Africa’s Mobile Phone Market Recovery Continues Through Second Quarter of 2021

Johannesburg – Smartphone shipments into Africa grew 13.2% year on year in Q2 2021 to total 22.8 million devices, according to the latest insights from International Data Corporation (IDC). The firm’s Quarterly Global Mobile Phone Tracker shows that feature phone shipments increased 11.8% over the same period to total 26.7 million units. With 54.0% share in Q2 2021, feature phones continue to account for the majority of the African mobile phone market due to their relative affordability and durability.

"After a year of unprecedented market conditions, Africa’s smartphone market is showing signs of recovery from the economic damage inflicted by the COVID-19 pandemic," says Arnold Ponela, a senior research analyst at IDC. "The region's largest smartphone markets each contributed to the overall growth in Q2 2021, with Nigeria (+36.7%), Egypt (+24.6%), and South Africa (+10.5%) all recording strong year-on-year increases in shipments."

Figure 1
Transsion brands (Tecno, Itel, and Infinix) continued to dominate Africa’s smartphone space in Q2 2021, with 47.4% unit share. Samsung and Xiaomi followed in second and third place, with respective unit shares of 19.3% and 9.1%. The Transsion brands (Tecno and Itel) also dominated the feature phone landscape with a combined share of 76.3%. Nokia placed third with 9.8% share of feature phone shipments in Q2 2021.

"The competitive landscape in Africa changed with Huawei out of the top five for the first time in many years, after shipments declined due to the increased weight of U.S. sanctions on the company," says Ponela. "Taking advantage of this situation are the Chinese vendors OPPO and
Xiaomi, which both saw their share of the market increase during the first half of 2021."

In terms of price bands, devices priced below $200 accounted for 84.7% of smartphone shipments to Africa in Q2 2021. The share of smartphones priced below $100 increased from 42.0% in Q1 2021 to 45.0% in Q2 2021, while the share of devices priced $100-$200 decreased from 43.3% to 39.6% over the same period.

"Given the challenging macroeconomic conditions and subsequent increase in smartphone uptake in Africa, it's no surprise that the sub-$100 segment was the clear hero in Q2 2021," says Ramazan Yavuz, a research manager at IDC. "The sub-$100 category is also benefiting from the ongoing decline in feature phone share due to vendors and mobile operators transitioning their product portfolios away from feature phones and toward affordable entry-level smartphones."

Looking ahead, IDC expects Africa's overall mobile phone market to grow 3.2% quarter on quarter in Q3 2021, with overall shipments to increase slightly through 2021, leading to year-on-year growth of 4.5% for the year as a whole. "The African smartphone market is expected to recover as vaccines become more widely available, despite virus mutations
causing secondary lockdowns," says Yavuz. "The markets are now better prepared to handle the situation, with the impact of these secondary lockdowns not as severe as they were first time round."

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