Nigeria: Intensifying Price Competition and Further Frequency Spectrum Acquisitions to Drive Telecom Market

Description:
Summary
The report estimates Nigeria's total telecom services revenue reached an estimated $7.9bn in 2015, a 17.0% decrease from the previous year. The decline in the overall market size is, however, purely due to devaluation of the Nigeria naira to the US dollar. In local currency, the total telecom services revenue actually grew by 2.1% from 2014, to reach N1.5trn in 2015. Mobile voice services revenue contributed the largest segment of overall revenue, at an estimated 70.0% in 2015. Over the next five years, overall services revenue is forecast to grow at a 2.0% CAGR in dollar terms (8.3% in local currency terms) to reach $8.7bn (N2.3trn) in 2020. This will largely be driven by rapid growth in mobile data revenue, which is forecast to increase at a CAGR of 12.6% between 2015 and 2020, to reach $3.1bn (or 35.5% of overall services revenue) in 2020.

Key Findings
- MTN Nigeria is expected to maintain its market leading position in terms of total mobile subscriptions and revenue over the forecast period. However, the operator’s market share will progressively decline due to increasing competitive pressure from other operators following significant network expansion and upgrades and increased price competition. In 2020, forecasts MTN Nigeria's share in terms of total services revenue to reach 44.3% (from an estimated 50.1% in 2015) and a mobile subscriber share of 35.0% (from an estimated 41.2% in 2015).

- The author forecasts 3G subscriptions to reach 81.3m or 38.6% of the mobile subscription base in 2020 owing to increased price competition for mobile data as a result of the recent removal of regulation on minimum prices for mobile data services. LTE subscriptions will reach 9.3m, or 4.4% of all mobile subscriptions in 2020, driven by operators' focus on 4G launch as the NCC plans to auction spectrum allocations for 4G services in 2016.

- Fixed services revenue contribution to overall revenue is expected to remain marginal over the forecast period (expected to reach 9.9% in 2020, from an estimated 8.4% in 2015); this is due to challenges related to the lack of fixed broadband infrastructure and low demand by the consumer segment given cheaper mobile service substitutes.

Synopsis
“Nigeria: Intensifying Price Competition and Further Frequency Spectrum Acquisitions to Drive Telecom Market” provides an executive-level overview of the telecommunications market in Nigeria today, with detailed forecasts of key indicators up to 2020. It delivers deep quantitative and qualitative insight into the telecom market of Nigeria, analyzing key trends, evaluating near-term opportunities and assessing risk factors, based on proprietary data from the databases. It provides in-depth analysis of the following:

- Nigeria in a regional context; a comparative review of market size and trends with that of other countries in the region.

- Economic, demographic and political context in Nigeria.

- The regulatory environment and trends; a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans and more.

- A demand profile; analysis as well as forecasts and historical figures of service revenue from fixed telephony, broadband, mobile voice, data and pay-TV markets.

- Service evolution; a look at the change in the breakdown of overall revenue by fixed, pay-TV and mobile sectors and by voice, data and video in the current year as well as the end of the forecast period.

- An in-depth sector analysis of fixed telephony and broadband services, mobile voice, data services and pay-TV; a quantitative analysis of service adoption trends by technology/platform as well as operator, average
Revenue per line/subscription and service revenue through the end of the forecast period.

- Main opportunities; this section details the near-term opportunities for operators, vendors and investors in the telecommunications market in Nigeria.

Reasons To Buy
- Provides an overview of the Nigerian telecom market through a combination of quantitative and qualitative insights. The graphical information consists of more than 20 charts and tables derived from forecast products.

- Build profitable growth strategies by leveraging the analysis which includes an examination of current player strategies and the future trends of the Nigerian telecommunications market.

- Understand the factors behind ongoing and upcoming trends in Nigeria's mobile communications, fixed telephony, broadband and pay-TV markets, including the evolution of service provider market shares, to align product offerings and strategies to meet customer demand.

- Gain insights on key telecom players in the market and their strategies to grow market share.

- Explore novel opportunities to align your product strategies and offerings to meet customer requirements and succeed in the challenging telecommunications market in Nigeria.

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