# The Mobile Device Market in Key Countries

## Cote d'Ivoire

## Kenya

## Nigeria

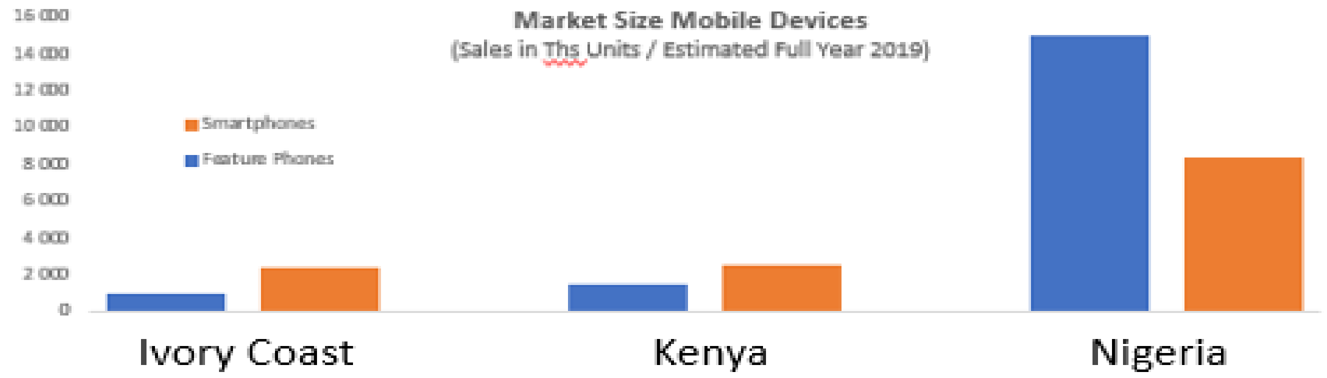
### Smartphones

The **mobile device market** across three key African countries shows significant growth in smartphones. In **Kenya smartphones** sales are expected to reach **>3.5 million** devices in **2019**, for **Cote d'Ivoire** the estimated market size is **2.0 million** and for **Nigeria** smartphones are geared towards **>8.5 million** handsets for the full year 2019. The latter country also tops the continent's subscriber base at over 173 million active SIMs; in comparison Kenya has almost 50 million subscribers and Cote d'Ivoire has over 35 million. The subscriber number is obviously linked to the adult population in each country which benefits Nigeria as the most populous of the three.

But the number of subscribers is also being fuelled by the popularity of **dual SIM** devices in these countries. Most of the active SIMs are installed in handsets that offer 2 card slots, furthermore users tend to have SIMs in reserve that are only used occasionally and hence not installed permanently in a device thus growing the SIM subscriber numbers.

### Dual SIM

To what extent does **dual SIM** impact the subscriber numbers when compared to countries like South Africa where most devices are single SIM? For example in **Nigeria** between January and May 2019 **94%** of all sold mobile devices including feature phones offered dual SIM capability. For **Kenya**, the share of dual SIM sits at **84%** and in **Cote d'Ivoire** the share was slightly lower at **83%**. The high share of dual SIM is a strong indicator that consumers in these countries see the benefit of being able to change between SIM easily either because of network coverage or to take advantage of specific data or voice promotions.




### Teledensity

Another measurable often used is **teledensity**, basically the number of active connections versus the population. In this case **Cote d'Ivoire** tops the comparison at **130%**, followed by **Nigeria** at **91%** and then **Kenya** at **86%**. Again Dual SIM impacts these numbers and in real terms the share of active handsets (not active SIM cards) is significantly lower. As a benchmark the **South African** market has almost 98 million subscribers combined with a very high teledensity of **162%** but a very low dual SIM install base.

What does this mean for Nigeria, Kenya and Cote d'Ivoire? Unlike the stagnating South African device market these three countries are far away from saturation and are poised for growth. Another interesting growth factor is the transition from feature phones to smartphones.

### Feature Phone to Smartphone Transition

For the time being this **transition** is **positive**: The growth of smartphones outweighs the decline in feature phones. Having said this the market for feature phones will remain important for the foreseeable future. Price sensitive consumers may not be able to afford the latest smartphone, rural consumers tend to prefer feature phones any ways. Also the battery life is a critical factor and many users combine a smartphone for internet and social media use with a feature phone due to their outstanding battery life.

The decline in feature phone sales is therefore a very gradual process and for example in **Nigeria** they still make up the majority of sales; in 2019 the total number of feature phone sales is forecasted at **>15 million** units. The same applies to **Kenya** with **>2.5 million** and **Cote d'Ivoire** with **>0.9 million** estimated sales. Although unlike Nigeria in the latter two countries smartphones already make up the majority of sales while for Nigeria this quantum leap is expected to happen latest in Q4 of this year.