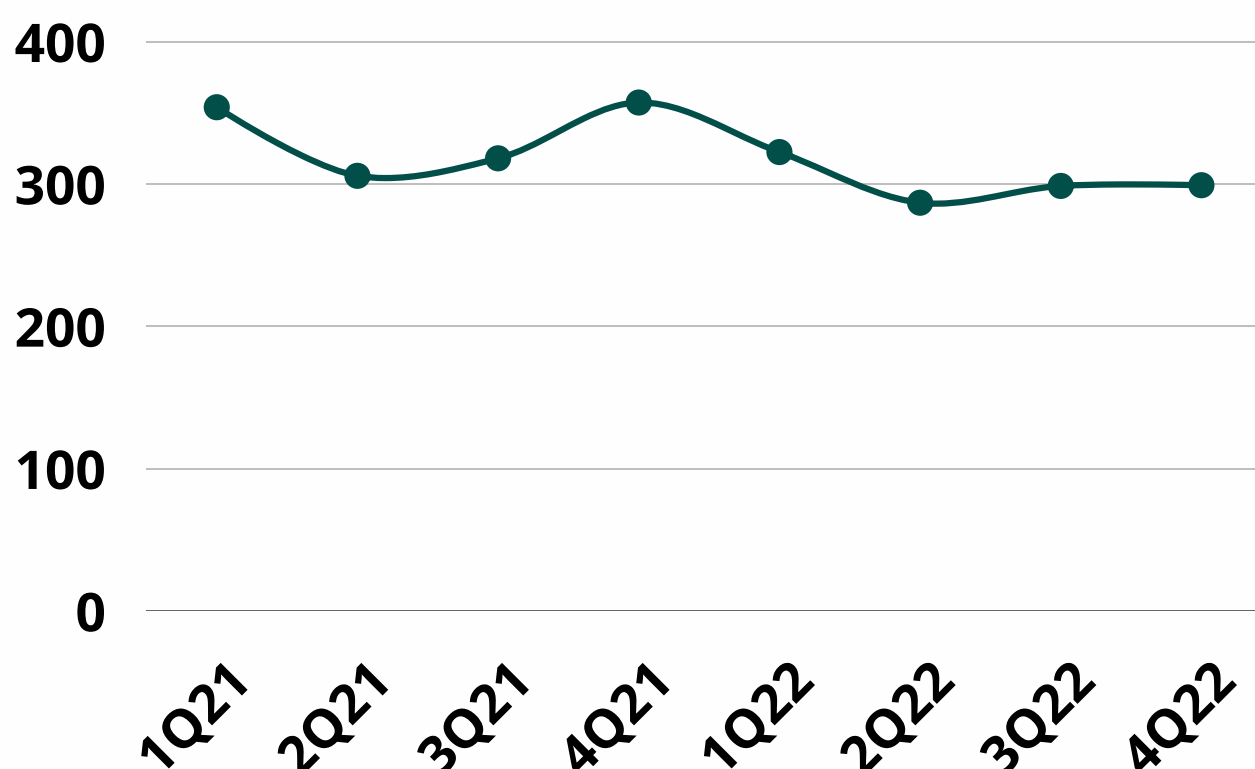


# RECAP OF THE GLOBAL SMARTPHONE MARKET: SHIPMENT FORECASTS, VENDOR UPDATES, 5G SUCCESS, AND REGIONAL PERFORMANCES

Although global smartphone shipments dropped **9.6%** Year-over-Year (YoY) in 2022, the market is expected to see growth of 2.4% in 2023, reaching shipments of **1.24 billion** worldwide. ABI Research forecasts the global smartphone market to grow at a Compound Annual Growth Rate (CAGR) of 1.5% between 2023 and 2028—surpassing **1.3 billion** annual shipments by 2025. Arguably, the market effects of the pandemic are now overshadowed by geopolitical trade wars, macroeconomic headwinds, inflationary pressures, and supply chain issues that are set to become major impediments to the future development of the mobile devices market. However, despite this challenging backdrop, smartphone demand is expected to be counterbalanced by 5G device affordability as a primary growth driver, notably in large fledgling markets, such as India. It will be the industry's ability to strike a positive balance between the impact of disruptors against the gradual return of supply chains, consumer sentiment, and market confidence that will determine the speed of recovery and instigate a longer-term sustainable path.

## Global Smartphone Shipments (Millions)



# How Are Smartphone Vendors Faring?

## Apple



Apple, the market share leader in 4Q 2022 (23.8%), has seen its shipments beat expectations in the past 2 years. This has been buoyed by its recent 5G-supported model releases (SE, 14, etc.).

*Apple had a **23.8%** market share in 4Q 2022*

## Samsung

The Samsung logo, the word 'SAMSUNG' in a bold, blue, sans-serif font, centered within a white rectangular box.

Samsung has seen a seesawing of shipments from quarter to quarter over the past year, but is expected to keep relatively flat shipments over the next 18 months as the comparative slump of its high-end models are balanced by continued success in the mid-range, including 5G models.

*Samsung had a **19.4%** market share in 4Q 2022*

# Xiaomi



Xiaomi shipments are expected to continue growing due to increasing share in the key markets of India and China, as well as improving share rapidly in markets beyond Asia, notably in Latin America, Africa, and Western Europe, which is due to its competitive pricing, mainly in 5G.

*Xiaomi had an **11%** market share in 4Q 2022*

# OPPO



OPPO shipment growth is expected to outstrip the market as it moves successfully into areas outside China, notably Europe and the Middle East & Africa, while benefitting from Huawei's decline.

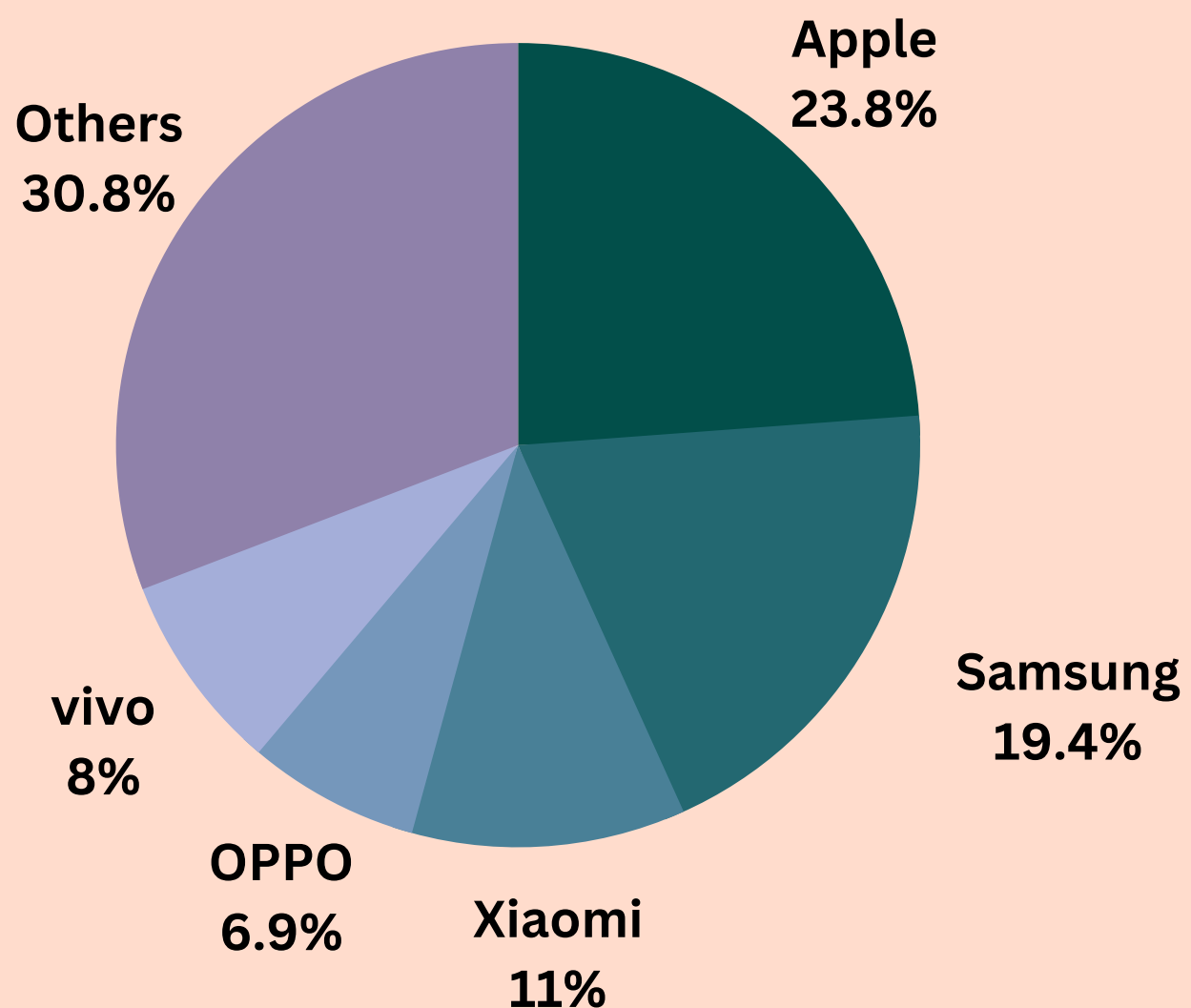
*OPPO had a **6.9%** market share in 4Q 2022*



vivo has both China and India remaining critical markets, and the company has benefitted from the demise of Huawei, but it has also been hit by the slowdown in its home market in 2022.

