

DigiTimes: Intel Powers White-Box Tablets

Written by Marco Attard
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Intel has a growth opportunity in white-box tablets, DigiTimes Research says-- Chipzilla-powered white-box tablets show "significant" Q4 2014 growth, and should only drop "slightly" (or remain flat) on Q1 2015.



On the other hand similar devices from the likes of MediaTek, Rockchip and Allwinners see "dramatic" Q1 2015 Q-o-Q declines.

As a result DigiTimes forecasts Intel will become the biggest white-box tablet application processor (AP) supplier in H1 2015, with its Bay Trail-T CR processor (not the newly released SoFIA or Core M chipsets) leading such growth.

The analyst attributes the Intel rise among the white-box ranks to 3 factors. First are Microsoft subsidies, since devices smaller than 9-inch receive free Windows licensing while white-box players get non-recurring engineering (NRE) and marketing expenses subsidies for Windows devices since Q4 2014.

The second is Intel subsidies-- from December 2014 Bay Trail-T CR processors cost \$4, leading to device makers ordering large volumes in preparation for Q1 and Q2 2015 shipments.

Last but not least is white-box vendors wanting to diversify into inexpensive (\$150-250) Windows tablets and hybrid 2-in-1s. DigiTimes says such devices will flood the market come Q2 2015, leading to a "great threat" to first-tier brand vendors selling similar products in emerging markets.

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