



The Key Smartphone Trends You Need to Know

<< April 2026 >>



US Smartphone Sell-Through Share by Brand
Q1 2019 – Q4 2025

— Apple — Samsung — LG — Motorola — TCL — Google — HMD

Market Share in Percentage

Apple Leads

Samsung Leads Android

Motorola gains from smaller OEMs

Google in postpaid only

TCL losing ground in sub \$200

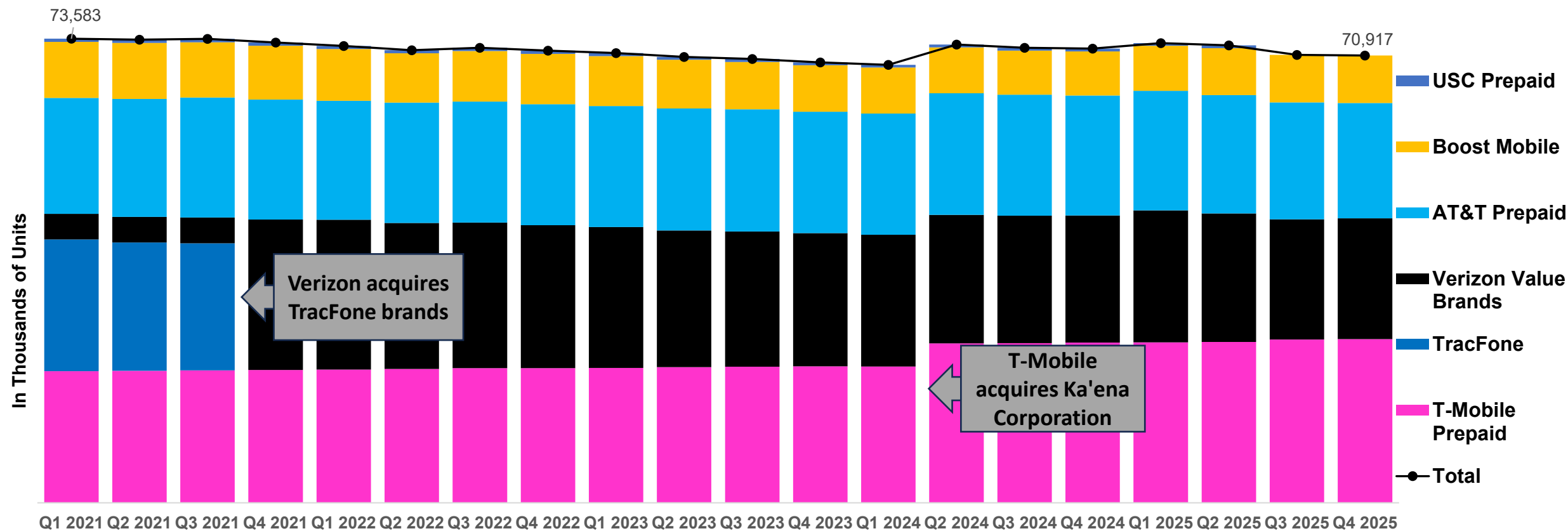
HMD exits in 2025

Q1 2019 Counterpoint Research USA Channel Share Tracker

Q4 2025

The traditional prepaid market is not growing

