

IDC中国智能手机市场简报

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- **整体市场概况**



- **国内市场竞争**

- 高端市场

- **海外市场竞争**

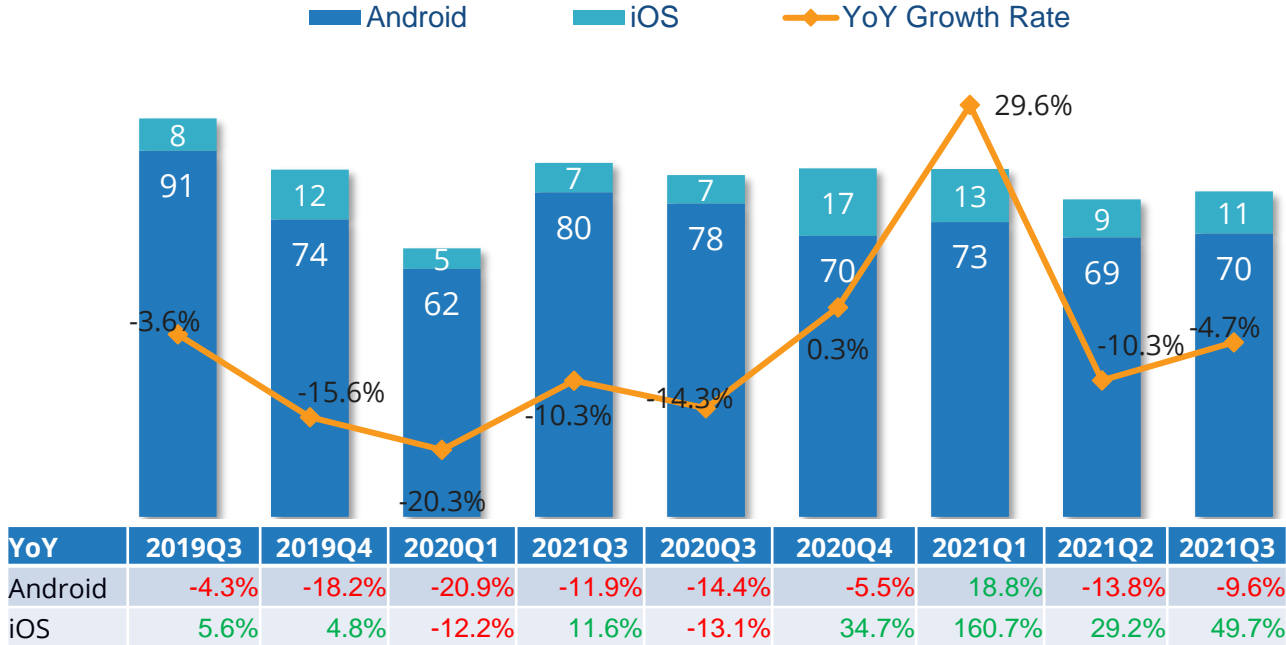
- 高端市场

- **折叠屏**

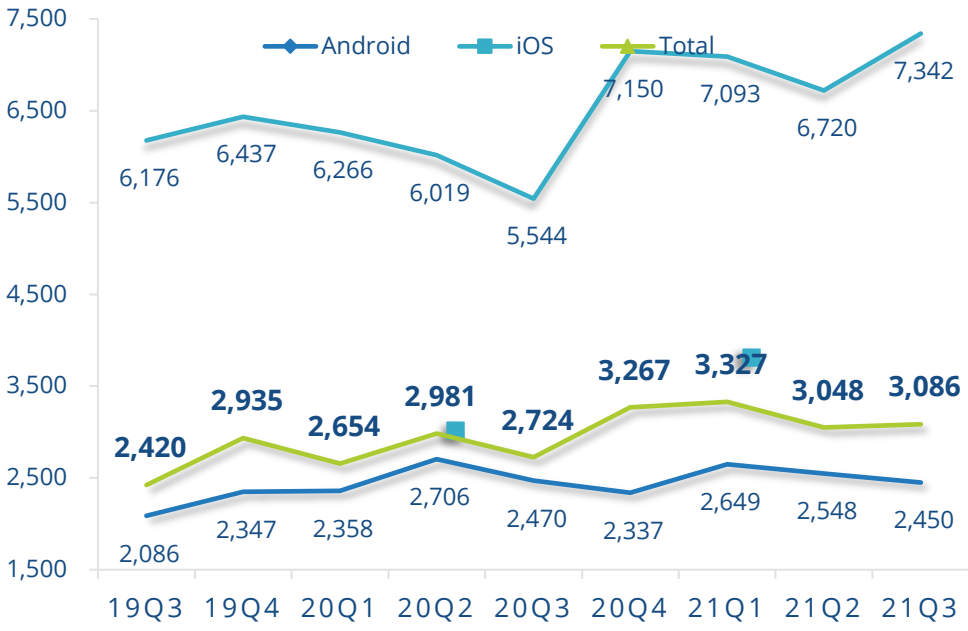
Apple连续高速增长，带动大盘降幅略有收窄，安卓平均单价开始下滑

- ❑ 安卓阵营OPPO，Xiaomi，Huawei，OnePlus拉动平均单价环比下滑。
- ❑ iPhone 13系列Pro、Max版本占比相比去年同期更高，“低价策略”也促进了更高版本市场表现。

China Smartphone Shipments (Unit: Million)



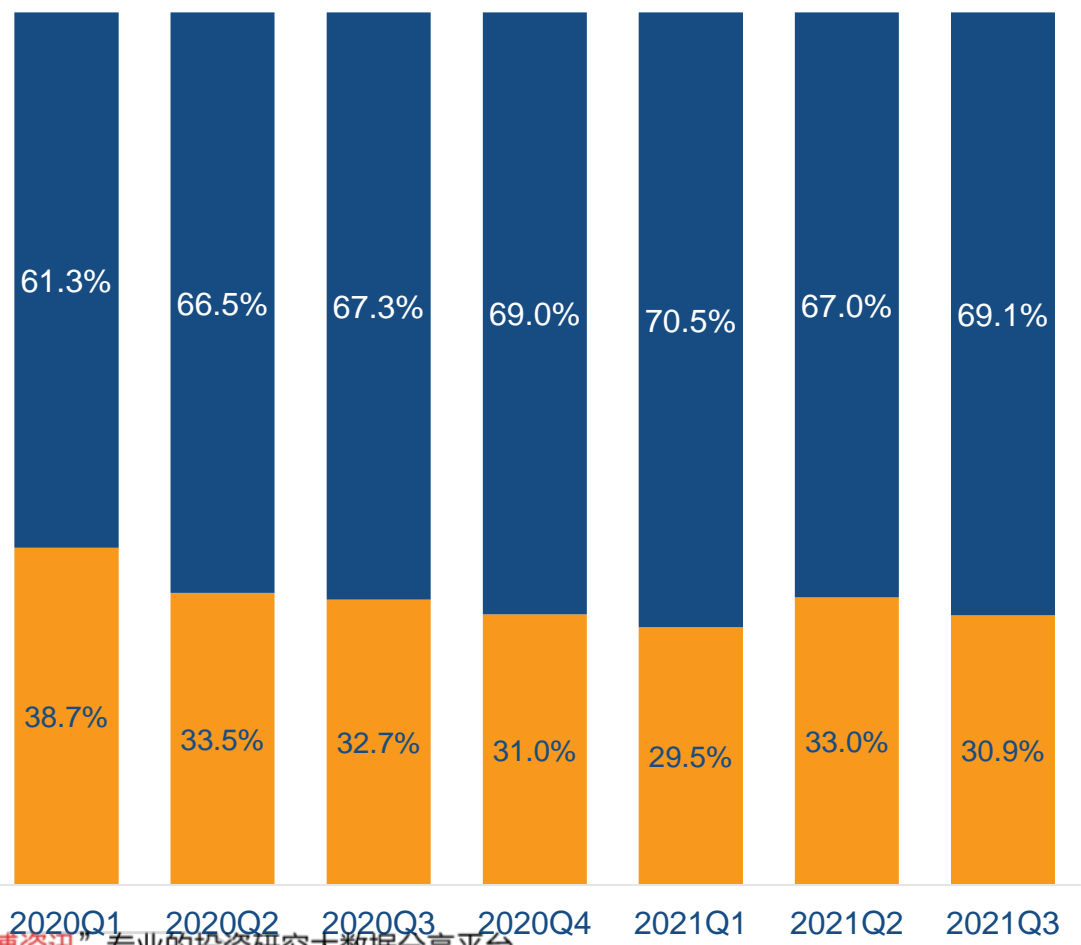
China Smartphone ASP Trend (CNY)



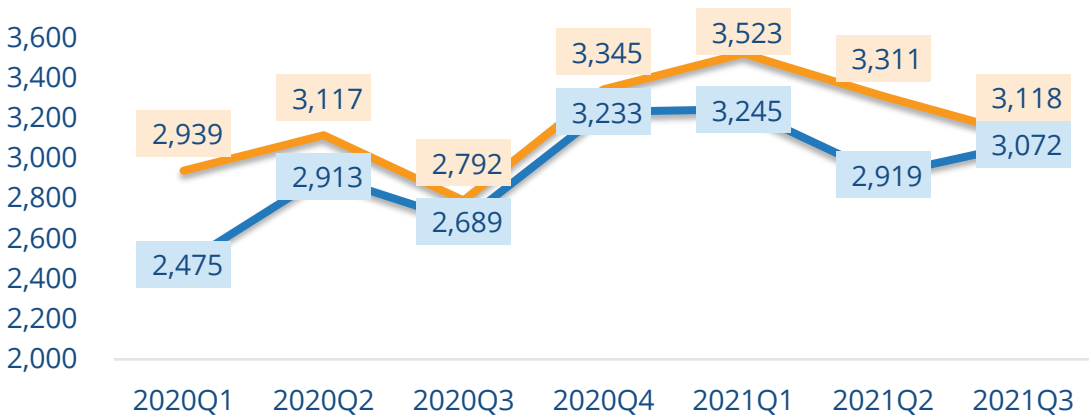
“慧博资讯”专业的投资研究大数据分享平台

线上渠道天花板难以突破，安卓市场高端产品促销季大幅降价拉高线上平均单价

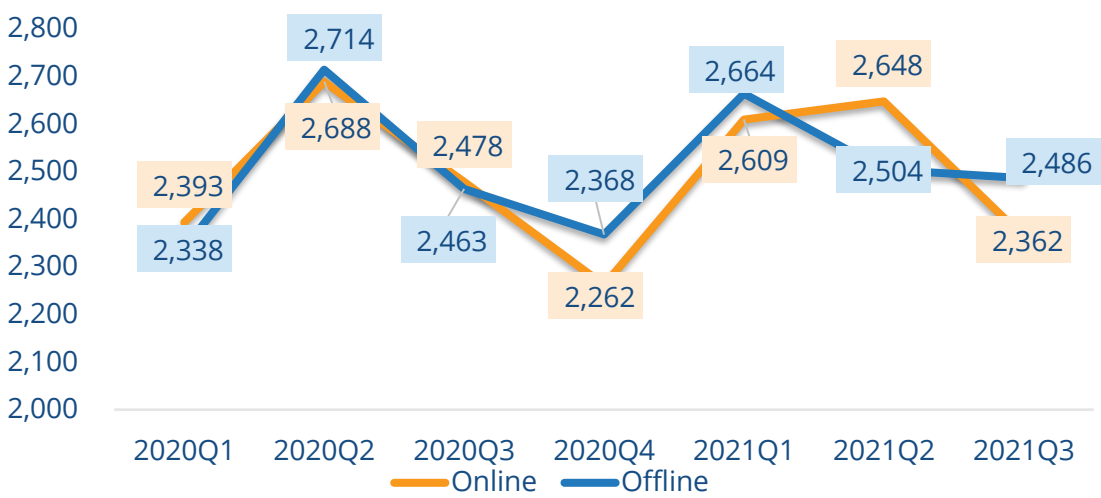
China **Overall** smartphone channel trend, 20Q3 – 21Q3



China **Overall** smartphone market ASP trend (CNY)



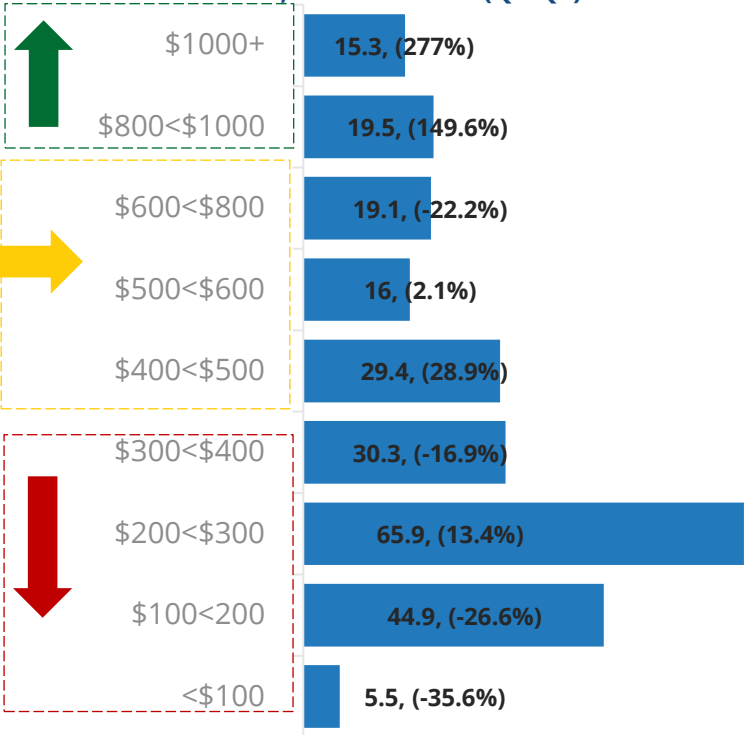
China **Android** smartphone market ASP trend (CNY)



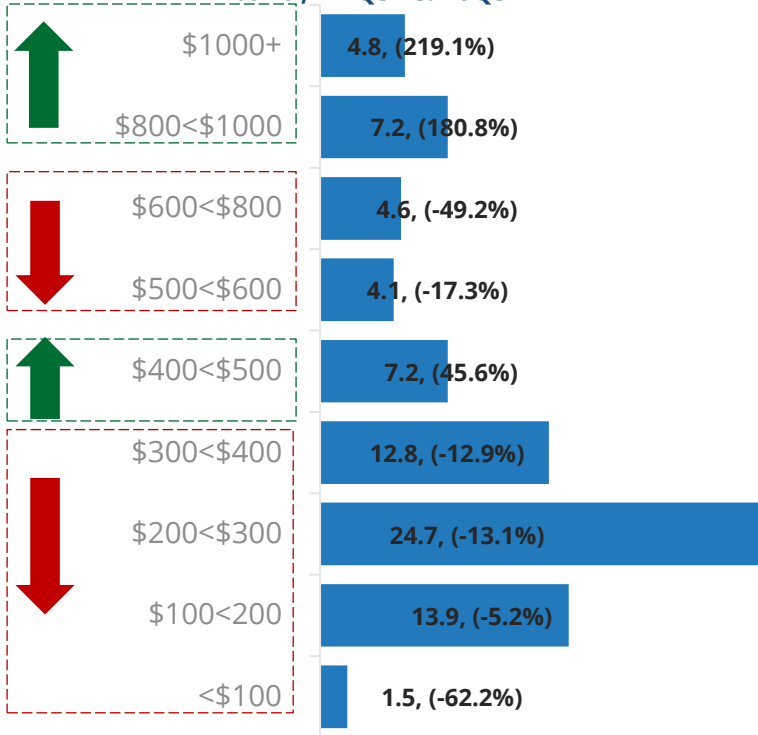
今年前三季度，国内市场累计增长2.8%，依靠超高端市场拉动市场增长

- ❑ 前三季度\$400以下市场容量累计下滑超过10%，5G吸引力不足，大量低端市场需求待满足
- ❑ 第三季度nova 9 上市，荣耀50持续热销，\$400-500价位段同比去年提升
- ❑ 手机市场价位段结构变化，与近年居民可支配收入增速变化对应

China Smartphone Shipments by price band, 2021 vs. 2020 (Q1-Q3)



