



## **European Wearables Market Hits Record Values in 2018, With Over 28 Million Units Shipped, says IDC**

Shipments of wearable devices in Europe grew 30% year over year to 28.3 million units in 2018, according to data from International Data Corporation's ([IDC Worldwide Quarterly Wearable Device Tracker](#)). From a quarterly perspective, in 4Q18 the market grew 43.3% from 4Q17 and 71% from 3Q18, reaching a total of 11.7 million units. In 2018, Watches accounted for 52.1% of shipments in the region, followed by wrist bands (25.9%) and earwear (21.2%).

"In 2018, the wearables market was impacted by three main events: new challengers, product strategy shifts and stronger portfolios," said Francisco Almeida, senior research analyst for wearable devices at IDC. "Xiaomi and Huawei have doubled down their presence in the European space, Fitbit and Garmin continue to shift their portfolio from basic wearables to higher levels of functionality in the smart wearable category, and the value propositions from the players in the market are better overall."

"Many brands recorded a successful year 2018 in Central and Eastern Europe," said Jiří Teršel, senior research analyst, IDC CEE Systems & Infrastructure Solutions. "On top of that, Xiaomi stood out remarkably well in terms of units shipped with its sub \$30 price tag basic wristbands. This extremely competitive price tag has allowed many price-sensitive consumers to safely test and learn the proposition of wristbands."

**Smart wearables** accounted for 41.2% of all shipments in 2018, but that figure varies if we split the region between Western Europe and Central and Eastern Europe. In Western Europe, smart wearables took 45.6% of the overall market, while in CEE that number was around 22%. In 2018, the European smart wearables market was led by Apple (46.9%), followed by Samsung (19.2%), Garmin (12.6%), Fitbit (10.7%), and the Fossil Group (8.2%).

**Basic wearables** took the remaining 58.8% of the market (54.4% in Western Europe and 78.3% in Central and Eastern Europe). In 2018, Apple's AirPods combined with the Beats brand had the lion's share of the basic category. Despite the change in strategy towards smart wearables, Fitbit and Garmin still achieved number 2 and 4, respectively. Xiaomi and Huawei, in 3<sup>rd</sup> and 5<sup>th</sup>, respectively, both grew over 550% on a year-over-year basis and helped offset the fall in basic wearables seen in recent quarters.

"The Western European wearables market is maturing. Brands in the top tiers strengthened their position and brand recognition plays a key role in consumer's top of mind," said Francisco Almeida. "However, it's a market where consumers are open to worthwhile value propositions. Despite the consolidation in the top of the market and the financial muscle required to get noticed, good products always have a fighting chance."

"Smart wireless headphones proved themselves well in 2018 in CEE, bringing clear value proposition in common daily activities to end users," said Jiří Teršel. "In light of that, this category more than doubled and reached almost 900 thousand units shipped, in fact outperforming the basic watches category even more than the year before."

The European wearable device market is expected to reach 53.1 million units shipped in 2023, totalling a market value of \$12.4 billion. In 2023, smart wearables will account for 51.7% of the market, driven by smartwatches. Basic wearables will grow mainly on account of earwear, along with a steady performance of the watch form factor.

Figure 1

**Top 5 Wearable Devices Companies in Europe by Shipment Volume, Market Share, and Year-Over-Year Growth, 2018Q4 (shipments in millions)**

Company	4Q18 Shipments	4Q18 Share	4Q17 Shipments	4Q17 Share	Year-over-Year Growth
Apple	3.36	28.7%	3.01	36.9%	11.5%
Fitbit	1.51	13.0%	1.43	17.5%	6.3%
Xiaomi	1.25	10.7%	0.12	1.4%	984.9%
Samsung	1.12	9.6%	0.62	7.6%	81.4%
Garmin	1.09	9.3%	0.92	11.3%	18.1%
Others	3.36	28.7%	2.07	25.3%	62.4%
Total	11.69	100%	8.16	100%	43.3%

Source: IDC Worldwide Quarterly Wearable Device Tracker, April 2019

Figure 2

**Top 5 Wearable Devices Companies in Europe by Shipment Volume, Market Share, and Year-Over-Year Growth, FY2018 (shipments in millions)**

Company	2018 Shipments	2018 Share	2017 Shipments	2017 Share	Year-over-Year Growth
Apple	8.60	30.4%	7.06	32.4%	21.9%
Fitbit	3.69	13.0%	3.98	18.3%	-7.2%
Garmin	2.79	9.9%	2.44	11.2%	14.5%
Samsung	2.42	8.5%	1.83	8.4%	32.0%
Xiaomi	2.21	7.8%	0.31	1.4%	609.9%
Others	8.60	30.4%	6.16	28.3%	39.6%
Total	28.30	100%	21.77	100%	30.0%

Source: IDC Worldwide Quarterly Wearable Device Tracker, April 2019

Figure 3

**European Wearable Devices Forecast by Product, Including Shipment Volumes, Market Share, and CAGR 2018-2023 (shipments in millions)**

Product	2018 Shipments	2018 Market Share	2023 Shipments*	2023 Market Share*	2018-2023 CAGR*
Watch	14.7	52.1%	33.2	62.5%	17.65%
Wrist Band	7.3	25.9%	5.6	10.5%	-5.26%
Earwear	6.0	21.2%	13.3	25.1%	17.30%
Other	0.2	0.8%	1.0	1.9%	33.40%
Total	28.3	100%	53.1	100%	13.43%

Source: IDC Worldwide Quarterly Wearable Device Tracker, April 2019

\*Note: All figures represent forecast data.

**IDC's Quarterly Wearable Device Tracker** provides worldwide market coverage and forecasts for the entire device space, covering more than 80 makers in the space in more than 40 countries — providing fast, essential, and comprehensive market information across the entire wearable device market.

For more information on IDC's EMEA Quarterly Wearable Device Tracker or other IDC research services, please contact Vice President Karine Paoli on +44 (0) 20 8987 7218 or at [kpaoli@idc.com](mailto:kpaoli@idc.com). Alternatively, contact your local IDC office or visit [www.idc.com](http://www.idc.com).

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