

European Smartwatch - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

European Smartwatch Market Analysis

The European smartwatch market stands at USD 6.77 billion in 2025 and is forecast to climb to USD 11.33 billion by 2030, translating into a 10.85% CAGR. Growth is propelled by demand for clinical-grade health monitoring, steady LTE/5G roll-outs, and rapid uptake of NFC-based payments. Regulatory clarity on device safety and data privacy underpins consumer confidence, while circular-economy rules encourage premium-segment replacement cycles. Platform providers tighten ecosystem integration to lock in users, and carriers bundle smartwatch connectivity to lift average revenue per user. Manufacturing advances in high-brightness displays and low-power chipsets enlarge the addressable base of seniors, outdoor enthusiasts, and enterprise users.

European Smartwatch Market Trends and Insights

Growing Adoption of Health and Fitness Monitoring

European consumers increasingly view smartwatches as clinical tools, not lifestyle add-ons. The Pixel Watch 3 gained FDA clearance for Loss-of-Pulse detection, setting a precedent for on-wrist medical diagnostics. Samsung's BioActive Sensor now includes advanced glycation measurements that flag metabolic risk. Withings' ScanWatch Nova extends battery life to 30 days while adding ECG, SpO₂, and temperature sensors. Insurers use these readings to refine risk scoring and reimbursement models, strengthening demand. Hospitals pilot remote-patient-monitoring programs that feed continuous vitals into electronic health records, lowering follow-up visits.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Expansion of LTE/5G-Enabled Standalone Watches

Carrier eSIM activation removes the smartphone tether and positions smartwatches as safety devices for children, seniors, and outdoor athletes. Vodafone's OneNumber plan at GBP 7.50 per month allows a single data allowance across wrist and phone, driving penetration in the UK and Italy. Manufacturers re-engineer antennas and battery housings to maintain sub-13 mm thickness while meeting 24-hour endurance targets. Independent connectivity underpins fall detection, SOS messaging, and over-the-air diagnostics, widening addressable segments. Carriers benefit from incremental service revenue and lower churn, prompting cross-selling into family plans.

GDPR-Driven Data-Privacy Concerns

Smartwatch vendors must appoint EU representatives, conduct algorithm risk assessments, and store sensitive biometric data inside the EEA. Germany's regulator fined several fitness-app operators in 2025 for inadequate consent workflows, raising awareness among consumers. The forthcoming AI Act classifies on-device predictive health scoring as high risk and mandates human-override options. Compliance raises firmware and legal costs, slowing releases from smaller Asian brands lacking local counsel. Some firms offset by adding on-device processing, reducing cloud uploads, and offering paid data-sovereignty tiers for enterprise clients.

Other drivers and restraints analyzed in the detailed report include:

Rise of Contactless Payments via NFC-Enabled Watches / Corporate Wellness Subsidies for Smartwatches / Margin Pressure from Mid-/Low-Tier ASP Erosion /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The European smartwatch market logged 54.30% share for watchOS in 2024, translating into the largest installed base of apps and accessories. HarmonyOS, pre-loaded across all new Huawei wearables from 2025, is projected to record a 17.60% CAGR as Chinese expatriate communities and value-seekers migrate to the ecosystem. Wear OS maintains relevance through Samsung's Galaxy Watch6 and Google's Pixel Watch 3, anchoring Android phone users who value Google Assistant and Play Store access.

Sustained competition now hinges on cross-device continuity. Apple syncs medication reminders across watch, phone, and Mac, while Huawei pairs smartwatches with Harmony-powered cars for keyless entry. The European smartwatch market increasingly rewards platforms able to localize apps such as Monese banking or Deezer music for each language. Compliance updates for GDPR appear fastest on watchOS, giving Apple an enterprise edge, though Huawei offsets by open-sourcing compliance libraries to local developers.

AMOLED held 71.00% European smartwatch market size in 2024 owing to mature supply chains and thin form factors. Micro-LED promises double-the-nits brightness and 30% power savings, supporting sunlight readability at ski resorts and Mediterranean beaches. The technology is forecast to grow at a 21.05% CAGR once backend yields rise and wafer-level mass transfer costs fall.

