

# Global Tablet Tracker, 1Q14

**DIGITIMES Research**  
**Global data tracker**

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# Introduction

- Global tablet benefiting from holidays.
- Apple and Samsung shortage of tablets during the holidays in the fourth quarter.
- With Samsung and other makers' tablets.
- In 2013, first quarter global tablet shipment quickly to reach makers shipment showing that.
- In the first quarter has entered shipment demand.
- Apple will first quarter shipment Lenovo, air quarter to be.
- Apple turning adoption of 2014. Market tablet AP shipment the quarter.
- Taiwan market global shipments.



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# Global tablet market analysis

# Key factors affecting tablet shipments in 4Q13 (Supply side)

Factors	Item	Analysis	Influence on shipments
Manufacturing	Panel	Supply of the iPad mini with Retina's high definition displays	
	CPU/Memory	W	
	OS update	W	
	Assembly	Le the	
Subsidies	Windows tablets	Mi W	
	Android on x86	Int ho pla	
Products	iPad Air	De shi	
Brand vendors	New products	Ap the As in	
	New vendors	LG, Dell and Nokia entered the tablet competition	1★

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Note: The more stars, the higher the influence. ↓ indicates negative influence, ↑ indicates a positive influence.

# Key factors affecting tablet shipments in 4Q13 (Supply side)

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# Key factors affecting tablet shipments in 4Q13 (Demand side)

Factors	Item	Analysis	Influence on shipments
Markets	Europe/North America	Content only available for DIGITIMES Research data tracker customers	
	Emerging markets		
	The year-end holidays		
	Product lifecycle		
	Substitution		
Promotions	Price cuts		
	Samsung telecom service bundling strategy		

Note: The more stars, the higher the influence. ↓ indicates negative influence, ↑ indicates a positive influence.

# Key factors affecting tablet shipments in 4Q13 (Demand side)

- Europe suffering from economic downturn. Markets are
  - The economy in Asia, India and other emerging markets is struggling to rebound. Tablets are still a premium product in these markets.
- Retailers are reluctant to stock up on tablets during the holiday season. Retailers are reluctant to stock up on tablets during the holiday season. Retailers are reluctant to stock up on tablets during the holiday season.
- Samsung's market share is being eroded by other manufacturers. Samsung's market share is being eroded by other manufacturers. Samsung's market share is being eroded by other manufacturers.
- Apple's market share is being eroded by other manufacturers. Apple's market share is being eroded by other manufacturers. Apple's market share is being eroded by other manufacturers.
- Service providers are offering attractive deals for service subscriptions. Service providers are offering attractive deals for service subscriptions. Service providers are offering attractive deals for service subscriptions.

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# Key factors affecting tablet shipments in 1Q14

Factors	Item	Analysis	Influence on shipments
Supply: Android on x86	Bay Trail-T	Bay Trail-T...	
	Dual OS	Ver... unc...	
Supply: Brand vendors	Samsung	Sa... hig...	
	Apple	iPa... on...	
	Lenovo	Wil...	
	Acer	Co...	
Demand: Markets	Microsoft	Wa... Su...	
	Seasonality	We...	
	Emerging markets	Ind... sta...	
	White-box players	Wit... orc...	
	Tablet with phone function	Demand from emerging markets remain strong	★★

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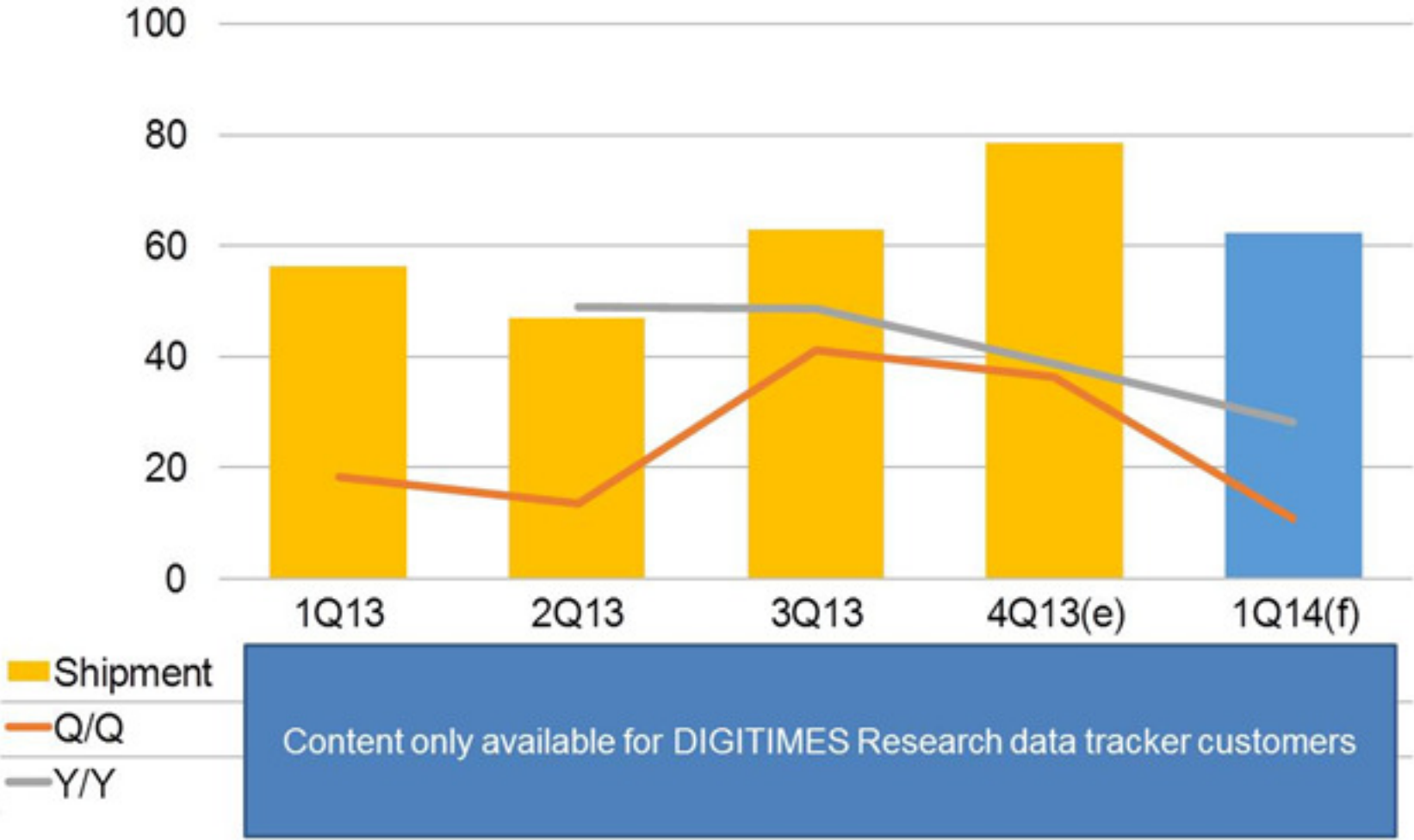


# Key factors affecting tablet shipments in 1Q14

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- Samsung's new models are expected to drive tablet shipments in 1Q14, but the company's market share is still low. Samsung's market share is still low, and the company's market share is still low.
  - With the introduction of the iPad mini, Apple's market share is expected to increase. Apple's market share is expected to increase, and the company's market share is expected to increase.
  - Weak demand from emerging markets is expected to impact tablet shipments in 1Q14. Weak demand from emerging markets is expected to impact tablet shipments in 1Q14, and the company's market share is expected to increase.
- Shipments in the first quarter are expected to be impacted.

