Apple Strengthens Position in EMEA Tablet Market as New Releases Lead to Q2 Rebound in Detachables, Says IDC

LONDON, September 11, 2019 — According to the latest figures published by International Data Corporation (IDC), the overall EMEA tablet market declined 11.7% YoY, shipping 9.6 million units in 2019Q2. The ongoing erosion of consumer demand for slate tablets remains the primary reason for the contraction, and a lack of innovative features and the increasing range of devices in the market are inhibiting tablet renewal. The good news for Q2, however, is the strong performance of detachables, which increased 11.8% after two years of consecutive quarterly declines.

"The expectation of a detachable rebound in the market was finally realized in Q2 and on a bigger scale than anticipated," said Daniel Goncalves, senior research analyst, IDC Western European Personal Computing Devices. "This was mainly driven by shipment pull-in of the freshly released iPad Air, a budget alternative to the iPad Pro and a contender to the Surface Go in the midrange tablet market with keyboard capabilities that have the potential to become a back-to-school winner."

The overall tablet market in Western Europe declined 6.6% YoY in 2019Q2, while Central and Eastern Europe, the Middle East, and Africa (CEMA) declined 18.7% YoY. "As content consumption tasks performed by consumers have moved to bigger screen size smartphones, 7in. and 8in. tablets become less relevant," said Nikolina Jurisic, product manager, IDC CEMA.

Vendor Highlights

Apple retained market leadership in EMEA, with the help of a buoyant detachable quarter and the resurrection of the mini. **Samsung** declined but continues to push its higher-end Android tablets across the region, highlighting its greater focus on profitability. **Huawei** contracted as the shockwaves from the ban in the U.S. intensified in Q2 and had a negative impact on the brand's consumer confidence, particularly in Western Europe. Huawei held on to third place, however, and gained leadership in the CEMA region. **Lenovo**, continuing to shift its focus from tablets, posted another sharp decrease. **Amazon** updated its affordable Fire tablet range ahead of Prime Day, boosting its shipments in Q2.

Top 5 Companies: EMEA
2019Q2 (Finals) (000 Units)

Company	2019Q2 Shipments	2019Q2 Share	2018Q2 Shipments	2018Q2 Share	YoY Growth
Apple	2,408	25.1%	2,374	21.9%	1.5%
Samsung	1,995	20.8%	2,304	21.2%	-13.4%
Huawei	1,141	11.9%	1,420	13.1%	-19.6%
Lenovo	831	8.7%	957	8.8%	-13.2%
Amazon.com	435	4.5%	283	2.6%	53.7%
Others	2,778	29.0%	3,515	32.4%	-21.0%
Total	**9,588**	**100%**	**10,854**	**100%**	**-11.7%**

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet)*, 2019Q2

The EMEA tablet market is forecast to decline by 7.4% in the third quarter of the year and by 9.9% for overall 2019, maintaining the trend seen in recent years. Detachables and the commercial segment, however, are expected to partially offset the decline in slates in consumer.

"The second half of 2019 will remain inhibited as slates continue to decline across regions," said Jurisic. "In comparison, detachables are expected to perform slightly better. The economic revival, stronger consumer and commercial confidence, and new and attractively priced products are expected to positively influence the market."

The adoption of tablets in the commercial segment is expected to grow from 2020, driven primarily by detachables, as slates will remain relatively stable. "In 2019, we expect to see a return to growth for detachables in enterprise and a jump from 2020 with double-digit growth," said Goncalves. "The good performance in Q2 might just be the beginning, as the workforce becomes increasingly mobile and the increase in the Windows 10 installed base contributes to the expansion of ultraportable systems."

Tablets are expected to increase at a CAGR of 4.7% in the commercial segment from 2019 to 2023.

EMEA Tablet Forecast by OS
2019Q2 Forecast for 2019 to 2023 (Shipments in Thousands)

Product	2019 Shipments*	2019 Share*	2023 Shipments*	2023 Share*	2019–2023 CAGR*
Android	29,918	69.6%	26,578	65.8%	-2.9%
Chrome OS	42	0.1%	277	0.7%	60.1%
iOS	10,139	23.6%	9,802	24.3%	-0.8%
Linux	3	0.0%	7	0.0%	24.7%
Windows	2,857	6.7%	3,735	9.2%	6.9%
Total	**42,959**	**100%**	**40,399**	**100%**	**-1.5%**

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet)*, 2019Q2

* 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 7in. and smaller than 16in.

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. Alternatively, contact your local IDC office or visit www.idc.com.

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