

STRATEGY ANALYTICS INSIGHT

SpecTRAX

BlackBerry Curve 8520 Takes Shelf Share Top Spot in Q1 2010

5 July 2010

Snapshot

During May 2010 another 61 new handsets were announced globally by 21 vendors. Panasonic's 842P and 942P were the highlight this month, the former because of its 10mm slim clamshell design, and the latter because it packs a 13.2 MP CMOS camera module. Our Q1 2010 shelf share analysis of 140 mobile network operators revealed that Research in Motion's BlackBerry Curve 8520 moved up one place to top the chart, appearing in the product portfolios of 58 of the 140 network operators tracked in 29 countries around the world, more than any other handset model at the time.

Analysis

This report summarises the key features and trends of the 61 new handsets announced during May 2010 for which detailed specifications were available. Very limited details were available for another 65 new handsets and they have been excluded from this analysis until full specs become available. Note that the charts are likely to change slightly as data for other handsets announced during the latest period become available in the coming months.

In addition, the report summarises the product portfolios of 140 mobile network operators around the world, highlighting the top 10 handset models by shelf share in North America, Europe and Asia.

General Highlights

Some of the highlights from May's 61 new handset announcements include:

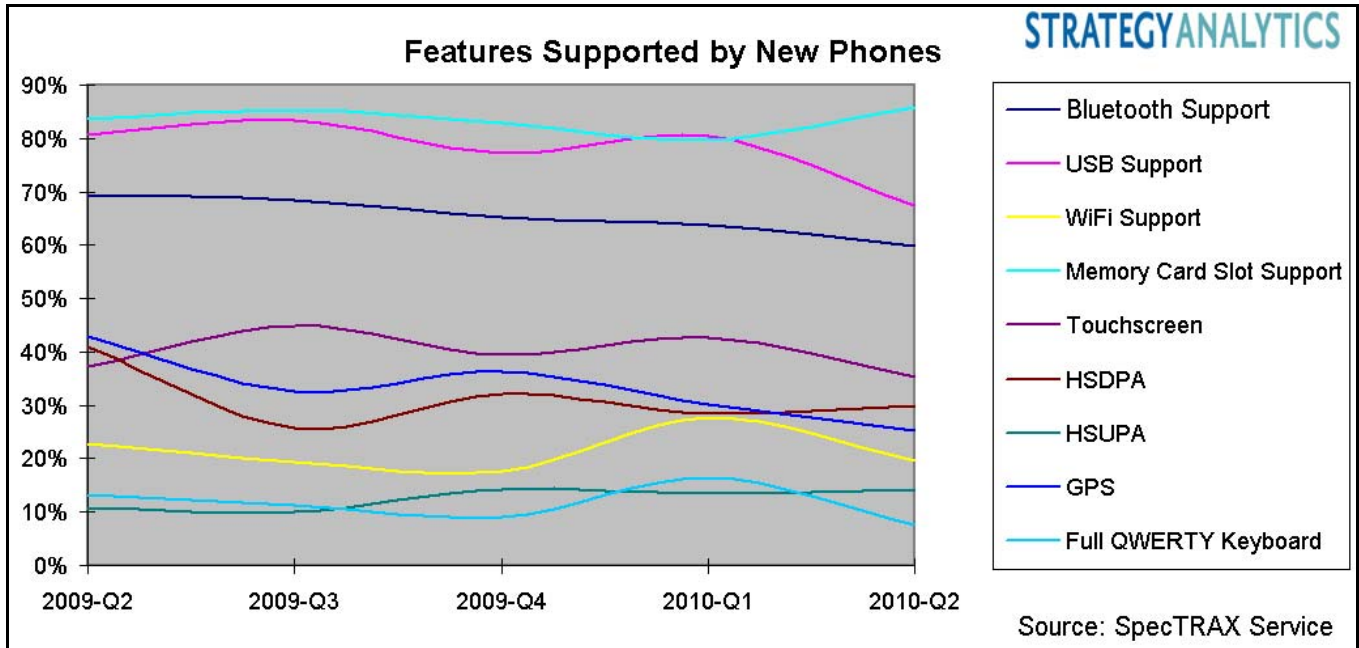
- Penetration of Bluetooth, WiFi and GPS in new handsets are at their lowest levels for over a year, due to an increase in the number of low-end model announcements.
- 25 touchscreen phones (41% of the 61 new models), 21 of which are using capacitive and only 4 of which are using resistive technology;
- 55 new models (90%) were announced with a memory card slot, all of which are microSD-based. Six of these models can support 32GB memory card capacity (microSDHC) and a further 19 support cards up to 16GB.

