

# Smartphone Need-To-Know – February 2024

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# Apple overtook Samsung to become the largest smartphone brand of 2023 based on 4Q23 shipment figures

- In 4Q23, the smartphone shipment total reached 328.0 million units. This marks an 8.6% increase compared to 4Q22 and highlights 4Q23 as the first quarter to see a significant increase since 2Q21. This is a sign that the industry is stabilizing after strong smartphone demand between 4Q20 and 3Q21, followed by supply chain problems in 2022. Apart from Samsung, every major OEM recorded year-over-year (YoY) growth. Xiaomi, Transsion, and Huawei had a significant growth of more than 20%.
- With the iPhone 15 series launch, Apple recorded the highest shipment total for 4Q23, with 78.7 million units. This is a 6.5% increase from 2022, when the iPhone 14 series was launched, and the largest quarter for Apple since 4Q21. This success could be down to the resilience of the premium market, which recorded a relatively good performance despite a decrease in overall market demand.
- Samsung recorded 53.2 million unit shipments in 4Q23, a 9.0% fall from 4Q22. This means that Samsung is the only major smartphone OEM with lower shipments every quarter in 2023 compared with the same quarter in 2022, owing to shipping a high proportion of low-end to midrange smartphones, which suffered a significant decline in shipments.
- Major Chinese OEMs recorded a significant decrease in shipments compared to 2022, owing to the smartphone demand slump in China and India.

## Annual smartphone shipments by top 15 OEMs

(millions of units)

Rank	OEM	2023	M/S	2022	M/S	YoY
1	Apple	232.6	20%	231.4	19%	0.5%
2	Samsung	225.3	19%	258.5	21%	-12.9%
3	Xiaomi	146.7	13%	152.2	13%	-3.6%
4	vivo	90.3	8%	97.8	8%	-7.7%
5	OPPO	89.5	8%	99.2	8%	-9.8%
6	Honor	57.1	5%	58.6	5%	-2.6%
7	Motorola	44.6	4%	47.3	4%	-5.6%
8	Tecno	43.3	4%	31.6	3%	37.0%
9	Realme	41.7	4%	52.9	4%	-21.1%
10	Huawei	36.8	3%	28.1	2%	31.0%
11	Infinix	31.8	3%	18.0	1%	77.1%
12	itel	19.6	2%	18.5	2%	5.9%
13	OnePlus	13.0	1%	8.6	1%	49.9%
14	TCL-Alcatel	9.5	1%	8.5	1%	11.5%
15	Google	8.7	1%	8.9	1%	-2.2%
	Others	74.2	6%	87	7%	-14.7%
	<b>Total</b>	<b>1,164.7</b>	<b>100%</b>	<b>1,207.2</b>	<b>100%</b>	<b>-3.5%</b>

Notes: M/S stands for market share.

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Source: Omdia

**“The smartphone business in 2023 was determined by the products and regional markets each brand focuses on. Apple has had success as it focused on the premium market, while Samsung struggled with falling demand for low- to mid-end smartphones. The overall market is expected to return to growth in 2024 but may fall in 2H24 owing to delays in economic recovery, geopolitical instability, and the growing used-phone market.”**

Jusy Hong  
Senior Research Manager,  
Consumer Devices

# Samsung S24 series and Apple Vision Pro excite reviewers on launch

- The new Samsung Galaxy S24, S24+, and S24 Ultra were all released on January 31, 2024. Previously, the consensus of reviewers has been that the S23 Ultra was the best overall large-display premium Android phone available, with many commenting that the S24 Ultra only improves on it further.
  - The upgrades this year includes: seven years of OS and security updates, increased 2,600 nits peak screen brightness, anti-reflection screen coating, Snapdragon 8 Gen 3 with newly added ray tracing, larger vapor cooling chamber, and improved 50MP 5x camera (rather than 10MP 10x).
  - On top of improved hardware, AI features were front and center of the S24 phone launch, with reviewers highlighting the novel photo editing features and circle to search as both convenient and fun.
- The new Apple Vision Pro was launched on February 2, 2024. It has received a lot of media attention for being the brand's first virtual reality (VR) headset and for having new features not seen on other VR headset devices such as the Meta Quest 3.
  - Reviewers particularly highlighted the accuracy of the pass-through display and eye tracking, as well as spatial awareness when placing virtual screens in the environment.
  - Many reviewers noted that use cases for the headset are still limited, with gaming not being as key a feature as it has been on other VR headsets. Apple's Vision Pro also does not connect to iPhones the same way it connects to a Mac to create virtual screens.

