

Canalys: North American wearables market hits US\$2.0 billion in Q2 2019

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Thursday, 15 August 2019

The value of [North America's wearable band market](#) reached US\$2.0 billion in Q2 2019, with shipments up 38% at 7.7 million units. Driven by booming smartwatch sales, North America remains the world's most valuable wearable band market, despite being second to Greater China in terms of unit sales. In Q2 2019, more than 60% of Apple's 4.7 million global Watch shipments were into North America. Fitbit came second overall, with shipments up 18% thanks to it pushing more basic bands into the channel, but it failed to ship as many smartwatches as in Q2 last year.

North America wearable band shipments and annual growth
Canalys Wearable Band Market Pulse: Q2 2019

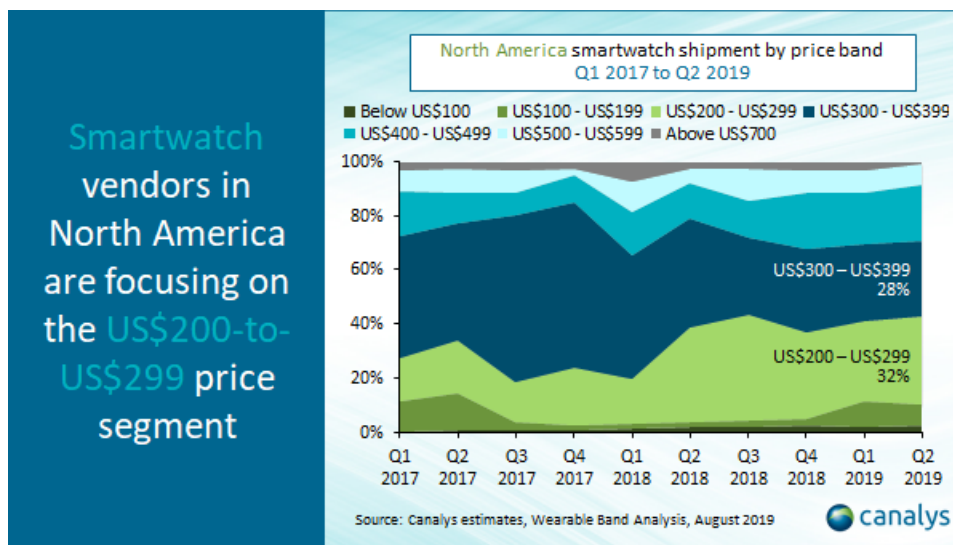
Vendor	Q2 2019 shipments (million)	Q2 2019 market share	Q2 2018 shipments (million)	Q2 2018 market share	Annual growth
Apple	2.9	37.9%	2.2	39.5%	+32%
Fitbit	1.9	24.1%	1.6	28.3%	+18%
Samsung	0.8	10.6%	0.4	6.7%	+121%
Garmin	0.5	7.0%	0.5	8.4%	+15%
Fossil Group	0.3	4.1%	0.2	4.3%	+34%
Others	1.3	16.3%	0.7	13.0%	+73%
Total	7.7	100.0%	5.6	100.0%	+38%

Note: percentages may not add up to 100% due to rounding

Source: Canalys Wearable Band Analysis (sell-in shipments), August 2019

Apple and Samsung contributed most of the region's value gains. "Smartwatch vendors are increasingly getting nearer the bullseye – hitting the right price point in a way that spurs massive

demand. With Samsung’s new Galaxy Watch branding in place, and showing robust performance, the company has moved to cultivate a fitness-focused line-up with the Galaxy Watch Active series, with prices between US\$200 and US\$300,” said Canalys Research Analyst Vincent Thielke. “Packing features into a compact form factor that has an appealing design is challenging but rewarding. Samsung most recently showcased these capabilities with its latest Watch Active 2 series, though other vendors are close behind.”



Fitbit’s attempt with the Versa Lite did not fare well. “There is certainly demand for affordable smartwatches with strong health and other intelligent features,” added Thielke, “but Fitbit’s misstep with the Versa Lite shows that consumers will shun overly pared-down smartwatches if they are not appropriately targeted, and especially when it’s obvious they are losing functionality,” added Thielke.

Cellular connectivity and actionable health insights are key catalysts for additional growth in the wearable band market. “Vendors are racing to announce LTE connectivity for their smartwatches,” said Canalys Senior Analyst Jason Low, “and it is becoming increasingly difficult to challenge Apple, which has been laying robust groundwork for cellular-connected devices. Apple is poised to reinforce its leading position by including aggregated health data, which can reveal new trends and insights, both for consumers and the broader healthcare ecosystem.”

For more information, please contact:

Canalys China

Cynthia Chen: cynthia_chen@canalys.com +86 158 2151 8439

Jason Low: jason_low@canalys.com +86 159 2128 2971

Canalys India

Rushabh Doshi: rushabh_doshi@canalys.com +91 99728 54174

Canalys Singapore

Ishan Dutt: ishan_dutt@canalys.com +65 8399 0487

Shengtao Jin: shengtao_jin@canalys.com +65 6657 9303

Canalys UK

Ben Stanton: ben_stanton@canalys.com +44 7824 114 350

Kelly Wheeler: kelly_wheeler@canalys.com +44 7919 563 270

Canalys USA

Vincent Thielke: vincent_thielke@canalys.com +1 650 644 9970

Marcy Ryan: marcy_ryan@canalys.com +1 650 862 4299

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China: Room 310, Block A, No 98 Yanping Road, Jingan District, Shanghai 200042, China

India: 43 Residency Road, Bengaluru, Karnataka 560025, India

Singapore: 133 Cecil Street, Keck Seng Tower, #13-02/02A, Singapore 069535

UK: Diddenham Court, Lambwood Hill, Grazeley, Reading RG7 1JQ, UK

USA: 319 SW Washington #1175, Portland, OR 97204 USA

email: contact@canalys.com | web: www.canalys.com