

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q23

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Initiatives: [Technology Market Essentials](#)

Preliminary estimates show that while the mobile phone sales decline is slowing, unit sales for 3Q23 were still down by 8.0% year over year. Consumers deferred smartphone upgrades as the rising cost of living affected their discretionary spending.

What You Need to Know

Gartner's preliminary estimates suggest that worldwide mobile phone sales to end users declined 8.0% in 3Q23 to 306.2 million units, compared with the same quarter from a year ago. Smartphone sales declined 6.7% to 284.4 million units, representing 92.9% of total mobile phones.

Table 1 shows the worldwide quarterly mobile phone sales to end users. Table 2 shows our quarterly mobile phone sales estimates of the top 10 brands globally, along with sales trends compared with the previous year.

Table 1: Quarterly Mobile Phone Sales, Worldwide, 4Q21-3Q23 (Thousands of Units)

(Enlarged table in Appendix)

	4Q21	1Q22	2Q22	3Q22	4Q22	1Q23	2Q23	3Q23 (Estimate)
Smartphones	379,170	341,949	302,867	304,809	319,135	292,285	268,068	284,435
Year-Over-Year Change	-1.8%	-9.9%	-8.2%	-11.4%	-15.8%	-14.5%	-11.5%	-6.7%
All Mobile Phones	412,087	372,754	331,134	332,844	344,110	314,670	292,087	306,173
Year-Over-Year Change	-2.3%	-10.7%	-8.3%	-11.6%	-16.5%	-15.6%	-11.8%	-8.0%
Smartphone Percentage	92.0%	91.7%	91.5%	91.6%	92.7%	92.9%	92.7%	92.9%

Source: Gartner (October 2023)

Table 2: Estimated Top 10 Mobile Phone Brands Globally by Unit Sales to End Users, 3Q23 Versus 3Q22 (Unit Sales in Millions)

(Enlarged table in Appendix)

Rank	Brand	3Q22	3Q23	3Q23 Versus 3Q22
1	Samsung	68.2	59 to 61	Down
2	Apple	50.9	49 to 51	Down
3	Xiaomi	39.3	33 to 35	Down
4	OPPO	25.7	24 to 26	Down
5	Vivo	24.4	20 to 22	Down
6	HONOR	13.6	13 to 14	Down
7	Lenovo	10.7	10 to 11	Down
8	TECNO Mobile	9.6	9.5 to 10.5	Up
9	Huawei	4.5	6 to 7	Up
10	TCL Communication Technology	3.5	3 to 4	Flat

Source: Gartner (October 2023)

Overall Summary — 3Q23

Unit sales for smartphones continued to decline for the ninth consecutive quarter in 3Q23. Consumers continue to defer their discretionary spending due to the rising cost of living and fear of recessions. The third quarter in the year is also usually a leaner period in terms of sales, and often consumers delay purchase decisions for the deals and festive offers that are expected to come during 4Q23. During the quarter, vendors also continued to manage inventory in the expectations for improved sales in 4Q23, and most vendors came out with new device launches to prepare the channels with new model inventory.

Even though unit sales have declined for mobile phones, the trend in average selling prices (ASPs) indicates a move upward in 3Q23, making this the 16th consecutive quarter of year-over-year increase in ASPs. Consumers looking to purchase are prioritizing 5G connectivity, higher specifications and premium branded smartphones when upgrading. The premium smartphone continues to be least impacted among all device types. This buyer behavior — delayed upgrade but willingness to spend more for a better experience — continued to raise mobile phone ASPs.

These early findings are in line with the Gartner forecast that mobile phone unit sales in 3Q23 will be 306.2 million units, declining by 8.2% year over year. This remains in line with our projection for 2023 sales to reach 1.248 billion units per Gartner's 3Q23 update. Through 2024, inventory levels are expected to be normalized for all vendors, and the smartphone market is expected to see growth with recovery in consumer demand.

Asia/Pacific and Japan

The Chinese smartphone market remained down year over year as consumers exhibited caution in their spending during the quarter. This cautious approach was due to uncertainty around the economic situation, characterized by a reduction in exports and weakness in the real estate sector and the overall economy, representing an overall decline in consumer confidence during the quarter. During the quarter, Huawei saw a significant recovery with the new product launch of its Mate 60 series, which helped stimulate consumer demand as the user base for existing Huawei devices is quite large in China. India continues to be a bright spot and performed better than other markets in Asia/Pacific despite sales still being lower year over year. Cautious spending by consumers for devices continued to weaken demand for smartphones. Consumers are also holding out on spending until 4Q23, which accounts for a larger portion of sales in the country due to festive sales. Smartphone vendors responded by introducing more 5G smartphones with high-quality and premium features, preparing the channel with new devices for the upcoming festival sales. Among the vendors, Apple continues to make strides in India, with this quarter marking the first time the iPhone models would be available to purchase on the first day of sales in the country, similar to the U.S., China and Europe.