# Global tablet shipments 1Q13-1Q14 (m units)



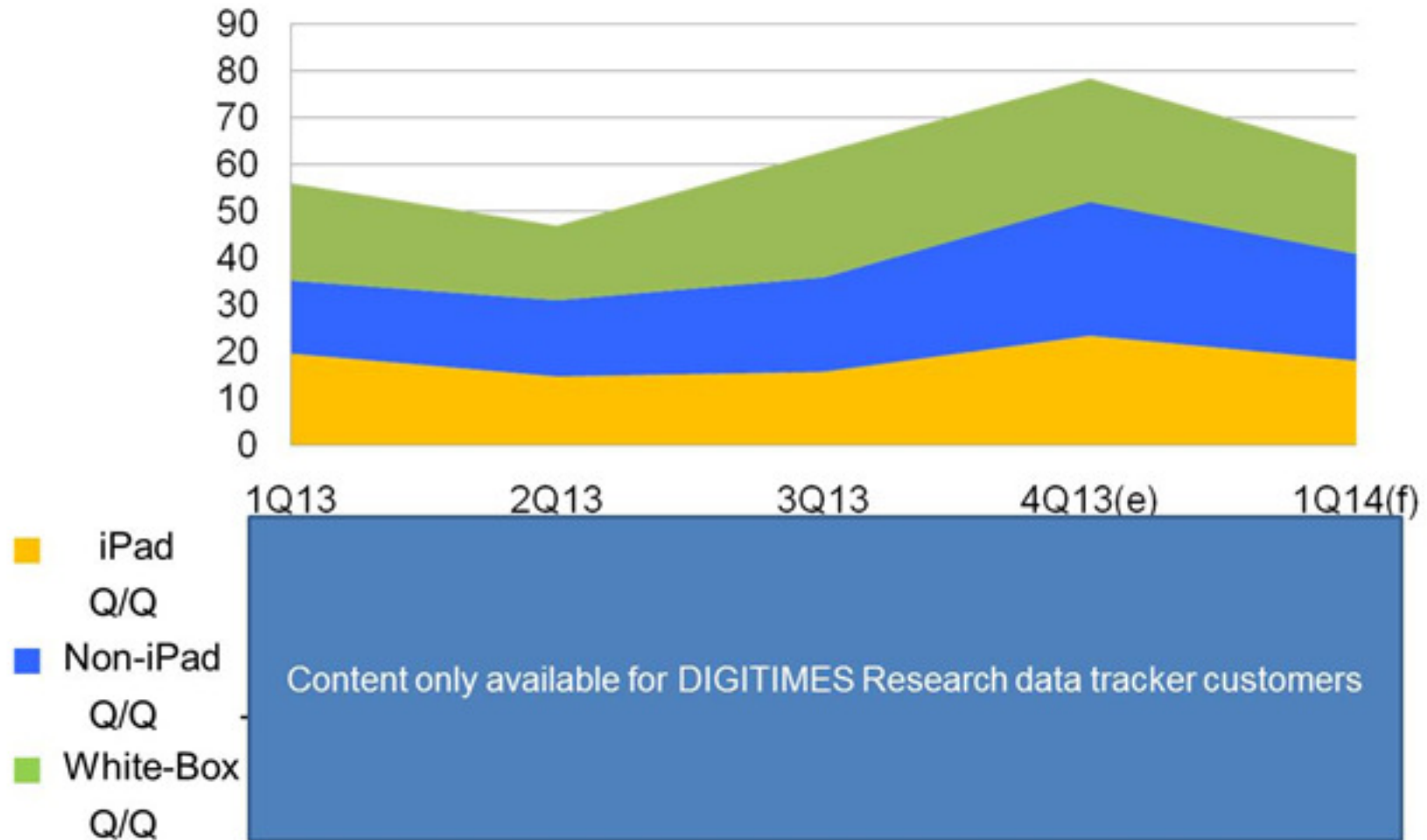
# Global tablet shipments 1Q13-1Q14 (m units)

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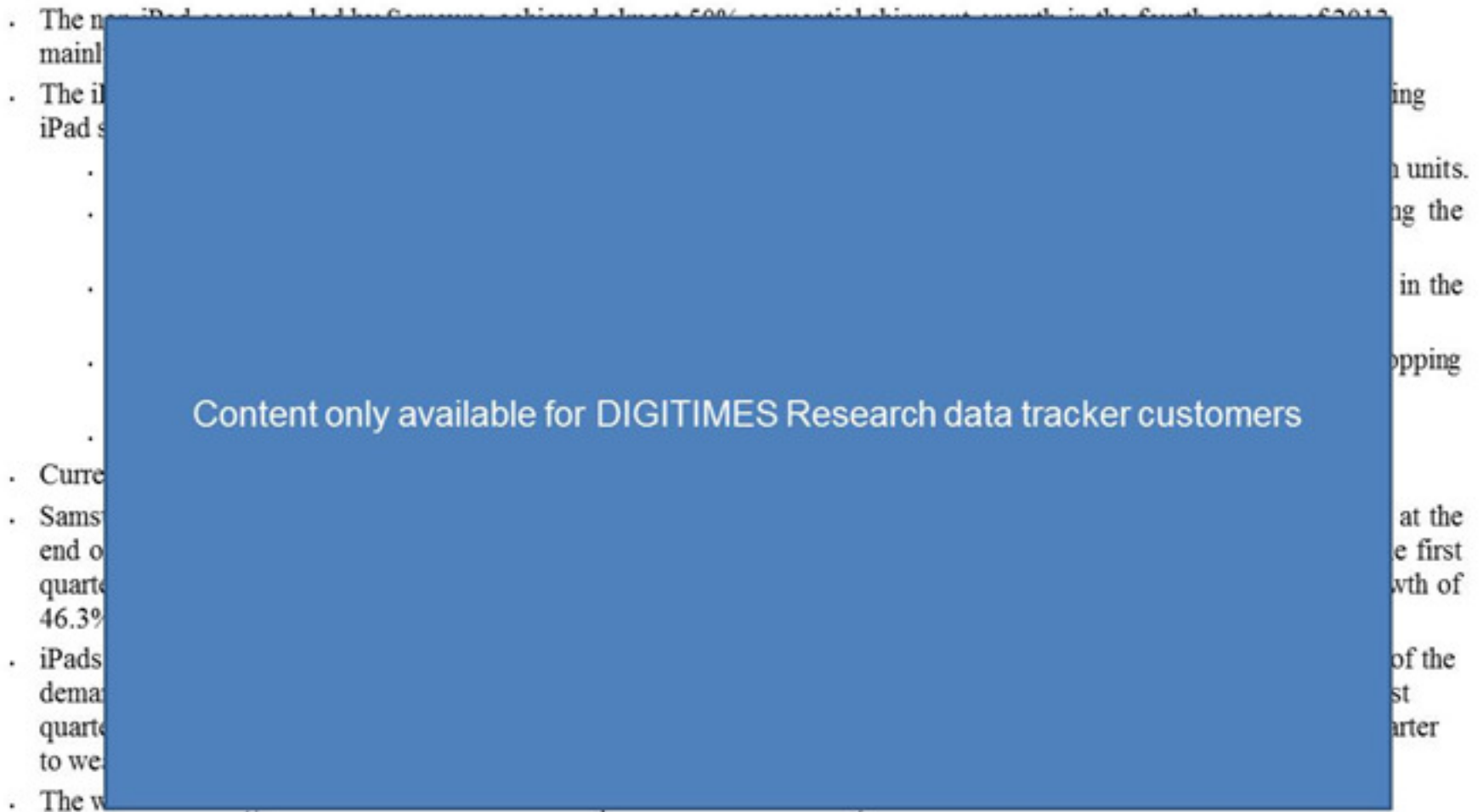
- Global tablet shipments in the fourth quarter of 2012 grew strongly as a result of the US economic recovery.
- Competition in the market had a less significant impact on global shipments.
- The first quarter as the market will enter the traditional slow season.

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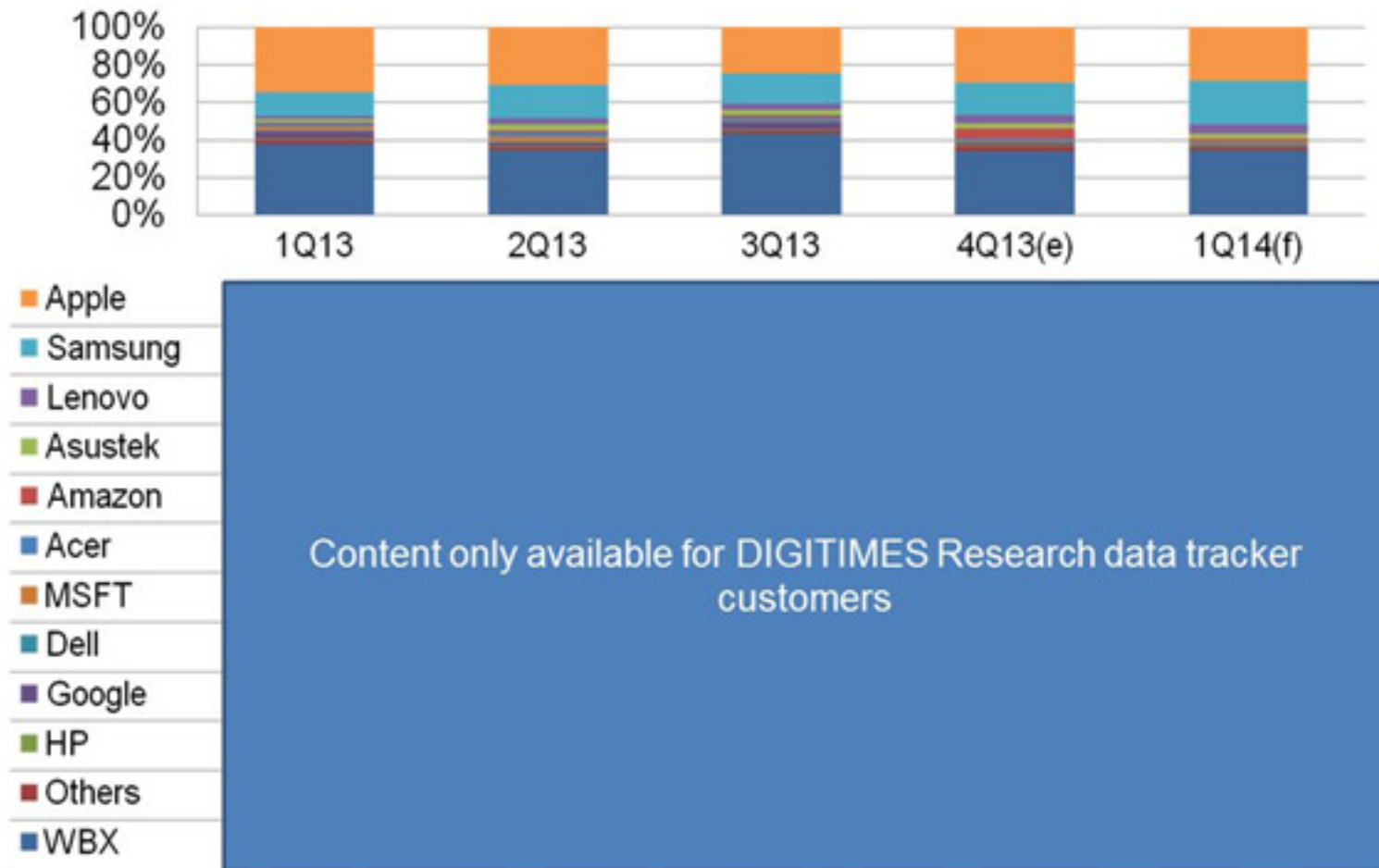
# Shipments by product: iPad, non-iPad branded and white-box, 1Q13-1Q14 (m units)



