



Strategy Analytics: Apple Shipped 10.1 Million iPads in Q3

Description

The iPad was one area of strength when **Apple** reported [earnings last month](#), with iPad revenue jumping 17% to \$4.7 billion. CEO Tim Cook attributed the growth to “ongoing momentum of our wider lineup,” while CFO Luca Maestri added that the iPad active installed base had hit an all-time high. The Cupertino [tech giant](#) no longer discloses unit sales, so investors have to turn to third-party researchers.

This week, Strategy Analytics released its estimates on the tablet market in the third quarter, and Apple continues to lead the way.

Apple and Amazon lead the way

The market researcher believes that Apple shipped 10.1 million tablets in the third quarter, up 4% compared to a year ago. **Amazon.com** came in No. 2 with 5.3 million shipments, thanks to brisk sales during the e-commerce company’s Prime Day in July that spurred demand with promotions and discounts for a broad swath of Amazon’s devices. Amazon updated the Fire HD 10 tablet in October, which was after the third quarter ended.

Vendor	Q3 2019 Units	Growth (YOY)
Apple (NASDAQ: AAPL)	10.1 million	4%
Amazon (NASDAQ: AMZN)	5.3 million	141%
Samsung	5 million	(5%)

Vendor	Q3 2019 Units	Growth (YOY)
Huawei	3.1 million	(18%)
Lenovo	2.5 million	8%
Others	12.1 million	(27%)
Total	38.2 million	(4%)

Data source: [Strategy Analytics](#). YOY = year over year.

The global tablet market shrank by 4%, according to Strategy Analytics, and many of the top vendors saw unit volumes sink. Apple still dominates the tablet market, recently adding more features to the iPad to improve productivity, including the revamped iPadOS.

“Apple released a slightly larger seventh generation iPad with keyboard support in Q3 2019 for the same price as the previous model, helping drive shipments 4% higher year-on-year,” said Strategy Analytics director of connected computing Eric Smith. “Larger revenue gains for the company hint at a strong mix of iPad Pros compared to the previous year, as Apple wholesale ASPs (average selling prices) rose by 9%.”

Much like other parts of Apple’s business, the company has been leaning heavily on higher prices to drive most of the segment’s growth, as demonstrated by a 17% jump in revenue on a 4% increase in volume.

President Trump’s ongoing trade war with China and the related ban on Huawei has hurt the Chinese telecommunications behemoth, in part because the tensions have severely limited Huawei’s access to Android and online services provided by **Alphabet** subsidiary Google.

“Huawei shipment volumes fell 18% as the US-China trade war restricts its ability to compete outside of the domestic Chinese market,” Strategy Analytics research analyst Chirag Upadhyay noted. “Its key issue is its inability to launch new Android models outside of China as Western consumers rely heavily on Google Mobile Services.”

The estimates differ from figures that IDC put out last week, which suggest that Apple shipped 11.8 million tablets and that the overall market returned to growth of 1.9%.

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1. NASDAQ:AAPL (Apple Inc.)
2. NASDAQ:AMZN (Amazon.com Inc.)

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