Average Phone Specs by Quarter						STRATEGYANALYTICS		
Quarter Announced	2009-Q2	2009-Q3	2009-Q4	2010-Q1	2010-Q2	Mar-10	Apr-10	May-10
No. of handsets with full specs	341	330	359	331	147	100	86	61
Average Handset thickness (mm)	14.92	14.63	14.52	14.55	14.54	14.42	14.59	14.46
Average Handset Weight (gm)	108.5	106.7	103.8	118.3	104.8	145.5	103.8	106.0
Average Screen Size (inches)	2.54	2.58	2.61	2.69	2.56	3.11	2.47	2.68
Average Camera Resoultion (MP)	2.87	2.49	2.95	2.58	2.97	2.95	3.01	2.93
Bluetooth Support	70%	68%	65%	64%	60%	60%	65%	52%
USB Support	81%	83%	77%	80%	67%	79%	63%	74%
WiFi Support	23%	19%	18%	28%	20%	25%	22%	16%
Memory Card Slot Support	84%	85%	83%	80%	86%	76%	83%	90%
Touchscreen	37%	45%	40%	43%	35%	43%	31%	41%
HSDPA	41%	26%	32%	28%	30%	23%	34%	25%
HSUPA	11%	10%	14%	14%	14%	3%	17%	10%
GPS	43%	33%	36%	30%	25%	25%	30%	18%
Full QWERTY Keyboard	13%	11%	9%	16%	7%	10%	8%	7%
Average Battery Capacity (mAh)	1036	1028	1027	1030	1006	1062	965	1023
Average Talk Time (minutes)	314	342	358	394	376	373	322	384
Average Standby Time (hours)	303	332	334	356	375	319	314	369

* The table above shows the average of all phone announcements. It does not take into account handset sales.

** Handsets with very limited data are ignored until full specs become available

Source: SpecTRAX Service



During May 2010, Samsung announced another 20 new handsets, although detailed information is currently available for only 5 models. Data on the remaining 15 handsets will be added to SpecTRAX as and when it becomes available. LG announced 12 new handsets, of which 4 are currently specified in enough detail to be included in our analysis. The table below shows the average specs for the new models for a selection of companies.

- Sony Ericsson's two new phones, BRAVIA Phone S004 and Cybershot S003, are both highly spec'd, giving Sony Ericsson the best figures this month in most categories except for handset thickness, on which the company scores badly this month.
- Five of Nokia's new models were variations on the C1-00, C1-01 and C1-02 low end devices, the C1-00 being the most basic of the five.

Average Specs by Vendor for Recent Announcements

Period: May 2010	Nokia	Samsung	LG	Sony Ericsson	ZTE	NEC	Lenovo	TOTAL
Number of new models	6	5	4	2	4	4	3	61
Average Handset thickness (mm)	13.45	13.44	12.65	17.80	13.40	14.58	14.60	14.46
Average Handset Weight (gm)	86	88	86	150	88	117	111	106
Average Screen Size (inches)	1.90	2.27	2.20	3.20	2.30	3.18	2.73	2.68
Average Camera Resolution (MP)	1.87	2.77	3.00	10.09	1.77	7.63	2.73	2.93
Bluetooth Support	83%	60%	50%	100%	50%	50%	100%	52%
USB Support	83%	60%	75%	0%	75%	100%	0%	74%
WiFi Support	17%	40%	0%	50%	0%	25%	33%	16%
Memory Card Slot Support	83%	60%	50%	100%	75%	100%	100%	90%
Touchscreen	0%	60%	50%	0%	25%	25%	33%	41%
HSDPA	17%	40%	25%	0%	25%	100%	0%	25%
HSUPA	17%	0%	0%	0%	0%	75%	0%	10%
GPS	17%	20%	0%	100%	0%	50%	0%	18%
Full QWERTY Keyboard	17%	0%	0%	0%	0%	0%	0%	7%

* The table above shows the average of all phone announcements. It does not take into account handset sales.