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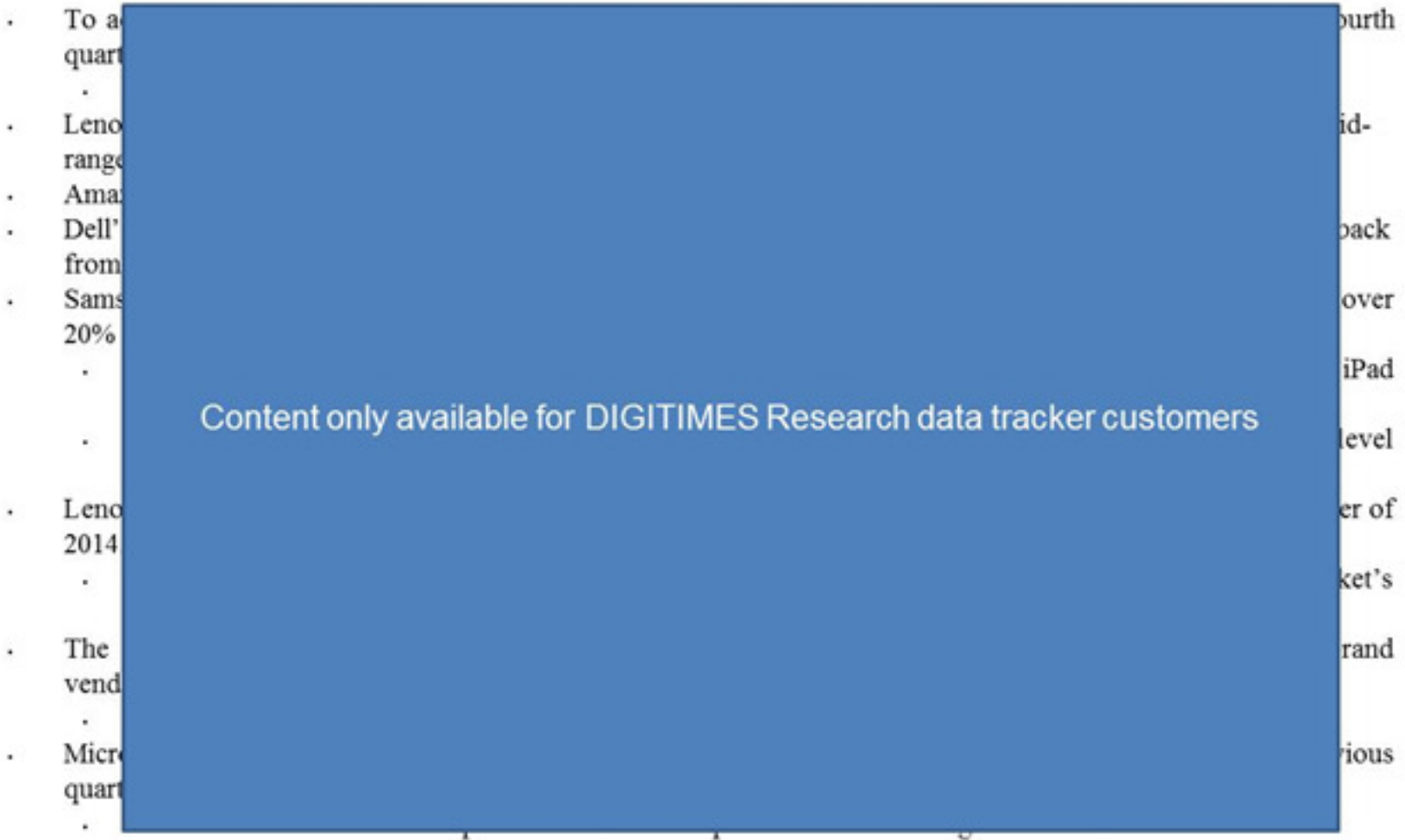
# Shipment share by vendor, 1Q13-1Q14



\*Note: Google and its brand vendor partners' jointly developed tablets are included in Google's shipments

# Shipment share by vendor, 1Q13-1Q14

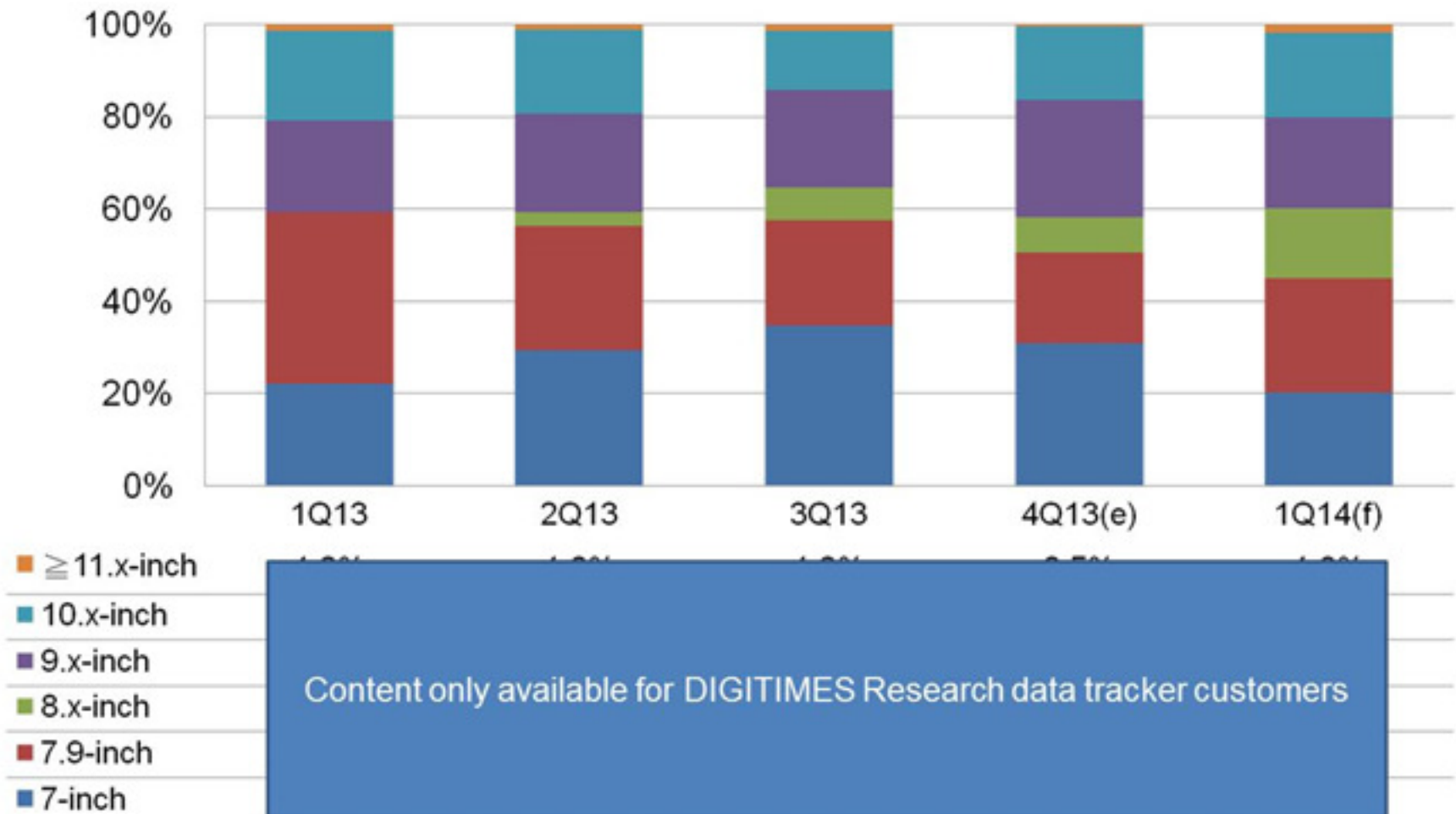
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# Branded tablet market



