

# **Global Rugged Phones Market: Analysis By Type (Smartphones and Featured Phones), By Screen Size (Below 5 Inch, 5 Inch to 6 Inch and Above 6 Inch), By End User (Industrial, Government Commercial, Military & Defense, and Consumer), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029**

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## **Abstracts**

The global rugged phones market was valued at US\$3.13 trillion in 2023. The market value is expected to reach US\$4.97 trillion by 2029. A rugged phone is a phone specifically designed to withstand harsh environments, extreme conditions and rough use. They can handle drops, shocks, water, dust, and extreme temperatures. These phones typically feature a durable design, shock-resistant casing, dust and water-resistant seals, and a large battery that lasts several days, sometimes even weeks. These phones are commonly used by outdoor enthusiasts, adventurers, and people working in heavy industries such as construction, mining, and other similar areas where normal mobile phones do not survive for long.

Looking ahead, the rugged phones market is expected to continue its growth trajectory for several reasons. The increasing adoption of digital technologies such as automation which requires interaction with smart devices. As more and more industries take on digital transformation, the use of rugged phones for various industrial end-users is increasing. Additionally, continued innovation in rugged phones, including the incorporation of technologies like Artificial Intelligence and the adaptation to evolving market trends such as Internet of Things (IoT), positions the rugged phones market for ongoing growth. The market is expected to grow at a CAGR of approx. 8.3% during the forecasted period of 2024-2029.

## Market Segmentation Analysis:

**By Type:** The report provides the bifurcation of the global rugged phones market into two types: Smartphones and Featured Phones. The Smartphones segment held the highest share of the market. Rugged smartphones are reinforced smartphones designed to withstand all climatic conditions and are sealed with a rugged case to protect against shock, dust, water and other conditions. They are built with high-performance and durable materials, which can operate efficiently even after a heavy fall or exposure to water, dust, or mud. Such phones are used by military personnel in extreme environments such as snow-clad mountains and desert areas where there is little chance of receiving an incoming call due to poor network connectivity. Therefore, these phones are in great demand in the military and defence sector, gaming sector, etc.

**By Screen Size:** The global rugged phones market has been further analyzed based on the screen size: Below 5 Inch, 5 Inch to 6 Inch and Above 6 Inch. The 5 inch to 6-inch segment held the highest share in the market as the investment in 5 inch to 6-inch rugged phones is growing due to the increasing need for durable smartphones in sectors like the military, law enforcement, oil and gas extraction rigs, and many other markets where the environment is demanding. Additionally, the market is growing as a result of the incorporation of cutting-edge technology including ruggedized touchscreens, longer-lasting batteries, and specialized software designed for industrial applications.

**By End User:** The report identifies five segments of the global rugged phones market on basis of end user: Industrial, Government Commercial, Military & Defense, and Consumer. The industrial segment held the largest share of the market in 2023. As the demand for reliability, ease of use, significant intelligence, advances in mesh networks in the industrial sector is expanding, and the penetration of robotics, process control, automation, and Industry 4.0 is booming. These factors play a vital role in boosting the adoption rate of rugged phones.

**By Region:** In the report, the global rugged phones market is divided into five regions: North America (The US, Canada, and Mexico), Europe (UK, Germany, Russia, France, Italy, and Rest of Europe), Asia Pacific (China, Japan, South Korea, India, Australia and Rest of Asia Pacific), South America and Middle East and Africa. In 2023, the North America region led the rugged phones market, propelled by presence of huge industrial sector and high investments in research and development activities related to

smartphones. Boasting a diverse array of industries, including transportation, oil & gas, and healthcare, the region exhibits immense potential for rugged phone usage. Hence, the rise in the proliferation of smartphones & feature phones with rugged capabilities across industry sectors is driving the rugged phones market in North America. Looking ahead, Asia Pacific is projected to grow significantly from 2024 to 2029, propelled by increasing trend of industry & factory automation and digitalization across industries coupled with growing government expenditure in Asian countries such as China and India.

During 2024-2029, the US is forecasted to maintain its lead within North America. The US government encourages the manufacturers to expand their operations within national borders, which is fueling the expansion of the manufacturing industry, directly impacting the adoption of rugged phones in the US.

#### Market Dynamics:

**Growth Drivers:** The global rugged phones market growth is predicted to be supported by numerous growth drivers such as rise in proliferation of smartphones with rugged capabilities, growing demand from logistics & warehouse operations, expanding construction and real estate sector, extensive applications in manufacturing sector, digital transformation, and many other factors. The surging popularity of outdoor activities such as hiking, camping, and adventure sports has created a demand for rugged phones among outdoor enthusiasts. In outdoor scenarios, such phones provide durability, protection against extreme conditions, and long-lasting battery life to meet the demand. Outdoor sports enthusiasts benefit from rugged phones that can withstand harsh environments while providing communication, navigation, and tracking features. Thus, the demand for rugged phones has been driven by the surging popularity of adventure sports and outdoor activities, as well as the need for reliable and durable mobile devices in outdoor and remote areas.

**Challenges:** However, the market growth would be negatively impacted by various challenges such as inferior performance and high cost compared to consumer models and growing acceptance of consumer-grade phones over rugged phones, etc.

**Trends:** The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as escalating 5G deployments, integration of AI technology, growth of industry 4.0, advances in healthcare technology, etc. The continued innovation in rugged phones, including the incorporation of technologies like Artificial Intelligence and the adaptation to evolving market trends such as Internet of Things

(IoT), positions the rugged phones market for ongoing growth.

#### Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic had an influence on different industries around the world, resulting in travel prohibitions, global lockdown, temporary business closures as well as supply chain and manufacturing disruptions, which in turn reduced the development of telecom infrastructure activities and had an adverse impact on the sales and marketing efforts of rugged phone companies operating in the market. There was a disruption in the manufacturing capabilities of rugged phone manufacturers, especially in cases where manufacturing is based in China and other Asian countries. All these factors have impacted the revenue and growth of rugged phones market globally. The effects were severe, particularly for small to medium sized businesses operating in this industry. However, ongoing restructuring efforts taken by companies to tackle the supply chain issues and increased coordination with sales partners and suppliers helped in reducing the negative impact to some extent.

#### Competitive Landscape:

The global rugged phones market is extremely competitive and consists of various global and regional players. Major players in the market are increasingly focusing on expanding their market share by adopting various key development strategies including mergers and acquisitions, collaborations & strategic partnerships, as well as developing new and enhanced products in order to strengthen their product portfolios and geographical presence, while attracting new customers. The key players in the global rugged phones market are:

Samsung Electronics Co., Ltd.  
Zebra Technologies Corporation  
Kyocera Corporation  
HMD Global Oy  
Unitech Electronics Co., Ltd.  
Sonim Technologies, Inc.  
Blackview SA  
Juniper Systems, Inc.  
Bullitt Group Ltd. (Cat Phone)  
Oukitel  
AGM Mobile  
Doogee

With these strategies rugged phone companies cater increasing demand, ensure competitive effectiveness, develop innovative products & technologies, reduce production costs, and expand their customer base. For instance, in February 2023, Kyocera International Inc., added the DuraXV Extreme+ flip phone without a camera to its lineup of military-grade rugged device portfolio along with Verizon. Similarly, in September 2022, SAMSUNG launched the Galaxy XCover6 Pro and Galaxy Tab Active4 Pro in the US. The aim behind the launch of these devices is to deliver field workers and frontline workers the flexibility to use it during their tough situations.

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