Counterpoint

Counterpoint Quarterly – Smartphones Q2 2025

June 2025

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How Smartphone OEMs Can Stay Competitive in Era of AI Agents

- *AI agents are trending, with smartphone OEMs seeing them as the next user interface.*
- *Multiple AI agents will coexist on future smartphones. Internet giants would likely develop their own agents alongside OEMs' versions to serve their ecosystems.*
- *Smartphone OEMs will collaborate more closely and drive traffic to longtail service providers and app developers.*
- *Distributing AI agents presents a new monetization opportunity. OEMs should make initial investments to support an open AI agent ecosystem to compete against internet giants.*

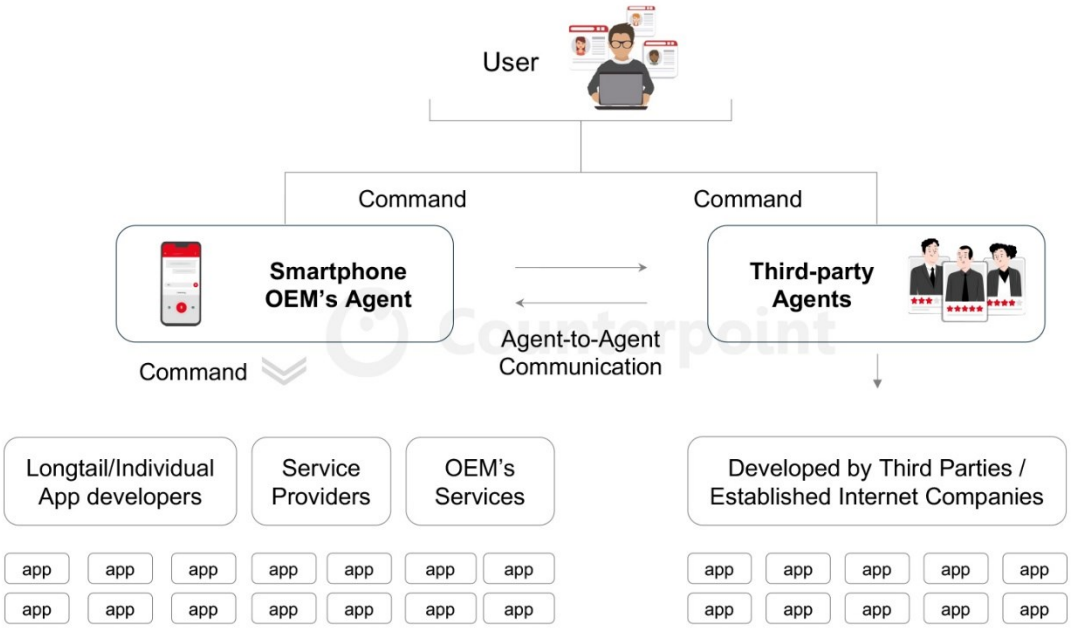
AI agents are reshaping the global tech landscape. These intelligent assistants don't just answer questions; they take action. Though there are dozens of definitions for an AI agent, the consensus is clear that an AI agent should execute tasks based on simple user prompts.

Imagine telling your smartphone to "find a place with a good vegan menu" and it not only books a table but pre-orders your meal. AI agents will fundamentally change how we interact with devices, replacing today's graphic-based user interface (UI).

This is why the slogan "AI is the new UI" is gaining momentum. AI agents will become the primary layer between users and applications (or services), shaking up the operating system dominance of smartphone OEMs.

Rise of AI agents and shifting power struggle

In the future, multiple AI agents are expected to coexist on a single smartphone, serving as gateways to apps and services. Smartphone OEMs will push their own agents, but third-party developers will introduce alternatives, leading to a multi-agent ecosystem. Crucially, AI agents won't operate in isolation; they will communicate and coordinate on tasks in the background.



Source: Counterpoint Research

Big tech companies like Meta, Tencent and ByteDance are poised to leverage AI agents to reinforce their ecosystems. Meta's agent might only message contacts via WhatsApp, while Tencent's could book a ride exclusively through Didi, a company it backs. These closed-loop ecosystems would lock users into their own systems and realize their ambition of controlling a "super app" that covers all aspects of people's lives. This would also shift control away from smartphone brands.

OEMs at risk: From industry leaders to hardware assemblers

This shift threatens to upend the mobile ecosystem's value chain. Today, OEMs hold significant sway over app distribution, especially in China, where Google Mobile Services (GMS) are absent. But in an AI-driven world, if OEMs fail to take the lead, they risk becoming mere hardware assemblers, with little control over software, services, or revenue streams.

This is why smartphone brands are racing into AI. Their own AI agents will act as intermediaries, directing user requests to partners they choose – not just to dominant internet platforms. This opens opportunities to collaborate with rising-star startups that want independence from big tech but need traffic to grow. For OEMs, AI agents could become a powerful monetization tool. When an OEM's AI agent receives command, it could call on or recommend a start-up's services which could be comparable to those of internet companies.

Next opportunity: AI agent marketplaces

A new frontier is emerging – AI agent distribution. Users won't just download apps; they will choose AI agents tailored to their needs. Some may prefer an AI assistant designed for emotional support, while others might opt for one that excels in logic and reasoning. This shift allows OEMs to reinvent app stores as agent marketplaces, controlling how AI-driven services are deployed.

To seize this opportunity, OEMs must invest now in an open AI ecosystem. They should back independent AI startups and ensure seamless integration of third-party agents into their devices. By doing so, they can counteract closed ecosystems built by internet giants and regain leverage in the mobile industry.

The battle for AI agent dominance is just beginning, and the stakes couldn't be higher. The brands that invest now will define the future of mobile computing. Those that hesitate will be left assembling devices for someone else's ecosystem.

Counterpoint Conversations: Samsung's Agentic AI Strategy for Seamless, Secure, and User- centric Interactions

Samsung, the global consumer electronics and smartphone giant, took the early mover advantage in the AI race by bringing the first and most advanced GenAI smartphones to the market. The brand worked closely with its key partners Google and Qualcomm to bring 'on-device' as well as 'cloud-based' hybrid AI experiences to its consumers. However, the AI development trajectory is now moving from GenAI and entering the Agentic AI era.

From that perspective, we were fortunate to take a seat with Patrick Chomet, Executive Vice President at Samsung's MX (Mobile Xperience) division, for a "Counterpoint Conversation" discussing Samsung's AI journey and Galaxy AI becoming a benchmark for the industry.

The Interview:

https://www.youtube.com/watch?v=FO_Da1t1ZVw

Key Takeaways from the Discussion:

Samsung's approach to design in the AI era focuses on holistic user experiences, where hardware and software are seamlessly integrated to enhance simplicity and add value.

Samsung's One UI is transforming into a multimodal AI UI with the direction to make every interaction powered by intelligence. Galaxy AI is becoming a common factor across Samsung's huge hardware ecosystem from smartphones, tablets, laptops, smartwatches, smart ring, TVs, and appliances, making it intelligent and personalized.

The security and privacy-focused personalization and interaction between users and devices or among devices, leveraging its Knox solutions, is another differentiating factor for Samsung.

Samsung has several AI and GenAI features baked into the new S25 series intelligent information retrieval, enhancing communication, such as real-time translation and efficient multimedia editing.

Analyst Take:

Global GenAI smartphone shipments are estimated to *exceed 400 million units in 2025* and jump to 726 million in 2026.

According to our recent *GenAI survey*, 73% of users have accessed GenAI through their smartphones. Meanwhile, 67% of US respondents plan to upgrade to a GenAI smartphone, the highest globally. Germany and France had the next best numbers, respectively.

In the Android camp, Samsung continues to dominate with a lion's share in the premium GenAI-capable smartphone segment. Its Galaxy AI will also likely trickle down to the mainstream Galaxy A series in 2025 and 2026.

Apple has shown some promise with Apple Intelligence. However, the rollout has been limited – feature-wise and geographically. A major differentiator for Galaxy AI is that it is powered by a more advanced Google Gemini AI. Samsung has taken significant strides with its on-device AI capabilities in partnership with Qualcomm.

Samsung also has another advantage – smartphone x productivity x wearables x home play with Galaxy AI making it more scalable and powerful.

Samsung also has its work cut out to see how seamless the Galaxy AI would be across its ecosystem and how closely Samsung, Google and Qualcomm work with application developers to drive on-device AI experiences that are personalized with privacy in mind.

Read More

- ***How Smartphone OEMs Can Stay Competitive in Era of AI Agents***
- ***GenAI Smartphone Shipments to Exceed 400 Million in 2025, Capturing One-third of Global Market***
- ***Memory Solutions for Generative AI Part 4: Smartphone***
- ***NVIDIA GTC 2025: GPU, Tokens, Collaborations***
- ***MWC 2025 Trend Predictions: 5G + GenAI = Profit?***
- ***DeepSeek's New Efficient AI Models Challenge Industry's High-cost Paradigm***

Counterpoint Quarterly Q1 2025: Smartphones

Counterpoint Quarterlies aggregate important notes we've published during the past three months – all organized by research area.

Counterpoint Quarterly Q1 2025: Smartphones

The Smartphones edition brings together all of our Smartphones-related notes from Q1 2025. It offers a comprehensive collection of data, insights, and a deeper analysis of the key thoughts and perspectives from our analysts throughout the quarter.

PDF | 75 pages

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- Consumption Subsidy Ignites China Smartphone Market in Q1 2025
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- Apple Reaches New High in Global Refurbished Market in 2024, But Supply Remains a Challenge
- MEA Smartphone Shipments Fall 6% YoY in Q4 2024 as Economic Challenges Persist
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- Japan’s Smartphone Sales Rise 7% YoY in 2024; Strong Growth Projected for 2025
- Q4 2024 Rounds Off a Good Year for Europe’s Smartphone Market; Shipments Up 4% YoY
- OPPO Find N5 Launch: New Slimness Benchmark for Foldables
- LATAM Smartphone Shipments Sustain Growth for Sixth Consecutive Quarter
- Global Smartwatch Shipments in 2024: Market Declines for First Time, China Leads for First Time
- Shipments of ‘Made in India’ Smartphones Grew 6% YoY in 2024 Amid Record Exports
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- Foldable Smartphone Market to See its First Decline in 2025 Before Robust Comeback in 2026
- China’s Secondary Smartphone Market Now Makes Up 20% of Its Total Smartphone Industry as Organized, Unorganized Sectors Grow

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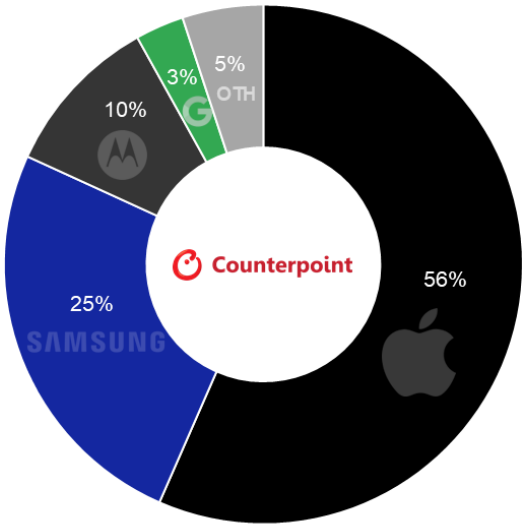
Smartphone OEMs Can Tackle Trump Tariffs with Base Change

- *The US last week announced reciprocal tariffs ranging from 10% to 104% on 57 countries.*
- *China, which accounts for about 80% of iPhone production for the US, now faces a steep 104% tariff following the April 2 announcement, impacting key brands like Apple, Motorola and Google. India accounts for the remaining 20% of supply.*
- *Vietnam with a 46% US tariff and India with 26% are the most impacted among the countries exporting to the US, affecting key brands like Samsung and Google.*
- *However, some of the above are better placed to respond to the tariffs. For example, India with a US tariff lower than those for China and Vietnam can offer a good production alternative.*
- *Apple's higher margins provide some buffer, but US consumers may still face a significant price increase on new iPhones as tariffs rise.*
- *OEMs may have already stockpiled smartphone inventory in the US in preparation for the tariffs.*
- *In the short term, some may focus more on sales outside the US.*
- *The long-term outlook remains uncertain.*

Seoul, Beijing, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Taipei, Tokyo – April 9, 2025

US President Donald Trump announced reciprocal tariffs for a broad list of countries on April 2. As many as 57 countries will be affected by this announcement, including the key manufacturing hubs for smartphone brands dominating the US market, like Apple, Samsung, Motorola, Google and longtail China-based suppliers for low-end US prepaid markets.

US Smartphone Sales Share by Brand, 2024



Source: Counterpoint Research Smartphone 360 Service

Vietnam will face a 46% tariff on its exports to the US, which will hit Samsung since the brand produces more than 60% of its smartphones in the country. Other brands such as Apple, Moto, Google and longtail brands are highly dependent on production in China, which will now be subject to a total US tariff of 104%, a sharp escalation from previous levels and the highest among all affected countries under the new policy. Therefore,

all the major brands are at risk of being hit by this tariff increase and are starting to look for solutions to somehow minimize the negative impact.

These new tariffs will directly affect the cost structures of smartphones sold in the US, which could result in higher retail prices and reduced consumer demand. The impact will vary across brands, depending on how many units are produced and in which country. Our initial thoughts are as follows:

What can Apple do?

- Apple has maintained higher margins than other brands, creating flexibility to absorb some of the tariff costs. The company is likely to be the least affected in the short term as it can avoid passing on tariffs to end users if it decides to do so. However, increased inflation and souring consumer sentiment can still lead to weakening demand.
- India faces a tariff of 26%, which is lower than for China and Vietnam. Since India accounted for 20% of the iPhone supply meant for the US in 2024, it could be a big beneficiary of any move to shift iPhone production meant for the US to a relatively cheaper destination.
- However, increasing capacity in India depends on the following factors:
  - Apple's intent and appetite to diversify swiftly
  - Technological readiness of Indian EMS partners
  - Capex investments and appetite
  - Support from ongoing government schemes
  - India's prowess at the US' negotiating table to become a 'favorable' production destination

Commenting on this potential scenario, **Counterpoint's** Research Vice President Neil Shah said, "India makes the most sense for now, followed by Brazil, though increasing capacity in both will take time. But Apple and everyone else have entered a twilight zone where it is impossible to anticipate tariffs one month or one year down the road, especially now with the China tariff jumping to 104%."

Shah added, "For Apple and others, there is a list of things that need to fall into place for India to be a better alternative than before – technological readiness of domestic EMS partners, capex appetite, government support and India's ability to deal with the US at the negotiating table on tariffs. If the country can do these things, it can cement itself as a more favorable production destination."

How are Samsung and others positioned?

- Even as **Samsung** is less dependent on China in terms of production, which is mostly for its mid-tier phones with Chinese ODM partners, it is in a strong position to address the concerns related to the new tariffs fairly quickly than others.

Commenting on this potential scenario, **Counterpoint's** Research Director Tarun Pathak said**, "**With significant capacity in India, Samsung can shift production away from Vietnam more quickly than others, helping it offset the impact of the new 46% tariff on Vietnam-made phones. Samsung has two factories in India and one of them has excess capacity which can be scaled up. Further, if the South Korean government successfully negotiates with the US, some exports of premium models from Samsung's South Korean factories will also see an uplift."

Motorola, which too relies heavily on Chinese ODMs and international EMS partners, is also in a relatively better position as it could benefit from shifting more production to Brazil (which has attracted the lowest tariff at 10% and is also one of its biggest markets), and India as well, leveraging Indian EMS partners which are likely to be the key beneficiaries.

Commenting on this potential scenario, **Counterpoint's** Research Director Jeff Fieldhack said, **"**While the imposition of these high tariffs is sudden, OEMs have likely been anticipating it. However, fundamental solutions such as relocating production bases require significant investment and time, and are unlikely to provide relief in the short term, while possible long-term solutions could also face tariffs."

Fieldhack added, “OEMs which are seeing healthy growth, like Google with its Pixel phones, will likely plan to shift manufacturing to alternative destinations such as India depending on their ODM/EMS partners’ capabilities and capacities. Brands that have been manufacturing for US carriers and prepaid markets will be affected the most due to their strong dependence on the Chinese ecosystem, which opens up new opportunities for existing brands to expand and newer brands to enter.”

Read more:

- Shipments of ‘Made in India’ Smartphones Grew 6% YoY in 2024 Amid Record Exports
- India Handset Shipments by Manufacturer, Q4 2024

Related Notes:

- Automakers Swerve To Minimize Impact Of US Tariffs
- Counterpoint First Take: Impact of Trump Tariffs on Global Trade, Tech Industry

Global Smartphone Market Grows 3% in Q1 2025 But Future Uncertain; Apple Takes #1 Spot in Q1 For First Time

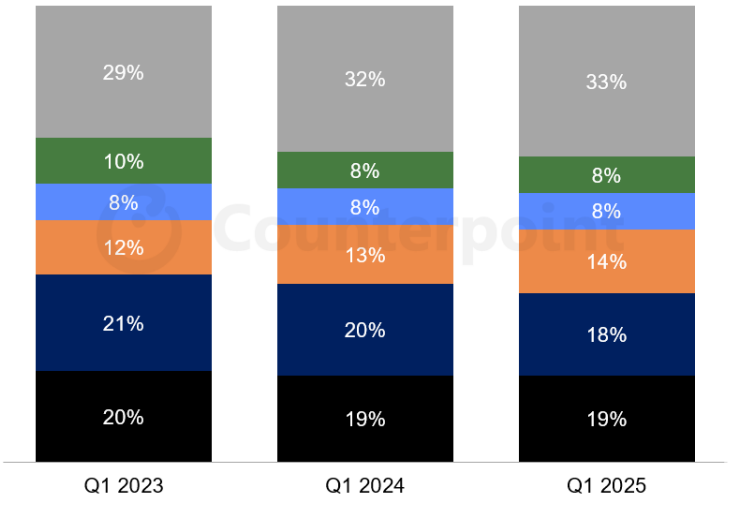
- *The global smartphone market continued its growth trajectory in Q1 2025. Smartphone sell-through grew 3% YoY during the quarter, driven by growth in emerging markets and a subsidy-led demand boost in China.*
- *Helped by the iPhone 16e launch and continued expansion in emerging markets, Apple took the #1 spot in Q1 2025, its first ever for the first quarter, with a 19% share. Strong sales growth in markets like Japan and India helped.*
- *The global smartphone market is likely to show a decline in 2025, as rising economic uncertainties caused by tariffs are likely to hurt consumer demand across markets, especially in the US. Consequently, we have revised our full-year forecast and now expect volumes to decline slightly YoY in 2025.*

Seoul, Beijing, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Taipei, Tokyo – April 14, 2025

The global smartphone market grew 3% YoY in Q1 2025, according to preliminary results from Counterpoint Research's **Market Pulse Early Look**. Declines in developed markets were offset by growth in China owing to government subsidies, and continuing recovery in key emerging markets across Latin America, Asia-Pacific and Middle East & Africa.

Commenting on market dynamics, **Senior Research Analyst Ankit Malhotra** said, "The market got off to a mixed start in 2025, where Q1 saw continued improvement in economic conditions, particularly in emerging markets. But mature markets like North America, Europe and China showed signs of fatigue after a recovery in 2024. Sales in January were particularly strong, with a subsidy-led demand boost in China. The momentum continued with major launches like Samsung's S25 and iPhone 16e, but it turned quickly as economic uncertainties and trade war risks started mounting, especially towards the end of the quarter. We continue to analyze changes in policies and are currently projecting the market to decline YoY in 2025, despite growth in Q1."

Global Smartphone Sell-through Share of Top 5 OEMs
Q1 2023 vs Q1 2024 vs Q1 2025



Source: Counterpoint Research Market Pulse Early Look, March 2025
Notes: OPPO includes OnePlus; Percentage totals may not add up to 100% due to rounding

OEM dynamics continue to remain interesting. Helped by the iPhone 16e launch in a non-traditional quarter and continued growth and expansion in its non-core markets, Apple took the #1 spot in Q1 2025, despite the challenges faced in its biggest markets. While sales in the US, Europe and China were either flat or declining, Apple recorded double-digit growth in Japan, India, Middle East and Africa, and Southeast Asia. Samsung followed Apple with 18% market share. While it had a slow start due to the late launch of the S25 series, its sales showed a resurgence after the launch of the flagship S25 and new A-series devices. Samsung's sales grew by double-digits in March. The share of "Ultra" in the S25 series sales showed an increase.

Xiaomi, continuing its strong sales momentum, gained market share, helped not only by expansion into new markets but also by significant growth in the domestic market, where the brand is enjoying a bigger and more 'premium' brand presence thanks to its successful foray into electric vehicles. The fastest-growing top-five brand, vivo, gained a rank to take the fourth spot, thanks to its high exposure to the buoyant China market and expansion into emerging markets. OPPO came in at #5, and saw sales growth in India, Latin America and Europe. Outside of the top five, HONOR, Huawei and Motorola are growing quickly and providing tough competition globally. Huawei was the biggest OEM in China in Q1, while HONOR and Motorola showed high growth in multiple markets.

After a decline in the market in 2023, it has shown steady growth led by improvement in macroeconomic conditions. Smartphones being an essential product will always have a steady sales graph, but economic uncertainties can make consumers postpone their purchases and thus, the rise in trade risks and unsettling of the supply chain can negatively impact on the market going forward. The proliferation of new technologies like GenAI and foldables will continue, but OEMs need to carefully monitor demand going forward. While our long-term outlook remains steady, we believe the market will show a decline in 2025.

Smartphone Shipments Up 3% YoY in Q1 2025; Samsung Takes Top Spot With Narrow Lead Over Apple: Prelim Data

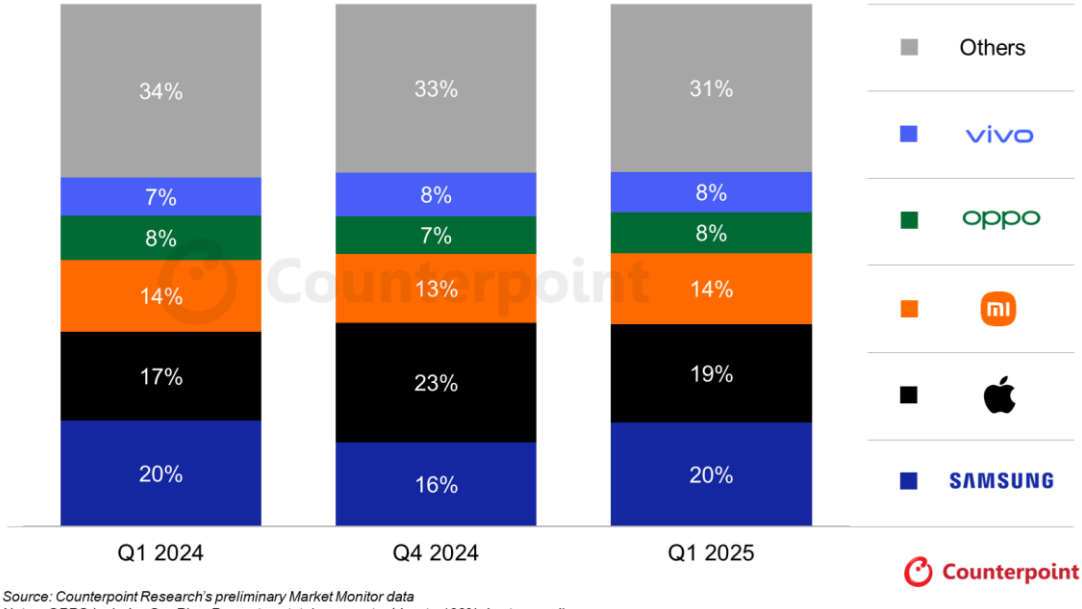
- The global smartphone market's shipments grew 3% YoY during Q1 2025, driven by growth in markets like China, Latin America and Southeast Asia.
- Samsung secured first place, beating Apple by a narrow margin.
- Huawei was the fastest-growing brand due to its strong growth in the Chinese market.

Seoul, Beijing, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Taipei, Tokyo – April 16, 2025

Global smartphone shipments in the first quarter of 2025 grew 3% YoY, according to preliminary data from Counterpoint Research's ***Market Monitor*** service. The global smartphone market, which grew in 2024 after a dip in 2023, started off on a positive note in 2025 as well, driven by growth in markets like China, Latin America and Southeast Asia.

Commenting on the market**,** ***Senior Analyst Yang Wang*** said, "The Q1 growth fell short of our earlier projection of 6% as uncertainty started building up around tariffs towards the end of the quarter and as a cautious inventory buildup was seen at OEMs. Uncertainty still looms in the market, which will affect the situation going forward. As a result, our previous forecast of 4% growth in 2025 seems hard to achieve. We may even see zero to negative growth this year."

Global Smartphone Sell-in Shipment Share for Top 5 Brands (preliminary)



Source: Counterpoint Research's preliminary Market Monitor data
Notes: OPPO includes OnePlus; Percentage totals may not add up to 100% due to rounding

Global Smartphone Sell-in Shipments for Top 5 Brands in Million Units (preliminary)

Company	Q1 2024	Q4 2024	Q1 2025	YoY Growth
SAMSUNG	60	52	61	1%
	51	74	58	14%
	41	43	42	2%
oppo*	25	23	24	-5%
vivo	22	27	23	8%
Global	297	323	305	3%

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Source: Counterpoint Research's preliminary Market Monitor report (based on sell-in)

Notes: OPPO includes OnePlus; Percentage totals may not add up to 100% due to rounding; Unit figures have been rounded to the nearest million. Growth percentages are based on actual shipment data before rounding.

Commenting on OEM performance, ***Senior Analyst Jene Park*** said, "Samsung became the top vendor again in Q1 2025, helped by increased shipments following the launch of its Galaxy S25 series and a refresh of the A series in the entry-to-mid-tier price bands. It was rare for Apple to have a new product launch in Q1, but the new iPhone 16e helped the brand gain share in certain markets like Japan."

Apple was the top brand during Q1 in terms of unit sales, according to our *sell-through report,* but it fell to second place in terms of unit shipments, which is what the brand sold into the channel. However, Apple's performance was stronger than any other first quarter before and it almost tied with Samsung this time. The iPhone 16 series is showing strong demand in emerging markets within APAC, LATAM and MEA, where Apple grew in double digits.

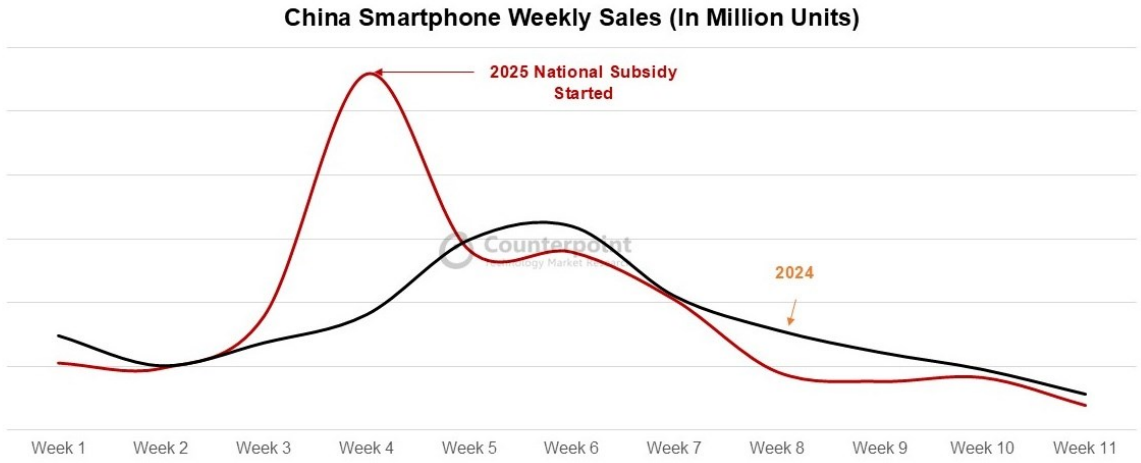
Based on preliminary data, Xiaomi continued its momentum and held on to its third place with 2% YoY growth. This performance largely came from a strong comeback in its home market China, supported by the brand's retail and portfolio expansion. OPPO and vivo captured fourth and fifth positions respectively, separated by a narrow margin. Both brands gained from their strong performance in the mid-tier price band and from government subsidies in China. However, the real beneficiary of China's subsidies appears to be Huawei, which was the fastest-growing brand during the quarter and has now captured the pole position in China's market.

The final first quarter numbers will be reported at the end of this month.

China’s Subsidy Scheme Fails to Generate Sustained Smartphone Demand

- *China's weekly smartphone sales posted consecutive YoY declines from Week 5 to Week 11, after a temporary spike before the Spring Festival.*
- *The national subsidy program seems inadequate to generate sustained follow-up demand.*
- *Lingering economic concerns continue to curb Chinese consumers’ enthusiasm for smartphone purchases.*
- *Market revival will require product innovations rather than just financial incentives.*
- *The market is likely to see a demand rebound with new product releases by major OEMs.*

After a temporary spike before the Spring Festival, China’s weekly smartphone sales posted consecutive YoY declines from Week 5 to Week 11, with cumulative sales dropping 5% YoY, according to Counterpoint’s **China Weekly Sell-through Tracker**. Though the national subsidy program helped mitigate the market’s downward trend during its inaugural week, it failed to generate sustained follow-up demand.



Source: China Weekly Smartphone Sell-Through
2025 Spring Festival spans from Jan 28 to Feb 4 (Week 5-6). 2024 Spring Festival runs from Feb 10 to Feb 17 (Week 6-7).

Also, the escalation of US tariff policies had a negative impact on China, whose economy relies heavily on manufacturing and exports. These concerns about the economic future have suppressed Chinese consumers’ demand and appetite for purchasing consumer electronic products. Without the boost driven by subsidies, the decline could have been even more severe.

To further stimulate domestic consumption, China’s government expanded the subsidy program in March to include smartphones priced above CNY 6,000. Under this program, select channels provide a 10% discount (capped at CNY 1,000 per device).

However, we believe market revival will require product innovations rather than just financial incentives. AI-powered smartphones hold significant potential to reignite market excitement, but as of now, consumers only perceive marginal enhancements in their daily experiences. This situation is likely to improve over the coming year.

The smartphone market is now in its slow season, especially from late February to April, when most newly released products have already been in the market for nearly six months or longer, and their initial appeal has faded. On the other hand, new model launches see subdued activity during the period. Even with the national

subsidy, which can be utilized only once, consumers still prefer to wait and assess upcoming new product releases before deciding whether to upgrade their phones. With major OEMs launching new models in April, we expect the market to see a demand rebound.

Nevertheless, the recent escalation of US tariffs has intensified bilateral tensions, prompting a reassessment of supply-demand dynamics and rising manufacturing costs. This may trigger macroeconomic volatility, potentially reshaping global and Chinese domestic consumption patterns. Meanwhile, China's accelerated "internal circulation" strategy to boost domestic demand aims to counterbalance production pressures, though cautious monitoring remains crucial given its indirect impact on demand-side adjustments.

Outsourcing to ODM Partners Contributed Record 44% to Global Smartphone Shipments in 2024

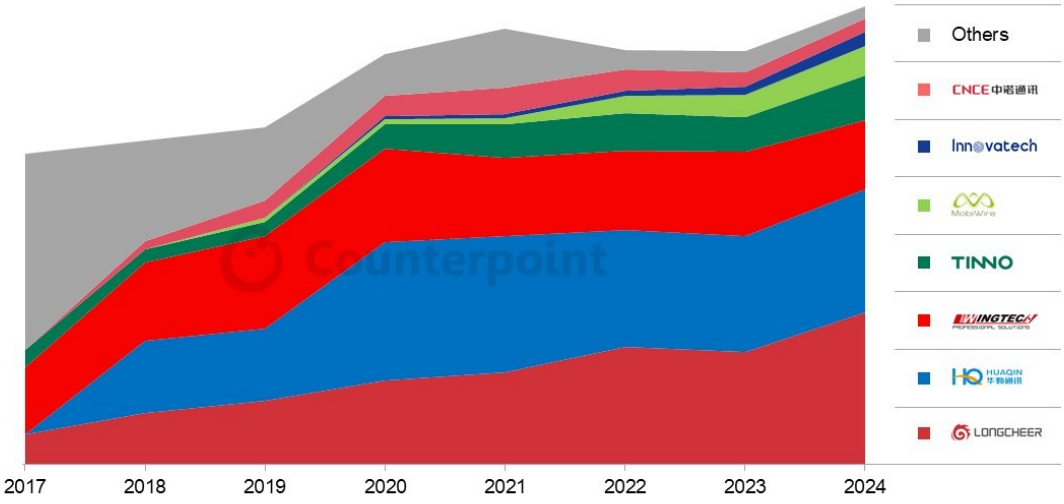
- *Outsourced design and manufacturing by ODMs has surged globally since the smartphone shipment peak in 2017.*
- *The market has expanded and consolidated significantly since 2017, with competitive dynamics shifting markedly. There is a clear dominance of China-based companies among the top ODMs now.*
- *Industry leaders like Longcheer, Huaqin and Wingtech have scaled rapidly driven by prudent designs, improving quality, efficient sourcing strategies and strong global supplier partnerships that support the ongoing smartphone premiumization trend.*
- *In response to geopolitical tensions and recent US tariffs, several ODMs are expanding production outside of China and may transition towards a more integrated IDH + EMS model with localized EMS operations in regions such as India or Brazil.*

Seoul, Beijing, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Taipei, Tokyo – April 17, 2025

Outsourced design and production by original design manufacturers (ODMs) has surged globally since the smartphone shipment peak in 2017, leading to its growing share in the overall market. According to the latest **Smartphone ODM Report** from Counterpoint Research, the outsourced portion reached a record 44% of total smartphone shipments in 2024.

With the mobile phone market undergoing swift technological changes, including changes in the form factor – from the candy-bar type and qwerty-type feature phones to touchscreen smartphones, OEMs have increasingly relied on ODMs to achieve economies. This has not only driven growth for ODMs but also consolidation, with a significant change in competitive dynamics between different ODMs since 2017.

Smartphone Market ODM Shipments Growth, 2017-2024



Source: Counterpoint's Smartphone Manufacturing 360 Service
*Note: *Starting from 2025, Wingtech's ODM business becomes part of Luxshare.*

Commenting on this trend, **Vice President of Research Neil Shah** said, "ODMs play an essential role in the smartphone industry because they are key to democratizing sub-frontier technologies for massive consumer

bases. With in-house design, brands bring in cutting-edge technologies for the higher price bands. However, the law of survival of the fittest also applies to ODMs."

All of the top 10 ODMs, and those beyond, are dominated by companies based out of China. Today's ODM leaders are completely different than those 10 years ago, thanks to the growing consolidation and concentration of smartphone brands.

These leaders, such as Longcheer, Huaqin and Wingtech, have seen their scale grow handsomely driven by prudent designs, improving quality, efficient sourcing strategies and strong global supplier partnerships supporting the ongoing smartphone premiumization trend. However, with growing geopolitical turbulence, some of these ODMs have been expanding outside of China as well to support their key customers' expansion and growth outside China.

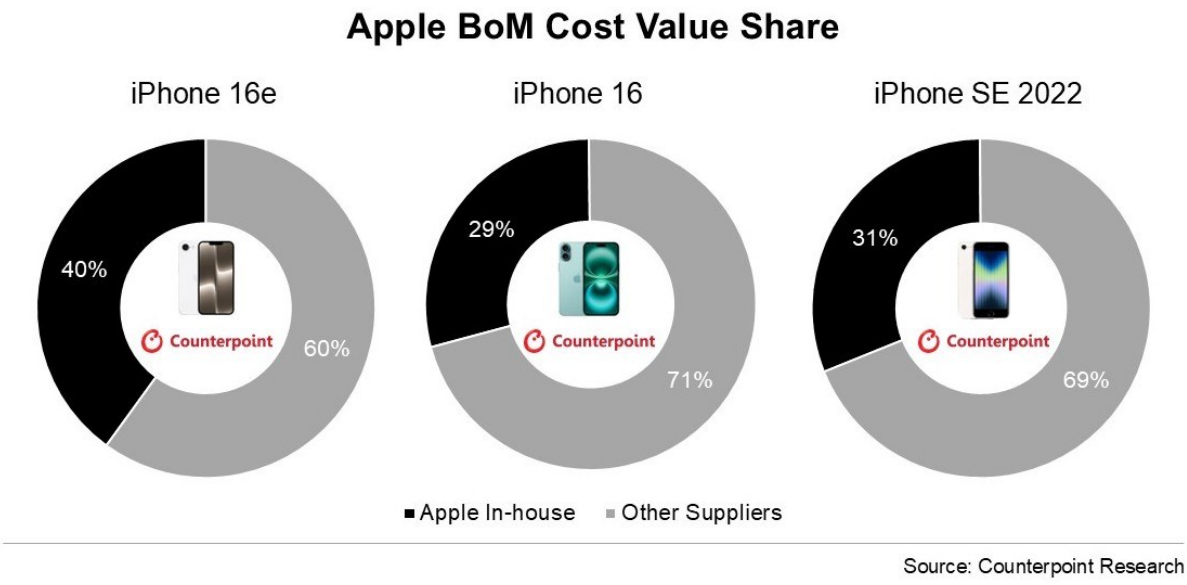
Senior Analyst Ivan Lam said, "Maintaining a leading position in this industry is no easy task. For a company to stay ahead for over a decade, it must have developed unique survival strategies and risk-resilient capabilities. Of course, certain external factors can also trigger seismic shifts in the landscape. A recent example is Wingtech, which had to divest its product integration business to Luxshare after being sanctioned by the US. The year 2025 itself is already fraught with significant uncertainties, not to mention the recent sudden disruptions caused by US tariff measures."

Within the runner-up group, TINNO has demonstrated remarkable resilience as a perpetually competitive force in the market, achieving 31% growth last year. This momentum positions it as a potential contender for the top three rankings by H1 2025. Our observations also highlight accelerated growth trajectories for MobiWire and Innovatech this year, driven by strategic partnerships with emerging brands.

Senior Analyst Prachir Singh said, "Collaborative synergy with brands remains the definitive catalyst for growth. However, the industry now demands enhanced capabilities to keep pace with the global trend of diversification of manufacturing and supply chains."

The recent US tariffs will exacerbate this trend, and it remains to be seen how this will shape the competitive landscape among ODMs. They may be forced to move to a more integrated IDH+EMS model, with EMS being locally distributed in "favorable production" geographies such as India and Brazil.

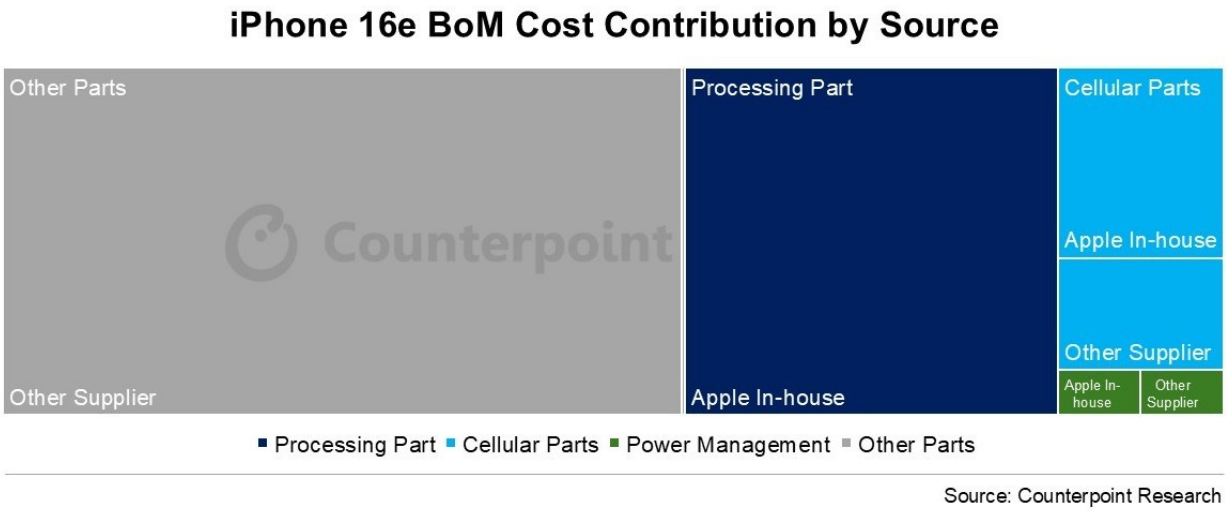
Infographic: Smartphones | Apple iPhone 16e | BoM Cost



iPhone In-House % Total Component Cost: iPhone 16e highest at 40%

Key Drivers: Baseband, transceiver and related PMICs

Cost Savings: $10/device driven by Apple's 5G solution



iPhone 16e In-House Chips: Processing, cellular connectivity, power mgmt

Cellular, Power Mgmt "In-house Value Share": Rise to 63% & 50%, respectively

Key Drivers: C1 baseband IC, related transceiver, PMIC

iPhone 17: Likely to adopt same cellular solution

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Survey: High Demand for Compact Smartphones in India, But Market Has Limited Options

- *Around 68% of the survey respondents feel that the current Indian smartphone market lacks sufficient options for compact smartphones.*
- *More than half of the respondents are not willing to compromise on processor performance and battery life when choosing a compact smartphone.*
- *88% of the respondents are likely to purchase a compact smartphone in the near future if it offers similar performance as a larger flagship phone.*

New Delhi, Beijing, Boston, Buenos Aires, Hong Kong, London, San Diego, Seoul – April 22, 2025

Counterpoint Research's latest consumer survey in India highlights a strong preference for compact smartphones (74%), yet 68% of the respondents believe the market currently offers limited choices in this form factor.

To understand the evolving consumer preferences, especially the growing demand for compact smartphones, which offer both comfort and performance, a survey was conducted among over 2,000 young emerging professionals and early jobbers in India.

Consumers expect feature parity in compact devices — 88% are likely to purchase a compact smartphone if it delivers flagship-level performance, with more than half of the respondents not willing to compromise on processor performance and battery life when purchasing a compact smartphone.