*vivo had an **8%** market share in 4Q 2022*

## Global Smartphone Market Shares (4Q 2022)



# 5G Smartphone Shipments Doing Well

The 5G smartphone market is outperforming previous cellular generations on nearly every metric, becoming the most accelerated mobile technology generation ever. Its share of total smartphone shipments more than doubled from 20.7% in 2020 to 44.8% in 2021, and rose to 62% in 2022, driven by the availability of 5G models from all major brands across the price tiers.

Vendors' success with 5G smartphones is partially credited to the negligent effect that COVID-19 had on 5G supply chains. 5G smartphone models have become more diverse and released at various price points, which helps democratize the 5G experience. Apple's 2022 products (e.g., iPhone SE and iPhone 14) and lower-priced devices are significant 5G growth drivers in the consumer markets, which will be aided further by the continuing availability of more affordable 5G chipsets.

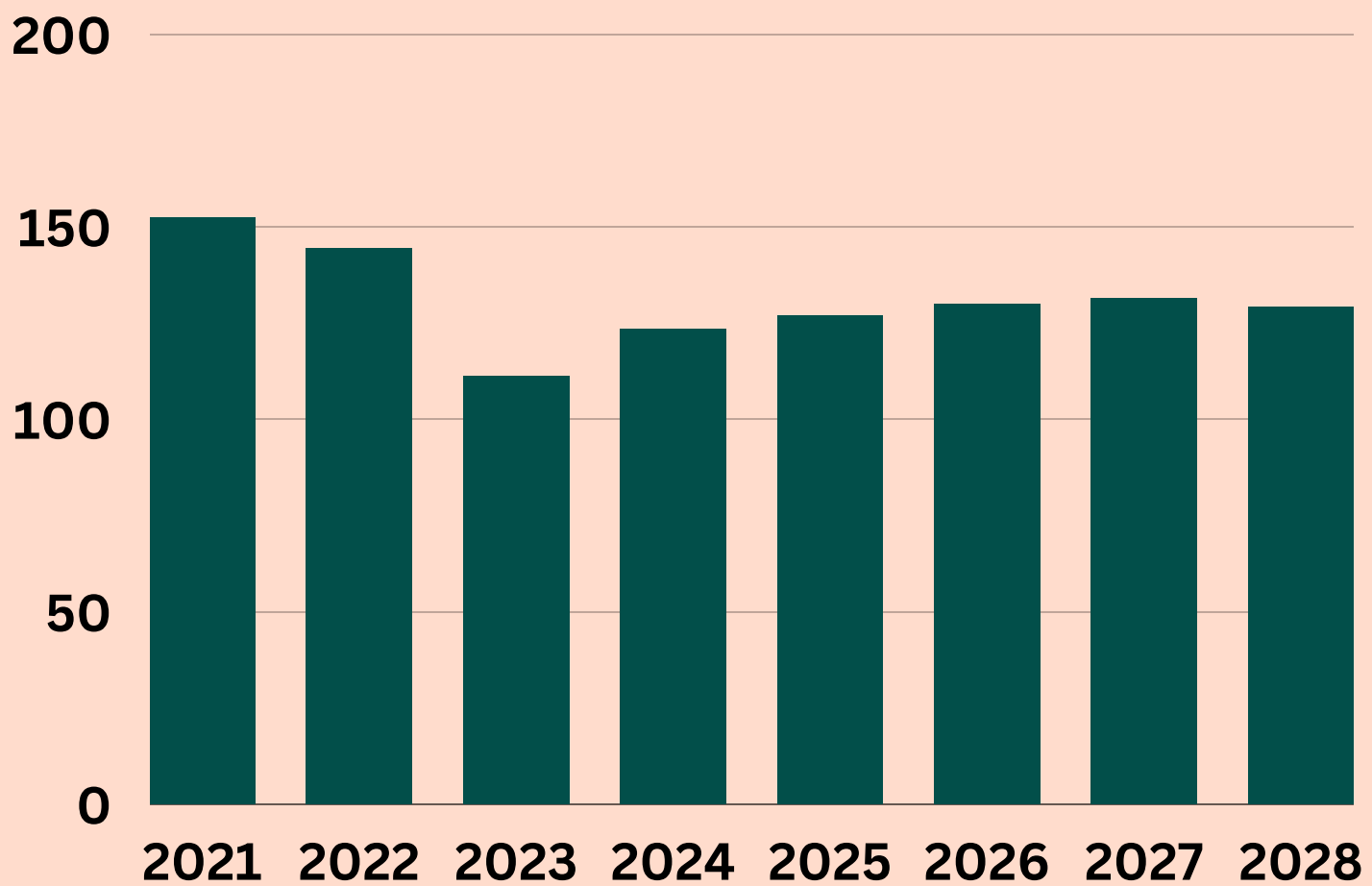
## North America Market Outlook



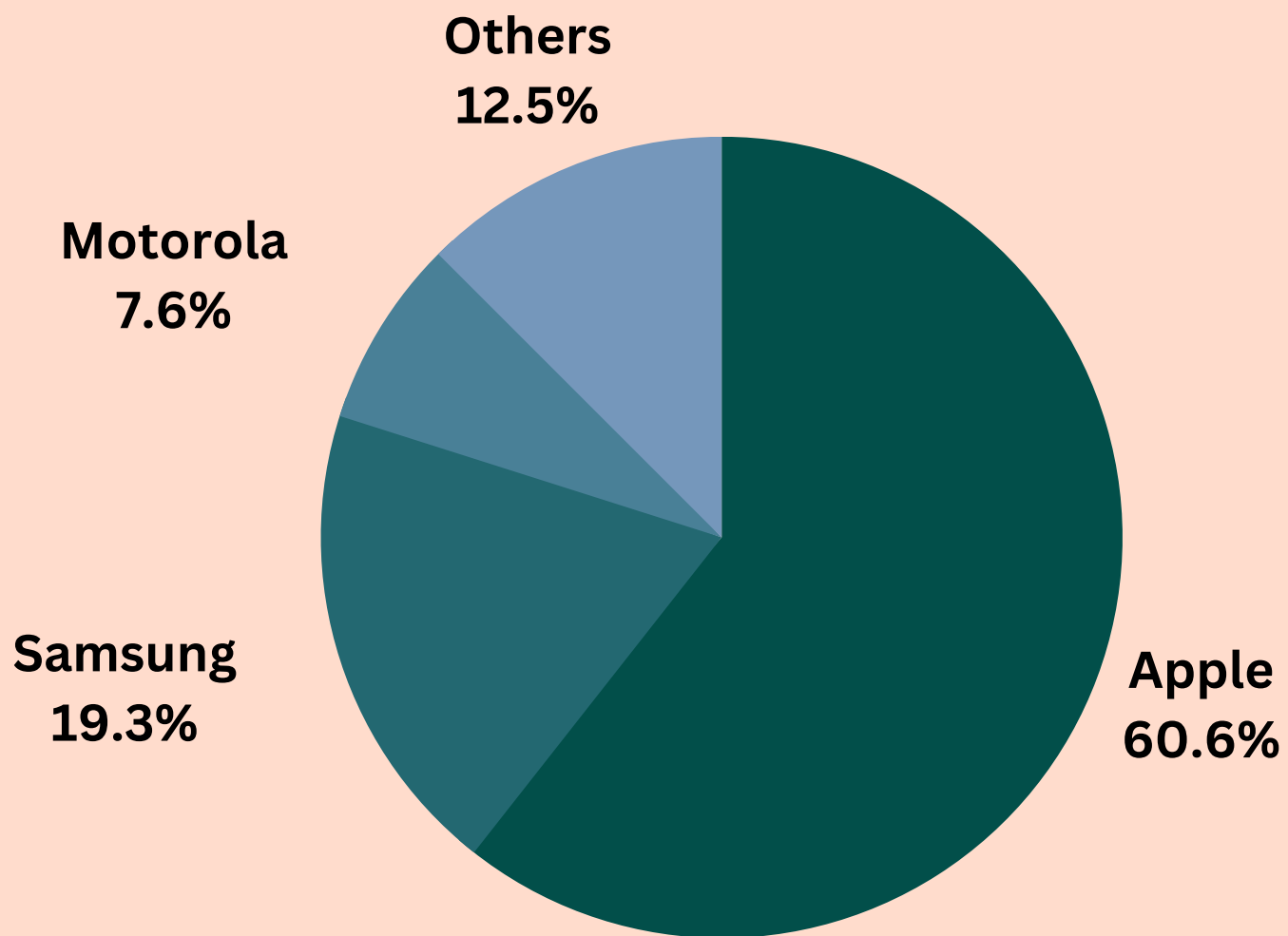
**2021 to 2022:** Smartphone shipments in North America dropped 5.3% YoY between 2021 and 2022—from 152.3 million to 144.3 million.