US Prepaid Subscribers by Major Carriers Q1 2021 – Q2 2025

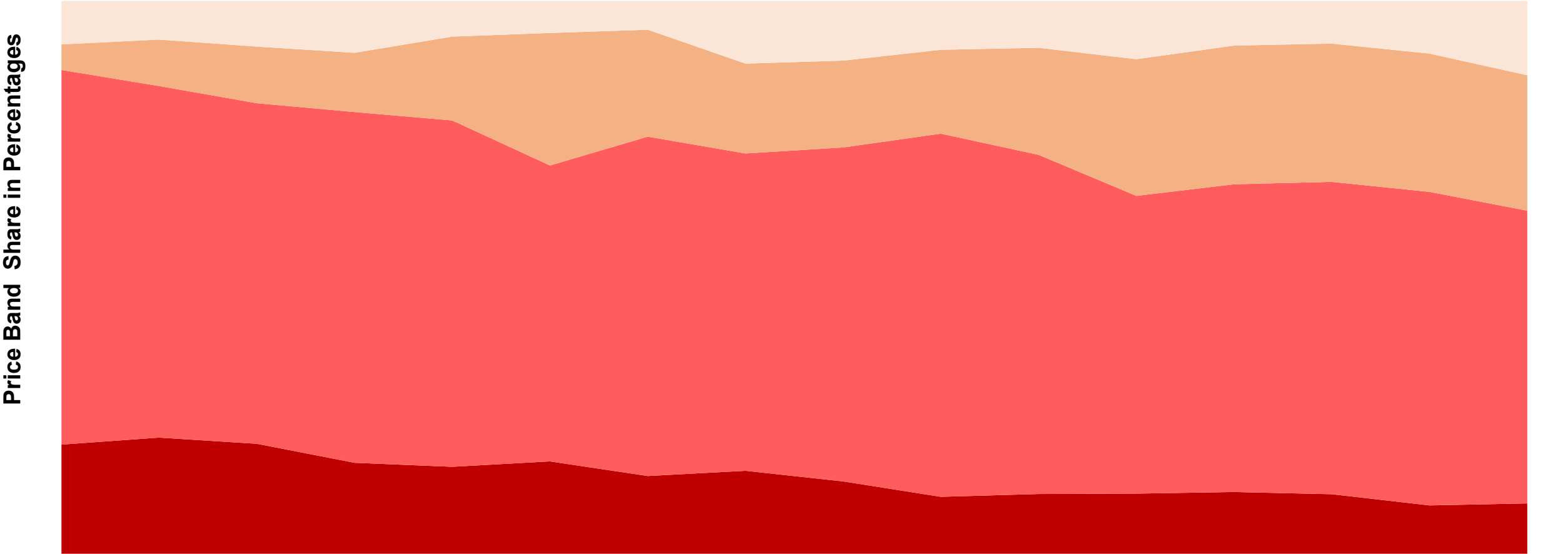


Note:

- 1. Verizon Value Brands includes Verizon Prepaid, TracFone, Straight Talk, Visible, Total by Verizon, Net10, GoSmart Mobile, PagePlus, Safelink, etc.
- 2. AT&T Prepaid includes AT&T Prepaid and Cricket Wireless
- 3. T-Mobile Prepaid includes Metro by T-Mobile, T-Mobile Prepaid, Mint Mobile and Ultra Mobile
- 4. Boost Mobile includes Gen Mobile, Republic Wireless, Ting

