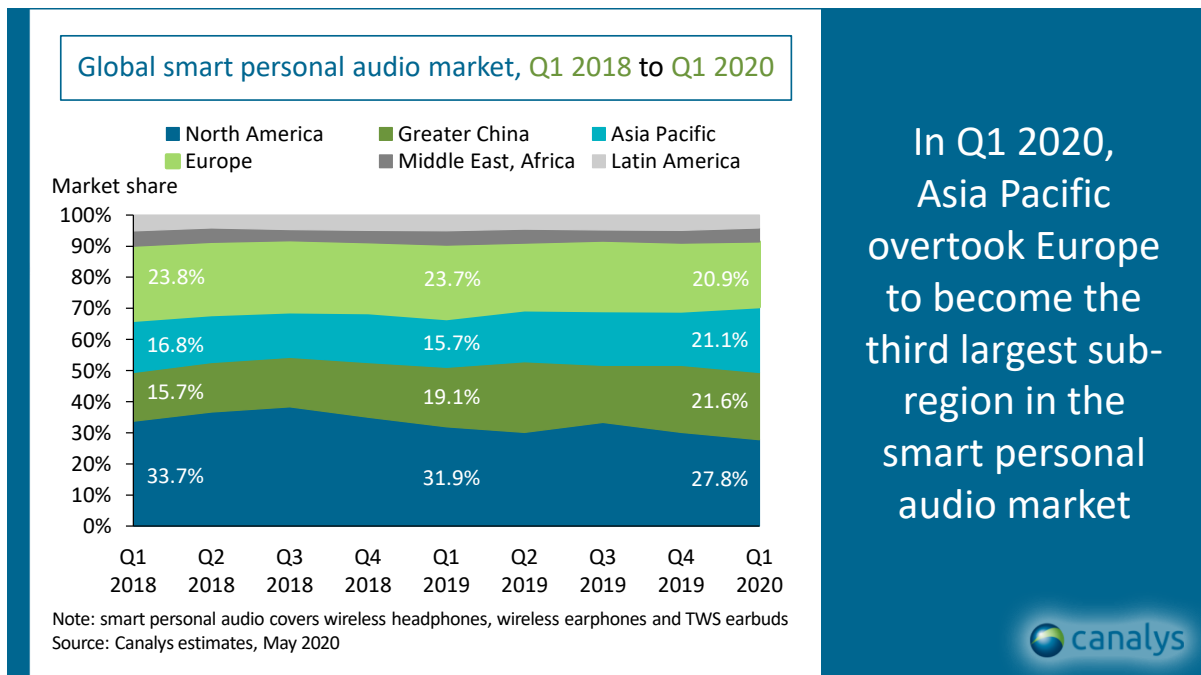


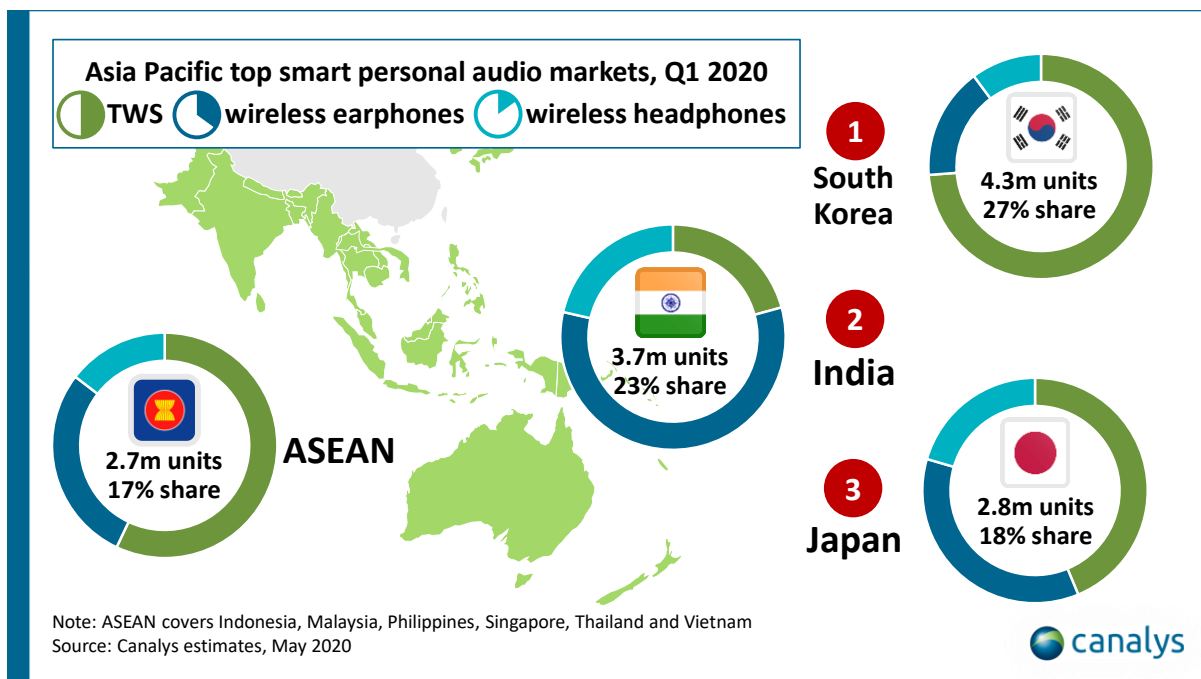
# Canalys: Smart personal audio device shipments up 61% in APAC in Q1 2020, thanks to smartphone vendors