**2023 to 2028:** Growing at a CAGR of 3%, annual smartphone shipments will increase from 111 million in 2023 to 128.9 million by the end of the forecast window.

## Smartphone Shipments (Millions): North America



## Smartphone Market Shares: North America (4Q 2022)



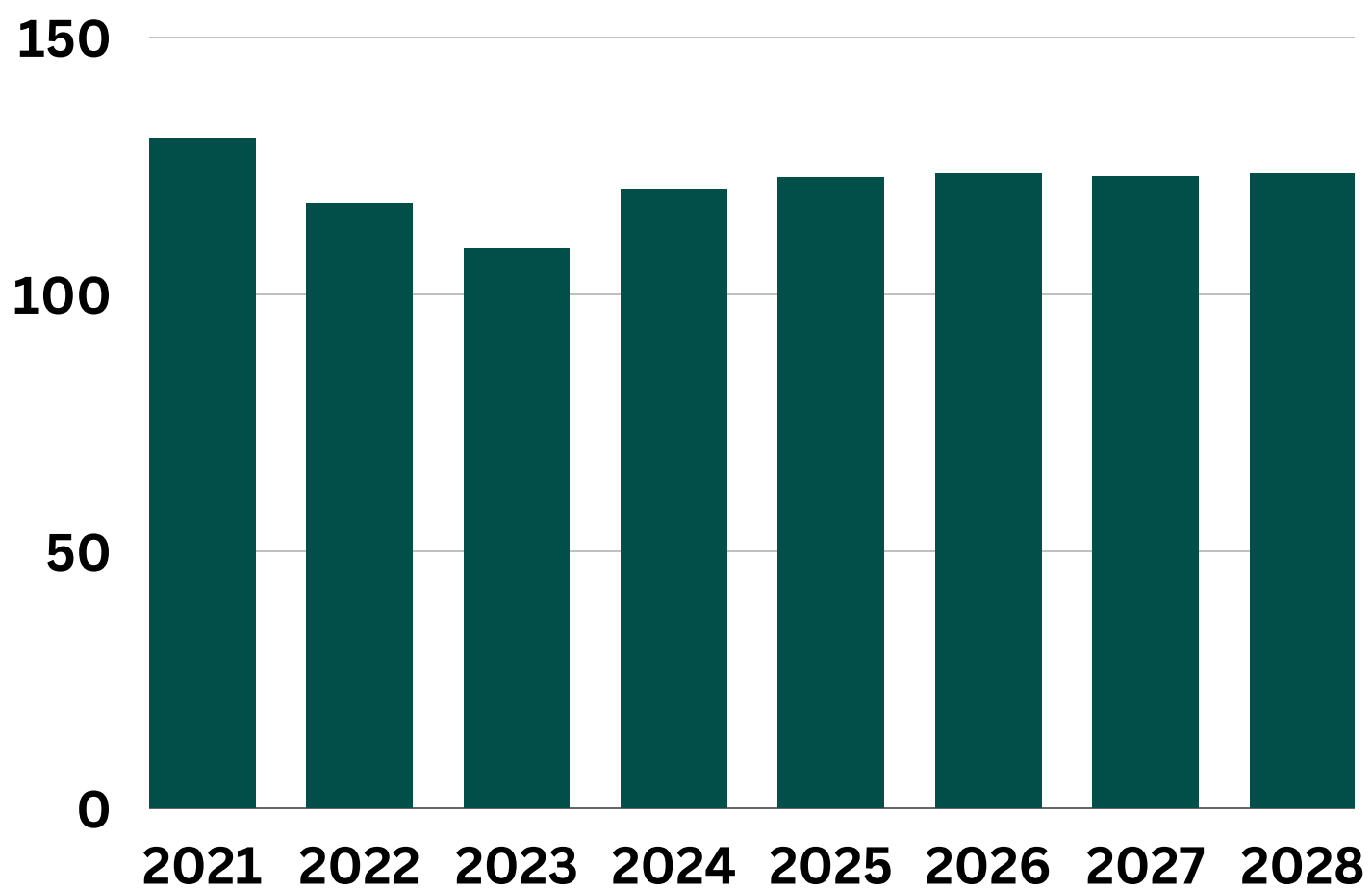
# Western Europe Market Outlook



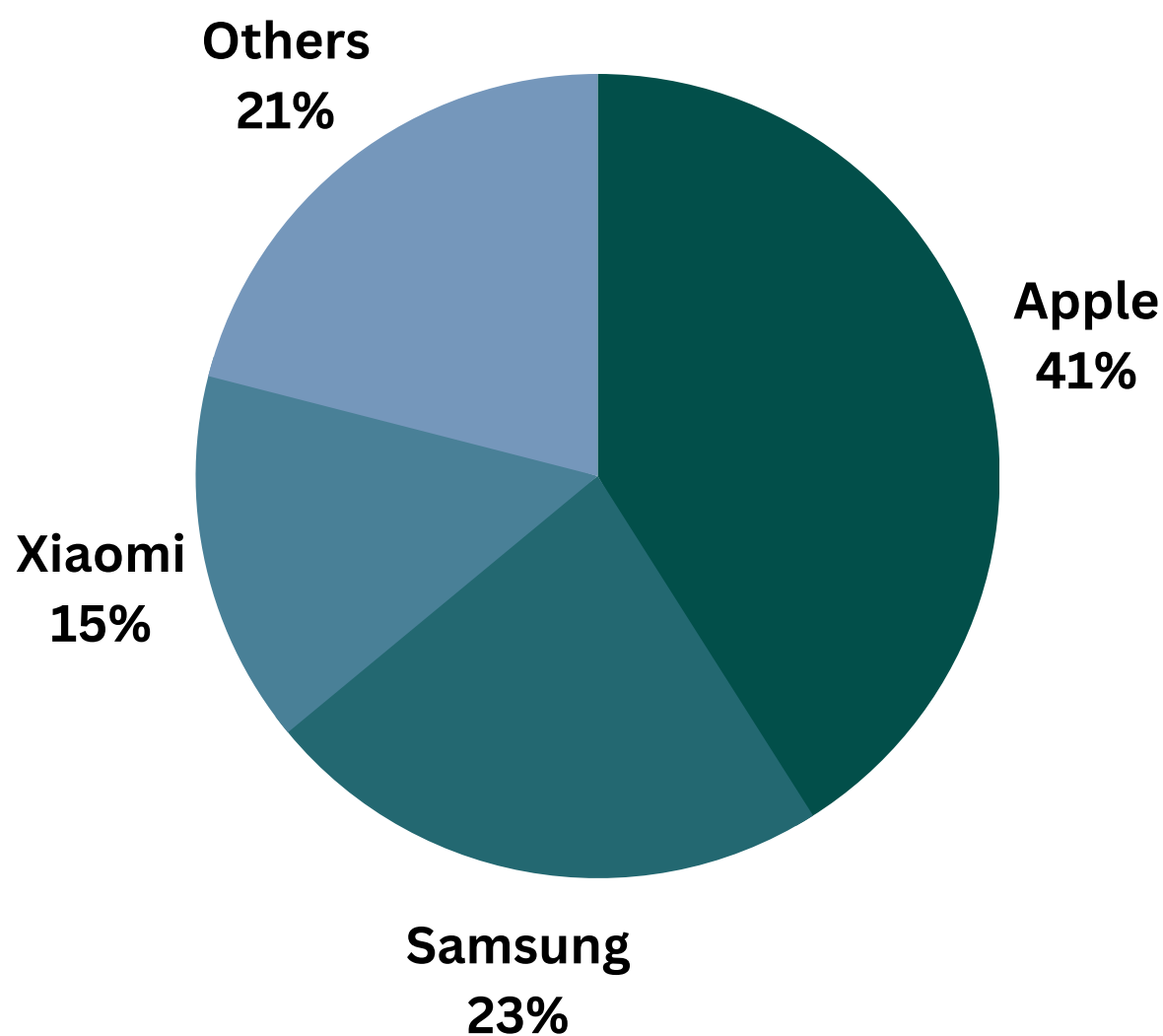
**2021 to 2022:** Smartphone shipments in Western Europe declined 9.8% YoY—from 130.3 million to 117.5 million.