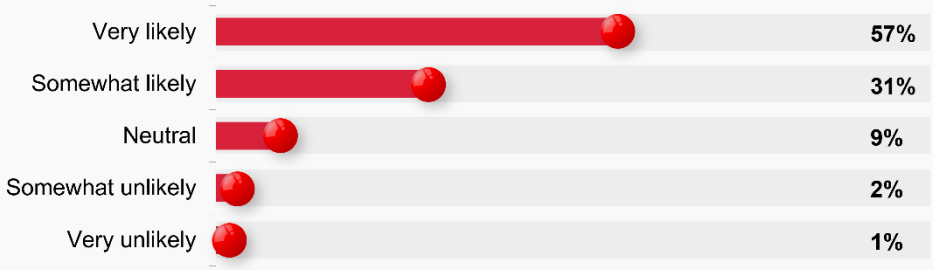
The primary challenges users encounter with large-screen smartphones include difficulty in operating the device with one hand and maintaining a secure grip, and an increased risk of accidental drops. As a result, one-handed usability is considered a very important factor by respondents, with ease of holding and one-handed use (55%) being the main reasons for their preference for compact smartphones over larger ones. This is followed by greater comfort during extended use (49%). A whopping 71% of the respondents also want a good in-hand feel, while 69% pay attention to the look and feel of the smartphone when making the purchase decision.

Commenting on consumer preference for compact smartphones, Counterpoint Research Director Tarun Pathak said, "Consumers want compact devices without compromising on core features like processor performance and battery life. Many of the consumers who are approaching their upgrade cycles are now leaning towards compact smartphones. This shift is driven by the desire for more comfortable, long-term use. However, the availability of compact yet powerful options in the market still remains limited. About 90% of smartphones launched in 2024 featured screens larger than 6.5 inches. Hence, this highlights a clear opportunity for smartphone brands to introduce powerful compact smartphones to meet consumer demand."

Counterpoint

India Compact Smartphone Consumer Study

88% Would buy a compact smartphone if it performs as well as a bigger flagship phone.

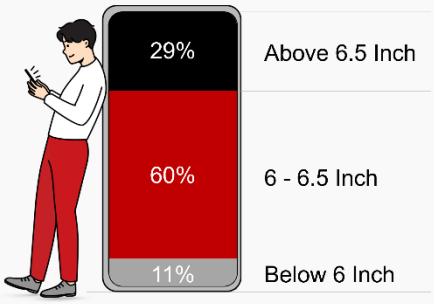


68% Agree with the statement that there are limited compact smartphone options available in the market.

Over half prioritize performance and battery life while choosing compact phones.

73% Consider it very important to have the ease of using phone comfortably with one hand.

6 to 6.5-inch display is favoured by 60%



Apple, Samsung *and* ***OnePlus*** *top preferences for the survey participants' next compact smartphone purchase, without compromising on features.*

Source: Counterpoint Research consumer survey commissioned by OnePlus

Consumers prefer Apple, Samsung and OnePlus for their next compact smartphone purchase, without compromising on features. Given that 73% of the respondents emphasize the importance of comfortable one-handed use, a 6-to-6.5-inch display is seen as the ideal size for a compact smartphone by 60% of them. Only 29% prefer screens larger than 6.5 inches, and just 11% opt for displays smaller than 6 inches. The survey also reveals that processor performance and battery life are the deciding factors for over half of the respondents.

With the rise of casual mobile gaming, 86% of the respondents show a preference for compact smartphones to enhance their gaming experience. This preference is driven by the ease of holding such devices during extended sessions (69%) and the overall comfort they offer for long-term use, helping reduce hand strain (69%). Additionally, 84% of users would prefer having a customizable button for greater functionality with quick access to key features like the camera, volume and apps. Looking ahead, 89% also consider AI-powered features, such as voice assistants, camera enhancements and battery optimization, as important when planning their next smartphone purchase.

Senior Research Analyst Arushi Chawla said, “Consumers are increasingly seeking compact smartphones that provide a seamless and comfortable one-handed experience for use cases like taking selfies, typing messages and gaming. However, while prioritizing ease of use, a key concern remains the potential trade-off on battery life and processor performance when buying a compact device. This highlights the need for compact smartphones that balance portability with high-performance capabilities.”

Disclaimer

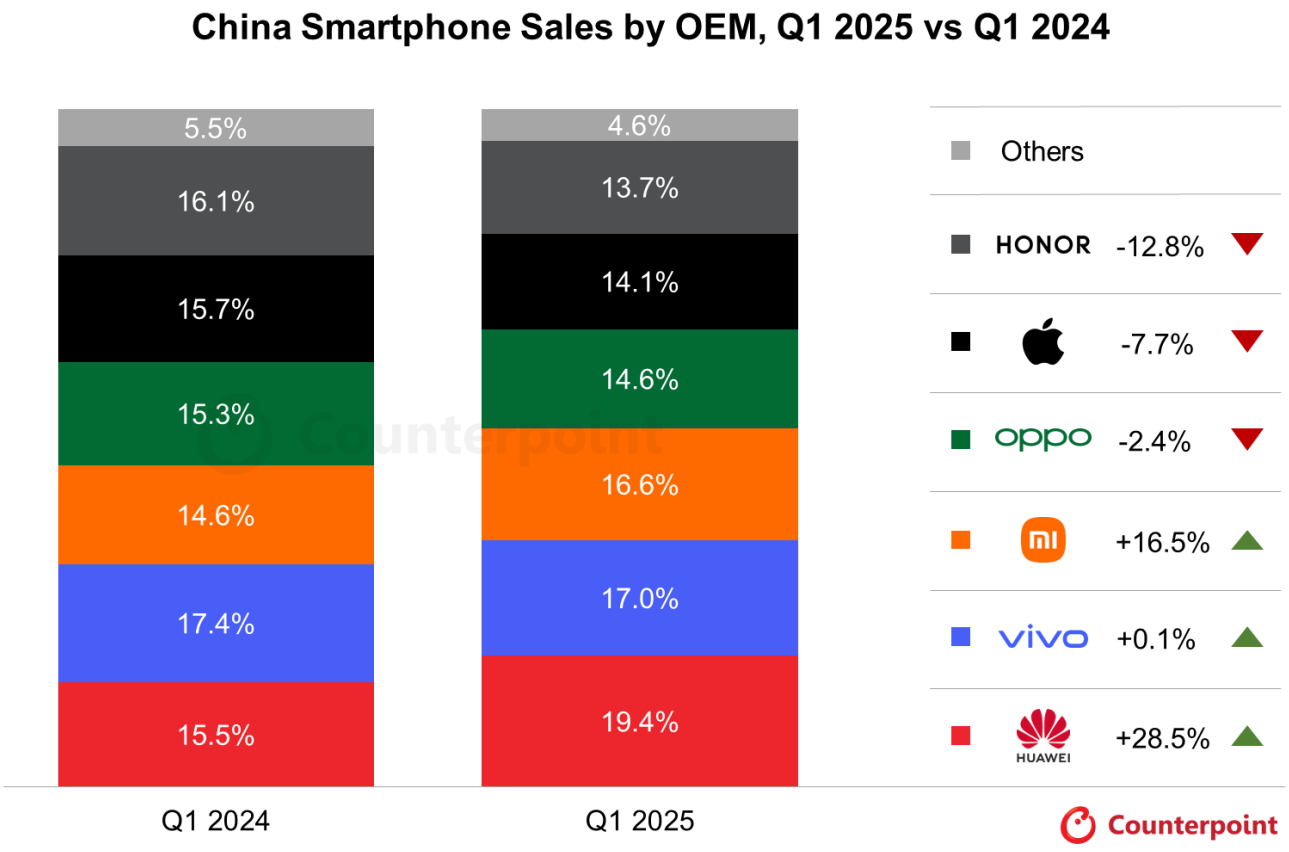
This survey was commissioned by OnePlus to understand the Indian smartphone consumer’s evolving preferences and the required value proposition. In particular, the survey aimed to understand the demand for compact smartphones among 2,019 young Indians aged 18 to 35 across Tier 1 and Tier 2 cities covering all zones. We expect the results to be accurate within the +/- 4% range.

China Smartphone Sales Rise 2.5% YoY in Q1 2025, Driven by Government Subsidies

- *Huawei maintained its top position in Q1 2025 with a 28.5% YoY sales increase to reach its highest-ever market share since 2021.*
- *Xiaomi also recorded double-digit YoY growth, a result of its broader portfolio benefiting from government subsidies.*
- *The second spot was taken by vivo with a 17% market share, supported by a strong product portfolio across multiple price segments.*
- *However, the Q1 growth fell short of expectations with demand falling during the second half of the quarter, with the US-China trade tensions adding a layer of uncertainty.*

Beijing, Boston, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Seoul, Taipei, Tokyo – April 24, 2025

China's smartphone sales increased 2.5% YoY in Q1 2025, according to Counterpoint's ***Market Pulse Service***. The growth was driven by the government's national smartphone subsidy program, which helped lift sales around the holiday season. Launched in January this year, the program covers smartphone models priced below CNY 6,000 (about $820). OEMs launched promotions to take full advantage of the *subsidy*, including cutting the prices of premium models to make them eligible. However, the market turned south in the post-festival period, which led to the overall quarter falling short of expectations.



Notes: OPPO includes OnePlus; Xiaomi includes Redmi; vivo includes iQOO; Figures may not add up to 100% due to rounding; Numbers are preliminary and may change during finalization.

Huawei led for the second consecutive quarter with a share of 19.4%, its highest ever since 2021. Huawei has consolidated its dominance in the market due to strong demand for the Nova 13 and flagship Pura 70 series.

The national subsidy coupled with price cuts for hot-selling models and strong performance in the premium price band of $600-$799, where Huawei currently leads, contributed to the growth.

The second spot was taken by vivo, with its market share rising to 17% from 16.3% in Q4 2024. vivo's budget-friendly Y series contributed most of its sales. Meanwhile, it also made progress in the high-end segments. Its premium X200 series inherited the brand's *strong photography reputation*, with consumers recognizing its photo quality and its collaboration with Zeiss.

Xiaomi was the second-fastest-growing brand during the quarter with a market share of 16.6%. The brand is benefiting from the government subsidies that apply to the majority of its portfolio. However, it is also gaining share in the premium segment, thanks to the halo effect of its entry into the EV segment and expansion of offline retail. In Q1, the brand introduced the Xiaomi 15 Ultra and unveiled a photography kit for the Mi 15 Ultra to offer an experience similar to that of a traditional camera.

OPPO and Apple captured the fourth and fifth spots, respectively. While OPPO's A series performed well during the quarter, its Reno 13 series helped the brand gain share in the mid-tier segment. OPPO has also been doubling down on its AI strategy, bringing AI features to its broader portfolio. Apple's sales declined as most of its portfolio is priced above the subsidy threshold, including its best-performing Pro models**.**

Chinese smartphone OEMs are aggressive in adopting the strategy of "high specs with a competitive price". As a result, their market shares have grown significantly in the mid-to-high-end price segments.

Other key insights

DeepSeek drives on-device AI race: Close to 40% of the smartphones sold in China during the quarter were GenAI-enabled, according to Counterpoint's *Global GenAI Smartphone Tracker*. Capitalizing on DeepSeek's emergence and its global impact during the quarter, leading Chinese smartphone OEMs quickly integrated or have plans to integrate its advanced models to enhance on-device AI and end-user experience.

Foldables **become next big frontier:** In the foldable segment, OPPO launched the *Find N5*, claiming it to be the thinnest foldable phone. Huawei released a clamshell model, the Pura X, with a starting price of CNY 7,499 (about $1,028). The model, which stands out with its unconventional 6.3-inch display in the 16:10 ratio, continues to lead the segment.

Bigger batteries and durability are differentiators: OEMs are expected to launch more models in Q2 with innovative technologies to boost sales. *HONOR* has unveiled HONOR Power, a new product line featuring an 8000 mAh battery to address customers' demand for long battery life.

Looking ahead

The Q1 growth fell short of expectations with demand falling during the second half of the quarter. Promotions and subsidies only frontload demand rather than creating a new one. Looking ahead, we still believe the market will post YoY growth for 2025 but at a smaller rate. OEMs will launch new models in Q2, and the mid-year sales festival will still have the potential to lift sales. However, the US-China trade tensions have added a layer of uncertainty. *We are tracking the space closely, especially on the sectoral tariffs that can have an overall impact on the global economy and subsequent consumer demand.*

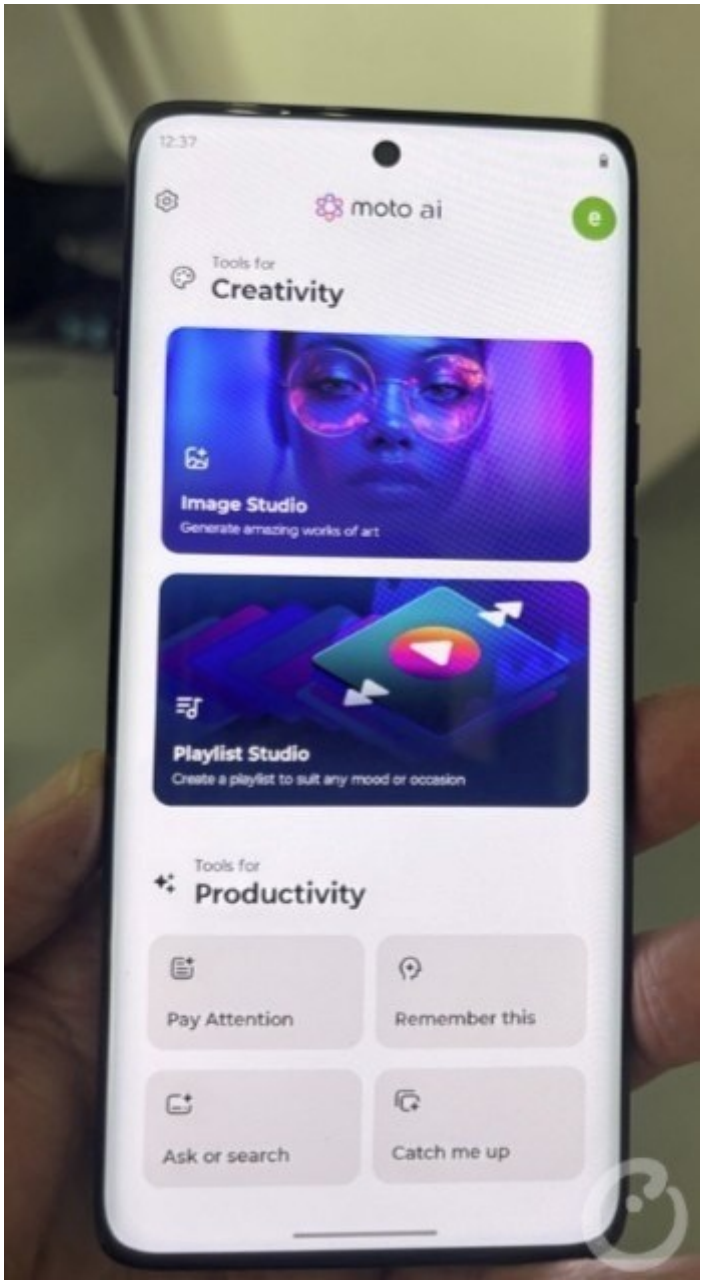
Moto Launches Three RAZR Flips at NYC Event

Allison Yi, the lead for Motorola's North American Product Portfolio, presenting RAZR products.

Motorola held a RAZR launch event in New York City today. The key headline is that there will be three new RAZR flip smartphones hitting the market soon, priced at about $599, $999, and $1299. Motorola President, Sergio Buniac, introduced the line-up of smartphones, tablets, PCs, ear buds, and watches, which will all be increasingly connected with new AI features. Per Counterpoint Research data, Moto has grown its smartphone shipments by 23% in 2024 and has sold about three million flip smartphones since 2022. Motorola’s goal is to further gain share within premium price tiers via this line-up of flip smartphones and the value of ‘Moto AI’. Key takeaways from the event:

3 RAZRs were introduced:

- RAZR Ultra $1299, QCOM Snapdragon 8 Elite, 7” internal pOLED display 4500 nits and 4” external display, 3 50MP cameras (main, ultrawide, selfie)
- RAZR + $999, QCOM Snapdragon 8S Gen 3, 6.9” internal pOLED display and 4” external display, 2 50MP back cameras and 32MP selfie
- RAZR $599, MTK 7400x, 6.9” FHD internal display and 3.6” external display, 50MP main camera, 13MP ultra-wide, and a 32MP selfie
- About 1/3 of the event was dedicated to AI. Motos Nicole Hagen and Angelina Gomez described the improvements of ‘Moto AI’, which has shortcuts for ‘ask or search’, ‘pay attention’, ‘remember this’, ‘catch me up’, image studio and playlist studio (complete details in our videos and more detailed write-ups on the Counterpoint website).
- Moto is working closely with AI partners. On stage, describing new AI applications were Aravin Srinivas of Perplexity, Zaheed Sabur of Google, and Ash Jhaveri of Meta. Microsoft is another key AI partner for Moto. ‘Moto AI’ will focus on personalization and prediction-learning, and with the ability to suggest the most appropriate AI search engine. There will be 3-month free trials for Perplexity and Gemini. Moto will spend marketing dollars on key features and will have some exclusives under ‘Moto AI’. It’s early, but there are some interesting developments that will help consumers take advantage of AI on Moto hardware.



- Partnerships with Pantone and Alcantara are producing vibrant colors and interesting back cover materials (think wood, other matte finishes). Over 65% of flip sales are ‘stretch’ colors. Look for more vibrant colors such as Viva Magenta and Coffee Mouse to continue!

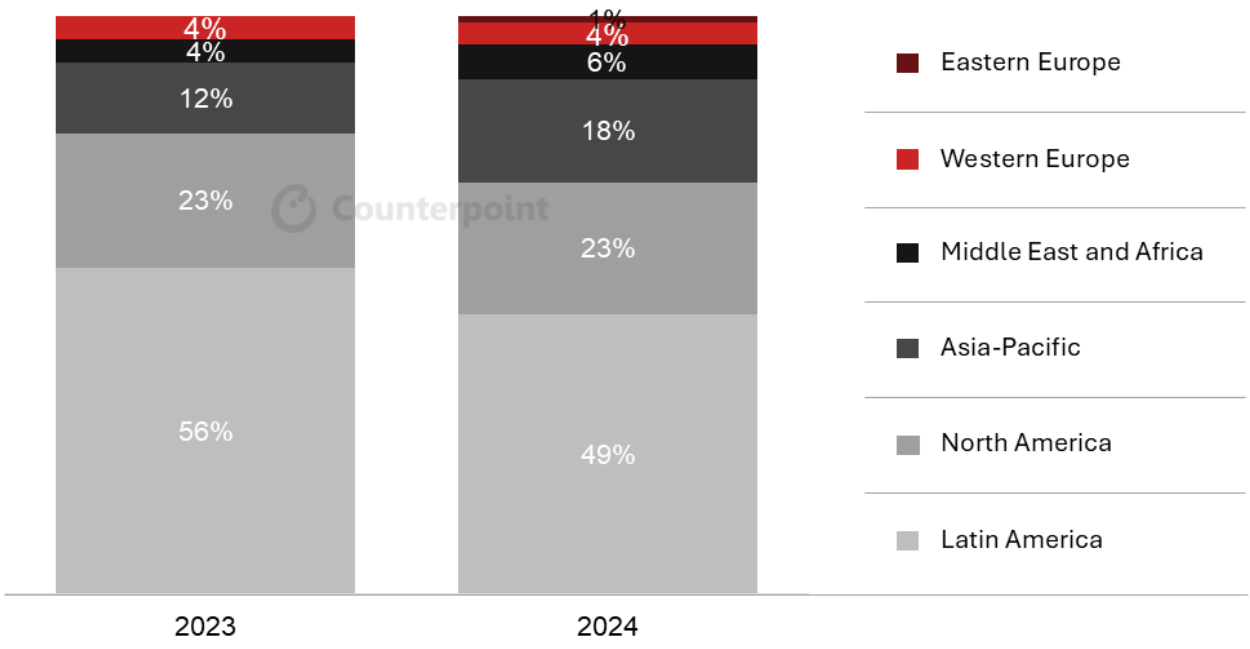
The launch of three flip smartphones in different price tiers is a positive for Moto. The work on the AI story continues, but there is positive momentum from the ‘Moto AI’ offering. 2025 will be a volatile year for the smartphone ecosystem. We expect to see Moto continue to grow its shipments and global market share. @counterpointresearch *Motorola Mobility (a Lenovo Company)*

Strategic Edge Drives Motorola's Highest Smartphone Sales in a Decade

- Motorola's smartphone sales in 2024 grew 21% YoY, outpacing the market average of 3%.
- This also translated to Motorola recording its highest annual sales smartphone sales in a decade.
- The growth was driven by Motorola's strategic emphasis on design, user experience and ecosystem development along with channel expansion.

Motorola's smartphones registered 21% YoY unit sales growth in 2024, outpacing the market *average of 3%*, according to Counterpoint's ***Global Handset Model Sales Tracker***. This also translated to Motorola recording its highest annual smartphone sales in a decade while also clocking 17% YoY jump in the average selling price (ASP). The brand experienced high-double-digit growth across all regions except Latin America where its performance was impacted by a large base effect. This global growth increased regional diversification of Motorola's sales, with Latin America's share falling under 50% for the first time since 2018.

Motorola Smartphone Sales Share by Region, 2024 vs 2023



Source: Counterpoint Research Global Handset Model Sales Tracker
Note: Totals may not add up to 100% due to rounding

The growth was driven by Motorola's strategic emphasis on design, user experience and ecosystem development along with channel expansion:

Design: Through its ongoing collaboration with *Pantone*, Motorola consistently delivers smartphones with striking and desirable colors, guided by global trends. This focus on aesthetics highlights Motorola's ambition to become a lifestyle brand, offering consumers an experience beyond just hardware and specifications. The *Edge 50* series smartphones ship with scented packaging for an elevated unboxing. Motorola continues to bring first-in-segment features as well. The Edge 60 Stylus is the only smartphone offering a stylus in its price band, while the Edge 60 Fusion brings a quad-curved display.

With more smartphone innovation taking place on the software side, the design, touch and feel of devices now act as significant differentiators, playing a key role in driving sales, building brand loyalty and offering better value.

User experience: Motorola continues to stick to near-stock Android experience across its smartphones, further differentiating itself from peers by offering a simple and intuitive interface. Motorola has expanded its partnership with Pantone to enhance its cameras and displays to deliver true colors and address key factors that significantly influence consumer buying decisions, as regularly shown by Counterpoint's consumer surveys.

Keeping up with the latest innovations, Motorola has integrated *AI* capabilities through MotoAI in its flagship devices. The 'Catch Me Up' feature utilizes natural language processing to generate summaries of missed calls and messages, while the 'Remember This' feature employs AI to analyze and tag captured content for enhanced searchability and recall. As more AI use cases emerge, we will likely see further additions of features and changes in UI and consumer behavior.

Collaborations: *Motorola* is strategically leveraging sports sponsorships to enhance its identity and promote its smartphones and ecosystem products to a wider audience. *In the US*, it has partnered with prominent teams across baseball (e.g. Chicago Cubs) and basketball (e.g. Chicago Bulls), while on the international stage, Motorola's collaborations with FIFA and F1 provide significant visibility. These high-visibility engagements are pivotal in expanding Motorola's reach and reinforcing its brand perception.

Connected ecosystem: With its recent expansion into tablets, laptops and location tracker 'Moto Tag', alongside its existing range of wearables and hearables, the brand is steadily expanding its ecosystem, offering better integration and support while delivering a seamless user experience. Motorola's Smart Connect further strengthens the ecosystem by facilitating cross-device integration with Windows and Android devices. The ecosystem development aligns with Motorola's strategy to position itself as a lifestyle brand while keeping design and functionality at its core.

Ecosystem stickiness enhances consumer awareness by consistently exposing users to the brand's interconnected products and services, creating familiarity and recognition. Over time, this builds trust and credibility, making consumers more likely to choose the brand for future purchases or upgrades.

Channel expansion: Motorola is actively pursuing a strategy of extensive global channel expansion to strengthen its presence in the smartphone market. In India, Motorola is expanding its offline presence, transitioning from being primarily online-driven, to provide consumers with opportunities for hands-on experience. In the US, Motorola has intensified its focus on the prepaid channel, particularly with its Moto G series, resulting in significant overall growth in that market. Furthermore, the brand has established partnerships with network operators in Japan, leading to increased availability of Motorola devices for consumers in that region. The brand has expanded its presence in other key regions as well, including the Middle East and Africa (MEA) and Southeast Asia (SEA).

Outlook

In 2025, Motorola is likely to expand into the MEA and SEA regions while strengthening its position in existing territories with a continued emphasis on design and aesthetics. Motorola is likely to maintain a strong presence in the mid-tier segment while pushing into the premium segment with its upcoming foldable smartphone models. *AI* infusion will also see deeper integration across devices as more general and specific use cases emerge. We believe the brand is on its way to another successful year in terms of its smartphone growth, but it needs to tackle certain challenges in markets like North America and LATAM due to new trade tariffs and macroeconomic issues.

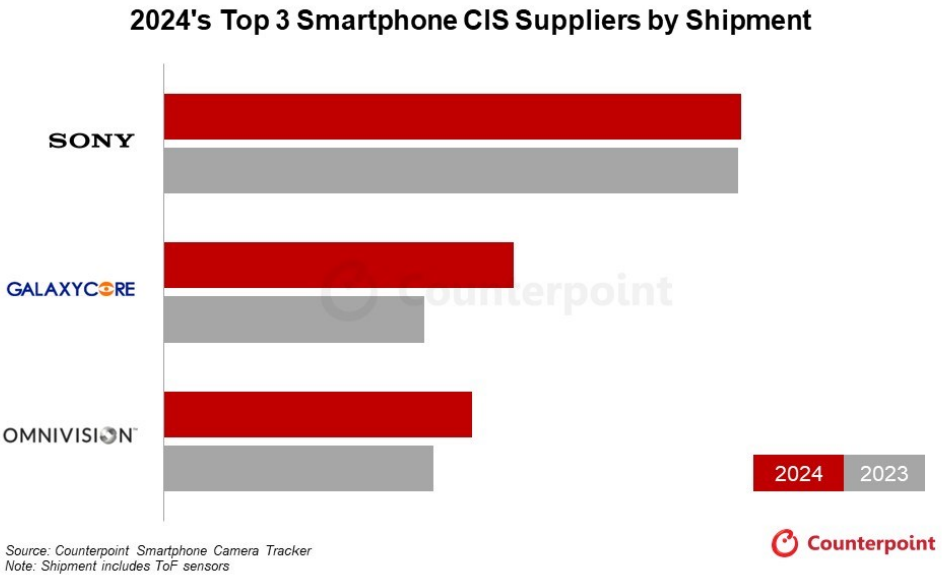
Global Smartphone CIS Shipments Climb 2% YoY in 2024

- *Global smartphone image sensor shipments rose 2% YoY to 4.4 billion units in 2024.*
- *Meanwhile, the average number of cameras per smartphone declined further to 3.7 units in 2024 from 3.8 units in 2023.*
- *Sony maintained its leading position, followed by GalaxyCore in second place and OmniVision in third.*
- *Global smartphone image sensor shipments are expected to fall slightly YoY in 2025.*

Beijing, New Delhi, Hong Kong, London, San Diego, Buenos Aires, Seoul, Taipei, Tokyo – April 25, 2025

Global smartphone CMOS Image Sensor (CIS) shipments rose by 2% YoY to 4.4 billion units in 2024 driven by a recovery in end-market demand, according to Counterpoint's Smartphone Camera Tracker. However, the average number of cameras per smartphone further declined to 3.7 units in 2024 from 3.8 units in 2023, despite the market's recovery.

Sony maintained its leading position in 2024, growing slightly YoY, mainly due to improved production yields and increased demand for premium smartphones. Shanghai-based GalaxyCore ranked second with a 34% YoY increase in shipments. Leveraging its cost-effective advantage, the company has captured more Android orders. Additionally, by shifting to a Fab-lite operational model, GalaxyCore has significantly enhanced product competitiveness, accelerating the launch of high-resolution sensors such as 50MP and further refining its product portfolio.



OmniVision's shipments rose 14% YoY in 2024 driven in part by its expansion in the popular 50MP sensor segment. Offering excellent performance at a more competitive price than rival solutions, its products such as the OV50H image sensor have gained significant traction after launch and have been widely adopted by major Chinese OEMs. Meanwhile, SK Hynix plans to exit the CIS market in 2025 due to intensifying competition. Its

withdrawal could open up new growth opportunities for Chinese suppliers including GalaxyCore and OmniVision.

Looking ahead, technological advancements like LOFIC and multispectral, along with OEMs' ongoing efforts to enhance camera performance, are expected to lift market ASP. However, we expect CIS shipments to see a slight YoY decline in 2025 due to challenges in the global smartphone market stemming from geopolitical tensions and macroeconomic uncertainties. The ongoing reduction in cameras per smartphone also continues to dampen CIS demand.

India Smartphone Shipments Decline 7% YoY in Q1 2025; Premiumization Drives Highest-Ever Q1 Average Selling Price

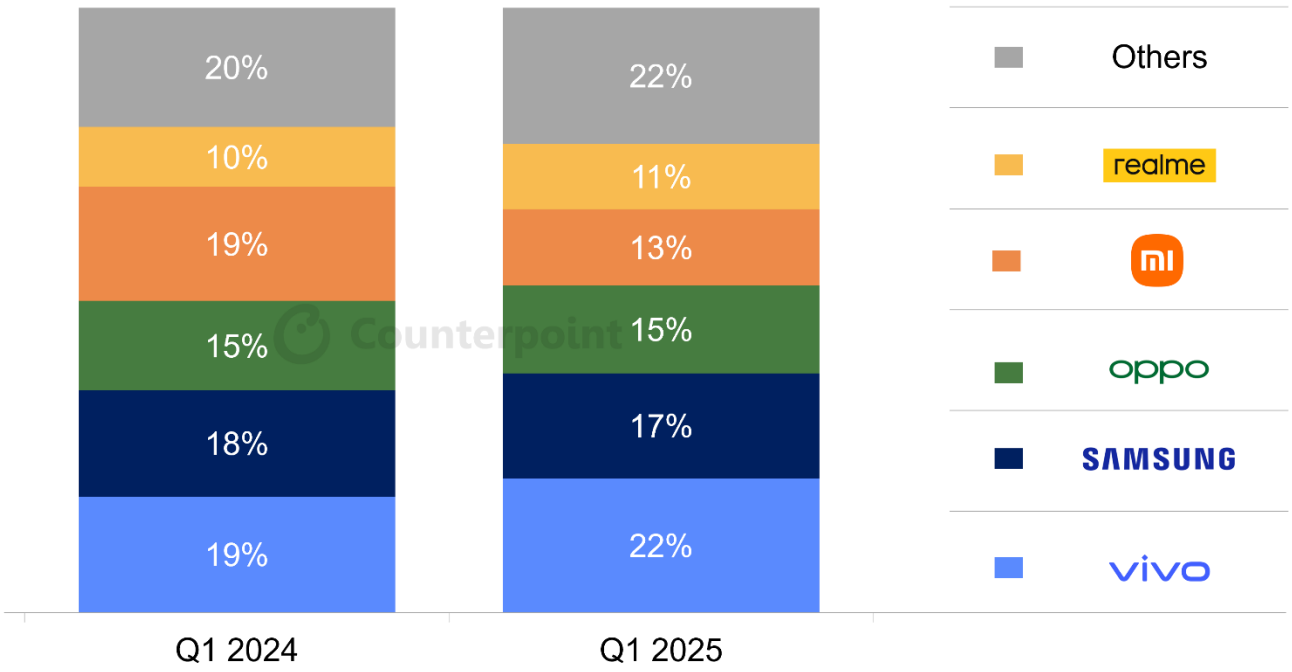
- *In terms of volume, vivo led India's smartphone market for the third successive quarter.*
- *With 29% YoY growth, Apple recorded its highest-ever Q1 shipment volume in India. The brand also led the market in terms of value.*
- *The >INR 45,000 ultra-premium price segment reached its highest-ever Q1 share at 14%, driven by 15% YoY growth, the fastest among all price bands.*
- *As a result, the wholesale ASP reached its highest-ever Q1 level.*

New Delhi, Beijing, Boston, Buenos Aires, Hong Kong, London, San Diego, Seoul – April 30, 2025

India's smartphone shipments in Q1 2025 declined 7% YoY, according to the latest research from Counterpoint's Monthly India Smartphone Tracker**.** The market entered 2025 with high inventory levels, which impacted shipments during the first quarter. Besides, there was a 26% YoY drop in the number of new launches.

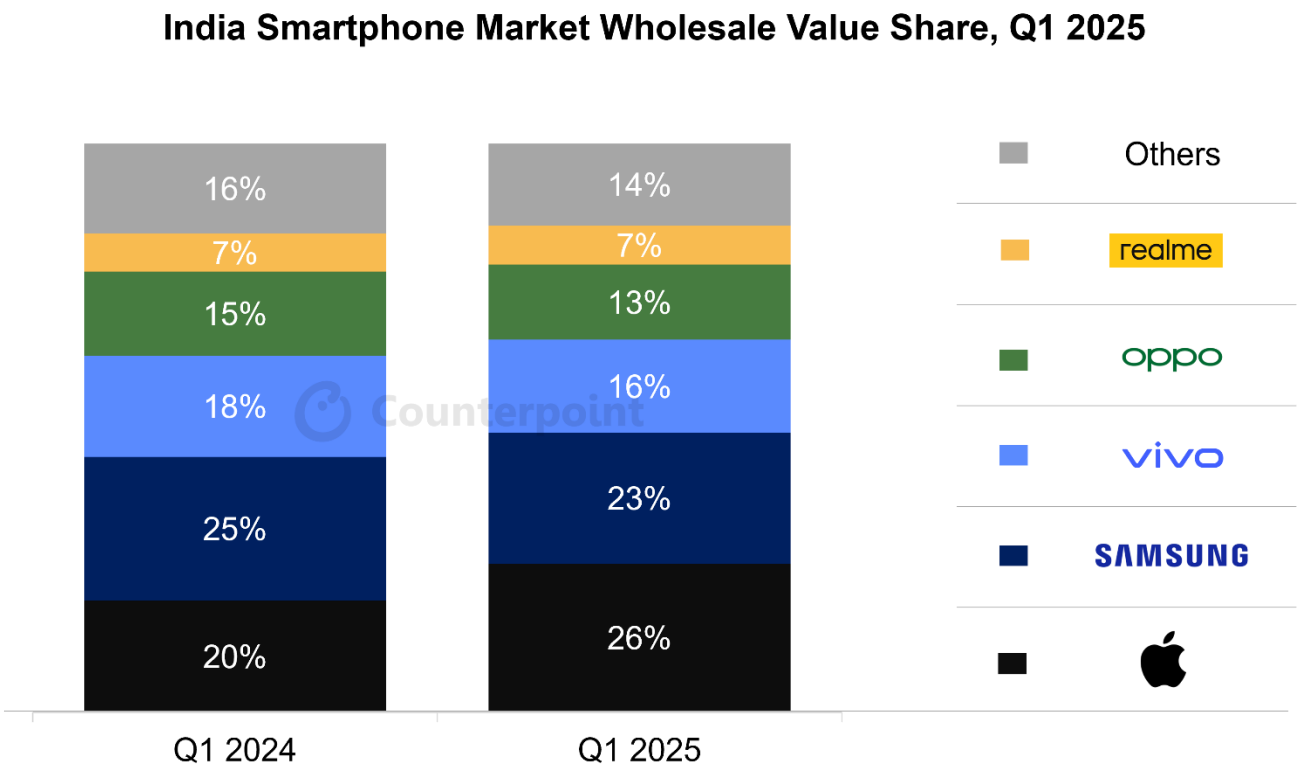
Commenting on the market's volume dynamics, **Senior Research Analyst** Prachir Singh said, "In Q1 2025, India's smartphone market shifted its focus towards preparing for more sustainable and structured growth. Key brands, dealing with high inventory levels, prioritized clearing excess stock to stabilize operations and set a stronger foundation for the remainder of the year. Despite this inventory adjustment, consumer demand for ultra-premium products remained strong. As a result, the ultra-premium segment (>INR 45,000) saw 15% YoY growth, while the average selling price (ASP) increased at an 11% CAGR post-COVID, highlighting a shift toward premium devices. This continued premiumization trend was further supported by growing affordability and expanding financing options, which made high-end devices accessible to a broader consumer base."

India Smartphone Market Volume Share, Q1 2025



Source: Counterpoint Research Monthly India Smartphone Tracker
Notes: Xiaomi includes POCO; OPPO includes OnePlus; vivo includes iQOO; Figures not exact due to rounding

Singh added, “However, despite low inflation and government efforts to push spending, consumer sentiment remained cautious, especially in the budget segment.”



Source: Counterpoint Research Monthly India Smartphone Tracker
Notes: Xiaomi includes POCO; OPPO includes OnePlus; vivo includes iQOO; Figures not exact due to rounding

Commenting on the competition dynamics, Research Analyst Shubham Singh said, “In Q1 2025, **vivo** further strengthened its leadership in India’s smartphone market, recording 9% YoY growth and marking its third consecutive quarter at the top. This performance was largely driven by strong traction for its sub-INR 15,000 offerings, particularly the Y29 5G and T4x models. Samsung climbed to the second spot this quarter, supported by multiple launches across price segments that helped drive momentum. The S series performed well, reaching its highest-ever share within Samsung’s premium portfolio, driven by the S25 ultra series. Meanwhile, Apple continued its strong upward trajectory, recording 29% YoY growth and its highest-ever Q1 volumes in India, further cementing its dominance in the premium segment. This performance underscores the growing appeal of high-end devices across the country, with Apple also leading the market in terms of value.”

OPPO secured the third position, supported by the strong performance of its A3 and K series, which were effectively marketed around durability, an increasingly important consumer consideration. Xiaomi, on the other hand, saw a decline in shipments during the quarter, primarily due to higher inventory levels. This is also the first time since 2016 that Xiaomi has fallen out of the top five in value share. Despite launching the Redmi Note 14 series, Redmi 14C 5G and A4 5G, these models witnessed lower-than-expected consumer traction. This prompted the brand to adopt a more cautious approach, focusing on stock clearance. realme posted a modest 3% YoY growth, driven by portfolio expansion through the new P series and the 14 Pro series.

Other key insights

Nothing was the fastest-growing brand during the quarter, recording a 156% YoY growth driven by the newly launched 3a series. This marked the fifth consecutive quarter where Nothing held the position of the fastest-growing brand in India.

Motorola continued its growth trajectory with a 59% YoY increase, driven largely by strong demand from offline channels.

MediaTek led India's smartphone chipset market with a 45% share, followed by Qualcomm at 32%.

5G smartphones captured a record-high share of 87% in total shipments in Q1 2025. Remarkably, the sub-INR 10,000 segment witnessed an exponential surge in 5G adoption, with its four-digit YoY growth highlighting the accelerated diffusion of 5G into the mass-market entry-level segment.

Offline channels remained strong during the quarter, accounting for 65% of the overall market. Brands ramped up in-store promotions and regional outreach, especially in Tier 2 and Tier 3 cities. The online share was steady at 35%.

Outlook

India's smartphone market is expected to grow at a low single-digit rate this year, driven by a favorable economic outlook and increasing global interest in Indian manufacturing. Lower tariffs compared to China and Vietnam are positioning 'Made in India' devices as a more cost-effective option for US importers, while the potential for enhanced bilateral trade between the US and India could further strengthen the country's appeal as a global smartphone manufacturing hub.

Notes

- Revenue (value) is based on wholesale price.

The comprehensive and in-depth 'Q1 2025 India Smartphone Tracker' is available for subscribing clients.

Feel free to contact us at press@counterpointresearch.com for questions regarding our latest research and insights.The Market Monitor research relies on sell-in (shipments) estimates based on vendors' IR results and vendor polling, triangulated with sell-through (sales), supply chain checks and secondary research.

You can also *visit our Data Section* (updated quarterly) to view the smartphone market shares for the *World*, *US*, *China* and *India*.

Global Smartphone Market Revenue Grew 3% YoY in Q1 2025; Apple, vivo Only Brands to Grow Among Top 5

- *The global smartphone market's revenues grew 3% YoY in Q1 2025, driven largely by Apple, vivo and brands outside of the top five.*
- *ASP in wholesale price terms grew 1% YoY in Q1 to reach $364, the highest ever for a first quarter, driven by the ongoing premiumization trend.*
- *Among the top five OEMs, only Apple and vivo grew in terms of revenue. However, outside the top five, revenues saw double-digit YoY growth led by Huawei and Motorola.*

Seoul, Beijing, Buenos Aires, Hong Kong, London, New Delhi, San Diego, Taipei, Tokyo – May 2, 2025

The global smartphone market's revenues continued growing in Q1 2025, recording 3% YoY growth, the same as for shipments, according to the latest research from *Counterpoint's Market Monitor service*. The average selling price (ASP) grew 1% YoY to reach $364. Despite *tariff*-related uncertainties, the smartphone market maintained its momentum as OEMs strategically stocked up inventory in channels to mitigate potential tariff-driven challenges.

Commenting on the market dynamics in Q1 2025, ***Senior Analyst Shilpi Jain*** said, "The global smartphone market saw modest expansion driven by strategic shifts in production and the growing adoption of *artificial intelligence* (AI) capabilities. Apart from Apple and vivo, the growth in revenue came primarily from brands outside the top five, such as Google, Motorola and Huawei, signaling the ability of other brands to offer a higher value mix and their expanding role in the ongoing premiumization trend."

