

Worldwide Major Mobile Phone Vendor Performance 3Q 2019

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Abstracts

Global mobile phone market volume grew sequentially but declined year-on-year again in the second quarter of 2019, reaching 431.7 million units. Of the total mobile phones shipped, 346.1 million were smartphones, down 3.6% year-on-year. By regional markets in the second quarter, sales of smartphones in North America and Europe continued to decline while sales of smartphones in China, India, and Southeast Asia managed to grow slightly or stayed relatively the same. The escalating trade war and Huawei ban affected the market demand in the second quarter, traditionally the peak season for Android phones. The rollout plans of phone brands was disrupted, along with the demand in regional markets. For instance, Huawei's shipments to Europe and Japan declined but the company's shipments in China increased due to the public support. But this somewhat affected its Chinese counterparts such as Oppo, Vivo, and Xiaomi. Despite the market has been optimistic about 5G phones in 2020, the market demand however is anticipated to be continued affecting by the US-China trade war as President Trump plans to impose tariffs of 15% on goods in the fourth round of list, including smartphones.

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Research Scope & Definitions

About

The research focuses on mobile phones and does not include low-frequency phones such as cordless phones and PHS (Personal Handy System) phones. Mobile phones can be divided by mobile communications standard and operating system into GSM, GPRS, EDGE, W-CDMA, TD-SCDMA, cdmaOne, cdma2000 1x, and cdma2000 1x EV-DO, iDEN. Operating systems include Android OS, BlackBerry OS, Symbian OS, Windows Phone OS, Linux OS.

This research focuses on the five major mobile phone vendors: LG, Motorola, Nokia, Samsung, and Sony Ericsson (in alphabetical order).

Apple's Foray into Mid-range Market to Threaten the Survival of Existing Players

As second-tier branded vendors are marching into the high-end sector, first-tier vendors are also stepping into the mid-range market where second-tier branded vendors have dwelled. However, it will be a tough game for first-tier branded vendors. First of all, in the M-shaped development trend of smartphone product specs, the mid-range sector has been constantly eroded by the high-end and value-line sectors. Next, products with high-end specs at entry-level prices are commonly seen in the mid-range sector. Therefore, first-tier vendors entering mid-range sector have to bear the risks of lower profit margins and a possible impact on their established brand image.

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