# Shipment share by panel size, 1Q13-1Q14

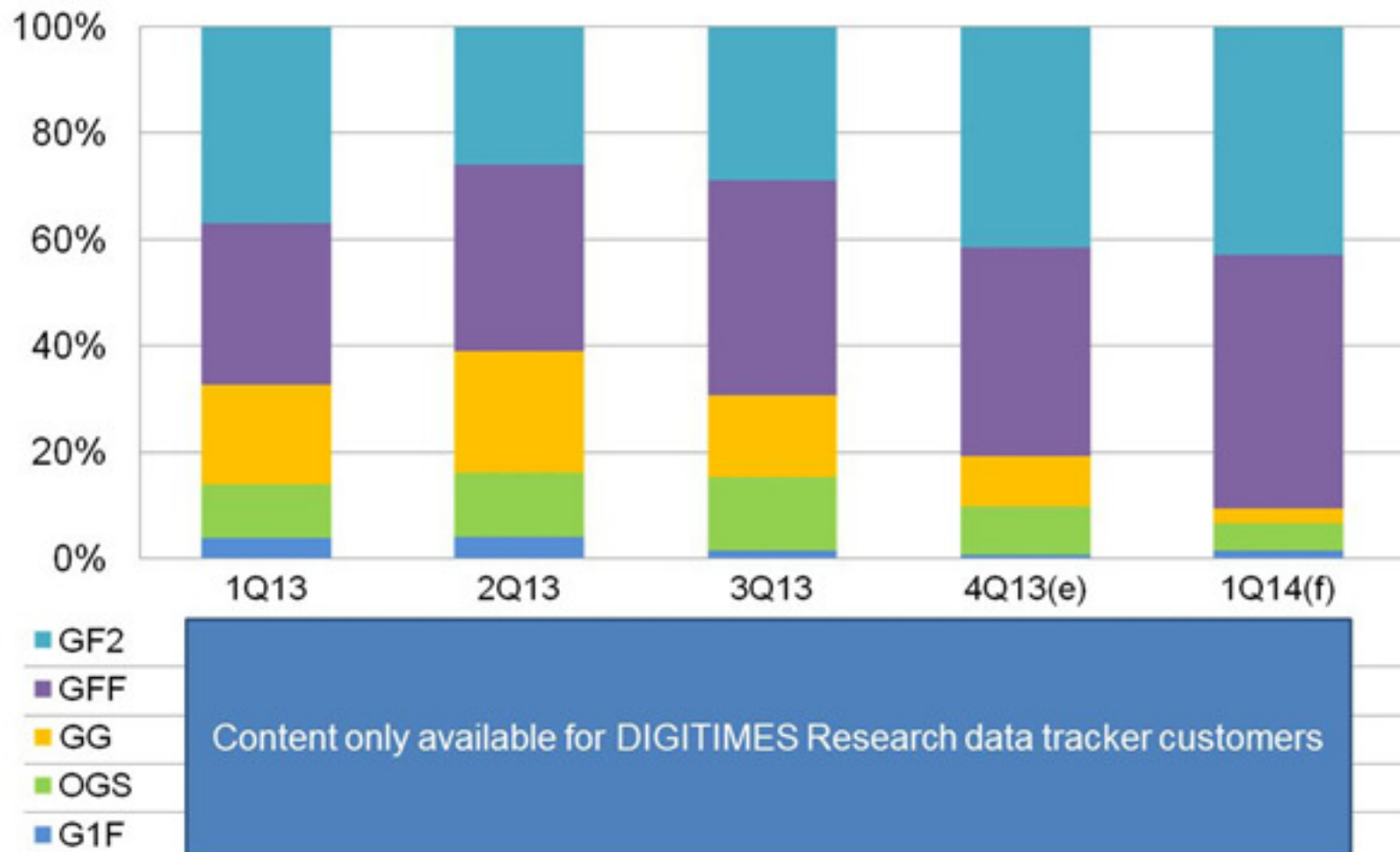


# Shipment share by panel size, 1Q13-1Q14

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# Shipment share by touchscreen technology, 1Q13-1Q14

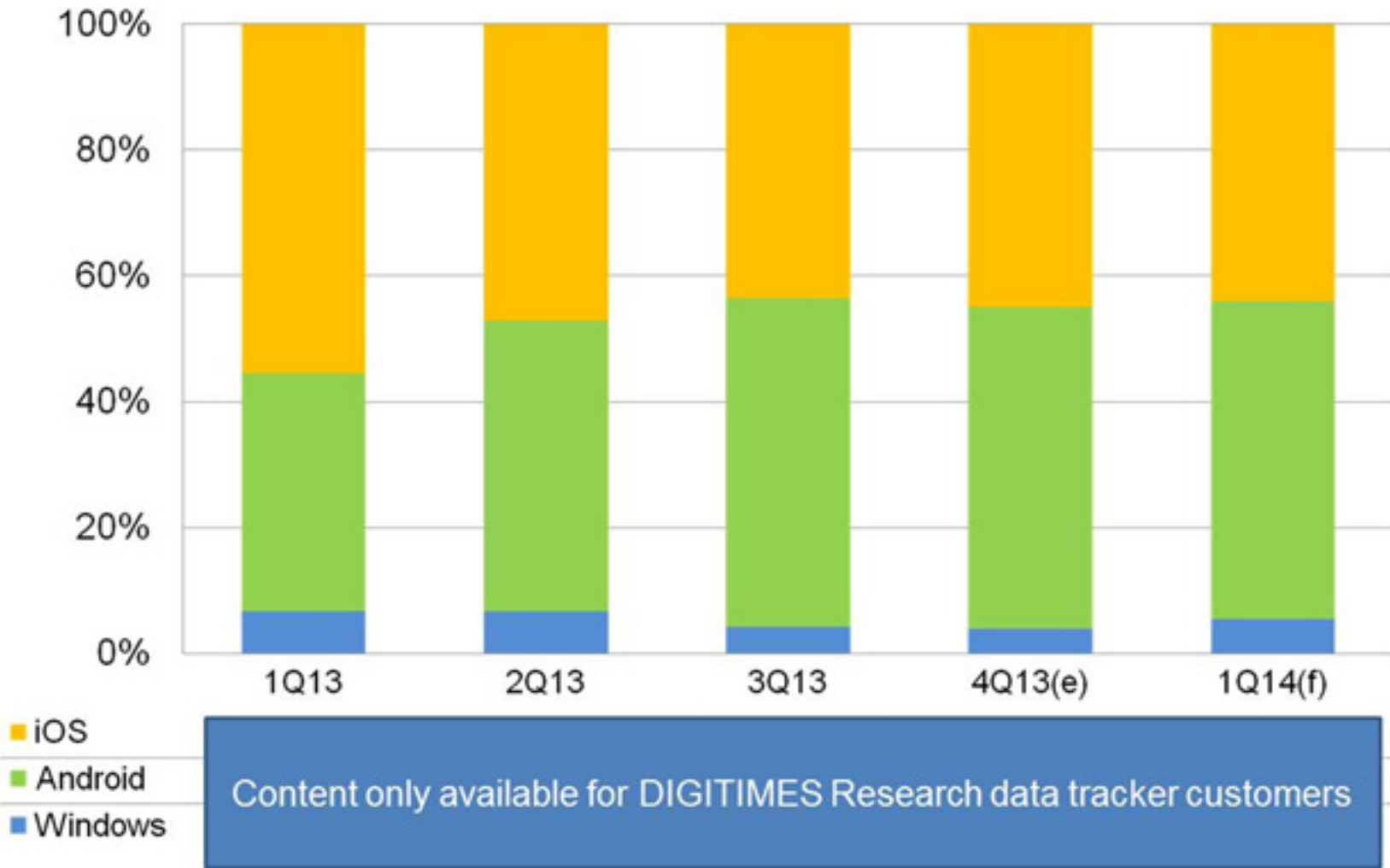


# Shipment share by touchscreen technology, 1Q13-1Q14

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# Shipment share by OS, 1Q13-1Q14