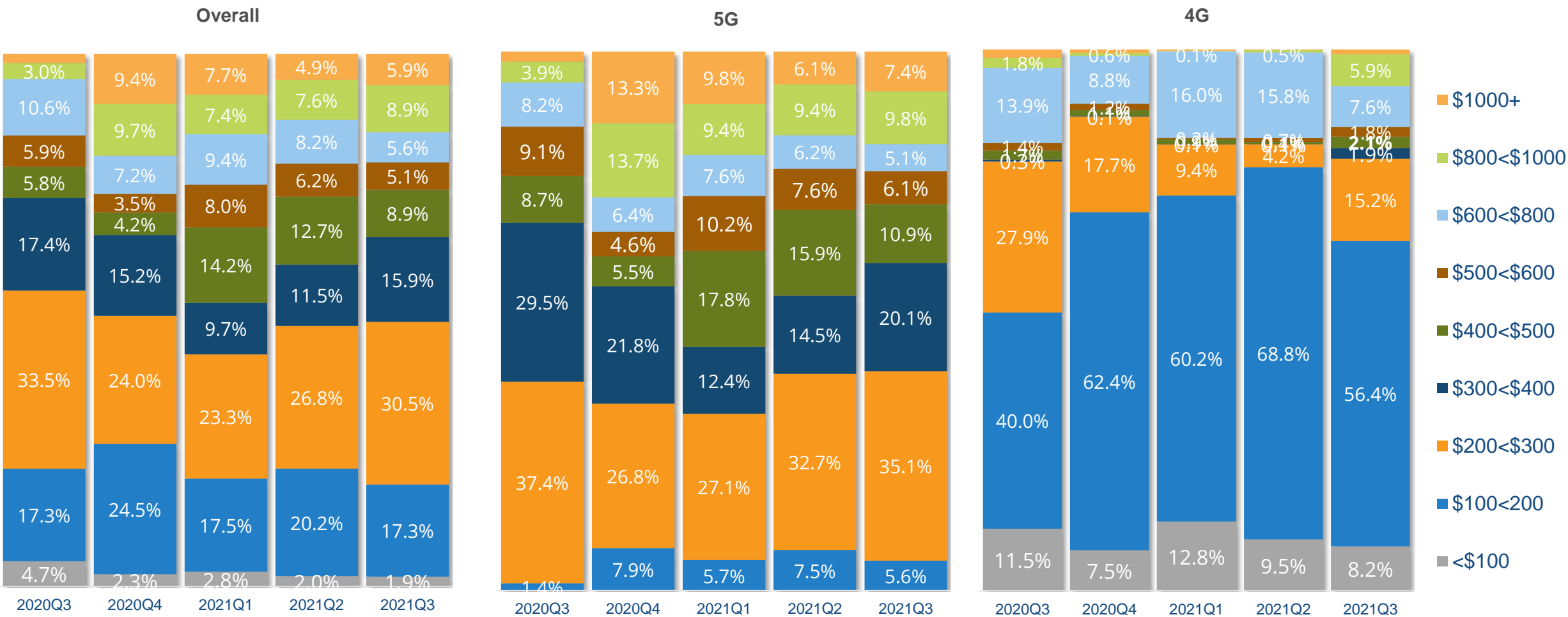
China Smartphone Shipments by price band, 21Q3 vs. 20Q3



自2020年以来连续6个季度，可支配收入平均数增速>可支配收入中位数增速

主流5G产品稳定在\$200-300价位段，>\$800市场连续稳定在15%比例

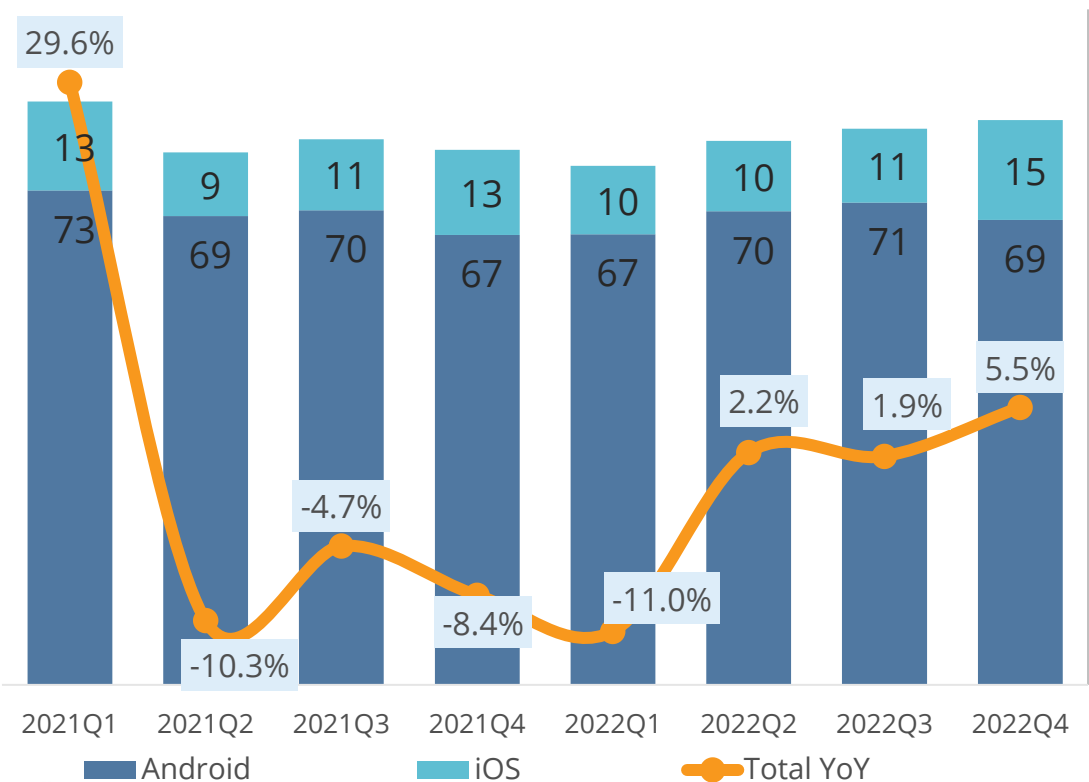
China Smartphone Market By Price Band (USD, exclude VAT)



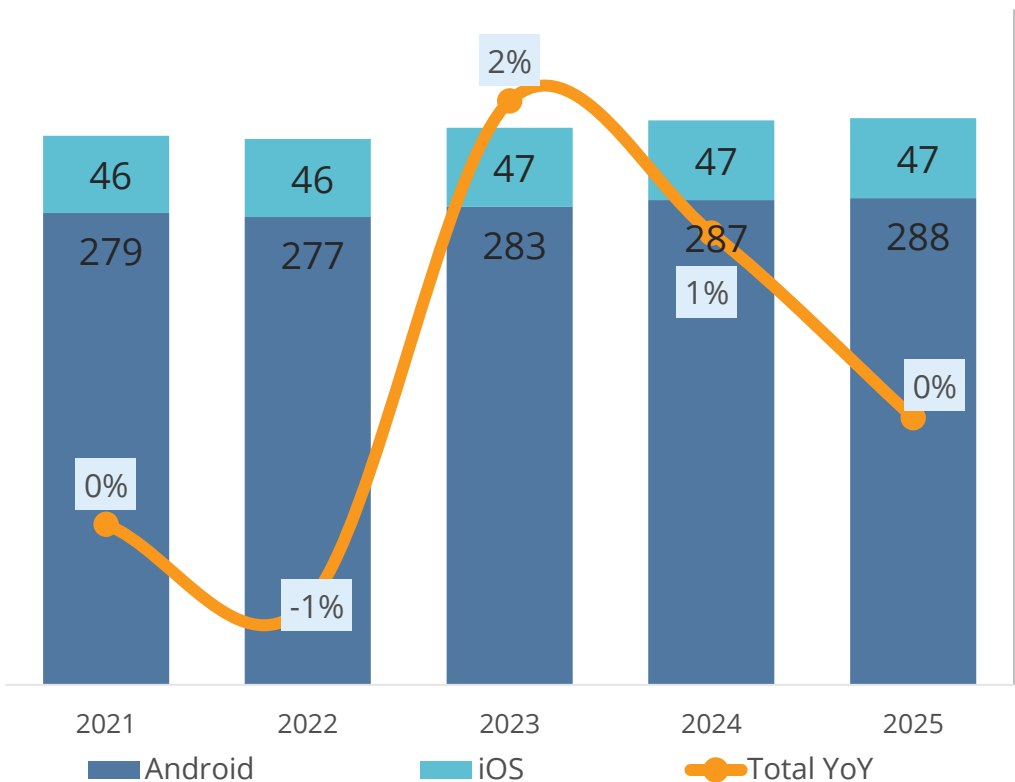
国内市场走向梳理：2022下滑，增长需看到2023年之后

- ❑ **需求收缩、供给冲击、预期转弱** —— 2021年第三季度降幅在预期之内，但随着第四季度及1月各家砍单，短期市场预期进一步下调
- ❑ 华为的一系列动作预计将在**直到2022年上半年的时间内，持续延长大量存量用户换机周期**
- ❑ 2022年基于**换机周期继续延长，二手市场继续冲击，技术与新品牌带动力不足**等原因，乐观估计微降1%。2023年起，基于**多品牌被市场接受与国产替代进度**乐观预计会出现相对大幅的一波换机，带动增长。

China Smartphone Shipments Forecast 21Q1-22Q4 (Unit: Million)



China Smartphone Shipments Forecast 2021-2025 (Unit: Million)



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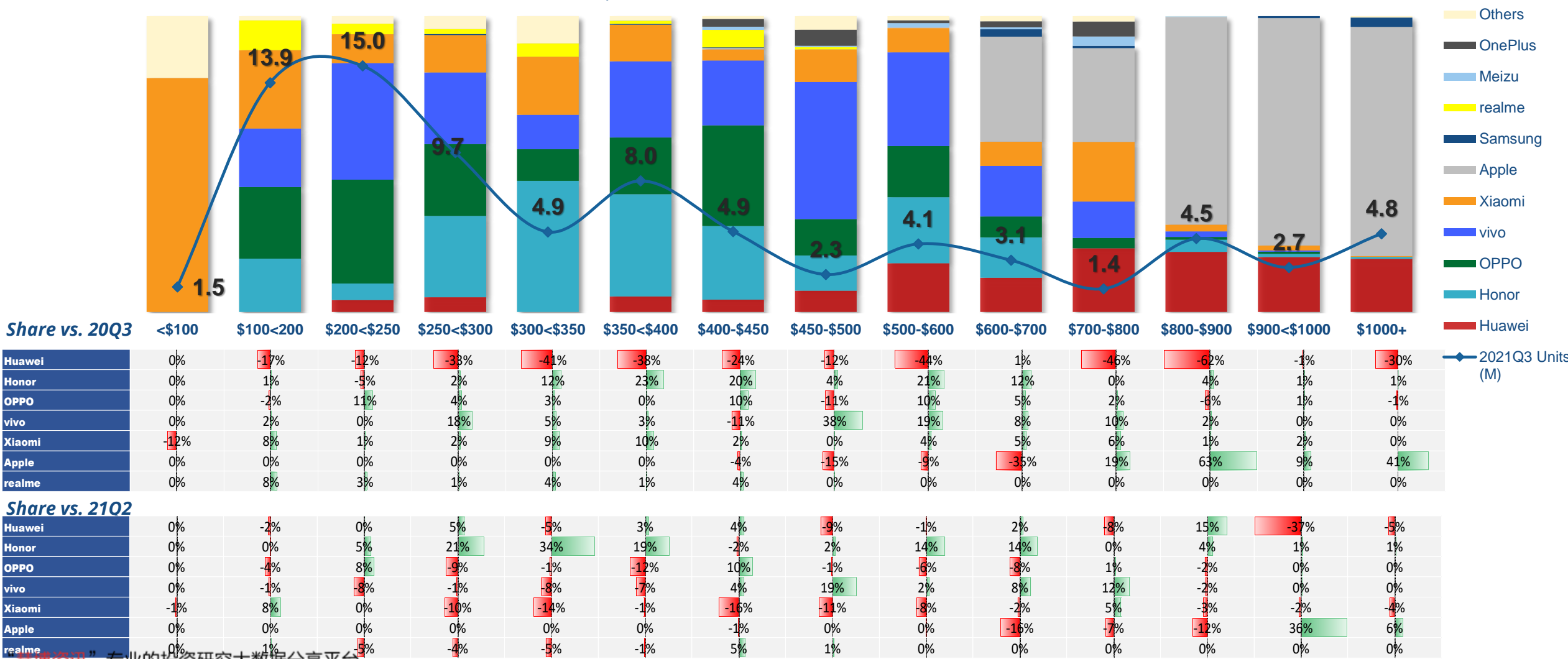
- 高端市场

- 折叠屏



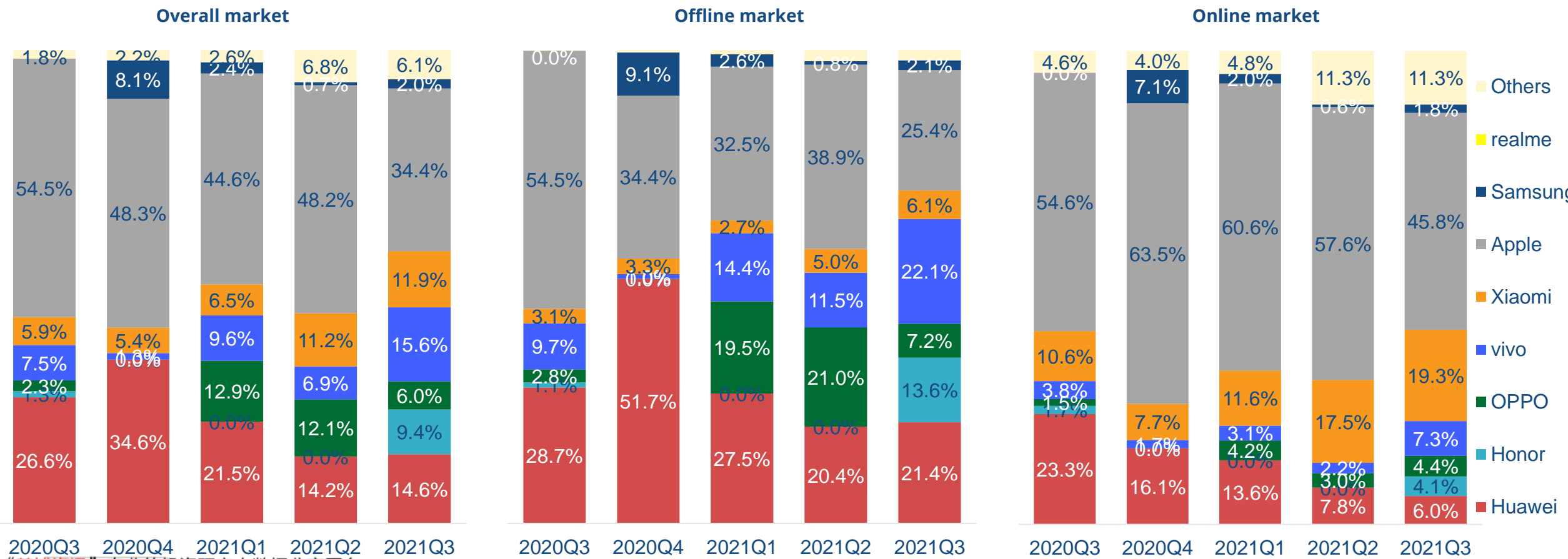
X20, 50系列带动荣耀\$250-\$400市场份额快速提升, Magic 3系列进入>\$600市场; OPPO A系列在\$200-\$250市场表现好; vivo两代S系列专注\$400-\$500市场; Note10缺货, K40系列等主力产品旺季过后减量, 小米\$200-\$600份额下降

China Smartphone Market Brand share in Price Band, 2021Q3



\$600-\$800市场同比下滑约22%， iPhone 12老品减量； vivo X70 Pro+ 与iQOO 8Pro 帮助vivo 份额超过15%； Magic 3系列进入高端市场

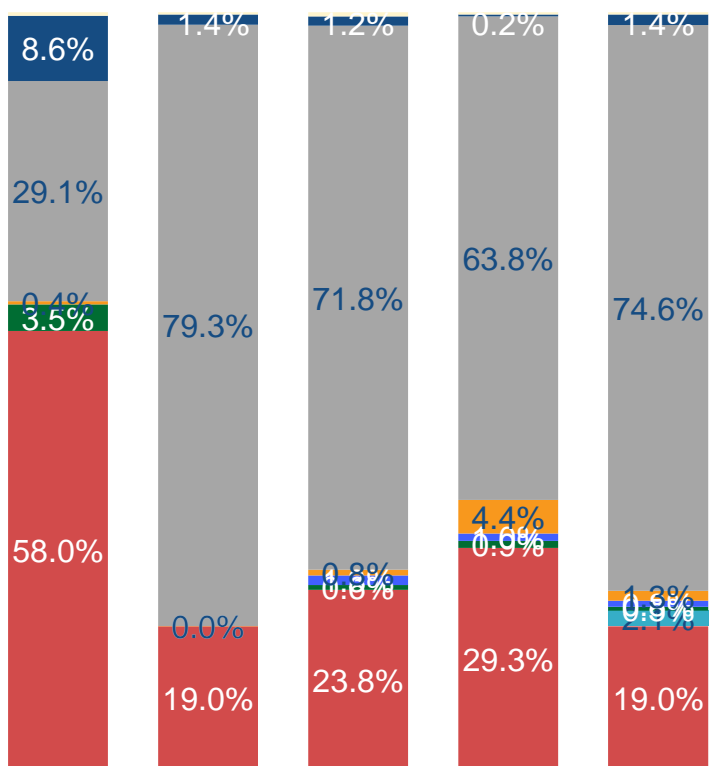
China Smartphone Brand share in \$600-\$800 price bands 20Q3 - 21Q3