**2023 to 2028:** Growing at a CAGR of 2.6%, annual smartphone shipments will increase modestly from 108.7 million in 2023 to 123.3 million units in 2028.

## Smartphone Shipments (Millions): Western Europe



## Smartphone Market Shares: Western Europe (4Q 2022)



## Eastern Europe Market Outlook

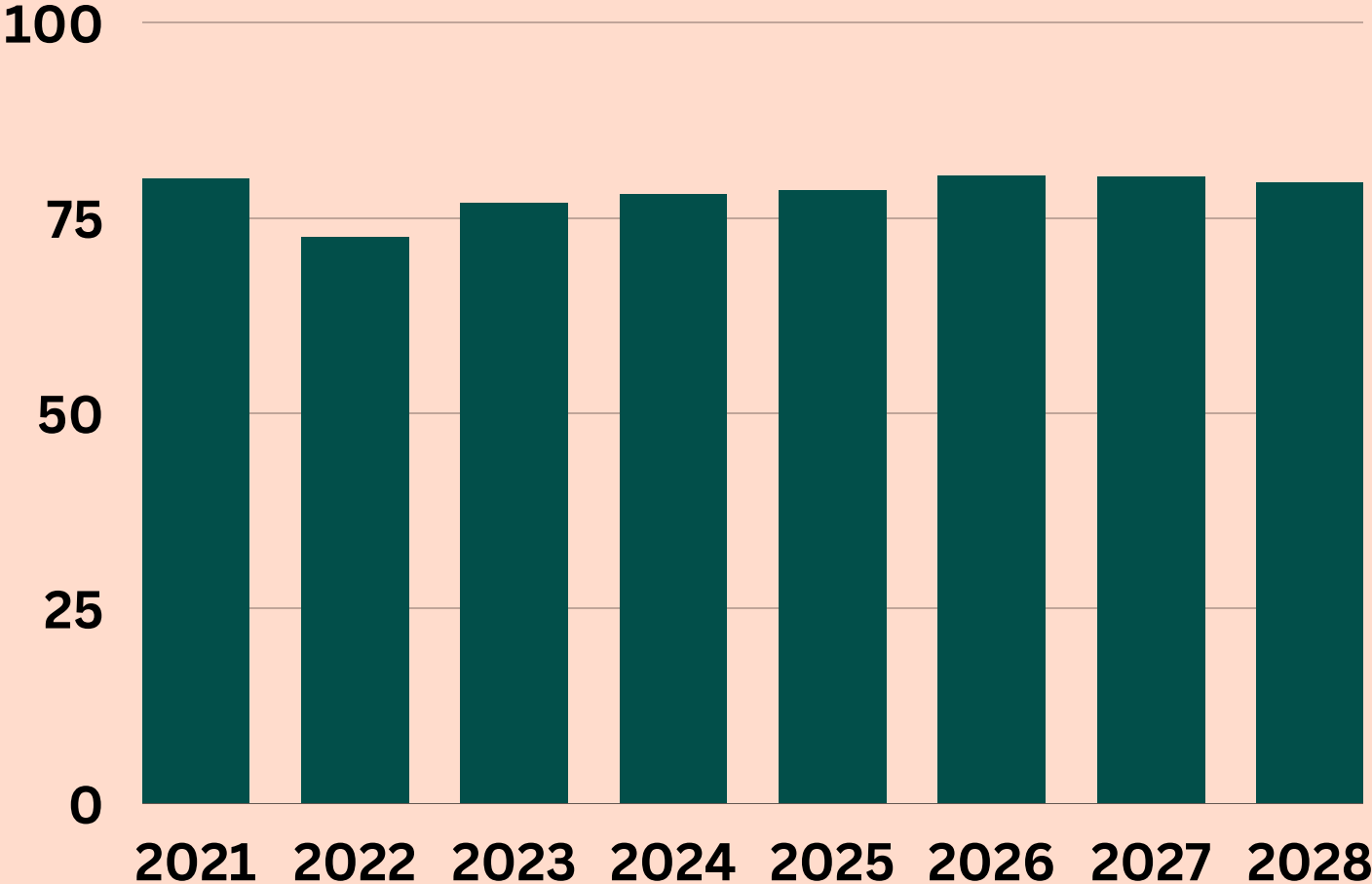


**2021 to 2022:** Smartphone shipments in Eastern Europe dipped 9.3% YoY—from 79.9 million to 72.5 million.

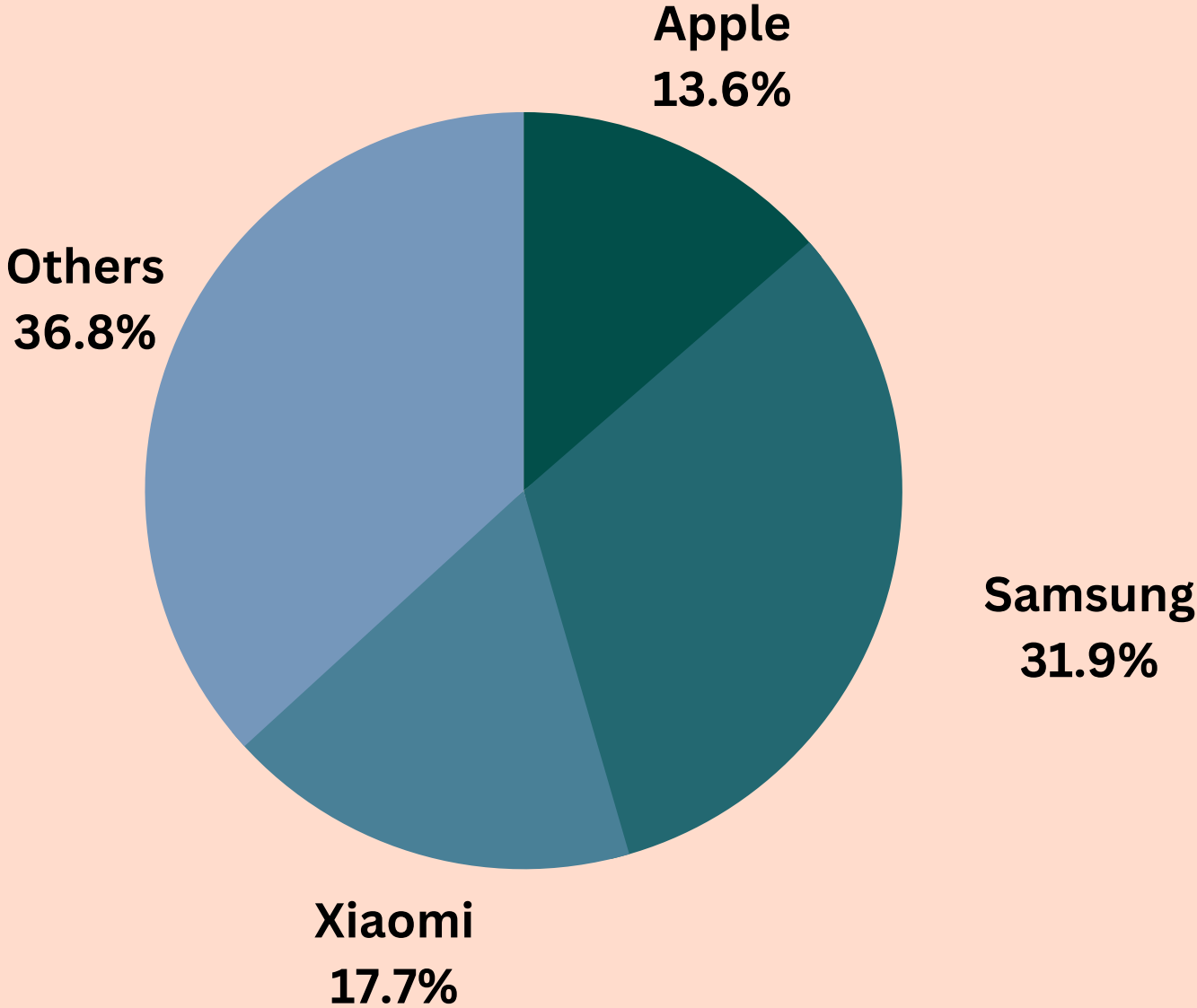
**2023 to 2028:** Growing at a plateau CAGR of 0.7%, annual smartphone shipments will go from 76.8 million in 2023 to 79.5 million by 2028.