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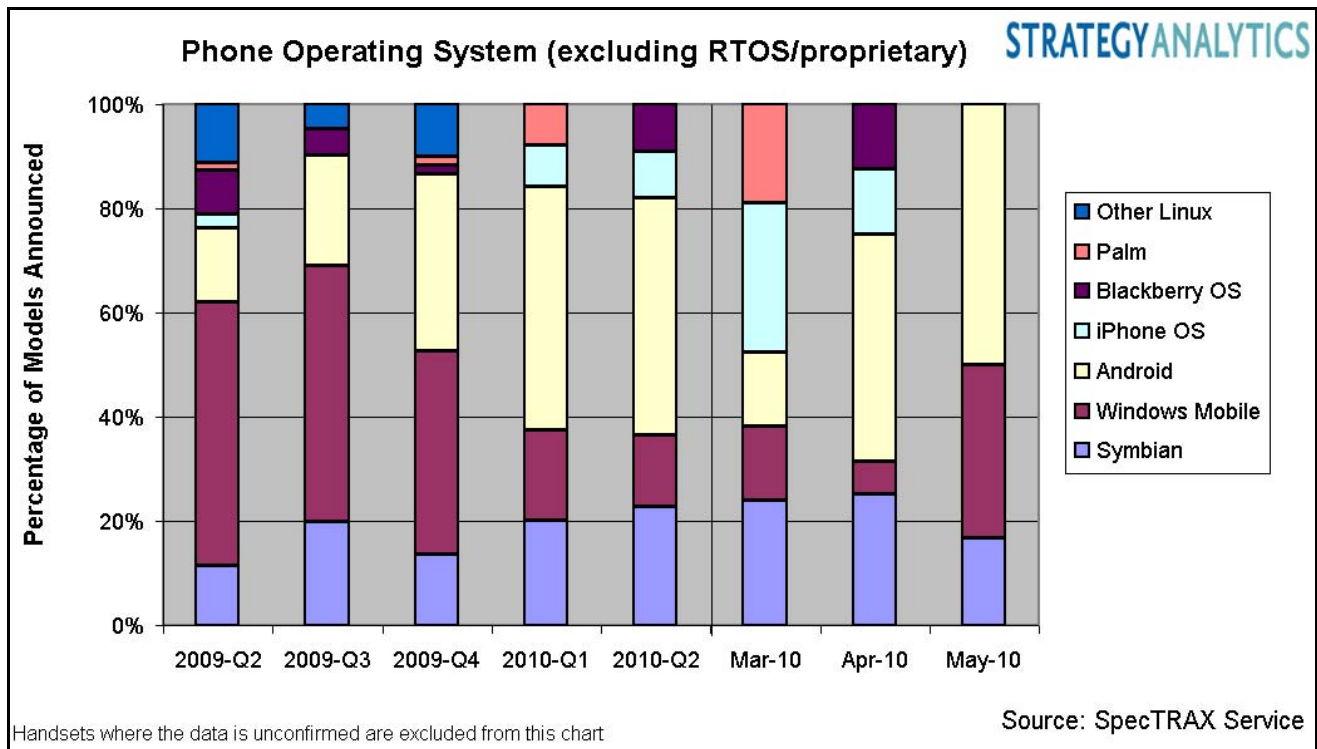
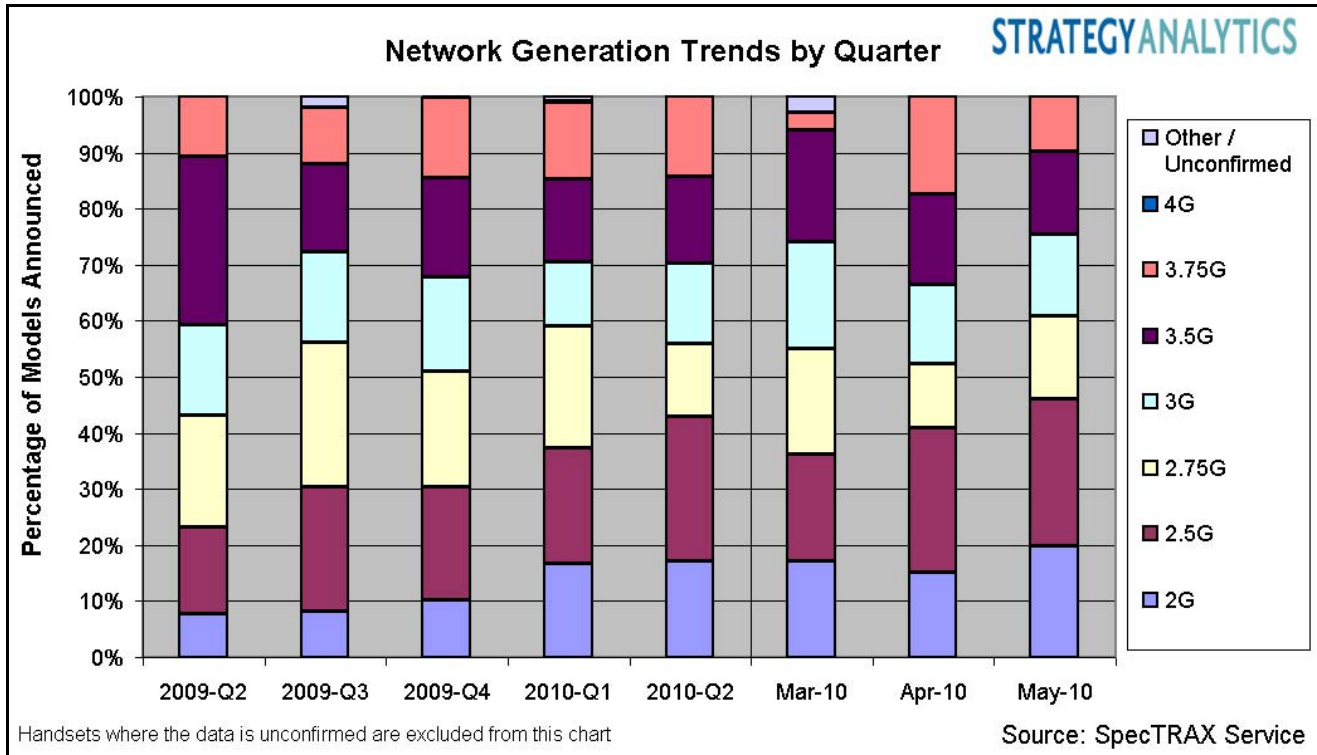
Network generation

