

Smartphone Market in India (2018-2023)

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Abstracts

Consumer preference towards mobile devices is changing, and the young generation these days tend to replace television with smartphones. This is proving to be conducive for the growth of the smartphone market in India. With a 14% yearly market growth since 2016, India is the fastest growing smartphone market globally.

Market insights:

Based on volume of shipment, the smartphone market in India is expected to expand at a compound annual growth rate (CAGR) of ~14.56% between FY 2018 and FY 2023 to reach a value of 277 Mn units by FY 2023. The Indian government's ambitious 'Make in India' campaign is encouraging domestic and foreign companies to set up production facilities within the country. Besides government incentives, faster than expected rolling out of 4G networks, and availability of ultra-low-end 4G devices are expected to support the adoption of smartphones in India.

Player-wise segment insights:

Among the major players of the Indian smartphone market, Xiaomi holds the largest market share (~29.70%), benefitting from its offline channel distribution and the launch of Redmi Note 5 and Redmi 5A in 2018. Other significant players in the Indian smartphone sector include Samsung Vivo, Oppo, and Transsion, among others.

Premium company wise segment insights:

In the fourth quarter of 2017, Apple was the top premium smartphone company in India with a market share of ~47%. However, by the fourth quarter of 2018, OnePlus acquired the topmost position as the premium smartphone seller in India with a market share of ~36%. OnePlus 6 and OnePlus 6T were the two bestselling premium smartphones in

2018, which experienced the highest adoption rate among the customers. Apple failed to retain its position as the premium smartphone seller with the highest market share due to a downward shift in shipment of its flagship models, iPhone 8 and iPhone X.

Key growth drivers of the market:

E-commerce platforms like Amazon and Flipkart, among others, accounted for ~38% market share of the total smartphone distribution sales in India in 2018. The online distribution model helps companies save a considerable amount of money that would have been spent in building up a physical distribution network. The significant savings that the companies make, with no distributor and retailer margins, usually account for ~6-15% of the total operational cost. As a result, the smartphone companies are able to cut prices by ~INR 3,000-5,000, thereby attracting more consumers.

Key deterrent to the growth of the market:

In 2017, 1.22% of all applications outside of Google Play were termed as potentially harmful applications (PHAs), with Trojans dominating the PHA category. Smartphones are also vulnerable to numerous threats like bluejacking, bluesnarfing, snoopware, and pranking. Such security and privacy concerns develop averseness among a segment of customers toward smartphones.

The rate of adoption of smartphones and tablets in rural India is low largely due to budgetary constraints, and poor adaptability rate of complicated devices. Since ~70% of the total Indian population reside in the rural areas, and lack the necessary knowledge to handle a smartphone, the rate of penetration of smartphones across India is being hampered.

Companies covered:

Apple India Private Limited

Lava International Limited

Lenovo (India) Private Limited

Micromax Informatics Limited

Motorola Solutions India Private Limited

Oppo Mobiles India Private Limited

Samsung India Electronics Private Limited

Sony India Private Limited

Vivo Mobile India Private Limited

Xiaomi Technology India Private Limited

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