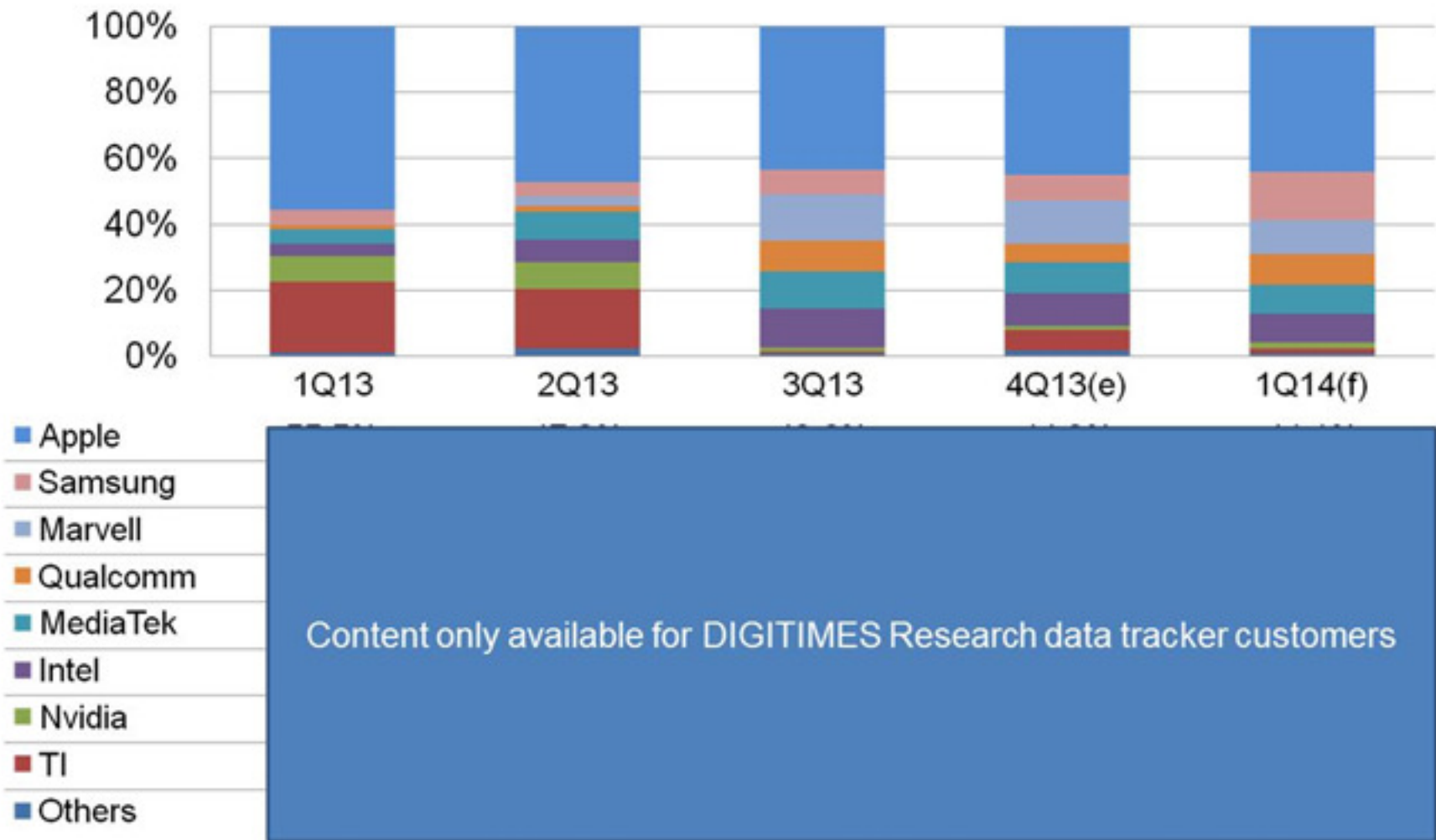


# Shipment share by OS, 1Q13-1Q14

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# Shipment share by AP supplier, 1Q13-1Q14



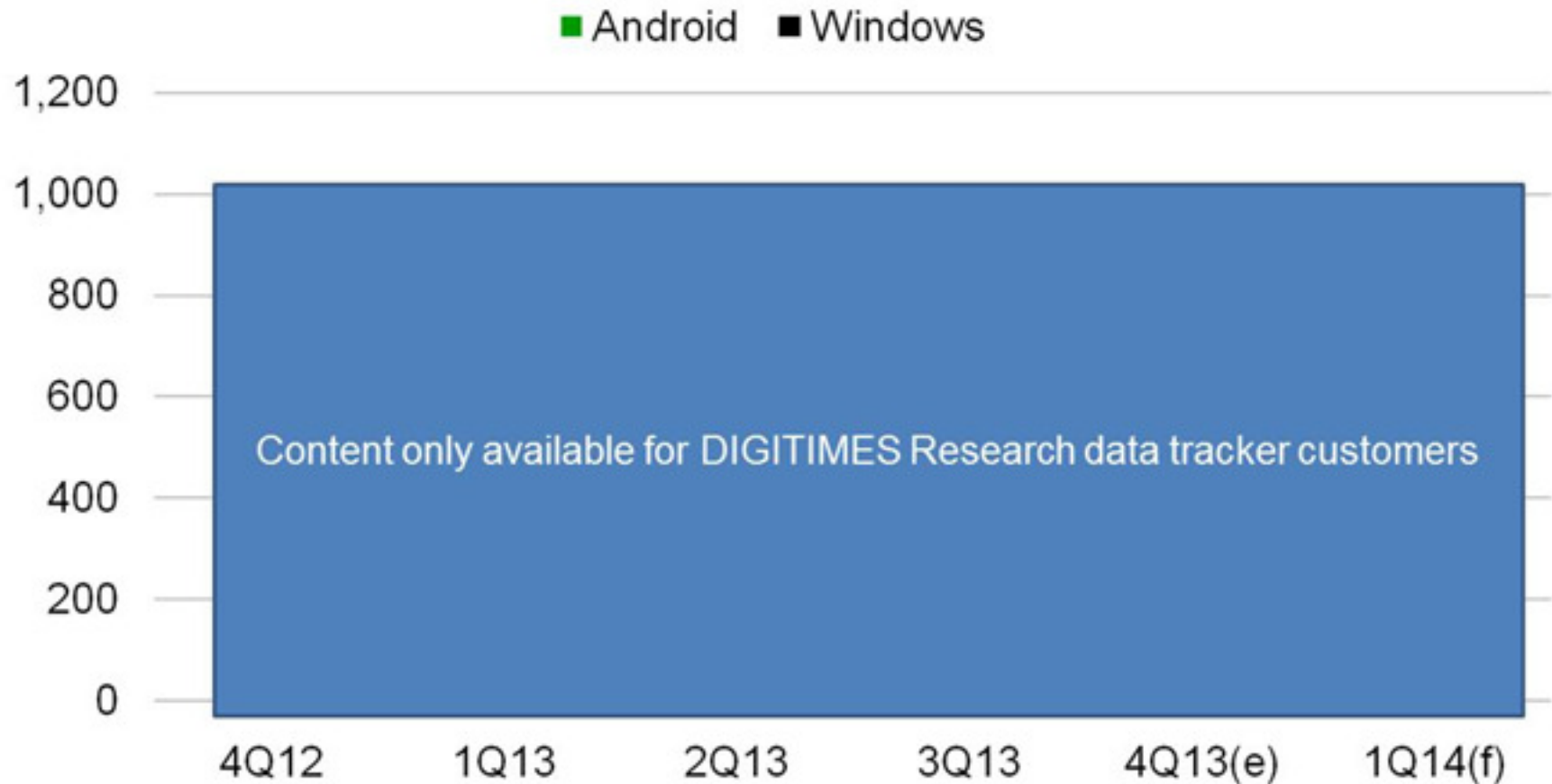
# Shipment share by AP supplier, 1Q13-1Q14

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# Shipments of detachable notebooks by OS, 4Q12-1Q14 (k units)



