



## Surface and iPad Refreshes Will Keep Tablets Alive, Says IDC

**LONDON, December 10, 2019** — The EMEA tablet market reached 10.9 million units in the third quarter of the year, a drop of 8.2% on the same quarter last year, according to data from International Data Corporation (IDC). The contraction in consumer demand continues to be the main inhibitor of tablet adoption. As consumers lack compelling reasons to refresh their devices, life cycles continuously increase, leading to a market slowdown. However, the deployment of tablets in the commercial segments remains healthy, with a 4.2% YoY increase, due to the larger number of usage scenarios generated by digital transformation.

"In a quarter usually marked by seasonality, where there is a balance between the top two companies, Apple maintained and consolidated its market leadership," said Helena Ferreira, research analyst, IDC Western Europe Personal Computing Devices. "The growing market saturation is driving consolidation, as the top five companies become increasingly dominant, and in developed economies, like in Western Europe, the top five represented more than three-quarters of the market."

The overall tablet market in Western Europe declined 6.0% YoY in 3Q19, while Central and Eastern Europe, the Middle East, and Africa (CEMA) declined 12.0% YoY.

"Slate tablet shipments are continuing to drag down overall tablet results in both CEE and MEA, mostly due to the consumer consumption slowdown and significant drops in below-10in. tablets, due to stiff competition from large-screen smartphones," said Nikolina Jurisic, program manager, IDC CEMA.

### Vendor Highlights

**Apple** retained the market leadership in EMEA, ahead of its product refresh cycle. **Samsung** posted a double-digit decline, as the main focus is on pushing its prosumer S series and driving more profitability. **Lenovo** regained third position, filling the gap left by Huawei's decline. **Huawei** dropped to fourth and continues to suffer from the impact of the ban on consumer confidence. **Amazon** remained in the top 5 and continues to dominate the ultra-low-end price ranges, particularly during promotional periods such as Prime Day in 3Q.

**Top 5 Tablet Companies in EMEA — Shipments, Market Share, and Year-Over-Year Growth**  
**Third-Quarter 2019 (Finals) (Units in Thousands)**

<b>Company</b>	<b>3Q19 Shipments</b>	<b>3Q19 Share</b>	<b>3Q18 Shipments</b>	<b>3Q18 Share</b>	<b>YoY Growth</b>
Apple	2,428	22.2%	2,347	19.7%	3.4%
Samsung	2,053	18.8%	2,521	21.2%	-18.6%
Lenovo	1,207	11.0%	1,148	9.6%	5.1%
Huawei	984	9.0%	1,213	10.2%	-18.9%
Amazon.com	881	8.1%	812	6.8%	8.4%
Others	3,371	30.9%	3,859	32.4%	-12.7%
Total	10,923	100%	11,900	100%	-8.2%

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet), 3Q19*

The EMEA tablet market is forecast to decline by 10.2% YoY in both 4Q and for overall 2019. The dynamics affecting the market, particularly in the consumer segment, are expected to persist both in consumer and the commercial segments in the coming quarters.

"Despite the decline in total units shipped, the tier A vendors will sustain market value, particularly through the most recent iterations of iPad and Surface," said Daniel Goncalves, senior research analyst, IDC Western Europe Personal Computing Devices. "The new iPad with a first party keyboard and a new operating system designed to enhance productivity features in a tablet environment is expected to generate interest among prosumers and to continue boosting renewals of old tablets. On the other hand, the adoption of Surface Pro as a notebook replacement is expected to continue to thrive and to increasingly drive horizontal deployments in enterprise."

The commercial market in EMEA is forecast to grow at a CAGR of 4.6% between 2019 and 2023.

"In the long run, the commercial segment is expected to grow due to the transition to mobility and growing user case scenarios for deploying tablets into businesses," said Jurisic.

**EMEA Tablet Forecast by OS**  
**3Q19 Forecast for 2019 to 2023 (Shipments in Thousands)**

<b>OS</b>	<b>2019 Shipments*</b>	<b>2019 Share*</b>	<b>2023 Shipments*</b>	<b>2023 Share*</b>	<b>2019–2023 CAGR*</b>
Android	29,794	69.6%	25,865	65.6%	-3.5%
iOS	10,242	23.9%	9,639	24.5%	-1.5%
Windows	2,730	6.4%	3,634	9.2%	7.4%
Others	42	0.1%	277	0.7%	60.0%
Total	42,809	100.00%	39,415	100.00%	-2.0%

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet)*, 3Q19

Note: Tablets are portable, battery-powered computing devices inclusive of both slate and detachable form factors. Tablets may use LCD or OLED displays (epaper-based ereaders are not included here). Tablets are both slate and detachable keyboard form factor devices with color displays equal to or larger than 7.0in. and smaller than 16.0in.

**IDC's Quarterly PCD Tracker** provides unmatched market coverage and forecasts for the entire device space, covering PCs and tablets, in more than 80 countries — providing fast, essential, and comprehensive market information across the entire personal computing device market.

For more information on IDC's EMEA Quarterly Personal Computing Device Tracker or other IDC research services, please contact Vice President Karine Paoli on +44 (0) 20 8987 7218 or at [kpaoli@idc.com](mailto:kpaoli@idc.com). Alternatively, contact your local IDC office or visit [www.idc.com](http://www.idc.com).

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