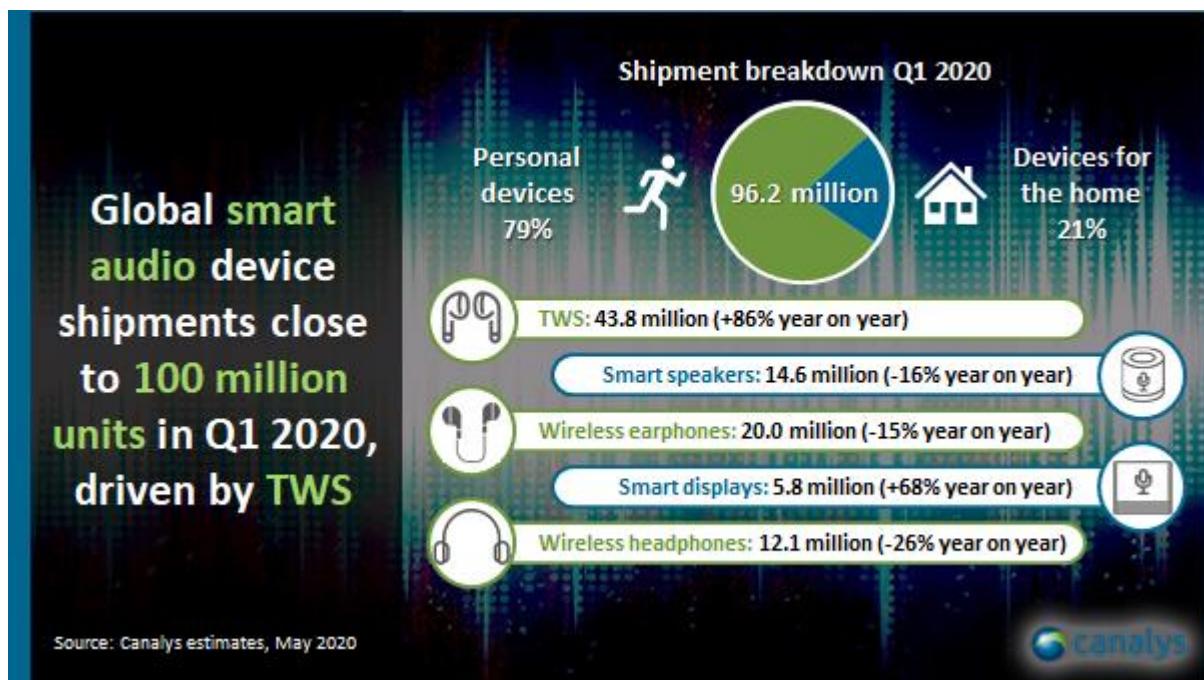


# Canalys: TWS shipments to exceed 200 million in 2020

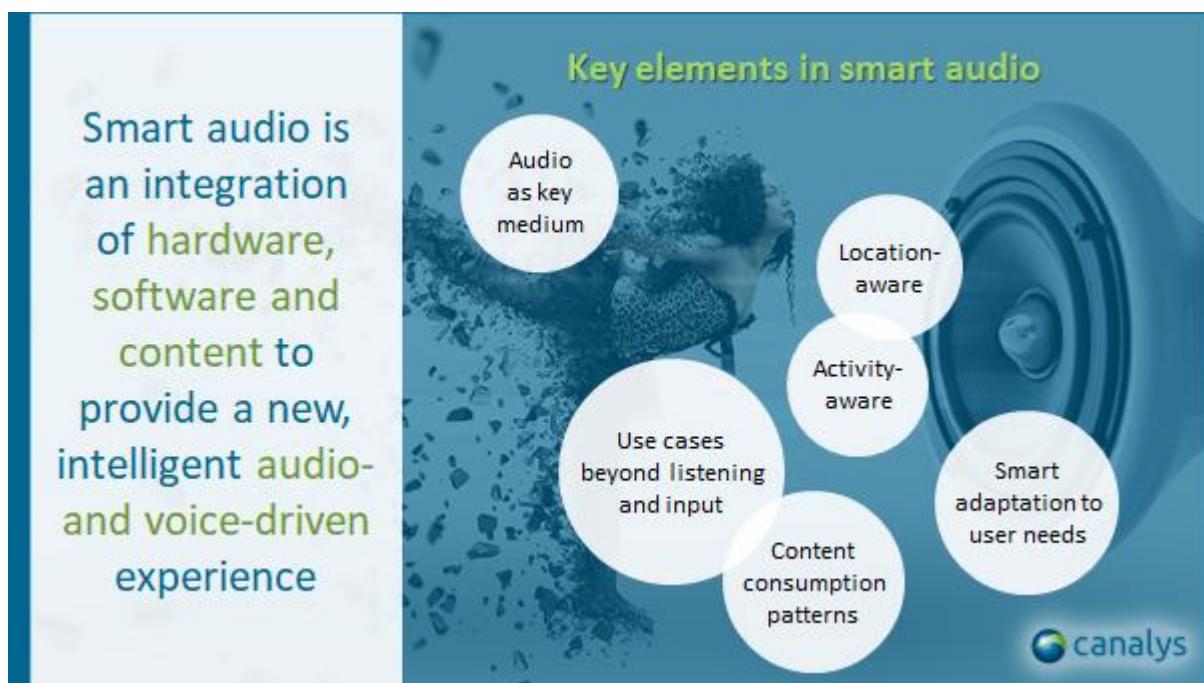
Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Thursday, 18 June 2020

