

## IDC: Tablet Market Continues to Struggle in Q3

Written by Alice Marshall  
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According to IDC, global tablet shipments are down by -8.6% Y-o-Y to reach 36.4 million units in Q3 2018-- with declines in both slate and detachable/hybrid tablet shipments.

Slate tablet shipments account for majority of market with 31.6m units, a -7.9% Y-o-Y decline. Detachable tablets, in the meantime, see a 13.1% Y-o-Y drop on shipments reaching 4.8m.

**Top Five Tablet Companies, Worldwide Shipments, Market Share, and Year-Over-Year Growth, Third Quarter 2018**  
(Preliminary results, combined company view for the current quarter only, shipments in millions)

Company	3Q18 Unit Shipments	3Q18 Market Share	3Q17 Unit Shipments	3Q17 Market Share	Year-Over-Year Growth
1. Apple	9.7	26.6%	10.3	25.9%	-6.1%
2. Samsung	5.3	14.6%	6.0	15.0%	-11.4%
3. Amazon.com	4.4	12.0%	4.4	11.0%	-0.4%
4. Huawei	3.2	8.9%	3.0	7.6%	7.1%
5. Lenovo*	2.3	6.3%	3.1	7.7%	-24.5%
Others	11.5	31.6%	13.1	32.9%	-12.1%
<b>Total</b>	<b>36.4</b>	<b>100.0%</b>	<b>39.9</b>	<b>100.0%</b>	<b>-8.6%</b>
Lenovo (excluding Fujitsu volume in 3Q17)**	2.3	6.3%	3.0	7.4%	-22.1%

Source: IDC Worldwide Quarterly PCD Tracker, November 2, 2018

"The detachable market has failed to see growth in 2018, a worrying trend that has plagued the category off and on since the end of 2016," the analyst says. "In October we finally saw the highly anticipated refreshes of Apple's iPad Pro and Microsoft's Surface Pro, as well as new products by Samsung and Google, which lead us to believe that the last quarter of the year will turn the detachable category around, at least for the time being. Increasingly sparse are new

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products by the top-tier PC OEMs as they remain more focused on their convertible portfolio, a move that will ultimately affect the overall trajectory of the detachable market going forward."

IDC also points out the tablet market is becoming increasingly like the traditional PC market-- both markets move in sync with each other, and the decreasing margins and overall decline (particularly in slate tablets) lead to top 5 vendors capturing a larger share, as many small vendors either exit tablet space or treat the market with "much lower" priority. As for the top 5, only Apple and Samsung invest heavily in tablet innovation and marketing, leading to something of a market duopoly.

It comes to no surprise Apple continues to lead the tablet market in Q3 2018, even as shipments are down by -6.1% Y-o-Y to reach 9.7m. The March 2018 lower-cost iPad refresh helped drive volumes, although it was unable to maintain the same momentum from Q3 2017. iPad Pro shipments see declines, the result of the upcoming refresh, which should boost tablet results for Apple in Q4 2018.

Samsung takes 2nd place with shipments reaching 5.3m, a -11.4% Y-o-Y decline. The company sees "modest" growth in detachables, even if such growth is outweighed by slate declines. Samsung also faces pressure in the lower and mid-market segments, as competitors offer a better value slate proposition. One such company is Amazon, whose Prime Dale sales drove it ahead of Huawei and Lenovo, a pattern the company should repeat on Q4 2018.

Huawei is the only company to see growth on Q3 2018 with shipments reaching 3.2m, a 7.1% Y-o-Y increase. The company has particularly strong results in Europe and S. America. Rounding the top 5 is Lenovo, with shipments dropping by 25% Y-o-Y to 2.3m as it shifts focus from tablets to the traditional PC market.

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