

Global Handset Shipments, Vendor Market Share, Strategies and Key Trends Q3'2011

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Abstracts

This report and its associated database provide an in-depth assessment of handset shipments, vendor market share, strategies and key trends in Q3'2011, from a global as well a regional perspective. 2010 shipments of handsets globally reached an all time high of 1366.80 million units. Since then, the first three quarters of 2011 have totaled 1111.93 million units with Q3' 2011 alone accounting for 393.96 million units and a rise of 453.34 million units expected for Q4'2011 will see the 2011 full year shipments outstrip those of 2010. Within this overall rise in Q3'2011 handset shipments globally, volumes fell in North America by -6.60% over the same period of 2010, by -10.82% in Western Europe and by -1.49% in Central and Eastern Europe but these declines were more than compensated for by the dramatic rises of in Asia Pacific (+24.91%) as well as in Latin and Central America (23.28%) and in the Middle East and Africa (45.38%) resulting in overall Q3 shipments worldwide that grew in Q3'2011 over the same quarter in 2010. Within the global market, Q3'2011 reflects the continuing changes with vendors in all regions with several making announcements of new products, new operating systems and new functionality in a drive to generate sales ahead of Q4 demand. There are now active battles being fought by all vendors to capture, maintain or win back market share. In terms of the key players and market leaders, Nokia has achieved a global Q3'2011 market share of 27.33% of all shipments but while it remains in poll position its share is being steadily eroded by many aggressive competitors. By contrast, Samsung in second place with a Q3'2011 share of 22.95% is catching up the lead position with a performance that is 25% up on the same time last year and is thus gradually increasing its share and slowly eroding Nokia's lead. LG in global third place with a Q3'2011 share of 5.41% may be somewhat behind the two leaders but has plans to continue to move up the field and contend for the global number 2 place within the near to mid future. ZTE has come from nowhere in 2009 to global fourth position in Q3'2011; a dramatic achievement in a short period of time.

Apple continues to make good inroads globally with its iPhone series and while its Q3'2011 share of 4.38% is down on both previous 2011 quarters, it is up on the same period last year. Another recent entrant, Huawei is also fighting aggressively and has captured a 3.64% share in Q3'2011 share with HTC just behind with 3.38% and RIM's Blackberry series attaining a 3.03% share; all increasing global market share since entry to the handset space. Conversely Motorola Mobility, the veteran of this arena, continues to lose market share and is now in 9th place globally with a low 2.95% Q3'2011 share, just ahead of Alcatel-TCL's 2.67%.

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