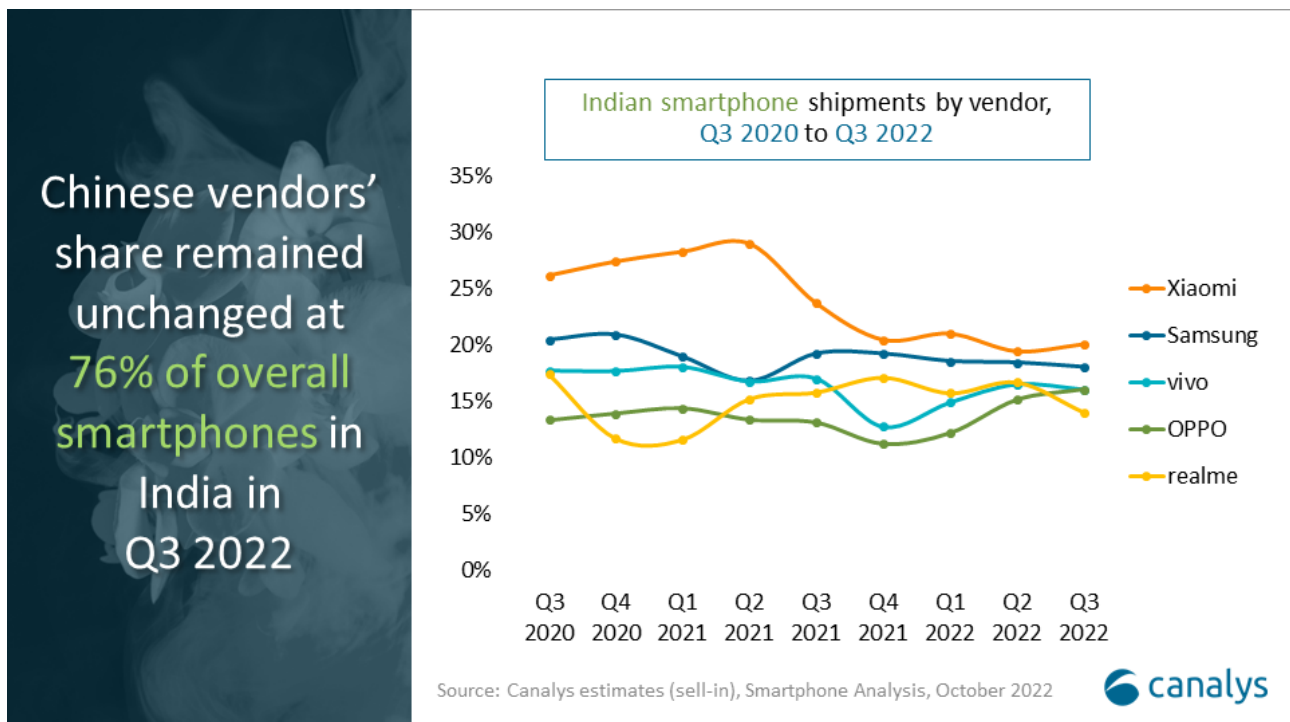


# Indian smartphone shipments fell 6% in Q3 2022 dragged by weak low-end demand

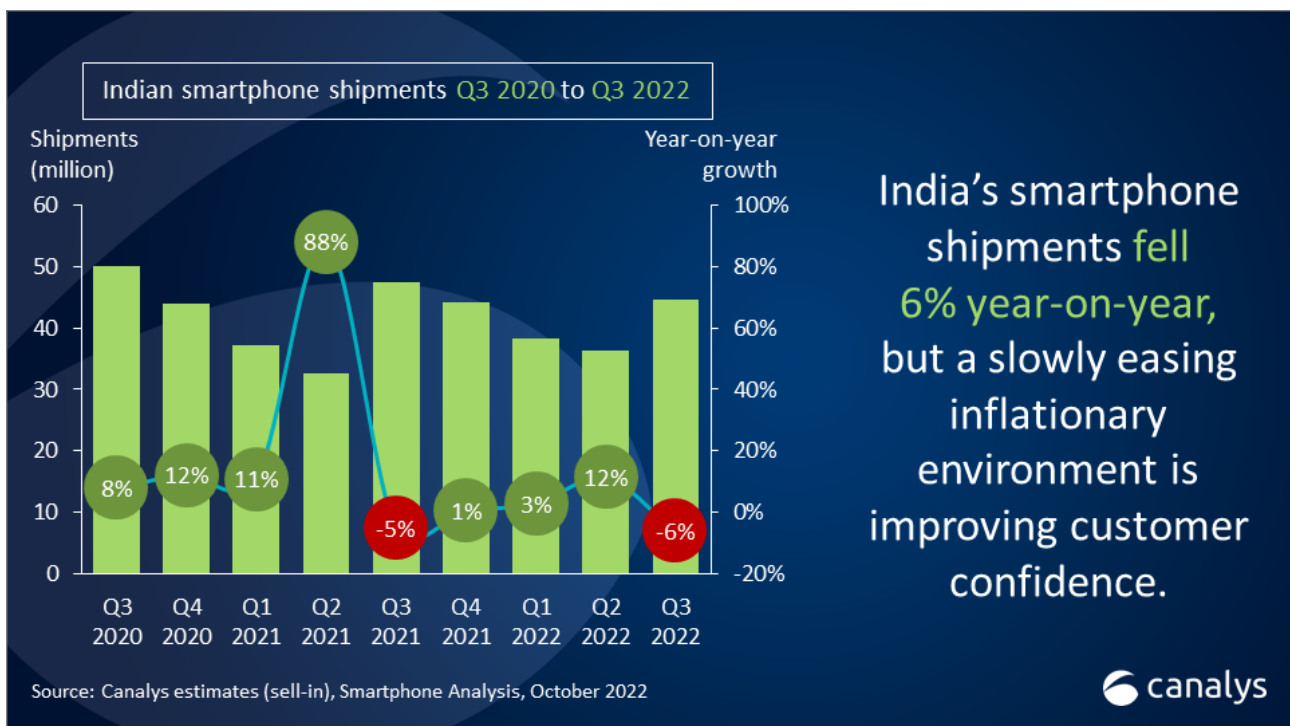
Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 21 October 2022