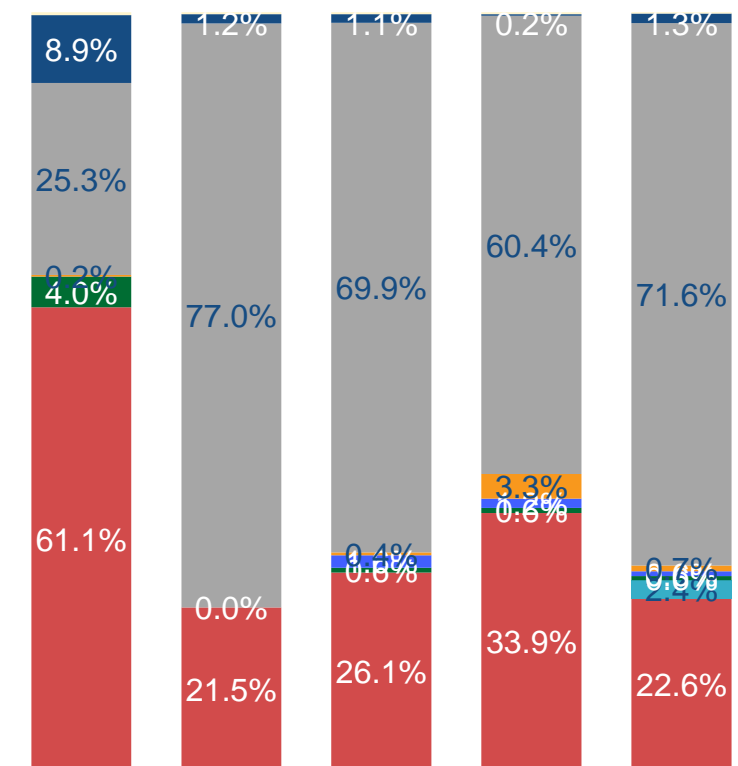
\$800市场同比上涨超过190%，iPhone 13系列拉动Apple份额提升，尤其线上渠道；P50 Pro和Mate系列4G版难以挽回劣势

China Smartphone Brand share in >\$800 price bands 20Q3 - 21Q3

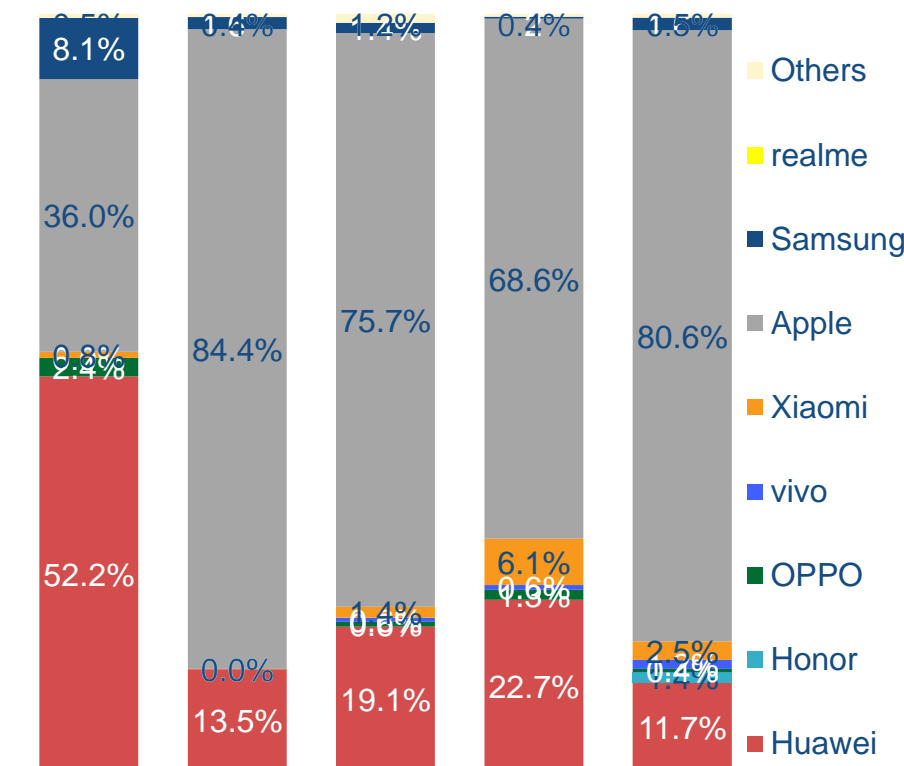
Overall market



Offline market



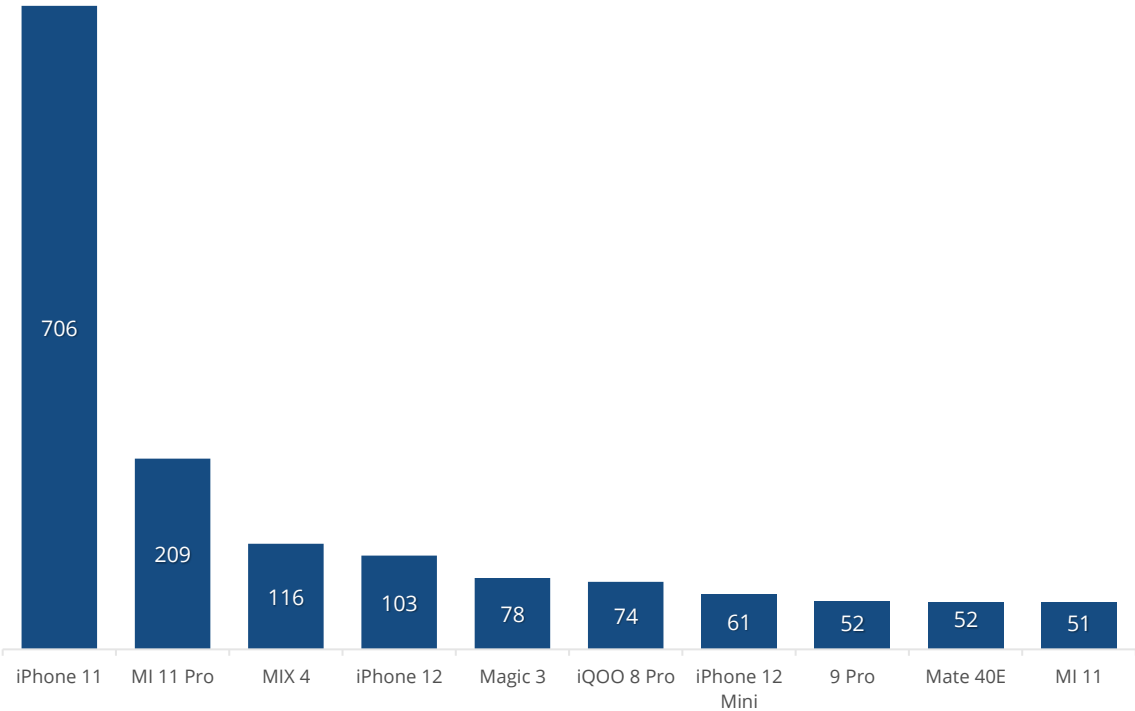
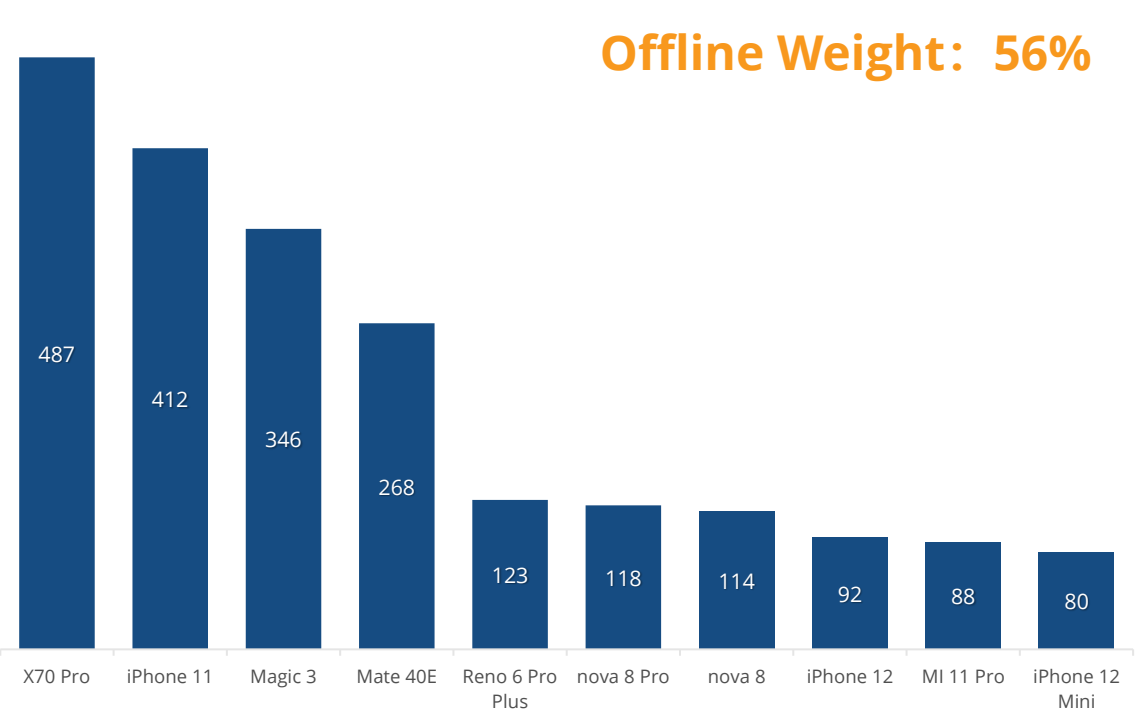
Online market



\$600-\$800国内市场，新锐安卓高端产品重点通过京东渠道拓展，线上占比超40%

Offline Top 10 models in \$600-\$800 market, 2021Q3

Online Top 10 models in \$600-\$800 market, 2021Q3

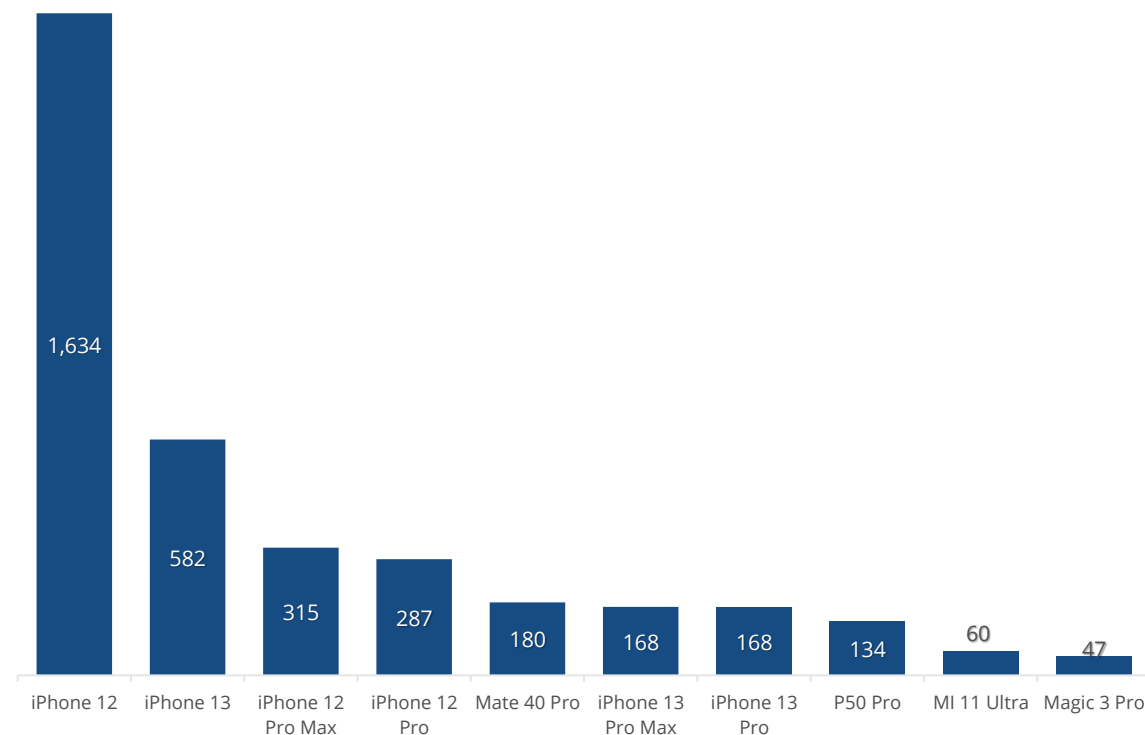
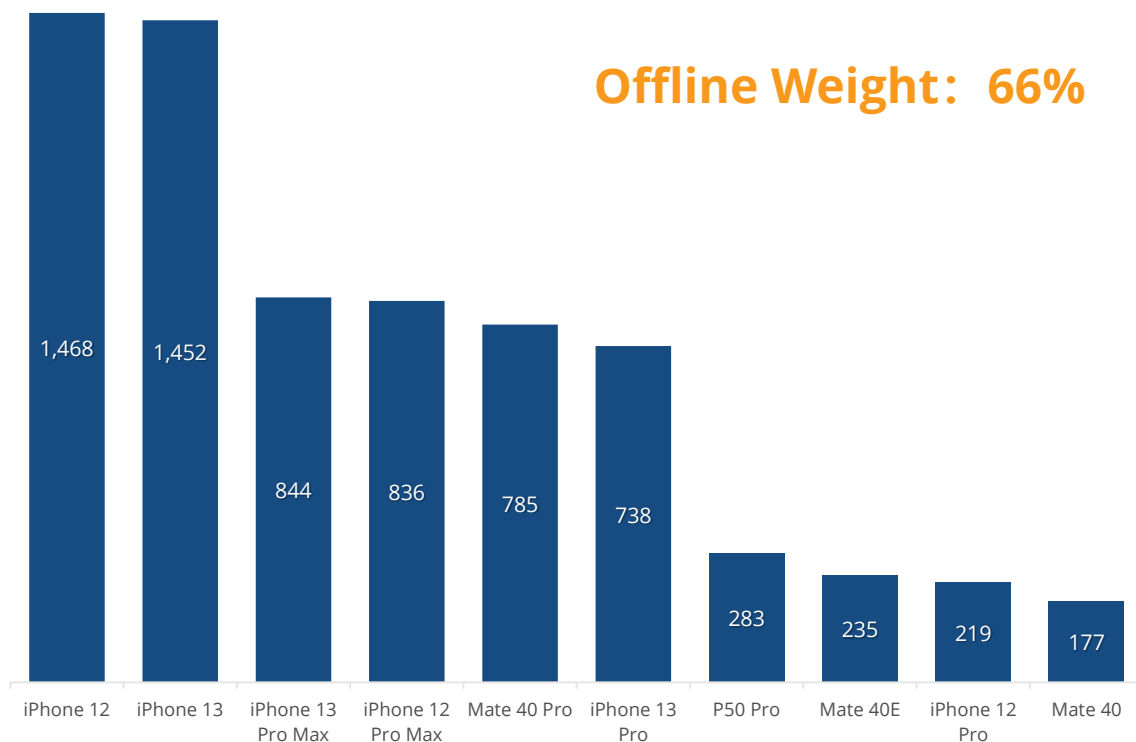


Shipment Units: K

>\$800国内市场，iPhone 12领军，线下市场Top 10被Apple、华为包揽；
iPhone 13系列首批主力放在线下

Offline Top models in >\$800 market, 2021Q3

Online Top models in >\$800 market, 2021Q3



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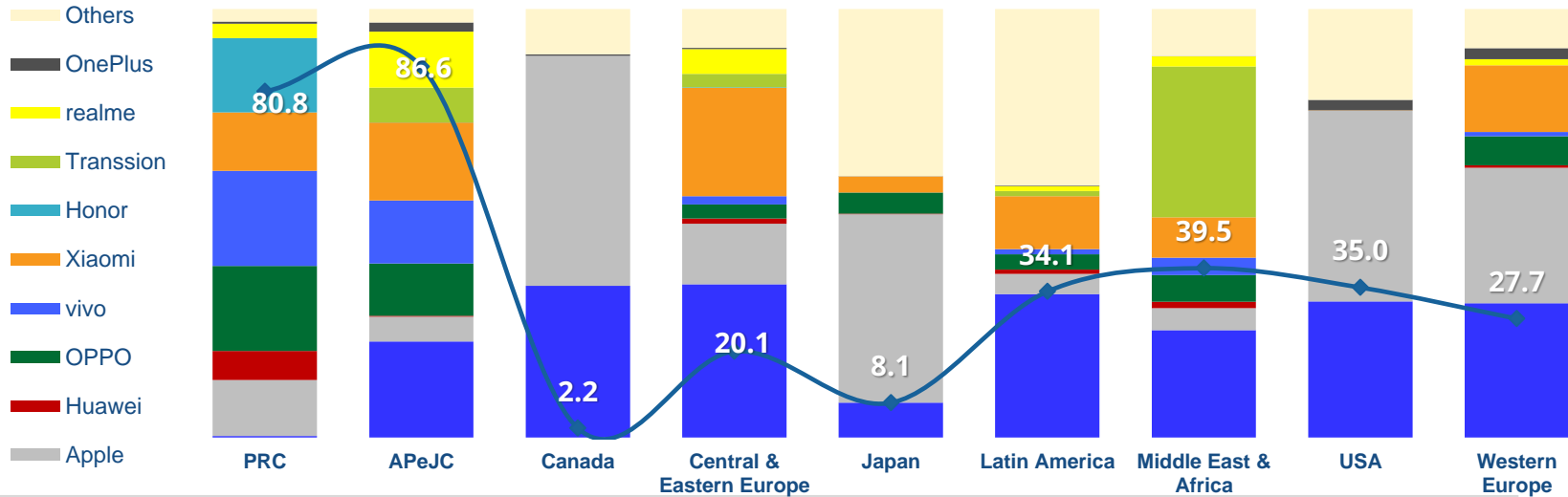
华为、荣耀在海外新兴市场的中低端份额被国产品牌迅速蚕食