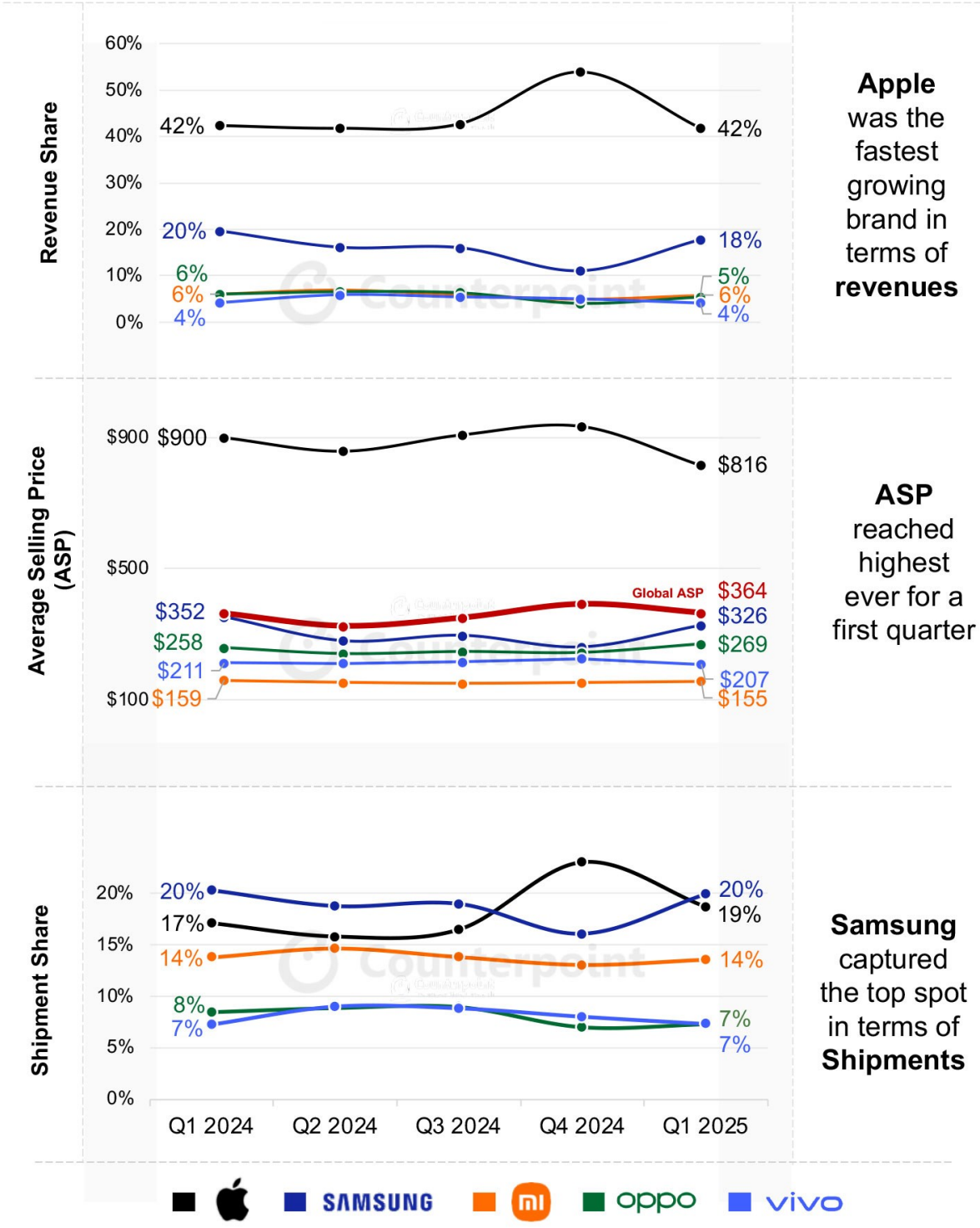
Commenting on Apple's performance, Commenting on Apple's performance, ***Research Director Jeff Fieldhack*** said, "Despite a 9% YoY decline in *Apple*'s iPhone ASP, the brand's revenue remained unaffected. In fact, Apple had the fastest growth among the top five brands, driven by significant growth (12% YoY) in its shipments. The launch of the iPhone 16e during the quarter drove growth in shipments but exerted downward pressure on ASPs. It proved to be a smart move and helped Apple's quarter."

Samsung maintained its dominance in the global smartphone market in terms of shipments, though its revenues were impacted as the ASP declined 7% YoY due to an increasing mix of value offerings in its portfolio.

Among the top five OEMs, OPPO was the only one to grow in ASP terms due to a higher mix of premium models in its portfolio. vivo managed to grow in terms of revenue due to its strong performance in markets like *India.*

Looking ahead, we expect the global smartphone market to decline slightly in 2025 as consumer sentiments and macroeconomic indicators take a dip due to tariff-related market and supply chain uncertainties.

Global Smartphone Market Witnessed YoY Growth in Shipments as well as Revenues in Q1 2025



Apple was the fastest growing brand in terms of **revenues**

ASP reached highest ever for a first quarter

Samsung captured the top spot in terms of **Shipments**

Source: Counterpoint Market Monitor Service Preliminary Data

OPPO includes OnePlus since Q3 2021

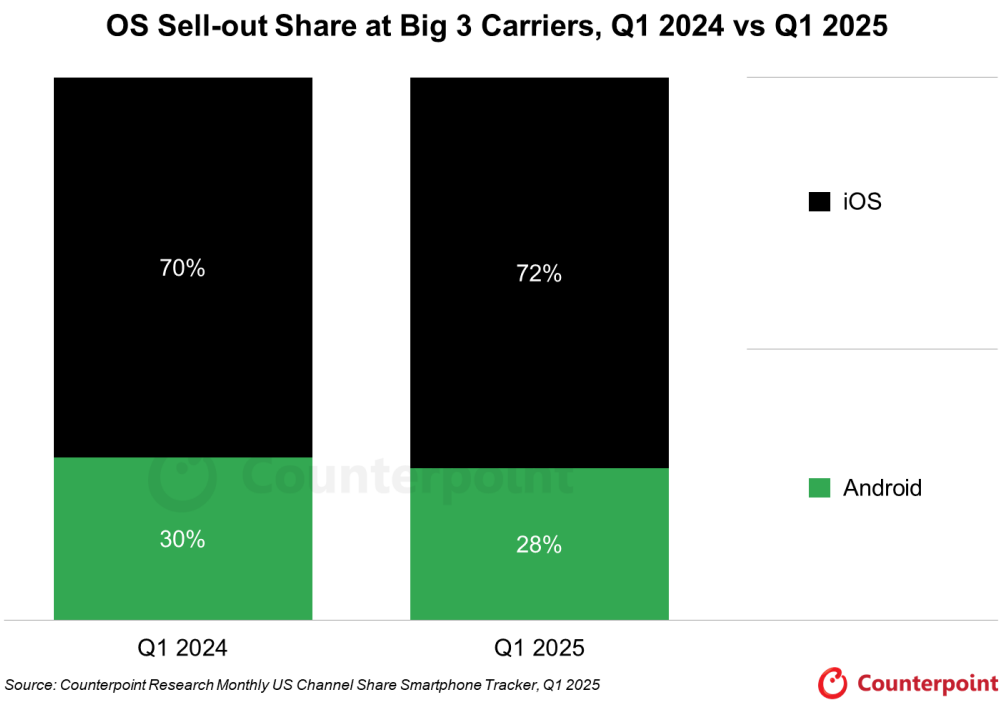
Counterpoint

US Smartphone Sales Fall 2% YoY in Q1 2025 on Drop in Premium Segment

- *US smartphone consumer sales declined 2% YoY in Q1 2025 due to weakness in the premium segment.*
- *Sales in the premium segment ($800 and above) fell 4% YoY primarily due to a decline in demand for Samsung flagships.*
- *Apple's share at the Big 3 carriers increased to 72% in Q1 2025 from 70% in Q1 2024.*
- *Some carriers reported an increase in demand towards the end of Q1 as consumers moved to purchase devices before possible price volatility.*

Fort Collins, Beijing, Buenos Aires, Hong Kong, London, New Delhi, Seoul, Taipei, Tokyo – May 6, 2025

US smartphone consumer sales (sell-out) declined 2% YoY in Q1 2025, according to Counterpoint's *Monthly US Channel Share Smartphone Tracker*. This decline was primarily due to weakening sales in the premium segment ($800 and above) as Samsung's flagship sales dropped YoY, with the Galaxy S series seeing lower demand than it did a year ago. Apple's flagship sales fell YoY as well, but this was offset by sales of the iPhone 16e. The iPhone 16e launch, combined with weakness from Samsung flagships, allowed Apple to increase its share within US postpaid channels. Apple's share of sell-out at the Big 3 carriers increased to 72% in Q1 2025 from 70% in Q1 2024.



In addition to the premium segment decline, the sub-$300 segment also declined by 5% YoY. Despite this weakness, Motorola's sell-out increased by 13% YoY as it capitalized on a lack of device refreshes from competing OEMs like HMD, and smaller brands scaling down operations in the US market. Motorola launched its 2025 G-series device lineup earlier than it did in 2024, which provided an earlier bump to sales during tax season.

“Carriers have attempted to offset market weakness by prioritizing strong device promotions,” said ***Senior Research Analyst Maurice Klaehne***, adding, “We have seen some of the largest *promotional offers* ever for smartphones in Q1 2025. Verizon and AT&T both had promo offers to get the Samsung Galaxy S25 Ultra for free in Q1, something which had never before happened with a Galaxy Ultra device. This shows an increased urgency by carriers to draw customers to premium devices and newer service plans.”

Total device sales by the Big 3 carriers stayed relatively flat YoY. While *AT&T* and *T-Mobile’s* smartphone sales increased YoY (5% and 2%, respectively), thanks to improved upgrade rates, *Verizon’s* declining upgrade rate in Q1 offset those gains (-6% YoY). Some carriers reported an increase in demand in late March and April due to the US government’s latest move to impose tariffs, as customers moved to purchase products before possible price increases.

With the current *tariff situation* failing to provide any clarity, uncertainty persists over how the US smartphone market will play out through the rest of 2025. In Q1, some OEMs began to build up device inventories within the US to hedge against possible tariff outcomes.

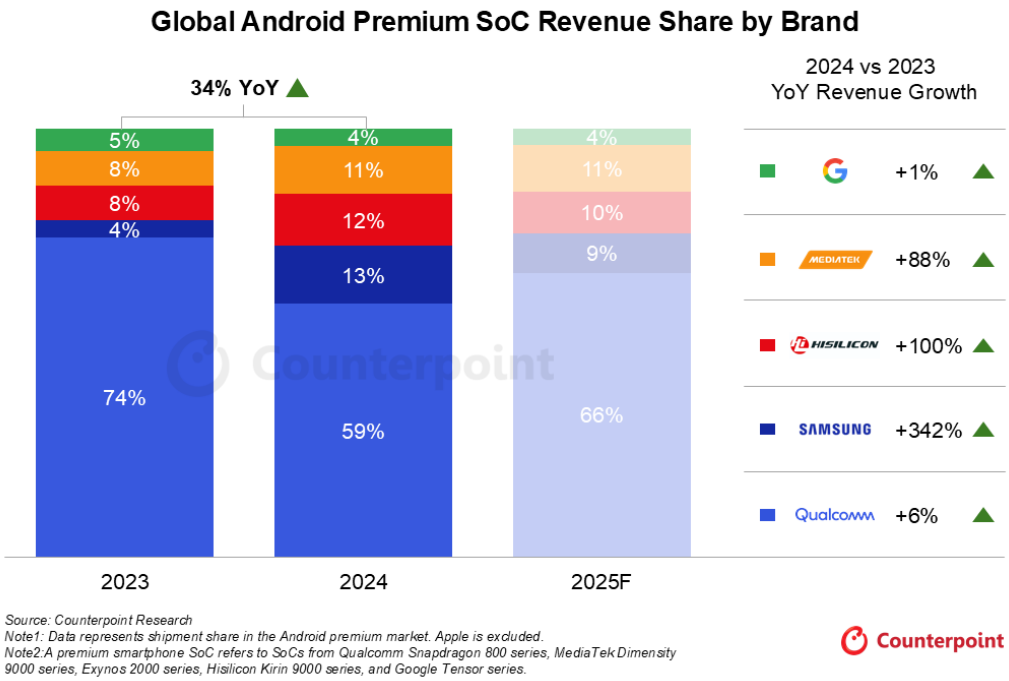
Research Director Jeff Fieldhack said, “We have seen OEMs with high production rates in China, such as Apple, Motorola and TCL, ship an increased number of units to the US and build up inventories that could get them through summer without having to increase prices if current tariffs on China stand. For other OEMs like Samsung, whose production is centered outside China, there has been less of a build-up.”

Premium Smartphone SoC Revenues Rise 34% YoY in 2024, Account for Half of Total Android Smartphone SoC Revenues

- *Android premium smartphone SoC revenues grew 34% YoY in 2024, driven by increasing demand for premium smartphones and introduction of more powerful AI-capable platforms.*
- *Qualcomm remains the market leader growing 6% annually. Although, the vendor lost share in Samsung Galaxy S24 series to Samsung's Exynos, it will regain share in 2025 as the Samsung Galaxy S25 series has exclusively chosen the Snapdragon 8 Elite SoC.*
- *Samsung recovered revenues with Exynos design wins in the Galaxy S & A series, growing revenues by 4x annually. However, it will likely dip in 2025 again, highlighting Exynos' inconsistent performance.*
- *HiSilicon saw a strong comeback in China's premium market, capturing a 12% revenue share in 2024, driven by a loyal customer base and deep integration with the Harmony OS. In 2025, Huawei is expected to retain its position as the third largest brand by revenue share in the Android premium segment.*
- *MediaTek's premium smartphone SoC revenues almost doubled, driven by strong performance of the Dimensity 9300 series and the launch of Dimensity 9400.*

Seoul, Beijing, Shenzhen, Hong Kong, New Delhi, Boston, London, Taipei, Tokyo – April 7, 2025

Premium Android Smartphone SoC revenues grew 34% YoY in 2024 driven by strong consumer preferences for premium smartphones, according to Counterpoint Research's Q4 2024 Global Smartphone SoC Revenue and Forecast Tracker. The revenue growth was also driven by a rise in shipments and higher ASPs.



Overall Growth Trends and Uncertainties

Commenting on the global premium smartphone SoC market, Counterpoint Senior Analyst Parv Sharma said, “The segment accounted for 52% of the total Android smartphone SoC revenues in 2024. Competition has increased with HiSilicon’s re-entry and MediaTek’s emergence. The ASP and revenue growth for SoCs is being driven by on-device AI capabilities, with powerful NPUs and larger die sizes driving demand migration to advanced nodes, which in turn result in an increase in semiconductor content and wafer costs.”

On global trade dynamics, Sharma commented, “While the premium market’s growth remains strong, the ongoing tariff uncertainties present risks for brands with higher exposure to China and looking to diversify. Apple is looking to diversify, but the assembly of Pro/ProMax models outside China will take time. On the Android side, Google and Motorola are more under the scanner, while Samsung is better placed, with its diversified manufacturing base presenting an opportunity for Qualcomm to grow its share in the important US market.”

Qualcomm Maintains its Lead in the Premium Market and MediaTek Gains Momentum

Qualcomm dominates the global premium Android SoC market driven by Samsung and Chinese OEM partners. Meanwhile, MediaTek’s growth is currently focused on the China market mainly through vivo and some exposure to OPPO premium smartphones.

Commenting on Qualcomm and MediaTek’s growth, **Counterpoint Research Analyst Shivani Parashar** said, “In 2025, Qualcomm will maintain a dominant position in the premium Android SoC market, driven by its exclusive partnership with Samsung for the Galaxy S25 series and design wins across every Android OEM, except Google Pixel. Qualcomm introduced custom Oryon cores in the Snapdragon 8 Elite which are good at latency-critical tasks and distributing AI workloads. Qualcomm leads with its AI stack and partnerships across the ecosystem, offering streamlined experiences for deploying on-device AI using optimized models and software/APIs.”

Parashar added, “Meanwhile, MediaTek has emerged as a strong contender in the premium SoC market. It has strategically partnered with OEMs like vivo, OPPO and Xiaomi for premium offerings and carved out a space for itself in the premium SoC market. With the latest Dimensity 9400, MediaTek has shown an impressive CPU and AI performance with a focus on efficiency and value. For continued growth, MediaTek will have to focus on global flagship brands, developer partnerships and trust.”

Samsung's Premium Revenue Grew Multifold, while HiSilicon Re-entered the China Premium Market

Samsung’s premium revenues jumped 4x in 2024 driven by strong Galaxy S24 sales, but will likely decline in 2025 due to no design wins in the in-house Galaxy S25 series. In 2024, HiSilicon made a strong comeback in China with the Pura 70 and Mate 70 series. It is also expected to remain the third-largest premium Android brand by revenue in 2025.

Commenting on Samsung and HiSilicon’s performance, **Counterpoint Research Analyst Akash Jatwala** said, “The adoption of Exynos 2400 across the Galaxy S24 series helped Samsung grow its revenue multifold in 2024 while also being supported by its rising share in other mid-tier and high-tier models. However, foundry issues have affected Exynos’ adoption in premium smartphones. The growth in adoption will depend on how fast Samsung foundry can scale the next-generation premium SoC on 2nm with better yield rates.”

Commenting on HiSilicon’s performance, **Jatwala** said, “HiSilicon has a strong and loyal customer base in China, and HiSilicon’s Pura 70 series and Mate 70 series helped it gain share in 2024. In 2025, HiSilicon will retain its position as the third biggest brand in terms of revenue share, driven by its premium smartphones inching closer to MediaTek, despite a couple of older generation process node-based SoCs. However, growth will remain uncertain in the long-term due to supply chain uncertainties, adoption of leading nodes and limited geographical presence stemming from the lack of Google Mobile Services.”

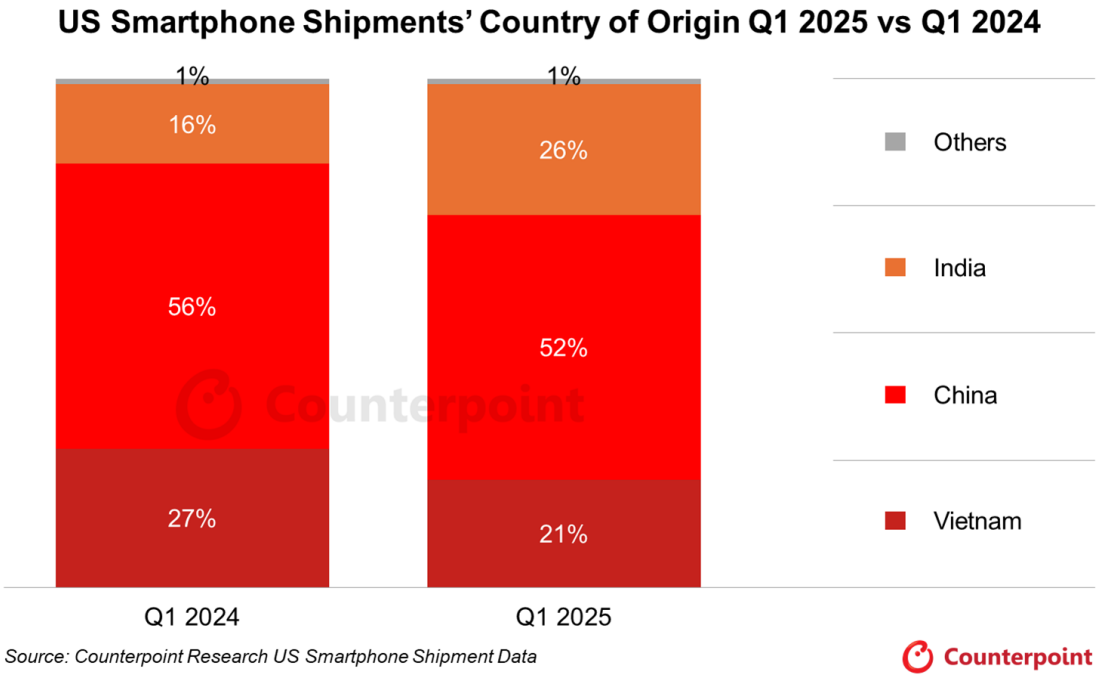
US Smartphone Shipments in March Surged 30% YoY in Response to Tariffs

- *Total smartphone shipments surged 30% YoY, supported by increases across OEMs to beat tariffs.*
- *Tariffs drove a shift in the country-of-origin mix away from China in Q1 2025, with a strong uptick in shipments from India in March.*
- *Devices manufactured in India represented 26% of shipments in Q1 2025, up from 16% in Q1 2024.*
- *Apple's sell-in grew 42% YoY in March as the company rushed inventory into the US ahead of the Trump administration announcing a raft of tariffs on April 2.*
- *Samsung's sell-in grew as well in March, but up a more modest 4% YoY.*

Fort Collins, Beijing, Buenos Aires, Hong Kong, London, New Delhi, Seoul, Taipei, Tokyo – May 14, 2025

Ahead of the Trump administration announcing a raft of tariffs on April 2, smartphone shipments surged 30% YoY in March as OEMs across the board raced to bring inventory into the country to beat these tariffs. Shipment volumes increased across the major smartphone exporting countries like China, India and Vietnam. This increased US inventories by 51% YoY for March, according to Counterpoint's US Smartphone Inventory Tracker.

Tariffs drove a shift in the country-of-origin mix away from China in Q1 2025 with a strong uptick in shipments from India in March. Apple, Samsung and Motorola all saw their shipment contribution from India increase. Motorola nearly tripled its volume from India in March YoY and Samsung leaned more heavily on India to produce the Galaxy A16. India-manufactured devices represented 26% of Q1 2025 shipments, up from 16% in Q1 2024.



Apple's sell-in grew 42% YoY in March as it rushed units into the US to avoid the most severe impact of tariffs placed on China. Inventory in Q1 climbed to a record number of weeks to help keep prices stable through the summer. Shipments from India increased disproportionately YoY, whereas China saw a less dramatic bump.

Some of that increase also spilled over into the first week of April. “The increase in shipments in March and early April will help insulate Apple from potential immediate pricing impacts in the US through mid-to-late summer. Should the tariff situation remain unresolved with China by the time the iPhone 17 ships, we expect India to become the primary provider for US-bound iPhone 17 devices,” said Senior Research Analyst Gerrit Schneemann.

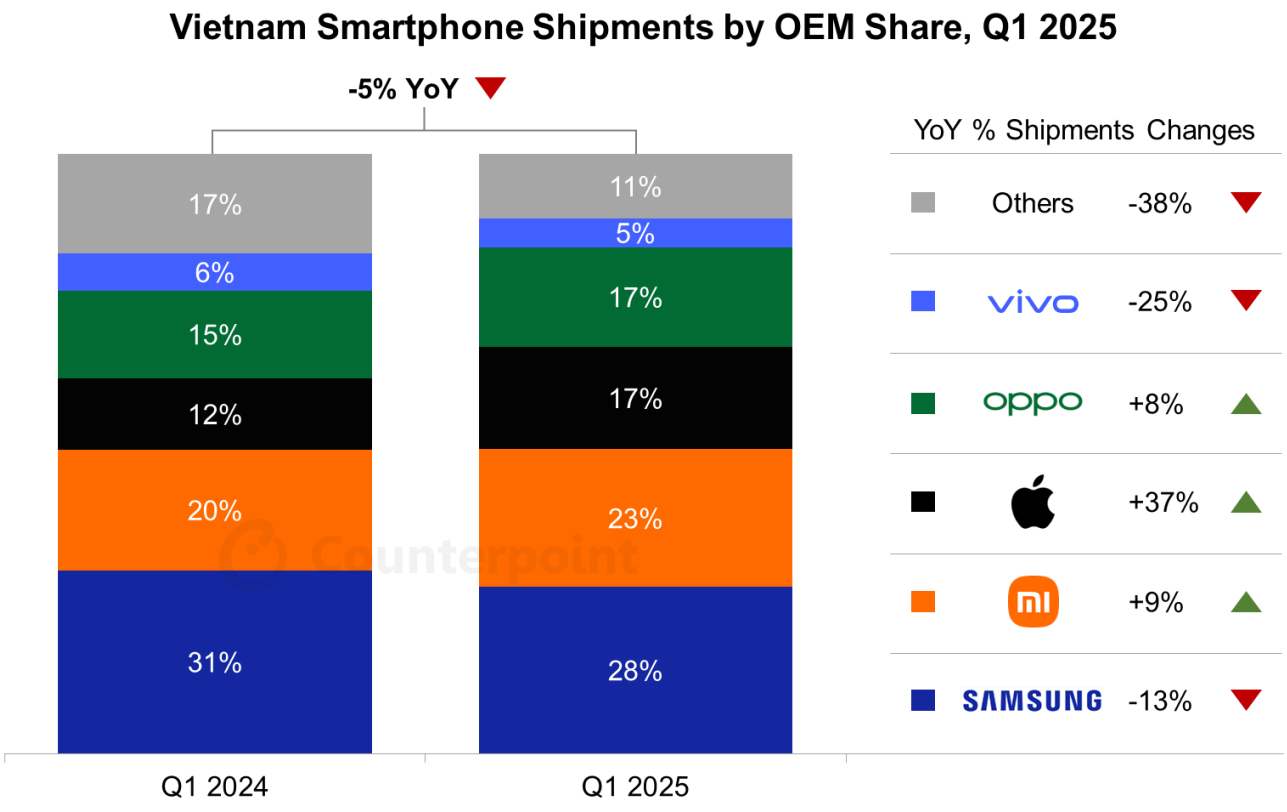
Samsung’s sell-in grew a modest 4% YoY in March. The initial Vietnam tariff actions came as a surprise to many, as the first Trump administration had focused its tariff policy exclusively on China. Samsung is far less reliant on China than others, and therefore, was in a good position to avoid being directly impacted. However, the company now faces tariffs itself. Samsung also has a different portfolio and launch structure, given the usual mid-year launch of its foldable devices. This year, it is also launching the Galaxy S25 Edge in May. As a result, it is not necessarily able to consolidate shipments in the way that Apple does. However, Samsung’s position is still strong given the ongoing talks between Vietnam and the US and a 90-day pause on the initially proposed 46% reciprocal tariffs. Samsung is hoping those discussions result in a trade deal that will help it avoid price increases.

Vietnam Smartphone Shipments Decline in Q1 2025; Apple Fastest-Growing Among Top Brands

- *Vietnam's smartphone shipments declined 5% YoY in Q1 2025.*
- *Samsung underperformed primarily due to delays in the Galaxy S25 series' availability.*
- *Apple's shipments grew 37% YoY, helping it hold a position among the top three for the second consecutive quarter.*
- *Xiaomi also maintained healthy growth on the back of record sales of its Redmi Note 14 series.*
- *Premium will continue to be a strong theme this year as more operators roll out 5G services.*

Jakarta, Beijing, Buenos Aires, Fort Collins, Hong Kong, London, New Delhi, Seoul, Taipei, Tokyo – May 13, 2025

Vietnam's smartphone shipments decreased by 5% YoY in Q1 2025, according to **Counterpoint's Monthly Vietnam Smartphone Tracker**. The country's economy is on a growth trajectory, having achieved its highest Q1 GDP growth in five years. While sectors like manufacturing and agriculture continued to show growth in Q1, they were not able to impact the smartphone market positively. Further, in February, the retail sector experienced a sluggish demand as households tightened budgets after the Lunar New Year holidays. During the quarter, smartphone OEMs prioritized launching new models before the Tet festival, while retailers offered discounts and promotions to boost sales.



Source: Counterpoint Research Monthly Vietnam Smartphone Tracker
Note: Figures not exact due to rounding

Samsung led the market in Q1 2025 with 28% shipment share. The brand delayed the release of its flagship Galaxy S25 series in Vietnam by a few days as it faced logistical and marketing issues due to Tet festival, which occurred at the end of January. But Samsung was aggressive in March and launched multiple A series models to regain volumes.

Xiaomi registered 9% YoY growth, jumping to second position in Q1 2025 from fourth in the previous quarter. The Redmi Note 14 series was popular among consumers, which drove the brand's shipments by recording more than 350,000 shipments across the quarter. In order to expand its footprint in the country, Xiaomi signed an agreement with Mobile World Group for the distribution of its electronic devices, electrical appliances and IoT products.

Apple's shipments increased by 37% YoY in Q1 2025, helping the brand hold its top-three position for the second consecutive quarter. The iPhone 16e launch received a lukewarm response from Vietnamese consumers, with the iPhone 16 Pro Max remaining the brand's top model. The discounts offered during the Tet festival sales made iPhone an attractive offering for consumers for premium models.

The wholesale price band of sub-$200 contributed to just 50% of smartphone shipments in Vietnam during the quarter, its lowest ever. Availability of financing options, preference for advanced features and 5G connectivity are helping consumers skip the price band. $200-$400 was the fastest-growing price segment in Q1 2025 with 19% YoY growth. Samsung led this segment, followed by OPPO.

5G share in Vietnam's smartphone shipments reached 46% in Q1 2025, its highest ever. Mobifone was the latest operator to roll out 5G services in the country in Q1 2025, after Viettel and VNPT in the previous quarter. Telecom operators have been upgrading infrastructure, expanding services and lowering prices to attract users. The adoption of 5G has also improved Vietnam's internet ranking.

Outlook

The tariffs imposed by the US could pose a threat to Vietnam as exports form a substantial part of its GDP. However, the premium smartphone segment is expected to remain unaffected by these developments. The decline in lower price bands' contribution also indicates the increasing affordability of smartphones as well as preference for higher price bands and better features. We expect the 5G smartphone shipments to continue to rise as the coverage increases across the country, making the technology accessible to a broader base.

Samsung Galaxy S25 Edge: Snapdragon 8 Elite, Galaxy AI, 200MP Camera and Titanium Body in Ultra-slim Design

- *The Galaxy S25 Edge is the slimmest (5.8mm thin) and lightest (163g) Samsung smartphone yet.*
- *Powered by Qualcomm's Snapdragon 8 Elite, the Galaxy flagship SoC enables hybrid Galaxy AI GenAI features including Google's Gemini Live and more.*
- *Priced at $1,099, sits between the Galaxy S25+ and Galaxy S25 Ultra, with the tradeoffs being battery capacity and telephoto camera.*
- *Samsung's launch comes amid rumors of Apple launching a thin iPhone version later this year.*

Samsung recently launched the Galaxy S25 Edge which was teased as the slimmest Galaxy smartphone at the S25-series launch earlier this year. Being an S-series smartphone, The S25 Edge aims to deliver flagship performance and premium experience in a sleek and lightweight form factor. Prices start at $1,099 for the base model with 12GB of RAM and 256GB storage. Meanwhile, the 512GB storage model is set to go on sale starting May 30.

At just **5.8mm thin** and **weighing 163g**, this is Samsung's thinnest flagship smartphone in years, showcasing the South Korean company's engineering prowess. The frame is made of Titanium which makes it stronger, yet lighter. The S25 Edge launch comes at a time when competitors like TECNO and HONOR showcased their sleek and slim smartphones at MWC 2025, and even Apple is rumored to launch a thin and light smartphone later this year.

To attain the thin form factor, Samsung had to make sacrifices in the battery and camera department. The Galaxy S25 Edge comes with a 3,900mAh battery, which is a miss compared to the competitors that are packing bigger capacity, high-density Silicon Carbon batteries. While there is fast charging support, it is limited to 25W, whereas competitors are offering 65W-120W fast charging. The smartphone also misses out on a telephoto camera yet delivers on key aspects of the flagship Galaxy-S experience, in a thin chassis.

Slimmest High-Res Camera and Flagship SoC in a Sleek Design

The Galaxy S25 Edge comes with a 6.7-inch QHD+ LPTO Dynamic AMOLED 2X display with 120Hz adaptive refresh rate (1-120Hz), same as the Galaxy S25+. The screen is protected by Corning Gorilla Glass Ceramic 2. Under the hood is a powerful 3nm Snapdragon 8 Elite for the Galaxy SoC, another great design win for Qualcomm showcasing no compromise in performance over thin form factors. The thermal architecture also had to be tweaked to have a wider surface area to dissipate heat and maximize cooling. The S25 Edge is available in two memory variants, 256GB/512GB, and higher capacity 12GB of RAM for smooth performance and faster AI processing.

Samsung’s engineers faced another big challenge of fitting a high-performance lens into an ultra-thin frame. The camera module structure had to be reconfigured to be shorter and slimmer, and the result is the smallest high-resolution camera ever made by Samsung. The Galaxy S25 Edge is equipped with a 200MP main camera with F/1.7 wide aperture, Optical Image Stabilization (OIS) and 2x optical quality lossless zoom. It also includes features like Nightography for bright and crisp low-light photo and video capture. The device supports LOG mode video capture, allowing creators to color grade in post-processing. There is also a secondary 12MP ultrawide camera with f/2.2 aperture. Up front, there is also a 12MP camera with f/2.2 aperture and support for LOG video capture.

Model	 Samsung Galaxy S25 Plus	 Samsung Galaxy S25 Edge	 Samsung Galaxy S25 Ultra
Dimensions	Approx. 158.4 x 75.8 x 7.3 mm	Approx. 158.2 x 75.6 x **5.8 mm**	Approx. 162.8 x 77.6 x 8.2 mm
Weight	Approx. 190 g	Approx. **163 g**	Approx. 218 g
Build	Armor Aluminum 2, Gorilla Glass Victus 2	Titanium Frame, Gorilla Glass Ceramic 2 (Front)	Titanium Frame, Corning Gorilla Armor 2 (Front & Rear)
Display Size	6.7-inch	6.7-inch	6.9-inch
Display Type	Dynamic LTPO AMOLED 2X	Dynamic LTPO AMOLED 2X	Dynamic LTPO AMOLED 2X
Resolution	QHD+ (1440 x 3120 pixels)	QHD+ (1440 x 3120 pixels)	QHD+ (1440 x 3120 pixels)
Refresh Rate	1Hz-120Hz Adaptive	1Hz-120Hz Adaptive	1Hz-120Hz Adaptive
Peak Brightness	Up to 2600 nits	Up to 2600 nits	Up to 2600 nits (with Anti-reflective coating)
Processor	Qualcomm Snapdragon 8 Elite for Galaxy (Octa-Core)	Qualcomm Snapdragon 8 Elite for Galaxy (Octa-Core)	Qualcomm Snapdragon 8 Elite for Galaxy (Octa-Core)
RAM	12GB	12GB	12GB
Storage	256GB, 512GB	256GB, 512GB	256GB, 512GB, 1TB
Rear Camera	Triple: 50MP Main (f/1.8, OIS), 12MP Ultra-Wide (f/2.2), 10MP Telephoto (f/2.4, 3x Optical Zoom, OIS)	Dual: 200MP Main (f/1.7, OIS, 2x Optical Quality Zoom), 12MP Ultra-Wide (f/2.2, Autofocus)	Quad: 200MP Main (f/1.7, OIS), 50MP Ultra-Wide (f/1.9, Autofocus), 10MP Telephoto (f/2.4, 3x Optical Zoom, OIS), 50MP Periscope Telephoto (f/3.4, 5x Optical Zoom, 100x Space Zoom, OIS)
Front Camera	12MP (f/2.2)	12MP (f/2.2)	12MP (f/2.2)
Battery	4,900mAh	3,900mAh	5,000mAh
Wired Charging	45W	25W	45W
Wireless Charging	15W (Qi), Wireless PowerShare	15W (Qi), Wireless PowerShare	15W (Qi), Wireless PowerShare
Operating System	Android 15 with One UI 7	Android 15 with One UI 7	Android 15 with One UI 7
Water/Dust Resistance	IP68	IP68	IP68
Price	$999	$1,099	$1,199

Galaxy AI with Google's Multimodal Gemini and Agentic AI Integration

Despite the S25 Edge's slim design, Samsung continues to deliver on Galaxy AI features maintaining consistency across the S25 series. The smartphone comes with a host of Gen AI features such as Writing Assist to compose texts and emails, proofread text and more. There is drawing assist to turn your rough sketches into art, AI features to remove distraction/objects from your photos, portrait effects to turn your photos into art and much more. In videos, using Audio Eraser, you can remove wind noise and focus on clear vocals.

Samsung is also closely working with Google to enable Gemini AI experiences, including Gemini Live for Galaxy users, and popular Circle to Search feature with a dedicated button to invoke Gemini. Samsung's Now Brief displays real-time information and controls for active apps like music players or timers on the lockscreen. Now Brief, which offers personalized updates and summaries from news, calendar events and more, is also available on the Galaxy S25 Edge.

While Galaxy AI integrates hybrid AI, Samsung's Knox Vault ensures user data privacy and security. The smartphone runs on Android 15 OS with One UI 7 on top.

Analyst Takeaways

With the Galaxy S25 Edge, Samsung is focusing on slim design and portability as a differentiator, while delivering a flagship experience with premium features like Galaxy AI.

It bridges the gap for consumers not yet embracing larger form factors, delivering a feature-rich experience in a more established design.

The S25 Edge also showcases Samsung's engineering capabilities, highlighting display innovation and advanced features.

Samsung's mid-year S-series flagship launch is a departure from the annual release cycle, but this strategy can be seen as an effort to capitalize on the quiet period to maintain momentum and gain some market share in the premium segment.

Going forward, we see such SKUs as a line extension from multiple OEMs, especially in the premium portfolio. Samsung has smartly named it as a different Edge variant while maintaining differentiation with the S-series.

The Galaxy S25 Edge launch also gives Samsung a competitive edge in positioning ahead of Apple's rumored thin and light iPhone 17 Air launch later this year.

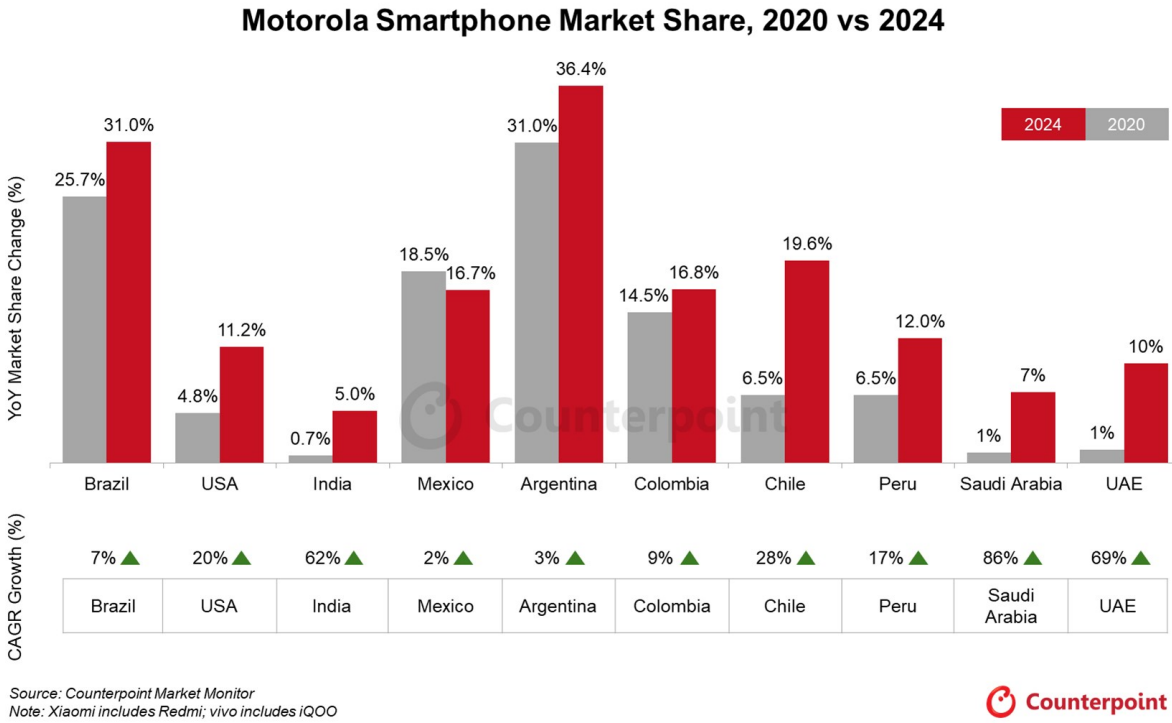
BONUS: How to use Galaxy AI Features on Samsung Galaxy S24 Series

Motorola’s 2024 Smartphone Shipments Hit Record High, Driven by Affordability and Diversification

- *Motorola’s smartphone shipments rise 24% YoY in 2024, hitting their highest ever level.*
- *India emerged as the breakout market, accounting for 13% of Motorola’s global smartphones in 2024 while growing 82% YoY.*
- *LATAM maintained its dominance with almost half of Motorola’s total shipments, driven by Brazil and Mexico, while North America showed a strong recovery in 2024.*
- *Motorola maintains a strong position in the entry to mid-tier range (<$250), yet the growing traction is in the $250–$399 segment hints a move towards premium products.*

Motorola is often left out in the discussion on top-table smartphone makers, but its performance over the last five years tells a different story. The brand has nearly doubled its global smartphone shipment volumes from 2020 to reach its highest ever shipments in 2024. The brand has grown with a CAGR of 15% over the period, becoming the world’s seventh largest smartphone brand in terms of volume in 2024.

What is truly remarkable is not just the number, it is where the growth is coming from. *Motorola* is one of the few brands that has managed to recover following the 2022 market downturn while also surpassing its pandemic era peak shipment levels. Although the overall global smartphone market’s shipments in 2024 were below 2020 levels, Motorola's shipments in 2024 were a remarkable 75% higher than its 2020 levels. This momentum was driven by Motorola’s strong regional performance and its strengthening performance in emerging markets. The strategic focus on affordability and diversification has helped Motorola gain consistent market share across multiple key regions.



Access to the full report *here*
If you are not a client, reach out to us at *info@counterpointresearch.com*

Apple Intelligence Review – Part 1: Writing and Summarization Shine, But Notification Handling Needs Smarts

- *Apple joined the AI smartphone race with its 'Apple Intelligence' suite of GenAI features, aimed at boosting productivity and generating new content.*
- *The Apple Intelligence features are deeply integrated within the Apple ecosystem devices such as iPhones, iPads, Macs and Vision Pro.*
- *In the first of our three-part series, we explore the practical applications of Writing Tools, Summarization and Notification Management, highlighting how Apple has integrated these features system-wide, and where there is room for improvement.*

Artificial Intelligence (AI), especially with Generative AI (GenAI), is on track to become the new differentiator and value-add for the smartphone industry. While Samsung got the headstart in early 2024 with its Galaxy AI, launched through partnerships with Google and Qualcomm, Apple and others since then have been rolling out their AI capabilities. According to Counterpoint Research's AI 360 Service, GenAI smartphone shipments are likely to exceed 400 million in 2025, capturing one-third of the global market. We also expect Samsung and Apple to dominate the GenAI smartphone market in the early years.