# Shipments of detachable notebooks by OS, 4Q12-1Q14 (k units)

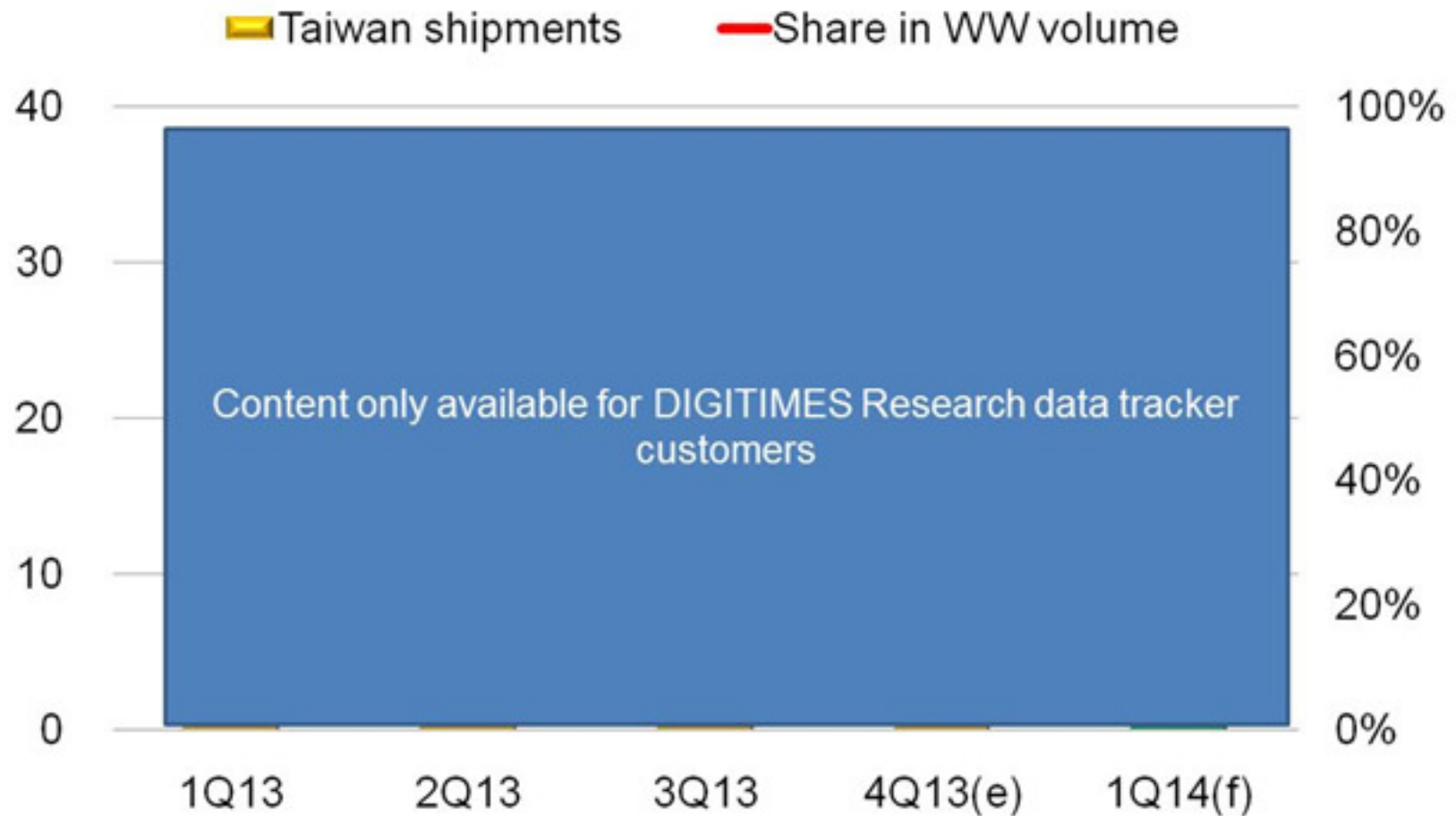
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• DIGITIMES Research defines detachable notebooks as tablets and include

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# Shipment from Taiwan makers and share of global shipments, 1Q13-1Q14 (m units)

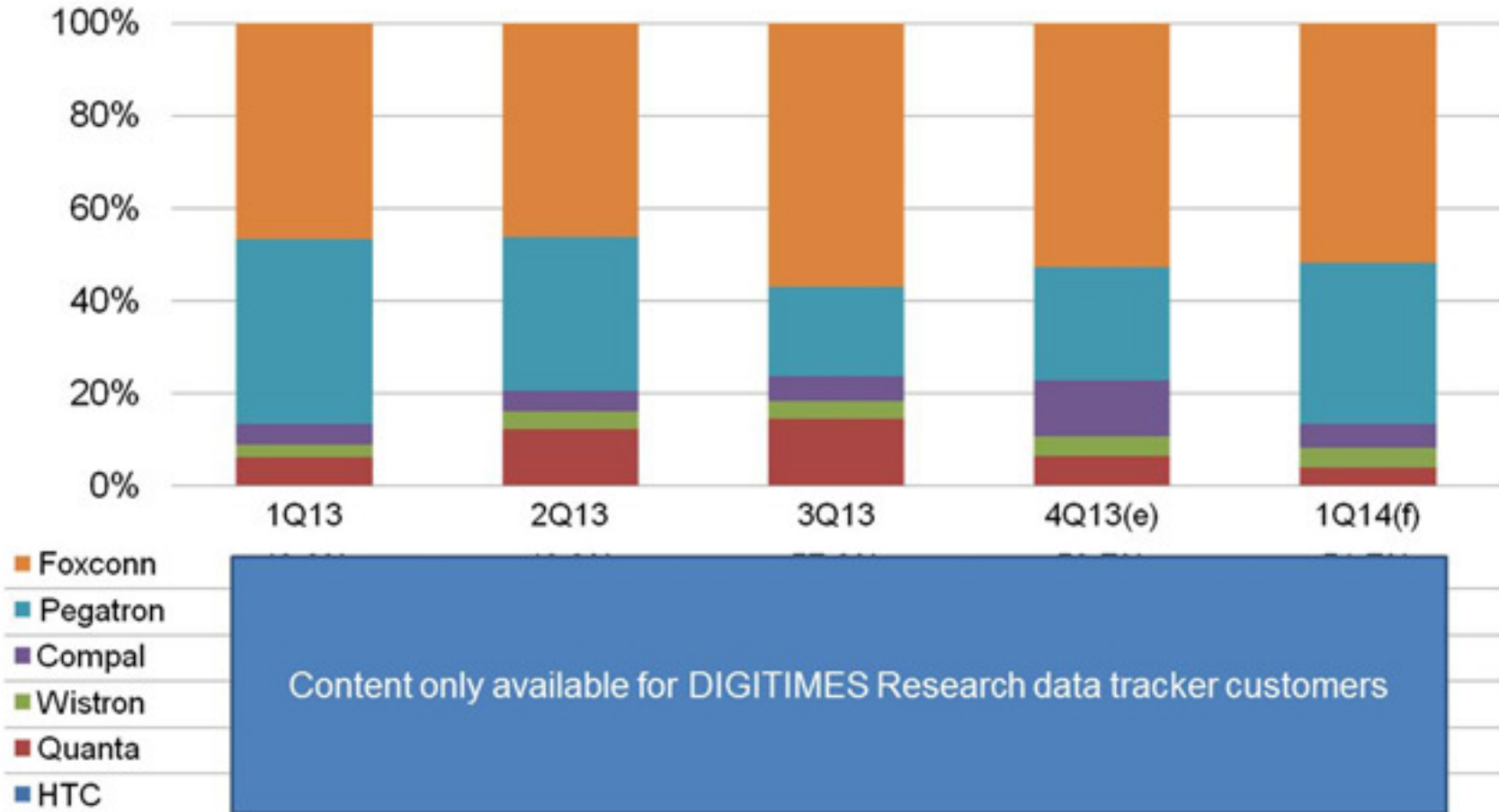


# Shipment from Taiwan makers and share of global shipments, 1Q13-1Q14 (m units)

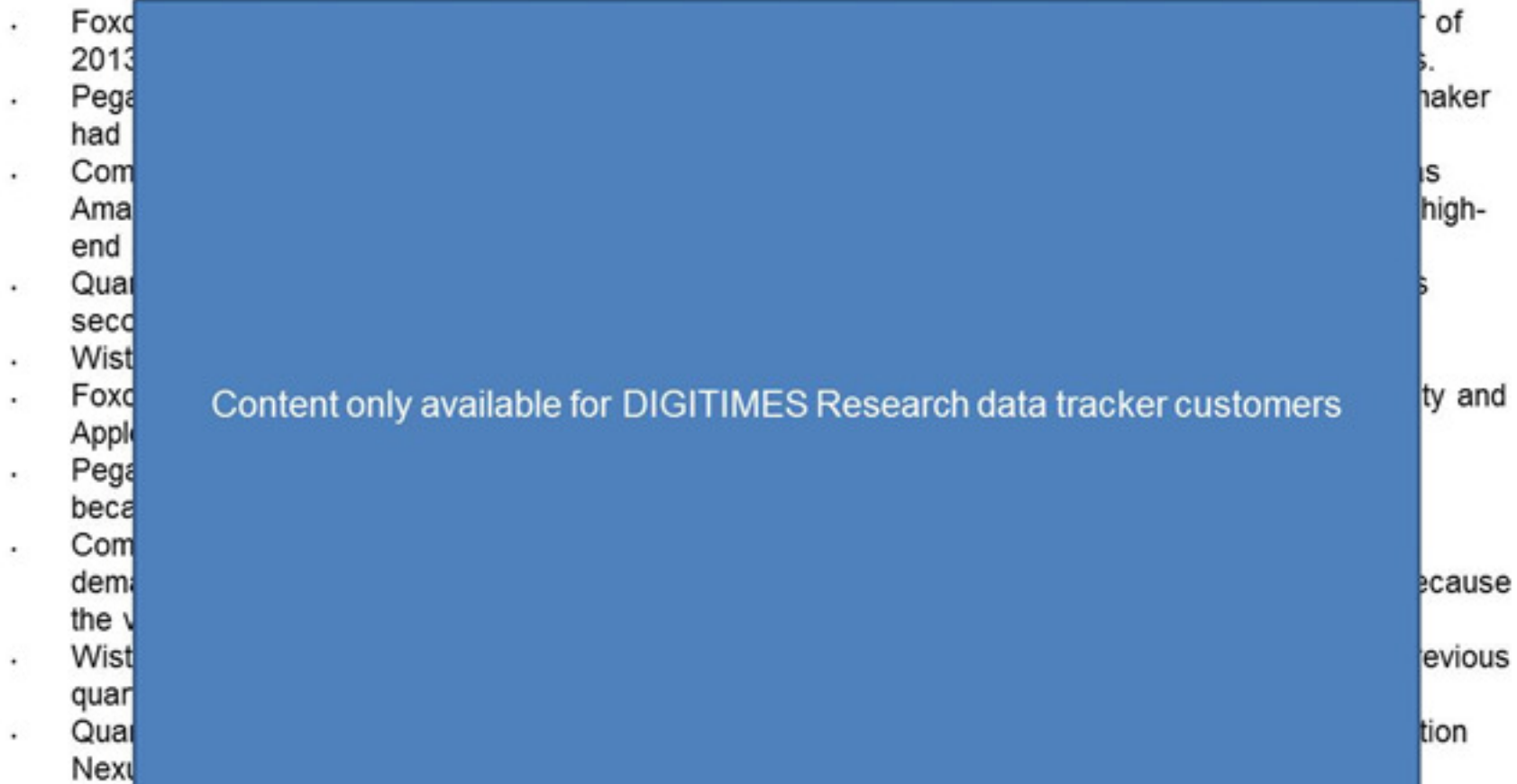
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# Taiwan tablet shipment share by maker, 1Q13-1Q14