**Samsung S24 Ultra in exclusive colors: Titanium blue, green, and orange**



Source: Samsung

**Apple Vision Pro**



Source: Apple

**“The Apple Vision Pro will likely be the most-hyped tech product release of 2024, simply off the back of how new it feels to use compared to other VR headsets. As many have commented, though, this ‘newness’ also means there are limited use cases currently. Many app developers are not committing to releasing a Vision Pro-specific app, including Netflix. So, it will take a number of years for Apple to stock the Vision Pro app store with enough entertainment features and games to justify the \$3,499 price to all but the earliest of adopters.”**

Aaron West  
Senior Smartphone Analyst,  
Consumer Devices

# HMD Global will no longer produce Nokia-branded phones, instead focusing on own-brand devices

- HMD has been selling Nokia-branded phones under license since 2016 but announced on January 31, 2024 that it will be launching its own-brand devices this year—with an expected release at the Mobile World Congress (MWC) Barcelona from February 26–29.
- HMD has previously used the Nokia brand and its legacy to produce affordable and increasingly sustainable phones.
  - In recent years, HMD has started working towards manufacturing smartphones in Europe, making it the first major smartphone company to do so.
  - It has also released new smartphones with a focus on repairability, with the Nokia G22 being one of the first smartphones that can be repaired by consumers. Phone parts, including the screen, charging port, and battery, are available from repair specialist iFixit.
- With its work on European manufacturing and repairability, it is clear that HMD is previously an EU-centered company, focusing on developing in that market. It has also previously committed to making affordable phones. As of yet, it is not clear whether HMD will remain primarily focused on Europe and budget devices, or if its long-term independent strategy is to branch out into more markets and segments.

## New HMD branding



Source: HMD

## Nokia G22, released at MWC 2023 by HMD



Source: HMD


**“HMD reportedly holds the Nokia license until 2026. But by distancing itself from the Nokia brand and trying to create its own independent phones, it seems clear that HMD’s strategy is to not renew the license. Nokia is one of the most famous smartphone brands in the world but is now likely seen as a relic of the past by many consumers. This announcement from HMD can therefore be interpreted as a strategy to build a new brand image as a young, innovative, and environmentally conscious smartphone brand.”**

Aaron West  
Senior Smartphone Analyst,  
Consumer Devices

# Nokia and vivo reach cross-license agreement after dispute over 5G patent

- Following months of legal dispute over Nokia's patent licensing within the European region, vivo has consigned to a multi-year cross license agreement with Nokia and has agreed to catch-up payments to cover the dispute period.
- This agreement covers Nokia's "fundamental inventions in cellular technologies" according to its press release.
- This should allow vivo back into the European market, after it was banned from selling its new phones owing to the pending lawsuit.
- vivo reportedly said the agreement was a sign of "mutual recognition and respect for each other's patent value in cellular technology." It also said that the deal will play a significant role in fostering a "positive development environment within the industry."
- Recently, OPPO also resolved a patent dispute with Nokia, reaching a settlement that follows a series of license agreements in the mobile phone industry.

## Nokia's announcement press release of the 5G agreement with vivo



### Nokia signs 5G patent cross-license agreement with vivo

Nokia signs 5G patent cross-license agreement with vivo

- License covers Nokia's fundamental inventions in cellular technologies
- Nokia to receive payments from vivo for a multi-year period along with catch-up payments to cover the dispute period
- Nokia has now concluded patent license agreements with six major smartphone vendors in the past thirteen months

5 February 2024

Espoo, Finland – Nokia announced today it has signed a multi-year patent cross-license agreement with vivo. Under the agreement vivo will make royalty payments to Nokia, along with catch-up payments to cover the dispute period. The agreement resolves all pending patent litigation between the parties, in all jurisdictions. The terms of the agreement remain confidential as agreed between the parties.

Source: Nokia

**“Even before the licensing dispute, Europe only accounted for a small portion of Chinese OEM vivo’s shipments. In 2021, it peaked at 4.1 million units in Europe over the year, or 3.0% of its global shipments. In 2022, this fell to 1.5 million units, or 1.5% of its global shipments. Europe, particularly Western Europe, remains a target market for many Chinese OEMs owing to the strong premium phone demand—a segment that is resilient to economic downturns and tends to have higher profit margins.”**

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# Appendix

# Appendix

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