

192%

23%

-44%

11%

35%

-31%

13%

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48%

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-20%

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-86%

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-73%

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42% 27%

-36%

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6%

33%

46%

84%

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59%

152%

18%

45%

-22%

27%

32%

19%

44%

84%

34%

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20%

17%

5%

-19%

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-55%

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-23%

-37%

EASTERN EUROPE

Czech

Republic

1%

-2%

118%

46%

-26%

-12%

-32%

11%

-1%

-20%

61%

6%

53%

-41%

-41%

113%

217%

67%

-20%

-28%

32%

313%

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170%

-69%

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-35%

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-3%

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32%

-102%

-100% 267%

74%

-62%

-10%

-11%

-14%

-88%

-17%

Slovakia

48%

-17%

133%

20%

1%

-72%

56%

-74%

-83%

276%

29%

-54%

-72%

211%

-77%

-53%

-42%

-23%

-38%

125%

24%

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-69%

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-73%

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223%

199%

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-67%

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102%

31%

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-2%

-11%

-10%

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136%

Baltics

51%

269%

33%

76%

7%

76%

193%

190%

-25%

9%

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192%

37%

55%

88%

4%

31%

77%

172%

19%

20%

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60%

320%

88%

9%

83%

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Poland

62%

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Other WE Russia

44%

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62%

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258%

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72%

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-42%

13% 25%

-54%

-37%

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-34%

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-30%

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114%

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86%

-42%

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-16%

36%

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-77%

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-31%

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11%

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4%

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103%

17%

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152%

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OPTIMISE TODAY

ACCELERATE TOMORROW