US Prepaid Smartphone Sell-Through Share by Price-Band
Q1 2022 – Q4 2025

<\$100 \$100-\$299 \$300-\$599 \$600+



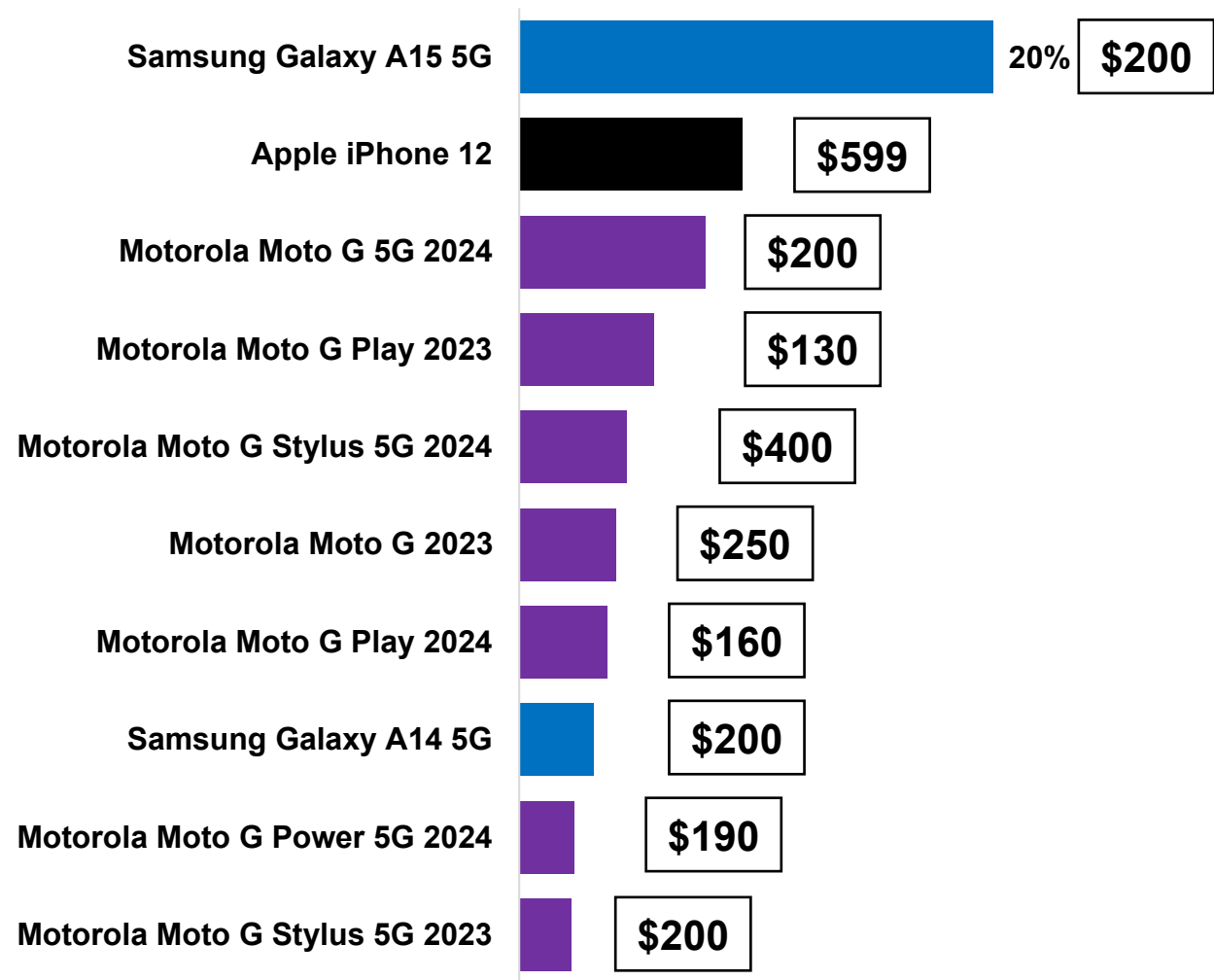