- OPPO在拉美扩张产品线，实现A, Reno, Find系列在墨西哥全覆盖
- vivo亚太地区开始渗透中高端，量级有一定下降，低端产品开始在MEA主推
- realme二季度中国市场达到峰值4.9%，全年全球目标同比+50%以上，其中中国区完成超过1,000万
- 小米除中国、亚太市场外，主要在拉美、欧洲市场快速填补华为与荣耀的下滑获取份额的高速增长
- 传音转向亚太区市场，除印度外主要发力孟加拉、印尼、菲律宾；依靠类似OV的线下广告，线上KOL营销投入

Global Top Smartphone Company market share change in Regions, 21Q3 vs 20Q3

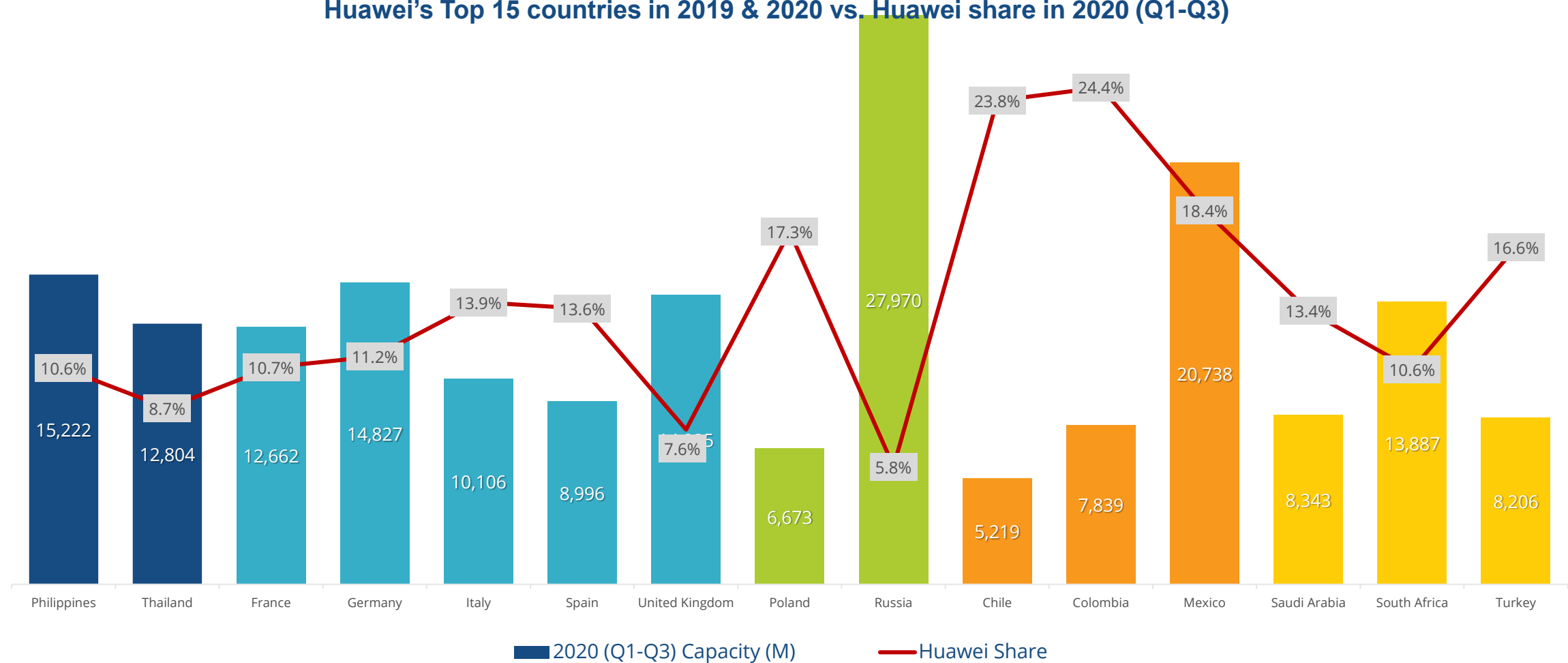
	PRC	APeJC	Canada	Central & Eastern Europe	Japan	Latin America	Middle East & Africa	USA	Western Europe
Samsung	-0.1%	-1.7%	-0.5%	-3.1%	2.5%	-8.6%	0.2%	1.5%	-4.2%
Apple	4.7%	2.5%	9.3%	5.7%	0.3%	0.5%	1.1%	3.5%	3.1%
Huawei	-22.0%	-1.4%	-3.6%	-7.9%	-1.2%	-10.0%	-8.2%	0.0%	-7.6%
OPPO	3.2%	-0.8%	0.0%	1.3%	2.2%	3.1%	1.1%	0.0%	3.6%
vivo	4.4%	-0.9%	0.0%	0.8%	0.0%	1.2%	1.8%	0.0%	1.0%
Xiaomi	0.7%	-0.9%	0.0%	1.0%	2.0%	2.9%	-0.1%	0.0%	2.8%
Honor	4.8%	-0.1%	0.0%	-7.2%	0.0%	-0.5%	-1.1%	0.0%	-0.6%
Transsion	0.0%	3.8%	0.0%	2.2%	0.0%	1.2%	4.5%	0.0%	0.0%
realme	2.8%	-0.1%	0.0%	4.2%	0.0%	1.1%	0.0%	0.0%	0.9%
OnePlus	0.0%	1.1%	0.0%	0.2%	0.0%	0.2%	-0.1%	2.0%	1.2%

Global Top Smartphone Market Company share in Regions, Q3 2021

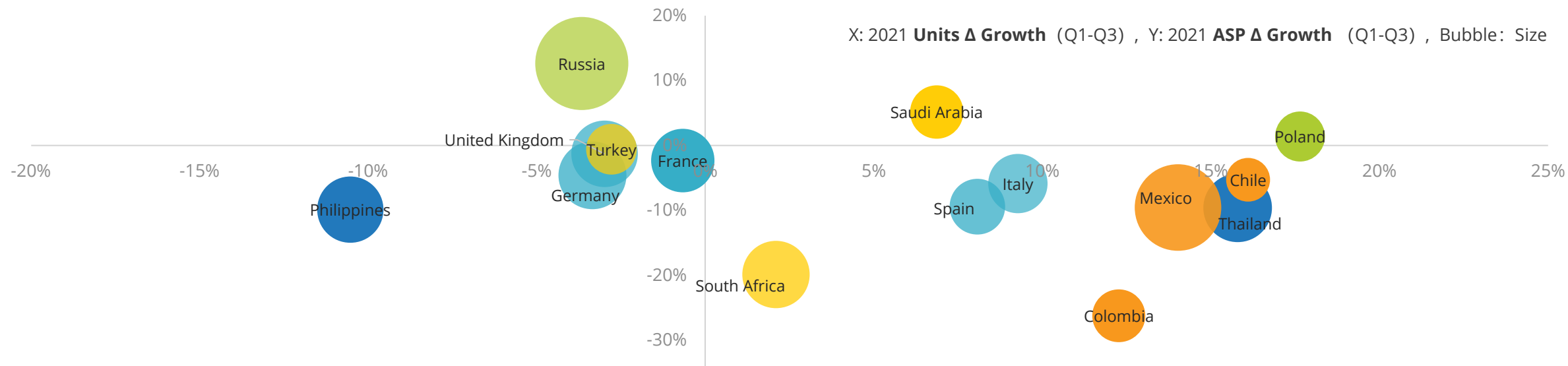


华为海外出货量前15国家占总体华为海外市场约52%，7个在欧洲；高份额市场集中在拉美、中东

Huawei's Top 15 countries in 2019 & 2020 vs. Huawei share in 2020 (Q1-Q3)



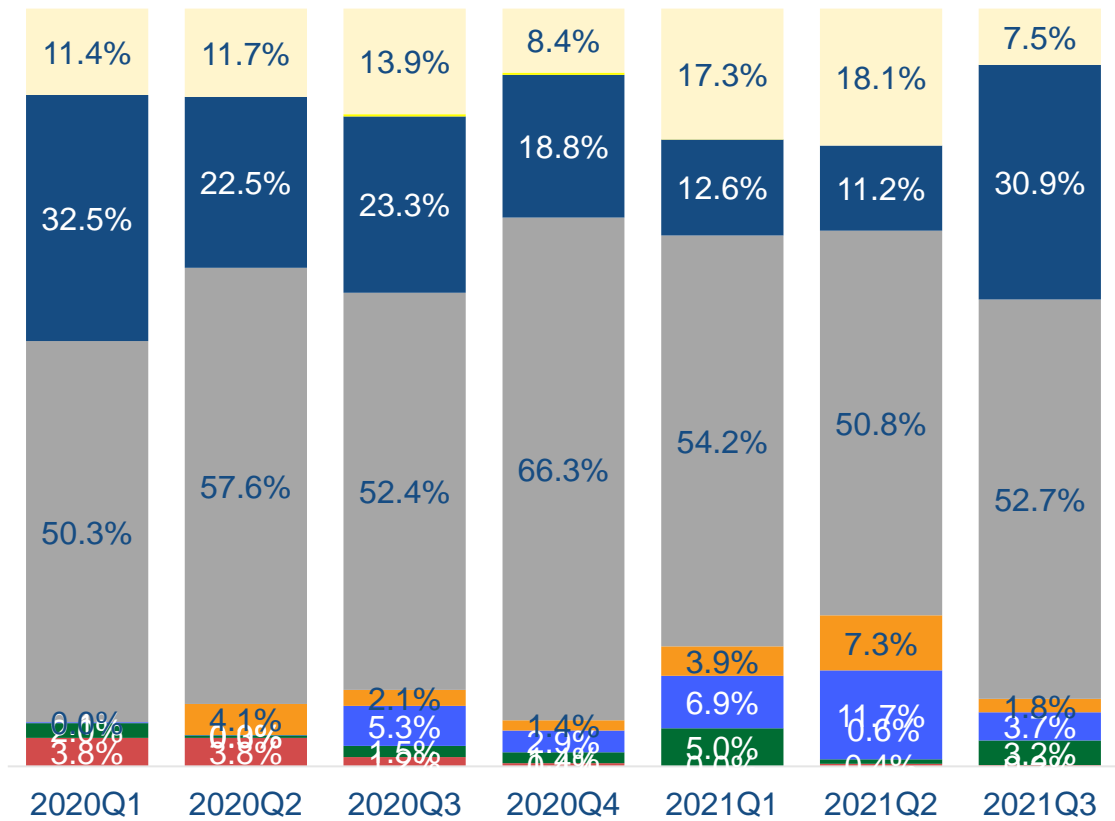
LA、A/P地区低端产品抢占市场；CEE地区三星、小米分别在波兰、俄罗斯获益；WE地区德、意、法小米获益最多，OPPO份额在意、西靠低端A系列提升较大



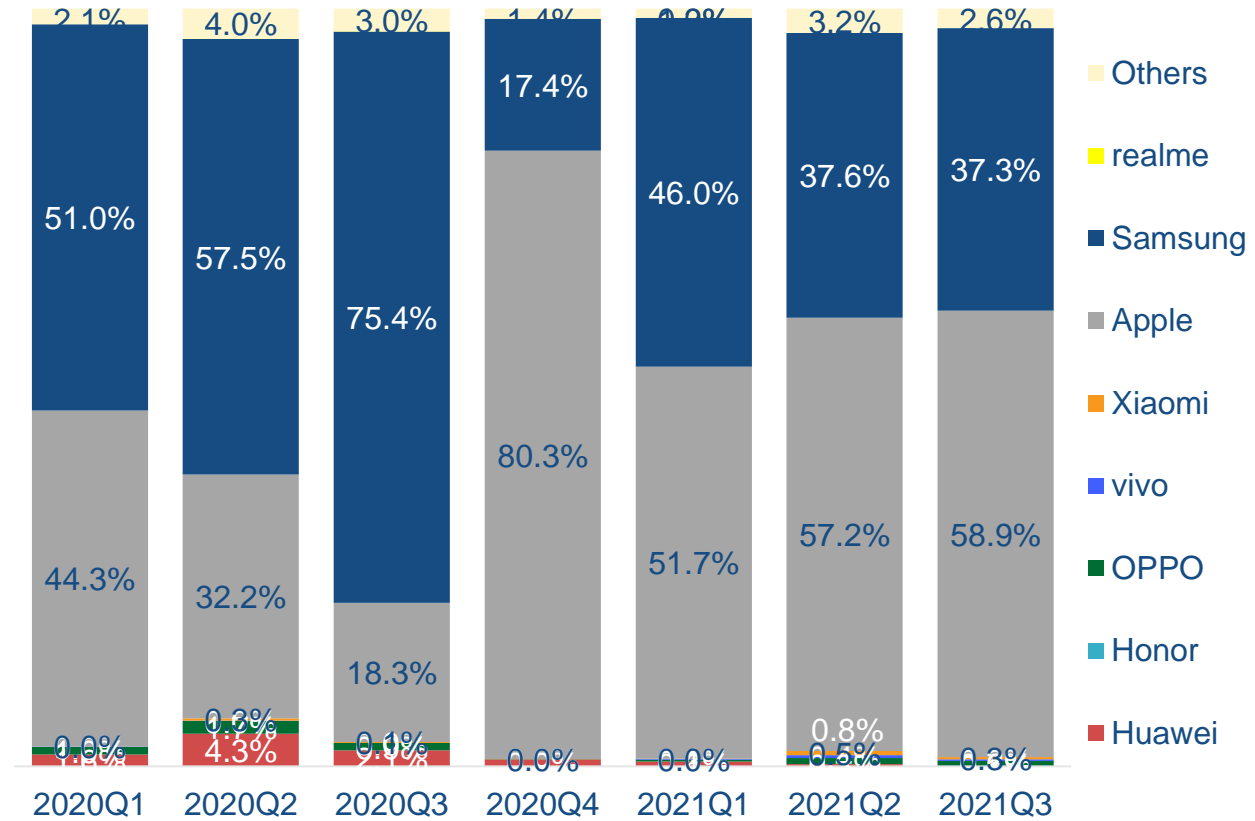
	Philippines	Thailand	France	Germany	Italy	Spain	United Kingdom	Poland	Russia	Chile	Colombia	Mexico	Saudi Arabia	South Africa	Turkey
Huawei	-8.8%	-6.9%	-9.6%	-10.1%	-12.6%	-11.9%	-7.0%	-13.6%	-5.1%	-21.9%	-18.8%	-16.9%	-12.1%	-5.5%	-12.4%
Samsung	2.3%	3.1%	-3.4%	-2.1%	-3.1%	0.7%	0.3%	8.3%	-1.2%	-3.5%	-2.4%	-4.6%	9.5%	1.2%	-4.5%
Apple	0.1%	1.2%	2.7%	3.4%	0.7%	0.8%	3.7%	0.2%	3.0%	0.6%	-0.7%	-0.2%	-0.5%	-0.4%	6.6%
OPPO	3.6%	-1.6%	3.3%	0.5%	7.6%	6.6%	1.0%	2.0%	0.1%	1.5%	0.3%	9.7%	1.3%	1.7%	2.4%
vivo	-4.2%	-3.6%	0.9%	0.4%	1.0%	1.4%	0.4%	1.4%	0.3%	2.5%	3.1%	1.1%	2.6%	0.9%	1.0%
Xiaomi	5.4%	8.5%	6.9%	6.9%	7.0%	3.2%	0.6%	0.3%	8.7%	15.0%	8.8%	5.5%	7.2%	0.6%	-1.6%
Honor	0.0%	0.0%	-1.4%	-0.8%	-0.9%	-0.5%	-0.7%	-0.4%	-15.5%	0.0%	-0.4%	-0.4%	-2.9%	-0.1%	-0.4%
realme	3.1%	-3.3%	0.8%	0.4%	2.3%	0.8%	0.0%	4.9%	3.0%	0.2%	1.1%	1.5%	0.5%	0.0%	0.0%
Transsion	6.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	7.7%	0.0%	5.0%	1.4%	1.8%
OnePlus	0.1%	0.1%	1.0%	1.4%	0.0%	0.3%	1.9%	0.0%	0.2%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%

