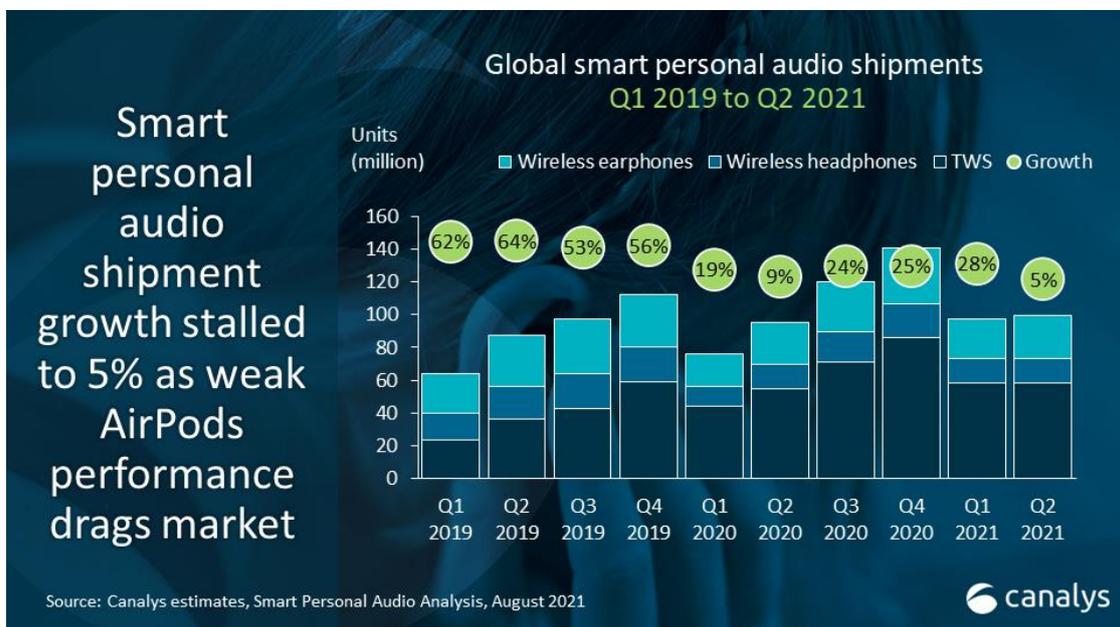


Global TWS market records lowest growth in three years at 6.4% in Q2 2021

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Friday, 3 September 2021

After strong double digit shipment growth in the past quarters, TWS shipments seem to be reaching a peak, with growth at 6.4%, reaching 58.3 million units shipped in Q2 2021, the lowest figure in three years. The global smart personal audio market grew 4.7% overall as shipments reached 99.8 million units in Q2 2021. Apple, the leader in the smart personal audio market saw its first decline ever showing clear signs of a slowdown. Shipments of AirPods TWS devices fell 25.7% to reach 15.0 million units in Q2 2021, contributing to the slower than usual growth of the overall TWS market this quarter.



Apple still retains its lead in the TWS category, but the decline of AirPods shipments resulted in Apple’s market share dipping below 30% in Q2 2021. “Apple’s steep decline is partly due to a hard comparison to a stronger quarter last year,” said Canalys Research manager Jason Low. “Despite the ups and downs, Apple’s key advantage is clear – it has a user ecosystem that is heavily faithful to its products, and it is one of the few smart device vendors that has stronger leverage over

content, which it can combine with its audio hardware to create unique experiences. The release of new AirPods in the second half of the year will prop the category up again, but the growing saturation of its iOS and macOS installed base could be a cause of worry.”

Worldwide TWS shipments and growth Q2 2021

Vendor	Q2 2021 shipments (million)	Q2 2021 Market share	Q2 2020 shipments (million)	Q2 2020 Market share	Annual growth
Apple (incl. Beats)	15.5	26.5%	20.8	38.0%	-25.8%
Xiaomi	5.3	9.1%	5.0	9.2%	5.7%
Samsung (incl. Harman subsidiaries)	5.2	8.8%	3.7	6.7%	40.5%
Skullcandy	4.1	7.0%	1.1	1.9%	285.4%
QCY	2.5	4.2%	2.9	5.4%	-15.8%
Others	25.9	44.3%	21.3	38.8%	21.3%
Total	58.3	100.0%	54.9	100.0%	6.4%

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

Source: Canalys Smart Personal Audio Analysis (sell-in shipments), August 2021

Xiaomi took second place in the TWS market, reclaiming its spot from Samsung with respective shipments at 5.3 million and 5.2 million units. Speaking about the neck-and-neck competition, Canalys Research Analyst Cynthia Chen said, “Since late 2019, the two have been evenly matched. While Xiaomi has definitely moved up the value chain, offering more premium TWS products, Samsung is catching up by bolstering both self-branded and sub-branded TWS offerings especially with JBL under the Harman subsidiary.”

Skullcandy’s market share reached a record high of 7%, pushing it into fourth place for the first time. “Skullcandy’s success came from its aggressive pivot to an affordable and cheerful TWS lineup such as Dime, Jib and Sesh targeting a younger demographic than Samsung or Apple. Partnering with Bragi, Skullcandy claims to offer a better handsfree experience, but it will be crucial to ensure the user experience lives up to expectations, and not marketing hype,” added Low.

Wireless headphones and wireless earphones, the other two categories that make up the smart personal audio market, grew 3.0% and 2.1% reaching 15.0 million and 26.5 million units respectively.

For more information, please contact:

Canalys China

Cynthia Chen: cynthia_chen@canalys.com +86 158 2151 8439

Jason Low: jason_low@canalys.com +86 159 2128 2971

Canalys India

Rushabh Doshi: rushabh_doshi@canalys.com +91 99728 54174

Sanyam Chaurasia: sanyam_chaurasia@canalys.com +91 89820 33054

Canalys Singapore

Le Xuan Chiew: lexuan_chiew@canalys.com +65 9655 6264

Ishan Dutt: ishan_dutt@canalys.com +65 8399 0487

Canalys UK

Ben Stanton: ben_stanton@canalys.com +44 7824 114 350

Runar Bjørhovde: runar_bjorhovde@canalys.com +44 7787 290 115

Canalys USA

Marcy Ryan: marcy_ryan@canalys.com +1 650 862 4299

Brian Lynch: brian_lynch@canalys.com +1 650 927 5489

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