

Google's Android becomes the world's leading smart phone platform

- Canalys reveals smart phone market exceeded 100 million units in Q4 2010

Palo Alto, Singapore and Reading (UK) - Monday, 31 January 2011

For immediate release

Canalys today published its final Q4 2010 global country-level smart phone market data, which revealed that Google's Android has become the leading platform. Shipments of Android-based smart phones reached 32.9 million, while devices running Nokia's Symbian platform trailed slightly at 31.0 million worldwide. But Nokia did retain its position as the leading global smart phone vendor, with a share of 28%. The fourth quarter also saw the worldwide smart phone market continue to soar, with shipments of 101.2 million units representing year-on-year growth of 89%. The final quarter took shipments for the year to fractionally below 300 million units, with an annual growth rate of 80% over 2009 (see table below).

In Q4 2010, volumes of Google OS-based smart phones (Android, OMS and Tapas) were again boosted by strong performances from a number of vendors, notably LG, Samsung, Acer and HTC, whose volumes across these platforms grew 4,127%, 1,474%, 709% and 371% respectively year-on-year. HTC and Samsung together accounted for nearly 45% of Google OS-based handset shipments.

'2010 has been a fantastic year for the smart phone market. After a difficult 2009, the speed with which the market has recovered has required real commitment and innovation from vendors and they have risen to the challenge,' said Canalys VP and Principal Analyst Chris Jones. 'But vendors cannot afford to be complacent. 2011 is set to be a highly competitive year with vendors looking to use new technology, such as dual-core processors, NFC and 3D displays, to differentiate their products and maintain value.'

At a regional level, Europe, the Middle East and Africa (EMEA) remained the largest market, with shipments totalling 38.8 million and a year-on-year growth rate of 90%. Nokia continued to lead in EMEA and Asia Pacific, but in 2010 it was overtaken by RIM in Latin America, which shipped over a million more units than Nokia in Q4 2010. The vendor was particularly helped by the popularity of its mid-range smart phones, such as its Curve family of devices.

The United States continued its reign as the largest country market in terms of shipments, at more than double the size of the Chinese smart phone market. RIM recaptured first place from Apple, as the latter experienced its usual US seasonal dip, and RIM benefited from the first full quarter of shipments for the BlackBerry Torch. HTC successfully maintained its third-place ranking in the US for the third consecutive quarter, driven by its speed to market with the latest Android updates and new Windows Phone 7 devices.

‘The US landscape will shift dramatically this coming year, as a result of the Verizon-Apple agreement,’ said Canalys Analyst Tim Shepherd. ‘Verizon will move its focus away from the Droid range, but the overall market impact will mean less carrier-exclusive deals, while increasing the AT&T opportunity for Android vendors, such as HTC, Motorola and Samsung.’ Android was by far the largest smart phone platform in the US market in Q4 2010, with shipments of 12.1 million units - nearly three times those of RIM’s BlackBerry devices. Windows Phone 7 devices appeared too late in the quarter to take full advantage of holiday season purchasing. As a result, Microsoft lost share in the United States, from 8% in Q4 2009 to 5% in Q4 2010.

Analysis of the published country-level data shows that, around the world, the strength of smart phone performances remained diverse. In South Korea, for example, shipments grew from under 700,000 units in Q4 2009 to just under 3.4 million units in Q4 2010, making the country a top 10 market. In Japan, Android shipments have taken off over the past year, with nearly 1.4 million units shipping from local as well as international vendors, such as HTC. More Japanese vendors have also announced plans to launch Android devices in 2011, such as NEC Casio and Panasonic. Under pressure from Huawei and Samsung in particular, Nokia’s share in China slipped to 56%, down from 76% a year ago, despite growing its volume in the country by over 70% in the same period. Albeit from a smaller base, the Chinese market grew 134% year-on-year, notably faster than the US market, which grew at 64% in the quarter.

Canalys analysts in Asia Pacific, the Americas and EMEA are available for press interviews on topics related to mobile devices and the growing ecosystem for mobile applications and services. There will also be a significant Canalys analyst presence at Mobile World Congress in Barcelona from 14 to 17 February. To arrange an interview, please send a request to press@canalys.com. Photos and bios of analysts are available from the Canalys web site.

Canalys Smart Phone Analysis, Quarterly Shipment Data

Worldwide smart phone market					
Market shares Q4 2010, Q4 2009					
OS vendor	Q4 2010 shipments (millions)	% share	Q4 2009 shipments (millions)	% share	Growth Q4'10/Q4'09
Total	101.2	100.0%	53.7	100.0%	88.6%
Google	33.3	32.9%	4.7	8.7%	615.1%
Nokia	31.0	30.6%	23.9	44.4%	30.0%
Apple	16.2	16.0%	8.7	16.3%	85.9%
RIM	14.6	14.4%	10.7	20.0%	36.0%
Microsoft	3.1	3.1%	3.9	7.2%	-20.3%
Others	3.0	2.9%	1.8	3.4%	64.8%

Source: Canalys estimates, © Canalys 2011

About the Canalys Smart Phone Analysis services

The shipment estimates discussed in this release come from the market-leading Canalys Smart Phone Analysis services. Canalys offers services looking at the markets by country in Asia Pacific, North and Latin America, and EMEA, as well as providing worldwide market overviews and analysis of consumer and enterprise end-user attitudes and preferences toward mobile applications, devices and services.

About Canalys

Canalys specializes in delivering high-quality market data, analysis and advice to the world's leading technology vendors. It is recognized as a key provider of continuous advisory services and confidential custom projects for marketing managers and strategists within blue-chip IT, telecoms, navigation, and consumer electronics companies. It has unrivalled expertise in routes to market for all kinds of high-technology products and services and provides worldwide market data and trends analysis. Canalys does not release preliminary, incomplete data and uses consistent definitions and methodologies to ensure total consistency across all of the market data that appears in its services. The company publishes its final market data every quarter for every country tracked simultaneously on the same day.

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