Alongside the launch of the iPhone 16 series, Apple announced its AI strategy with Apple Intelligence. But Apple has been gradually rolling out these capabilities, starting with iOS 18.1. We have been testing Apple Intelligence features across the powerful iPhone 16 Pro, MacBook Pro 16 (M1 Pro) and Apple Vision Pro for the last couple of months, and will analyse them in a three-part series, with this first part focusing on Writing Tools, Text Summary and Notification Management.

Apple Intelligence Compatibility: iPhones, iPads, Macs and Vision Pro for cross-device play

Apple Intelligence is available across the iPhone 16 series and iPhone 15 Pro/Pro Max devices running iOS 18. It is also available for iPads running iPadOS 18 with the A17 Pro SoC (iPad mini), and iPad models with the M1 SoC and later. All Macs powered by the M1 and later chips and running macOS Sequoia get Apple Intelligence features. But that's not all, Apple's Mixed Reality headset Vision Pro also gets some of the Apple Intelligence features with the Vision OS 2 update. Apple's tighter hardware and software integration and wider ecosystem make it possible to have a consistent experience across platforms and devices.

If you have a compatible device, head over to **Settings > Apple Intelligence & Siri** and toggle the switch to turn on Apple Intelligence on your iPhones and iPads. In case of a Mac, head over to the **Apple icon** on the top left and then **Apple Intelligence & Siri** before toggling to turn it on.

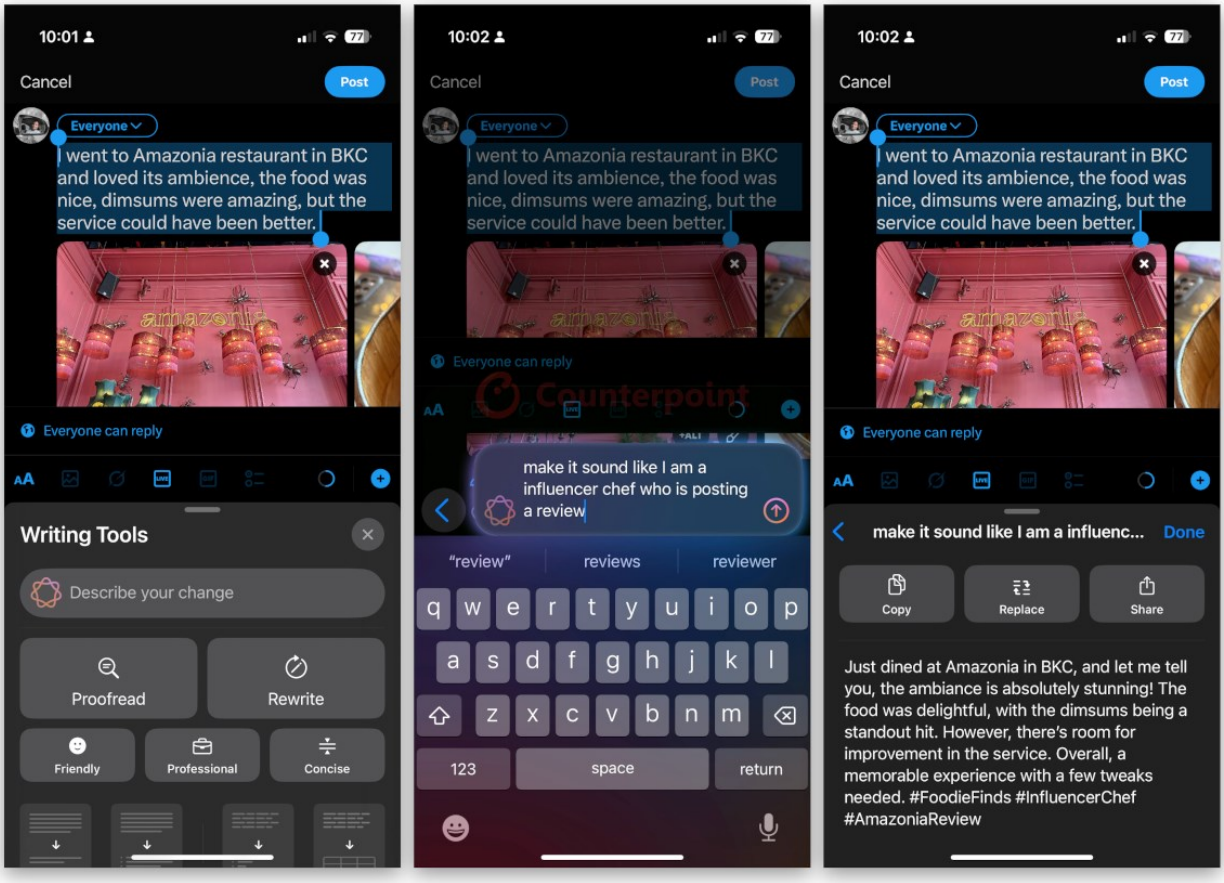
Writing Tools: Compose, Proofread, Refine - AI Help Across Your Apps

Most AI tools are designed to boost productivity. To test the capabilities of Apple Intelligence Writing Tools across devices and apps, we created a series of prompts to try them out. In general, the Writing Tools work across the OS and almost every app, from Notes to Email, Microsoft Teams and Text Messaging to social media platforms like X (formerly Twitter), but except Meta apps like Facebook, Instagram and WhatsApp. Below is our analysis of Apple Intelligence Writing Tools.

To **use the Writing Tools**, you will first need to **select the text** or double tap on empty space and then **tap on Writing Tools** (or the Apple Intelligence icon) depending on which app you are in.

Describe your change: Beyond rewriting, rephrasing and changing tense

The first option in Writing Tools, **"Describe your change"**, lets you do multiple things, like changing the way the text reads, paraphrasing it, or changing its tense. To test the tool, we wrote a small caption for an X post reviewing a restaurant and asked AI to change it to sound like a food reviewer's post. This feature needs an internet connection to work.

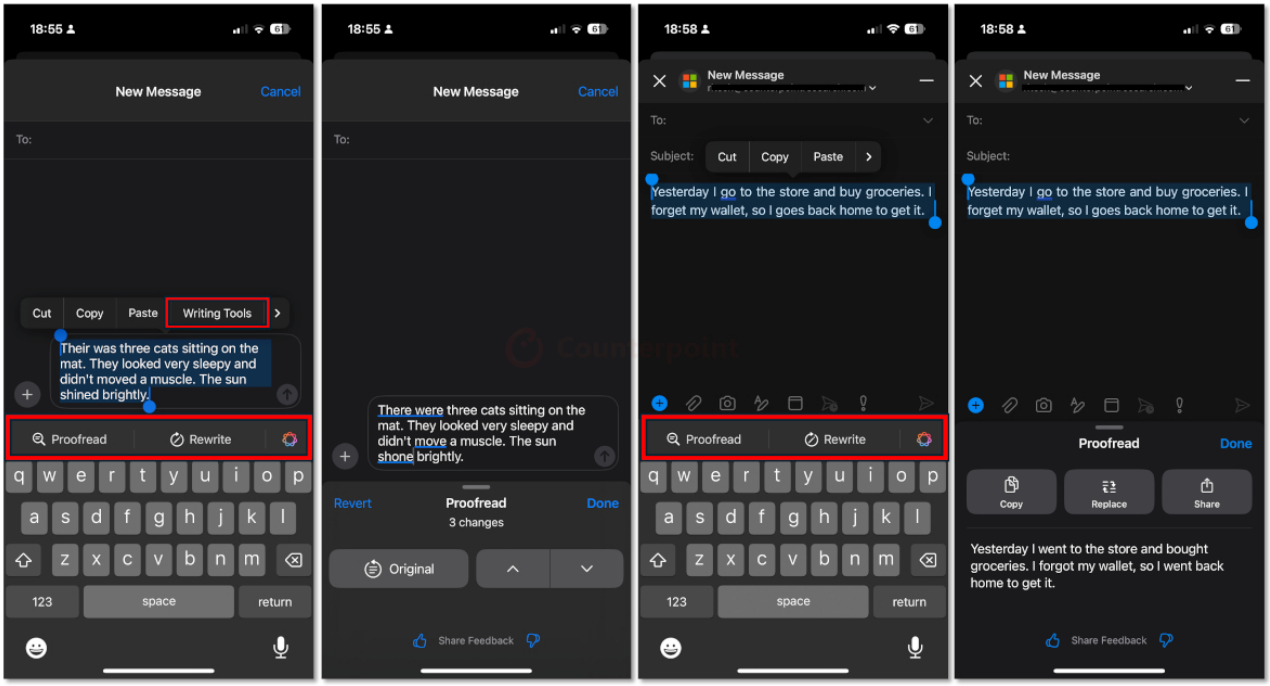


Next, we asked the AI to paraphrase a sentence in three different ways, followed by asking it to change the tense from past to future, both of which it did effortlessly.

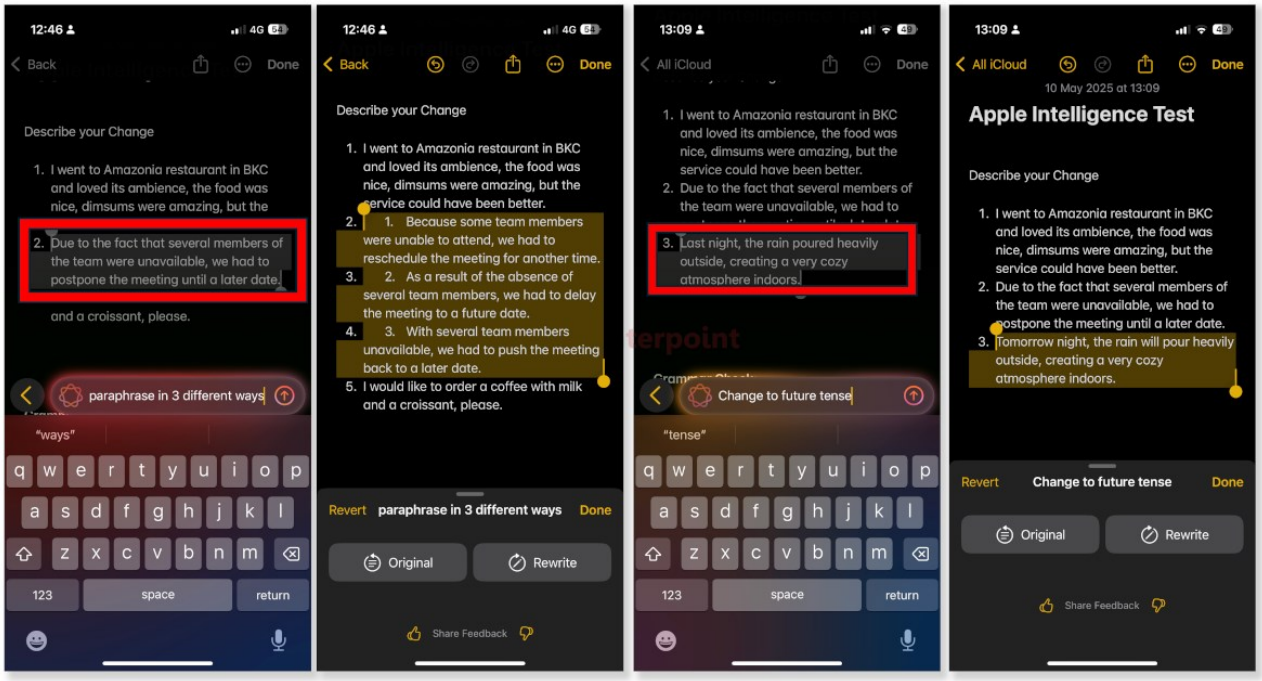
"Describe Your Change" is a versatile and effective tool for quick text tweaks like tense and tone, paraphrasing and even hashtag suggestions.

Beyond Spellcheck: Refine Grammar, Structure and Word Choice, all on-device

The next feature lets you proofread the text for spelling and grammatical errors, including tense, punctuation and typos. It can also rectify sentence structure and use different choices of words to make it sound better.

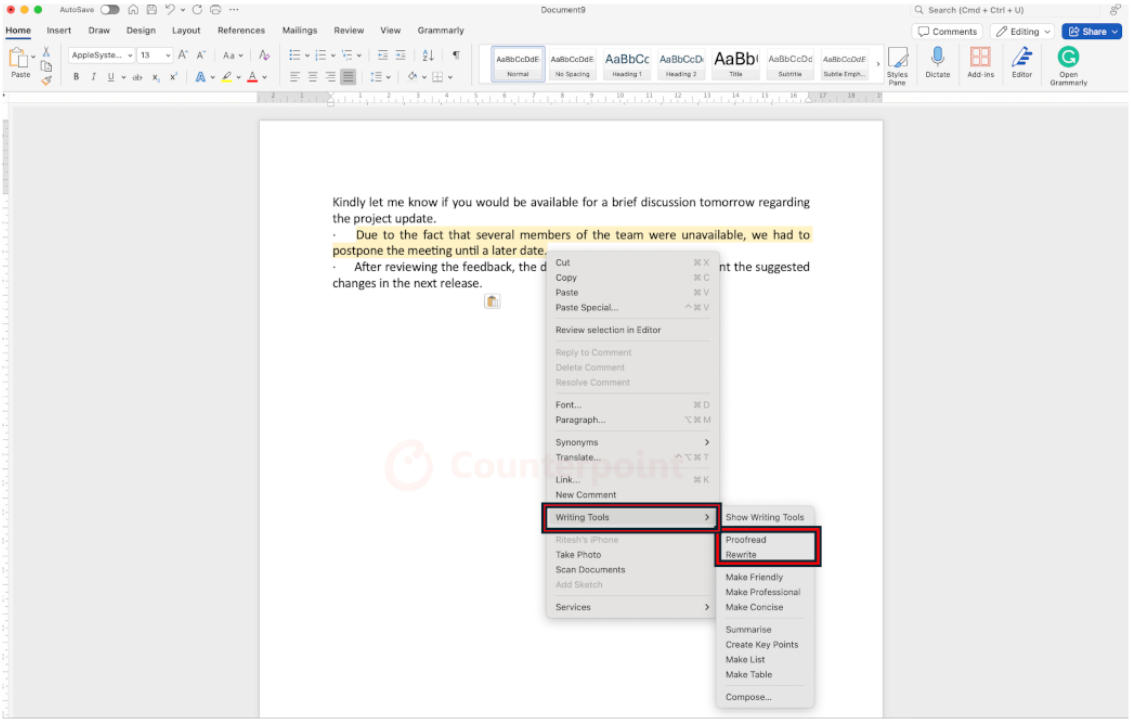


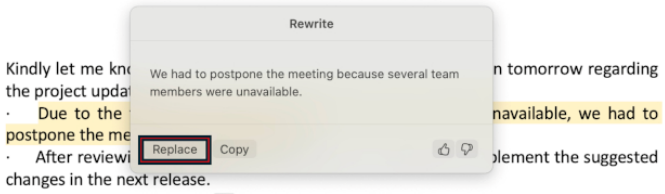
The rewrite option paraphrases the sentences differently, as seen in the examples below. Once the changes are done, you can accept them, which will replace the sentence, or you can individually review and accept suggestions.



Paraphrase Change Tense

On a Mac, we tested using some grammatically incorrect sentences on Microsoft Word, and Apple Intelligence Writing Tools could correct them accurately, though we wish there was a shortcut to invoke the writing tools. Currently, one needs to **Select the Text** > **Right Click > Writing Tools** to access these AI tools.

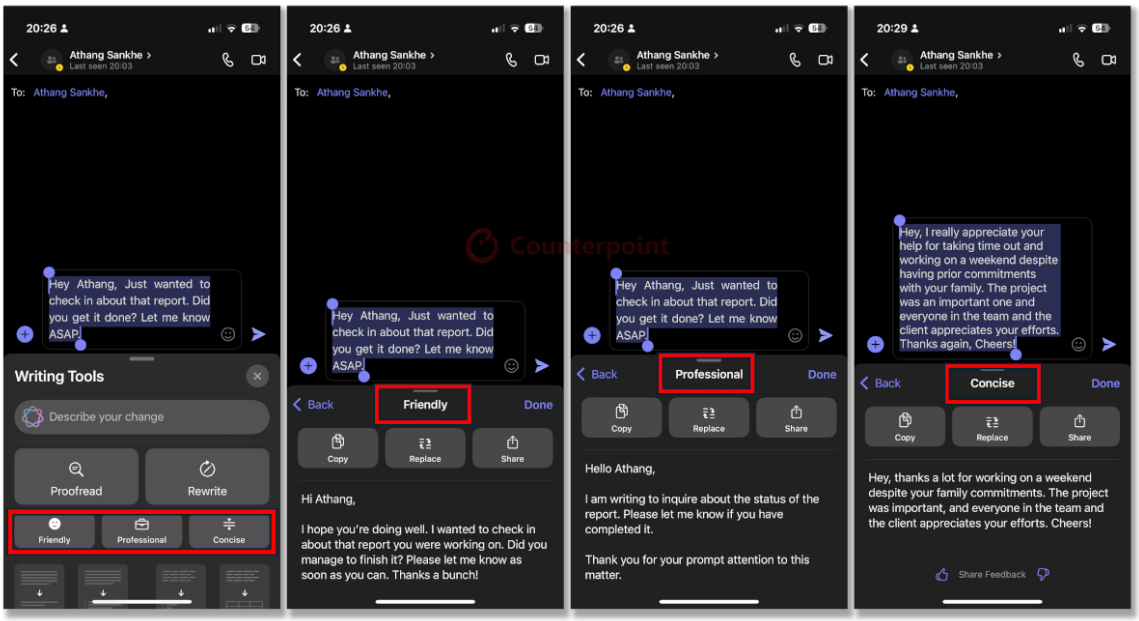




From polishing text to correcting sentence structure and word choice, it is a reliable and valuable feature, though a better-placed shortcut on Mac would enhance usability.

Adjust your tone, keep it concise, and communicate clearly with on-device processing

The next feature lets you change the tone to make it sound friendly or professional. If the text seems too lengthy, you can use the concise tool to make it short and crisp.

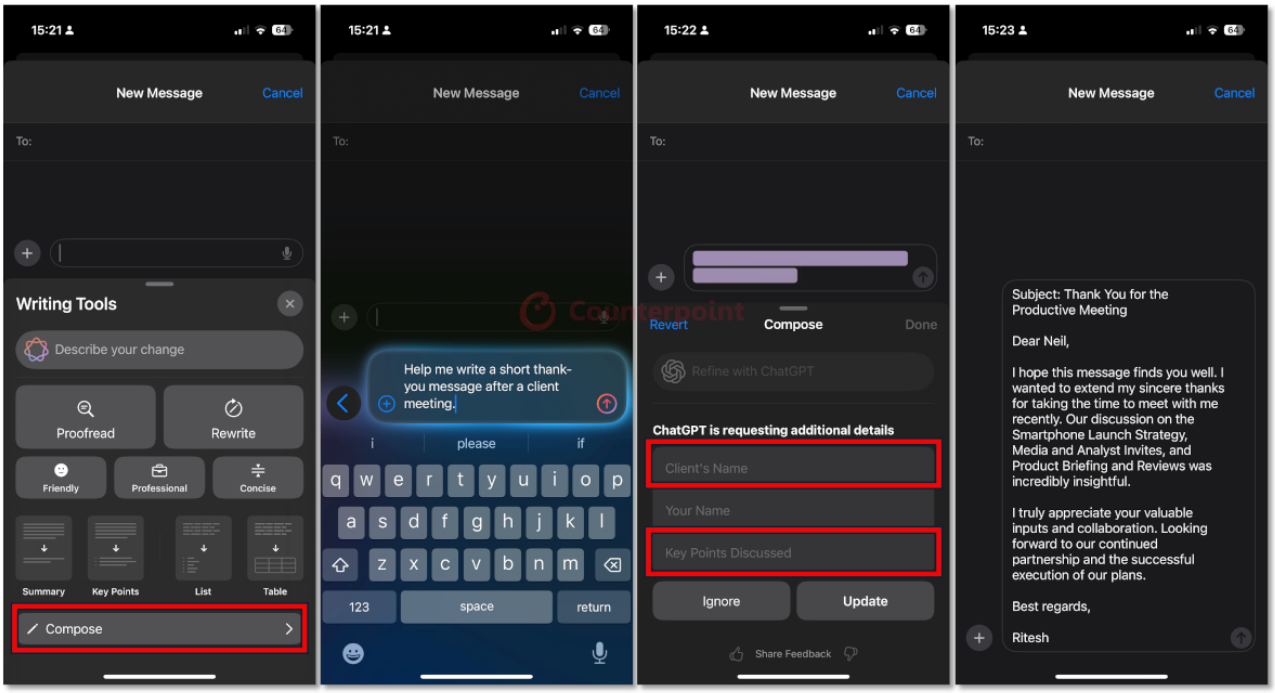


This Apple Intelligence feature provides a reliable way to modify the text to match the desired tone and shorten lengthy content, all offline.

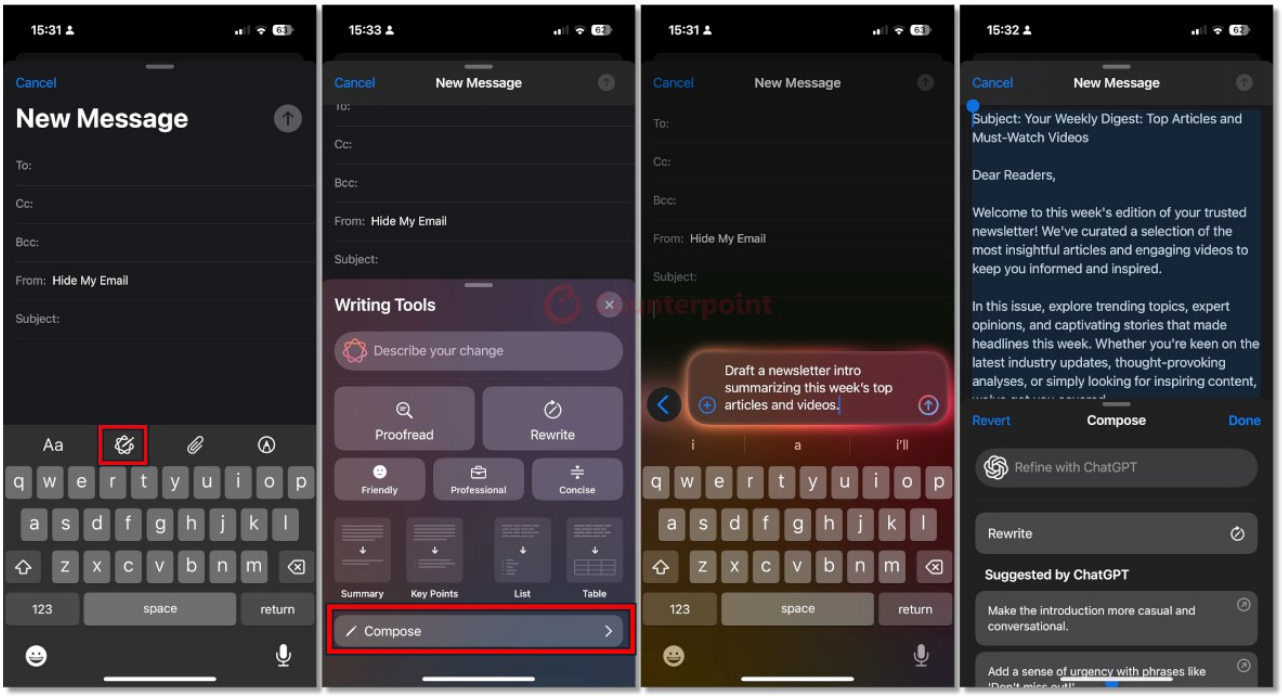
Have inspiration? Stuck on words? Go beyond a blank page using 'Compose with ChatGPT'

Do you often find yourself staring at the screen, struggling to articulate the perfect text or email? You have the core idea, but the words just don't seem to flow in the way you envision? It is a common frustration most of us have, and this is where Apple's 'Writing Tools' come in handy to help you compose texts and emails effortlessly.

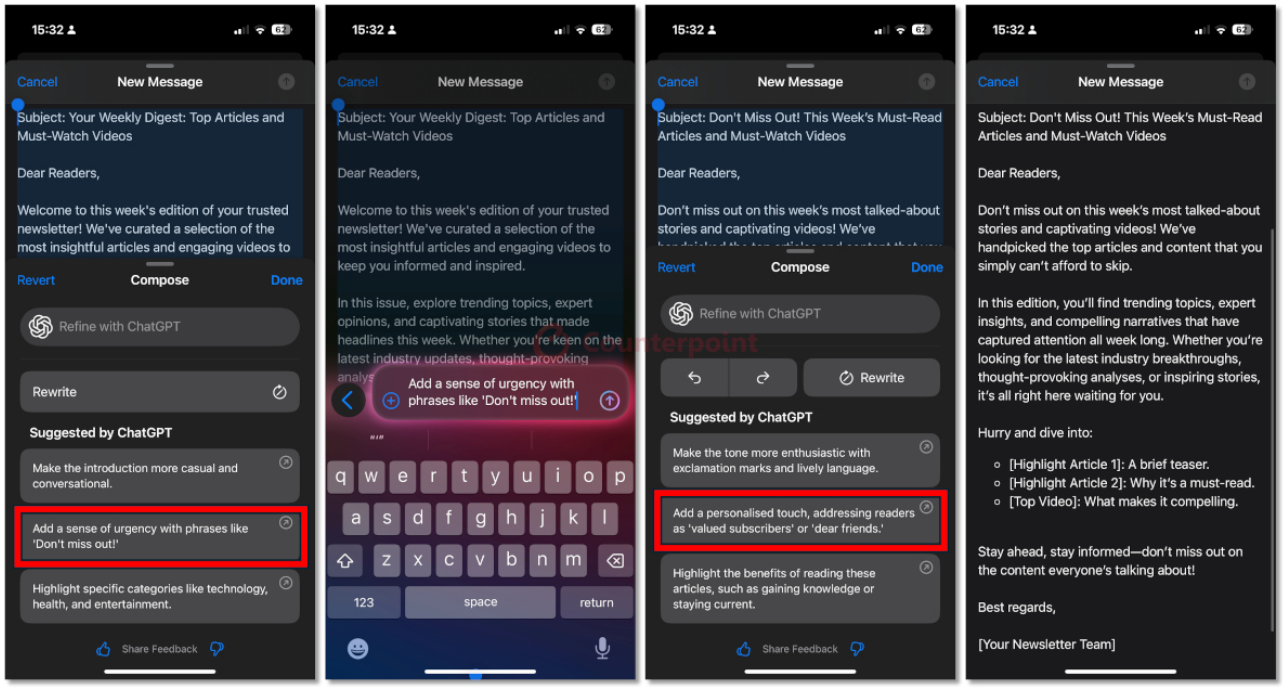
In the iMessage app, the AI tool can help you compose text messages. Just double tap on the blank space to invoke the Writing Tools options and select the last option "Compose". This feature needs internet connectivity and uses ChatGPT to compose text messages for you. For instance, we had a meeting with a client to discuss a product launch strategy, and to craft a text message, ChatGPT asked for meeting details like the client's name and key points discussed. You can even ignore these details if you are not comfortable sharing them. As you can see below, AI has crafted a nice message – a little lengthy for a text message and in email style, but still up to the mark.



You can even use the tool in the email app to compose emails. For instance, we gave a prompt to create an introduction summary for a newsletter with this week's top articles and videos, and it crafted a nice email, easing off most of the task.

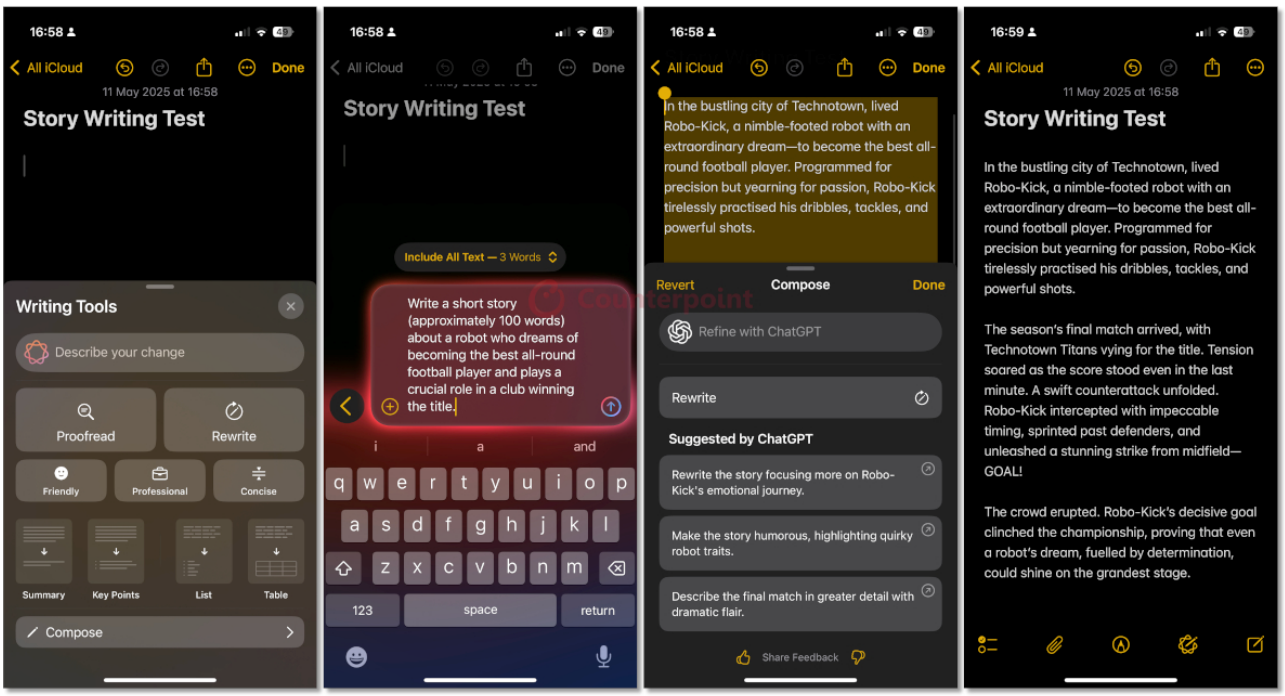


It even suggested some other alternatives, like adding “Don’t Miss Out” in the headline and more to convey a sense of urgency to ensure more clicks.



Clearly, these productivity tools greatly help in reducing your work, though one should not just copy and paste as it is, but make tweaks to fit the individual style.

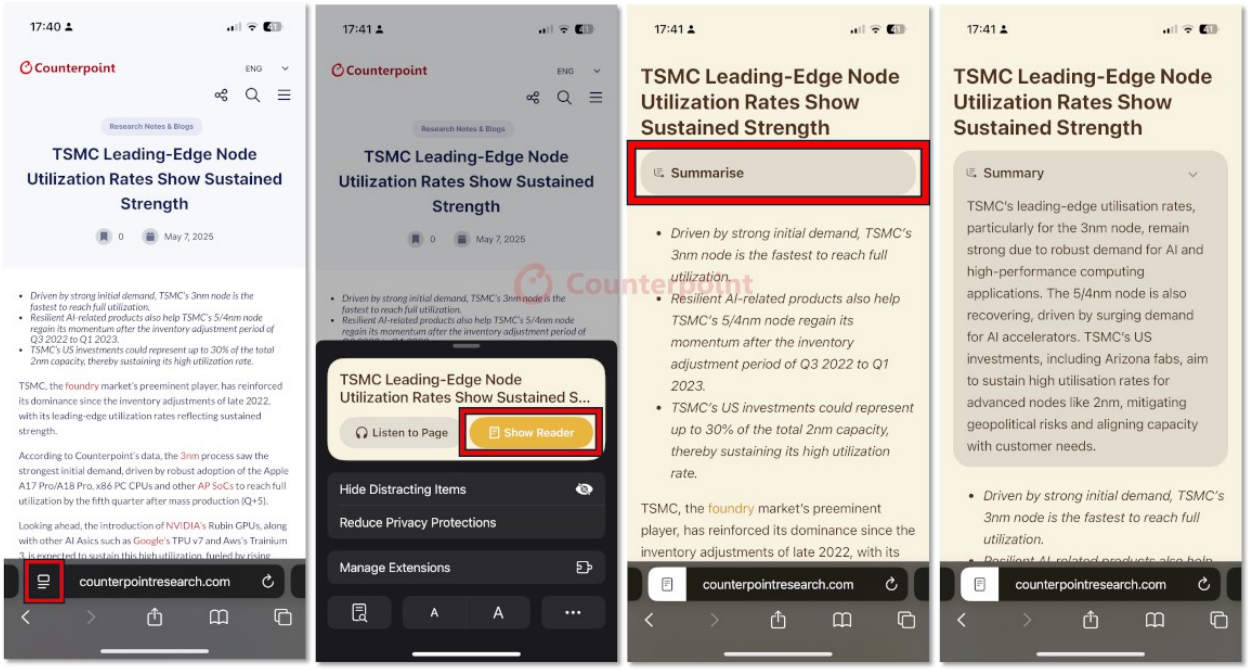
But there is more. You can even use the Compose with ChatGPT feature in apps like Notes, Pages, Word and Email to create fictional stories or so. In the Notes app, we invoked Writing Tools to write a story about a robot that aspired to be a footballer and who also played a crucial role in winning the league title for the team. ChatGPT wrote the story and also gave suggestions to highlight the robot’s emotional journey or quirky traits. The possibilities with Writing Tools and ChatGPT are endless.



Leveraging ChatGPT, the compose feature offers a powerful way to generate text from scratch across various apps, proving helpful for overcoming writer's block.

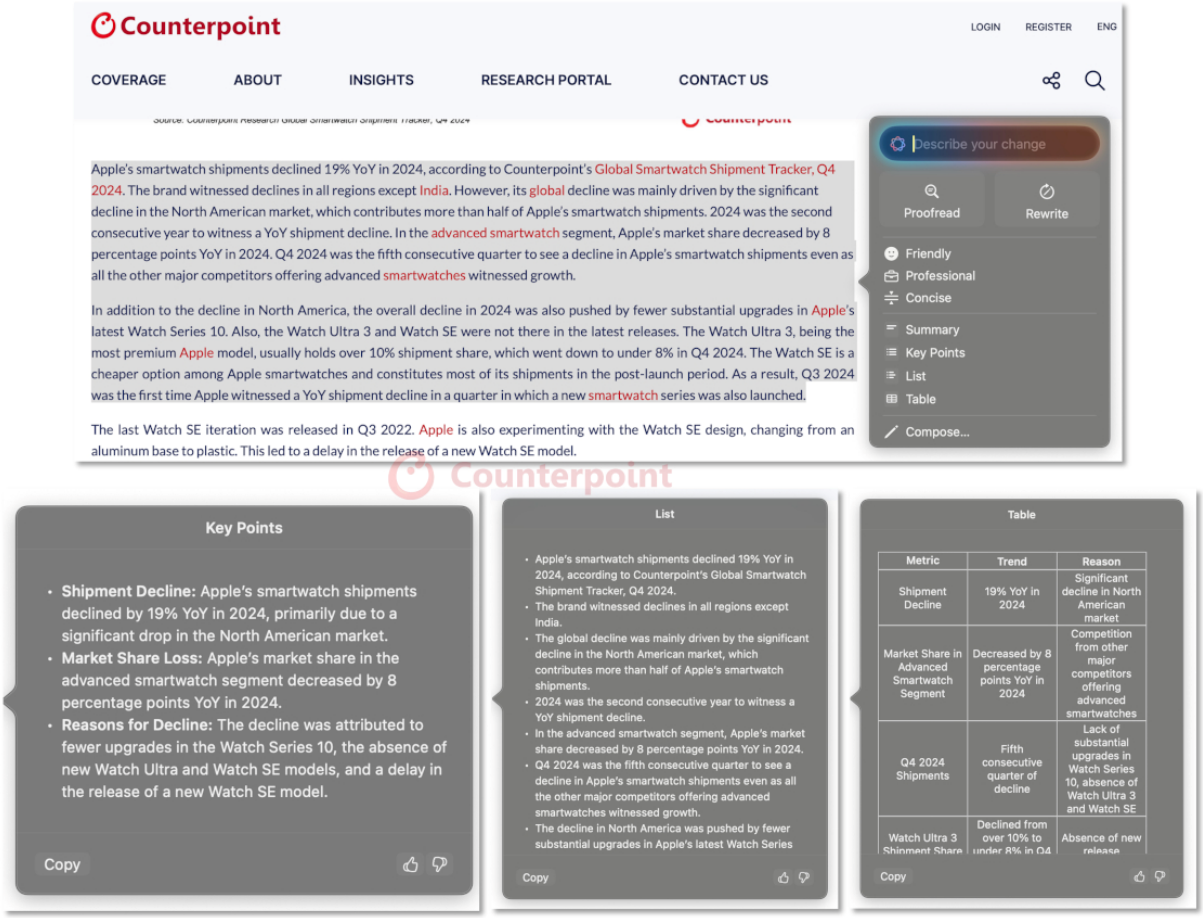
Summarization: From Long Reads to Key Points, Easy-to-Consume Byte-Sized Content

The summarization tool is a great addition to the AI features that quickly condenses lengthy web articles and email threads, so you spend less time scrolling and more time understanding the key information. Though summarizing web pages is a few-step process, we would have loved to have an easier way to go about it. Here is how it works – on the Safari browser, open the web page, tap on the reader icon on the bottom left of the URL bar, tap on Show Reader and then tap on Summarize.

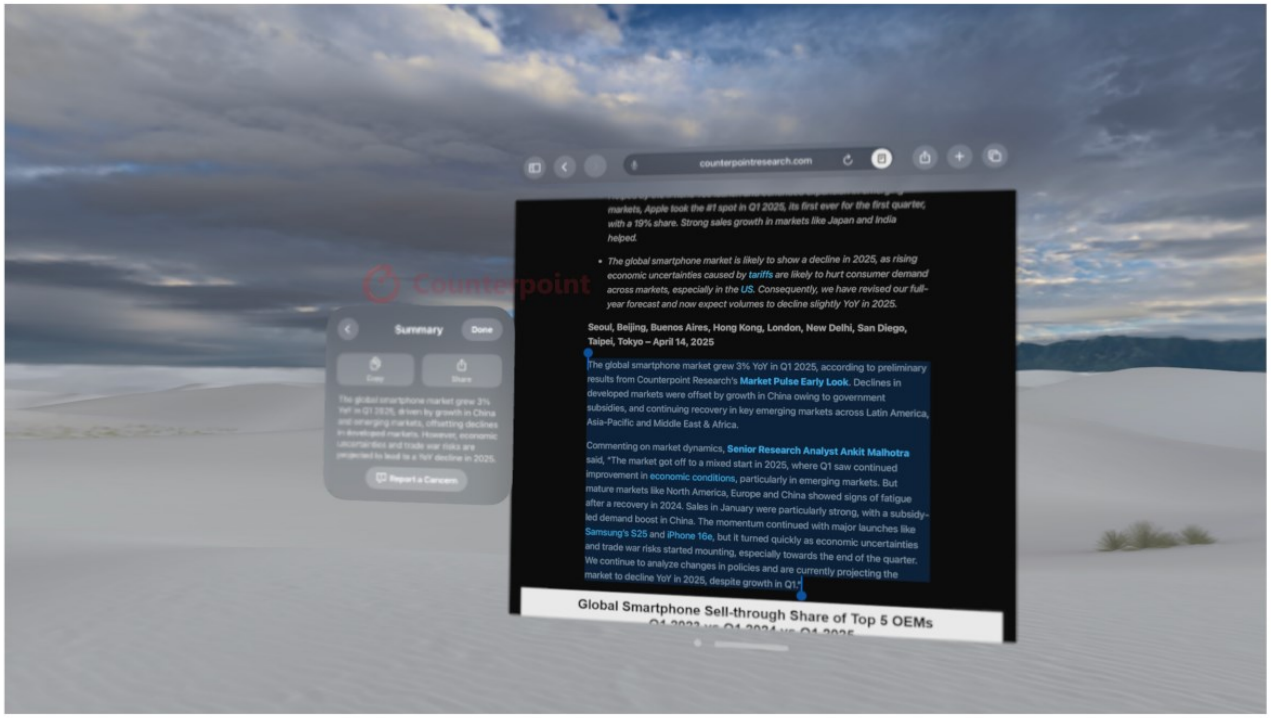


There is another way to do it, and this one works across any web browser or even in the Notes app or a Word document where you want to summarize text. Just select the text, tap on Writing Tools and then tap on Summary. It will generate a small summary of the selected text, which you can also copy and paste and share over email or text or save in Notes.

