

# Smartphone Need-To-Know – August 2025

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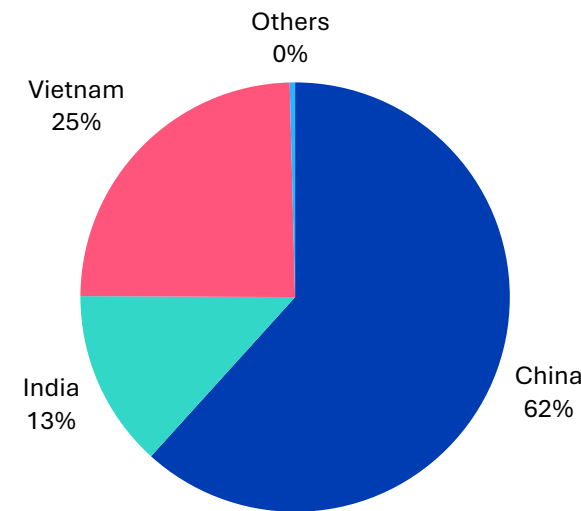
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# India emerges as the largest manufacturing base for US smartphones, as vendors react to uncertainty over ever-changing tariffs

- The uncertain outcome of negotiations with China has accelerated supply chain reorientation. The share of US smartphone shipments assembled in China shrank from 61% in 2Q24 to 25% in 2Q25. Most of this decline has been picked up by India; the total volume of “Made-in-India” smartphones grew 240% year-on-year and now accounts for 44% of smartphones imported into the US, up from only 13% of smartphone shipments in 2Q24.
- Apple is the largest smartphone vendor in the US and has been investing in its production capacity in India over the last few years as part of its China Plus One strategy. This has allowed it to rapidly shift production of smartphones intended for the US market to India.
- Samsung and Motorola have also increased their share of US-targeted supply from India, although their shifts are significantly slower and smaller in scale than Apple’s. Motorola, similar to Apple, has its core manufacturing hub in China, whereas Samsung mainly produces smartphones in Vietnam.
- All this has occurred while smartphones are currently exempt from the retaliatory tariffs imposed by Donald Trump. Even if smartphones remain exempt, so many other categories are impacted that consumer spending patterns and smartphone demand will both be hit.

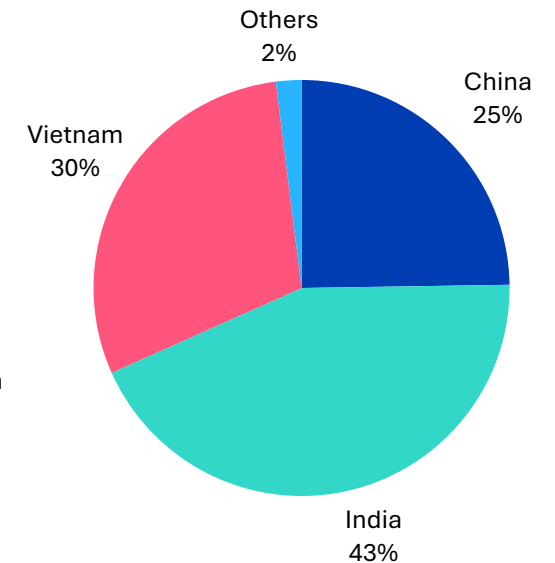
**Manufacturing country of US smartphone shipments**

**2Q24**



Source: Omdia

**2Q25**



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“Apple has scaled up production capacity in India over the last few years as part of its China Plus One strategy and has opted to dedicate most of its export capacity in India to supply the US market so far in 2025. While Apple is still dependent on China for Pro model production for the US, it will be considering how it could shift entirely to India for the upcoming iPhone 17 series.”

**Sanyam Chaurasia**

Principal Analyst for Smartphone Research at  
Canalys (now part of Omdia)

# Google launches the Pixel 10 series, including the Pixel 10 Pro Fold, with IP68 water and dust resistance

- At the star-studded Made By Google event hosted by Jimmy Fallon on August 20, 2025, the newest Pixel 10 series smartphones were announced, including the Pixel 10, Pixel 10 Pro, Pixel 10 Pro XL, and Pixel 10 Pro Fold.
- A major part of the announcement was the latest Tensor G5 chipset on all four devices. While the Snapdragon 8 Elite has more power on paper, Google’s aim with this custom-designed processor is optimization and AI. It will enable the latest Gemini Nano model to run fully on-device on all its new phones.
- The Pixel 10 series is also the first major Android phone lineup to use Qi2 wireless charging—by incorporating magnets, the phone aligns and snaps into place. As such, Google is also launching new magnetic accessories, including MagSafe accessories for the new phones.
- The Pixel 10 Pro Fold has an unfolded thickness of 5.2mm, making it 1mm thicker than the recently launched Samsung Galaxy Z Fold7. However, the Pixel is IP68 rated compared to Samsung’s IP48.
- Also announced at the event were the Pixel Watch 4 and Pixel Buds 2a. The Pixel Buds Pro 2, which were launched last year, are also being updated in the new Moonstone color to match the latest Pixel phones.

