

India's Wearables Market Ships Record 14.9 Million units in 2019; Growth led by Ear-worn Devices, Says IDC India

NEW DELHI, 27th February 2020 – The India wearables market completed another record year as the shipments of wearables devices saw an impressive 168.3% year-over-year (YoY) growth in 2019, closing the year with 14.9 million units, according to the recent data from the [International Data Corporation's \(IDC\) Worldwide Quarterly Wearable Device Tracker](#), 4Q19.

Basic wearables continue to dominate India's wearables market with a 96.2% category share, up 177% YoY in 2019. Smart wearables that can run third-party applications on the device itself, accounted for 3.8% of the overall wearable shipments in 2019 and registered 49.5% growth from the previous year. Accounting for most shipment volumes, the earwear category grew five-fold shipping 8.5 million units, watches grew 77.5% while wrist bands ended the year as the second-largest wearable category.

In the last quarter of the year (4Q19), wearables vendors shipped a total of 5.1 million units, making it the seventh consecutive quarter of double-digit growth in shipments. It was also the biggest quarter for wrist bands; with 1.5 million unit shipments in a single quarter, witnessing 30.9% YoY growth.

Commenting on the growth of wearables, [Anisha Dumbre](#), Market Analyst, IDC India stated, "Ear-worn devices have found huge appeal with consumers, who are spoiled for choice with a variety of models at different price points. Affordable neckbands are leading the charge of migration from wired to wireless in this category. At the same time, truly wireless devices with improved battery life and connectivity are attracting users to spend more. As more vendors entered this segment with affordable options, the average selling price

(ASP) of the category came down to \$39 in 2019 from \$63 a year ago, resulting in massive growth in this category.”

Product Category Highlights

Wrist bands continued to grow in higher double-digit as the year ended with 5.3 million units, up 52.6% from the previous year. Xiaomi remained the dominant leader with a 48.9% category share and grew 54.7% YoY in 2019. Titan also maintained its second position with a 14.5% category share as its shipments grew 24.1% during the year. The category remains consolidated to the top five vendors, contributing 86.6% share to the category in 2019.

A total of 933 thousand units of watches were shipped during the year with a 77.5% YoY growth. Smartwatches continue to lead the watch category with 61.1% share in 2019 and grew 53.6% from the previous year. In the smart watch category, Fossil was the leading vendor with 30.3% share, followed by Apple with a 26.6% share in 2019. However, Huami with its Amazfit brand, was the leading player in the basic watch category. Also, Huami's aggressive pricing and well-diversified portfolio helped the brand to become the 2nd largest brand in the overall watch category.

Earwear grew multifold with 443.6% during 2019, making it one of the fastest-growing consumer electronics categories in the country. India based vendor BoAt Lifestyle was the leading brand with a 27.3% market share in this category in 2019. Multiple distribution partnerships with the leading e-commerce and retail channels, affordable pricing, and significant investment in marketing, helped BoAt Lifestyle to gain share in this category. However, in the truly wireless segment, Apple continues to lead the segment with its AirPods range, garnering 43.1% market share in 2019.

Figure 1



India Wearables market, Product Categories, Market Share, Year-over-Year Growth 2019

Product Category	2019 Shipments	2019 Market Share	2018 Shipments	2018 Market Share	Year-over-Year unit change (2019 vs 2018)
1. Earwear	8.5	57.0%	1.6	28.1%	443.6%
2. Wrist Band	5.3	35.3%	3.4	62.0%	52.6%
3. Watch	0.9	6.3%	0.5	9.5%	77.5%
Others	0.2	1.4%	0.02	0.4%	884.2%
Total	14.9	100.0%	5.6	100.0%	168.3%

Source: IDC Worldwide Quarterly Wearable Device Tracker, 4Q19

Note: Shipments are in millions

“The wearables market is in a state of flux with new form factors and brands entering every few months. Vendors are recognizing the growth potential of the wearable devices and unlocking new use cases for a holistic wearable experience,” said [Jaipal Singh](#), Associate Research Manager, Client Devices, IDC India. Commenting on the potential

of segments, Singh summarised, “India is still underpenetrated when it comes to the adoption of wearables for health. Growing concerns around lifestyle diseases, have certainly helped wearables to get initial traction for weight control and physical activity monitoring. However, the market is yet to scale beyond the key cities. Vendors will need to continue to experiment in this segment to explore scalable opportunities.”

Note:

For an ear-worn device to be considered a wearable by IDC's definition, it must offer functionality beyond audio, like a smart assistant, health and fitness tracking, audio experience enhancement or language translation.

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