Brand Share by Prepaid Channel – 2024



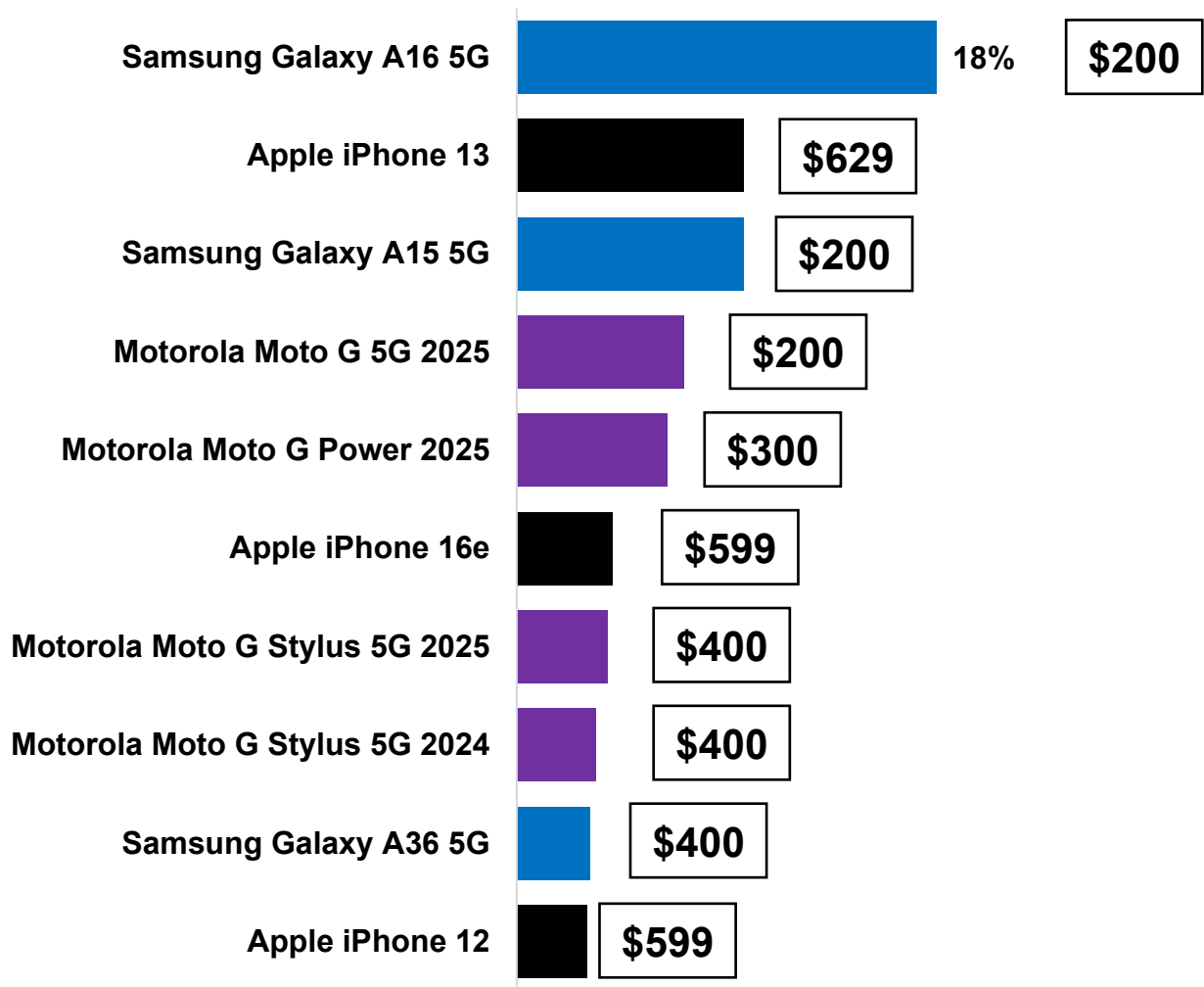
Brand Share by Prepaid Channel – 2025



Prepaid Bestsellers – 2024