Of the new phones announced during May 2010, an unusually high 61% of them did not support 3G networks. Surprisingly the number of new GSM/GPRS handset models has been increasing steadily over the past year, the majority of which are targeted at China, India and other emerging markets.

Operating Systems

The vast majority of new handsets announced during May 2010 run on an RTOS or proprietary operating system. Only 6 of the 61 new models run a high level OS, of which...

- 2 are Windows Mobile-based (Haier U69-1 and -2)
- 3 are running Android (Acer Liquid Stream S110-1 and -2 and Samsung i5500 Galaxy 5)
- 1 is Symbian-based (Nokia E73 Mode)



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Largest display

Average display size for the new handsets announced in May was 2.68 inches, slightly higher than for those announced in April, but lower than the unusually high March figure which was influenced by the six Apple iPad models with a 9.7-inch screen. The recent devices with the largest displays were:

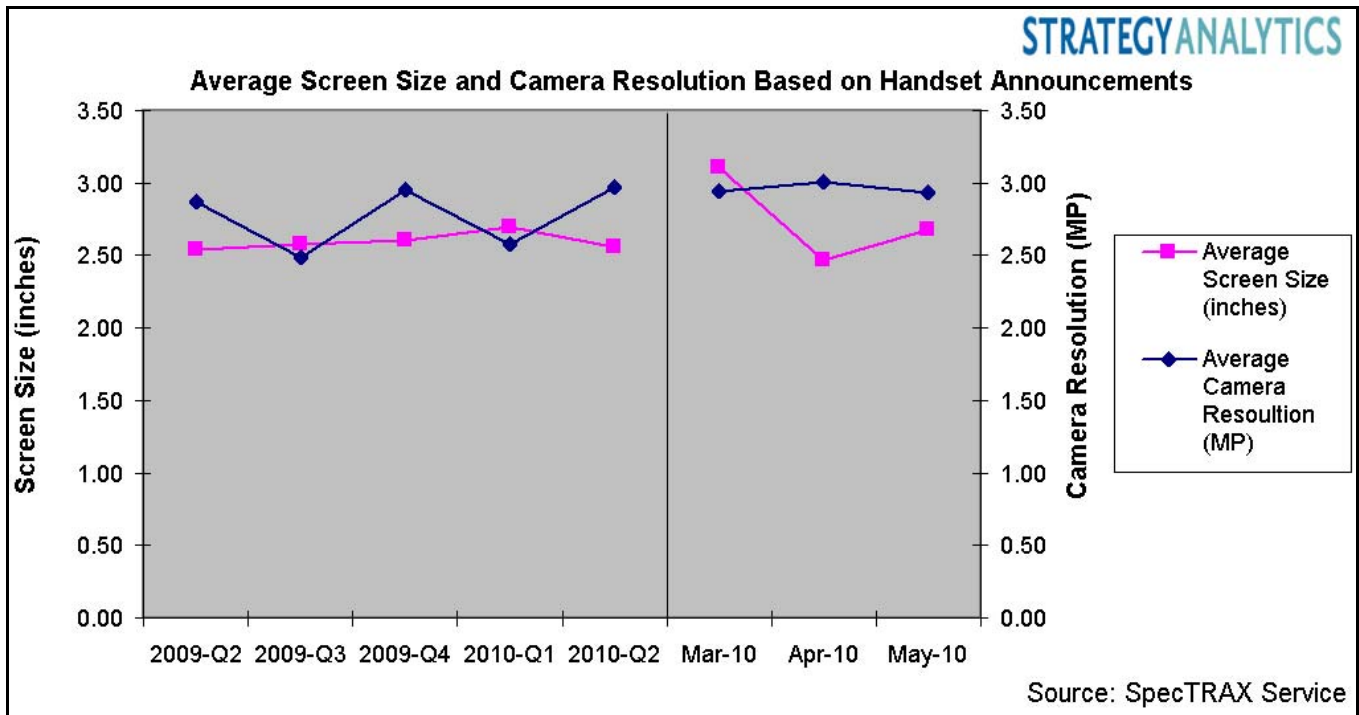
- Acer Liquid Stream S110, Gopell A988 and Haier X80 (all 3.7 inches)

QVGA (320x240 pixels) still just about remains the most popular resolution, accounting for 16 of the 61 new models. WQVGA (15 handsets) and WVGA (10 handsets) resolutions continue to increase in popularity.

Biggest Camera

In the last few months we have seen a new milestone reached in cameraphone technology with 13.2 MP CMOS image sensors appearing in phones in Japan. Fujitsu's F-06B was the first to be announced, followed shortly by Panasonic's P-04B and more recently the Panasonic 942P. Despite these advancements at the high-end, the average camera resolution for new announcements over the last three months has remained steady at around 3 MP. The handsets with the highest resolution cameras announced during May 2010 were:

- Panasonic 942P (13.2 MP)
- NEC N-04B and Sony Ericsson Cybershot S003 (both 12 MP)