Luxury makers such as TAG Heuer and Montblanc have reserved early Micro-LED batches for USD 1,500-plus SKUs, banking on early-adopter willingness to pay. TFT-LCD survives in sub-EUR 80 price bands and kids' trackers where battery longevity trumps color depth. The European smartwatch industry may see dual-sourcing models where mid-range lines adopt hybrid OLED backplanes while testing Micro-LED pilots in 2027.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The European Smartwatch Market Report is Segmented by Operating System (watch OS, Harmonyos, and More), Display Technology (AMOLED, Micro-LED, and More), Application (Personal Assistance and Notifications, Fitness and Sports, and More), End-User Demographic (Gen Z (18-24), Millennials (25-40), and More), Distribution Channel (Online (E-Commerce and Brand. Com), Offline - CE Retail, and More), and Geography.

List of Companies Covered in this Report:

Apple Inc. / Samsung Electronics Co., Ltd. / Huawei Technologies Co., Ltd. / Garmin Ltd. / Fitbit (Alphabet Inc.) / TAG Heuer SA / Fossil Group Inc. / Polar Electro Oy / Withings SAS / Xiaomi Corporation / Suunto Oy / Mobvoi Inc. / Amazfit (Zepp Health) / Montblanc (Richemont) / Citizen Watch Co., Ltd. / Casio Computer Co., Ltd. / Oppo Co., Ltd. / OnePlus Technology Co., Ltd. / Alpina (Frederique Constant Group) /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Growing adoption of health and fitness monitoring

4.2.2 Expansion of LTE/5G-enabled standalone watches

4.2.3 Rise of contactless payments via NFC-enabled watches

4.2.4 Corporate wellness subsidies for smartwatches

4.2.5 EU digital-product-passport push for circular electronics

4.3 Market Restraints

4.3.1 GDPR-driven data-privacy concerns

4.3.2 Margin pressure from mid-/low-tier ASP erosion

4.3.3 Micro-LED display supply constraints

4.4 Value Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Intensity of Competitive Rivalry

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.7.5 Threat of Substitutes

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Operating System

5.1.1 watchOS

5.1.2 Wear OS (Android)

5.1.3 HarmonyOS

5.1.4 Proprietary / Other OS

5.2 By Display Technology

5.2.1 AMOLED

5.2.2 Micro-LED

5.2.3 TFT-LCD / MIP

5.3 By Application

5.3.1 Personal Assistance and Notifications

5.3.2 Health and Medical Monitoring

5.3.3 Fitness and Sports

5.3.4 Payments and Commerce

5.4 By End-user Demographic

5.4.1 Gen Z (18-24)

5.4.2 Millennials (25-40)

5.4.3 Gen X (41-56)

5.4.4 Seniors (57+)

5.5 By Distribution Channel

5.5.1 Online (E-commerce and Brand.com)

5.5.2 Offline - CE Retail

5.5.3 Offline - Watch and Jewellery

5.5.4 Telco Carriers

5.6 By Country

5.6.1 United Kingdom

5.6.2 Germany

5.6.3 France

5.6.4 Italy

5.6.5 Spain

5.6.6 Netherlands

5.6.7 Nordics (SE, NO, DK, FI)

5.6.8 Rest of Europe

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Apple Inc.

6.4.2 Samsung Electronics Co., Ltd.

6.4.3 Huawei Technologies Co., Ltd.

6.4.4 Garmin Ltd.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.5 Fitbit (Alphabet Inc.)
- 6.4.6 TAG Heuer SA
- 6.4.7 Fossil Group Inc.
- 6.4.8 Polar Electro Oy
- 6.4.9 Withings SAS
- 6.4.10 Xiaomi Corporation
- 6.4.11 Suunto Oy
- 6.4.12 Mobvoi Inc.
- 6.4.13 Amazfit (Zepp Health)
- 6.4.14 Montblanc (Richemont)
- 6.4.15 Citizen Watch Co., Ltd.
- 6.4.16 Casio Computer Co., Ltd.
- 6.4.17 Oppo Co., Ltd.
- 6.4.18 OnePlus Technology Co., Ltd.
- 6.4.19 Alpina (Frederique Constant Group)

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

European Smartwatch - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

