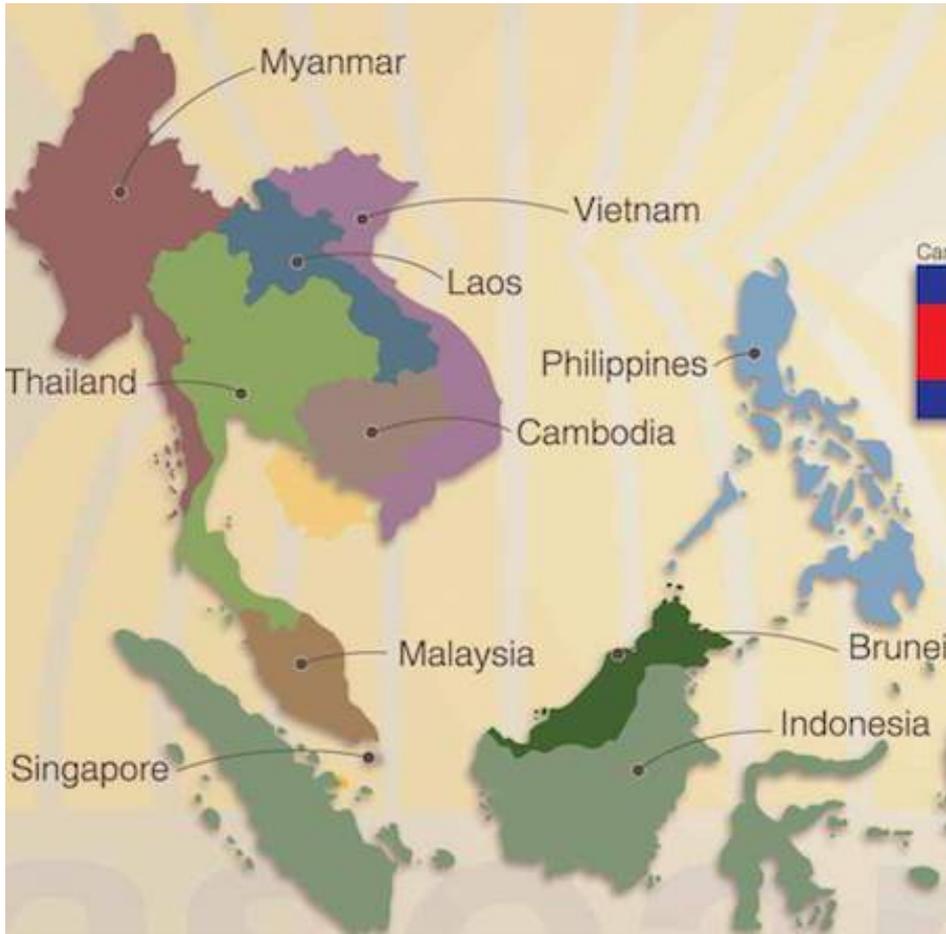


SEA market update: Malaysia falls, Myanmar booms

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The close of 2016 saw a number of significant shifts in operator rankings across many countries in Southeast Asia.

The biggest change was in the **Philippines**, where [Globe Telecom moved ahead of incumbent Smart](#) after adding more than 10 million connections and expanding its market share by 4 percentage points to lead with a 52 per cent share (see table below, click to enlarge). Due to subscriber losses at rival Smart, the overall Philippines market grew just 6.2 per cent during the year, according to GSMA Intelligence.