Our preliminary estimates indicate that overall sales in Asia/Pacific would be down year over year, affected by weak demand in China, as well as many parts of the region facing dampened consumer confidence impacted by inflation, which is pushing buyers to defer their spending on smartphones.

The Americas

While demand in North America remained stable when compared to other regions in 3Q23, it was still weaker when compared to the same period last year. Moderated inflation and economic stability in the region helped revive some of the consumer demand, but this demand was still lower than last year as consumers were willing to upgrade only for meaningful features. New phone launches, such as the Samsung Galaxy foldables and new iPhone, helped generate interest and drive consumers looking to upgrade their existing devices, resulting in better replacement demand.

Mobile phone sales in Latin America were also lower despite a decline in inflation in key markets during 3Q23. Consumers held onto their smartphones in the light of recessionary fears and continued high interest rates in the region.

Our preliminary estimates indicate that overall sales in the Americas would be down slightly year over year, affected by dampened demand and recession fears.

EMEA

Ongoing inflationary pressures and interest rate increases continued to affect consumers in EMEA, causing them to defer purchases. Overall smartphone sales in Western Europe fared better than in the rest of Europe, with Apple and Samsung retaining the top spots in the region on the back of new device releases, but sales were still lower in comparison to 3Q22. Continuous high prices, especially for food and energy, are increasing the cost of living and have a direct impact on consumer spending. This is driving demand for secondhand devices and consumer goods in general. The market for secondhand online sales (all consumer goods) in Germany reached record revenue of 14.8 billion euros in 2022 compared to 8.7 billion euros in 2012 (according to the Institute for Retail Research, IFH Cologne). The market for secondhand and refurbished smartphones is growing rapidly across Europe, particularly in France, Netherlands and Scandinavia.

The demand in Eastern Europe is still far from becoming normal anytime soon due to continued uncertainties around political and economic conditions in the region.

Our preliminary estimates indicate that overall sales in EMEA would be down year over year, affected by weakened consumer demand due to ongoing macroeconomic uncertainties.

Findings: Top-Line Results

Samsung saw quarter-over-quarter growth in its overall smartphone sales in 3Q23. It launched its fifth-generation foldable devices in August (Z Flip 5 and Z Fold 5), with improved features like upgraded chipsets, higher base storage and a bigger, more intuitive outside notification screen in the Flip version. In addition, the S23 series continued to show strong sales, especially the Ultra model, as the market remains consistently favorable toward premium phones this year. Samsung's overall mobile strategy remains in line, with a focus on 5G and flagship devices to maximize revenue under tough demand conditions. In 3Q23, Samsung also launched two devices in the basic segment — M34 5G and F34.

During the quarter, we expect Samsung's overall phone sales to be between 59 million and 61 million units, down year over year, with smartphone sales between 57 million and 59 million units.

Apple launched its next flagship smartphones — the iPhone 15, iPhone 15 Plus, iPhone 15 Pro and iPhone 15 Pro Max — in 3Q23. The flagship lineup now includes the dynamic island in iPhone15 and iPhone15 Plus and a prominent switch from lightning cable to USB-C for all its variants. During the quarter, Apple reaffirmed its commitment toward its sustainability goal for 2030 and added more recycled components and plastic-free packaging in its new iPhones. iPhone 15 Pro phones are designed with titanium to make them lighter than the previous generation of Pro models, with an A17 pro chip to enhance performance and gaming experience to attract the gaming consumer base. Despite the feature updates, Apple saw mixed reception in terms of demand during the quarter from different markets. In China, Apple's second-largest user base, demand for Apple's latest 15 series iPhones declined compared to the previous year, primarily because of Huawei's new Mate 60 series gaining ground and capturing significant share. Meanwhile, in India, which is Apple's fastest-growing market currently, Apple's new model preorder sales showed more demand for the 15 series in the first week compared to last year's flagship.

Overall, iPhone sales were moderated during the quarter, and we expect Apple's iPhone sales to reach 49 million to 51 million in 3Q23, up sequentially, but flat to slightly down year over year.