# Smartphone Shipments (Millions): Eastern Europe



# Smartphone Market Shares: Eastern Europe (4Q 2022)



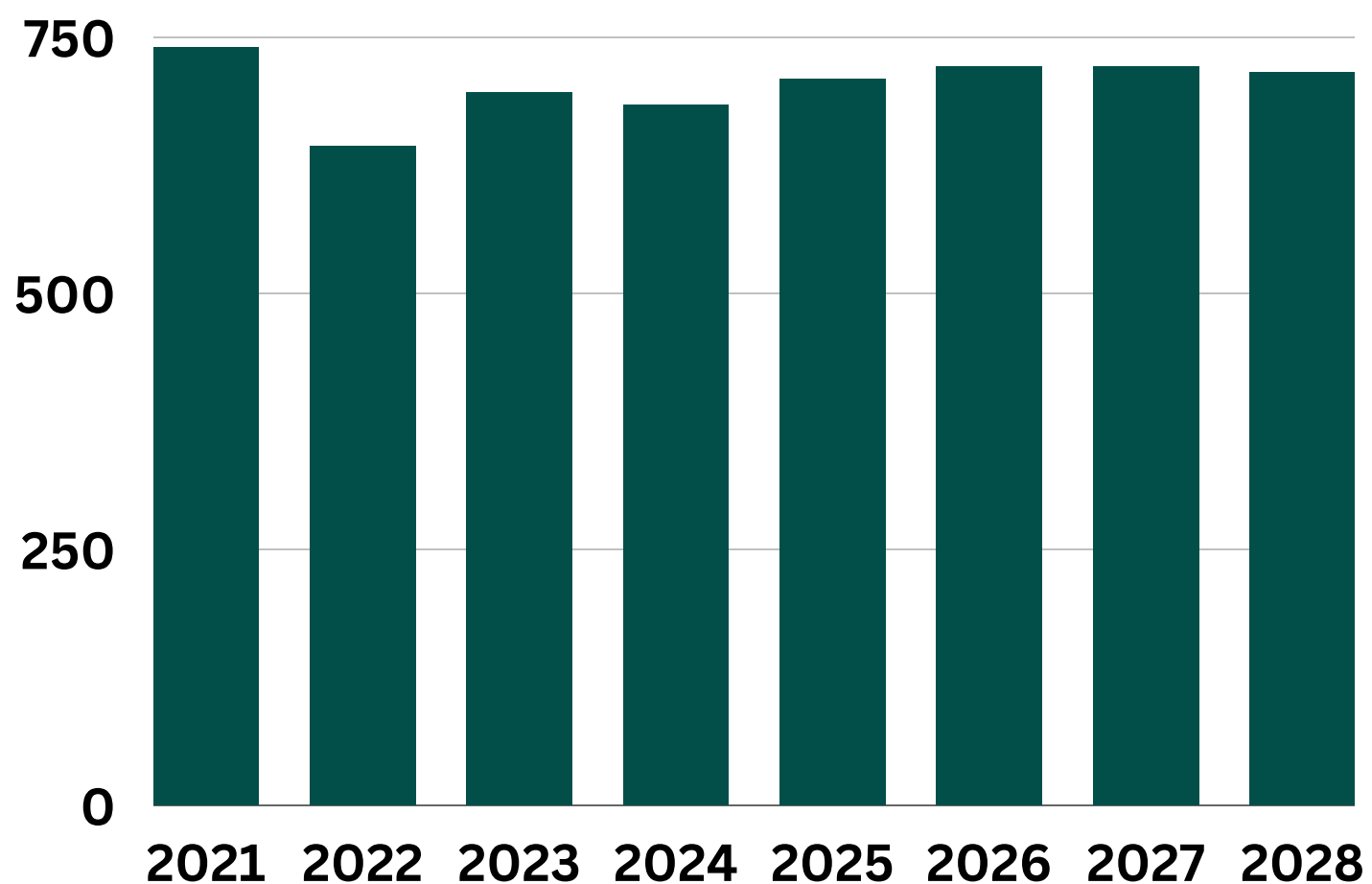
# Asia-Pacific Market Outlook



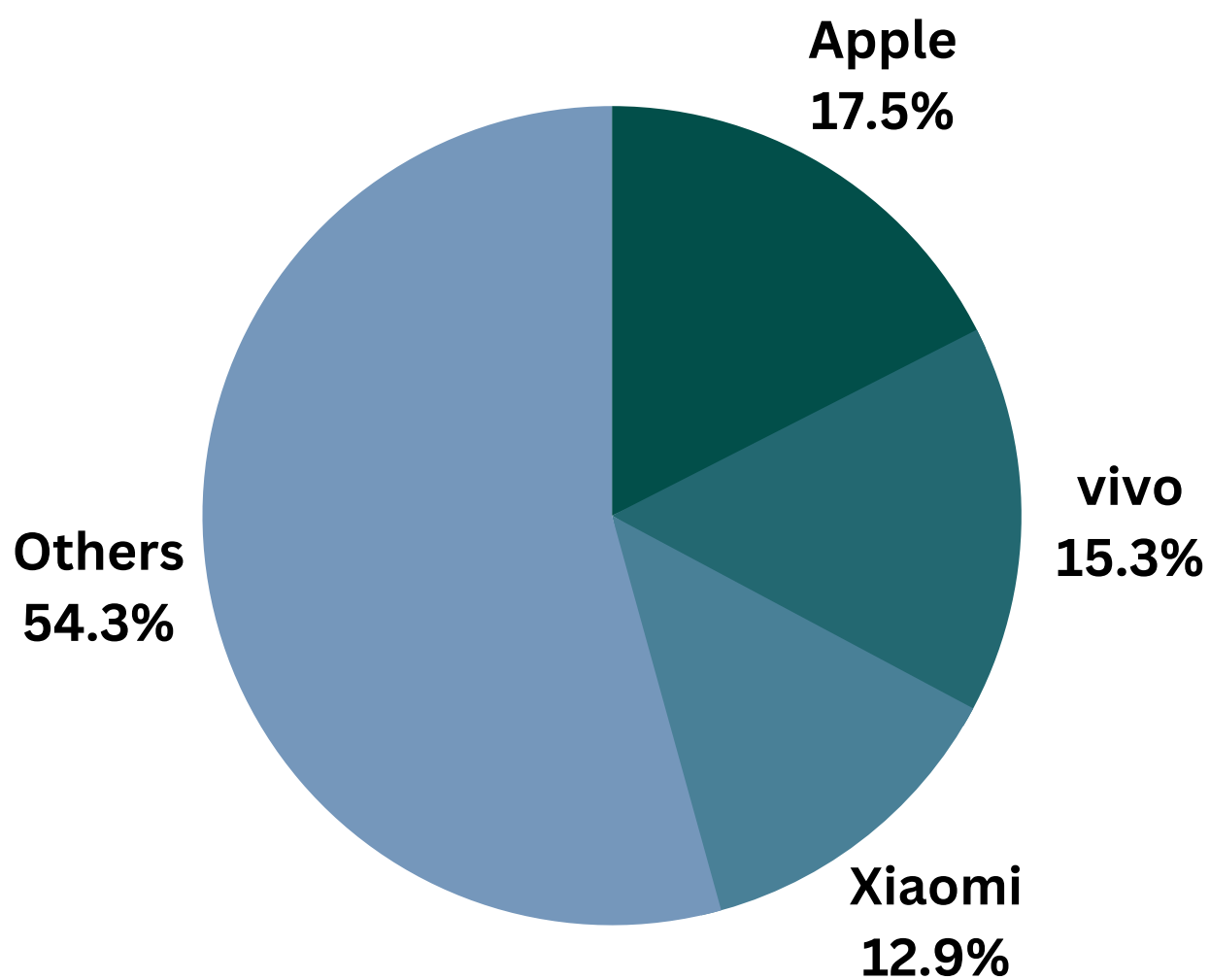
**2021 to 2022:** In Asia-Pacific, smartphone shipments declined by 13.1% YoY—from 739.9 million to 643 million.

**2023 to 2028:** Growing at a CAGR of 0.5%, smartphone shipments will increase from 695.9 million in 2023 to 715.2 million by 2028.