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 15 July 2020

According to the latest Canalys estimates, shipments of smart personal audio devices in Asia Pacific, not including Greater China, grew 61% year on year to reach 16.0 million units in Q1 2020. Accounting for 21.1% of global shipments, Asia Pacific overtook Europe to become the third largest sub-region, after North America and Greater China. Asia Pacific is unique due to its dynamic market landscape, with each country presenting vendors with different opportunities. South Korea, India and Japan are the top three markets in Asia Pacific, and all three ranked in the top five globally in terms of shipment numbers in Q1 2020.




South Korea, the largest smart personal audio market in Asia Pacific, also leads in terms of TWS shipments. “In Q1 2020, 74% of smart personal audio devices shipped in South Korea were TWS earbuds, which translates to a total of 3.2 million units,” said Canalys Research Analyst Cynthia Chen. “TWS earbuds from Samsung and Apple, which focus on ease of use and sound quality, appeal to the needs of premium smartphone users in the country. The release of Samsung’s flagship Galaxy Buds+ in Q1 helped propel Samsung to the top in South Korea.”



India, currently one of the hottest battlefields for smartphone vendors, saw players start shifting to TWS as the category share hit 20%. “Accounting for more than half the market, wireless earphones are the most popular category in India, with all the top five players, including smartphone vendors Samsung, Realme and Xiaomi, shipping more wireless earphones than any other category in Q1,” said Canalys Analyst Madhumita Chaudhary. “Wireless earphones resonate better with local consumers as they are typically cheaper and are generally more reliable than bargain TWS devices. But Canalys expects the TWS category will gain traction as consumers start to see the convenience of TWS earbuds, while smartphone vendors continue to put emphasis on the category, especially brands such as Realme and Xiaomi, focusing on improving the availability and accessibility of TWS devices.”

## India: Top smart personal audio vendors Q1 2020

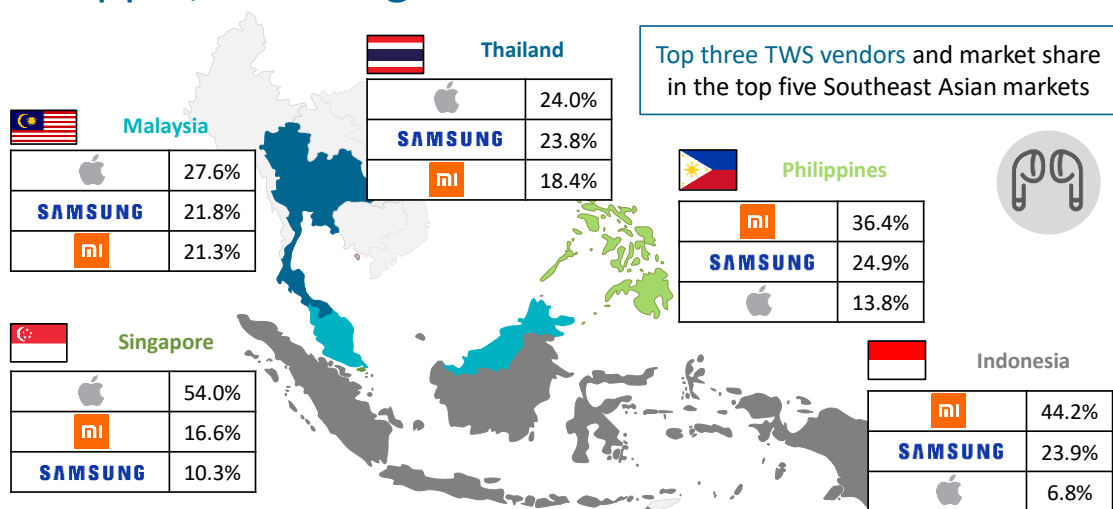


	Vendor	Unit share	Annual growth
#1	boat	20%	+168%
#2	SAMSUNG	19%	+32%
#3	realme	10%	-
#4	SONY	6%	+66%
#5	小米 xiaomi.com	6%	+316%

Note: smart personal audio covers wireless headphones, wireless earphones and TWS earbuds  
Source: Canalys estimates, May 2020

Southeast Asian countries are quickly becoming prime targets for smartphone vendors as TWS growth outpaced other categories in the first quarter of 2020. “Apple holds a leading position in Singapore and Thailand, the two largest TWS markets in Southeast Asia,” said Canalys Analyst Matthew Xie. “Three key vendors, Apple, Samsung and Xiaomi, dominate in the top Southeast Asian markets, with each offering products in distinct price bands, from entry-level to high-end.”

## Apple, Samsung and Xiaomi dominate ASEAN



Source: Canalys estimates, Smart Personal Audio Analysis, May 2020

In 2020, Canalys forecasts 23.6% growth in shipments in Asia Pacific, with TWS the main driver, resulting in the category accounting for 44% of the 76 million smart personal audio devices shipping in the region.

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