Xiaomi's smartphone sales have been dropping due to sustained low demand for basic and utility smartphones globally. Xiaomi has been focusing on building AI capabilities in its smartphones, with its goal of building the "Xiaomi LLM" as a light and on-device model. ¹ Xiaomi has been trying to shift from its positioning as an affordable smartphone vendor to more of a premium smartphone company, with an increase in the launches of basic and premium products and a reduction in utility smartphones. Xiaomi launched a new foldable phone, the Xiaomi Mix Fold 3. The Xiaomi 13T, Xiaomi 13T Pro and Redmi K60 Ultra were the new devices launched during this quarter in the premium segment. The Redmi 12 5G, Redmi Note 13, Note 13 Pro, Note 13 Pro+ and Poco M6 Pro were launched in the basic segment. Xiaomi has also been focusing on selling smartphones through offline channels in the Chinese mainland, with 46.6% of premium smartphone units being sold via offline retail stores, according to Xiaomi. ²

We expect Xiaomi's overall mobile phone sales in 3Q23 to reach 33 million to 35 million units, down year over year.

OPPO struggled in the market, falling further sequentially in the face of downward demand conditions across China and international markets. Trying to strategize and leverage the relatively consistent demand for premium smartphones, OPPO launched its flagship OPPO Reno10 and Reno 10 Pro in more international markets. In addition, it also launched its third generation foldable, the Find N3 Flip in 3Q23, which has been received positively by users due to its build quality and intuitive aspect ratios. Even though it is currently only available in China, OPPO plans on giving it an international release in a phased manner starting 4Q23. Balancing its overall portfolio, it also launched some basic smartphones during the quarter, including the Oppo A18, A2 Pro, A38, A58 4G, K11 and A78 4G. Its strategy with the OnePlus brand also remained similar, focusing on premium launches with the OnePlus Ace 2 Pro and Nord 3 and a single basic smartphone launch with the OnePlus NordCE3.

We expect OPPO's mobile phone sales, including that of OnePlus, to reach between 24 to 26 million units in 3Q23, down year over year.

Vivo's smartphone sales declined year over year in 3Q23, as it failed to keep up with its direct competitors like OPPO and Honor in its domestic market in China. In international markets, while Vivo's strategy of having a diverse product portfolio allowed it to cater to a wider audience, especially in emerging markets, it also meant that it lost out on maximizing revenue through sales of its flagship phones. It also had a tough competition in the foldable space due to Samsung and OPPO's foldable launches, which had improved specifications and provided a relatively more seamless experience to the user in their advanced-generation models. During the quarter, Vivo continued to expand its portfolio with models including the Vivo T20 Pro, Y17s, V29 e, Y77t, V29, Y27 and Y20t, most of them catering to the basic segment except the V29 model. Additionally, under the iQOO brand, it launched basic smartphones, including the iQOO Z8x, Z7 Pro, and iQOO Z8, specific to the Chinese market. It further branched out into the premium segment with the iQOO 11S and Neo 7 Pro.

We expect Vivo's phone sales, including iQOO, to be between 20 million and 22 million units in 3Q23, down year over year.

HONOR continued with its efforts to increase its market share in China with aggressive sales promotions and marketing to further its market dominance in the home market. It continues to build on its premium lineup of smartphones and is gaining a foothold in the foldable smartphone market. Outside of the domestic market, HONOR continues to develop its presence in Europe. HONOR has also reentered the Indian smartphone market with the Honor 90 and is planning to start local manufacturing in 2024. During the quarter, HONOR released new foldable phones — the HONOR Magic V2 and HONOR V Purse. HONOR also released the X40 GT Racing in the premium segment and the HONOR X50i, Play 40, X50 and X6a in the basic segment.

We expect HONOR's overall mobile phone sales in 3Q23 to reach 13 million to 14 million units, which is down from the previous year.

Lenovo continues its strategy of focusing on security and software-driven features with devices that offer a quality experience to users seeking stable and enterprise-ready devices. Lenovo has been working on a three-year growth plan for its smartphone business, focusing on building its brand identity and building a complete B2B ecosystem with its Think products. It has increased its investment in the emerging regions to capture more market share. Lenovo has completed the acquisition of FCNT, which will enhance its market position and brand in the Japanese market. ³ The new foldable models have been received well, but Lenovo still faces stiff competition in all markets from Samsung and Apple. Lenovo launched the Motorola Edge 40 Neo in the premium segment and other smartphones such as the Moto G14, Moto G84 and Moto G54 in 3Q23.

We expect Lenovo's smartphone sales to reach 10 million to 11 million units in 3Q23, down year over year.