Four Google Pixel 10 series smartphones are shown side-by-side: Pixel 10 (blue), Pixel 10 Pro (light green), Pixel 10 Pro XL (black), and Pixel 10 Pro Fold (dark grey).

Model	Pixel 10	Pixel 10 Pro	Pixel 10 Pro XL	Pixel 10 Pro Fold
Main display	6.3” Actua display	6.3” Super Actua	6.8” Super Actua	6.4” Actua display
	1080x2424	1280x2856	1344x2992	1080x2364
Secondary display	3000 peak nits	3300 peak nits	3300 peak nits	3000 peak nits
				8.0” Super Actua
RAM and storage				2076x2152
				3000 peak nits
Main camera	12 GB RAM	16 GB RAM	16 GB RAM	16 GB RAM
	128 / 256 GB ROM	128GB-1TB ROM	256GB-1TB ROM	256GB-1TB ROM
Secondary camera	48x13x10.8MP	50x48x48MP	50x48x48MP	48x10.5x10.8MP
	5x zoom	5x zoom	5x zoom	5x zoom
Battery (mAh)	10.5MP	42MP	42MP	10MP
	4970	4870	5200	5015
Weight	204g	207g	232g	258g
Launch starting price				

Source: Omdia

Image source: Google

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“One big announcement that Google slipped under-the-radar of its star-studded Pixel 10 phone announcement was it will be eSIM only in the US. This mirrors the same decision Apple made for iPhones in the US from the iPhone 14 series in 2022. This move from Google will likely add fuel to the growing shift towards eSIM globally.”

**Aaron West**

Senior Analyst

Consumer Devices

# Apple and Samsung announce increased investments into US manufacturing, R&D, and end-to-end silicon supply chain

- Earlier this month, Apple announced its American Manufacturing Program, with Apple CEO Tim Cook presenting Donald Trump with the commitment in the Oval Office. This program will expand its \$500bn spending commitment made earlier this year by another \$100bn and will mean hiring 20,000 people in the US across its R&D, silicon engineering, software development, AI, and machine learning departments.
- The biggest claim from the program on smartphone manufacturing is end-to-end silicon supply chain in the US—including partners in every aspect of silicon production, from R&D to fabrication and packaging. This includes the expectation of 19 billion chips in 2025, primarily from TSMC's Arizona plant.
- Following this, ahead of the South Korea-USA summit, Samsung announced increased investment in US chip manufacturing from \$37bn to \$44bn. This is largely aimed at advanced chip packaging, with plans to produce 2nm and 4nm chips to meet demand from new clients such as Apple and Tesla.
- This fresh investment from Apple and Samsung could be a way to appease Donald Trump's demand for more manufacturing in the US, to de-escalate and avoiding tariffs.

## Apple's American manufacturing program



All iPhone and Apple Watch cover glass will be produced in the U.S.

American-made rare earth magnets from MP Materials



Creating an end-to-end silicon supply chain in America



Source: Apple

“With this new investment, it appears Samsung plans to outperform the competition in the US by offering a complete manufacturing solution, including chip production, chip packaging, and memory chip manufacturing. This would outmaneuver TSMC, which only offers chip manufacturing and packaging, and SK Hynix, which only makes memory chips in the US.”

**Jusy Hong**

Senior Research Manager

Consumer Devices



# Deutsche Telekom launches low-cost AI phone in partnership with Perplexity

- To increase smartphone AI accessibility and adoption, Deutsche Telekom announced the T Phone 3 in partnership with Perplexity AI.
- Through Perplexity Assistant, it's claimed the T Phone 3 will support functions including real-time translation, trip planning, tutoring, email drafting, content summarization, and image editing—all features currently seen on premium flagship smartphones that utilize the latest chipsets to enable on-device AI.
- In its key market of Germany, the T Phone 3 is available from €149 with bundle offers reducing this to just €1 each when purchased alongside a tariff. An 18-month subscription to Perplexity Pro is included in the purchase. Prices vary across the other nine launch markets, including Austria, Croatia, Czechia, Greece, and Hungary.
- A Pro version of the T Phone 3 is currently scheduled to launch later this year.
- Deutsche Telekom also announced the T Tablet 2 with Perplexity AI features, which starts at €199, with the same €1 bundle deal.

## Deutsche Telekom's AI phone, the T Phone 3



Source: Deutsche Telekom

“Deutsche Telekom’s claims over the AI capabilities of its new phone and tablet seem very ambitious. While the devices are labeled as AI-capable, in reality, this is likely to be entirely cloud-based AI, relying on Perplexity AI models running on AWS servers. The €1 bundle cost, along with 18-months of Perplexity Pro (which costs \$20 per month currently) also suggests this may be a loss-making project for both DT and Perplexity.”

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# Appendix

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# Appendix

## **Omdia Consulting**

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help you. For more information about Omdia's consulting capabilities, please contact us directly at [consulting@omdia.com](mailto:consulting@omdia.com).

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