

IDC: Surface, iPad Refreshes Keep EMEA Tablets Alive

Written by Frederick Douglas
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EMEA tablet shipments total 10.9 million units in Q3 2019, IDC reports-- a -8.2% Y-o-Y drop brought about by the continued contraction of the consumer segment, even if demand remains healthy on the commercial side.

In fact, while consumers still lack compelling reasons to refresh devices, enterprise tablet shipments see a 4.2% Y-o-Y increase due to a digital transformation bringing a larger number of usage scenarios.

Top 5 Tablet Companies in EMEA — Shipments, Market Share, and Year-Over-Year Growth

Third-Quarter 2019 (Finals) (Units in Thousands)

Company	3Q19 Shipments	3Q19 Share	3Q18 Shipments	3Q18 Share	YoY Growth
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

"In a quarter usually marked by seasonality, where there is a balance between the top two companies, Apple maintained and consolidated its market leadership," the analyst remarks. "The growing market saturation is driving consolidation, as the top 5 companies become increasingly dominant, and in developed economies, like in W. Europe, the top 5 represented more than 75% of the market."

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The overall Q3 2019 tablet market is down by -6% Y-o-Y in W. Europe, while CEMA sees a 12% Y-o-Y decline. Slate tablet shipments continue to drag down overall results in both CEE and MEA, mainly due to consumer consumption slowdown and "significant" drops in tablets under 10-inch in size, the result of competition from larger-screen smartphones.

Moving on to the vendors, Apple retains EMEA leadership ahead of the product refresh cycle. Samsung posts a -18.6% Y-o-Y decline as it shifts focus on the prosumer S series and driving more profitability. Lenovo returns to 3rd place, filling the gap left by a declining Huawei. The Chinese continues to suffer the impact of the ban on consumer confidence. Amazon remains in 5th place as it dominates the ultra-low price ranges during promotional periods such as Prime Day.

Looking on to the future, IDC predicts tablet shipments will drop by -10.2% Y-o-Y in Q4 2019. The overall decline should also clock at -10.4% for overall 2019. The dynamics affecting the market, particularly the consumer segment, should continue to persist in both consumer and commercial segments in the current quarters, with only tier A vendors sustaining market value. IDC points out the most recent iterations of the iPad and Surface as successful tablets, as both make attractive purchases for businesses in want of notebook replacements.

The analyst forecasts the EMEA commercial tablet market is to grow at a CAGR of 4.6% during the 2019-2023 period, thanks to the transition to mobility and growing user case scenarios for business tablet deployment.

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