亚太市场>\$800 价位段 (5.5%) 三星、Apple为主流, \$600-\$800 (1.5%) 市场小米, OPPO, vivo, 一加共同占据约20%

A/P Smartphone Brand share in \$600-\$800 price bands 20Q1 - 21Q3

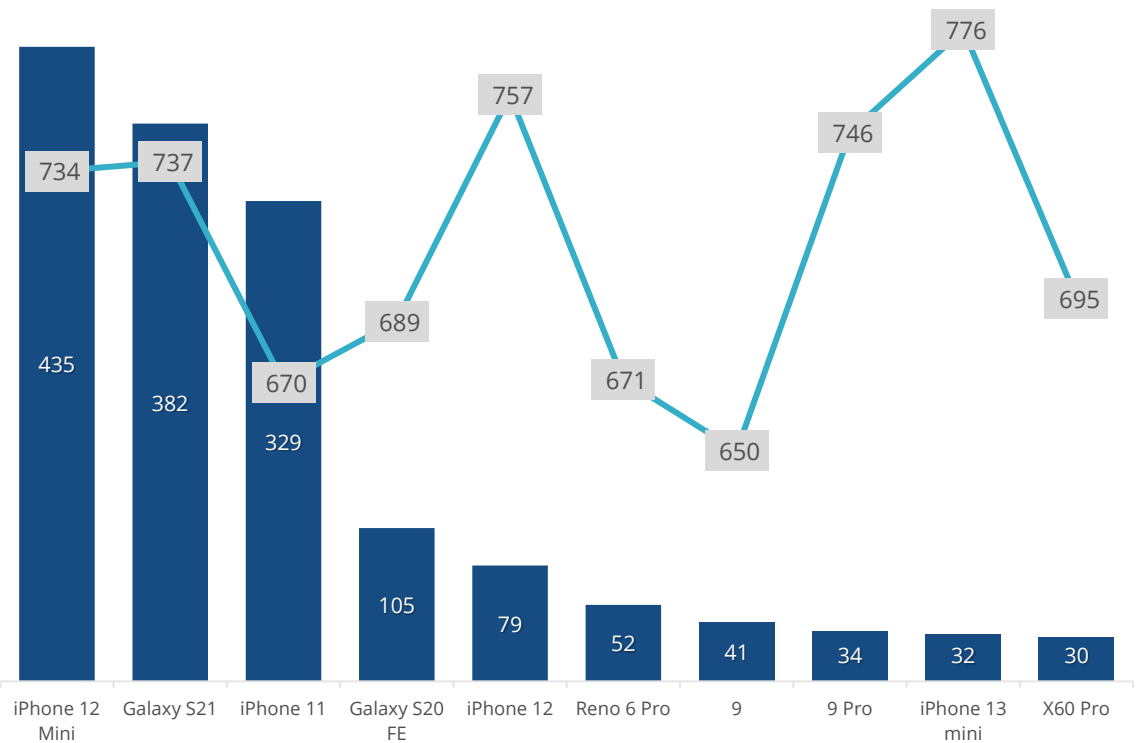


A/P Smartphone Brand share in >\$800 price bands 20Q1 - 21Q3

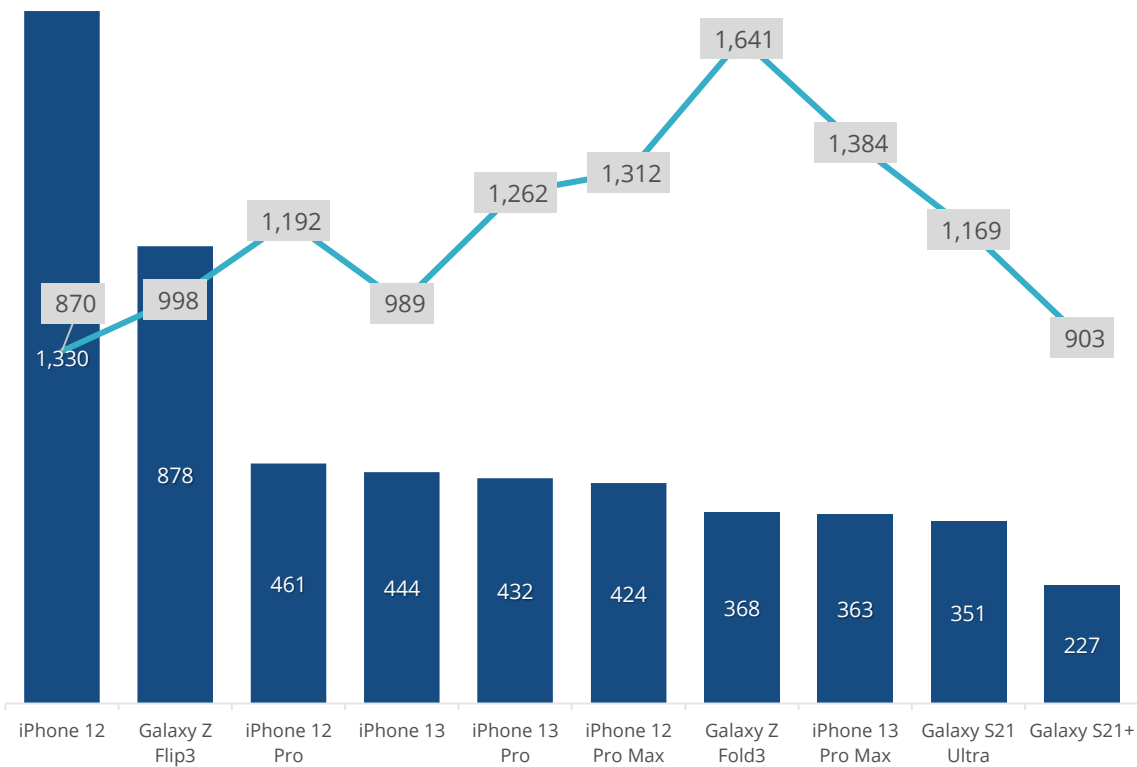


\$600-\$800市场，OPPO, 一加, vivo进入前十， >\$800市场，三星两款新折叠屏全部进入

A/P Top 10 models in \$600-\$800 market, 2021Q3

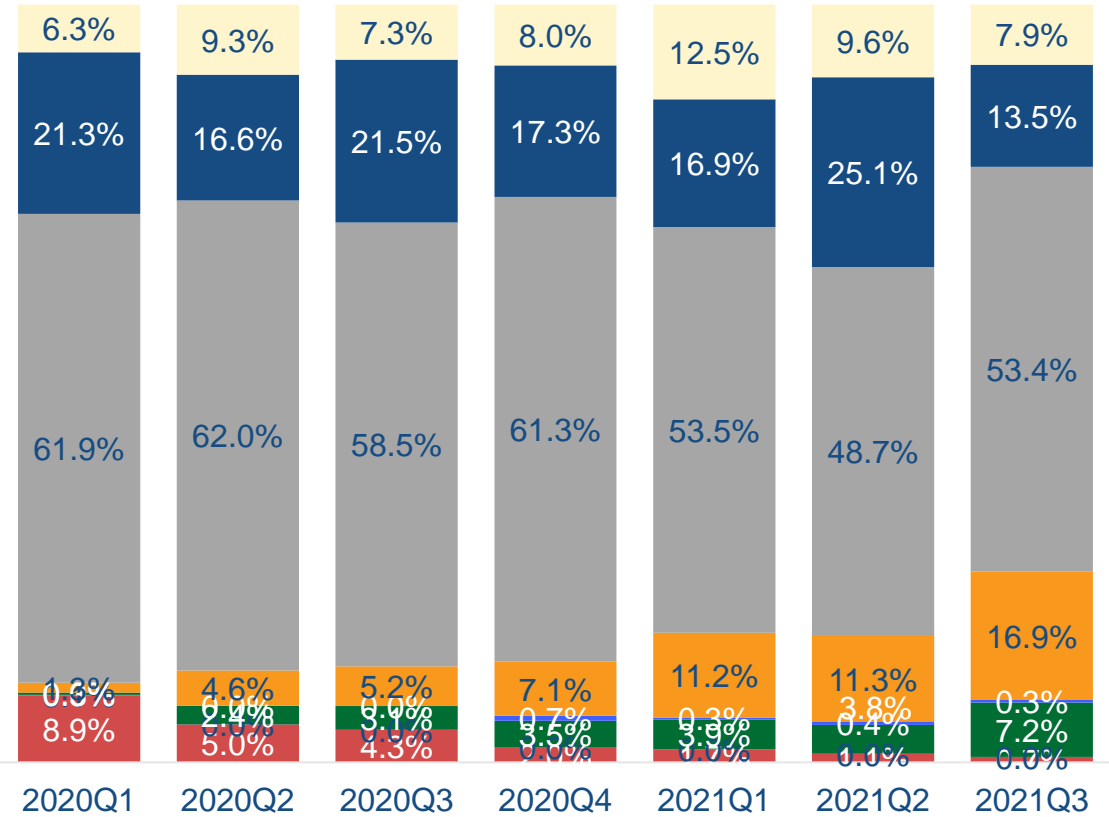


A/P Top 10 models in >\$800 market, 2021Q3

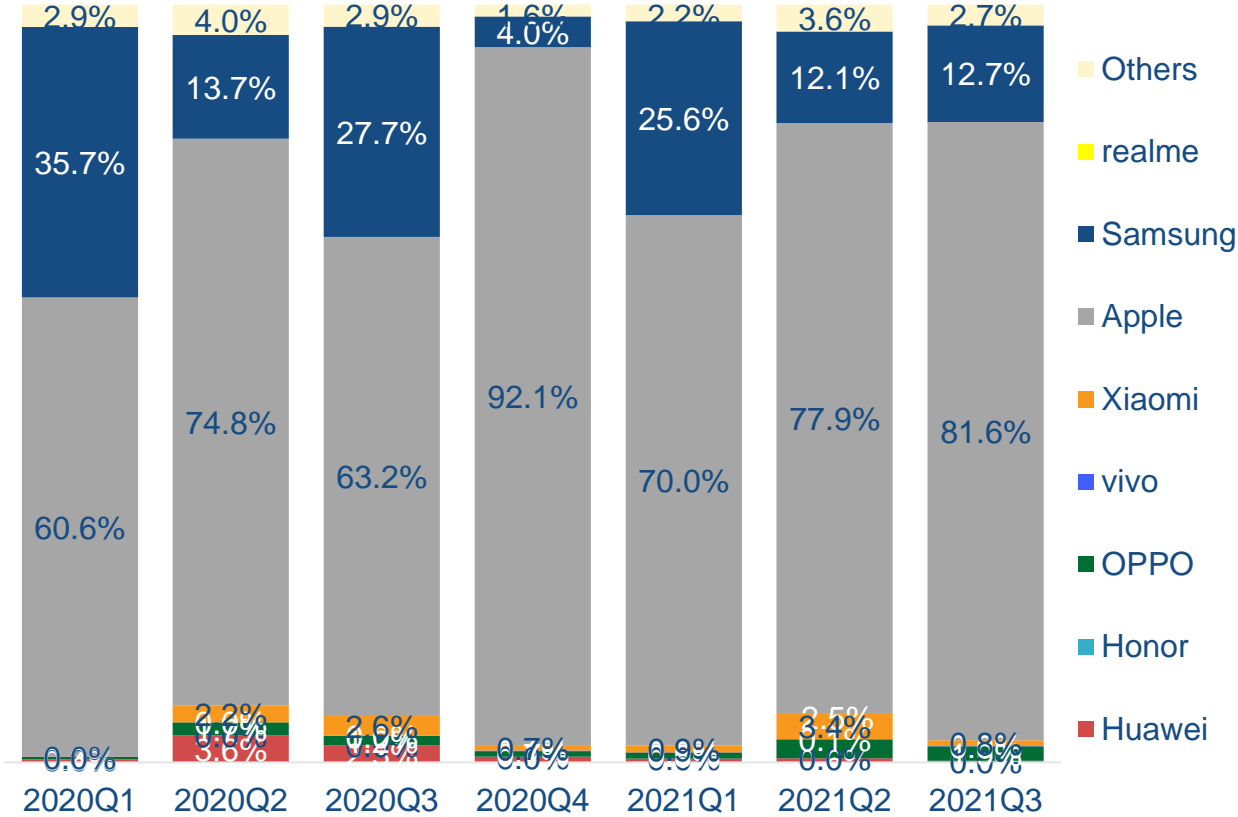


西欧市场>\$800（29.6%）价位段苹果占据统治地位，\$600-\$800（8.3%）市场小米，OPPO逐渐起势

WE Smartphone Brand share in \$600-\$800 price bands 20Q1 - 21Q3

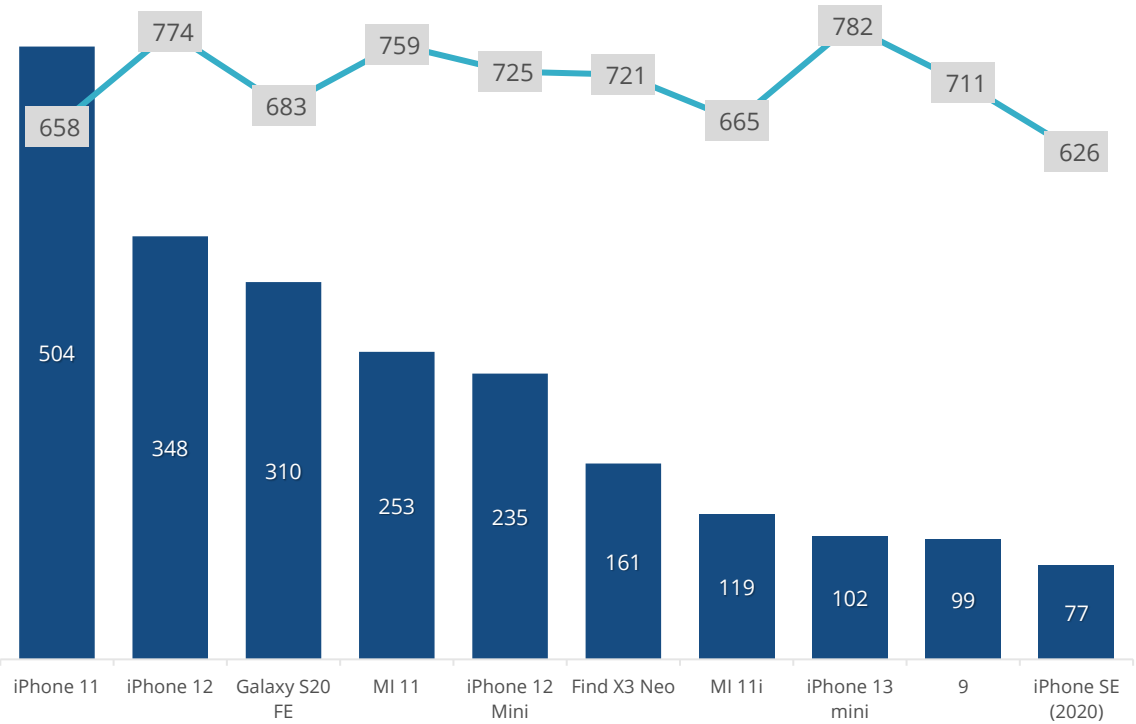


WE Smartphone Brand share in >\$800 price bands 20Q1 - 21Q3

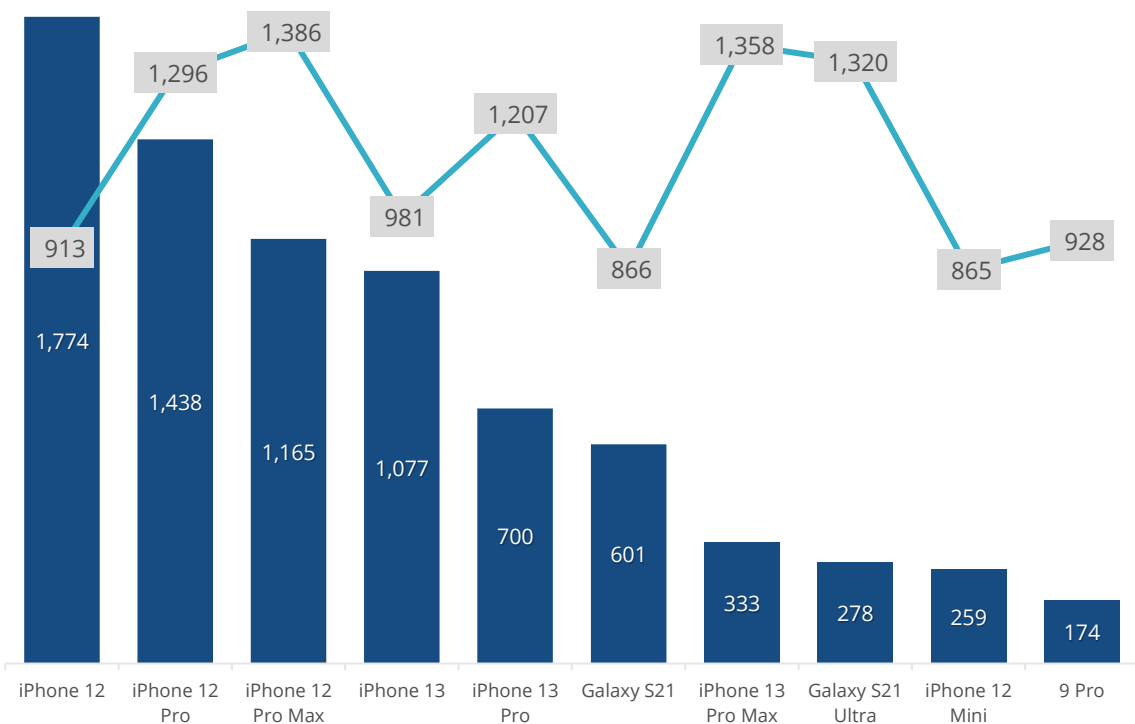


