

Canalys: Baidu Beats Google in Q2 Smart Speaker Stakes

Written by Marco Attard
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The global smart speaker market totals 26.1 million units in Q2 2019, Canalys reports-- a 55.4% Y-o-Y increase, with Amazon taking the lead while Baidu beats Google to 2nd place despite serving solely the Chinese market.

Worldwide smart speaker shipments and annual growth

Canalys smart speaker market pulse: Q2 2019

Vendor	Q2 2019 shipments (million)	Q2 2019 market share	Q2 2018 shipments (million)	Q2 2018 market share	Annual growth
Amazon	6.6	25.4%	4.1	24.5%	61.1%
Baidu	4.5	17.3%	0.1	0.7%	3700%
Google	4.3	16.7%	5.4	32.3%	-19.8%
Alibaba	4.1	15.8%	3.0	17.7%	38.8%
Xiaomi	2.8	10.8%	2.0	12.2%	37.5%
Others	3.7	14.1%	2.1	12.7%	73.3%
Total	26.1	100.0%	16.8	100.0%	55.4%



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

Source: Canalys Smart Speaker Analysis (sell-in shipments), August 2019

Amazon Echo smart speakers total 6.6m units in Q2 2019, a 61.1% Y-o-Y increase, while Baidu shipments are up by an impressive 3700% Y-o-Y to 4.5m units following a Q2 2019 reentry in the market with the Xiadu range of devices. It should come to little surprise that China is the biggest global market for smart speakers, with quarterly shipments of 12.6m units, over twice a US market of 6.1m units.

"Amazon and Google are focused on growing their business outside the US," the analyst says. "Google's transition to the Nest branding while pivoting to smart displays proved to be a challenge, especially as it has begun rolling out its Nest Hubs smart display globally. Google urgently requires a revamped non-display smart speaker portfolio to rekindle consumer interest, as well as a robust marketing strategy to build its Nest branding outside of the US."

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In the meantime vendors face the challenge of pivoting to more complex devices in the short term, with most looking to integrate displays. Canalys points out vendors are wary of price sensitivity towards the relatively new smart display category. As such, expect experimentation with price points and value propositioning strategies, even if uncovering unique use-cases with a strong focus on voice-first interfaces on smart displays should be the top priority for vendors.

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