

Canalys: India's smartphone market grows 13% in Q4 2020, after a tough year

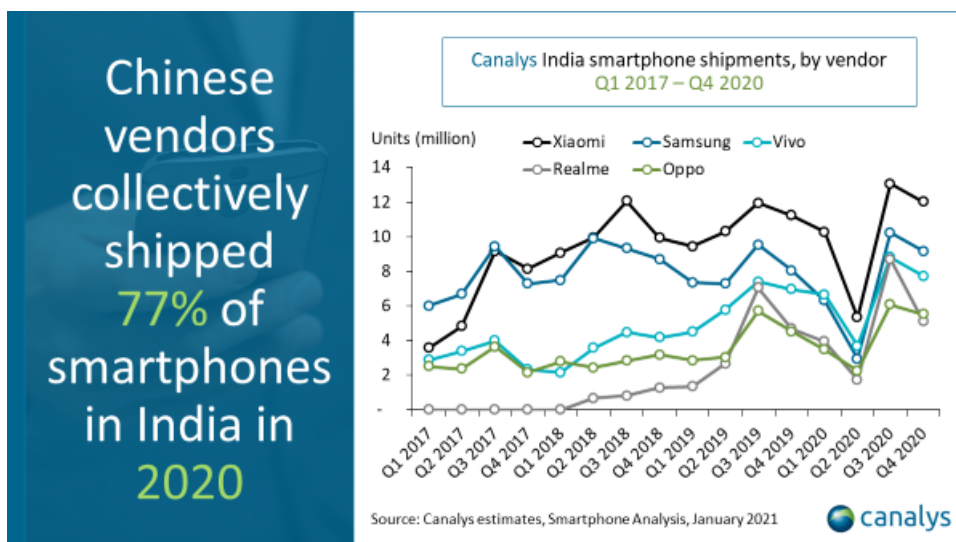
Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 27 January 2021

In India, the smartphone market finished 2020 with nearly 145 million units, a decline of just 2% year-on-year from 148 million units in 2019, after a strong recovery in H2 2020. It marks the second largest smartphone market's first full year decline in history. However, following a record high quarter in Q3 driven by strong sell-in in preparation of holiday promotions, smartphone shipments in India in Q4 were 43.9 million units, a healthy growth of 13% over Q4 2019. Xiaomi shipped 12.0 million units consolidating its lead further to 27% market share. Samsung finished second with 9.2 million shipments growing its market share from 20% in Q3 to 21%. Vivo remained in third place in India, shipping 7.7 million smartphones into the country. Oppo moved up the ranks to fourth place, growing its shipment volume by 23% year-on-year, faster than all others in the top five. Realme came in fifth, shipping 5.1 million units, with 9% annual growth in Q4.

"Smartphone vendors saw sustainable momentum towards recovery in India," said Canalys Research Director Rushabh Doshi. "During 2020, Indian consumer demand has shown incredible resilience towards smartphones, which has given vendors, channel partners and supply chain vendors enough confidence to bump up investments in the market. Along with the ongoing execution of the PLI (Production Linked Incentives) scheme, the looming 5G rollout, as well as new players' entries, we expect a faster recovery for the entire industry in 2021."



“Political headwind between China and India is having little to no impact on the momentum vendors like Xiaomi, Oppo and Vivo gathered in 2020. Chinese vendors collectively contributed to about 77% of total shipments in 2020, against 72% in 2019, with the share likely to continue moving north as the nation prepares itself for the onset of 5G,” commented Canalys Research Analyst, Varun Kannan. “The last power shuffle in India, from Samsung to Xiaomi, occurred when the country made its arduous journey from 3G to 4G. As the nation stands on the brink of a mass-market movement to 5G, Chinese vendors will be ready to capitalize on the shift. All-in-all, the outlook for 2021 will be better than just the nation recovering from COVID-19.”



“As we walk into 2021, India is definitely seeing more opportunities than challenges,” added Doshi. “Several sectors in India, including telecom, consumer technology, pharmacy,

biotechnology, information technology and manufacturing, have emerged stronger post-pandemic, boosting the long-term growth outlook for the country. The pandemic underlined the need for connectivity, with smartphones at the center of people’s lives and livelihoods. On the whole, the market is now poised to adopt newer technology faster than it did before, be it 5G, rollable displays or even connected technology like hearables or wearables. The pandemic has fueled the desire for consumer tech ownership.”

Indian smartphone shipments and annual growth

Canalys Smartphone Market Pulse: Q4 2020

Vendor	Q4 2020 shipments (million)	Q4 2020 Market share	Q4 2019 shipments (million)	Q4 2019 Market share	Annual growth
Xiaomi	12.0	27%	11.2	29%	7%
Samsung	9.2	21%	8.1	21%	13%
Vivo	7.7	18%	7.0	18%	10%
Oppo	5.5	13%	4.5	12%	23%
Realme	5.1	12%	4.7	12%	9%
Others	4.3	10%	3.4	9%	27%
Total	43.9	100%	39.0	100%	13%

Note: Xiaomi estimates include sub-brand POCO. Percentages may not add up to 100% due to rounding

Source: Canalys Smartphone Analysis (sell-in shipments), January 2021

Indian smartphone shipments and annual growth

Canalys Smartphone Market Pulse: full year 2020

Vendor	2020 shipments (million)	2020 Market share	2019 shipments (million)	2019 Market share	Annual growth
Xiaomi	40.7	28%	42.9	29%	-5%
Samsung	28.6	20%	32.2	22%	-11%
Vivo	26.9	19%	24.6	17%	9%
Realme	19.5	13%	15.7	11%	24%
Oppo	17.3	12%	16.1	11%	8%
Others	11.7	8%	16.6	11%	-30%
Total	144.7	100%	148.3	100%	-2%

Note: Xiaomi estimates include sub-brand POCO. Percentages may not add up to 100% due to rounding

Source: Canalys Smartphone Analysis (sell-in shipments), January 2021

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