



Device Model Adoption & Performance Benchmarking






Agenda

1. Market Dominance: Brand Concentration
2. Top Individual Models
3. Performance Paradox: Speed vs. Price
4. Regional Adoption & The Digital Divide
5. Operator-Specific Device Adoption
6. The 5G Device Impact
7. Strategic Summary

Market Dominance: Brand Concentration

Nigeria's device landscape remains a market of established giants, though emerging brands are successfully carving out larger niches.

- **Consolidated Leadership:** Samsung and Apple continue to lead, collectively controlling 59.2% of the national market as of March 2026.
- **Samsung's Reach:** Samsung maintains the top position with a 37.8% market share, a slight consolidation from the 39.0% held in August 2025.
- **Apple's Footprint:** Apple secures second place with 21.4%, down from 25.4% in the previous period.
- **The Rise of Tecno:** Tecno has shown significant growth, increasing its share from 10.9% in August 2025 to 14.2% in March 2026.
- **Xiaomi's Expansion:** Xiaomi's popularity grew from 6.0% to 7.8%, reflecting consumer demand for feature-rich, affordable handsets

Manufacturer	Aug 2025 Share (%)	Mar 2026 Share (%)	Delta
Samsung	39.0%	37.8%	 -1.2%
Apple	25.4%	21.4%	 -4.0%
Tecno	10.9%	14.2%	 +3.3%
Xiaomi	6.0%	7.8%	 +1.8%
Huawei	8.0%	7.0%	 -1.0%

Top Individual Models*

SPEEDTEST

While brands compete for share, individual model preference reveals a strong appetite for 5G-capable technology.

- The National Champion: The Huawei Mate 40 Pro 5G remains the single most adopted device model across all major operators.
- Premium Demand: Apple's Pro Max series (iPhone 12 through 15) dominates the high-end segments on MTN, Glo, and Airtel.
- Entry-Level Shift: The Redmi 14C and 13C emerged as top national models in 2026, indicating a growing influence of Xiaomi

Rank	Device Model	Total Tests (Adoption)
1	Huawei Mate 40 Pro 5G	125,444
2	iPhone 12 Pro Max 5G	47,302
3	Redmi 14C	46,237
4	iPhone 14 Pro Max	40,261
5	Galaxy S24 Ultra	39,321

*Based on number of Speedtest tests

Performance Paradox: Speed vs. Price

One of the most significant findings challenges the idea that you must pay more for better speed.

- The Speed Leader: The mid-range Nothing Phone (2) leads the market with a median download speed of 249.3 Mbps.
- The 2025 Champion: In August 2025, the mid-range Galaxy A26 held the top spot at 244.3 Mbps.
- Uplink Efficiency: The Huawei Mate 60 Pro provides the highest upload efficiency in the latest report at 64.6 Mbps.

Device Model	DL Speed (Mbps)	UL Speed (Mbps)	Latency (ms)
Nothing Phone (2)	249.3	35.6	42.7
Mi 10T Pro 5G	212.7	30	42.2
iPhone 17 Pro Max	189.3	21.9	39.7
Mate 60 Pro	170.6	64.6	29.2

Regional Adoption & The Digital Divide

Infrastructure remains unevenly distributed across the six geopolitical zones.

- Infrastructure Leader: The South West region consistently leads in performance, with a median download speed of 20.86 Mbps.
- The Gap: Urban areas maintain a speed advantage over rural regions, growing from 1.3x in 2025 to 1.45x in 2026.
- Rural Struggles: Rural users face an average latency 8.0 ms higher than urban users as of March 2026

Geopolitical Zone	Median DL (Mbps)	Median UL (Mbps)	5G Penetration (%)
South West	20.86	11.5	18.50%
North Central	19.6	12.09	16.40%
South	19.52	10.74	12.50%
North West	17.2	13.65	16.50%
South East	17.05	12.09	11.40%
North East	14.47	11.69	11.10%

Operator-Specific Device Adoption

Each carrier has a "signature" device profile that defines its market segment.

- **MTN & Airtel:** Primarily driven by 5G flagships (**Huawei Mate 40 Pro** and **iPhone 13/14/15 Pro Max**).
- **Glo:** A highly diverse mix including the **Galaxy A16** and **Tecno Spark 20**, showing a focus on the mass market.
- **T2:** Shows unique loyalty to specific models like the **Galaxy S8** and the **Galaxy Z Fold** series.

Operator	Top Adopted Model	Second Most Adopted
MTN	Huawei Mate 40 Pro 5G	iPhone 12 Pro Max 5G
Airtel	Huawei Mate 40 Pro 5G	Redmi 14C
Glo	iPhone 12 Pro Max 5G	Galaxy A16
T2	Galaxy S8	Galaxy A12

The 5G Device Impact




Adopting a 5G-capable device is the single biggest factor for a superior user experience in Nigeria.

- **The 5G Jump:** Users switching from 4G to 5G devices on **MTN** see an average speed increase of **561%**.
- **Airtel 5G Performance:** High-end 5G devices on Airtel reach a median of **193.1 Mbps**.
- **Low Adoption:** Despite the performance, only **3.7%** of active devices nationally are currently utilizing 5G networks.

Device Tier	Median DL (Mbps)	Median UL (Mbps)	Latency (ms)
High-End (5G)	160.4	10.92	26.5
Mid-Range	20.15	13.06	31
Low-End	11.02	11.75	42

Strategic Summary

- Value is Winning: Mid-range devices like the Nothing Phone (2) and Xiaomi models are providing better "Speed-per-Naira" than traditional flagships.
- 5G Readiness: While adoption is low (3.7%), the performance gap (5x speed increase) will drive a massive migration to 5G handsets in late 2026.
- Rural Focus: Future distribution should focus on affordable 4G/5G hybrids to close the widening urban-rural gap (1.45x difference).

KPI	Aug 2025	Mar 2026	Trend
Fastest Device	244.3 Mbps	249.3 Mbps	 Improving
Best Latency	20.5 ms	14.3 ms	 Improving
5G Adoption	4.30%	3.70%	 Fluctuating

Thank You