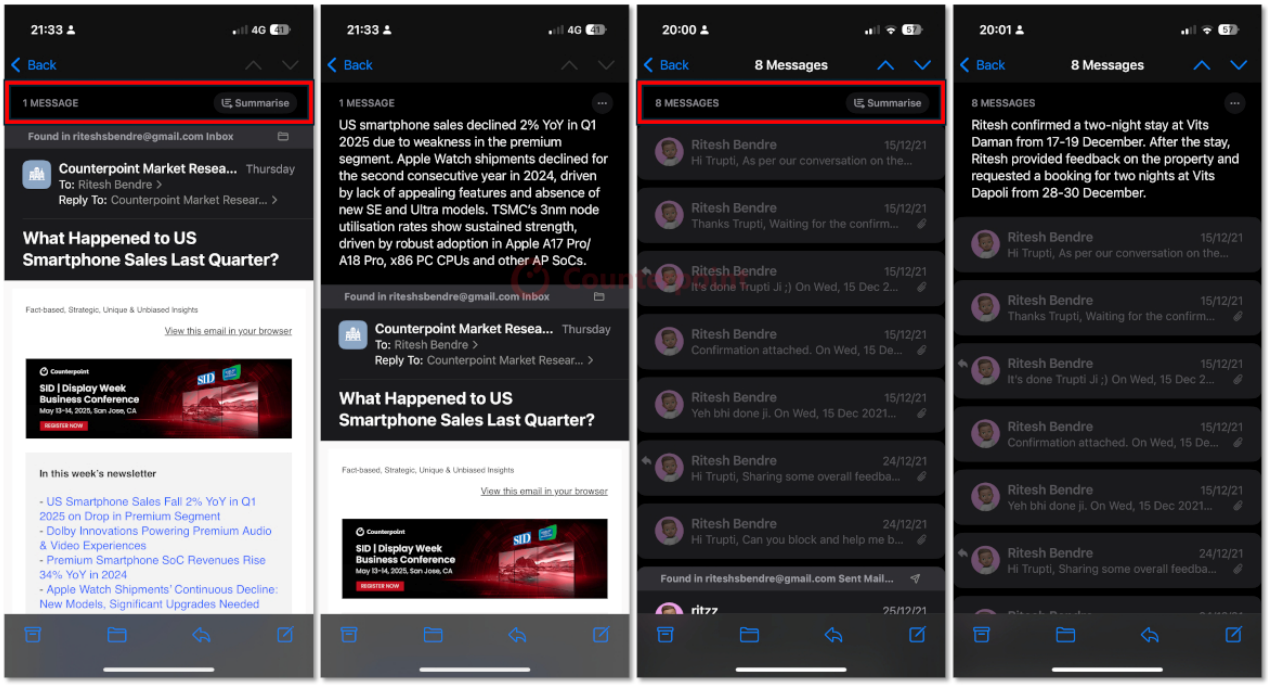
You can also have the summary listed in a few key bullet points or even convert it into a table for easy understanding, especially helpful when reading about market share numbers and trying to understand the growth drivers and more.



We even tried it on the Apple Vision Pro, and it worked well. Though selecting the text and invoking the Writing Tools is a bit cumbersome till you don't get used to the gestures, it is otherwise pretty neat and easy to use.



Tired of endless and lengthy email chains? Apple Intelligence on iOS can summarize email threads to provide a clear overview of the discussion, thus helping you stay on top by focusing on the essential information and saving valuable time in the process. However, this only works when connected to the internet, and on Apple's default email app for now. On top of every email or email thread, you will find a Summarize option. Just tap on it and you will get a summary within seconds.

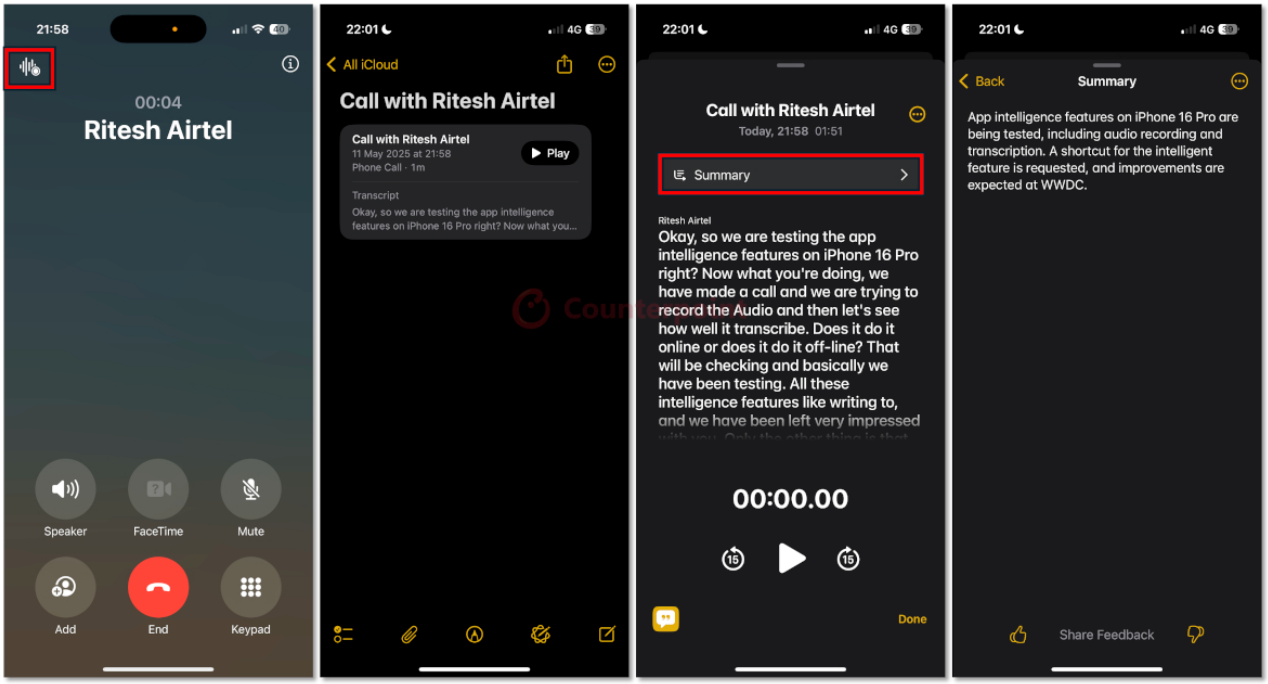


From long-form web articles and endless email threads, Apple's summarization tool effectively condenses information, though Safari implementation could be more streamlined.

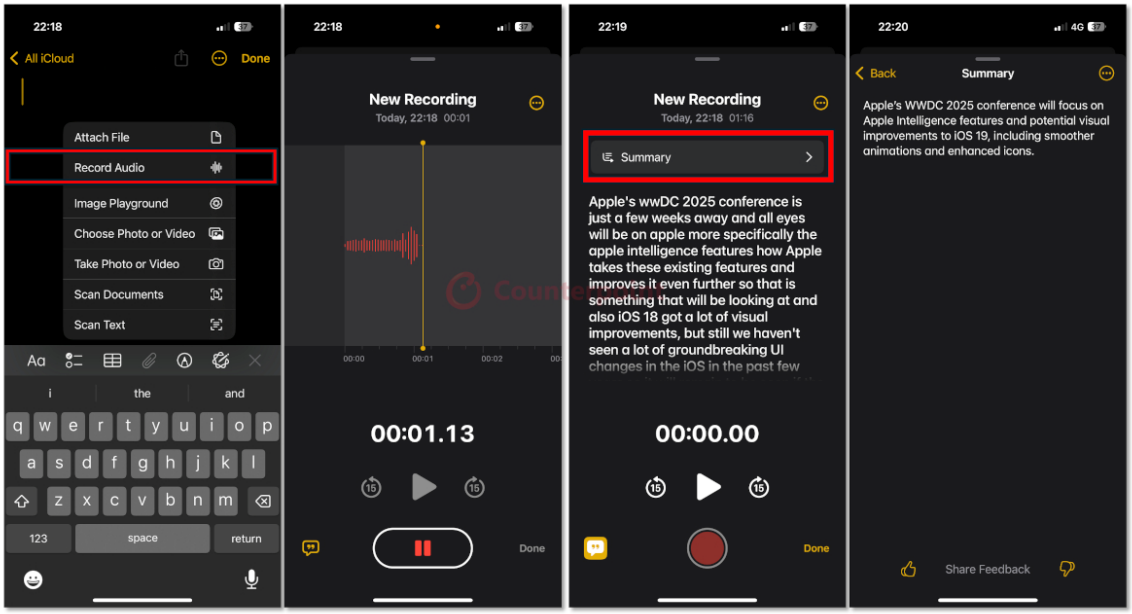
Call and voice recording, on-device transcription and summary for easy recall

One of the new features Apple rolled out with iOS 18 is the capability to intelligently handle voice. When on a phone call, you can now record the audio, which is stored in the Notes app. After the call, you can head over to the Notes app to listen to the audio, read the transcript and even generate a summary of the call. Supported languages include English, Spanish, Italian, Japanese, Korean and a handful of others.

Users can start the call recording by tapping on a record icon on the top left when on a phone call. As a privacy measure, the recipient will also be notified that the call is being recorded. While the **voice transcription works offline** without needing an internet connection, for the **summary**, an **internet connection is needed**.



The Notes app also allows you to record voice notes and Apple Intelligence can then transcribe them into text. This tool can come in handy during meetings or when you are interviewing someone, or just want to take voice notes.



We had no major issues with the transcription accuracy, but as you can see above, some terms like “WWDC” were transcribed as “wwDC”. Further, in one instance, “Apple Intelligence” was transcribed as “App Intelligence”. Therefore, it is not fully accurate, but does most of the job.

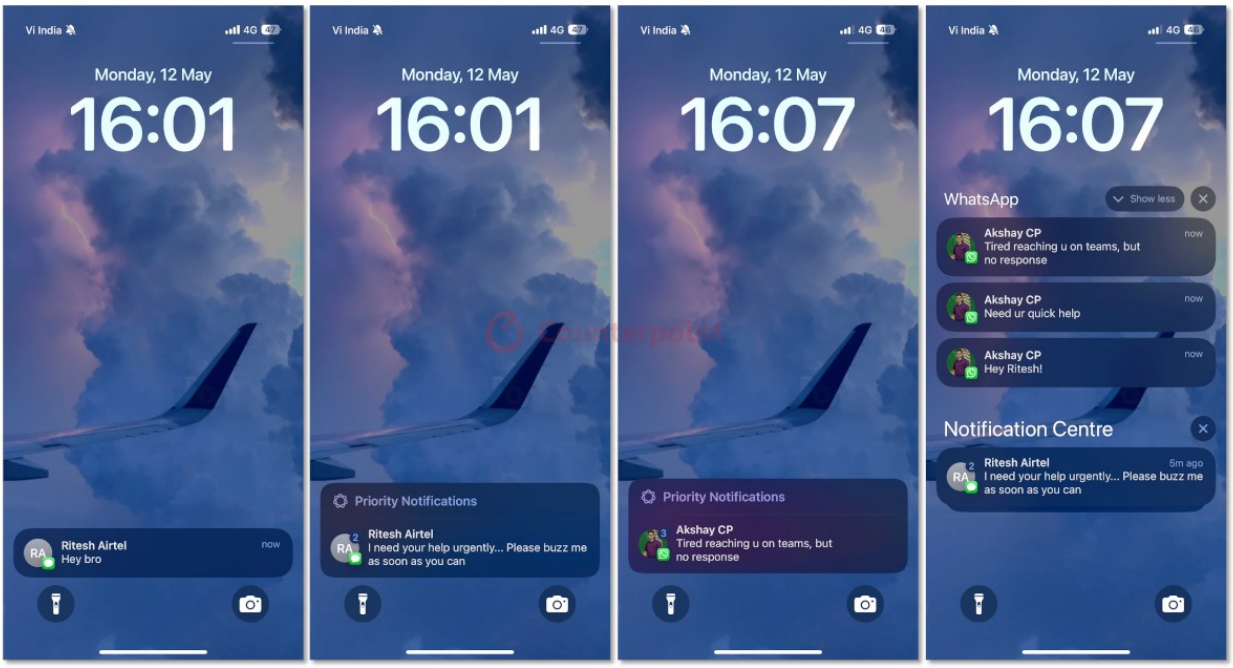
The ability to record calls, transcribe them and offer a summary adds convenience to Apple Intelligence AI suite tools, though transcription accuracy isn't always perfect.

Notification Management: Cut Through Notification Overload with Short Summary and Priority Alerts

Landing after a long-haul flight or waking up to a flood of overnight notifications can feel overwhelming. To help manage and streamline these notifications, Apple Intelligence has two smart features – Notification Summary and Priority Notifications. AI can group the least urgent notifications into a concise summary, thus allowing you to catch up on what matters most.

But in our experience, these notification summaries were not quite helpful, especially when you have 15 emails, 20 WhatsApp or text messages and more. As there are so many conversations, the **summary is not helpful**. But if you just have a limited emails or texts to catch up, then the AI does a decent job.

With Priority Notifications, the AI identifies and highlights the most important, time-sensitive information from the apps, so you don’t miss out on urgent notifications. For example, someone just sending you a WhatsApp or text message to say “Hi” or “Hello” will go in the notification tab. But when some **sense of urgency** is detected, AI ranks that conversation higher and displays the same as **Priority Notifications**, as seen below.



Apple has done a good job with 'Priority Notifications' to highlight important alerts, but the summary needs to be contextual and smarter.

Final Thoughts

Although Apple has been late in introducing GenAI features, it has thoughtfully integrated them system-wide and across devices for a more consistent experience.

The concept of Notification Summary is promising, but its effectiveness seems to diminish when there are too many notifications. Perhaps, future iterations could explore a more granular categorization to intelligently group them into categories like "Transactions", "Promotions" and "News", making the summary far more digestible and actionable.

Throughout our usage, we liked how Apple Intelligence features work and how they are thoughtfully designed and implemented. However, there can be further improvements for easy access and operation in the next iterations.

Apple Intelligence handles the processing of 6 out of 10 Writing Tools use cases on-device to maintain privacy. However, for certain complex tasks, it leverages a private cloud to deliver the results. But how will it work with third-party developers to maintain Apple's privacy and data security commitment will be important to watch.

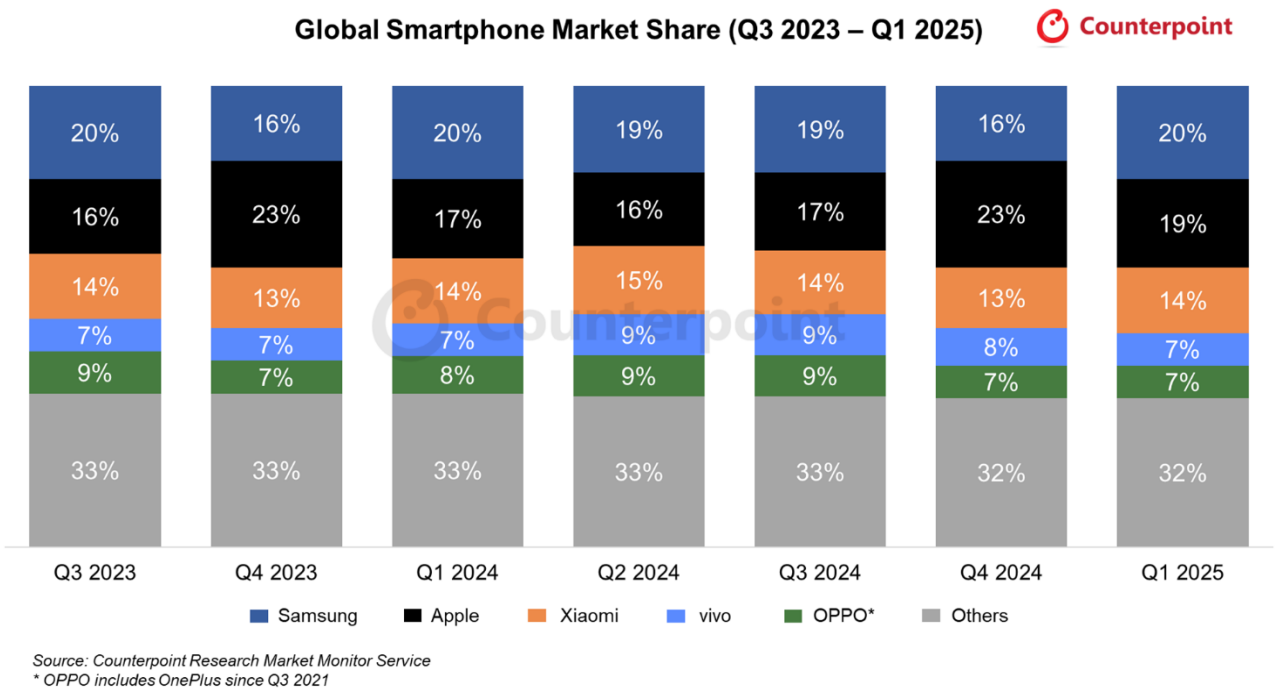
Apple Intelligence boasts impressive system-wide integration with Apple's apps and select third-party offerings. However, the real test, and a significant opportunity, lies in how Apple collaborates with key developers such as Meta, given their existing LLM capabilities, to fully unlock its potential.

As Apple largely emphasizes on-device AI and private cloud compute for data safety and security, how seamlessly it transfers the learnings and personalized experiences when moving across devices or upgrading will be a key area to watch.

With WWDC 2025 weeks away, all eyes will be on iOS 19 and how Apple improves the AI features further.

Also, as Apple Intelligence features evolve, the monetization strategy will be a key driver for Apple's services revenue growth.

Global Smartphone Market Share: Quarterly



Source: Counterpoint Research Market Monitor Service
** OPPO includes OnePlus since Q3 2021*

MARKET HIGHLIGHTS

- Global smartphone shipments grew by 2% YoY in Q1 2025, driven largely by emerging markets.
- Accounting for over half of global shipments, Asia-Pacific remained the top contributor in terms of regions. Japan emerged as a standout market with 29% YoY growth, fueled by strong demand for Apple and Samsung devices.
- North America recorded the highest regional growth in Q1 2025 at 8% YoY, supported by increased OEM shipments aimed at mitigating tariff impacts.
- Samsung led the market with a 20% share, closely followed by Apple at 19%. The Galaxy S25 series and iPhone 16e launches provided momentum for the two brands.
- Apple's shipments in Q1 2025 grew 12% YoY, the highest among the top five brands, fueled by strong performance in North America, Japan and India, along with the launch of the iPhone 16e.
- Xiaomi maintained its momentum and secured third place with a 2% YoY growth, driven by a strong rebound in its home market, China, supported by retail expansion and a refreshed product portfolio.
- vivo and OPPO took the fourth and fifth spots, respectively, with a narrow margin separating them. Both benefited from solid mid-tier segment performance and government subsidies in China.
- Looking ahead, the global smartphone market may face a slight decline in 2025 due to weakening consumer sentiment and macroeconomic uncertainty tied to tariffs and supply chain challenges.

Global Smartphone Shipments Market Share (%)

Global Smartphone Shipments Market Share (%)							
Brands	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Samsung	20%	16%	20%	19%	19%	16%	20%

Global Smartphone Shipments Market Share (%)							
Apple	16%	23%	17%	16%	17%	23%	19%
Xiaomi	14%	13%	14%	15%	14%	13%	14%
vivo	7%	7%	7%	9%	9%	8%	7%
OPPO*	9%	7%	8%	9%	9%	7%	7%
Others	33%	33%	33%	33%	33%	32%	32%

**OPPO includes OnePlus since Q3 2021*
***Ranking is according to the latest quarter.*
**Data on this page is updated every quarter*

This data represents the global smartphone market share by quarter (from 2023-2025) by top OEMs. Global smartphone shipments by market share and millions of units are provided.
For detailed insights on the data, please reach out to us at sales(at)counterpointresearch.com. If you are a member of the press, please contact us at press(at)counterpointresearch.com for any media enquiries.

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Japan’s MIC Rules Are Reinforcing Apple’s Dominance in the Premium Market

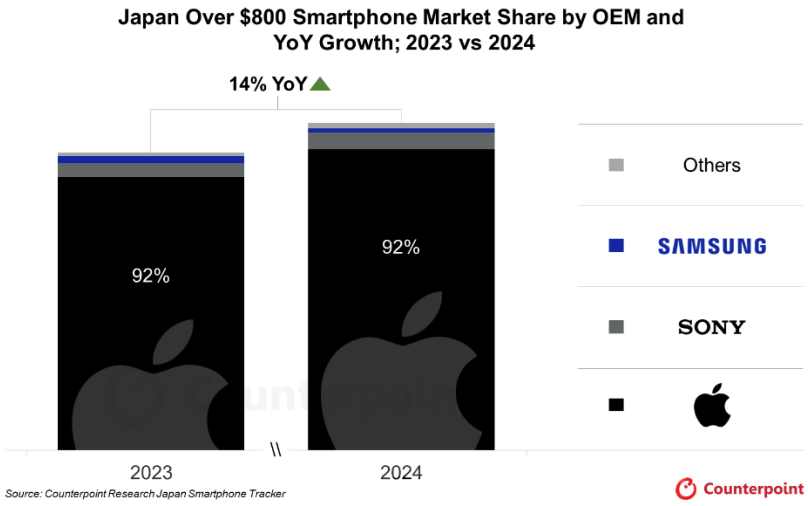
- *Facing market distortion from extreme discounting, Japan introduced stricter subsidy rules in late 2023 to stabilize smartphone pricing.*
- *Japan’s revised subsidy rules aimed to curb excessive carrier discounts, but have further reinforced Apple’s dominance in the premium segment.*
- *The “Net 1-yen” model and RMJ-based pricing system favor iPhones with strong resale value, making it harder for other brands to compete in the Premium segments.*
- *Both the low-end and high-end segments are gradually expanding, as low-end models benefit from fewer restrictions and Apple continues to dominate the premium segments.*

Japan’s efforts to regulate excessive smartphone discounts were meant to create a fairer market, but they’ve ended up making conditions even more favorable for Apple.

In late 2023, Japan’s Ministry of Internal Affairs and Communications (MIC) enforced stricter discount rules to eliminate extreme offers such as “1-yen phones.” Yet the new environment has amplified Apple’s competitive advantages. iPhones’ strong resale performance makes them ideal for “effective 1-yen” promotions, where users return the device after a fixed period and pay very little overall.
Beginning in 2025, the resale price benchmark was revised to rely on Reuse Mobile Japan (RMJ) data. Under this system, Android and Chinese OEM devices are now being assessed at lower values than before, reducing their trade-in benefits and raising end-user costs. Instead of competing head-to-head with iPhones in the premium segment, Android and Chinese brands are increasingly shifting their focus to lower-end models that fall outside the scope of government subsidy rules. This shift has reduced choices in the mid-range segment.

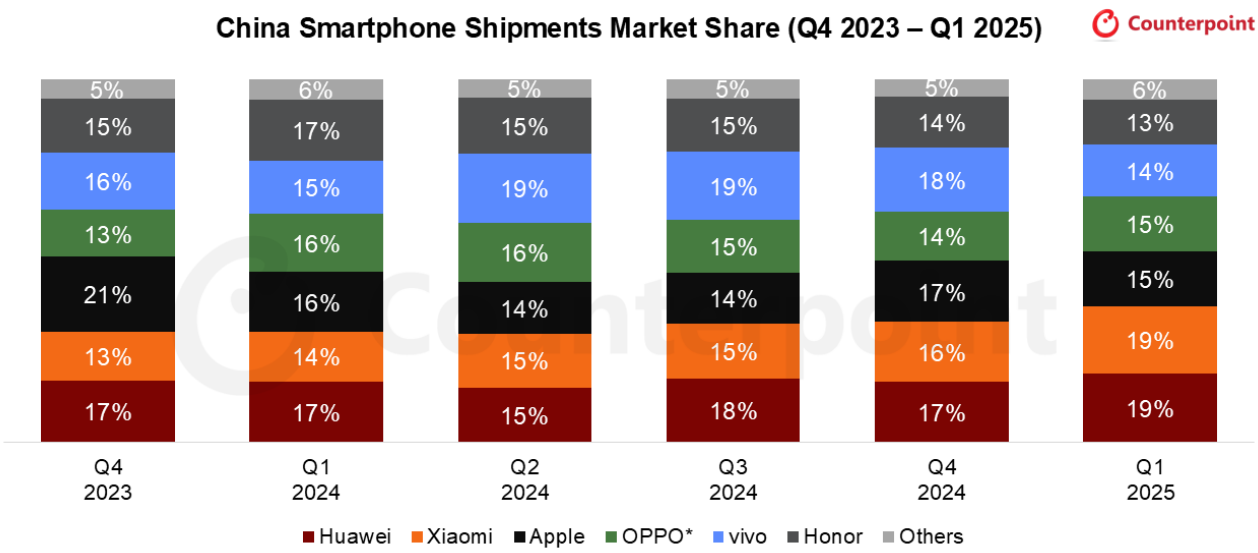
Japan’s premium smartphone market ($800+) grew by 14% YoY from 2023 to 2024, yet Apple still commands an overwhelming 92% share, fueled by its advantageous trade-in values and marketing structure.

While excessive discounting has been curbed, the new regulations have also unintentionally narrowed consumer choice. A more balanced policy approach may be needed to preserve competition across price tiers.



Access to the full report *here*
If you are not a client, reach out to us at *info@counterpointresearch.com*

China Smartphone Market Share: Quarterly



Source: Counterpoint Research Market Monitor Service

**OPPO includes OnePlus since Q3 2021.*

Market Highlights

- China's smartphone shipments grew 5% YoY in Q1 2025, thanks to the government's national subsidy program that boosted holiday-season sales. However, demand weakened post-holiday, resulting in overall quarterly performance falling below expectations.
- Huawei and Xiaomi benefited the most from the subsidy program, with their shipments growing 18% and 40% YoY, respectively.
- Apple's shipments dipped 3% YoY, as most of its phones are priced above the subsidy threshold, including its best-selling Pro models. The subsidy program, launched in January, applies only to smartphones priced below CNY 6,000 (about $820).
- Promotions and subsidies only frontload demand rather than creating a new one. Looking ahead, we still believe the market will post YoY growth for 2025, but at a smaller rate. OEMs will launch new models in Q2, and the mid-year sales festival will still have the potential to lift shipments.

China Smartphone Shipments Market Share (%)

Brands	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Huawei	17%	17%	15%	18%	17%	19%
Xiaomi	13%	14%	15%	15%	16%	19%
Apple	21%	16%	14%	14%	17%	15%
OPPO*	13%	16%	16%	15%	14%	15%

Brands	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
vivo	16%	15%	19%	19%	18%	14%
HONOR	15%	17%	15%	15%	14%	13%
Others	5%	6%	5%	5%	5%	6%

HONOR separated from Huawei in Q4 2020 and its market share does not include Huawei brand family volumes starting Q1 2021.
** OPPO includes OnePlus since Q3 2021.*
***Ranking is according to the latest quarter.*

**Data on this page is updated every quarter. This data represents the Chinese smartphone market share by quarter (from 2023-2025) by top OEMs.*
For detailed insights on the data, please reach out to us at sales(at)counterpointresearch.com. If you are a member of the press, please contact us at press(at)counterpointresearch.com for any media enquiries.

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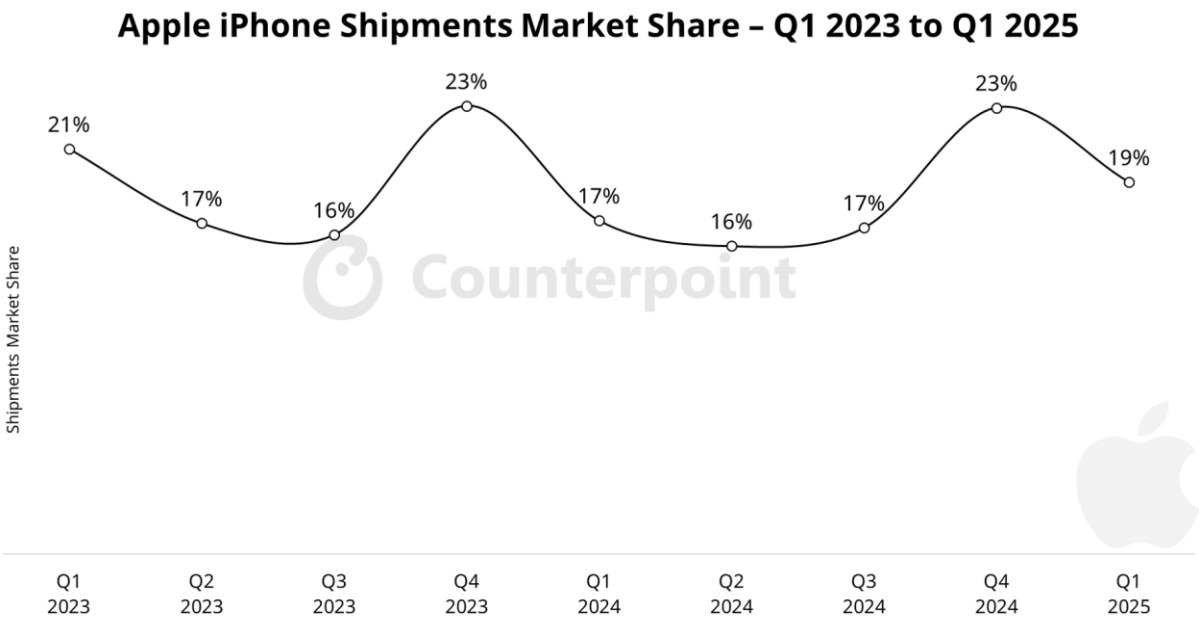
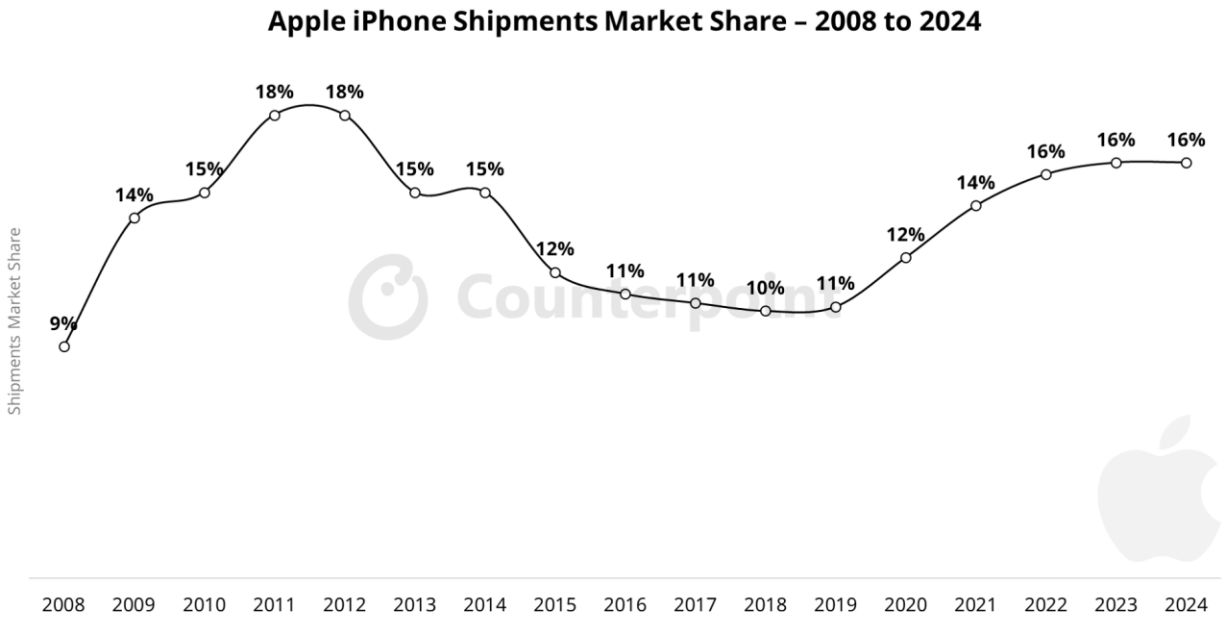
Apple iPhone Market Share



Apple iPhone Shipments Market Share (%)									
Quarter	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
iPhone shipments market share within Global Smartphone Market	21%	17%	16%	23%	17%	16%	17%	23%	19%

Market Highlights

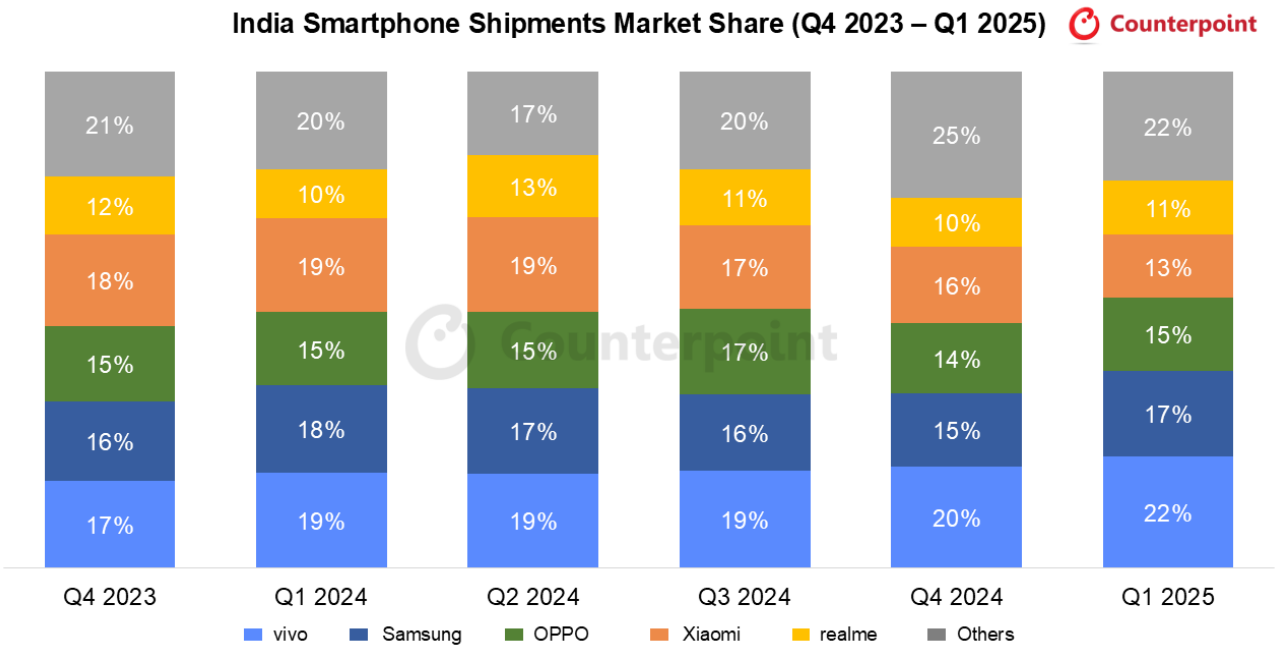
- Apple’s smartphone shipments grew 12% YoY in Q1 2025, the highest among the top five brands, fuelled by strong performance in North America, Japan and India, along with the launch of the iPhone 16e.
- India’s premiumization trend continues, with Apple’s shipments in the country growing 29% YoY in Q1 2025. Deeper reach into Tier-2/3 cities and local investments in manufacturing and R&D are driving its strong momentum.
- Apple saw a 21% YoY shipment growth in North America, supported by the iPhone 16e launch that boosted mid-range traction and squeezed competitors. The market’s shift toward high-end devices and existing inventory buffers helped Apple maintain momentum despite tariff concerns.



Apple iPhone Shipments Market Share: Annual

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Market Share	9%	14%	15%	18%	18%	15%	15%	12%	11%	11%	10%	11%	12%	14%	16%	16%	16%

India Smartphone Market Share: Quarterly



Source: Counterpoint Research Market Monitor Service, Xiaomi includes POCO; OPPO includes OnePlus; vivo includes iQOO; Figures not exact due to rounding

*Ranking is according to the latest quarter.

Market Highlights

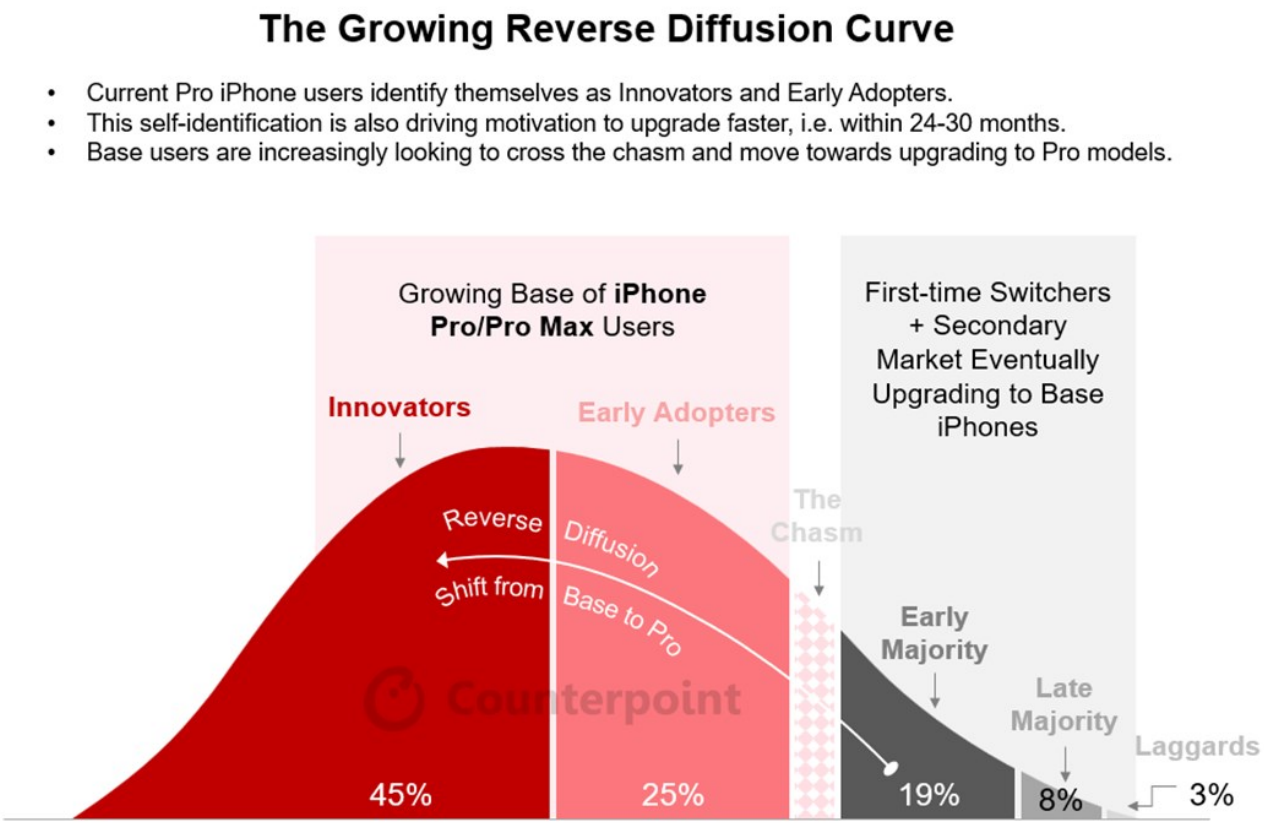
- In terms of volume, vivo led India's smartphone market for the third successive quarter with a 22% share.
- Samsung climbed to the second spot this quarter, supported by multiple launches across price segments. The S series performed well, reaching its highest-ever share in Samsung's premium portfolio, driven by the S25 Ultra series.
- OPPO secured the third position, supported by the strong performance of its A3 and K series, which were effectively marketed around durability, an increasingly important consumer consideration.
- Xiaomi, on the other hand, saw a decline in shipments during the quarter, primarily due to higher inventory levels. realme posted a modest 3% YoY growth, securing a position in the top five, driven by portfolio expansion through the new P series and the 14 Pro series.

India Smartphone Shipments Market Share (%)

Brands	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
vivo	17%	19%	19%	19%	20%	22%
Samsung	16%	18%	17%	16%	15%	17%
OPPO	15%	15%	15%	17%	14%	15%
Xiaomi	18%	19%	19%	17%	16%	13%

Brands	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
realme	12%	10%	13%	11%	10%	11%
Others	21%	20%	17%	20%	25%	22%

iPhone Pro Users Replacing Phones Faster Than Non-Pro Users



Source: Counterpoint Research

In our Primary Research practice, we have conducted a comprehensive smartphone survey, gaining critical insights about Apple users across four key Apple markets – US, China, UK and India – with a strong sample size of 4,000.

Key Analyst Takeaways:

- Replacement rates across iPhone users: One of the main findings is that Pro iPhone users are likely to replace their iPhones much faster than base iPhone users. Pro users hold on to their phones for an average of 2.75 years, while non-Pro users use the device for an average of 3.15 years.

- Premiumization driving Pro users: Premiumization is one of the biggest contributors to iPhones' increasing revenue share YoY. This trend is likely to continue for the next 2-3 years, pushed by emerging markets like India and Southeast Asia.

- Reverse diffusion: Of all the Pro model owners, 45% claim to be innovators. They tend to buy Apple's newest tech around the launch date and must have the newest Pro iPhone at the earliest. An additional 25% claim to be early adopters who are opinion leaders. This explains why Pro model users are increasingly looking to upgrade more frequently.

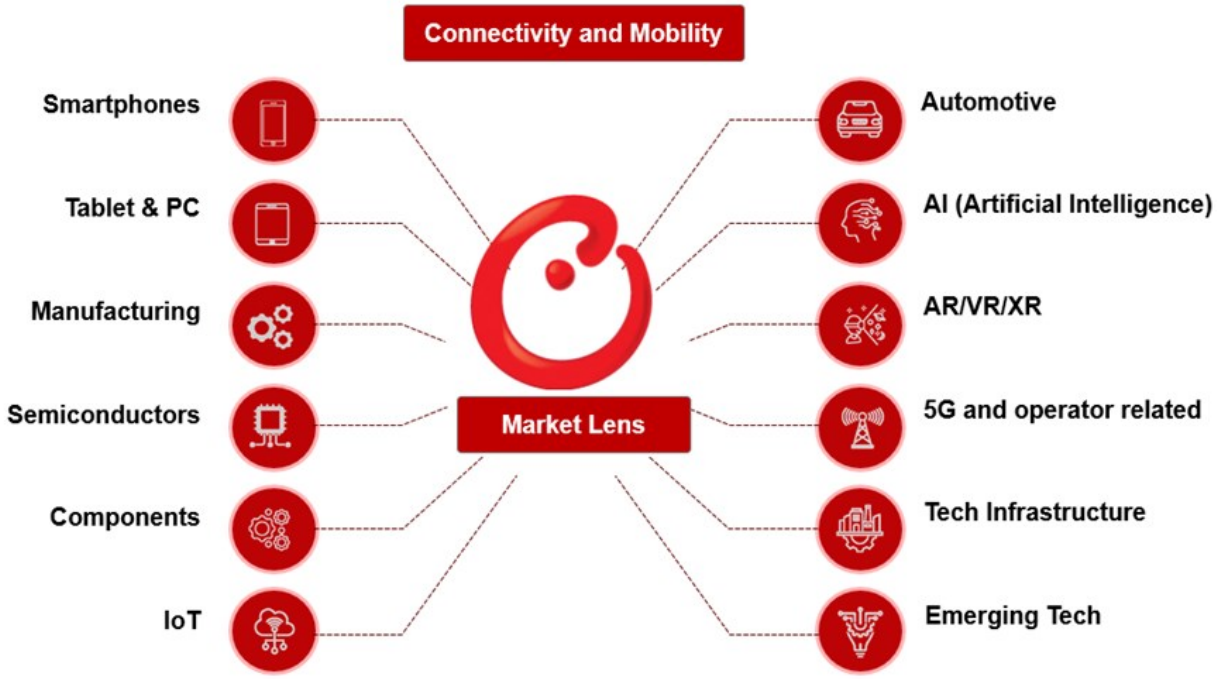
- Maturing iPhone users: As iPhone users get mature after repeatedly buying iPhone models, they are highly likely to upgrade to a Pro version at one point, looking to be high on the Apple experience curve by getting to use the latest and greatest features faster than before.

