Tablet Market Outlook for 2020 Is Bleak, but Rebound Expected in 2021, Says IDC

LONDON, May 27, 2020 — According to International Data Corporation (IDC), in the first quarter of 2020 the overall tablet market in EMEA reached 8.8 million units, declining 9.6% YoY. Despite the increase in the commercial segment sustained by the demand for mobile solutions to address the needs of working and schooling from home, it was not enough to offset the weakness in the consumer segment.

"The factory shutdown in China brought manufacturing and logistical supply chain problems to the market, meaning a spike in demand could not be met," said Helena Ferreira, research analyst, IDC Western Europe Personal Computing Devices. "Although the first quarter of the year is generally not marked by strong seasonality in education, some Android vendors, such as Samsung and Lenovo, as well as Apple, faced increased demand in this segment. However, the impact of the supply chain constraints has created backlogs for the coming quarters."

In Western Europe, the overall tablet market in the first quarter of the year performed better than in other regions in EMEA, despite a decline of 5.7% YoY. The CEMA region, comprising Central and Eastern Europe (CEE) and the Middle East and Africa (MEA), decreased 16.0% YoY.

"In the first quarter of the year, CEE and MEA recorded an annual market decrease of 24.5% and 9.9% respectively," said Nikolina Jurisic, senior program manager, EMEA. "Besides cannibalization from large-screen smartphones and weak consumer demand, the tablet market was affected by lockdowns imposed in CEMA countries. Tablets are not the first-choice devices for home-working and home-schooling during lockdown period."

Vendor Highlights

Samsung remained the market leader in EMEA, sustained mainly by the MEA region with double-digit growth. Apple retained second position in EMEA, but the popularity of its devices in the most developed economies made it number 1 in Western Europe. Huawei held third position, as the vendor responds to the weakening of its phone business in EMEA following the ban by pushing other categories. Lenovo was fourth in EMEA and continued to increase its growth in the education sector across the most developed economies. The good traction for Microsoft Surface devices in the enterprise sector drove the vendor into the top 5 in EMEA.

Figure 1

Top 5 Tablet Companies in EMEA — Shipments, Market Share, and Year-Over-Year Growth
First-Quarter 2020 (Finals) (Shipments in Thousands)

Company	1Q20 Shipments	1Q20 Share	1Q19 Shipments	1Q19 Share	YoY Growth
Samsung	2,161	24.5%	2,212	22.7%	-2.3%
Apple	2,100	23.8%	2,314	23.7%	-9.3%
Huawei	1,085	12.3%	1,140	11.7%	-4.8%
Lenovo	671	7.6%	644	6.6%	4.2%
Microsoft	351	4.0%	294	3.0%	19.6%
Others	2,455	27.8%	3,153	32.3%	-22.1%
Total	8,823	100%	9,756	100%	-9.6%

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet)*, 1Q20

The outlook for the tablet market in EMEA was revised significantly downwards in 2020. The market is expected to drop 8.8% in calendar 2Q20, with a 20% YoY decline expected in the second semester. The tablet market is expected to benefit somewhat from the lockdowns in 2Q, though not to the same extent as PCs. However, this is not anticipated to offset the complete shutdown of the high street and the deterioration in consumer sentiment. The economic effects of the pandemic will drive the market further down in the second half of 2020.

"The second half of 2020 is expected to be affected by economic slowdown or recession, a rise in unemployment, weak and unstable oil prices, and weak local currencies translating into soft consumer and commercial sentiment," said Jurisic.

A rebound is expected in 2021, with the EMEA tablet market forecast to grow 3% YoY, driven particularly by the strongest Western European economies.

"Despite the bleak outlook for 2020, this period of confinement brought to light the urgency of accelerating digital transformation, which can have a positive impact on tablet adoption in the commercial segment going forward," said Daniel Goncalves, research manager, IDC Western Europe Personal Computing Devices. "In the short term for tablets, this is likely to push forward digitization projects in education across the region. The category remains important in primary education, and local authorities will certainly want to be ready to address a possible second wave of the pandemic."

Figure 2

EMEA Tablet Forecast by OS

1Q20 Forecast for 2020–2024 (Shipments in Thousands)

OS	2020 Shipments*	2020 Share*	2024 Shipments*	2024 Share*	2020–2024 CAGR*
Android	25,475	69.1%	23,219	65.8%	-2.3%
iOS	9,072	24.6%	9,189	26.0%	0.3%
Windows	2,288	6.2%	2,871	8.1%	5.8%
Others	8	0.1%	41	0.1%	48.85%
Total	36,843	100.00%	35,319	100.00%	-1.1%

Source: *IDC EMEA Personal Computing Device Quarterly Tracker (Tablet)*, 1Q20

Note: Tablets are portable, battery-powered computing devices inclusive of both slate and detachable form factors. Tablets may use LCDs 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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