Malaysia was the only market in the region to contract (down 0.9 per cent year-on-year), with Maxis and Celcom losing 600,000 and 800,000

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Country/operator	Market share Q416	Market share Q415	Total subs Q416	Total subs Q415	Net change YTD	Change y-on-y
Philippines			128.7M	121.2M	7.5M	6.2%
Globe Telecom	52%	46%	66.6M	56.2M	10.4M	18.5%
Smart (PLDT)	48%	53.3%	62.1M	65M	2.9M	-4.5%
Malaysia			41.9M	42.3M	-0.4M	-0.9%
Maxis	28.1%	29.5%	12.1M	12.7M	-0.6M	-4.7%
Digi	28%	27.5%	12M	11.8M	0.2M	1.7%
Celcom	26.9%	28.5%	11.5M	12.3M	-0.8M	-6.5%
U Mobile	11.5%	9.7%	4.9M	4.2M	0.7M	16.6%
Yes (YTL)	3.3%	3%	1.4M	1.3M	0.1M	7.7%
Myanmar			50.6M	37.5M	13.1M	34.9%
MPT	43.5%	48%	22M	18M	4M	22.2%
Telenor	37.5%	36.5%	19M	13.7M	5.3M	38.7%
Ooredoo	19%	15.5%	9.6M	5.8M	3.8M	65.5%
Indonesia			368.6M	337.9M	30.7M	9.1%
Telkomsel	44.4%	44.9%	165M	152.6M	12.4M	8.1%
Indosat	22.2%	20.4%	82.3M	69.5M	12.8M	18.4%
3 (Hutchison)	18%	18.7%	66.3M	63.6M	2.7M	4.2%
XL (Axiata)	12%	12.1%	44.6M	41.2M	3.4M	8.3%
Smartfren	2.8%	3.3%	10.4M	11M	-0.6M	-5.5%
Thailand			88.2M	82.9M	5.3M	6.4%
AIS	44.5%	45.4%	40.4M	38.5M	1.9M	4.9%
dtac	27.3%	29.8%	24.8M	25.3M	-0.5M	-2%
True	25.3%	22.5%	23M	19.1M	3.9M	20.4%
Vietnam			121.1	117.2	3.9M	3.3%
Viettel	41.1%	41.6%	51.3M	50.1M	1.2M	2.4%
Mobifone	37.3%	37.7%	46.5M	45.3M	1.2M	2.6%
Vinaphone	15.1%	14.9%	18.8M	17.9M	0.9M	5%
Vietnamobile	3.6%	3.2%	4.5M	3.9M	0.6M	15.4%

Source: GSMA Intelligence

subs rose nearly 17 per cent, while its market share increased by 1.8 points to 11.5 per cent.

Myanmar was again the fastest growing market in Southeast Asia, expanding 35 per cent year-on-year in 2016. The country's three operators **picked up 13 million new customers** taking its mobile user base to 50.6 million and SIM penetration to 69 per cent.

State-run MPT registered the slowest growth and saw its market share fall 4.5 points to 43.5 per cent (it had a 100 per cent share in Q2 2014 when the country opened up to foreign competition). Despite increasing its connections by nearly 39 per cent, Telenor Myanmar added just 1 point to its market share, which closed the year at 37.5 per cent. Ooredoo Myanmar's customer base grew 66 per cent and it added 4.5 points to give it a 19 per cent share, according to GSMA Intelligence.

Indonesia, the largest market in the region with nearly 370 million connections, continued to experience strong growth, increasing 9 per cent year-on-year, driven largely by operators' push to expand their 4G networks. Number two Indosat reported the fastest growth, up 18.5 per cent, and took market share from the other four players, which all saw their shares slip slightly. Fourth ranked XL returned to subscriber growth after a couple of years of losing market share to Indosat and 3, growing 8.3 per cent – about the same rate as market leader Telkomsel.

Thailand was a mixed bag with the market growing 6.4 per cent overall, but number two dtac suffering a 2 per cent drop in mobile connections while number three True grew 20 per cent and gained nearly 3 points on the Telenor unit. Market leader AIS added nearly two million connections, up 5 per cent, but its market share dropped almost a point to 44.5 per cent from a year ago.

Vietnam had an uneventful year, growing just 3.3 per cent to close the year with 121 million connections. The four major players' market shares changed less than 1 percentage point. Vietnamobile, the smallest operator with a 3.6 per cent share, was the only telco to post double-digit growth after boosting its subs by 15 per cent.

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