# Taiwan tablet shipment share by maker, 1Q13-1Q14



# Review of 2013 tablet market

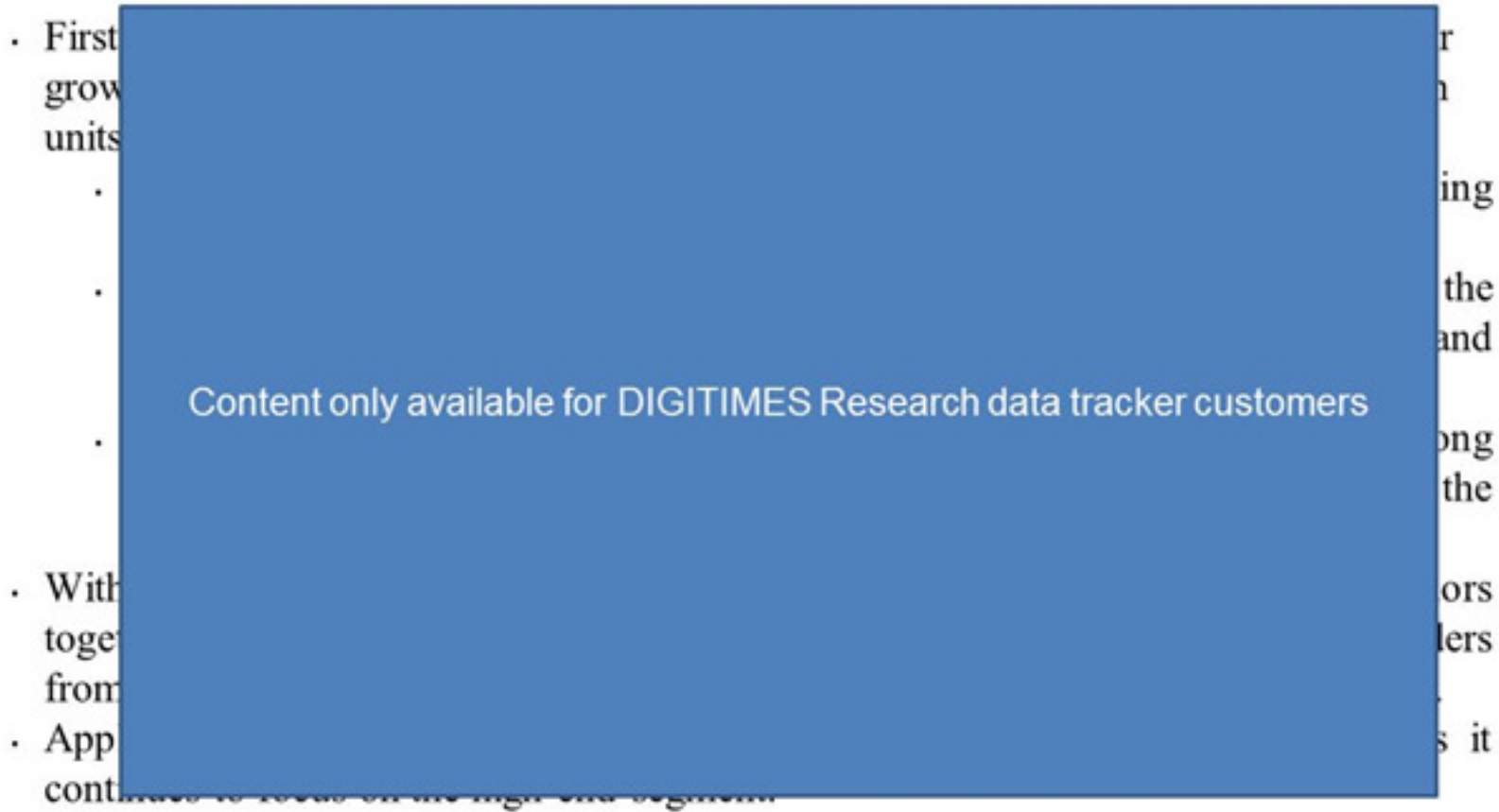
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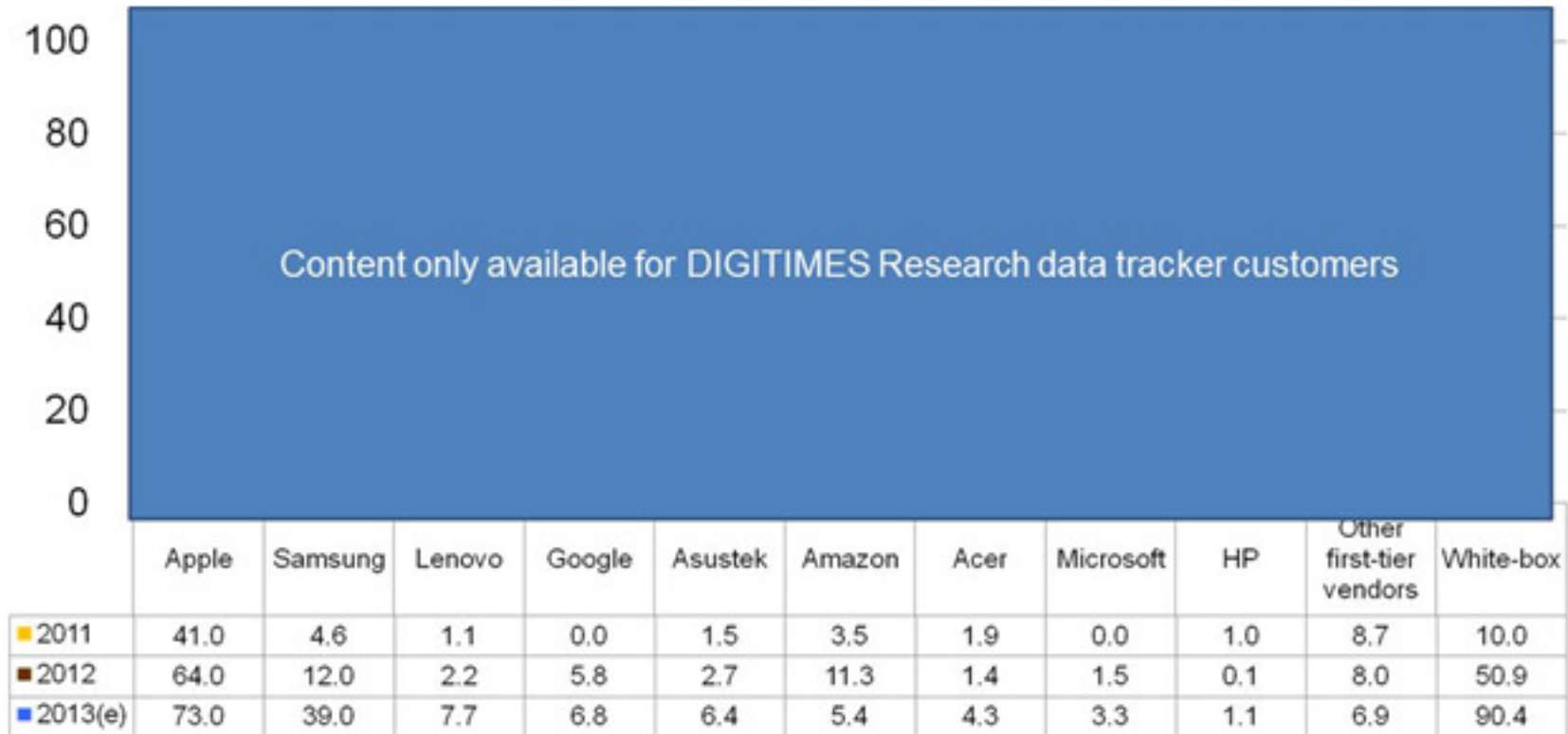