\$600-\$800市场，国产品牌在Top 10中占据4个， >\$800市场，一加进入前十

WE Top 10 models in \$600-\$800 market, 2021Q3

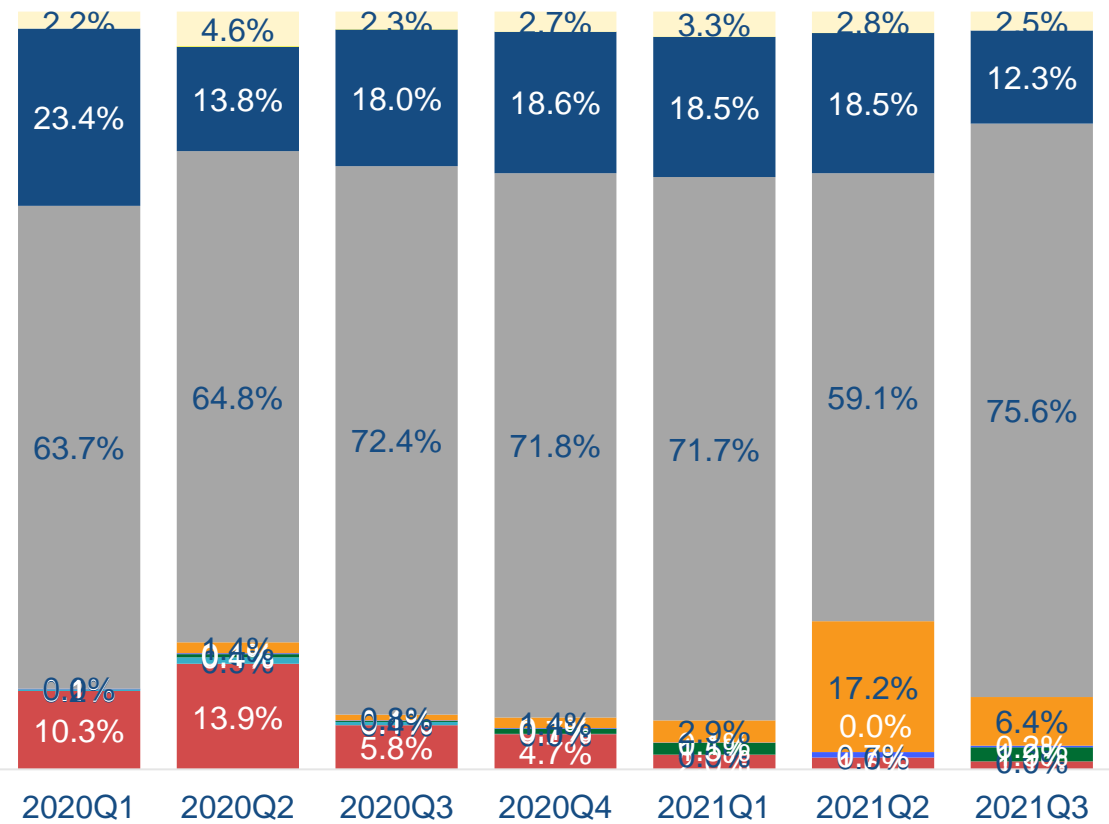


WE Top 10 models in >\$800 market, 2021Q3

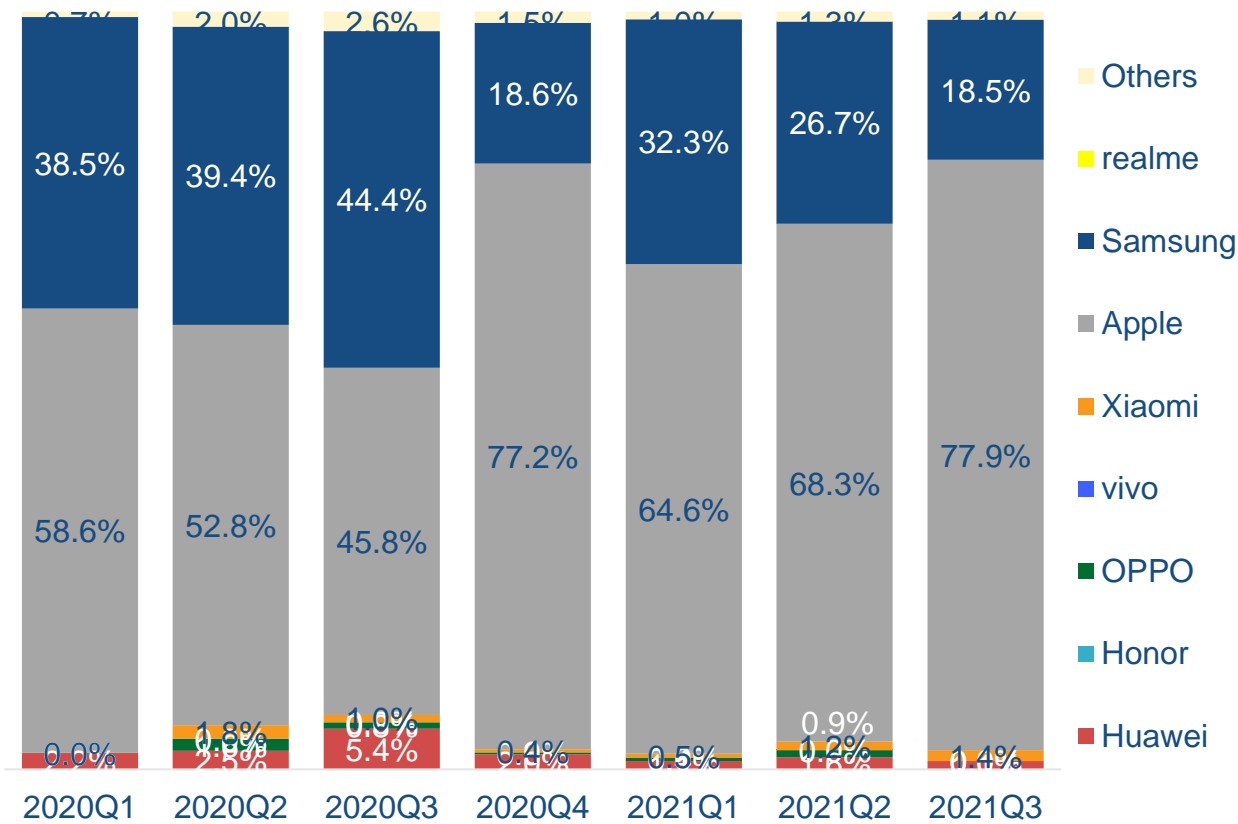


小米11系列在CEE市场\$600-\$800（5.7%）价位段短期有所斩获，>\$800市场国产品牌难以进入（7.2%）

CEE Smartphone Brand share in \$600-\$800 price bands 20Q1 - 21Q3

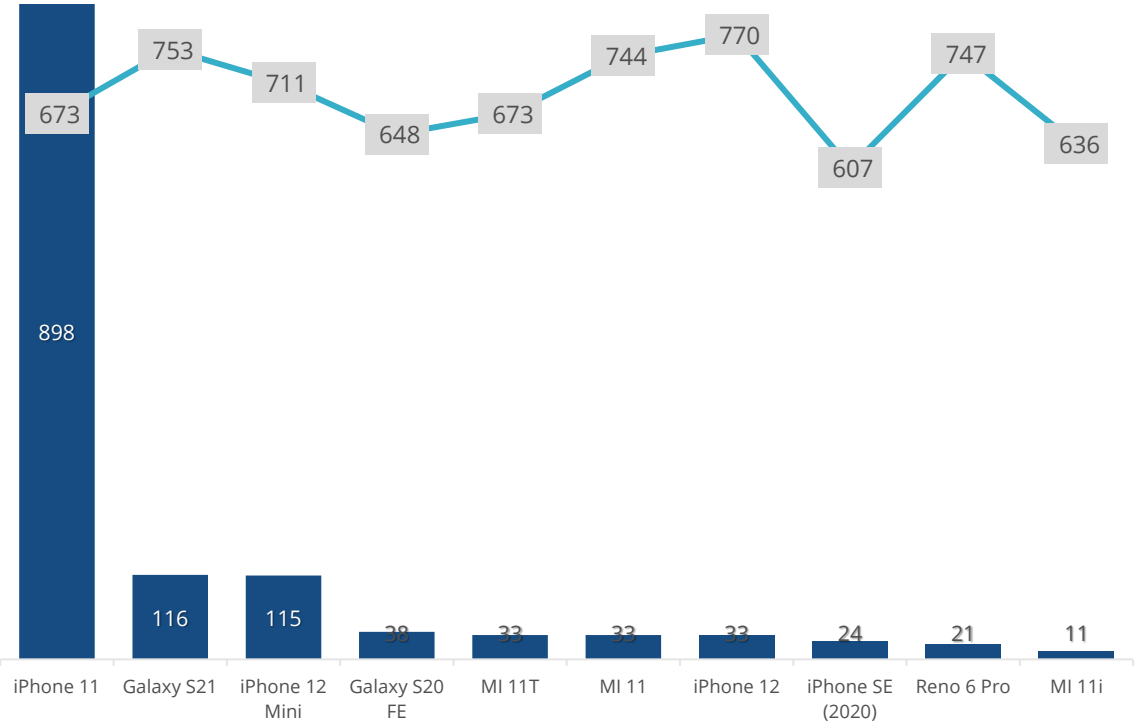


CEE Smartphone Brand share in >\$800 price bands 20Q1 - 21Q3

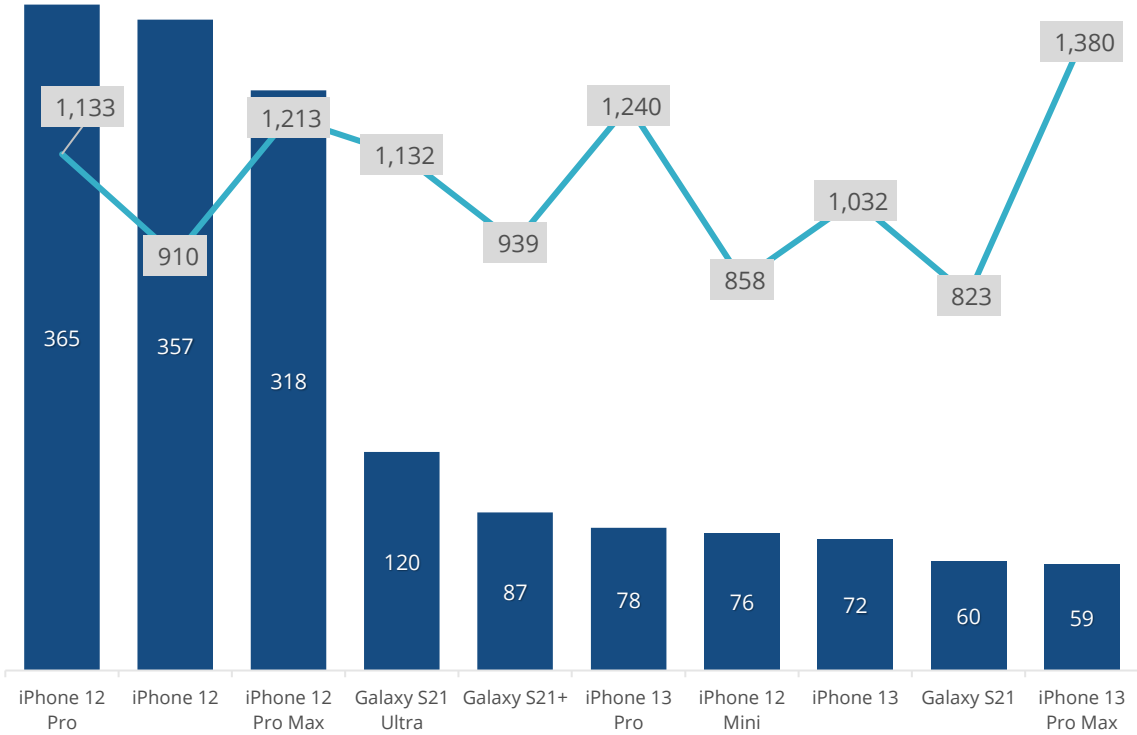


CEE \$600-\$800市场集中度高， iPhone 11 占比超过60%

CEE Top 10 models in \$600-\$800 market, 2021Q3

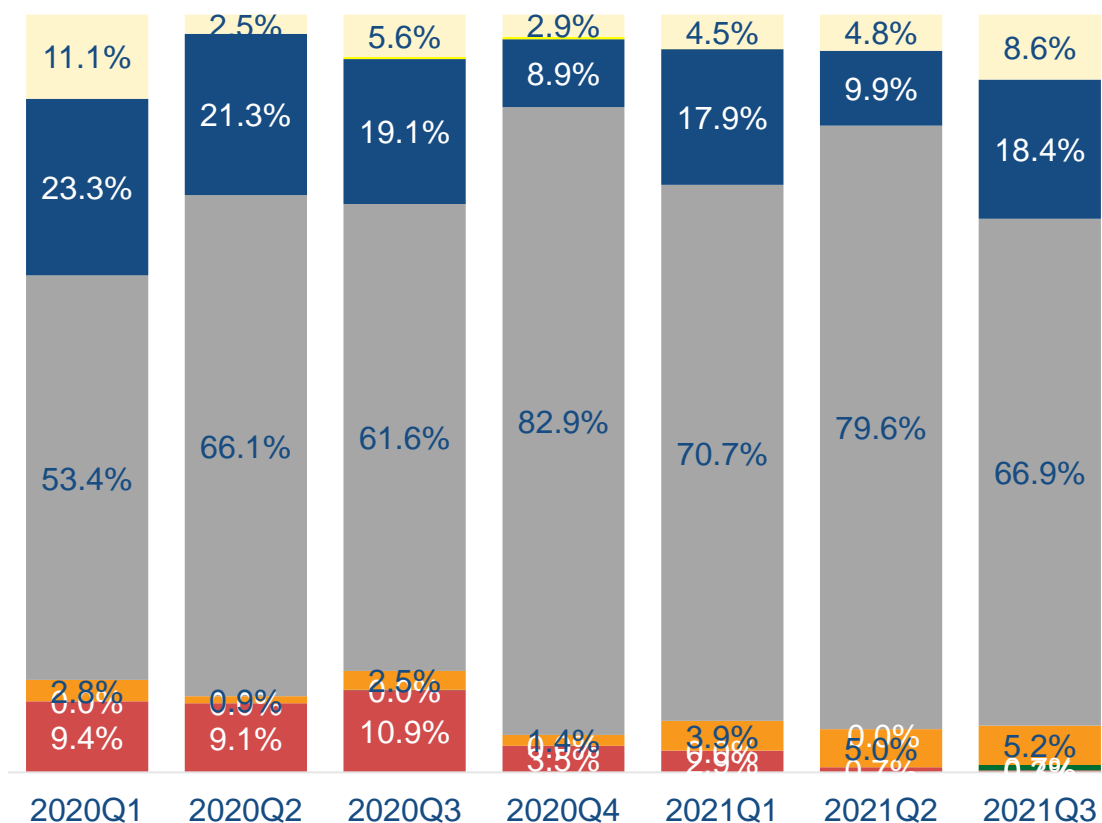


CEE Top 10 models in >\$800 market, 2021Q3

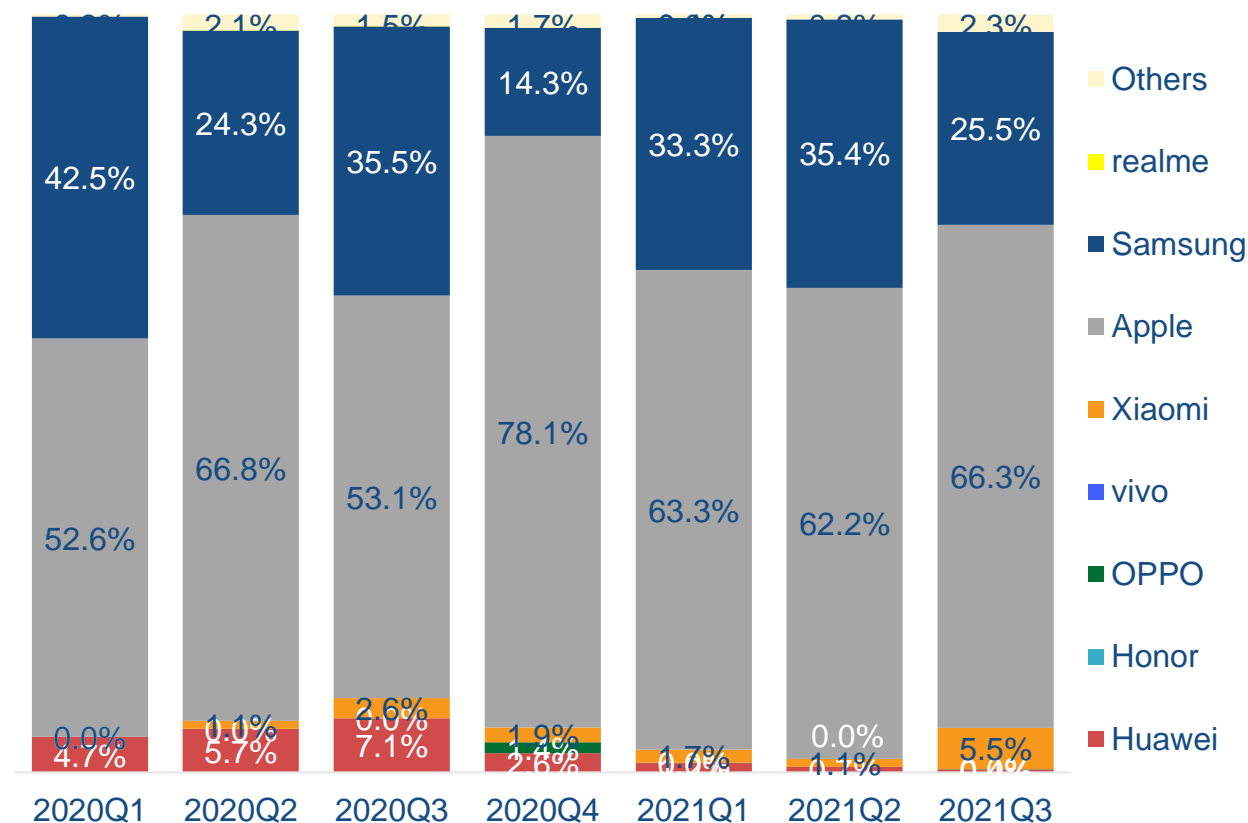


LA 高端市场 (5.9%) 华为退出后，国产品牌Moto、小米接盘

LA Smartphone Brand share in \$600-\$800 price bands 20Q1 - 21Q3