TECNO Mobile's market expansion is driven by its focus and commitment on innovation and enhancing its product offerings with innovative feature sets at competitive price points. It continues its focus and investments toward camera improvements and features enabling it to add more premium smartphones in its lineup and overcome the limitation of competing only in midtier smartphones where the market is highly commoditized. During the quarter, TECNO announced its first clamshell foldable device, the TECNO Phantom V Flip, which will go on sale in 4Q23. The phone also features an AI voice assistant, EllaGPT, which will be a substitute for Google Assistant for on-device voice prompts and queries. It also launched the refresh for devices in its online-exclusive sub-brand, POVA, with the new launches including the Pova 5, Pova 5 Pro and Pova Neo 3.

Adding to that, TECNO is targeting users moving from feature to smartphone and from utility to basic in markets where penetration of smartphones isn't still low. Therefore, we expect TECNO's overall mobile phone sales in 3Q23 to reach 9.5 million to 10.5 million units, which is up year over year.

Huawei's latest smartphones have seen a revival in its domestic market of China and have been met with enthusiasm, especially with the user base, which was loyal to the brand and had held on to the older Huawei devices during the past years. During the quarter, Huawei made a breakthrough with its new Mate 60 series of models, which leverage the HiSilicon-designed Kirin 9000s chipset enabling them access to 5G wireless speeds. Huawei has now overcome the hardware struggle of access to next-generation technologies that it has had since the sanctions imposed by the U.S. government in 2020. The devices were first launched in Huawei's retail outlets and online store, VMall, before being available in other Chinese e-commerce platforms and third-party retail stores. The timing of release being ahead of the iPhone launch also gave Huawei a lead in the sales before having to compete for market share with the newly launched iPhones. Huawei's product refresh during the quarter includes the Mate 60, 60 Pro, 60 Pro+, 60 RS Ultimate and the foldable Mate X5, all of which run on the Kirin 9000s chipset.

We expect Huawei's overall mobile phone sales to reach 7 million to 8 million units in 3Q23, which is significantly up compared to the same quarter last year.

TCL Communication Technology expands its value-based offerings by bringing more premium features, such as enhanced graphics and processing capabilities combined with AI-assisted camera technologies through its affordable smartphones. In 3Q23, which marks the beginning of the new school year in the U.S., TCL ran back-to-school promotions to offer customers discounts on unlocked mid- and entry-level smartphones through its online sales channels. During the quarter, TCL launched the TCL 40 NxtPaper and NxtPaper 5G, which feature electronic paper-like, eye-comfort displays based on LCDs. Both devices are accompanied with a compatible stylus, T-pen, which mimics the feel of pen on paper when used with the display. The device was available starting September in select markets in Europe and will be available in other markets during 4Q23.

We expect TCL Communication Technology's overall mobile phone sales to reach 3 million to 4 million units in 3Q23, which is flat year over year.

Evidence

¹ Page 12 of [Xiaomi 2Q23 Results Announcement](#). Xiaomi AI Assistant (MAU over 110 million) empowered by a large language model is currently available for invitation testing.

² Page 7 of [Xiaomi 2Q23 Results Announcement](#). In 2Q23, 46.6% of premium smartphone units were sold via offline retail stores. Premium smartphones in the Chinese mainland are smartphones with retail prices at or above 3,000 renminbi.

³ [Lenovo Completes Asset Purchase of FCNT](#), Lenovo.

Document Revision History

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 2Q23 - 26 July 2023

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 1Q23 - 21 April 2023

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q22 - 20 January 2023

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q22 - 26 October 2022

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Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q21 - 21 January 2022

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q21 - 20 October 2021

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 2Q21 - 22 July 2021

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Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q20 - 14 January 2021

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q20 - 20 October 2020

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 2Q20 - 21 July 2020

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 1Q20 - 17 April 2020

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q19 - 14 January 2020

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q19 - 21 October 2019

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Market Share Alert: Preliminary, Mobile Phones, Worldwide, 1Q19 - 12 April 2019

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q18 - 17 January 2019

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q18 - 12 October 2018

Market Share Alert: Preliminary, Mobile Phones, Worldwide, 2Q18 - 12 July 2018

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[Market Share Alert: Preliminary, Mobile Phones, Worldwide, 4Q15 - 15 January 2016](#)

[Market Share Alert: Preliminary, Mobile Phones, Worldwide, 3Q15 - 16 October 2015](#)

[Market Share Alert: Mobile Phones, Worldwide, 2Q15 \(Preliminary View\) - 16 July 2015](#)

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