## Smartphone Shipments (Millions): Asia-Pacific



## Smartphone Market Shares: Asia-Pacific (4Q 2022)



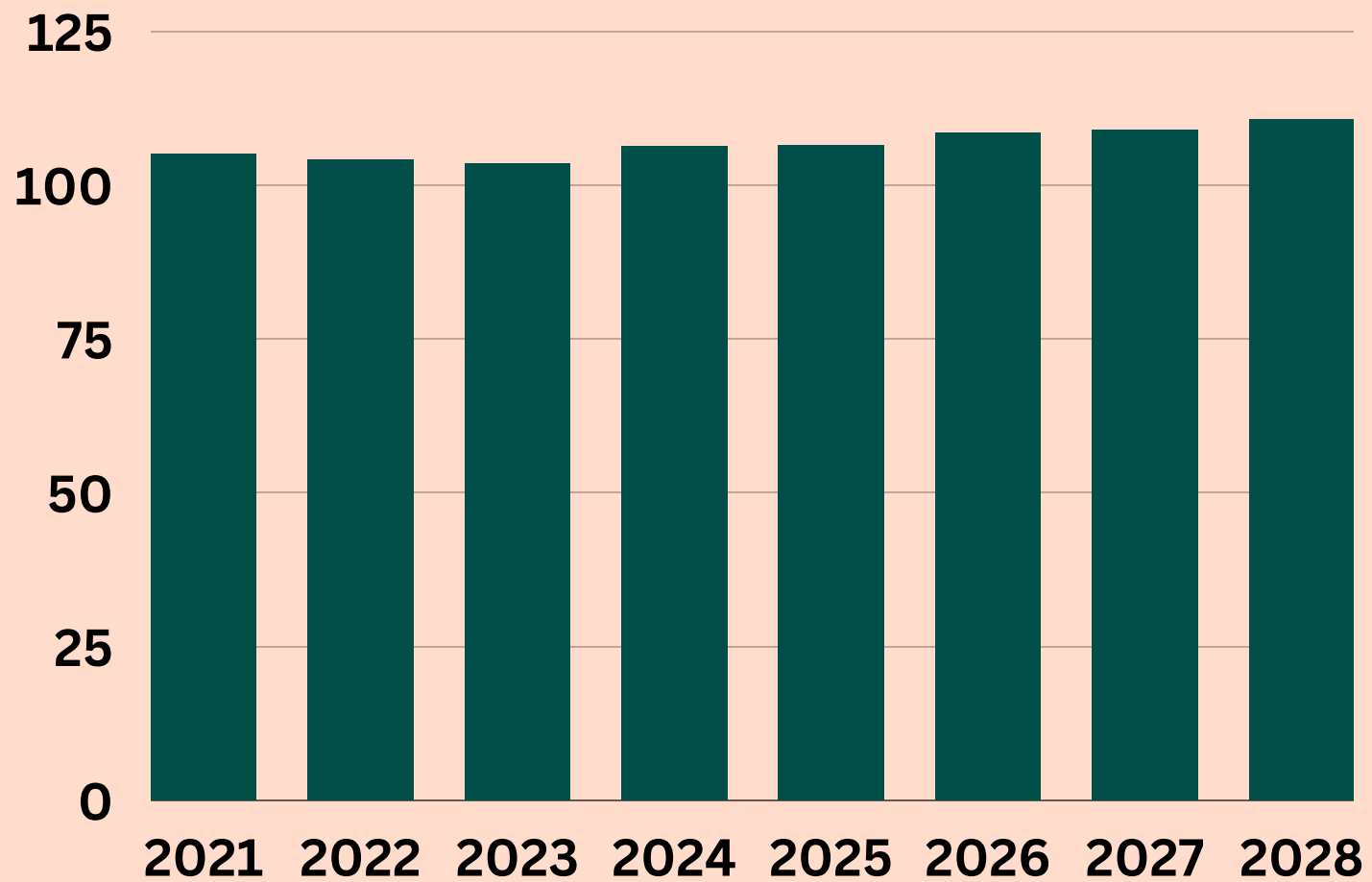
## Latin America Market Outlook



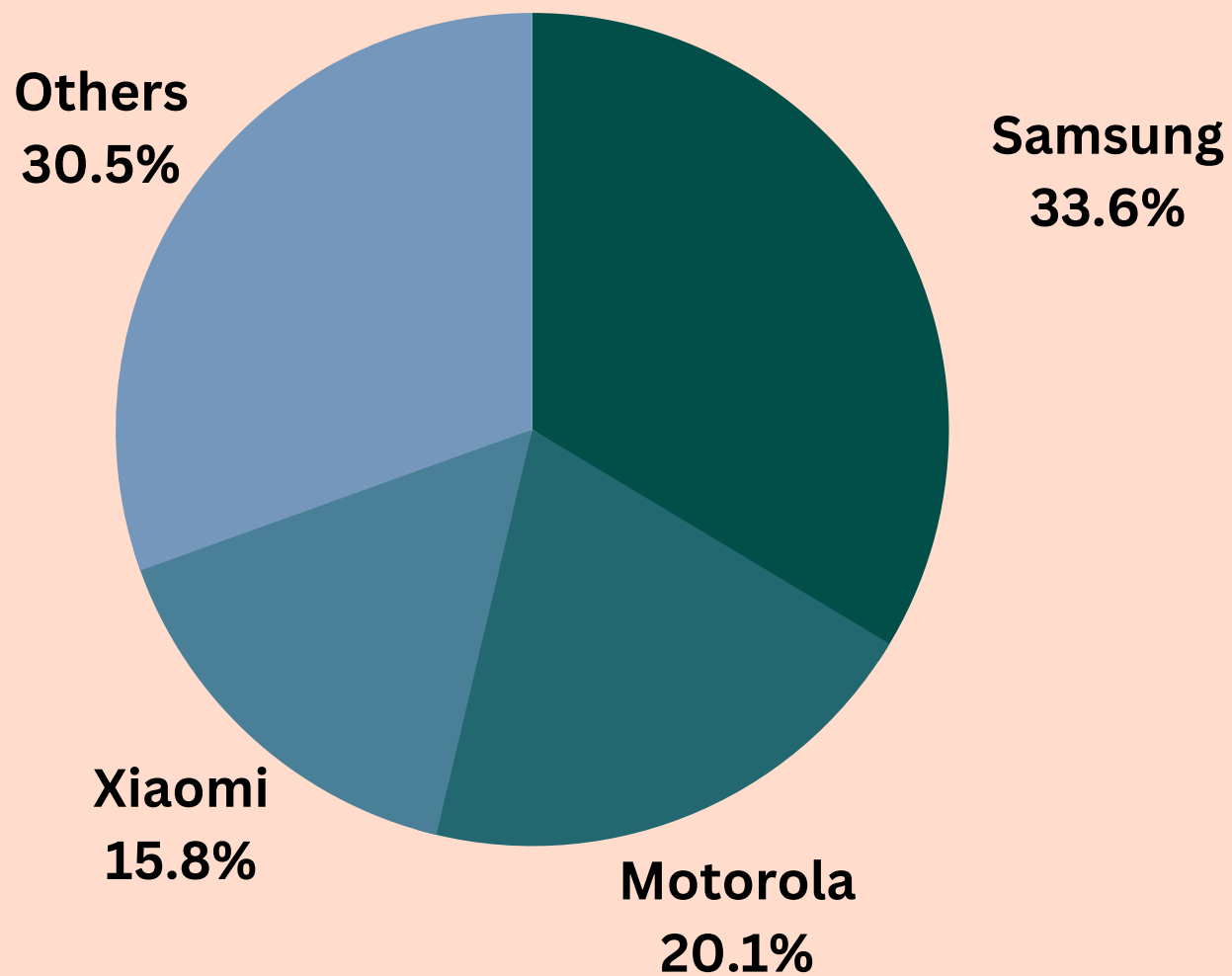
**2021 to 2022:** In Latin America, smartphone shipments were essentially the same in 2022 as in 2021 (0.9% YoY decline)—decreasing slightly from 105 million in 2021 to 104 million in 2022.

**2023 to 2028:** Growing at a CAGR of 1.3%, annual smartphone shipments in Latin America will grow from 103.4 million units in 2023 to 110.6 million units in 2028.