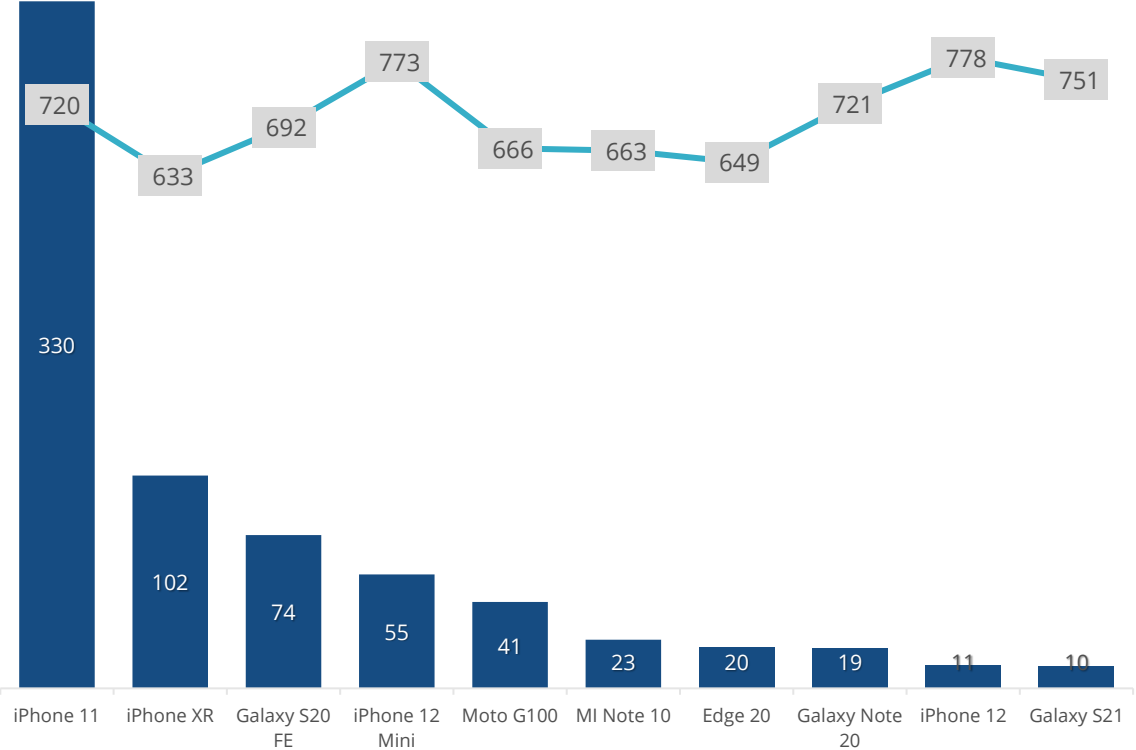


LA Smartphone Brand share in >\$800 price bands 20Q1 - 21Q3

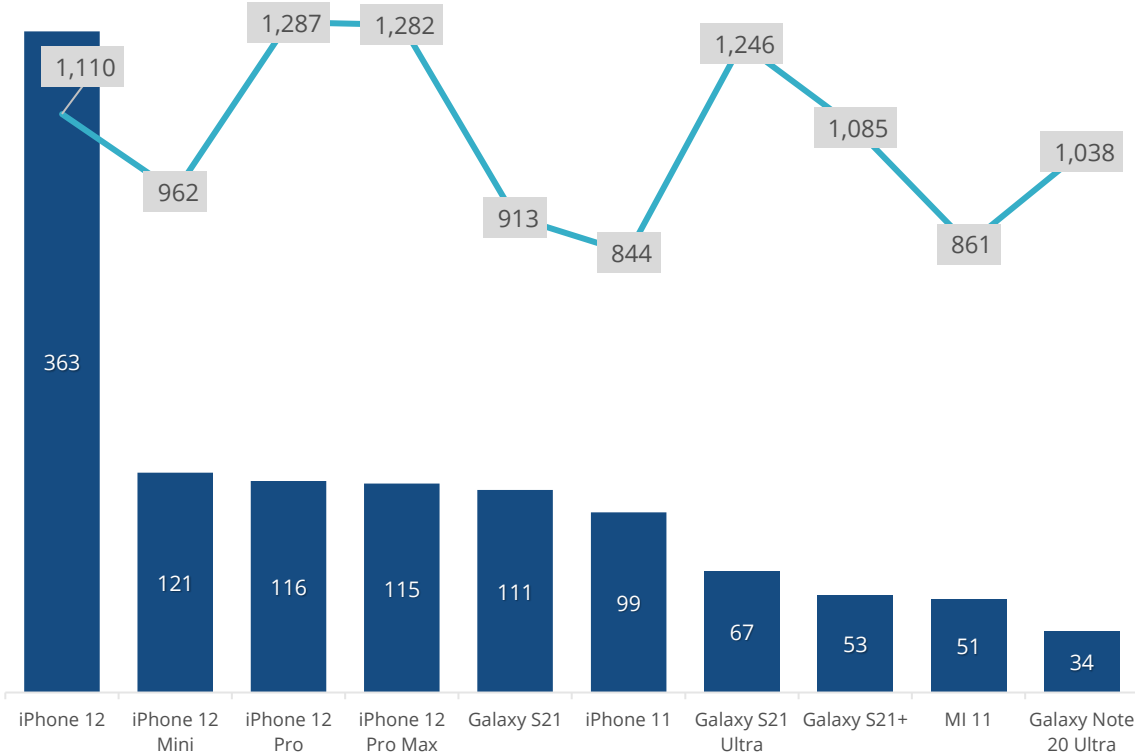


\$600-\$800市场，Moto，小米进入前十， >\$800市场，仅有小米进入

LA Top 10 models in \$600-\$800 market, 2021Q3

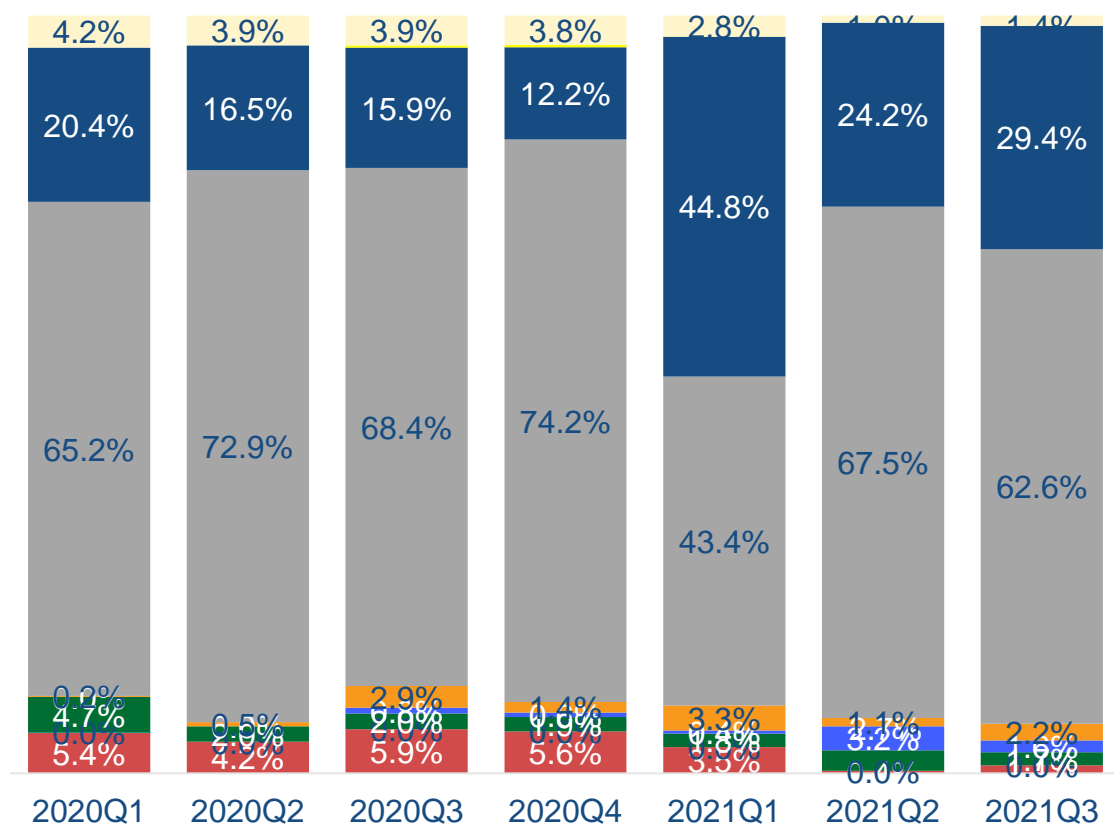


LA Top 10 models in >\$800 market, 2021Q3

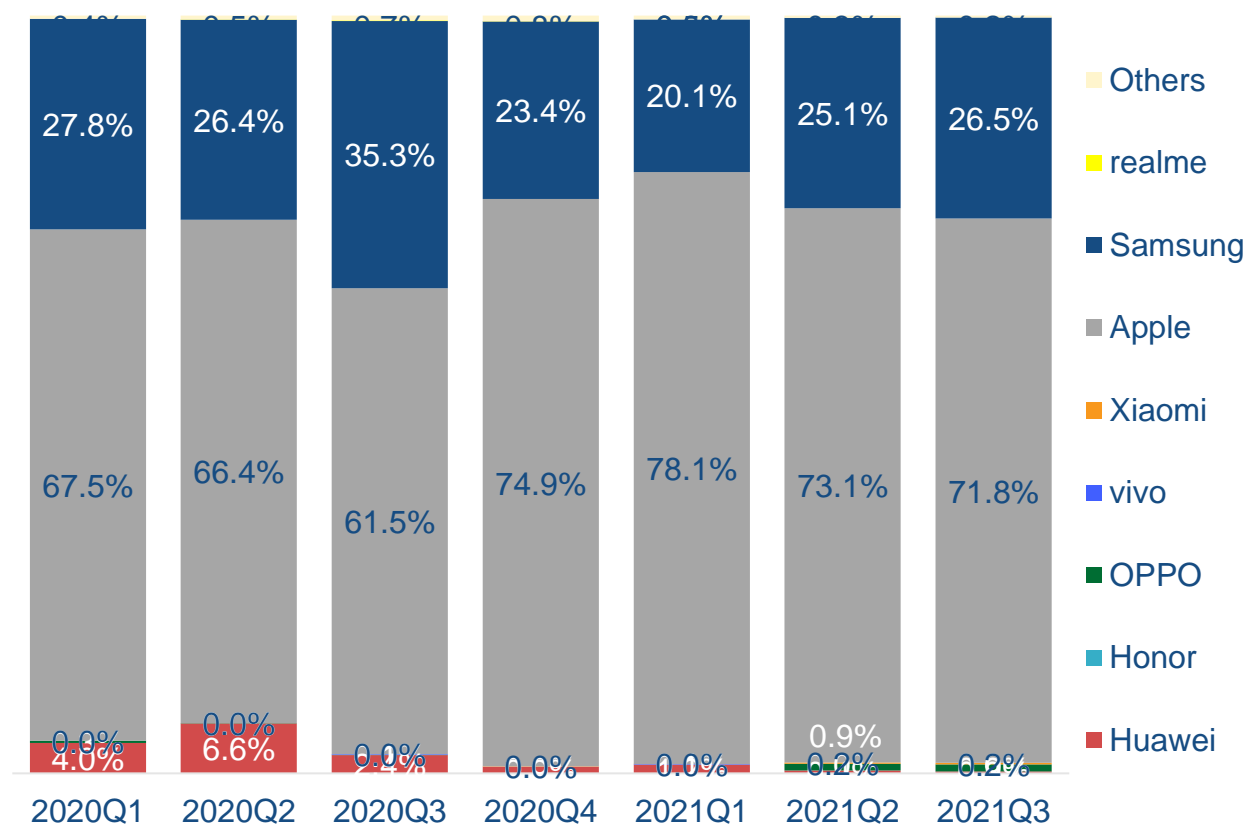


MEA 高端市场 (3.6%) OPPO, xiaomi, vivo均有布局, 但份额小于5%

MEA Smartphone Brand share in \$600-\$800 price bands 20Q1 - 21Q3

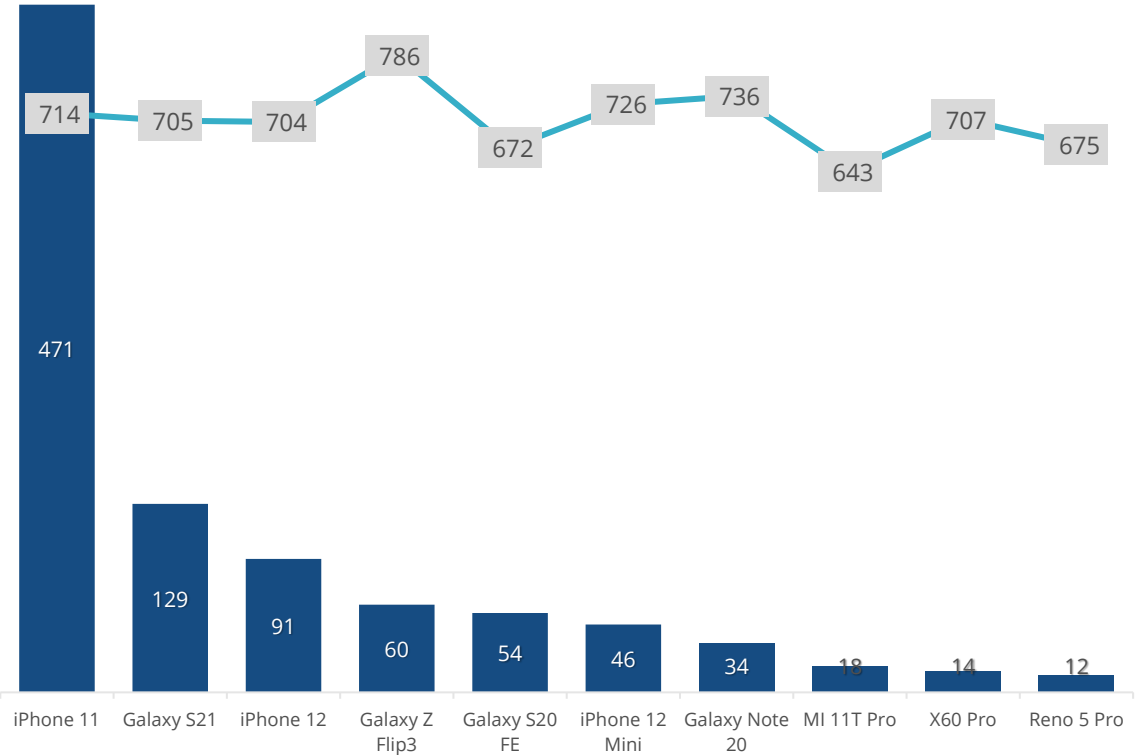


MEA Smartphone Brand share in >\$800 price bands 20Q1 - 21Q3

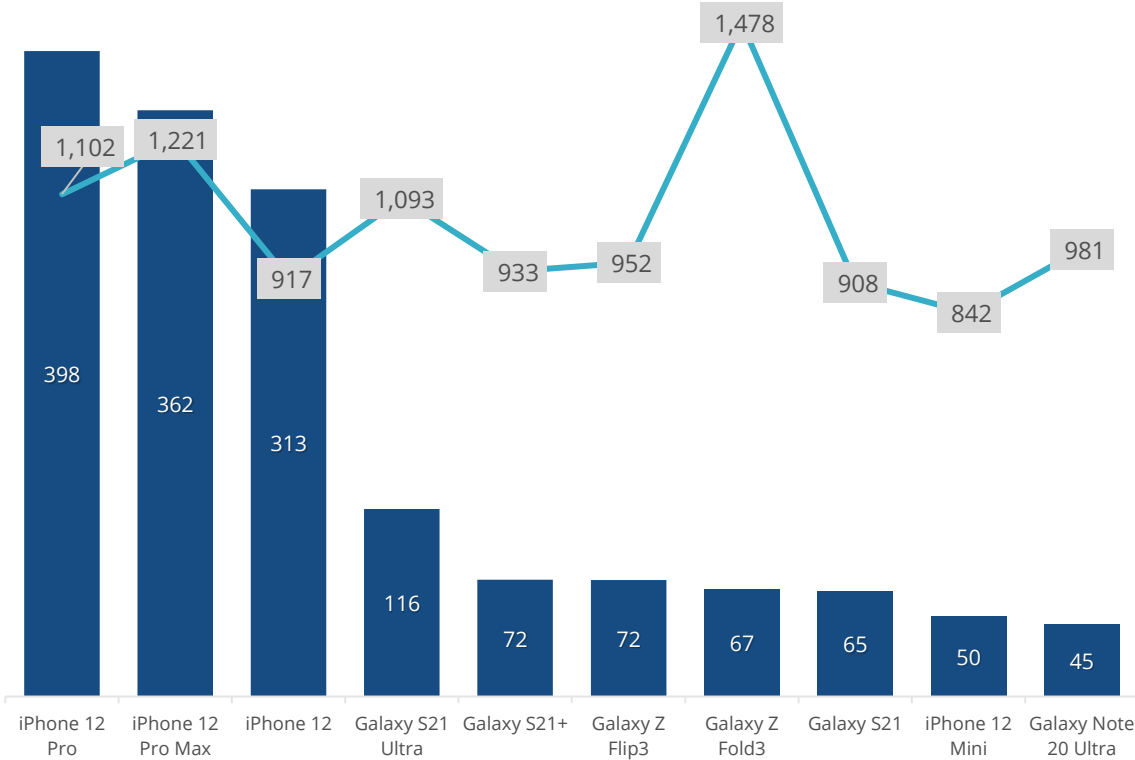


\$600-\$800市场，OPPO, vivo, 小米各有一款进入前十， >\$800市场，三星两款新折叠屏全部进入

MEA Top 10 models in \$600-\$800 market, 2021Q3



MEA Top 10 models in >\$800 market, 2021Q3



