

Android powered a third of all mobile phones shipped in Q4 2012

➤ Chinese vendors Huawei, ZTE and Lenovo move in to the top five smart phone vendors

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Canalys has published its final mobile phone shipment estimates across the 50+ countries that it tracks. The total mobile phone market, at 438.1 million units, was flat year-on-year, while the worldwide smart phone market grew 37%. Android smart phones accounted for 34% of all phone shipments and iOS phones 11%. Smart phones now represent almost 50% of all the phones that shipped in Q4 2012.

In the smart phone market, Android handsets accounted for 69% of the 216.5 million shipped. Samsung had a very strong quarter, growing 78%, while the Chinese vendors Huawei, ZTE, Lenovo and Yulong all grew by triple-digit percentages. Android's share did, however, dip sequentially from 74% as Apple's share grew from 15% to 22% on the strength of the iPhone 5. BlackBerry and Windows Phone shares remained unchanged sequentially at 4% and 2% respectively.

'BlackBerry, Microsoft and Nokia, as well as other Android vendors, have strategies and devices in place to attack, but the task is daunting to say the least,' said Pete Cunningham, Principal Analyst. 'When we look at the whole of 2012, Nokia remained the number three smart phone vendor, shipping 35 million units, but Apple in second place shipped 101 million more handsets. First-placed Samsung shipped 74 million more than Apple - the gaps are colossal. But there is still a big opportunity as smart phone penetration increases around the world. Vendors left in the wake of the top vendors must at the very least improve their portfolios, time-to-market and marketing, as well as communicate their differentiators. Microsoft, BlackBerry and other new OS entrants, such as Mozilla, must make the OS switch as simple as possible and drive and localize their respective app and content ecosystems.'

Huawei took third place for the first time in Q4 and ZTE fourth. As well as their home markets, they have been relatively successful in the US, where ZTE was fourth and Huawei fifth, driven by their portfolios of low-cost LTE smart phones. Even so, both vendors took less than 5% share each there.

Sony fell out of the top five this quarter, and Lenovo moved in. It was one of the fastest-growing smart phone vendors, growing 216% year-on-year and shifting 9.5 million units to take fifth place. 'China made up 98% of Lenovo's shipments with a handful of emerging markets making up the rest. Its struggle to gain a foothold in markets outside of China means that it may be forced down the acquisition route - as it was with its PC business - hence the speculation about BlackBerry,' said Jessica Kwee, Analyst.

In the largest phone market in the world, China, smart phones dominated shipments, making up 73% of the market compared to 40% a year ago. Volumes of smart phones in China grew 113% to 64.7 million units, with Samsung taking the top spot followed by Lenovo and Yulong. Huawei leapfrogged ZTE by over a million units to take fourth place. 'China is a massive growth prospect, but Apple is not making the market share impact there that it is in other markets. The lack of a device on the China Mobile network is a big

drawback, combined with high price points. Addressing these issues with the combination of a TD-SCDMA device and a cheaper model would open the flood-gates,' said Nicole Peng, China Research Director.

Worldwide smart phone market Market shares Q4 2012, Q4 2011		
Vendor	Q4 2012 shipments (millions)	% share
Total	216.5	100.0%
Samsung	62.9	29.0%
Apple	47.8	22.1%
Huawei	11.5	5.3%
ZTE	10.1	4.7%
Lenovo	9.5	4.4%
Others	74.7	34.5%

Source: Canalys estimates, © Canalys 2013
Note: Where applicable, a vendor's shipment numbers exclude rebranded products for which they act as an ODM.

Worldwide smart phone market Market shares Q4 2012, Q4 2011		
OS vendor	Q4 2012 shipments (millions)	% share
Total	216.5	100.0%
OHA	149.8	69.2%
Apple	47.8	22.1%
BlackBerry	7.6	3.5%
Microsoft	5.1	2.4%
Nokia	3.2	1.5%
Others	3.0	1.4%

Source: Canalys estimates, © Canalys 2013
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