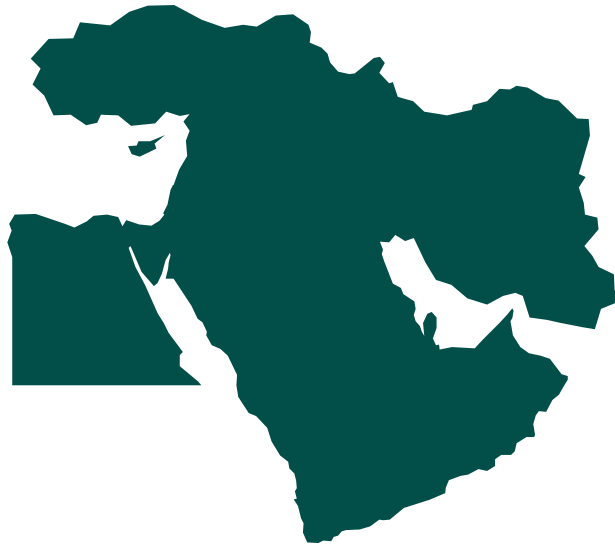
## Smartphone Shipments (Millions): Latin America



## Smartphone Market Shares: Latin America (4Q 2022)



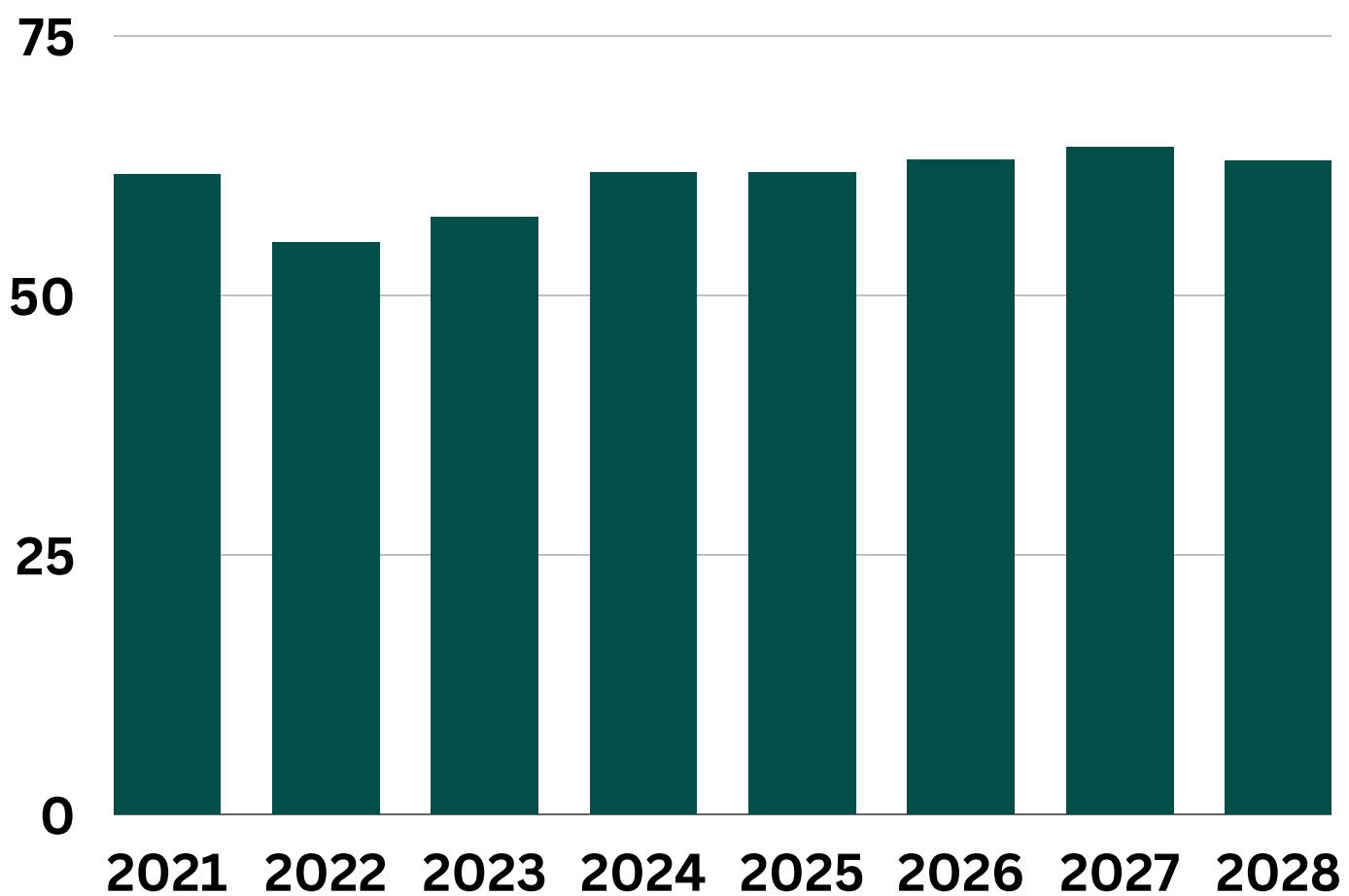
# Middle East Market Outlook



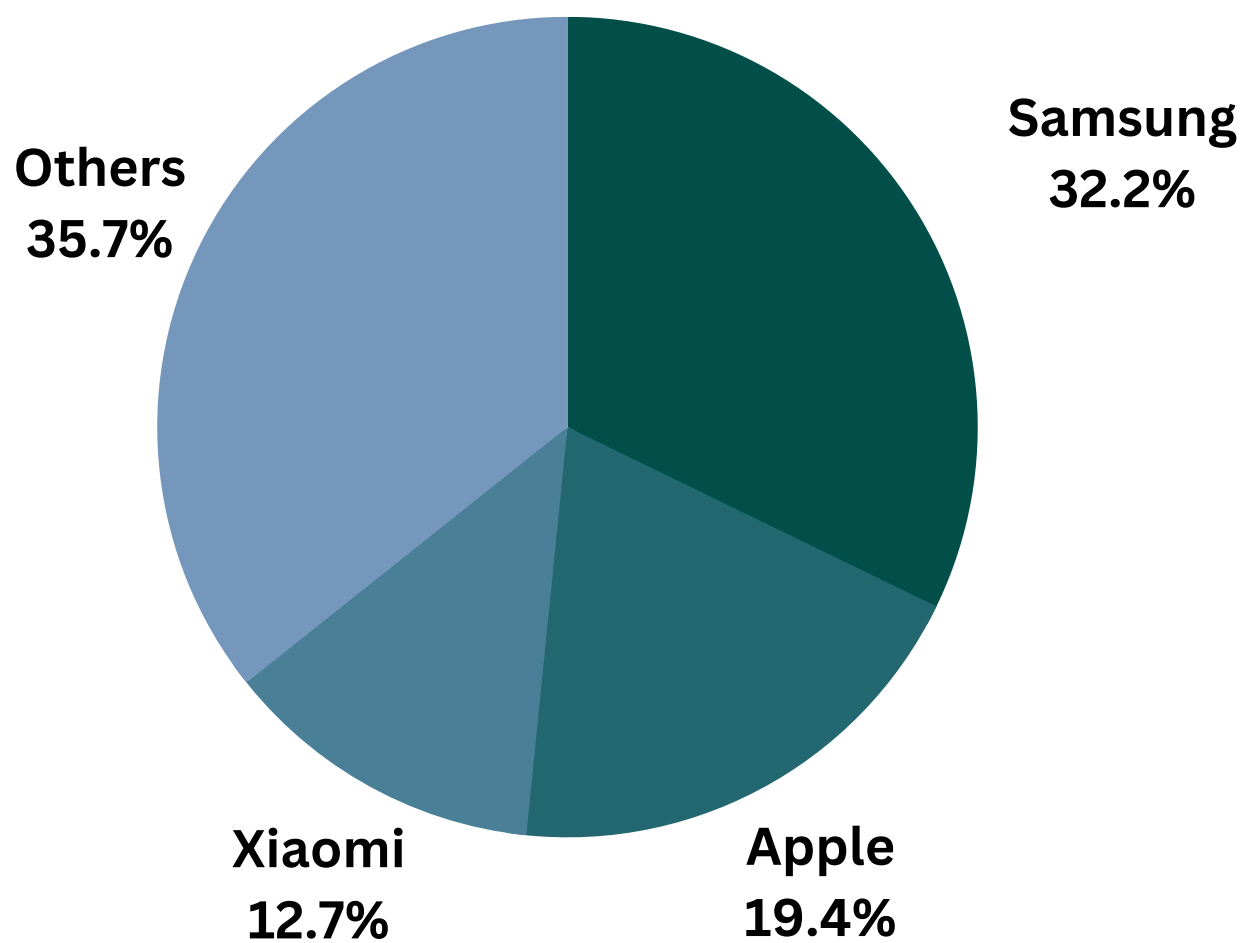
**2021 to 2022:** In the Middle East, smartphone sales dropped 10.7% YoY—from 61.6 million in 2021 to 55 million in 2022.

**2023 to 2028:** Growing at a CAGR of 1.8%, smartphone shipments will increase from 57.5 million units in 2023 to 62.9 million units in 2028.