India’s smartphone shipments in Q3 2022 were 44.6 million units, a 6% decline from the previous year dragged by a lackluster low-end segment. Xiaomi held onto first place with 9.2 million units as the brand gained traction from July’s online sales ahead of the festival season. Samsung came second with 8.1 million shipments and saw strong momentum in the mid-high-end category owing to aggressive offers and promotions. vivo and jumped to third and fourth place, shipping 7.3 million and 7.1 million units respectively, while realme dropped to fifth, shipping 6.2 million.



“Early Monsoon and Independence Day online sales were great opportunities for vendors to clear inventory before heading into the festive season,” said Canalys Analyst Sanyam Chaurasia. “The good news is, as the festival season began, in the last few weeks of the quarter, consumer demand

improved. Hit by inflation, entry-level device contribution declined this year, while the mid-to-high segment performed relatively well thanks to aggressive promotions. OPPO’s OnePlus and vivo’s iQOO were the two brands driving mid-range growth in the e-commerce channel during this period. Ultra-premium category smartphones, especially older generation flagships, also experienced strong demand momentum amid price cuts. Samsung offered deep discounts on its older generation Galaxy Z Fold3 and latest Galaxy S22 series in online and offline channels. Similarly, demand for the aggressively discounted iPhone 13 outstripped the latest iPhone 14, whose value proposition is very similar to the former.”




“5G devices are gaining in popularity, supporting overall device ASP growth and sales revenue,” said Chaurasia. “It is perfect timing for vendors to push their 5G portfolios to smartphone upgraders in the next couple of years, as operators are rolling out 5G services in Tier 1 cities. Entry-level brands are also trying to capitalize on 5G opportunities. Jio and Google are developing the most affordable 5G smartphones to compete with major brands. Although from a cost perspective the ultra-affordable category is unlikely to hit the market in the near term as 5G chipsets are unlikely to decrease in price dramatically.”

“Business activities remained resilient as India's consumer confidence is gradually improving. However, the Indian Rupee has steadily depreciated against the US dollar since June, falling to a record low of INR83.06 on 20 October. Importers will continue to feel the heat from an

operational perspective, especially rising material costs,” continued Chaurasia. “These challenges will persist into Q4, mostly affecting price-sensitive consumers as device ASPs continue to rise. As the mass market segment remains critical to vendors’ overall market share, brands will look for different ways to improve operational and channel efficiency, to minimize increased costs passing to end consumers.”

| <b>Indian smartphone shipments and annual growth</b> |                                    |                             |                                    |                             |                      |
|--|------------------------------------|-----------------------------|------------------------------------|-----------------------------|----------------------|
| <b>Canalys Smartphone Market Pulse: Q3 2022</b>      |                                    |                             |                                    |                             |                      |
| <b>Vendor</b>  | <b>Q3 2022 shipments (million)</b> | <b>Q3 2022 market share</b> | <b>Q3 2021 shipments (million)</b> | <b>Q3 2021 market share</b> | <b>Annual growth</b> |
| <b>Xiaomi</b>  | 9.2                                | 21%                         | 11.2                               | 24%                         | -18%                 |
| <b>Samsung</b>                                       | 8.1                                | 18%                         | 9.1                                | 19%                         | -11%                 |
| <b>vivo</b>  | 7.3                                | 16%                         | 8.1                                | 17%                         | -9%                  |
| <b>OPPO</b>  | 7.1                                | 16%                         | 6.2                                | 13%                         | 14%                  |
| <b>realme</b>  | 6.2                                | 14%                         | 7.5                                | 16%                         | -18%                 |
| <b>Others</b>  | 6.7                                | 15%                         | 5.4                                | 11%                         | 26%                  |
| <b>Total</b>   | <b>44.6</b>                        | <b>100%</b>                 | <b>47.5</b>                        | <b>100%</b>                 | <b>-6%</b>           |

Note: Xiaomi estimates include sub-brand POCO and OPPO includes OnePlus.  
 Percentages may not add up to 100% due to rounding.  
 Source: Canalys Smartphone Analysis (sell-in shipments), October 2022



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