Thinnest handsets

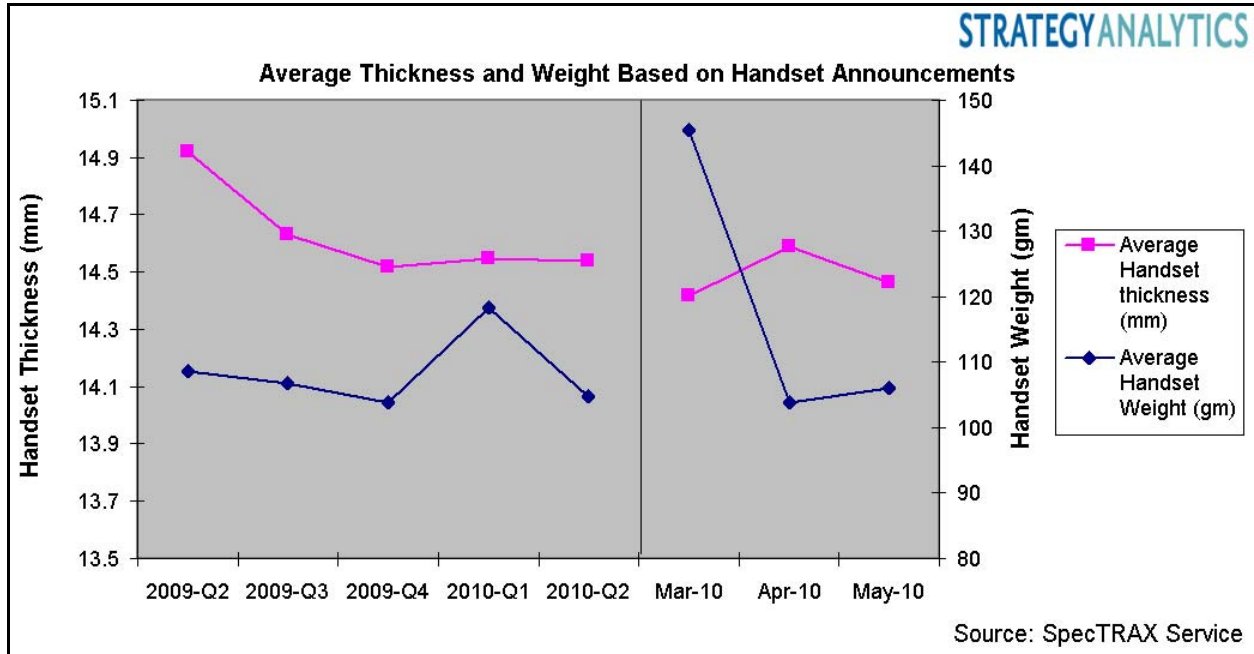
The average thickness of new models in May 2010 was 14.46 mm, showing very little variation of the past three months. Surprisingly, the thinnest model announced during May 2010 was a clamshell, the beautifully designed Panasonic 842P at just 10mm thin. The three thinnest handsets announced in January were:

- Panasonic 842P (10.0 mm)
- Nokia E73 Mode (10.1 mm)
- Acer Liquid Stream S110 and Hisense E300 (both 11.2 mm)

Lightest handsets