## Smartphone Shipments (Millions): Middle East



## Smartphone Market Shares: Middle East (4Q 2022)



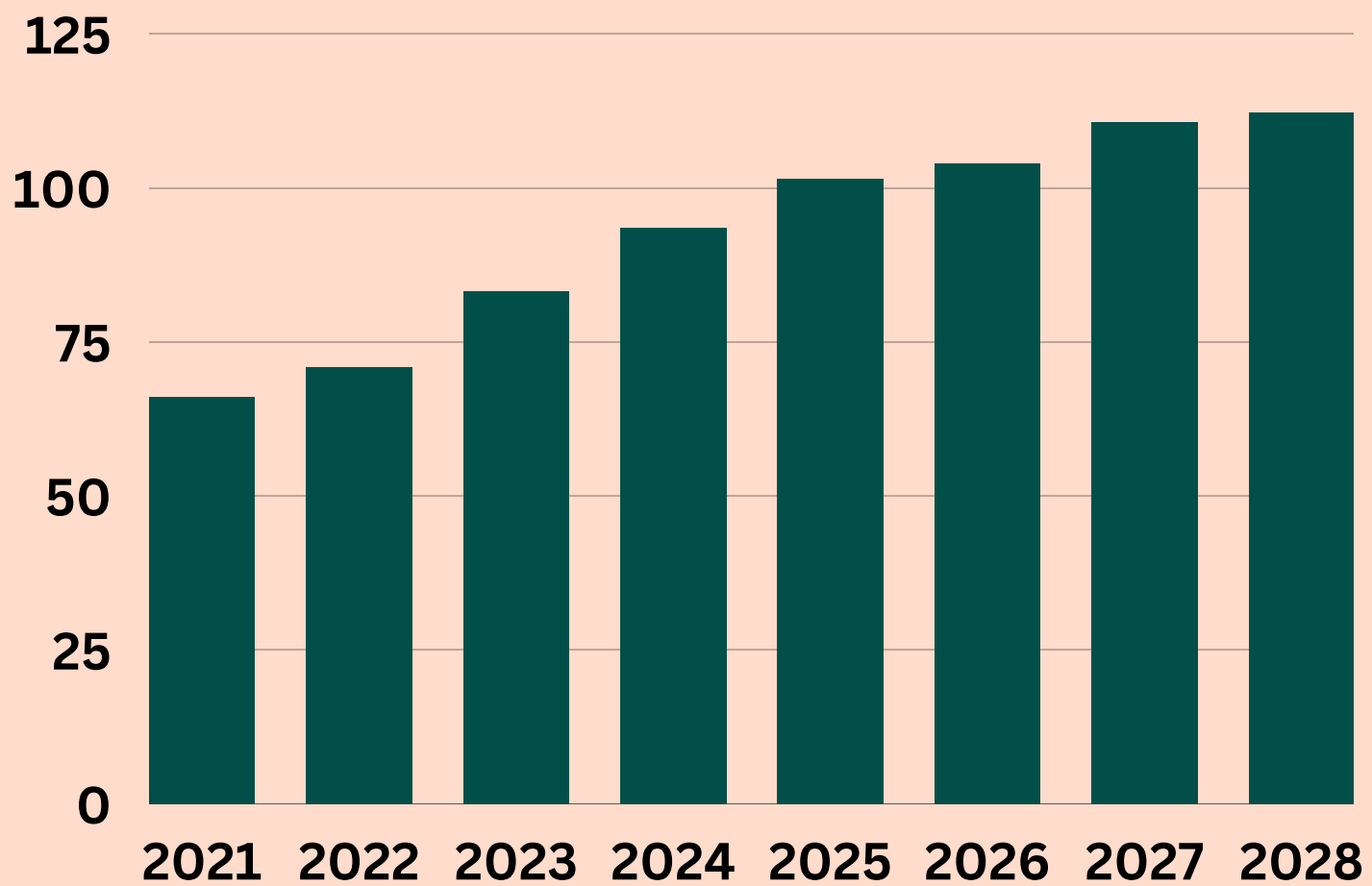
## Africa Market Outlook



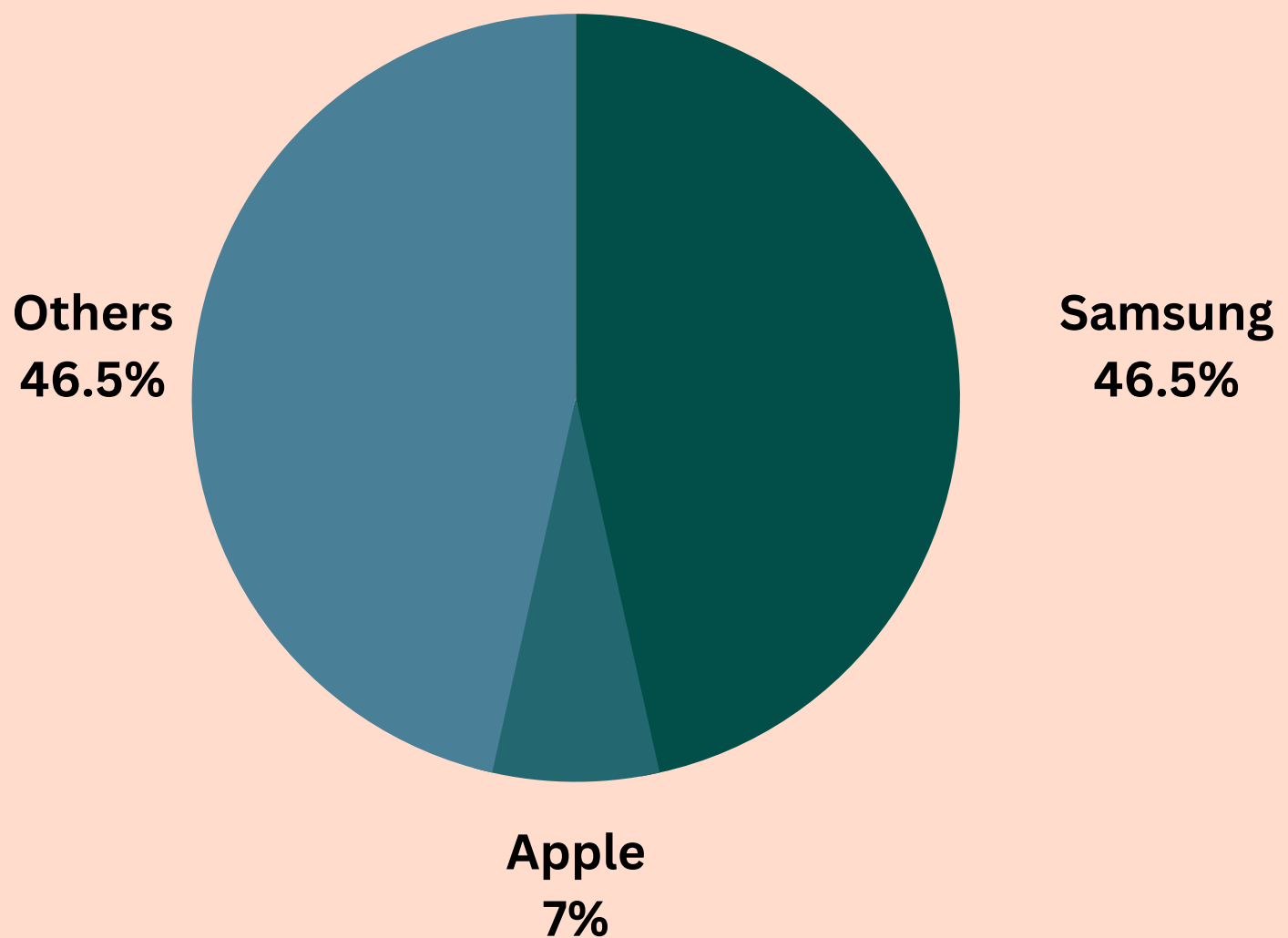
**2021 to 2022:** Africa was an outlier in that annual smartphone shipments increased between 2021 and 2022 (7.2% YoY). That brings shipments from 65.9 million in 2021 to 70.7 million in 2022.

**2023 to 2028:** Africa will experience the fastest smartphone growth rate, growing at a CAGR of 6.2% between 2023 and 2028. Annual shipments will increase from 83.1 million in 2023 to 112.2 million by 2028.

## Smartphone Shipments (Millions): Africa



## Smartphone Market Shares: Africa (4Q 2022)



# Analyzing the Global Smartphone Market

Tracking, forecasting, and examining smartphone shipments is just one facet of ABI Research's 5G Devices, Smartphones & Wearables Research Service. Along with exclusive research and extensive market data, we also provide expert guidance to our clients, helping them identify their challenges, understand their markets, and optimize technology investments and strategies.

To learn more about any of our 5G services, or to discuss your specific needs and challenges with our experts, contact us today.

[Contact Us](#)

## Further Reading

- [5G Mobile Device Vendor Market Shares](#)
- [Mobile and Portable Broadband Device Markets](#)
- [Worldwide Smartphone Market Shares \(2021 to 2022\)](#)
- [5G Silicon Markets and Vendor Shares](#)

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