

Canalys 权威发布: 2016 年中国智能机市场重回双位数增长, 增幅为全球十大市场之首

Palo Alto, Shanghai, Singapore and Reading (UK) - Wednesday, 8 February 2017

全球知名 IT 咨询公司 Canalys 日前发布其追踪的全球 63 个国家的智能手机市场数据。中国市场首次单季度出货量超过一亿三千万台, 占全球市场总量的 32.4%, 是全球第二大市场美国的 2.4 倍, 第三大市场印度的 4.7 倍。全年中国市场出货量达 4.7 亿台, 年增长达 11%, 一扫 2015 年的年增长 1.9% 的市场颓势, 重回双位数增长率。

2016 年智能机市场复苏的推动力来自于多方面因素, 其主要推动力来自于国产品牌, 尤其是领先厂商华为, OPPO, Vivo 在大幅推动品牌推广, 产品更新和渠道建设的举措。华为以全年 7617 万的出货量的微弱优势领先于第二名 OPPO (7321 万) 和第三名 Vivo (6324 万)。Canalys 研究分析师丁洁总结到: “2016 年三家厂商无论在新产品, 市场操盘和品牌建设等各个方面都势均力敌, 三家的旗舰明星产品对其总体销量贡献和品牌助动力越趋明显。在三星, 苹果和小米等品牌调整市场战略之际, 华为在一二线城市的地位大大巩固, 同时通过“千县计划”下沉到 OPPO 和 Vivo 的主战场。而 OPPO 和 Vivo 则通过其大量的品牌广告投入, 逐渐向一二线城市消费者渗透。2017 年这三家厂商之间的竞争将会更趋白热化, 同时其已形成的规模效应对运营商和公开渠道的影响也会使中小品牌生存空间减少。但是在此竞争格局下, 其中一家要达到 20% 的市场份额并且持续保持领先地位将会变得相当困难。”

2016 年中国市场第四名小米和第五名的苹果的出货量成绩则相当令人失望。小米智能手机年总出货量为 5124 万台, 相对 2015 年大幅减少 21%, 市场份额也从 2015 年的 15.2% 降到 10.8%, 达到 2013 年以来的最低点。苹果全年出货 4377 万台, 环比减少 18.2%。丁洁提出: “中国和香港市场仍然是苹果的全球十大市场里面的重灾区, 直接导致其全球全年出货量相对 2015 年倒退 6.9%。2017 年其前景仍然不乐观, 苹果要使其在中国市场的表现回复到 2015 年的鼎盛时期将困难重重。正如其他发达国家市场消费者一样, 中国消费者对于 iPhone 10 周年的产品更新期望很高, 如新 iPhone 无法达到消费者预期, 尤其在新技术采用和外观设计上, 苹果在中国的高端市场将会受到更严重的打击。而其他包括三星在内的厂商将会藉此市场机会向高端用户进一步渗透。”

Worldwide smartphone market					
Market shares 2016, 2015					
Country	2016 shipments (million)	% share	2015 shipments (million)	% share	Growth 2016/2015
Total	1,412.8	100.0%	1,367.4	100.0%	3.3%
People's Republic of China (mainland)	476.5	33.7%	427.6	31.3%	11.4%
United States	166.2	11.8%	162.5	11.9%	2.3%
India	113.2	8.0%	102.1	7.5%	10.9%
Japan	33.1	2.3%	32.5	2.4%	1.8%
Indonesia	32.4	2.3%	33.6	2.5%	-3.7%

Source: Canalys estimates, © Canalys 2017
Note: Where applicable, a vendor's shipment numbers exclude rebranded products for which they act as an ODM.
See definitions sheet for more detail

People's Republic of China (mainland) smartphone market					
Market shares 2016, 2015					
Vendor	2016 shipments (million)	% share	2015 shipments (million)	% share	Growth 2016/2015
Total	476.5	100.0%	427.6	100.0%	11.4%
Huawei	76.2	16.0%	63.0	14.7%	20.9%
Oppo	73.2	15.4%	35.6	8.3%	105.6%
Vivo	63.2	13.3%	38.6	9.0%	63.8%
Xiaomi	51.2	10.8%	64.9	15.2%	-21.0%
Apple	43.8	9.2%	53.5	12.5%	-18.2%

Source: Canalys estimates, © Canalys 2017
Note: Where applicable, a vendor's shipment numbers exclude rebranded products for which they act as an ODM.
See definitions sheet for more detail

If you are interested in further information, please contact us:

- Canalys Americas: +1 650 681 4488
Chris Jones: chris_jones@canalys.com +1 650 681 4489
- Canalys APAC: +65 6671 9399 (Singapore) / +86 21 2225 2888 (China)
Jessie Ding: jason_low@canalys.com +86 159 2128 2971 (China)
Mo Jia: mo_jia@canalys.com +86 158 0076 4291 (China)
- Canalys EMEA: +44 118 984 0520
Tim Coulling: tim_coulling@canalys.com +44 118 984 0533

About Canalys

Canalys is an independent analyst company that strives to guide clients on the future of the technology industry and to think beyond the business models of the past. We deliver smart market insights to IT, channel and service provider professionals around the world. Our customer-driven analysis and consulting services empower businesses to make informed decisions and generate sales. We stake our reputation on the quality of our data, our innovative use of technology and our high level of customer service.

To view the chart(s) from this media alert, and others from Canalys, download the new Insight @Canalys app today from the Apple App Store, the Google Play store or as an [HTML 5 web app](#).

Receiving updates

To receive media alerts directly, or for more information about our events, services or custom research and consulting capabilities, please complete the [contact form](#) on our web site.

Alternatively, you can e-mail press@canalys.com or call +1 650 681 4488 (Palo Alto, California, USA), +65 6671 9399 (Singapore), +86 21 2225 2888 (Shanghai, China) or +44 118 984 0520 (Reading, UK).

Copyright © Canalys 2017. All rights reserved.

Americas: Suite 317, 855 El Camino Real, Palo Alto, CA 94301, US | tel: +1 650 681 4488
APAC: Room 310, Block A, No 98 Yanping Road, Jingan District, Shanghai 200042, China | tel: +86 21 2225 2888
APAC: 133 Cecil Street, Keck Seng Tower, #13-02/02A, Singapore 069535 | tel: +65 6671 9399
EMEA: Diddenham Court, Lambwood Hill, Grazeley, Reading RG7 1JQ, UK | tel: +44 118 984 0520
e-mail: inquiry@canalys.com | web: www.canalys.com