

IDC: EMEA Smartphone Market "Stable" in Q1

Written by Marco Attard
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EMEA smartphone shipments total 83.7 million units in Q1 2019, IDC reports-- a -3.3% Y-o-Y drop, confirming recent trends of a slowing market. Revenues face a steeper decline of -10% Y-o-Y, reaching \$26780 million.

Feature phone sales total 45.9m, with over 66% being shipments to Africa.

Company	2018Q1 Unit Shipments	2018Q1 Market Share	2019Q1 Unit Shipments	2019Q1 Market Share	2019Q1 Unit YoY Growth
Samsung	16.9	30.76%	15.7	29.47%	-6.82%
Huawei	8.1	14.86%	13.5	25.39%	66.13%
Apple	10.2	18.55%	7.8	14.74%	-22.73%
Xiaomi	2.2	4.05%	2.9	5.55%	33.26%
HMD	3.3	6.08%	2.2	4.21%	-32.64%
Others	14.1	25.69%	11.0	20.64%	-21.86%
TOTAL	55.0	100%	53.5	100%	-2.74%

Source: IDC Quarterly Mobile Phone Tracker, May 2019

The M. East sees the biggest contraction in smartphone volumes at -18.8% Y-o-Y, together with a drop of around -30% Y-o-Y in value, as recent buoyancy in oil prices has failed to bring more consumer confidence and expenditure. The African market is the fastest growing at 6% Y-o-Y, while European volumes see "little change."

ASPs are down across W. Europe, while the M. East faces a sharp drop. Only CEE has ASPs sustained Y-o-Y, although such average prices remain little more than 50% of W. European prices.

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Moving the vendors, Huawei and Xiaomi continue to make incremental advances, while Apple has a tough Q1 2019 with 23% market share across Europe, the lowest result in 5 years. The top 3 Chinese brands, including the Transsion stable in Africa, make 36.8% of the market, up from 32.8% in Q1 2018, confirming the trend toward consolidation. Meanwhile Samsung shows resilience with 29.5% share, an increase of 4 percentage points over Q4 2018.

"Europe has been a global focus of vendor concentration in recent quarters, with some of the smaller players under a lot of pressure. Looking ahead, it is no longer possible to see clear trends as before," IDC says. "The blacklisting of Huawei in the US on 16 May is creating so many unknowns, and uncertainty is the new key word in the industry as global geopolitics--unconnected directly with Europe or EMEA-- becomes the single most important factor in how the market will develop over the rest of the year."

April saw the launch of the first 5G network in Europe, specifically in Switzerland, soon followed by networks from EE in the UK and the pan-European Vodafone group. The analyst says it will take some time before 5G devices become an important part of the European smartphone market, as European 5G adoption will be slower compared to 4G. Though premium 5G devices will be available across the region by end-2019, the widespread availability of 4G service will make it hard for operators to convince customers to make an early upgrade.

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