

## IDC: W. European Tablet Market "Almost" Returns to Growth

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According to IDC the contraction of the W. European tablet market felt on Q2 2017 is of "just" -0.5% Y-o-Y as shipments reach 70 million units, an "almost complete recovery of the market in the region."

Driving such recovery are Apple tablets and improvement in the macroeconomic situation of several countries. In general, detachable see 1% Y-o-Y growth, while regular slate tablets show "resilience" with a decrease of just -1% Y-o-Y. Interestingly, the commercial segment shows positive 2.8% Y-o-Y growth, mainly driven by Apple and Android-based detachables (whose growth is 29.3% and 34.9% Y-o-Y respectively).

| Top 5 Companies: Western Europe* — 2017Q2 (Finals) (000 Units) |                  |                  |              |              |            |
|----------------------------------------------------------------|------------------|------------------|--------------|--------------|------------|
| Company                                                        | 2016Q2 Shipments | 2017Q2 Shipments | 2016Q2 Share | 2017Q2 Share | YoY Growth |
| Apple                                                          | 1,699            | 1,902            | 24.0%        | 27.0%        | 12.0 %     |
| Samsung                                                        | 1,516            | 1,647            | 21.4%        | 23.4%        | 8.6%       |
| Lenovo                                                         | 542              | 628              | 7.7%         | 8.9%         | 15.8%      |
| Amazon.com                                                     | 346              | 308              | 4.9%         | 4.4%         | -11.1%     |
| Huawei                                                         | 222              | 274              | 3.1%         | 3.9%         | 23.5%      |
| Others                                                         | 2,751            | 2,278            | 38.9%        | 32.4%        | -17.2%     |
| Total                                                          | 7,077            | 7,038            | 100.0%       | 100.0%       | -0.5%      |

Source: IDC Western Europe Personal Computing Device Quarterly Tracker (Tablet), 2017Q2

"Detachables are showing particularly strong growth within the corporate business, facilitated by

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the introduction of more commercially oriented models," the analyst remarks. "These models are geared toward operating primarily as a portable PC with the secondary benefit of a tablet, helping to compete against the growing commercial trend toward the adoption of convertibles."

On the other hand the consumer segment remains negative, even if results are better after a couple of years of "dramatic" declines. This due mainly to the new, attractively priced, iPad leading Apple slate tablet growth of 27% Y-o-Y, and as a result the segment stabilised at a decline of just -1% Y-o-Y.

The back-to-school period in some countries, especially the Nordics, bolstered the market in public space, leading to 37% Y-o-Y growth. Android-based devices are popular with both SMBs and large enterprises, with growth reaching 16.2%.

In the vendor rankings, Apple leads the W. European tablet market with 27% market share and 12% Y-o-Y growth, thanks to the release of the new iPad and iPad Pro. Samsung comes 2nd, with 23.4% market share and 8.6% Y-o-Y growth driven by the Galaxy Tab S2 and new Galaxy Book detachable.

In 3rd place is Lenovo, whose market share is up by 1.2 percentage points to reach 8.9%. Growth is also solid at 15.8% Y-o-Y, with strong performance is Android-based slates, especially in the SMB segment. Amazon comes 4th due to a portfolio of new slates and an expansion of Alexa services in the UK, even if growth is negative (-11.1% Y-o-Y) and market share totals 4.4%. Huawei enters the top 5 at 5th place, with 3.9% market share and 23.5% Y-o-Y growth.

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