Average handset weight for the new handsets announced in May 2010 was 106.0 grams, up slightly from the previous month, but similar to the average for 2009. The blip in March 2010 was due to the six Apple iPad models which were 680 grams for the WiFi versions and 730 grams for the 3G versions. Of the new models announced in May 2010, the three lightest handsets, not including USB Dongles or watch phones, were:

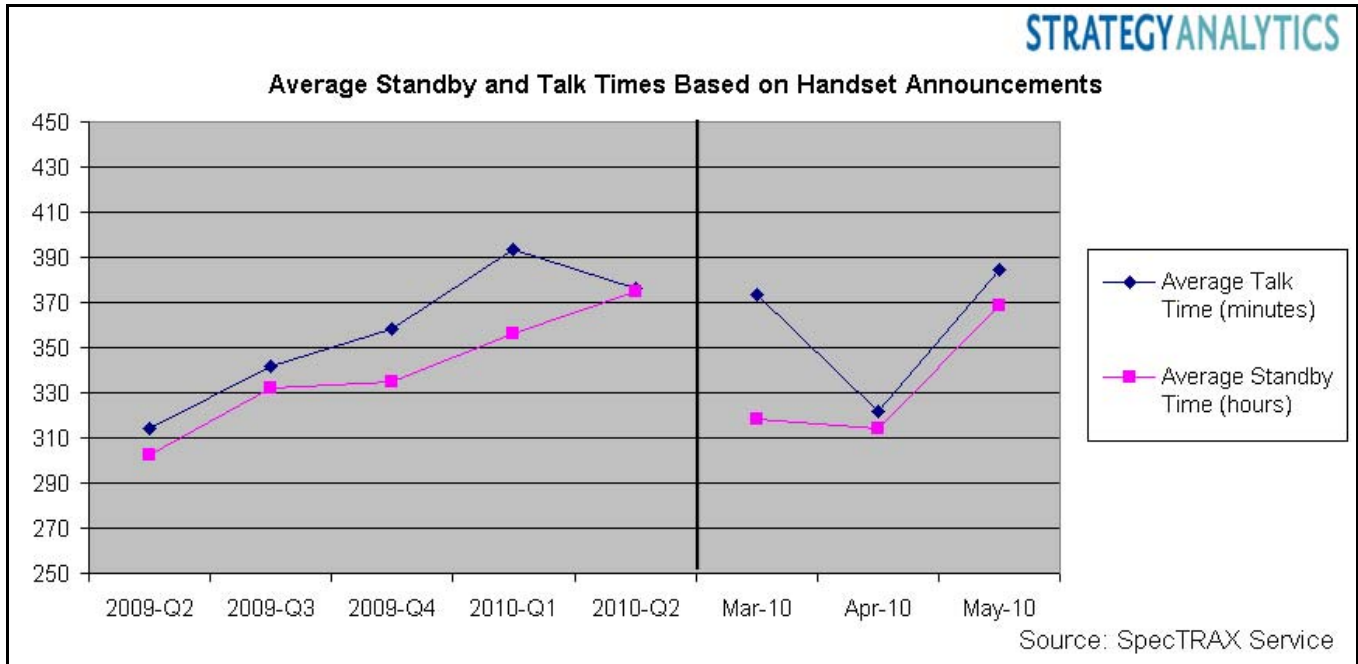
- Samsung E1081T (64.5g)
- LG GS107A (70.0g)
- Samsung E1175T and ZTE S160 (both 72.0g)