# Shipments by product: iPad, non-iPad branded and white-box, 1Q13-1Q14 (m units)

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# Shipments by vendor, 2011-2013 (m units)

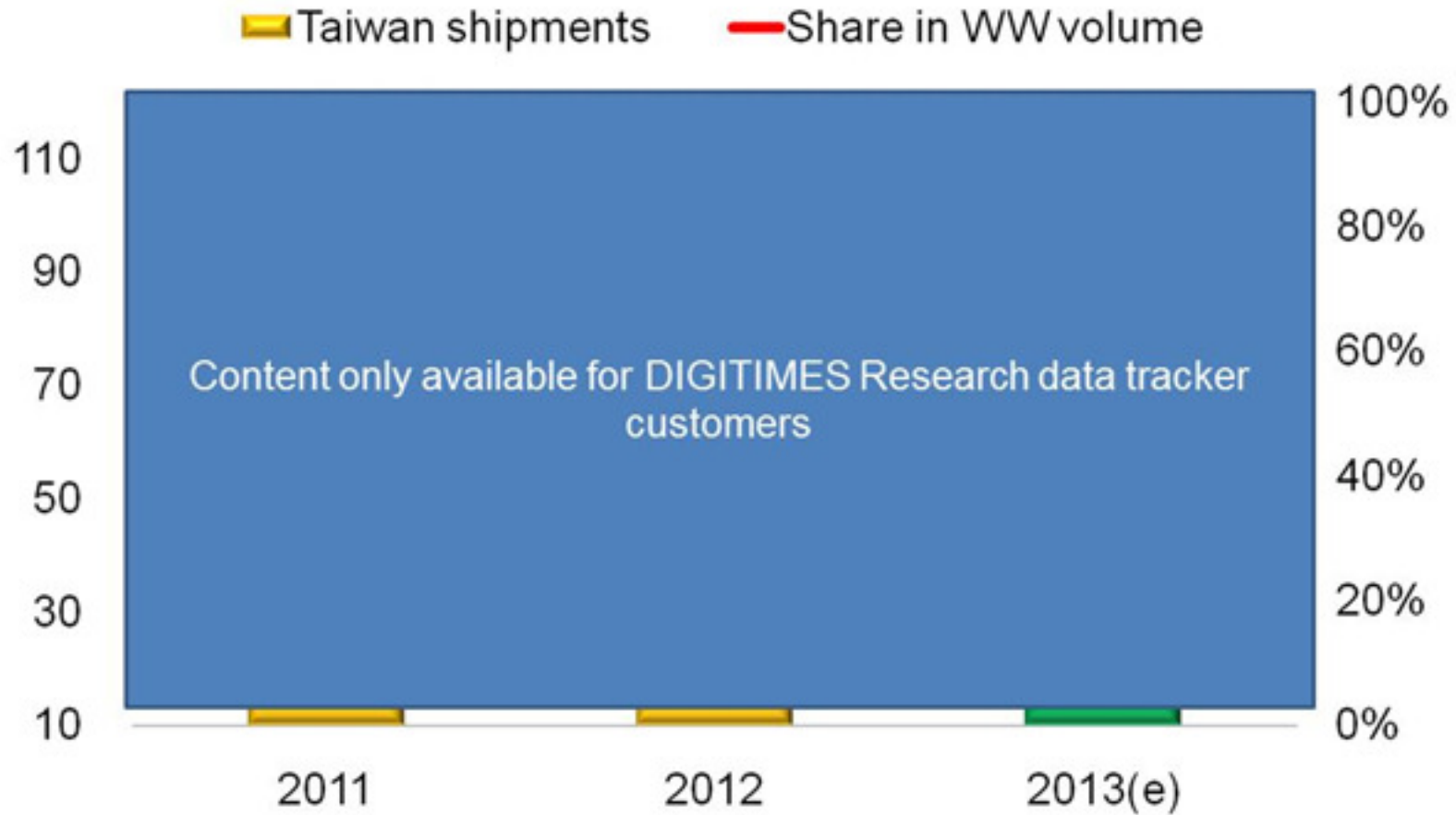


# Shipments by vendor, 2011-2013 (m units)

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# Shipment from Taiwan makers and share of global shipments, 1Q13-1Q14 (m units)

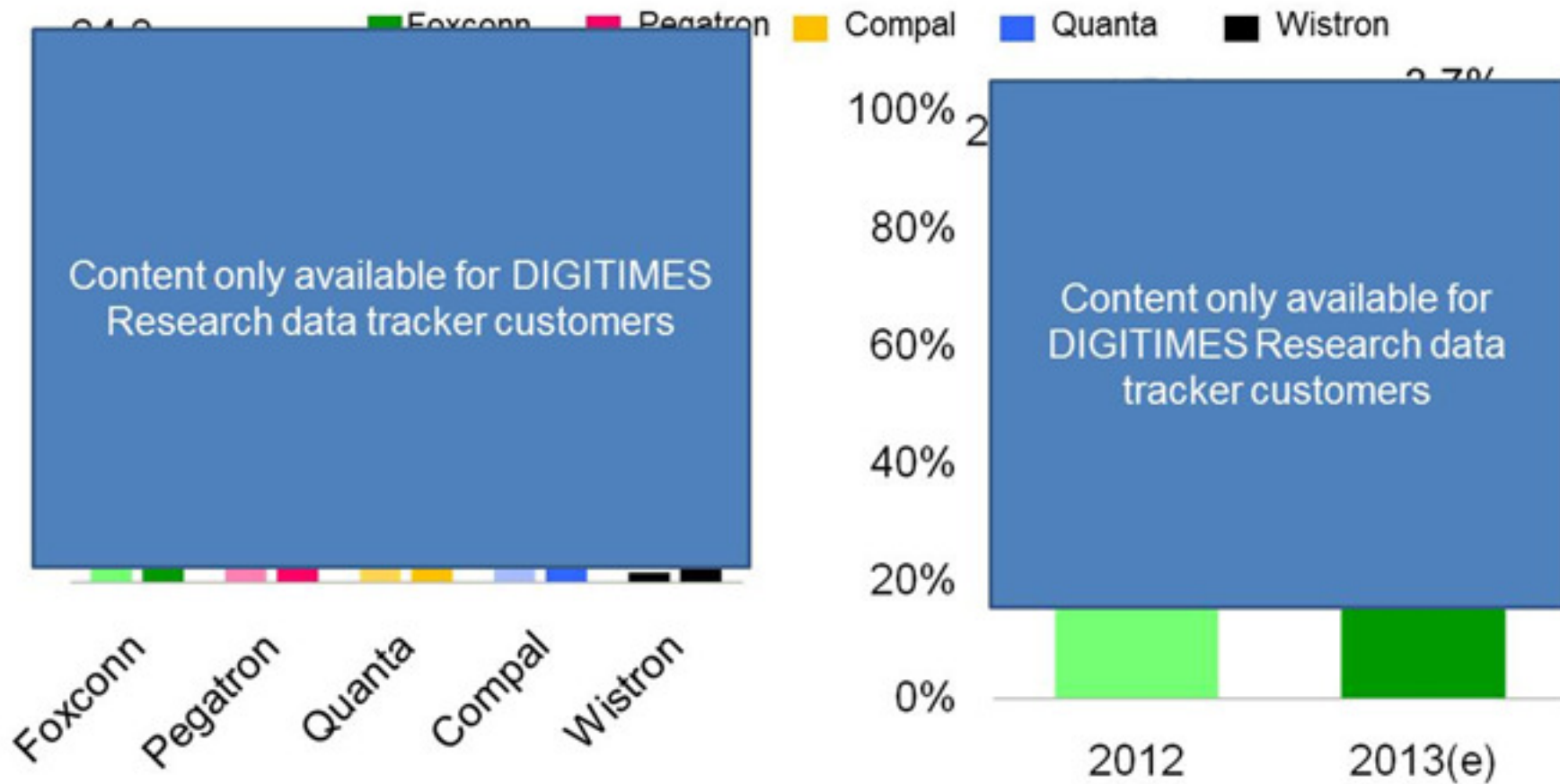


# Shipment from Taiwan makers and share of global shipments, 1Q13-1Q14 (m units)

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# Shipments by Taiwan maker, 2012-2013 (m units)



\*Note: Shipments of the left column are volume for 2012, the right column are 2013

# Shipments by Taiwan maker, 2012-2013 (m units)

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than expected during the fourth quarter.

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