

■ Mini-Note Penetration Nears 20% in Q1'09, Dominated by Acer; HP Extends Lead in Notebook PCs Overall

AUSTIN, TEXAS, May 13, 2009—Preliminary data from DisplaySearch reveals that shipments of almost 6 million mini-note PCs (netbooks) raised their penetration in the notebook PC market close to 20% worldwide in Q1'09. Acer was the leader in the mini-note category with a market share of 30.5%, shipping twice as many mini-notes as Asus, their nearest rival. HP continued their dominance of the notebook PC category, growing share to 24.1%, with more than 7.3 million shipped.

Penetration rates for mini-notes were the highest in EMEA and Latin America, and the lowest in China, Japan and North America. Approximately 45% of all mini-notes shipped in the quarter went into EMEA, compared to less than 26% in North America. By contrast, EMEA accounted for 38% of the total notebook market, while North America was less than 30%. The differences in share between EMEA and North America may be a result of telecom subsidy plans in Europe. Telecom providers in Europe began experimenting with free or heavily discounted mini-notes with the purchase of two-year data plans in early 2008, but the first US-based telecom providers tried such subsidies in December 2008, and they have only very recently begun to expand these promotional programs.

For the notebook PC industry as a whole, #2 Acer passed #3 Dell, capturing 18.8% of the market. However, of the top five notebook PC brands, Acer had the greatest percentage of their total shipments accounted for by mini-notes by far (31.6%), compared to HP, Dell, Toshiba and Lenovo, all of whom shipped less than 10% of their volume as mini-notes.

In the forthcoming DisplaySearch [Quarterly Notebook PC Shipment and Forecast Report](#), the company analyzes the importance of mini-notes to brands' total market share, and identifies key geographies that are critical to the long-term growth and health of the mini-note and notebook PC markets.

Table 1: Notebook and Mini-Note Shipments and Growth (millions)

Brand		Q1'08 Shipments	Q4'08 Shipments	Q1'09 Shipments	Q/Q Growth	Y/Y Growth
HP	Mini-Note	0.0	0.9	0.7	-22%	
	Notebook PC*	6.5	7.4	6.6	-11%	2%
	Total	6.5	8.3	7.3	-12%	12%
Acer	Mini-Note	0.0	2.2	1.8	-18%	
	Notebook PC*	4.5	4.3	3.9	-9%	-13%
	Total	4.5	6.5	5.7	-12%	27%
Dell	Mini-Note	0.0	0.4	0.4	0%	
	Notebook PC*	4.7	4.8	3.9	-19%	-17%
	Total	4.7	5.2	4.3	-17%	-9%
Toshiba	Mini-Note	0.0	0.3	0.2	-33%	
	Notebook PC*	2.9	3.0	2.8	-7%	-3%
	Total	2.9	3.3	3.0	-9%	3%
Lenovo	Mini-Note	0.0	0.4	0.2	-50%	
	Notebook PC*	2.3	1.7	1.9	12%	-17%
	Total	2.3	2.1	2.1	0%	-9%
Asus	Mini-Note	0.3	1.7	0.9	-47%	200%
	Notebook PC*	1.0	1.5	0.8	-47%	-20%
	Total	1.3	3.2	1.7	-47%	31%
Others	Mini-Note	0.6	2.1	1.7	-19%	183%
	Notebook PC*	8.3	9.5	4.4	-54%	-47%
	Total	8.9	11.6	6.1	-47%	-31%
Total	Mini-Note	0.9	8.0	5.9	-26%	556%
	Notebook PC*	30.2	32.2	24.4	-24%	-19%
	Total	31.1	40.2	30.3	-25%	-3%

Source: DisplaySearch [Quarterly Notebook PC Shipment and Forecast Report](#)

*In this table, the notebook PC shipments exclude mini-note shipments. The total row for each brand includes both mini-notes and notebook PCs.

"It is clear at the moment that mini-notes play a vital role in the total PC market. Without the additional volume provided by these products, shipment volumes for the notebook PC market

would have been down 19% Y/Y, instead of only falling 3%. While there is no doubt that many buyers of mini-notes would have chosen larger notebook PCs if mini-notes were not available, it is also certain that many buyers might have chosen not to purchase a notebook PC at all," said [John F. Jacobs](#), Director of Notebook Market Research and author of the report.

The DisplaySearch [Quarterly Notebook PC Shipment and Forecast Report](#) is a comprehensive and exclusive compilation of market data from DisplaySearch's industry sources, along with insightful analysis of the state of the notebook PC industry.

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