Talk Time, Standby Time and Battery Capacity

Average talk-time and standby time were up significantly from April to May 2010, but still below the average levels for Q1 2010, when an unusually high number of entry level models were announced. Average battery capacity of models announced during May 2010 was 1022 mAh, down slightly from Q1 2010.

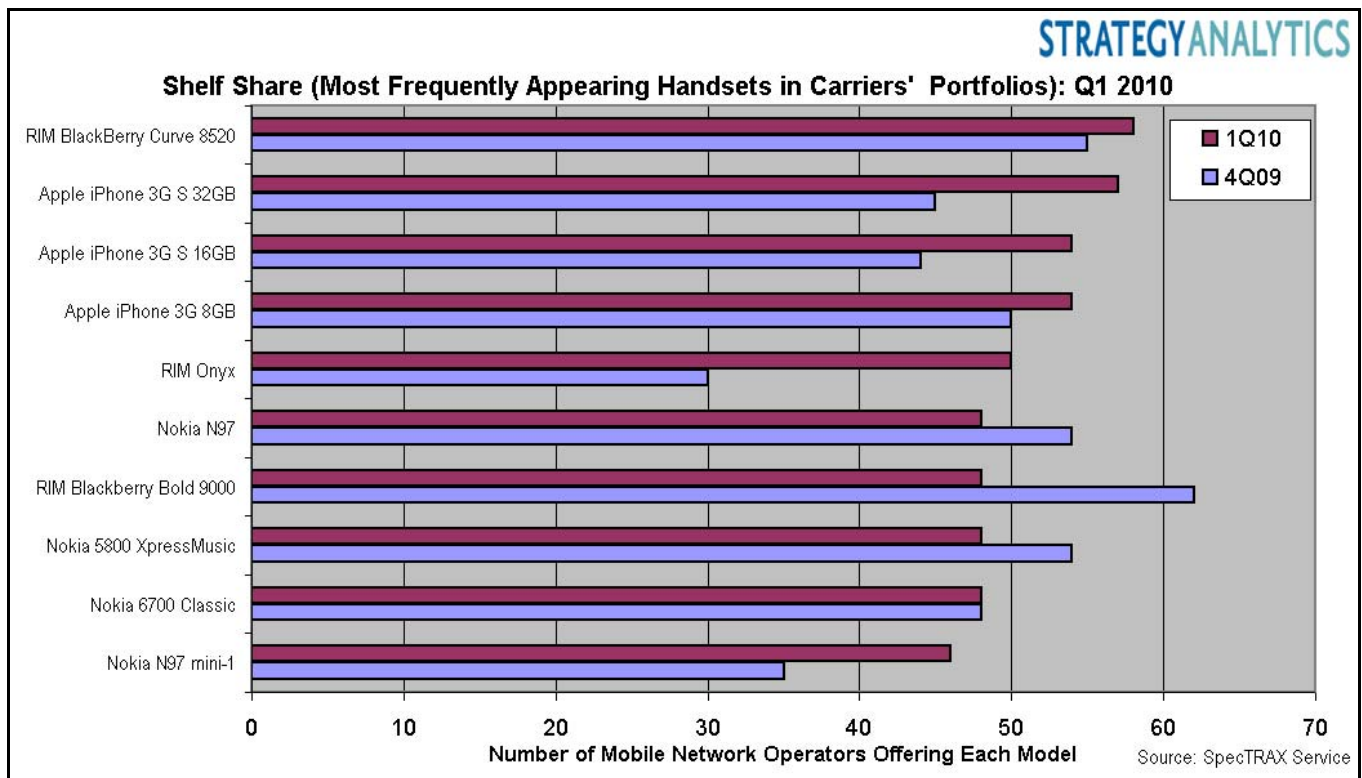
- Nokia C1-00 (780 minutes talk time and 1152 hours standby)
- Samsung B7722 (780 minutes talk time and 420 hours standby)
- Nokia E73 Mode (780 minutes talk time and 384 hours standby)