• Impact on secondary smartphone market: With a bigger Pro model volume being sold across main markets, the Pro series supply in the secondary markets over the next 2-3 years is bound to increase, providing a respite from the supply problems being faced by the refurbishment sector globally.

• Growing switches to iPhone: Apple continues to witness Android users switching to iOS. 48% of the iPhone owners participating in the survey previously owned an Android phone.

This report is part of Counterpoint Research Market Lens Service, which covers our primary research expertize throughout the technology ecosystem from chips to devices to services both quantitatively and qualitatively.

Counterpoint Research Market Lens encapsulates



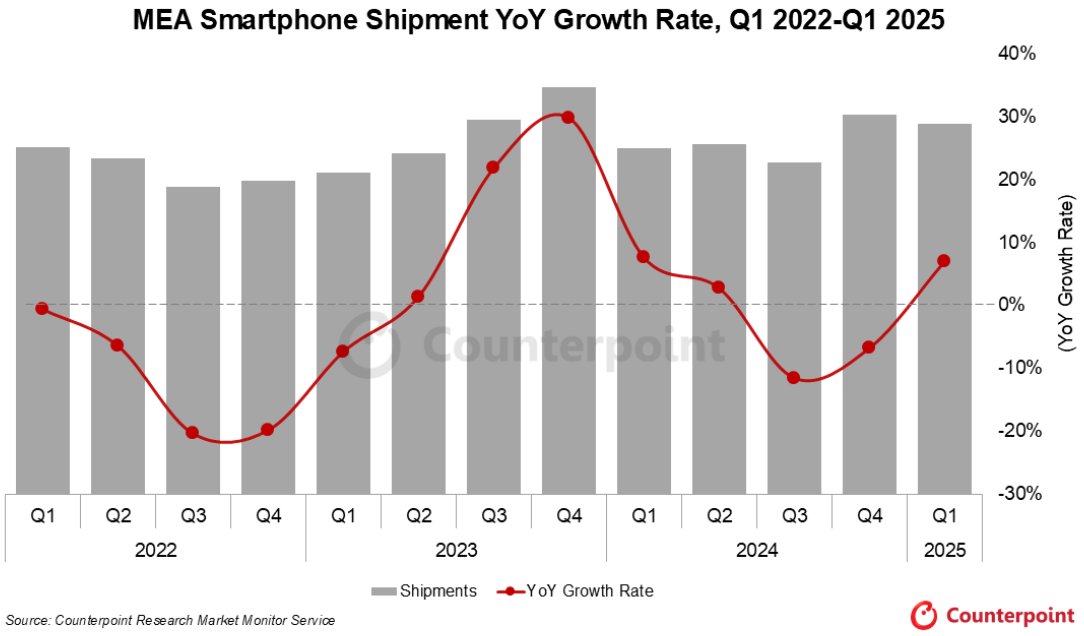
Source: Counterpoint Research

MEA Smartphone Shipments Rise 7% in Q1 2025 Driven by Festive Sales

- *The MEA smartphone market grew 7% YoY in Q1 2025, due to strong festive demand, easing inflation, and widening device availability from new Android players.*
- *Lower end grew the most as competition intensified in the largest market segment in the region. Volume growth was further aided by continuously improving economic and market fundamentals.*
- *5G and OLED adoption reached 33% and 42%, respectively, boosted by network rollouts across the region and popular big-screen, feature-rich phones from Android OEMs.*
- *Transsion remained the market leader with a 32% share. TECNO grew rapidly in the mid-range segment, while Infinix and itel had mixed results in budget categories.*

London, Beijing, Boston, Buenos Aires, Hong Kong, London, New Delhi, Seoul, Taipei, Tokyo – May 26, 2025

MEA smartphone shipments rose 7% YoY in Q1 2025, the region's first positive rise in YoY growth rate following a two-quarter contraction, according to the latest research from Counterpoint's **Market Monitor** Service. Strong festive demand during Ramadan and Easter, widening device availability, along with mild inflation boosted consumer spending during the quarter.

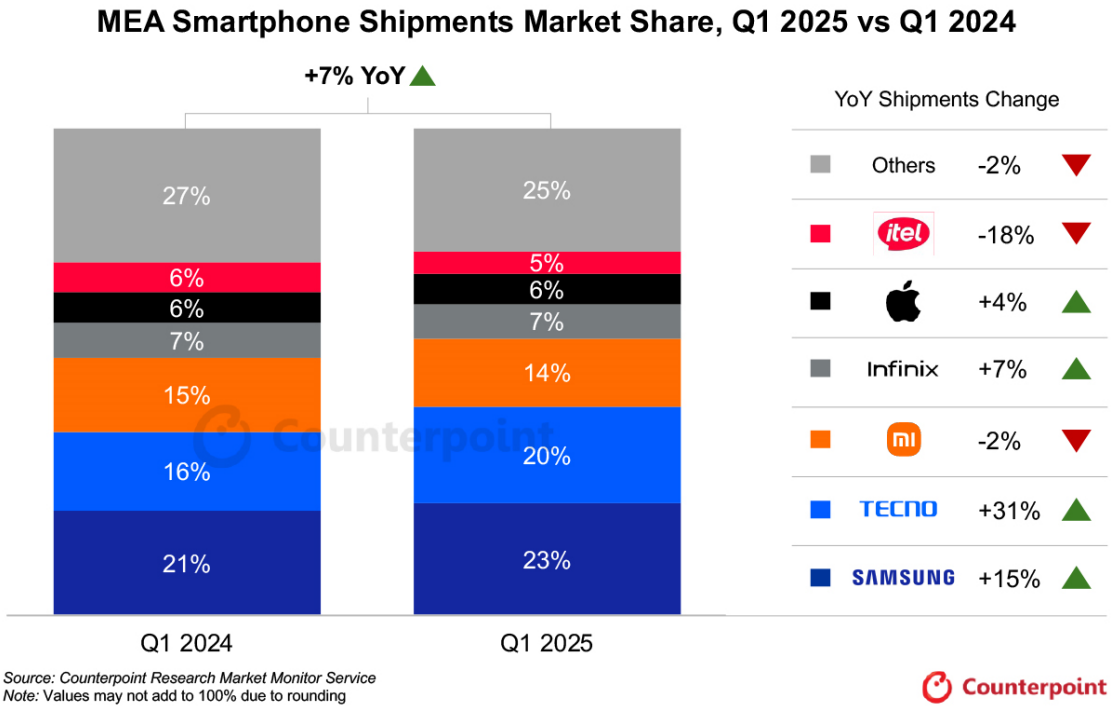


Source: Counterpoint Research Market Monitor Service

Commenting on the market dynamics, **Senior Analyst Yang Wang** said, "In 2024, the MEA smartphone market entered a correction phase as brands focused on clearing old inventory with fewer new launches and smaller discounts, leading to a drop in the number of active brands. However, the market saw strong recovery early 2025 driven by better supply and pent-up demand, especially for budget phones under $100. The recovery was supported by the continuously improving economic situation and market fundamentals. On the other hand, premium smartphones priced over $800 also logged healthy growth even in a traditionally low volume quarter, highlighting the staying power of the premiumization trend."

5G adoption in the MEA region continued to edge higher, reaching 33% market share during the quarter, with the strongest growth seen among $400-$499 smartphones from brands like Samsung, Xiaomi, and HONOR. Lower component costs for 5G phones, and a widespread push for 4G and 5G rollout in Africa, driven by major investments from carriers and government's digitalization efforts, have led to increasing customer demand for more sophisticated devices. Rising mobile data usage, local manufacturing support in countries like Egypt, and demand for better connectivity for gaming, streaming, and payments are further fuelling growth for 5G-enabled devices.

OLED display penetration reached 42% in Q1 2025 driven by consumer demand for vibrant colors, better contrast, and energy efficiency. Smartphones with display screens wider than 6.5 inches also saw increased adoption, as users preferred higher-resolution, bigger displays for better visibility and smoother interactions with the device and larger displays often paired with bigger batteries for longer use. As the market evolves, this trend highlights a broader industry pivot toward feature-rich, user-centric smartphones that balance functionality with premium appeal.



Insights on Key Brands During Q1 2025

Samsung kept the top position in the market, as shipment grew 15% YoY. It reduced its active smartphone models from 103 to 76, focusing on fewer, stronger products, which was welcomed by customers. The company saw solid growth in the $400+ premium segment as well as in key mid-range A series. The brand is increasingly seeing Saudi Arabia and the UAE as key hubs for distributing smartphones across the MEA region and beyond.

Transsion Group led the MEA smartphone market across its three sub-brands, which totalled a 32% share, up from 29% last year. TECNO rose 31% YoY, the strongest growth among the Transsion brands, driven by higher investments in promotions and retail channels, especially in the mid-range segment. Infinix gained ground in the low-end market but continues to face strong competition from rival Android brands and even from TECNO. itel struggled across most price bands, except in the $50-$74 range, where it holds a dominant 52% share. Transsion faces a challenging year ahead, as newer Chinese brands commit significant resources to the region. TECNO appears best positioned to grow further, while Infinix and itel face uncertainty due to limited support and internal brand overlap.

Xiaomi's shipment dropped 2% YoY, and it reduced its active models from 96 to 74. Despite the decline, it saw strong growth in LTE smartphones with 27% YoY growth, as the company intensified efforts to compete with Transsion in the lower end. As a result, ASP fell by 12% as sales increased mainly in the $50-$99 range. Going ahead, Xiaomi will hope to solidify its market share gains by offering strong devices in the mid-range – a segment targeted by other Chinese OEMs as well.

Apple's shipments grew 4% YoY, raising its market share to 6%. Growth was mainly driven by the launch of the iPhone 16e, a more affordable model starting at $599, which boosted sales in price-sensitive markets. Apple also saw strong demand in the premium segment, especially in Saudi Arabia and the UAE, supported by local retail partnerships, instalment plans, and buy now, pay later options. New Apple Stores in the UAE and increased tourism-related sales in the GCC further contributed to its growth.

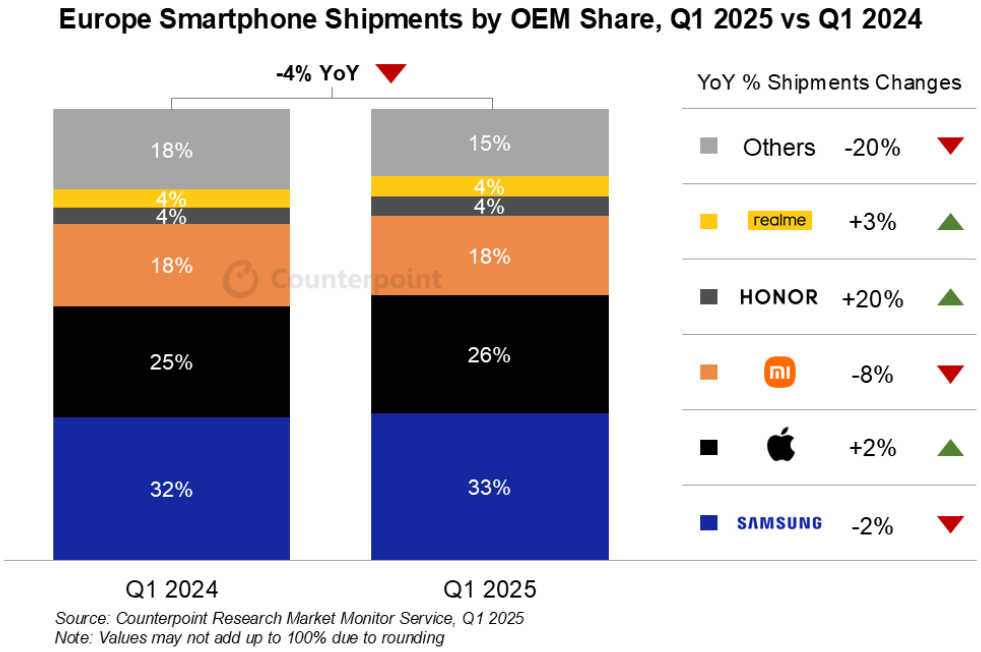
The comprehensive and in-depth 'Q1 2025 Market Monitor Smartphone Tracker' is available for subscribing clients.
Feel free to contact us at press@counterpointresearch.com for questions regarding our latest research and insights.
The Market Monitor research relies on sell-in (shipments) estimates based on vendors' IR results and vendor polling, triangulated with sell-through (sales), supply chain checks and secondary research.
You can also visit our Data Section (updated quarterly) to view the smartphone market shares for the World, US, China and India.

2025 Off to Shaky Start in Europe: Smartphone Shipments Down 4% YoY in Q1

- *Europe's smartphone market has turned negative again, declining for the first time in four quarters.*
- *Brand shares remained largely flat versus Q1 2024. Apple increased its share compared to Q1 2024 thanks to the launch of the iPhone 16e, but its relatively high price limited sales in the region.*
- *HONOR continues to grow well in the region and is now the fourth-largest OEM in Europe.*
- *We expect a challenging first half of 2025 due to uncertainty around the US tariff policy, although a stabilizing economic environment could see a return to growth by the end of the year.*

London, Beijing, Buenos Aires, Fort Collins, Hong Kong, New Delhi, Seoul, Taipei, Tokyo – May 26, 2025

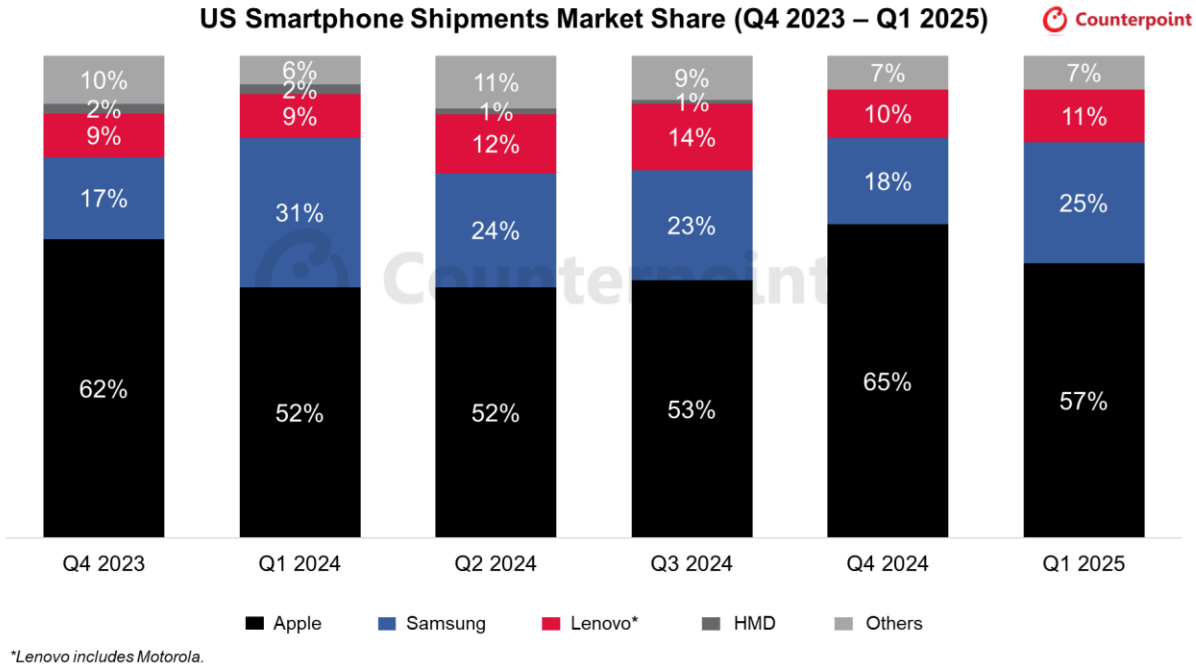
Europe's smartphone shipments declined for the first time in four quarters in Q1 2025, registering a 4% YoY decrease, according to Counterpoint Research's Q1 2025 Smartphone Market Monitor. A challenging economic environment and uncertainty around the new US administration's tariff policies resulted in a disappointing quarter for most OEMs. Despite the turmoil, HONOR emerged as the key winner thanks to its continued aggressive strategy in Europe and a wide portfolio of impressive devices covering all price points.



Associate Director Jan Stryjak said, "Q1 2025 was a difficult time for many OEMs in Europe. Samsung didn't bring much new to the table in its new flagship devices, and the Galaxy S25 underperformed as a result. Meanwhile, the high price of Apple's new mid-tier offering, the iPhone 16e, resulted in relatively poor sales in Europe compared to some other regions. HONOR was the only real bright spot in Q1. The brand's 20% YoY growth during the quarter is a testament to its ongoing strategy to bring strong devices to all segments, whether it is the entry-level X6b, mid-tier 20 series or the dual flagship Magic 7 and V3 premium offerings."

Commenting on the outlook for the rest of the year, Stryjak said, "We expect the challenges of Q1 to continue in the short term, in part due to the ongoing uncertainty around the US tariff policy. However, trade agreements across key markets could see a stabilizing economic environment and a return to growth towards the end of the year."

US Smartphone Market Share: Quarterly



Market Highlights

- Smartphone shipments grew 9% YoY in Q1 2025 due to efforts, especially in March, to circumvent potential tariff-related impacts.
- Apple achieved its highest Q1 shipment share to date at 57% due to the launch of the iPhone 16e, combined with the front-loading of shipments ahead of April.
- Samsung's share declined to 25% from 31% in Q1 2024, partially due to Apple's shipment increase, and also due to lower S25 shipments YoY.
- Motorola also had its biggest shipment share ever in Q1 at 11%, driven by an earlier launch of its G-series line-up in 2025 and improved positioning in prepaid, especially as HMD continued to show weakness in this segment.

US Smartphone Shipments Market Share (%)

Brands	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Apple	62%	52%	52%	53%	65%	57%
Samsung	17%	31%	24%	23%	18%	25%
Lenovo*	9%	9%	12%	14%	10%	11%
HMD	2%	2%	1%	1%	0%	0%
Others	10%	6%	11%	9%	7%	7%

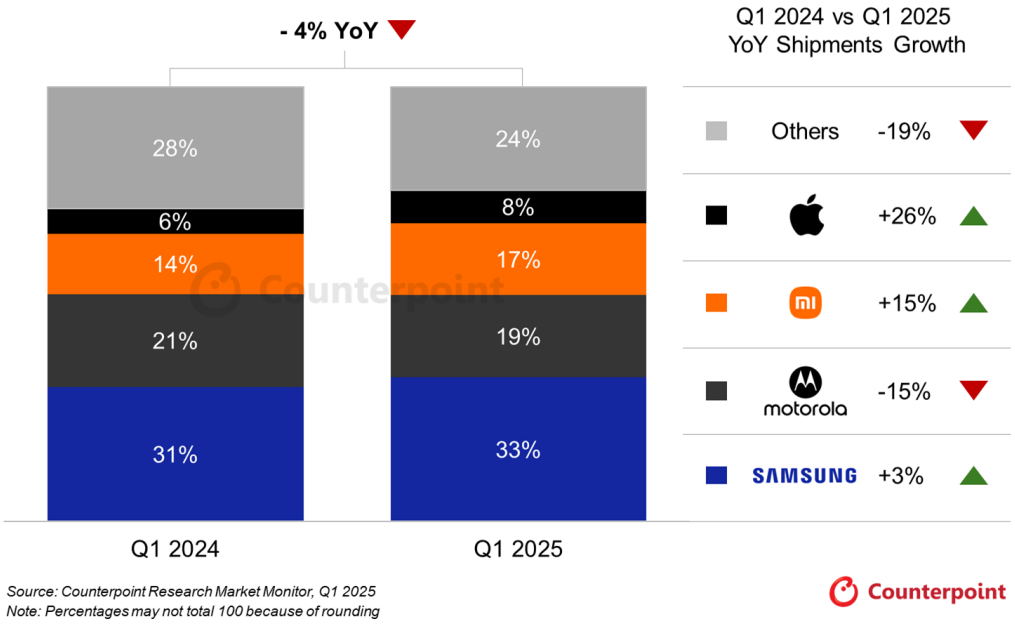
LATAM Q1 2025 Smartphone Shipments Fall 4% YoY after Seven Quarters of Annual Growth

- *LATAM smartphone shipments fell 4% YoY in Q1 2025 as key markets faced difficult economic conditions.*
- *Brazil declined 7% YoY due to unexpected inflation and Mexico fell 12% YoY amid trade disputes with the US.*
- *Argentina's smartphone shipment market recovered, climbing 69% YoY.*
- *Apple and Xiaomi emerged as shipment share winners due to strategic device launches; Samsung's share also rose despite single-digit percentage growth.*
- *Motorola was the only major OEM to see double-digit percentage shipment decline in almost every market.*

Buenos Aires, Beijing, Hong Kong, London, New Delhi, San Diego, Seoul, Taipei, Tokyo – May 29, 2025

LATAM smartphone shipments fell 4% YoY in Q1 2025 to mark the region's first decline since Q2 2023, according to the latest Counterpoint Research Market Monitor report. The region delivered a mixed performance with some countries like Argentina and Chile continuing to grow, while Mexico and Brazil seeing significant declines.

LATAM Smartphone Shipments by OEM Share, Q1 2024 vs Q1 2025



Source: Counterpoint Research Market Monitor, Q1 2025
Note: Percentages may not total 100 because of rounding

In March, Brazil's inflation rate reached 5.4%, the country's highest in two years. Increasing prices are starting to hurt local demand for devices as churn rates are also increasing among mobile carriers. Prepaid subscribers, who are highly sensitive to economic factors, have set alarms as disconnections exceeded subscriptions in Q1 2025.

Mexico barely escaped from technical recession in Q1 2025. The jobs market is slowly growing at pandemic-level rates, which, combined with lower exports amid trade uncertainty, has pushed OEMs to ship lower smartphones into the country. These difficult economic factors will likely hit low-end consumers and prepaid users first.

Argentina's smartphone shipments grew 69% on base effect after a tough H1 2024 which followed the economy bottoming out in 2023. Argentina currently accounts for only 5% of the region's shipment volume but steady growth could help its share rise to double-digit percentages.

- Despite just growing by single-digit percentages compared to its competitors, Samsung maintained its leadership in the overall region and in major countries like Argentina, Brazil, Chile and Mexico. Entry-level smartphone shipments decreased as Samsung has only one device in the segment – the Galaxy A06. However, Samsung's presence grew in higher price bands as it offered both 4G and 5G versions, for example, the Galaxy A series including the A14 and A15 models.
- Apple launched the new iPhone 16e which immediately captured the attention of its customers. The device jumped to the top of the Mexican sales charts in the $700-$800 price segment. It is cheaper than the 16 lineup and has fewer hardware/software downgrades.
- Xiaomi also launched the upgraded Redmi Note 14, which was the cheapest-ever launch of the Redmi Note series. It is currently one of the best value-for-money smartphones in the region.
- Motorola's volume halved in Mexico. In Brazil it fell 10% and in the rest of CALA it declined 19% YoY on an average. The poor performance was due to a supercharged 2024 that overcame expectations and led to an inventory bulk up during Q1 2025. Motorola has delayed its device launches to Q2 2025 as it is searching for better inventory management.

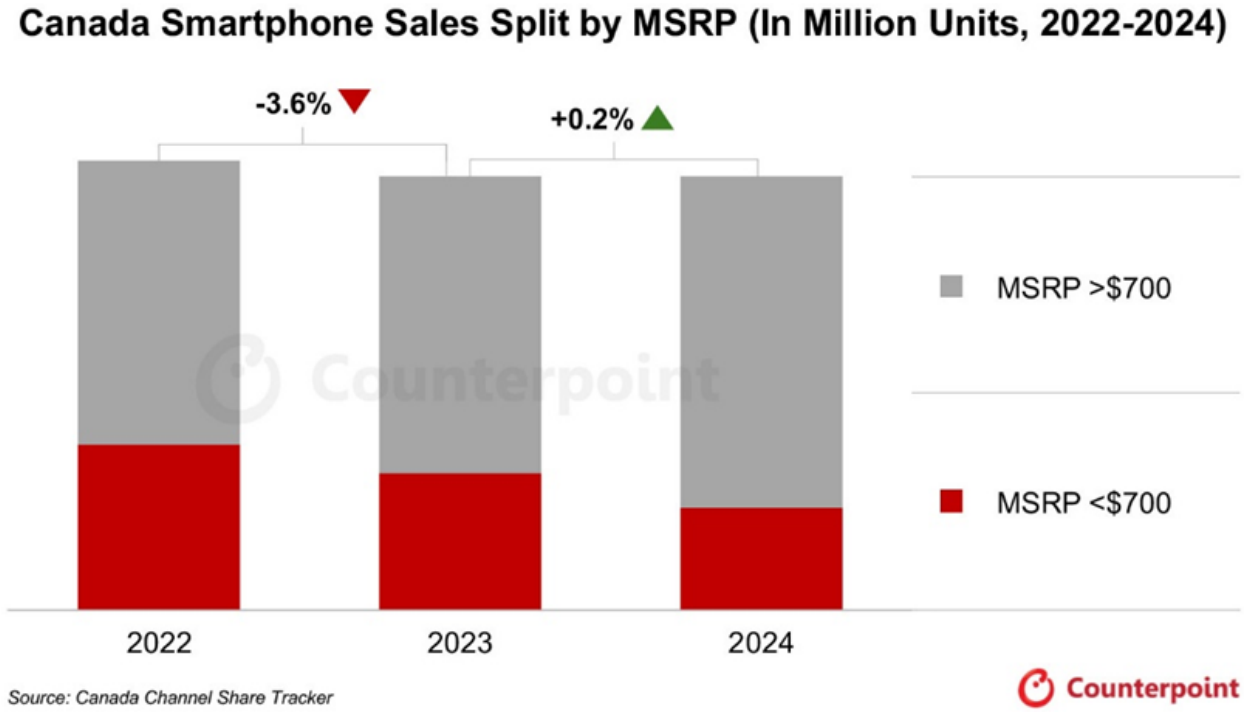
Advanced Features and Promotions Fuel Premium Push in Canada Smartphone Market

- *Advanced technology and consumer preferences are driving the growth of Canada's premium smartphone market.*
- *Apple leads Canada's smartphone market and commands the largest share in the premium segment.*
- *Samsung offers a wide variety of smartphones, from high-end to budget-friendly options. Samsung dominated the mid-tier segment in 2024, while its Galaxy S series has been strengthening the brand's position in the high-end market.*
- *Google's share of Canada's premium smartphone market is also growing steadily.*

Canada, already a premium smartphone market, is mirroring a global trend where an increasing number of consumers are shifting to high-end devices, attracted by advanced features like AI, superior processors, cameras and displays, durability and longer software support. The trend has also prompted manufacturers to release more premium models in pursuit of higher profits. On top of that, Canada's carrier-driven market encourages premium device sales through strong promotions. Major Canadian carriers (Bell, Rogers and TELUS) promote premium plans, sweetening the deal with discounts on top-tier smartphones.

Canada's premium smartphone market is also seeing traction in innovative form factors such as foldable phones, which offer enhanced user experience and productivity. In 2024, Google debuted its foldable device, Pixel 9 Pro Fold in Canada, thus competing with Samsung's Galaxy Fold and Flip series.

According to Counterpoint's **Canada Channel Share Tracker**, over 75% of Canada's smartphone sales in 2024 came from devices with an MSRP (Manufacturer's Suggested Retail Price) of over $ (USD) 700. Apple (iPhone 16 series) and Samsung (Galaxy S series) hold a dominant share of Canada's premium smartphone market. In recent years, Google has made significant inroads in this segment. The high demand for the Pixel 9 series drove a significant rise in Google's premium smartphone market share during 2024.



However, mid-range devices still enjoy importance in the Canadian market, as they broaden reach and accessibility for OEMs. As a result, brands are also focusing on releasing mid-range devices. The iPhone 16e,

Apple’s latest release, starts at $599, while Google’s Pixel 9a starts at $499. Samsung also launched the Galaxy A16 for $199.99 in January 2025 and the A36 for $399.99 in March 2025.

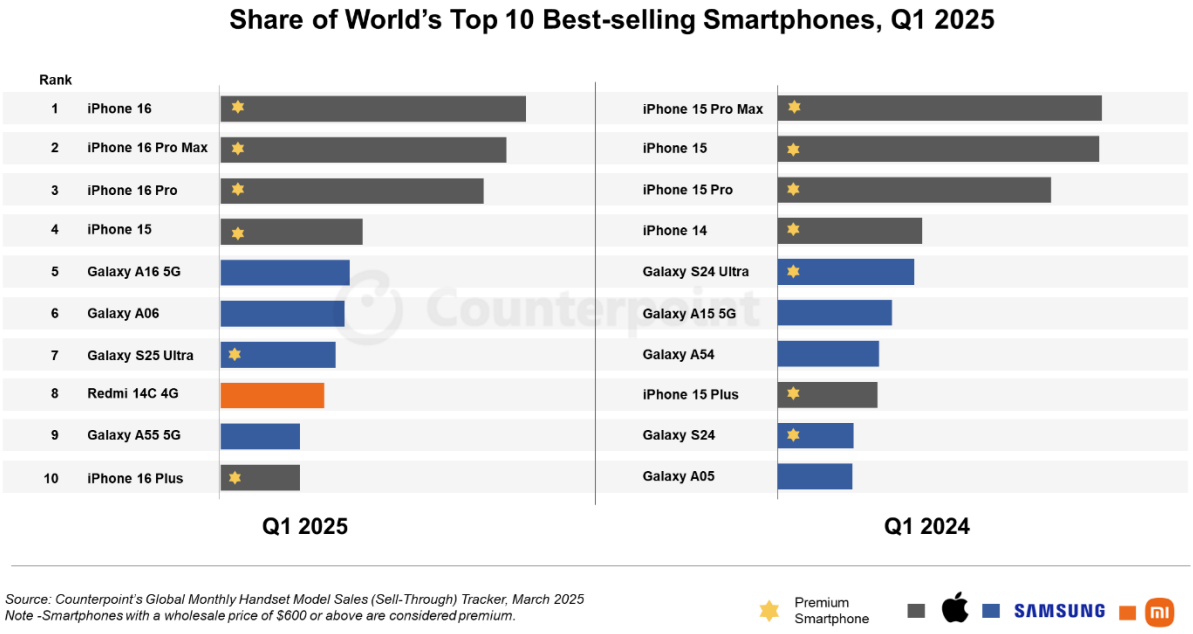
We expect the premiumization trend in Canada's smartphone market to continue throughout 2025.

iPhone 16 Leads Global Smartphone Sales in Q1 2025

- *Apple's iPhone 16 was the best-selling smartphone in Q1 2025. This also marked the return of the iPhone series' base variant to the top spot in the first quarter after a two-year gap.*
- *Samsung's Galaxy S25 Ultra secured the seventh spot in Q1 2025, down from the fifth spot held by the S24 Ultra in Q1 2024.*
- *Xiaomi's Redmi 14C was the only model in the list outside of Apple and Samsung. Most of its sales came from emerging markets like MEA and LATAM.*
- *The low-end smartphone segment (<$100) emerged as the fastest-growing category in Q1 2025, accounting for nearly 20% of global smartphone sales.*
- *The iPhone 16e ranked sixth in the top 10 best-selling smartphones in March 2025, the first full month of the model's sales.*

Seoul, Beijing, Buenos Aires, Fort Collins, Hong Kong, London, New Delhi, Taipei, Tokyo – May 28, 2025

Apple's iPhone 16 was the world's best-selling smartphone in Q1 2025, according to Counterpoint Research's Global Handset Model Sales Tracker. This also marked the return of the iPhone series' base variant to the top spot in the first quarter after a gap of two years. Apple maintained its strong presence in the top-10 list, securing five spots for the fifth consecutive March quarter. Meanwhile, Samsung featured one fewer model compared to the same period last year. While the top 10 smartphones' share in overall global sales remained stable, the low-end (<$100) smartphones in the top 10 saw an increase in their contribution.



The iPhone 16 performed well in Japan and the Middle East and Africa (MEA), with Japan recording the highest growth in base variant sales. Improved economic conditions and revised subsidy regulations favored Apple's pricing strategy and ecosystem, further strengthening its appeal in the Japanese market.

The iPhone 16 Pro Max and iPhone 16 Pro ranked second and third in the list, respectively. The Pro series faced challenges in China due to government subsidies favoring sub-CNY 6,000 (~$833) devices and strong

competition in the country's premium segment from OEMs like Huawei. Despite this, Pro models continued to account for nearly half of Apple's total iPhone sales for the third consecutive quarter.

Apple's iPhone 16e made a strong debut, securing the sixth spot in the global top-10 list for March 2025, its first full month of sales. Despite a higher price compared to the SE 2022, the 16e is expected to outperform its predecessor during its first year. This success will be largely driven by its significant technological advancements and expanded feature set.

Samsung's Galaxy S25 Ultra secured the seventh spot in Q1 2025, down from the fifth spot held by the S24 Ultra in Q1 2024. This shift was primarily due to a shorter sales window for the S25 Ultra during the quarter. Despite the limited availability, the S25 series delivered steady results, contributing one-fourth of Samsung's total smartphone sales in its active sales month. With deeper Gemini integration, the S25 series also signals Samsung's shift toward a more agentic AI experience, enhancing user productivity and personalization.

The Galaxy A16 5G ranked fifth in Q1 2025, moving up one position from the Galaxy A15 5G's ranking in Q1 2024. The model recorded a 17% YoY growth, supported by wider availability in markets such as North America, where it launched in January 2025. North America was the largest market for the A16 5G, accounting for one-third of its total global sales. Additional momentum came from APAC, Latin America (LATAM) and MEA, where it continued to gain popularity in the budget 5G segment.

The Galaxy A06 saw strong growth, climbing four spots in the top-10 list compared to its predecessor in Q1 2024. This growth was part of a broader surge in low-end smartphone demand across all regions. Markets such as the MEA, APAC and LATAM contributed to three-fourths of global sales in this segment. As the supply of low-cost components eased, the segment became the fastest-growing segment in Q1 2025, capturing nearly 20% of total global smartphone sales.

Xiaomi's Redmi 14C 4G was the only model outside of Apple and Samsung to make it to the global top-10 list. It achieved an impressive 43% YoY growth over the Redmi 13C 4G. Most of its sales came from emerging markets, particularly the MEA and LATAM, underscoring Xiaomi's strength in value-driven segments.

Going forward, despite ongoing tariff tensions and broader market uncertainties, the share of the top 10 best-selling smartphone models is expected to remain relatively stable. This resilience is supported by OEMs increasingly focusing on high-end smartphones where consumer interest is driven by premium features.

Counterpoint Conversations: Glance Brings GenAI-powered AI Commerce to Smartphones Globally

Generative AI (GenAI) is poised to significantly disrupt communication, content creation, and commerce. Glance, the company powering hundreds of millions of devices with Smart Lockscreen engine from smartphones to TVs, has launched Glance AI, its first GenAI application for AI-Commerce. It is looking to leverage this trend by integrating GenAI-powered personalization and visualization into areas such as e-commerce at scale.

The Glance AI application uses GenAI to personalize apparel according to your looks, tastes, affinities for brands and clothing style. This is a double-sided business model leveraging AI to connect brands to users in a very engaging and personalized way making it a very powerful platform. The initial demo and experience have been seamless and more so engaging as it is highly personalized and gives you instant style visualizations and inspiration. We took a sneak peek at what Glance is doing with this application, the company's strategy, business model, go-to market strategy and more. We also had a Counterpoint Conversation with Glance founder Naveen Tewari.

The Interview

Below is our analysis on Glance's entry into AI Commerce, building upon the company's traction with personalized content on the Smart Lockscreen with OEMs globally powering more than 300 million smartphones and TVs.

https://www.youtube.com/watch?v=3YtPnD7fBVw&embeds_referring_euri=https%3A%2F%2Fwww.counterpointresearch.com%2F&source_ve_path=OTY3MTQ

Glance AI 1.0: Powerful Positioning, Strategy & Business Model

The initial phase of Glance AI's deployment is expected to lean into an exploratory, entertainment-oriented approach. This involves encouraging users to generate and share personalized looks on social media, aiming for viral dissemination. This strategy serves as a primary marketing mechanism for the platform's early-stage development, fostering engagement, attraction, and user adoption.

Glance AI is designed as a two-sided platform, connecting buyers and marketers with consumers. This architecture facilitates simultaneous personalization and promotion of offerings, leveraging AI to optimize both processes. This dual functionality enhances platform stickiness and enables real-time learning, marketing, and monetization. The integration of curated brand partnerships and personalized promotions across multiple screens, especially given Glance's substantial penetration in hundreds of millions of global mobile devices, underscores its significant scalability.

User Experience and Technological Integration will be the Key to Success

The success of the Glance AI platform will heavily rely on its seamless user experience (UX). This encompasses the entire process, from a highly accurate personalization AI model and comprehensive brand catalogues to virtual try-ons and streamlined checkout flows. While Glance AI is anticipated to integrate deeply within the Android ecosystem, its iOS presence will likely manifest as a standalone application, akin to existing e-commerce platforms. This positions Glance AI to potentially evolve into a more intelligent and personalized alternative to established commerce applications like Myntra, AJIO, or Zalando.

Something to Watch Out For: Scalability and Cost Management Challenges

A critical technical consideration for Glance AI is the efficient scaling of its infrastructure. Since this application is free and available across 140 countries and millions of users, the rapid generation of billions of images daily or monthly by millions of users using GenAI could lead to huge spikes in computational resources and prohibitive computational costs. To mitigate these expenses, a strategic shift towards on-device, local, or

hybrid GenAI models will be essential. Alternatively, the platform must establish robust monetization streams from its inception to offset these escalating operational expenditures.

Google has also launched a new shopping experience in its AI mode for AI-powered search, try-ons and price tracking but not a full-fledged commerce platform yet. But this will be a competitive battleground for Glance as companies such as Myntra, Amazon Fashion and others come up with similar platforms.

Analyst Take

- Glance AI is a new and powerful way of user interaction leveraging GenAI, applicable to commerce across one vertical such as fashion.
- This will then be scaled to different behavior LLMs for different use cases – commerce for eyewear, shoes, grocery, location-based services, and others.
- Furthermore, the platforms business model is scalable and multi-sided, making it a win-win for everyone with revenue sharing.
- Glance will have to crack key partnerships and try deeper integration with OS, OEMs and model players.

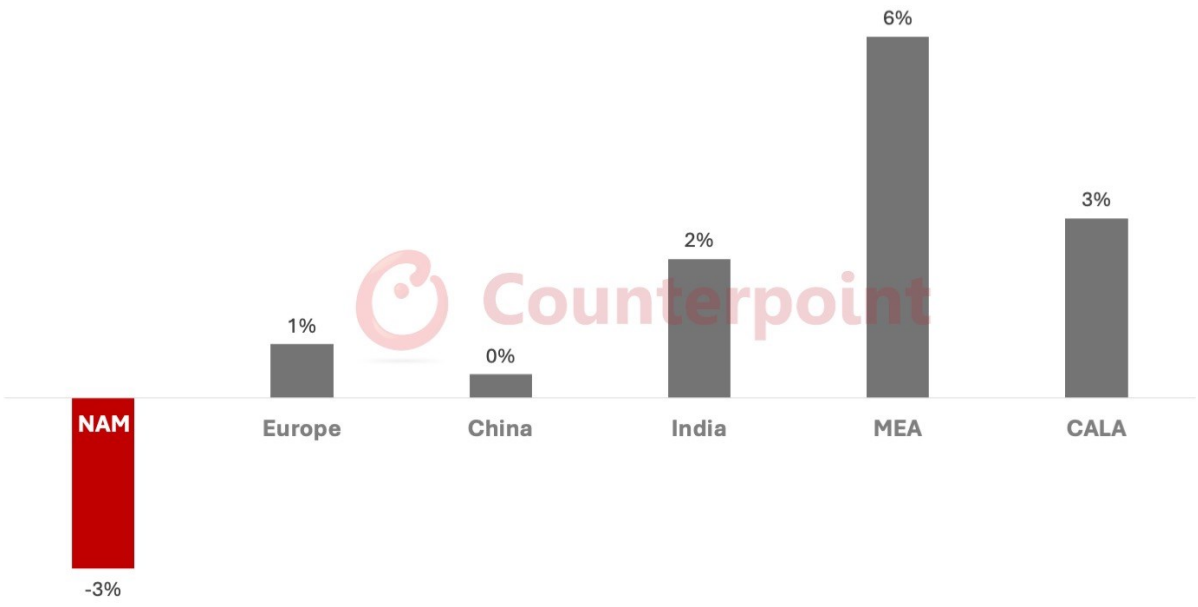
Counterpoint Lowers 2025 Global Smartphone Shipment Forecast on US Tariff Uncertainty

- *Counterpoint Research has revised down its 2025 global smartphone shipment growth forecast to 1.9% YoY from 4.2% YoY, citing renewed uncertainties surrounding US tariffs.*
- *Most regions are expected to grow, except North America and China.*
- *North America is expected to decline due to expected price increases from tariffs.*
- *China has been revised down to near-flat YoY growth on weaker-than-expected market reaction to the government's subsidy program.*
- *Apple and Samsung's growth projections have been revised down as cost increases are expected to be passed on to consumers, hurting demand — this despite some easing of the tariff burden compared to earlier worst-case scenarios.*
- *Huawei's growth outlook has been upgraded due to easing supply chain bottlenecks and sustained momentum from its self-developed chips.*

Beijing, Fort Collins, Hong Kong, London, New Delhi, Seoul, Taipei, Tokyo – June 4, 2025

Counterpoint Research has revised down its 2025 global smartphone shipment growth forecast to 1.9% YoY from the previous 4.2% YoY, in light of the renewed uncertainties surrounding US tariffs. However, most regions will still likely see growth, except North America and China, according to Counterpoint Research's latest Market Outlook Smartphone Shipment Forecast Report.

