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Western European Mobile Phone Market Grows in 2Q13, but Declines Sequentially Due to Announcement of New Devices; LTE Represents 32% of Total Market, Says IDC

10 Sep 2013

LONDON, September 10, 2013 – The Western European mobile phone market grew in the second quarter of 2013, but declined from the first quarter this year, according to International Data Corporation ([IDC](#)). Total shipments increased 2.6% year on year to 43.3 million units, according to IDC's [Europe, Middle East and Africa Quarterly Mobile Phone Tracker](#), published in August 2013.

The feature phone segment continued to shrink as shipments fell 27% year on year to 10.7 million units. The smartphone segment increased 19% year on year to 32.6 million units in the quarter to represent 75% of total shipments in the region.

In the past two years, the second quarter was the weakest in the region as mobile operators are more cautious listing new handsets for the Christmas campaigns, particularly from vendors with small marketing budgets to promote their products. On the other hand the second quarter is one of the most important quarters for new product announcements as the summer season approaches. Aware of the new devices coming out, consumers prefer to hold their purchases for the latest flagship devices or for the price reduction the current devices will have after the new devices arrive.

"The Western European market continues to suffer from a tough economic environment, although this does not prevent mobile operators from pushing those handsets that will potentially drive higher revenues in the future," said [Francisco Jeronimo](#), Research Director, European Consumer Wireless and Mobile Communications. "One important fact worth noting this quarter was that LTE already represented 32% of total mobile phone shipments and 43% of total smartphone shipments. Although most consumers do not subscribe yet to an LTE data plan when renewing their smartphones, it is important for mobile operators to enable their users with LTE handsets while the expansion of their LTE networks continues. When the networks are widely available geographically it will be faster to migrate users to an LTE data plan as they become cheaper."

Android continues to be the leading operating system. In the quarter, shipments went up 29% year on year to 23.2 million units, which gave Android OS 71% market share, the highest ever in the region. The Ice Cream Sandwich version was the most popular, representing 70% of total Android shipments. Apple's iOS lost market share due to the expectation of a new iPhone coming out in the third quarter and it now represents 17.4% of total shipments, which is lower than the 19.4% in the second quarter last year. Windows Phones continued to see steady but slow growth. Shipments increased by 48% year on year to 2 million units, or 6.3% of total smartphone shipments.

Top Western European Mobile Phone Vendors, Total Shipments and Market Share, 2Q13 Smartphones and Feature Phones (Units in Millions)

Vendor	2Q13 Unit Shipments	2Q13 Market Share	2Q12 Unit Shipments	2Q12 Market Share	2Q13/2Q12 Change
1. Samsung	18.8	43.4%	17.3	41%	8.7%
2. Nokia	5.7	13.2%	8.1	19.2%	-29.6%
3. Apple	5.7	13.2%	5.2	12.3%	9.6%
4. Sony	3.7	8.5%	2.3	5.5%	60.9%
5. LG	2.7	6.2%	0.9	2.1%	200%
6. Others	6.7	15.5%	8.4	19.9%	-20.2%
Total	43.3	100%	42.2	100%	2.6%

Source: IDC European Quarterly Mobile Phone Tracker, August 2013

Top Western European Mobile Phone Vendors, Shipments and Market Share, 2Q13 Smartphones (Units in Millions)

Vendor	2Q13 Unit Shipments	2Q13 Market Share	2Q12 Unit Shipments	2Q12 Market Share	2Q13/2Q12 Change
1. Samsung	14.0	42.9%	12.0	43.8%	16.7%
2. Apple	5.7	17.5%	5.2	19%	9.6%

3. Sony	3.7	11.3%	2.0	7.3%	85%
4. LG	2.6	8%	0.6	2.2%	333.3%
5. Nokia	1.8	5.5%	2.0	7.3%	-10%
6. Others	4.8	14.7%	5.6	20.4%	-14.3%
Total	32.6	100%	27.4	100%	19%

Source: IDC European Quarterly Mobile Phone Tracker, August 2013

For more information on IDC's European Quarterly Mobile Phone Tracker service and its related deliverables, please contact Francisco Jeronimo, research director, IDC Western European mobile communications group (fjeronimo@idc.com, tel.: +44(0)20 8987 7186), or visit www.idc.com.

About IDC

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