Handset Availability (Quarterly Analysis of Q1 2010 Data)

The BlackBerry BOLD 9000 was finally pushed off top spot in Q1 2010, having been the model appearing on most network operators' shelves during 2009. However, there was still no change in the manufacturer of the most frequently appearing model, as Research in Motion's Curve 8520 moved up one place to take first place in Q1 2010, appearing in the product portfolios of 58 of the 140 network operators tracked in 29 countries around the world.

- The ten most popular handsets by shelf share have changed significantly since Q4 2009. Nokia's N97 is the highest placed model from the Finnish giant, but only reached sixth spot, while three of the top four places were taken by variations of Apple's iPhone.
- The top ten handsets by carrier shelf share now consist of 4 Nokia models, 3 iPhones and 3 BlackBerrys.



On a regional level Research in Motion dominated North American shelves during Q1 2010, taking 5 of the top 10 places, with the BlackBerry Curve 8830 in top spot.

In Europe, the list is dominated by 6 Nokia models, with the N97 mini appearing on more shelves than any other model in Europe. The top 10 is completed by two Samsung models, one from HTC and one BlackBerry.

Across the 11 countries tracked in the Asia Pacific region, Nokia's historical dominance continues to be threatened by BlackBerry and now Apple. Nokia only had four of the top 10 phones in Asia during Q1 2010, and none in the top 5. Three versions of the Apple iPhone appear on more shelves in Asia than the Nokia N97, Nokia's top model, while Research in Motion tops the list with the BlackBerry BOLD 9000 and a couple of other models in the top 5.

Most Frequently Appearing Handsets in Carriers' Product Portfolios: Q1 2010

Rank North America

- 1 RIM Blackberry Curve 8330
- 2= RIM Blackberry Tour 9630
- 2= RIM Pearl 8230 'Apex' Flip Phone
- 4= HTC Rhodium W
- 4= RIM Blackberry Storm 9530
- 4= LG AX265
- 4= RIM Curve 8530 'Aries'
- 8= Samsung SCH-i910
- 8= Apple iPhone 3G S 32GB
- 8= Apple iPhone 3G S 16GB

Rank Europe

- 1= Nokia N97 mini-1
- 1= Nokia 6700 Classic
- 3 Nokia 5230-1
- 4 Nokia 2330 classic
- 5= Samsung S3650 Corby
- 5= HTC HD2 T8585
- 7= Nokia 2730 classic
- 7= Samsung GT-S8000 Jet
- 9= Nokia 5800 XpressMusic
- 9= RIM BlackBerry Curve 8520

Rank APAC

- 1 RIM Blackberry Bold 9000
- 2 Apple iPhone 3G 8GB
- 3= RIM BlackBerry Curve 8520
- 3= RIM Onyx
- 3= Apple iPhone 3G S 32GB
- 6 Apple iPhone 3G S 16GB
- 7 Nokia N97
- 8 Nokia E72
- 9= Nokia N86 8MP
- 9= Nokia 2730 classic

Source: SpectRAX Service

Contact Information

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