2025 Smartphone Shipment YoY Growth Expectations by Region



Source: Counterpoint Research Market Outlook Smartphone Shipment Forecast Report.

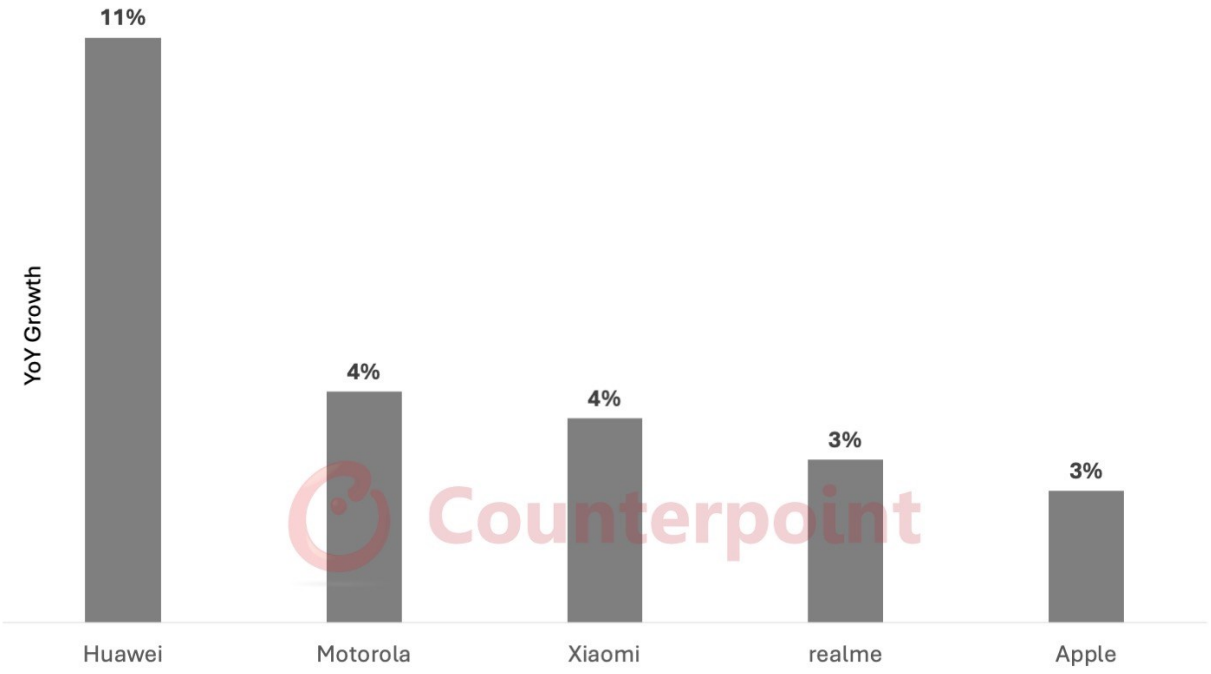
Price increases from cost pass-throughs remain a key focal point, although the tariff situation remains fluid and unpredictable.

Commenting on the revised forecast, **Associate Director Liz Lee** commented, "All eyes are on Apple and Samsung because of their exposure to the US market. Although tariffs have played a role in our forecast

revisions, we are also factoring in weakened demand not just in North America but across Europe and parts of Asia."

Lee added, "We still expect positive 2025 shipment growth for Apple driven by the iPhone 16 series' strong performance in Q1 2025. Moreover, premiumization trends remain supportive across emerging markets like India, Southeast Asia and GCC – these are long-term tailwinds for iPhones."

2025 Top 5 Global Smartphone Brands by YoY Shipment Growth (%)



Source: Counterpoint Research Market Outlook Smartphone Shipment Forecast Report.

Counterpoint Research's current forecasts assume a relatively stable tariff environment through 2025, although the escalating rhetoric and uncertainty around trade policy could significantly impact OEM pricing strategies, supply chain planning, and, ultimately, consumer demand.

Commenting on projections for global smartphone shipment growth in 2025, **Associate Director Ethan Qi** said, "The bright spot this year – again – will likely be Huawei. We are seeing an easing around sourcing bottlenecks for key components at least through the rest of the year, which should help Huawei grab substantial share in the mid-to-lower-end segments at home."

Qi added, "Is 2025 the breakout year for Huawei globally? It might be a bit soon for that but increasing supply chain strength will definitely help the brand establish a better foothold overseas in the medium term."

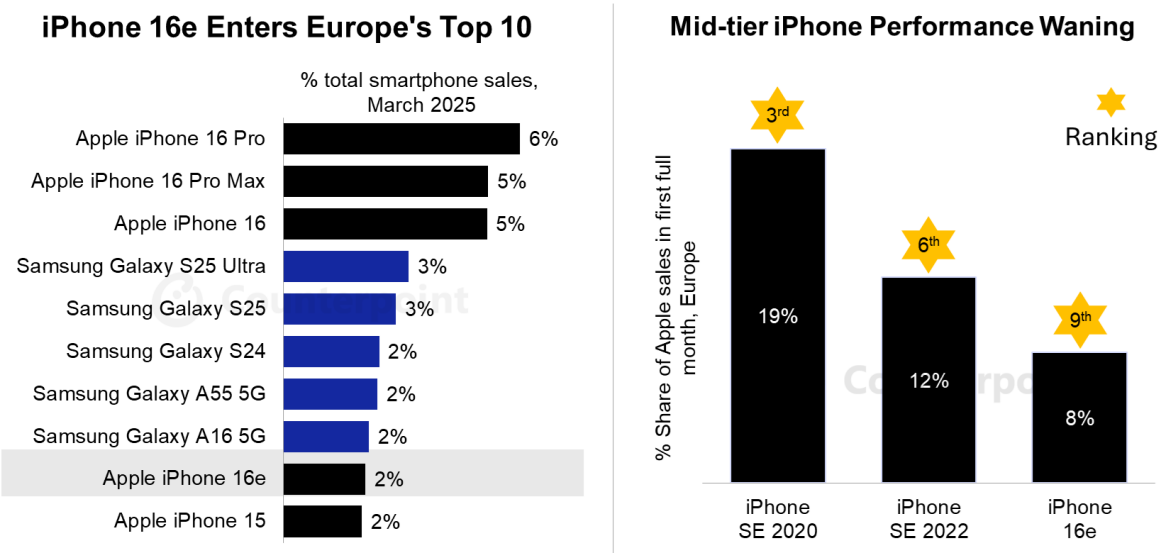
iPhone 16e Enters Europe's Top 10 in First Month

- *Apple's latest mid-tier offering iPhone 16e was the ninth best-selling smartphone in Europe in its first full month of sales, accounting for 8% of Apple's sales and 2% of total smartphone sales in March 2025.*
- *The model sold even better in Western Europe, where it reached seventh position.*
- *However, initial sales were not as strong as Apple's previous mid-tier offerings, the iPhone SE 2022 and iPhone SE 2020, both of which accounted for a greater proportion of sales and took higher spots in Europe's bestseller list.*
- *The relatively high price of the iPhone 16e, coupled with a general market slowdown and expanded availability of refurbished iPhones in Europe, has muted its performance in the region.*

London, Beijing, Buenos Aires, Fort Collins, Hong Kong, New Delhi, Seoul, Taipei, Tokyo – June 2, 2025

Apple's iPhone 16e, launched at the end of February 2025, went straight onto Europe's best-selling smartphones list in its first full month of sales. According to Counterpoint Research data, the iPhone 16e was the ninth best-selling smartphone in Europe, accounting for 8% of Apple's sales and 2% of total smartphone sales in March 2025. The model sold even better in Western Europe, where it reached seventh position.

However, sales decreased significantly compared to Apple's previous mid-tier offerings. In the first full month of sales, the iPhone 16e was 17% down on the iPhone SE 2022 and 20% down on the SE 2020. The iPhone SE 2022 and iPhone SE 2020 also accounted for a larger proportion of Apple's sales in the first month (12% and 19% respectively), compared to 8% for the iPhone 16e. They also featured higher on Europe's bestseller list (sixth and third respectively).



Associate Director Jan Stryjak said, "The relatively high price of the iPhone 16e compared to previous iPhone SE devices has limited sales in Europe. At €699 ($599), the 16e is a significant jump from the €519 ($429) launch price of the iPhone SE 2022 and €479 ($399) for the iPhone SE 2020, which has reduced its appeal in this challenging economic climate. Also, some places are offering the iPhone 15 for the same price as the iPhone 16e, so many consumers are opting for arguably the better-specced, albeit nearly two-year-old, device. As such, the iPhone 15 also featured in Europe's top-10 list for April."

Q1 2025 Global Smartphone Sales, Top 10 Best Sellers

Global Top-10 Best-Selling Smartphones, Q1 2025

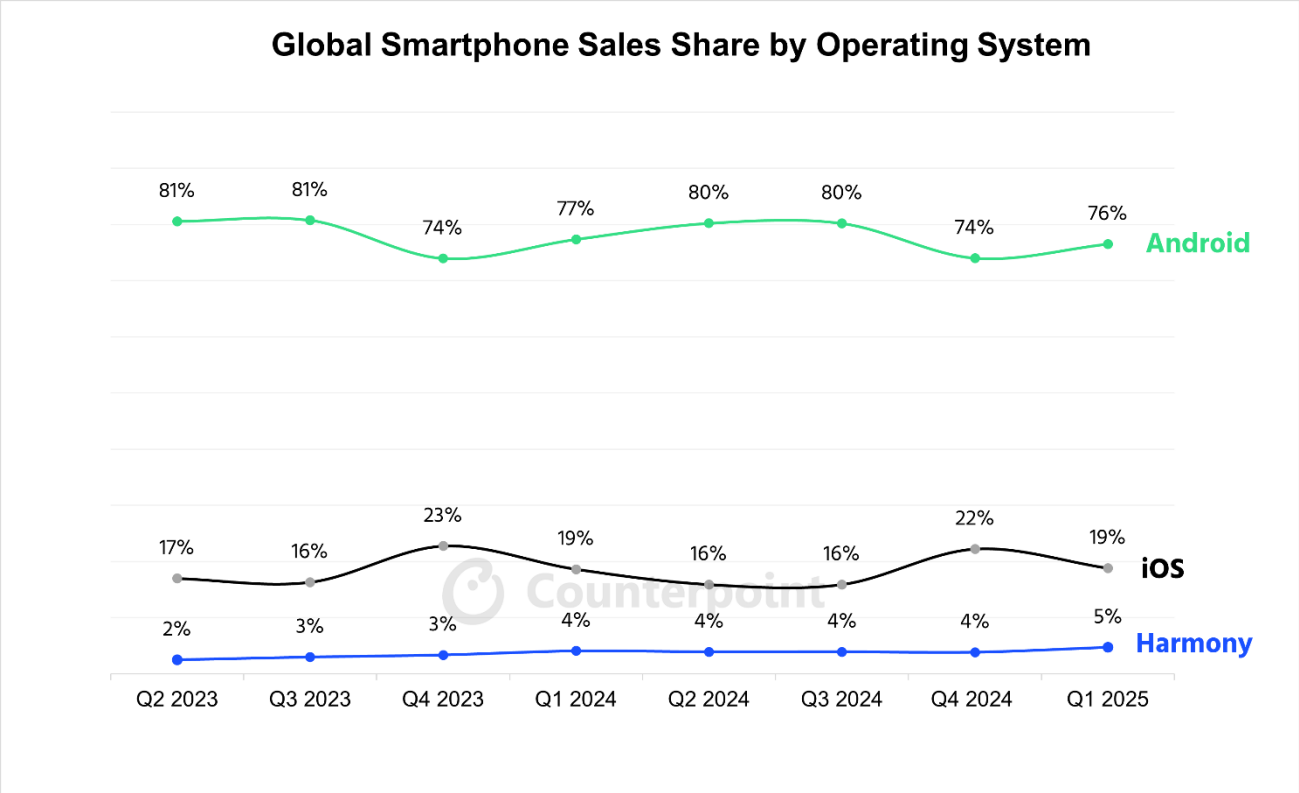
Brand	Model Name	Global Sales Rank				
		2024				2025
		Q1	Q2	Q3	Q4	Q1
Apple	iPhone 16			22	3	**1**
Apple	iPhone 16 Pro Max			13	1	**2**
Apple	iPhone 16 Pro			17	2	**3**
Apple	iPhone 15	2	1	1	4	**4**
Samsung	Galaxy A16 5G				22	**5**
Samsung	Galaxy A06 4G			64	15	**6**
Samsung	Galaxy S25 Ultra					**7**
Xiaomi	Redmi 14C 4G			100+	16	**8**
Samsung	Galaxy A55	100+	12	12	9	**9**
Apple	iPhone 16 Plus			100+	11	**10**

Source: Counterpoint Research Smartphone 360 – Global Handset Model Sales Tracker, Q1 2025

Market Highlights:

- Apple's iPhone 16 was the best-selling smartphone in Q1 2025, marking the return of the iPhone series' base variant to the top spot in a first quarter after a two-year gap.
- Apple led the list with five positions as the entire iPhone 16 series marked its presence.
- Samsung had the second largest presence in the list with four spots, one less than last year.
- Samsung's Galaxy S25 Ultra captured the seventh spot, down two spots from its predecessor last year. The later launch of the S25 Ultra can be attributed to the rank change.
- Samsung's Galaxy A06 4G was the leading 4G smartphone owing to higher sales in emerging markets like Latin America, and Middle East and Africa.
- The Redmi 14C 4G captured the eighth spot, marking Xiaomi's presence for a first quarter since 2022.

Global Smartphone Sales Share by Operating System



Market Highlights

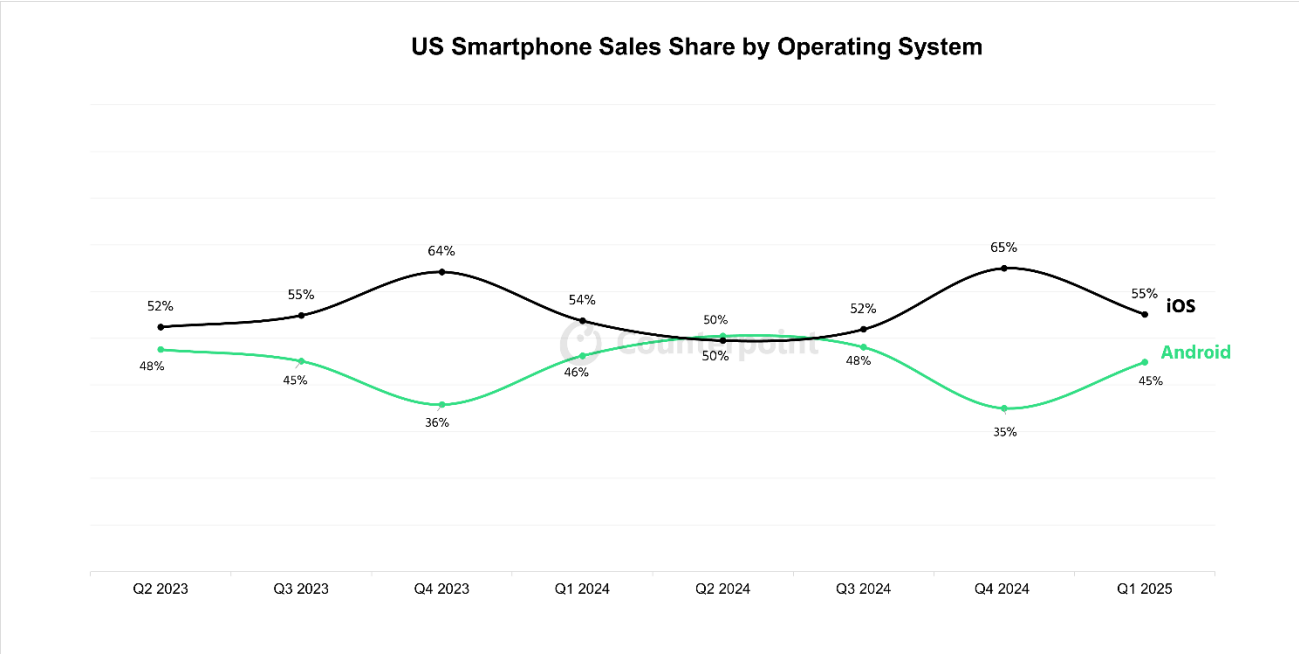
- Global smartphone sales grew 3% YoY in Q1 2025. The OS share remained largely flat at the global level, while the regions remained dynamic.
- The global share of Android continued to decline gradually, reaching the lowest March quarter value since 2018. The decline can be attributed to growing sales of iPhones across key regions like India, Japan and MEA. The growth of key OEMs like Xiaomi, vivo and Motorola limited the OS share decline.
- iOS' share remained flat globally as Japan alone offset the decline faced by Apple across its key premium regions – China, Europe and South Korea. The OS share declined the highest in China owing to growing competition and government subsidy benefitting local OEMs.
- Harmony OS reached a 5% global share and 19% in China. Despite limited regional presence, Huawei continued to outpace the competition, leading China's smartphone market for the second consecutive quarter. Government subsidies further aided the OEM in accelerating its sales momentum for the quarter.

Global Share	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Android	81%	81%	74%	77%	80%	80%	74%	76%
iOS	17%	16%	23%	19%	16%	16%	22%	19%
Harmony	2%	3%	3%	4%	4%	4%	4%	5%

Global Share	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Total	100%	100%	100%	100%	100%	100%	100%	100%

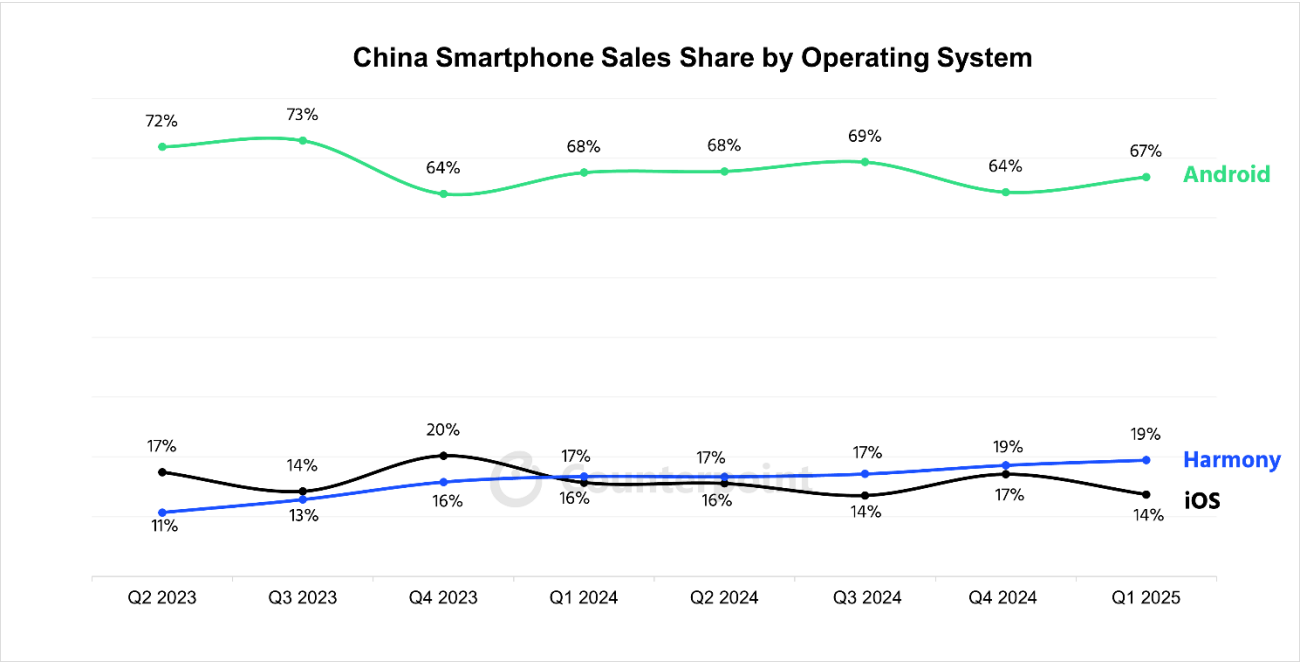
iOS vs Android Quarterly Market Share for USA, China and India

US Market



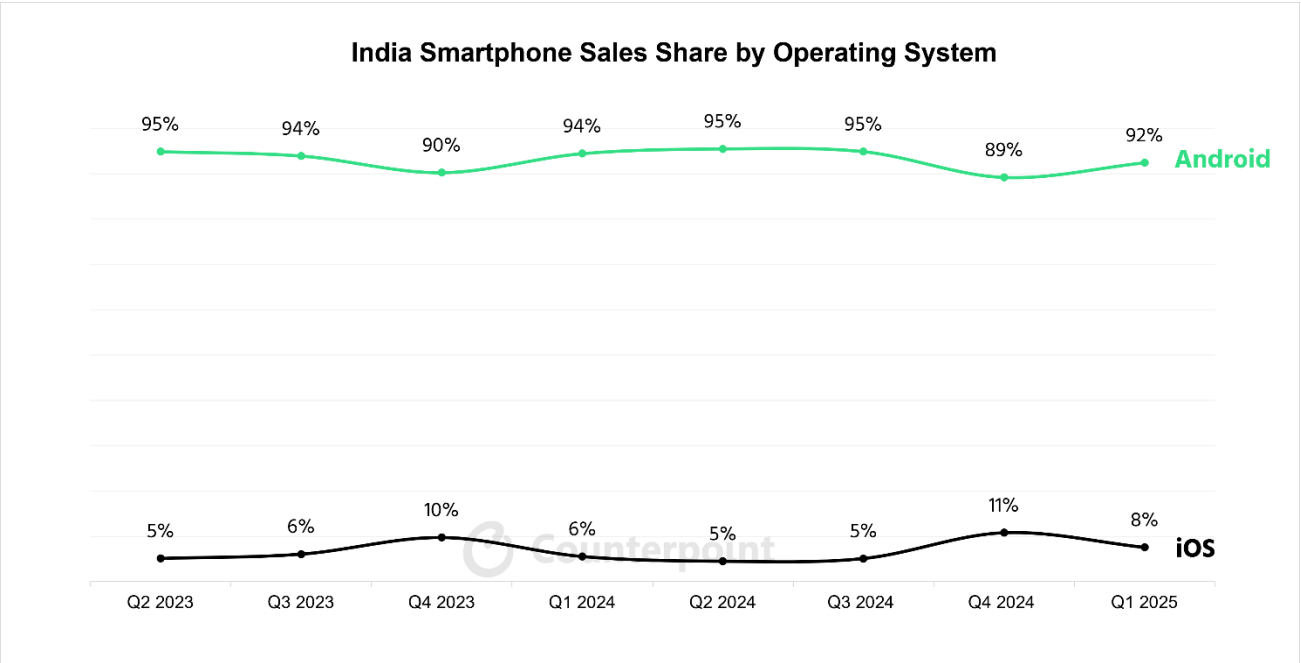
USA Share	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
iOS	52%	55%	64%	54%	50%	52%	65%	55%
Android	48%	45%	36%	46%	50%	48%	35%	45%
Total	100%	100%	100%	100%	100%	100%	100%	100%

China Market



China Share	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Android	72%	73%	64%	68%	68%	69%	64%	67%
Harmony	11%	13%	16%	17%	17%	17%	19%	19%
iOS	17%	14%	20%	16%	16%	14%	17%	14%
Total	100%	100%	100%	100%	100%	100%	100%	100%

India Market



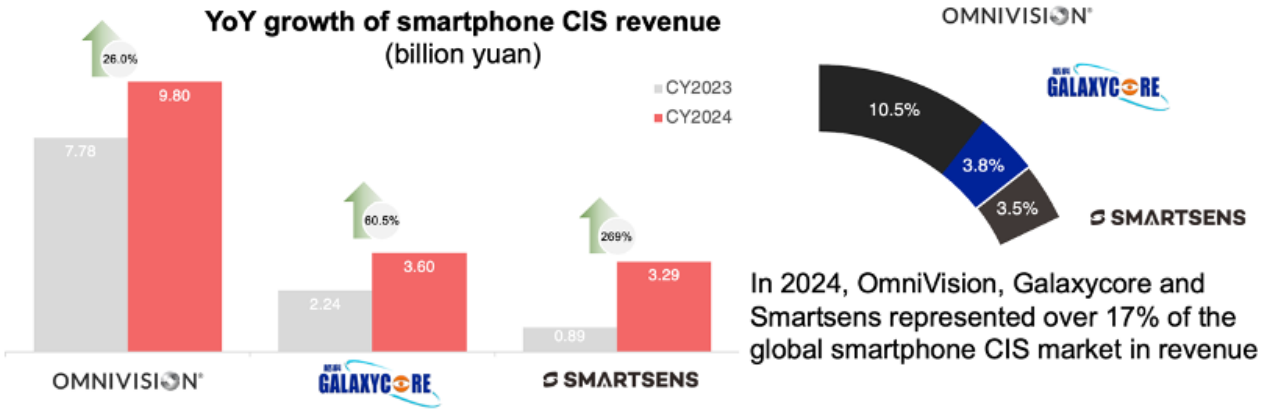
India Share	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Android	95%	94%	90%	94%	95%	95%	89%	92%
iOS	5%	6%	10%	6%	5%	5%	11%	8%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Increasing Adoption of Domestic 50MP CIS Boosts Revenue of Chinese Image Sensor Companies

- *In 2024, China's top three CMOS image sensor companies collectively reported nearly CNY 16.7 billion in revenue from smartphone applications, up 52.9% compared to the previous year.*
- *This growth was on the back of critical technical advancements in 50MP lineups and strengthening partnership with Chinese smartphone OEMs.*
- *2025 is expected to record consecutive double-digit growth driven by growing LOFIC and multispectral demands and the shift to domestic 1-inch and 200MP alternatives.*

China's top three CMOS image sensor companies – OmniVision, Galaxycore and Smartsens – saw significant growth in their CIS sales for smartphone applications in 2024, with their revenues reaching $1.37 billion, $0.5 billion and $0.46 billion, respectively. For the first time, Chinese image sensor companies' market share as a whole exceeded 17% of the global smartphone CIS market in revenue terms.

Chinese Image Sensor Vendors Achieved Significant YoY Growth in 2024



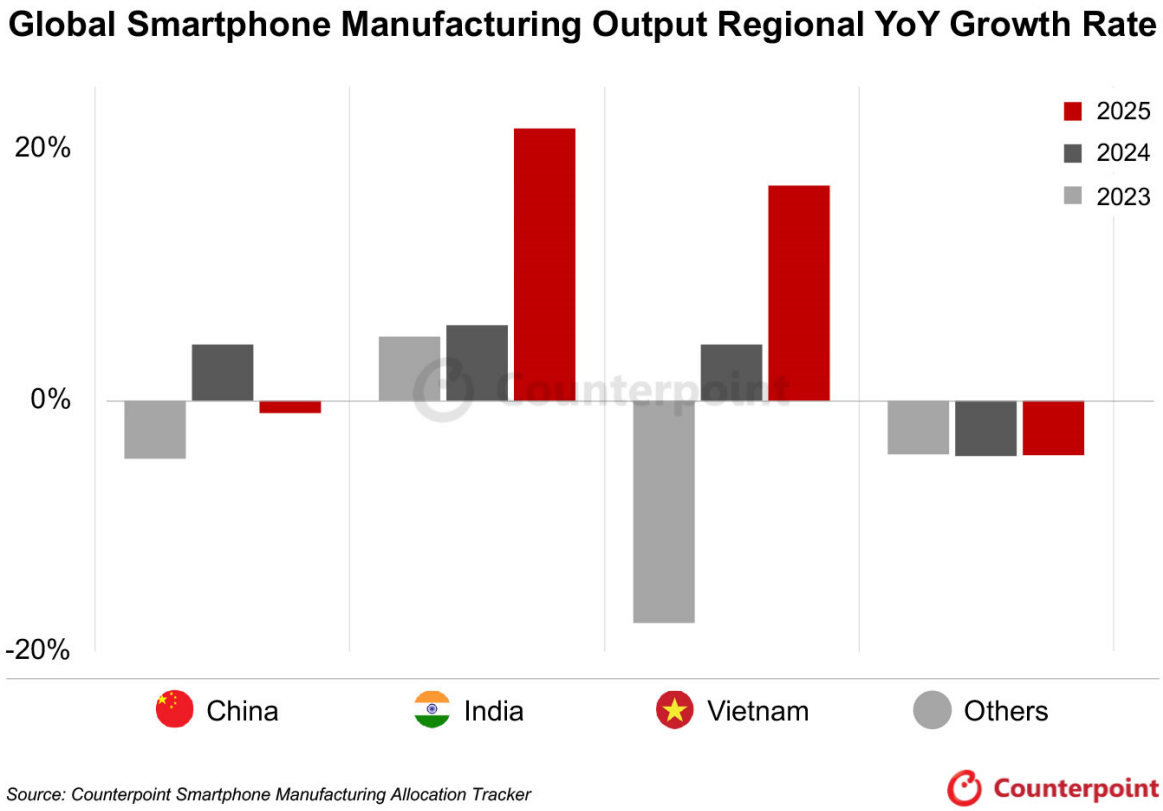
These image sensor companies have upgraded their products leveraging proprietary technologies and diversified production capabilities. They can offer a broad range of 50MP image sensors, with pixel sizes extending from 0.6μm through to 1.6μm. they have also developed LOFIC and multispectral sensors customized to clients' flagship products. Against this backdrop, they strengthened collaborations with Chinese OEMs including Huawei, Xiaomi and HONOR. Chinese smartphone OEMs are now widely adopting 50MP image sensors from the abovementioned companies, with the adoption gradually extending from mass-market smartphones to premium smartphones.

In 2025, there will be more intense competition between OmniVision, Smartsens and Galaxycore, leading to shipments of domestic 50MP sensors crossing the 200-million mark. OmniVison and Smartsens will gain greater content in 2025 in new flagship smartphones with the migration to domestic 1-inch sensors and increasing LOFIC adoption.

Global Smartphone Manufacturing to Weaken in 2025, India to Buck Trend

- *In 2025, global smartphone manufacturing output is expected to decline by 1% due to tariff impacts and a broader industry slowdown.*
- *China will feel the effects of tariffs in 2025, resulting in output declines and domestic underperformance.*
- *India is set to be the big winner in 2025, with output growing in double-digit percentages to reach a record 20% share of global output, fuelled by export demand from Apple and Samsung.*
- *Vietnam, as a global manufacturing export hub, will also see robust growth driven by Samsung and Motorola amid the pressure of tariffs and manufacturing relocation.*
- *Other geographies are driven by local market conditions, and we see continued declines mirroring their temporarily small positions in global manufacturing output, while smartphone demand remains constrained.*

Global smartphone manufacturing output is expected to slip 1% YoY in 2025 due to tariff impacts and a broader industry slowdown, following a 4% rise in 2024, according to Counterpoint Research's latest global smartphone manufacturing allocation tracker. China, India, and Vietnam were responsible for more than 90% of the global manufacturing output in 2024, with India leading in terms of growth. However, in 2025, manufacturing outputs from different countries are expected to show mixed performances.



China will feel the impact of tariffs in 2025, which will result in declining output coupled with forecast domestic underperformance. Commenting on the trend, **Counterpoint Research Senior Analyst, Ivan Lam**, said, "The global smartphone manufacturing shift has been accelerating after the COVID-19 pandemic, but the tariffs have hurt industry players at every level – from upstream component suppliers to downstream importers

and distributors, brands to manufacturers. Consequently, brand owners have no choice but to move out of China and allocate more production capacity and output in other countries. The main winners are India, which has significant growth potential, and Vietnam, which is relatively closer to China and has a mature contract manufacturing and export sector for consumer electronics."

India is set to be the big winner in 2025. The country is expected to record double-digit percentage growth during the year to captured a 20% share of the global output, fuelled by export demand from Apple and Samsung. Vietnam, as a global manufacturing export hub, will also see strong growth driven by Samsung and Motorola.

Observing the recent manufacturing growth spurt in India, **Counterpoint Research Senior Analyst, Prachir Singh,** stated, "With traditional global EMS giants continuing to invest in India and local EMS actively participating, the country's local manufacturing capabilities have significantly improved and are now capable of meeting higher production demands – after nearly a decade of refinement. Meanwhile, India's overall manufacturing ecosystem is continuously growing, and local manufacturing is consistently improving, both in terms of yield and complexity. To further boost the component ecosystem, the government recently launched the Electronics Components Manufacturing Scheme (ECMS), incentivizing companies to invest and build in the country."

Meanwhile, other geographies, driven by local market conditions, will likely see continued declines mirroring their current small and constrained positions in global manufacturing and the weakening of smartphone demand in their domestic markets.

We see India as the long-term winner based on the current global scenario. **Counterpoint Research VP, Neil Shah**, pointed out, "If Apple really produced an iPhone in a US factory, considering that everything is not in place yet, my estimate is that the price will go up by at least 15%-20%, i.e. $150-$200. We believe this cost increase will be mostly due to the cost delta of labor, factories' amortized CAPEX, and logistics." Shifting supply chains is not an overnight task; it requires significant effort, capital, and time. Countries like China, India, and Vietnam took decades to build and achieve their current capabilities and capacities.

Europe's Foldable Smartphone Market is Flatlining, but Competition Continues to Intensify

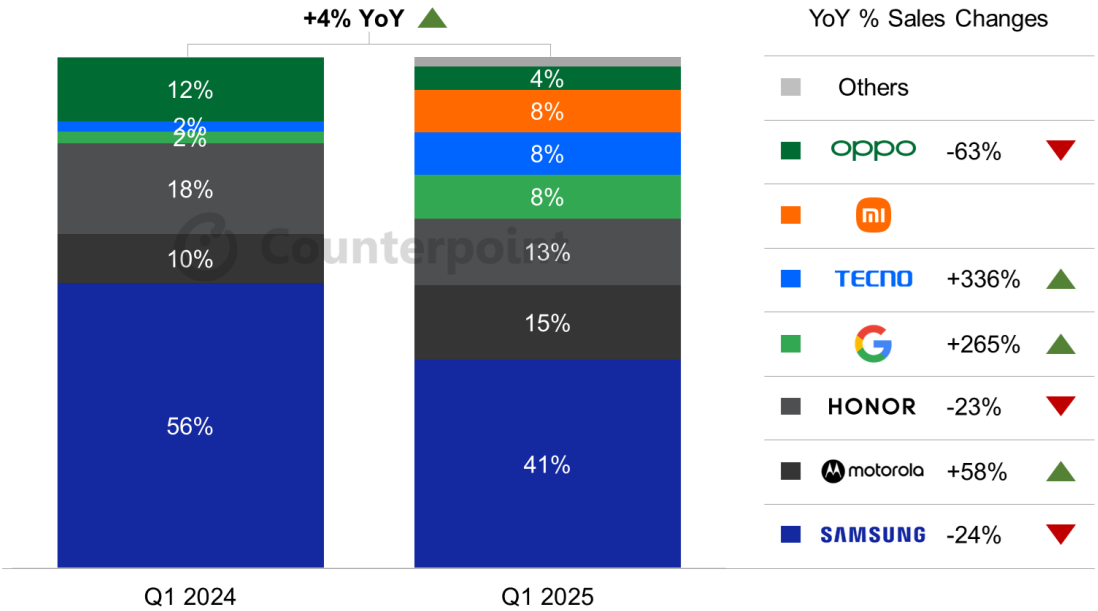
- *Foldable smartphones remain a niche segment, accounting for just 1.5% of smartphone sales in Europe in Q1 2025. Sales only grew by 4% YoY in Q1 2025, amid ongoing concerns around price, durability and use cases.*
- *Samsung still led the market, despite losing significant share since Q1 2024 amid increasing competition from multiple vendors.*
- *Motorola overtook HONOR to become Europe's second-largest foldable smartphone vendor. Google, Xiaomi and TECNO also grew well over the year following the launches of some impressive devices.*
- *Samsung is expected to launch its latest foldable smartphones in July and has teased an Ultra variant to compete with HONOR for the title of the slimmest book-type foldable available in Europe.*
- *Increased competition in the foldables segment is key to driving innovation, which will, in turn, hopefully result in a drop in prices and faster future growth.*

London, Beijing, Buenos Aires, Fort Collins, Hong Kong, New Delhi, Seoul, Taipei, Tokyo – June 9, 2025

Europe foldable smartphone sales grew 4% YoY in Q1 2025 to account for just 1.5% of the total smartphone sales in the region, further illustrating foldables as a niche segment, according to **Counterpoint Research Global Handset Model Sales Tracker**.

Commenting on the flatlining growth, **Counterpoint Research Associate Director Jan Stryjak** said, "For an emerging segment supposedly in its early growth stage, 4% YoY growth is a worrying sign. Despite all the attention new foldable devices receive, they are still too expensive for mass-market appeal. Further, most consumers are still not sure what a foldable phone is for, and many still have concerns about the durability and longevity of the devices."

Europe Foldable Smartphone Sales by OEM Share, Q1 2025 vs Q1 2024



Source: Counterpoint Research
Note: Values may not add up to 100% due to rounding

Nevertheless, competition has increased markedly over the last year. While Samsung remained the clear leader in Q1 2025, other vendors have grown considerably. Motorola overtook HONOR to become Europe's second-largest foldable smartphone vendor in Q1 2025, largely due to its more affordable Razr 50 flip phones. Google, Xiaomi and TECNO also saw robust growth over the year following the launches of some impressive devices, some also at more attractive price points.

Stryjak added, "However, Europe's foldable market is changing. Samsung dominated for a long time with devices that did not seem to change much year on year, but other vendors have released some fantastic models, for example, the HONOR Magic V3, the Motorola Razr 50, the Google Pixel 9 Fold and even the TECNO Phantom V Fold 2. These devices are bringing the fight to Samsung in Europe. Increased competition is always a good thing, driving innovation and pushing down prices. And Samsung has taken note, teasing the launch of an Ultra variant of its upcoming Galaxy Fold7 series. This will hopefully give the segment the shot in the arm it needs."

Apple Intelligence Review – Part 2: On-device AI Elevates Creativity with Image Playground, Genmoji and Photo Editing Tools

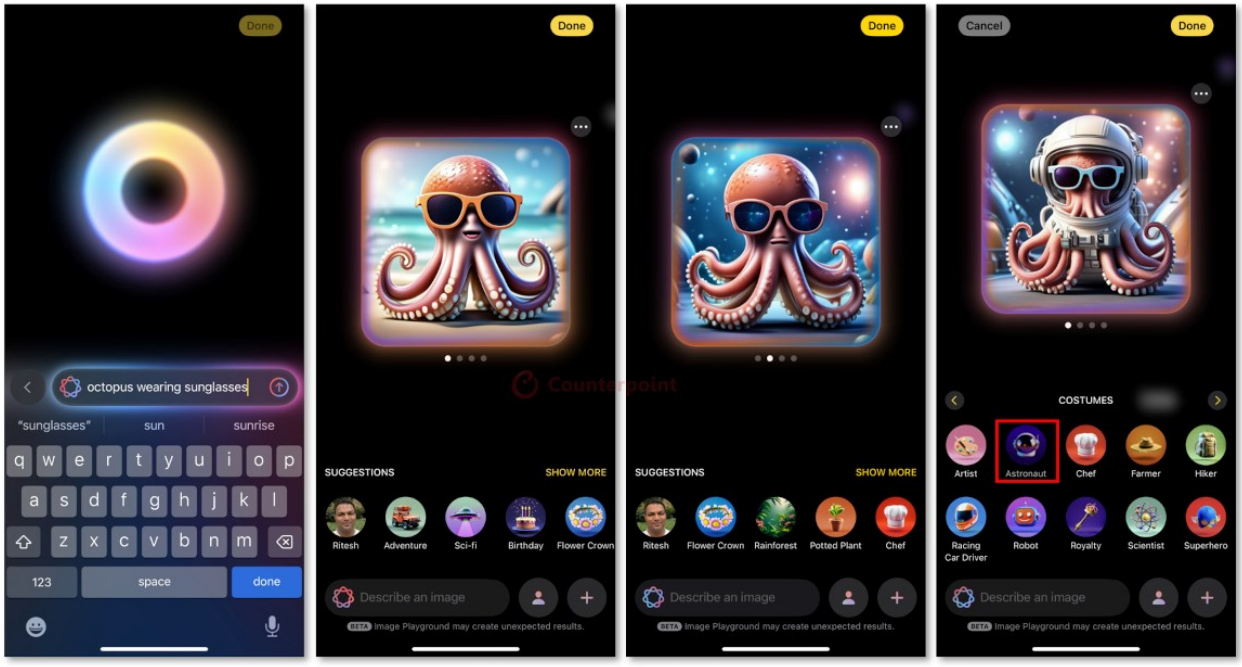
- *Following a detailed assessment of Apple Intelligence's productivity tools, we now turn our attention to the fun side of the AI system with Image Playground, Gemoji and the Photo Clean Up tool.*
- *These tools let you generate images and stickers using text descriptions, and are accessible across compatible iPhones, iPads, and Macs.*
- *In the Notes app on iPhones and Macs, there is also a new Magic Wand tool that uses GenAI to convert your rough sketches into art.*

In Part 1 of our Apple Intelligence review, we covered the productivity side, including Writing Tools, Summarization and Notification Management. In Part 2, we are taking a closer look at Generative AI (GenAI)-based creativity tools, Image Playground and Genmoji, that are directly integrated into the OS and across various apps. These tools are designed to make communication more visually engaging and personalized, and they work on-device. In this review, we will also talk about the Clean Up tool that can remove distractions and unwanted objects from photos.