- **整体市场概况**

- **国内市场竞争**

- 高端市场

- **海外市场竞争**

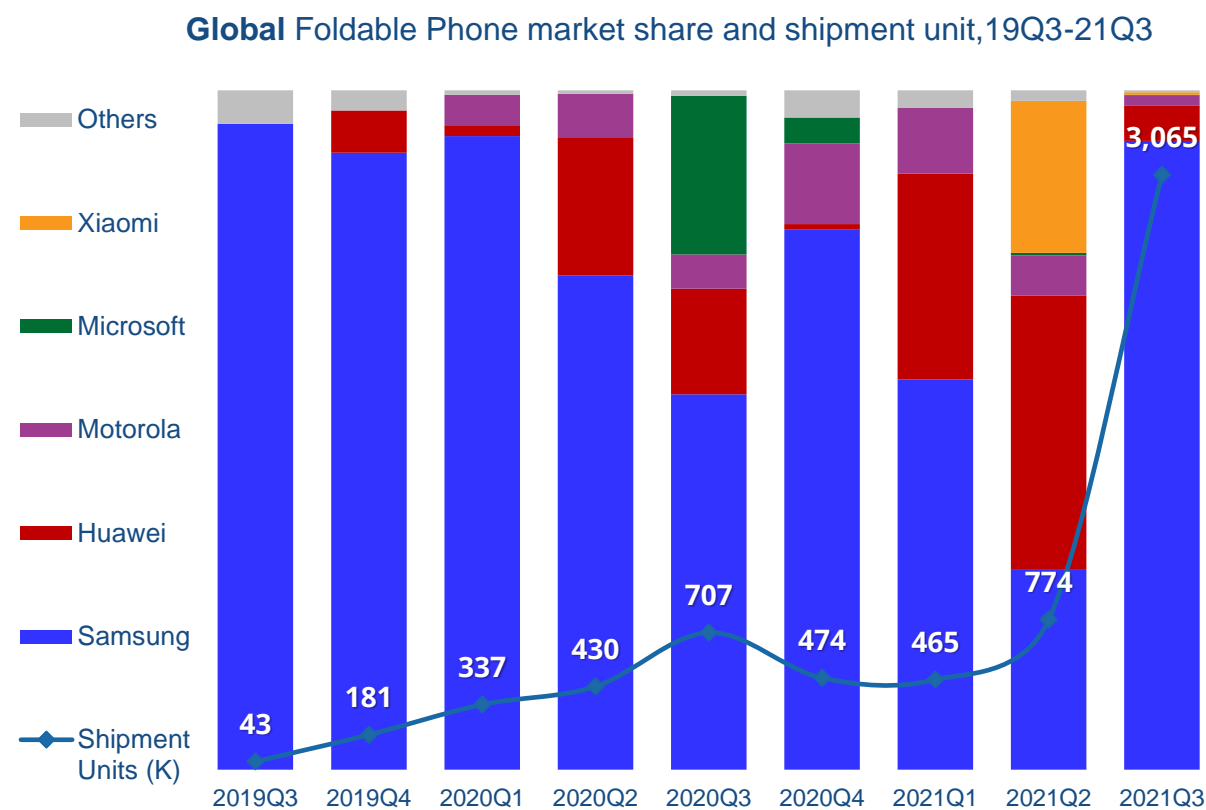
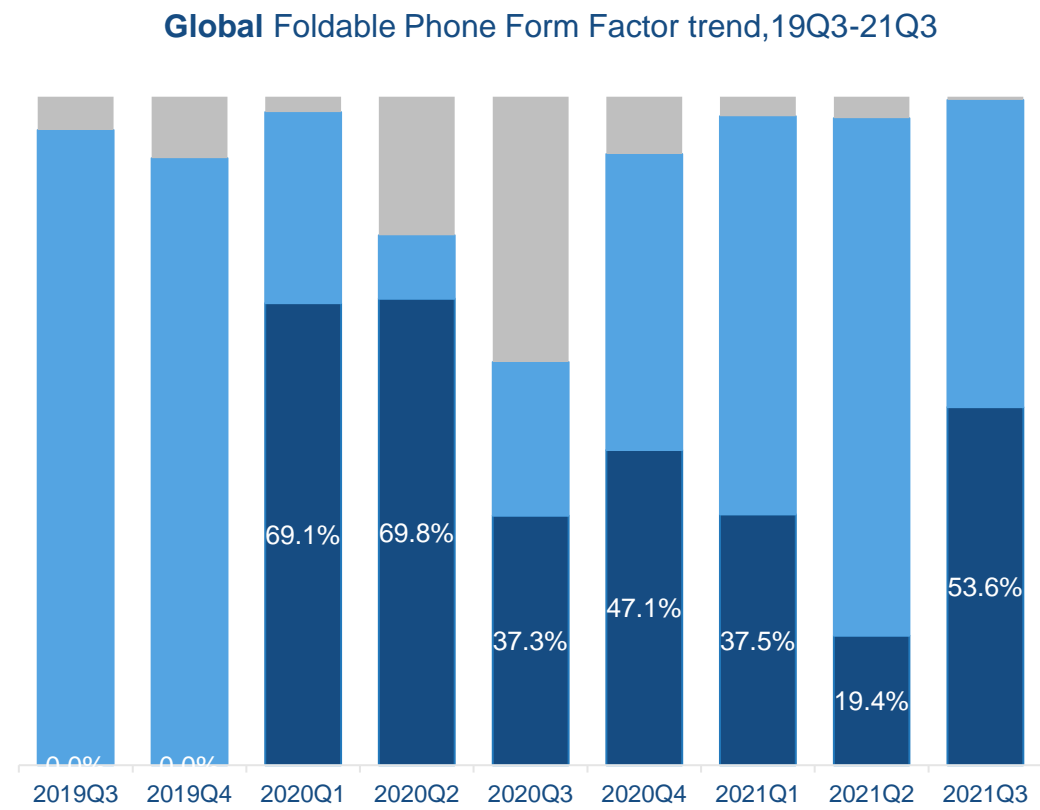
- 高端市场

- **折叠屏**



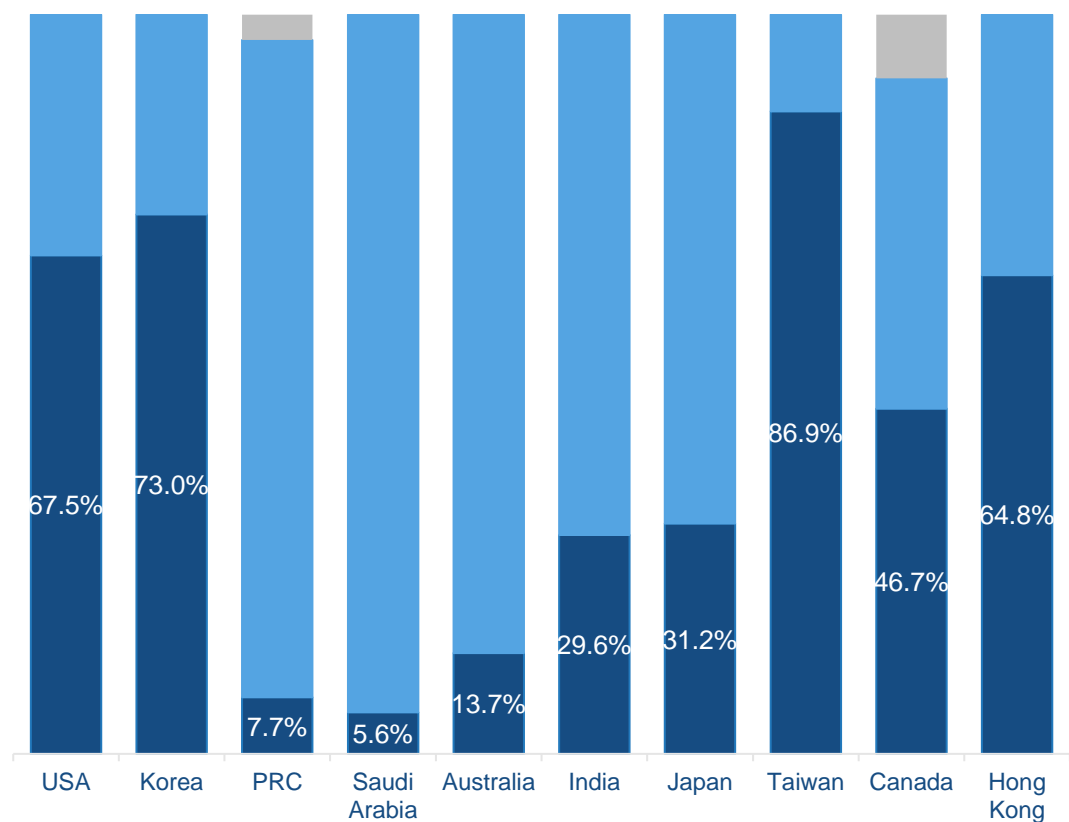
折叠屏市场分析与展望

- ❑ 全球折叠屏市场当前依靠三星引领，H,X均面临各自的问题，O,V持谨慎态度。
- ❑ 2021年三星两款产品：全球折叠模组计划出货**10M**，自身消化约**9M**，**Flip: Fold= 1:1.5~1:2** 组装良率**70-80%**。
- ❑ 预计2021年内全球**~8m**，未来1-2年内折叠屏主流售价有望下探到目前传统高端旗舰的价段。
- ❑ 对于未来预测，**IDC暂时不考虑Apple的影响**，但毋庸置疑，Apple是否进入的确对折叠屏市场的发展至关重要。

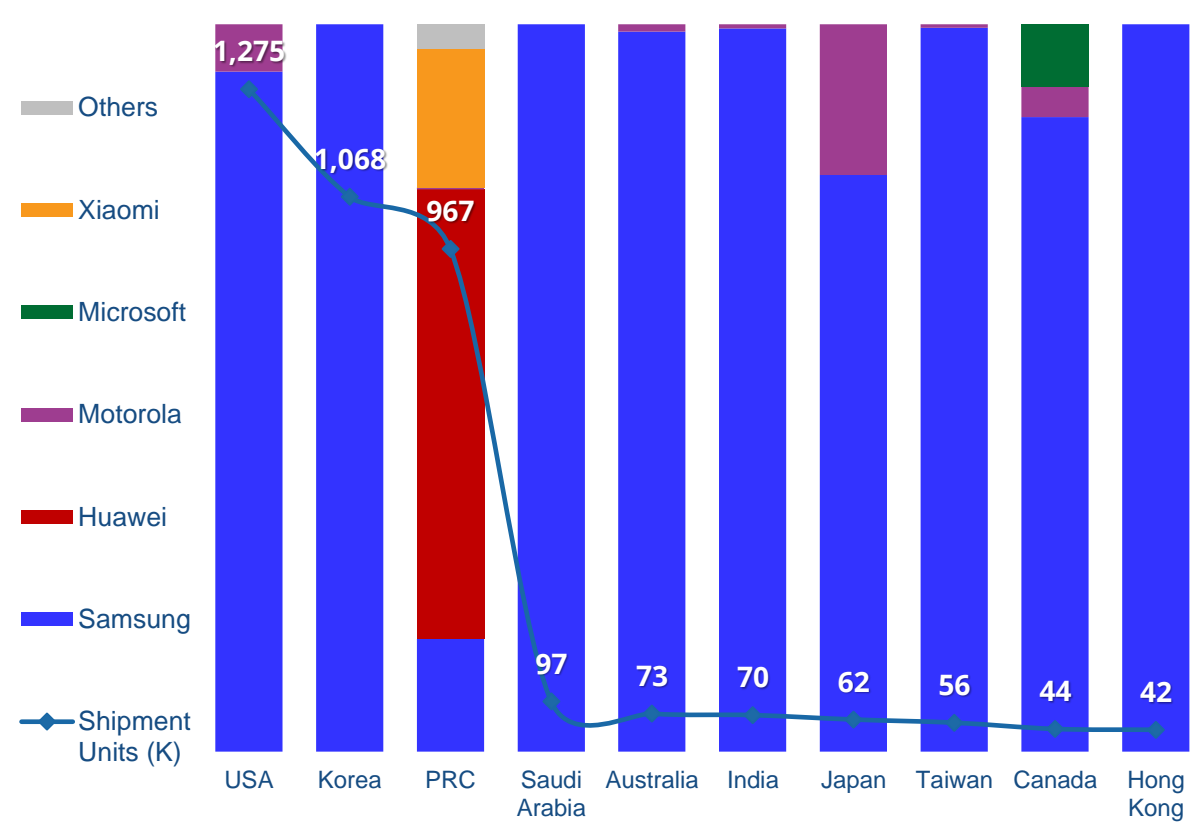


折叠屏市场容量前十国家或地区（87%），美、韩、台、港，前三季度Flip占比更多

Foldable Phone Form Factor share in **Top 10 Countries**, 2021 (by Q3)



Foldable Phone market share in **Top 10 Countries**, 2021 (by Q3)



折叠屏产品用户评价

Galaxy Z Flip3



Galaxy Z Fold3



Mate X2



Find N





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