

## Gartner: Nokia Leads Q3 Mobile Market

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18. November 2011

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Global Q3 2011 mobile device sales total 440.5M units according to Gartner, growing by 5.6% Y-o-Y-- despite the W. European market showing weak performance (as expected due to the current economic situation).

Making up for the European weakness are MEA territories, where emerging markets demand low-cost and dual-SIM handsets.

Gartner says Q3 2011 sales into the channel total 460M units, due to device shipments late in the quarter (in preparation for the holiday season) causing inventory build-up in the channel-- build-up Gartner expects will be clear by Q1 2012.

### Worldwide Mobile Device Sales to End Users by Vendor in 3Q11 (Thousands of Units)

| Vendor             | 3Q11<br>Units    | 3Q11 Market Share (%) | 3Q10<br>Units    | 3Q10 Market Share (%) |
|--------------------|------------------|-----------------------|------------------|-----------------------|
| Nokia              | 105,353.5        | 23.9                  | 117,461.0        | 28.2                  |
| Samsung            | 78,612.2         | 17.8                  | 71,671.8         | 17.2                  |
| LG Electronics     | 21,014.6         | 4.8                   | 27,478.7         | 6.6                   |
| Apple              | 17,295.3         | 3.9                   | 13,484.4         | 3.2                   |
| ZTE                | 14,107.8         | 3.2                   | 7,817.2          | 1.9                   |
| Research In Motion | 12,701.1         | 2.9                   | 12,508.3         | 3.0                   |
| HTC                | 12,099.9         | 2.7                   | 6,494.3          | 1.6                   |
| Motorola           | 11,182.7         | 2.5                   | 8,961.4          | 2.1                   |
| Huawei Device      | 10,668.2         | 2.4                   | 5,478.1          | 1.3                   |
| Sony Ericsson      | 8,475.9          | 1.9                   | 10,346.5         | 2.5                   |
| Others             | 148,990.9        | 33.8                  | 135,384.1        | 32.5                  |
| <b>Total</b>       | <b>440,502.2</b> | <b>100</b>            | <b>417,085.7</b> | <b>100</b>            |

Source: Gartner (November 2011)

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Smartphone demand is also stalling in W. Europe, as consumers hold off upgrades in order to either wait for holiday season promotions on high-end models or new iPhone models (and the price cuts older iPhone models receive afterwards).

Global Q3 2011 smartphone sales total 115M units, with 42% Y-o-Y growth-- and a -7% Q-o-Q decline. Smartphones account for 26% of all Q3 mobile device sales, a negligible increase from 25% in Q2 2011.

Nokia remains the WW mobile device leader, with 23.9% of global sales (down from 28.2% in Q3 2010). The company shows good performance in emerging markets (thanks to dual-SIM feature phones) and should improve further in Q4 through the push on the new Lumia devices, even if Gartner predicts Nokia won't see a true turnaround until H2 2012.

Samsung leads in WW smartphone sales, with smartphone sales to end users reaching 24M units in Q3 2011-- ahead of Nokia in W. Europe.

Apple iPhone sales are down by nearly 3M units from Q2 2011, reaching 17M (a 21% Y-o-Y increase) due to the iPhone 4S announcement.

When it comes to operating systems, Android leads with 52.5% of Q3 2011 smartphone sales (totalling 60M units), benefiting from "more mass-market offerings, a weaker competitive environment and the lack of exciting new products on alternative operating systems" according to Gartner.

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