Image Playground: Fun meets creativity, generates images from text prompt

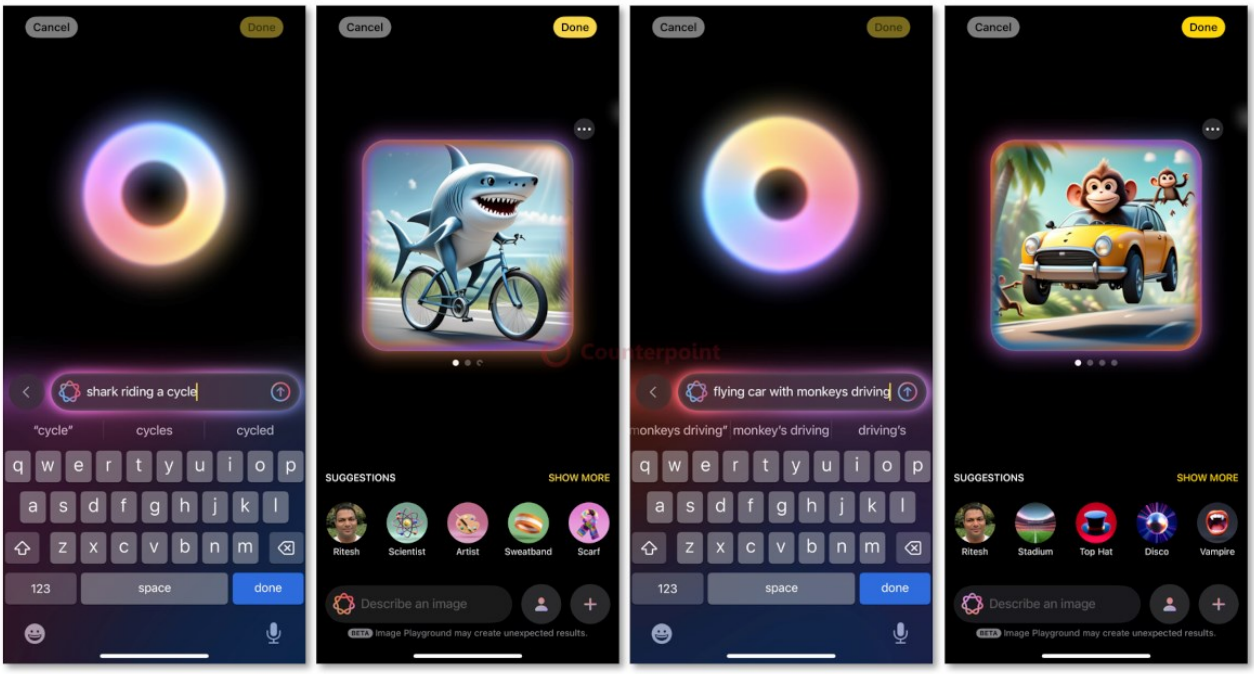
Image Playground is Apple's take on stable diffusion for text-to-image generation. The beauty here is that it allows your imagination run wild and create images with simple descriptions. From flying cars to flying fish, or a shark riding a bicycle or an octopus wearing sunglasses, the possibilities are endless.

The app also offers suggestions in the form of themes, like parties, fireworks, and birthdays, to name a few. Other suggestions include costumes, accessories, and places. For instance, you can have a text prompt like "octopus with sunglasses", and then you can add a theme as well, like space, and add another prompt like "astronaut", which will add a space suit on it.



You can also choose a photo from your gallery and create a new image in three different styles such as animation, illustration and sketch. You can then add themes, like superhero, robot, astronaut and so on. You can also add a description like add a hat, sunglasses and more.

Now, the beauty of Image Playground is that it is deeply integrated with Apple's first-party apps like iMessage, Notes, Keynote, and others. This allows the user to add a new dimension to the conversation by sharing created content with others. This also eliminates the need to jump between different apps or rely on third-party services for image generation.



However, there is a catch. As we discussed in our review in Part 1, there is no integration with third-party apps like Messenger, WhatsApp, Microsoft Teams and so on. Users have to use the Image Playground app to generate an image, then save it to the gallery and then send them to contacts on these third-party apps. Secondly, Image Playground only allows you to generate basic images. ChatGPT, Gemini and CoPilot allow for more complex prompts for image generation. For instance, this prompt was unable to process the prompt "generate an image of a girl in her 30s standing on a beach next to her boat and a beach bungalow in

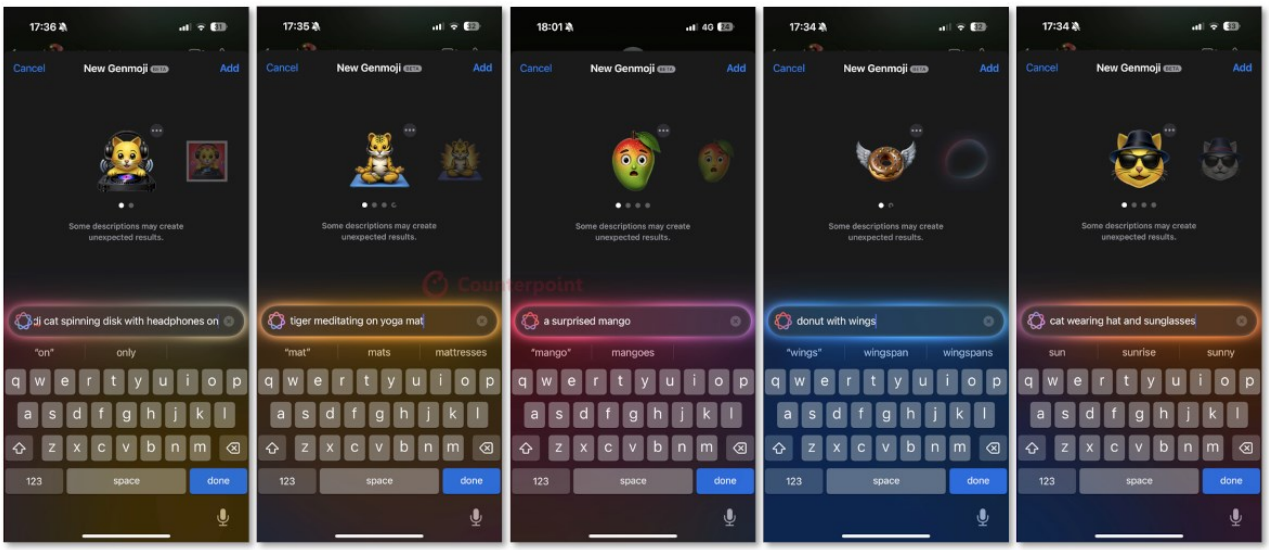
background”. Lastly, the AI also sometimes struggles with details and does not produce images like dedicated AI image-generation platforms.

Apple’s on-device processing ensures a good balance of speed and privacy, but it cannot generate more complex, photorealistic images like other AI image generators.

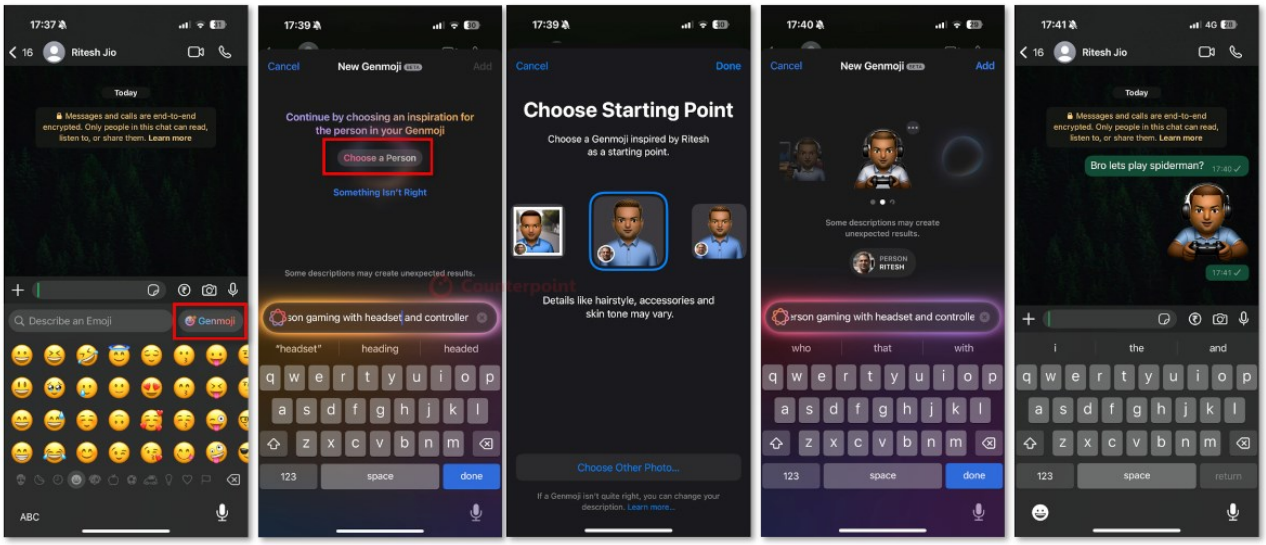
Genmoji: Create personalized emojis on the go

Emojis are one of the best ways to react and express your emotions in a conversation. With every iOS update, Apple keeps adding new emojis, but now in the generative AI era, personalization takes a step further with Genmoji. It allows you to create custom emojis based on your text descriptions. These are not simply modified versions of the existing emojis – they are entirely new creations.

From a “DJ cat wearing headphones and spinning disk” to “a donut with wings” to “tiger meditating on yoga mat” and “a surprised mango,” we tried a bunch of descriptions, and were able to create Genmoji with ease. The results were creative and accurate almost every time. Genmojis are created on-device.



You can also choose a photo from your camera gallery and create those personalized emojis with the person’s face. As Genmoji is integrated into the keyboard, it works across all apps, even on Meta apps like WhatsApp, Messenger, Instagram and more. To create one, head over to the text field in any app then tap on the emoji icon on the bottom left of the keyboard. Finally, select the Genmoji icon next to the search option.

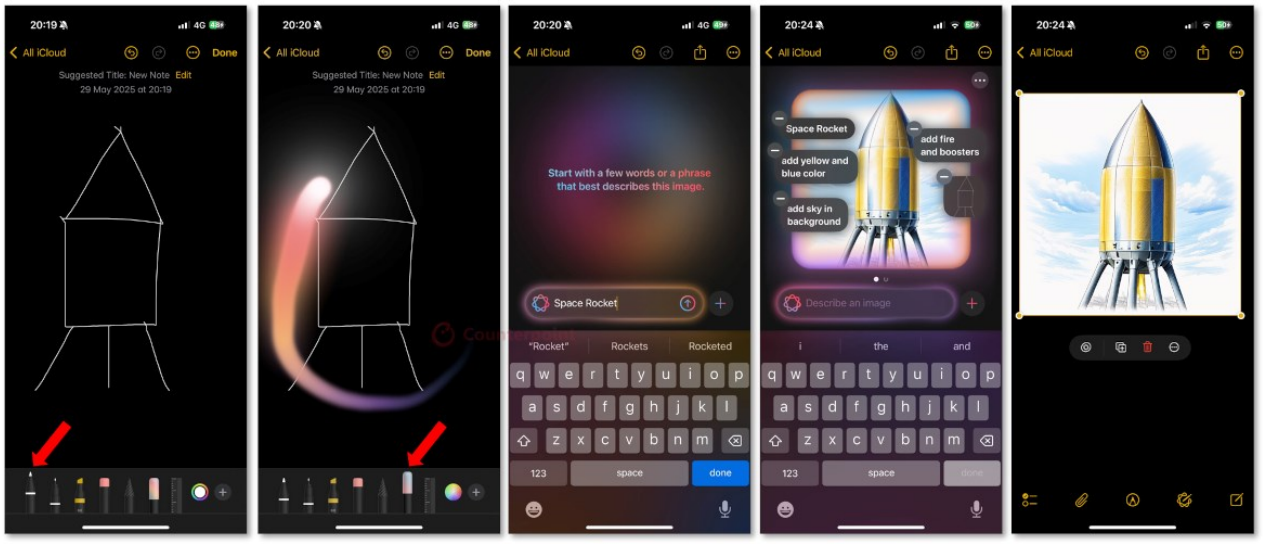


The ability to generate fun and creative emojis using Genmoji adds a unique touch to communication.

Image Wand: Turn your rough sketches into polished art

Powered by Apple Intelligence, Image Wand is a powerful tool that lets you transform your rough sketches into polished art within the Notes app. It works best with an iPad using the Apple Pencil but also works well on Apple Intelligence-compatible iPhones where you can scribble and draw rough sketches using your fingers.

To use Image Wand, head over to the Notes app **>** Tap on the Markup icon (pencil icon) **>** Select the Pen and then draw something. Once you are done scribbling, tap on the Image Wand icon (sixth from the left) **>** circle on your rough sketch and then describe your image. You can also circle with the Image Wand in an empty space and then describe your image.



Once the image is generated, you can add more prompts to add or remove something from the background. We created two images, one with a rough doodle of a rocket, and the other in an empty space with the prompt – “a cat and dog enjoying the rain.” We added more descriptions like “blue skies and sunshine” to the rocket image, and “river and mountains” to the cat and dog image. These generated images can be saved in your gallery app and then shared across other apps. Similar to Genmoji and Image Playground, the Image Wand also works on-device.

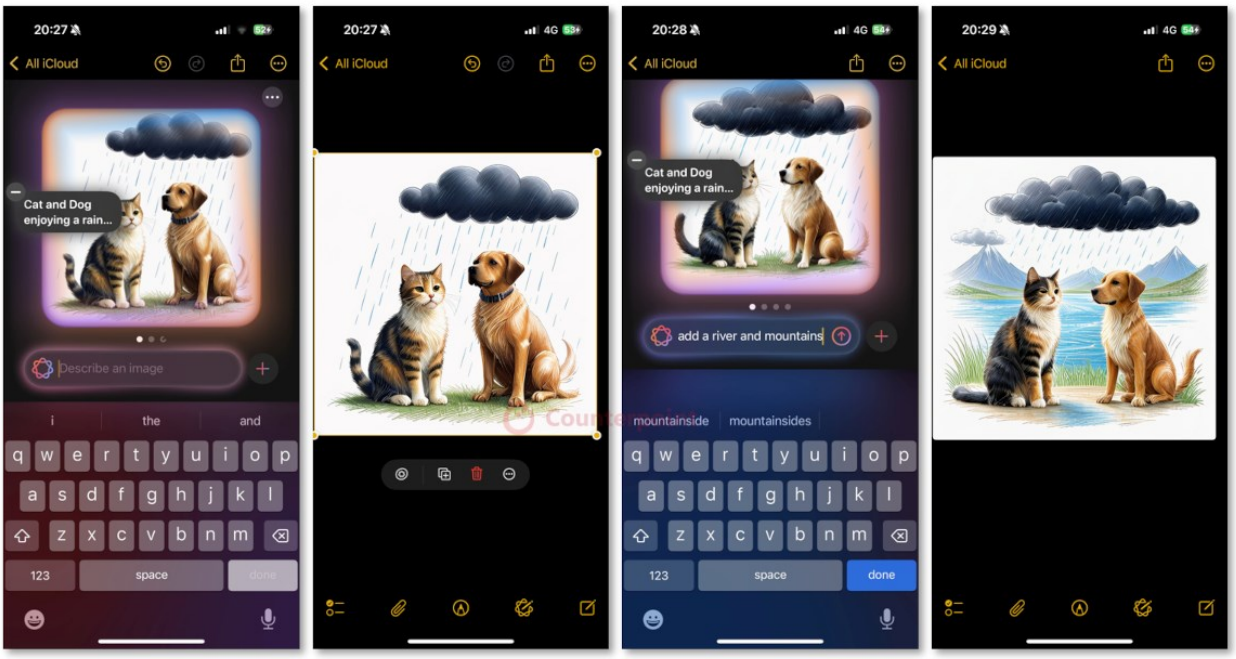


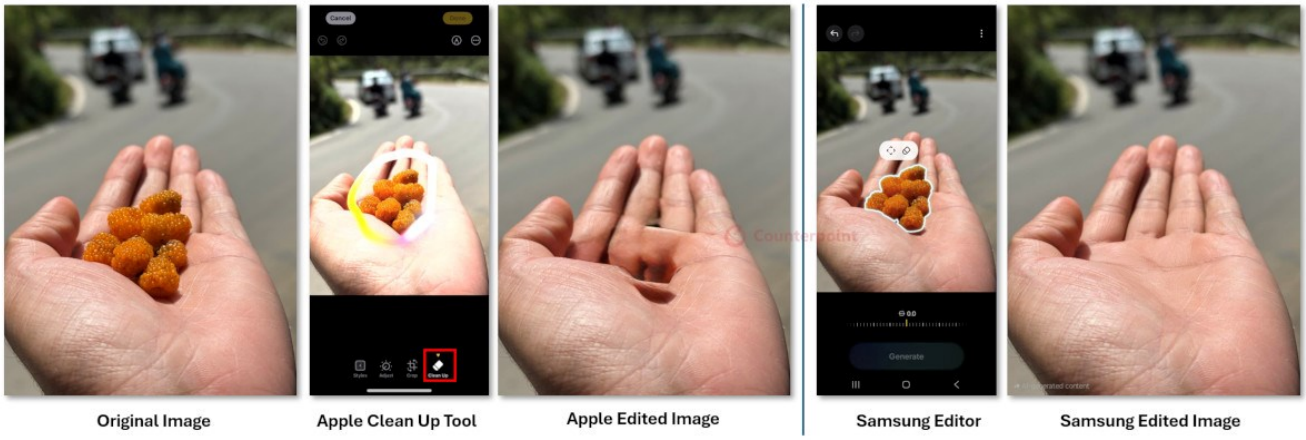
Image Wand is a good tool for visual thinkers to make their rough sketches more presentable.

Clean Up Tool: Removes distractions from your photos, but struggles with complex textures

From photobombers to unsightly trash, and more, the Clean Up tool aims to remove all those unwanted objects and distractions from your photos. It can also remove vehicles, lens flare and other random objects from your photos. Using generative AI, it can analyze the surroundings in a scene and intelligently generate new pixels to fill in the space from where the object is removed. The end result aims to make it look like the unwanted object never existed.

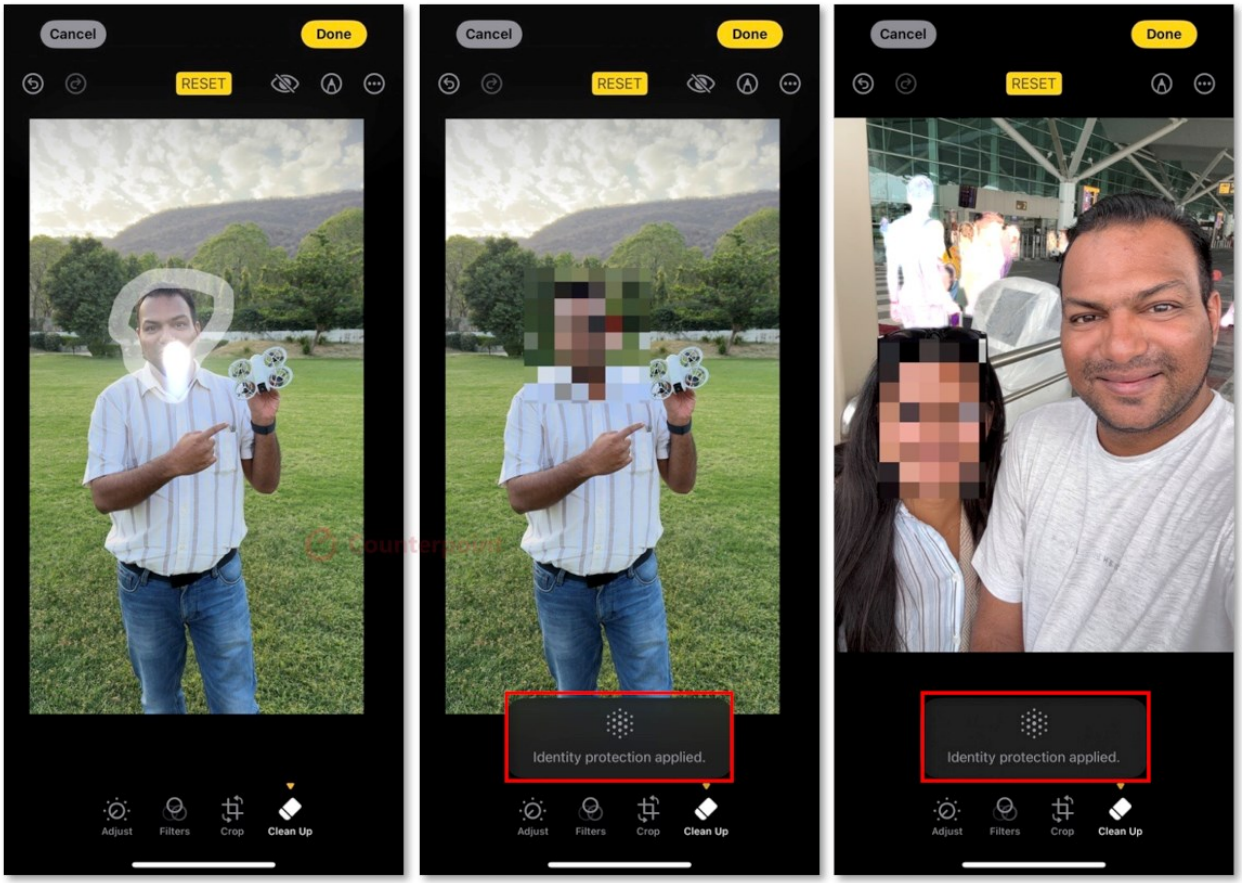
To use the tool, open the Photos app **>** select the photo you want to edit **>** tap on edit **>** Clean Up. The tool will then analyze the photo and suggest objects to remove. You can simply tap on them, or circle on the object you want to remove.

The Clean Up tool does a good job in removing some distractions with consistent background and textures neatly. However, it does struggle with complex backgrounds resulting in imperfect and blurry fills. This is an area where competitors Samsung, OPPO and others do a better job as they leverage hybrid cloud-based approach for complex generative fills, whereas Apple does it on-device.



Apple's Clean Up tool does a good job in most scenarios with on-device processing, but how it matches with cloud-based competitors processing remains to be seen.

For those concerned about privacy when sharing photos, the Clean Up tool also has a hidden superpower. Using the Clean Up tool and brush to circle over a person's face, Apple Intelligence will interpret your request to protect the identity of the person, and it will pixelate the face, instead of completely removing it. At the bottom, it will also prompt a message saying, "Identity protection applied".



Final Thoughts

- Image Playground and Genmoji showcase Apple's commitment to integrating AI-powered creativity to enhance the user experience.
- While Genmoji works across third-party apps as it is integrated into the keyboard, the potential for integrating Image Playground with third-party apps could further enhance its utility.
- Apple's commitment for on-device processing is good from a privacy and data security point of view, but the challenge will be to see how it can match or surpass cloud-based processing of competitor GenAI tools.
- At WWDC, all eyes will be on how Apple plans to further improve these GenAI apps to make them more reliable and with more feature additions.
- The implementation of creative features like Genmoji and Image Playground highlights the balancing act that Apple is trying to accomplish – enabling GenAI features, while remaining consistent with its promise to present an optimized user experience.
- To deliver on its brand promise, Apple is focusing on on-device AI features – allowing the company to control the user experience. However, the focus on on-device and privacy limits each feature. Other solutions can utilize multi-modal prompts and can generate content using more complex prompts.
- Apple is likely to introduce enhancements for its on-device Intelligence at the WWDC. The company is also likely to rely on additional partnerships or a tighter integration with existing partners (mainly OpenAI) to add flexibility and more advanced capabilities to its platform.
- A key advantage Apple has, thanks to its control over hardware and software, is the ability to integrate AI into the platform. Instead of users finding third-party apps and services, Apple blends them further to the iOS ecosystem by making them third-party compatible. It will be critical for Apple to continue this strategy by further fusing AI features across apps, while at the same time working to enhance its models to allow greater flexibility.

- Apple will also continue to rely on curated partners to fill specific capability gaps to remain level with the competition.

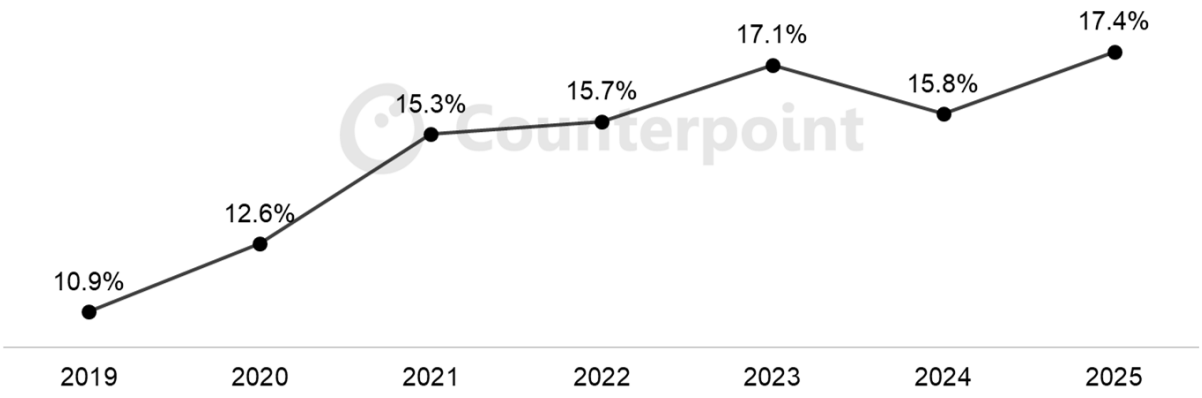
Global iPhone Sales Increase Double Digits in Apr-May, Driven by Growth in US and China

- *April and May iPhone sell-through grew 15% YoY to reach its highest level ever.*
- *Strong YoY increases in Japan, the Middle East and India were supported by a return to growth in China and the US, where tariff dodgers helped boost sales*
- *We see two key themes emerging for Q2 2025:*
    - *Growth driven by diverse markets*
    - *Breathing room for Apple as Agentic AI not impacting consumer purchasing decisions yet*

Seoul, Boston, Beijing, London, New Delhi, San Diego, San Jose, Taipei, Tokyo – June 16, 2025

According to preliminary data from Counterpoint Research's Market Pulse Global Monthly Smartphone Sales Report, iPhone sales grew a healthy 15% YoY in April and May, first two months of Q2 2025. This is Apple's highest market share for these two months combined post pandemic.

Apple iPhone Global Sell-Through Market Share (April + May), 2019 – 2025

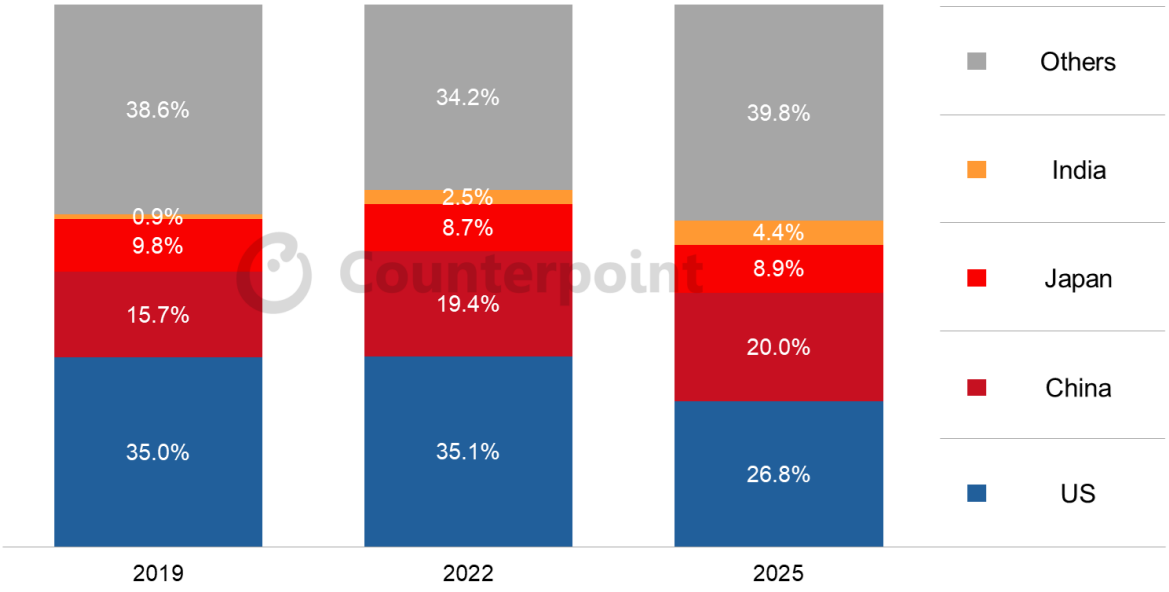


Source: Counterpoint Research Global Monthly Smartphone Sales Report

Regionally, Apple's largest two markets, USA and China were the key sales drivers during the period. Both US and China, returned to positive YoY growth after three years of declines in this less seasonal period. China was the bright spot with Apple capturing top spot in May — a notable turnaround after continued share losses and stiff competition from Huawei and others.

Healthy performance in Apple's two largest iPhone markets were supported with double-digit sales growth increases in Japan, India and affluent Middle Eastern markets.

April-May iPhone Sell-Through and YoY Growth by Region



Source: Counterpoint Research Global Monthly Smartphone Sales Report

“Q2 iPhone performance looks promising at the moment but as always swings either way are dictated by two markets - US and China,” says **Senior Analyst Ivan Lam**. “Looking at June numbers rolling in we’re asking two things: Have the last couple of months in the US been about consumer buying on tariff fears? And is there more runway left in China with the government subsidy push and attractive offers to catalyze iPhone sales?”. These are two trends which have actually gone in Apple’s favor to lift global iPhone demand.

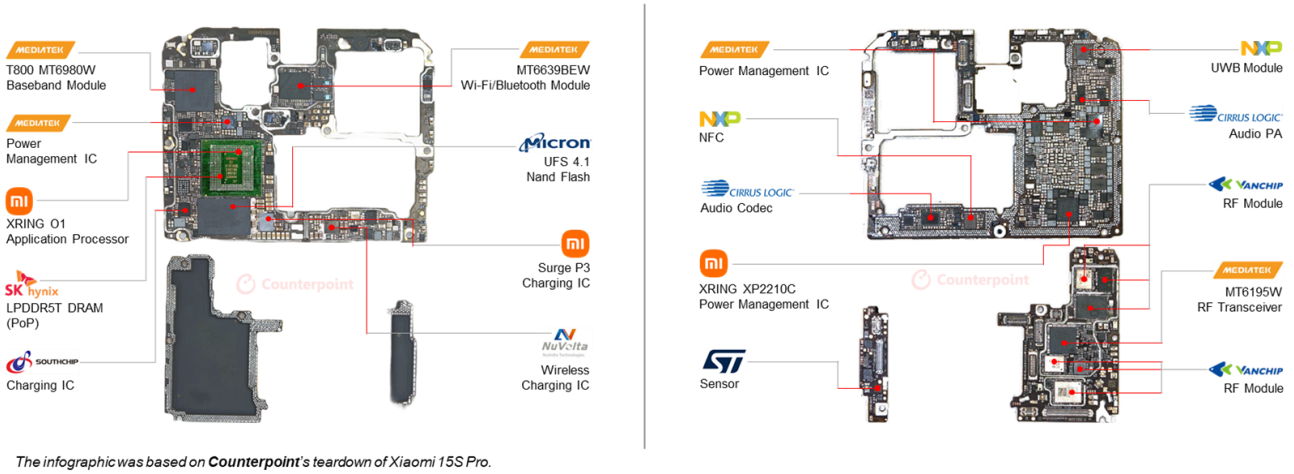
“Increasing US and especially Chinese demand, at this point in time, tells me the need for Agentic AI is not quite a factor yet in the decision process for most smartphone buyers – certainly not for those looking to upgrade an iPhone,” says **Jeff Fieldhack**. “So doing the math and taking in everything here at Apple WWDC this week, I’d say Apple’s bought some time to prepare and deliver something really special with Siri in coming iterations.”

Over the same period, Japan has seen a sharp increase in demand for iPhones.
“Japan’s seeing a resurgence of the iPhone this year and the compact iPhone 16e is proving extremely popular amongst Japanese consumers, building on the iPhone SE and popularity of smaller iPhones in previous years,” says Counterpoint’s Tokyo-based **senior analyst Yoko Miyashita**. “The new model launch has padded domestic growth numbers with its attractive entry price point offering Apple Intelligence and a minimalist form-factor appealing to Japanese tastes. Additionally, we’re also seeing very strong sales of base models for iPhone 16 and the older iPhone 14 in particular, with operator promotions creating strong demand.”

India continues to ramp with Apple focusing on the world’s most populous country as both manufacturing hub and end market. “The iPhone is the most aspirational tech product for tech-savvy consumers here. And iPhone growth continues to come from mature smartphone users entering into the iOS ecosystem as they look to upgrade to a more premium smartphone experience,” says **VP of research Neil Shah**. “The short-term impact is huge iPhone sales growth, but India is a longer-term growth story with Apple companion devices and especially services.”

Infographic: Smartphones | Xiaomi 15S Pro | Key IC Suppliers

Key IC Suppliers for Xiaomi 15S Pro



*The infographic was based on **Counterpoint**'s teardown of Xiaomi 15S Pro.*

Geekbench 6				PC Mark (work)	Antutu	3D Mark (Wild Life)	GPU Mark
Single Core	Multi Core	GPU (Open CL)	GPU (Vulcan)				
3010	9410	20609	22000	14731	2534564	21267	2530800

XRING O1 AP/SoC new, in-house designed 3nm processor.

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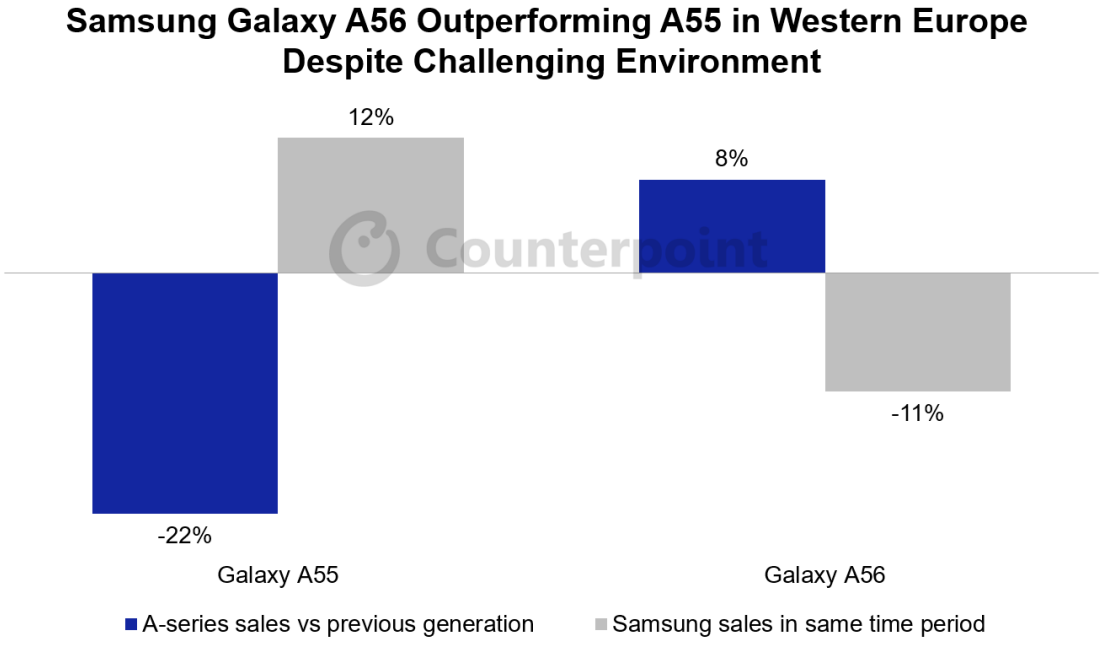
Galaxy A56 brings Welcome Boost to Samsung in Western Europe

- *In its first seven weeks of availability in Western Europe, the Samsung Galaxy A56's sales were up 12% on the previous-generation Galaxy A55. Samsung's overall smartphone sales declined 11% over the same period.*
- *Samsung is bringing more AI features to the mid-tier, and consumers are reacting positively.*
- *But competition in this segment is fierce, with the likes of the Google Pixel 9a and HONOR 400 offering an arguably more complete AI experience at a similar or even lower price point.*

London, Beijing, Berlin, Buenos Aires, Hong Kong, New Delhi, San Jose, Seoul, Taipei, Tokyo – July 1, 2025

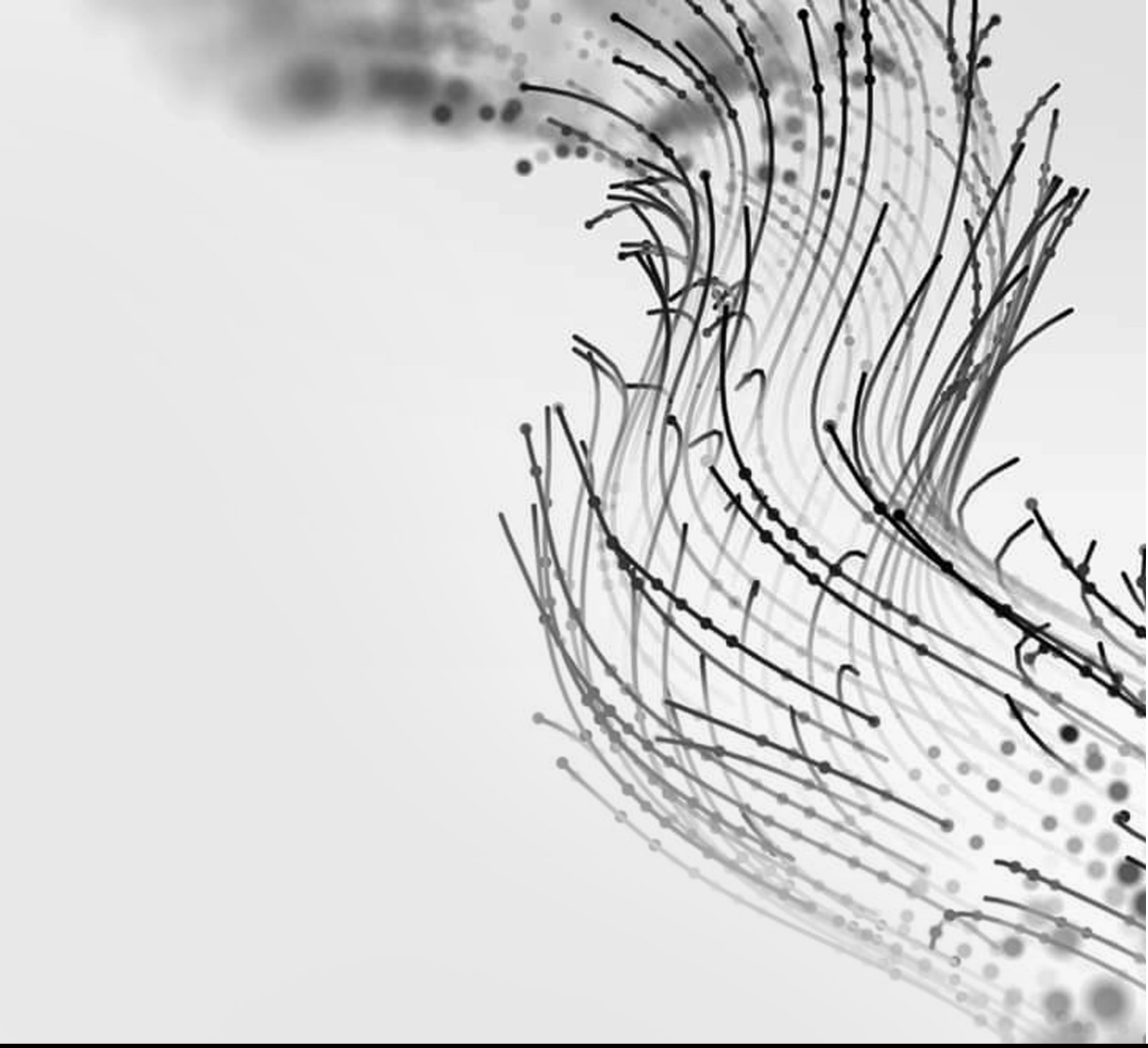
Samsung's Galaxy A56 smartphone model is off to a reasonable start in Western Europe, at least relative to last year's A55, according to **Counterpoint Research's Weekly Data**. In its first seven weeks of availability in Western Europe since its launch on March 19, 2025, sales of the Galaxy A56 were up 12% compared to the previous generation, the Galaxy A55. This is welcome news for Samsung, which has been struggling in the region recently – in the same period, Samsung's total smartphone sales declined by 11% while total sales in Western Europe declined by only 2%. For the Galaxy A55 last year, sales declined 22% compared to the A54, while Samsung's total sales increased by 8%.



Note: Time period = Seven weeks following launch

Source: Counterpoint Research

Associate Director Jan Stryjak said, "The Galaxy A56, along with the A36 and A26, is the first Samsung A-series smartphone launched with Galaxy AI built in. Samsung is bringing more AI features to the mid-tier, and that seems to have struck a chord with consumers. Although Samsung's overall smartphone sales are down, the A56 is doing better than the A55 did last year. However, competition in this segment is fierce, with the likes of the Google Pixel 9a and HONOR 400 offering an arguably more complete AI experience at a similar or even lower price point."



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Hong Kong | USA | Los Angeles | South Korea | Seoul | Landen | Beijing |

Mumbai | Boston | Jakarta | Taipei | Delhi

Contact Us:

www.counterpointresearch.com

info@counterpointresearch.com

@CounterPointTR