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According to the latest Canalys estimates, worldwide shipments of smart audio devices, including smart speakers and smart personal audio devices, reached 96.2 million units in Q1 2020. The coronavirus pandemic caused the smart speaker category to suffer its first global decline, falling 1.9% as vendors shipped 20.3 million units. In contrast, smart personal audio was more resilient, with shipments up 19.4% at 75.9 million units. This strong growth was driven by smartphone vendors Apple, Samsung, Xiaomi and others, as well as audio brands that pivoted to the true wireless stereo (TWS) category more aggressively in the quarter. In Q1 2020, TWS held a 38% market share, making it the largest smart audio device category. The robust momentum behind TWS is expected to continue as vendors double down on the growing opportunity.



Smartphone vendors Apple, Samsung and Xiaomi led the TWS market in Q1 2020. "It is no surprise that smartphone vendors have been quick to dominate," said Canalys Research Analyst Cynthia Chen. "Market leader Apple maintained its strong momentum. It did especially well with its noise-cancelling AirPods Pro, shipping 5.5 million in Q1. Samsung gained a boost with the release of its Galaxy Buds+, which saw improvements in sound quality and battery life. While Chinese players such as Redmi and QCY use their supply chain prowess to dominate the budget entry-level segment, Huawei stood out with its high US\$151 average selling price. This was higher than Samsung's US\$145, due to the strong push behind Huawei's flagship FreeBuds 3."



Audio, one of the key aspects of the modern digital user experience, attracted new development as the streaming audio market saw a new boom. "Better sound quality is not the only improvement expected in smart audio devices," said Canalys Senior Analyst Jason Low. "With TWS, vendors aim to make it easier for users to consume content, as well as streamline access to smart assistants. Through tightly knitted integration with smart devices, such as smartphones, TWS devices are expected to become smarter, allowing users to work, exercise, learn, relax and be entertained more effectively." According to Canalys forecasts, TWS is expected to grow 29% in 2020, with shipments passing 200 million units. Devices are expected to gain longer battery life, further miniaturization, better comfort and improved features, such as active noise-cancellation covering a wider frequency range.

**Worldwide TWS shipments and annual growth**

Brands	Q1 2020 shipments (million)	Q1 2020 Market share	Q1 2019 shipments (million)	Q1 2019 Market share	Annual growth
Apple	18.1	41.4%	11.3	48.1%	+60%
Samsung	4.5	10.3%	3.4	14.6%	+30%
Redmi	3.1	7.0%	0.0	0.0%	-
QCY	2.5	5.6%	0.9	3.9%	+172%
Huawei	2.0	4.5%	0.5	2.3%	+261%
Others	13.7	31.2%	7.3	31.1%	+86%
<b>Total</b>	<b>43.8</b>	<b>100.0%</b>	<b>23.6</b>	<b>100.0%</b>	<b>+86%</b>

Note: percentages may not add up to 100% due to rounding

Source: Canalys Smart Personal Audio Analysis (sell-in shipments), May 2020

"The COVID-19 pandemic has provided an unexpected accelerator for the market, driving both the creation and consumption of audio and visual media. This in turn benefits the growth of smart audio devices as users seek new and better ways to consume content," said Low.

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## About Canalys

Canalys is an independent analyst company that strives to guide clients on the future of the technology industry and to think beyond the business models of the past. We deliver smart market insights to IT, channel and service provider professionals around the world. We stake our reputation on the quality of our data, our innovative use of technology and our high level of customer service.

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