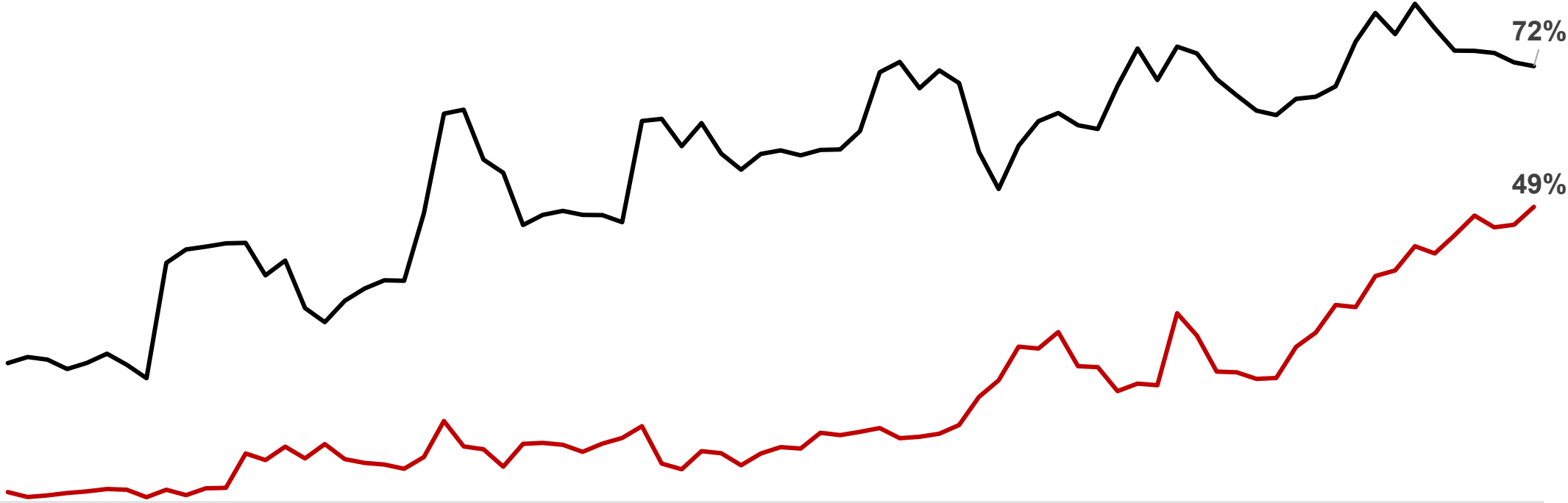


Prepaid Bestsellers – 2025

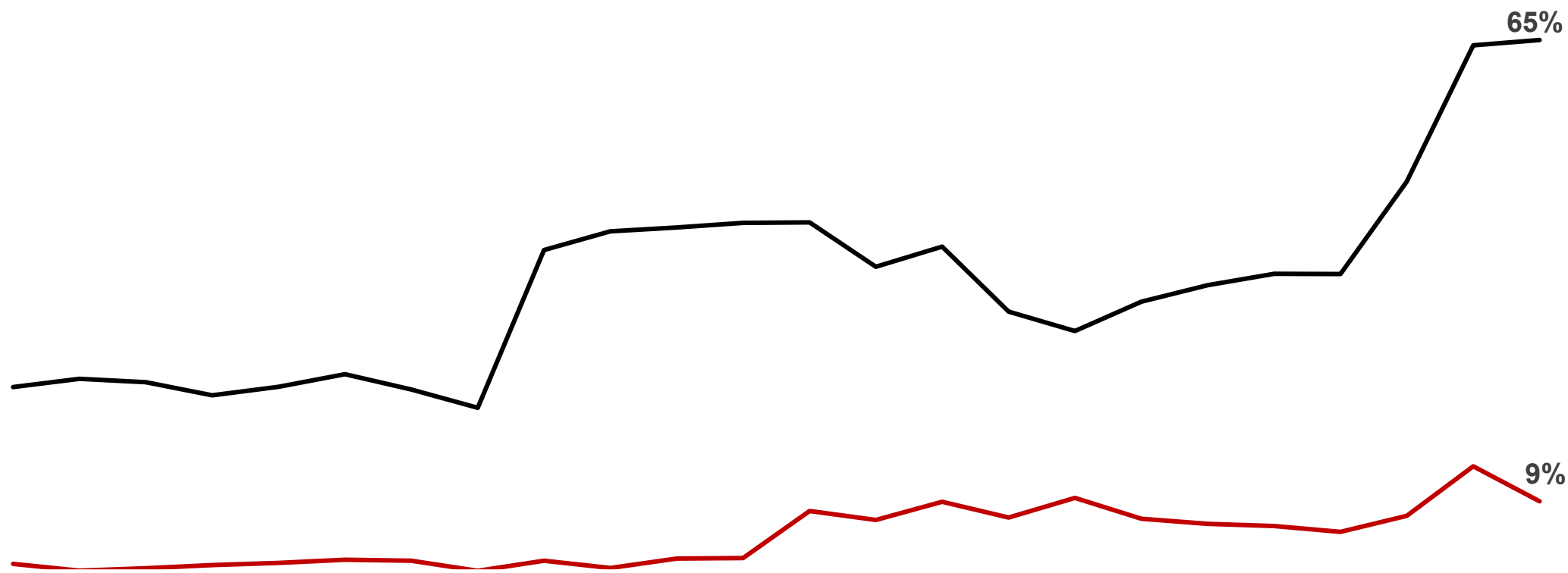


eSIM Smartphone Sales Share
January 2019 – December 2025

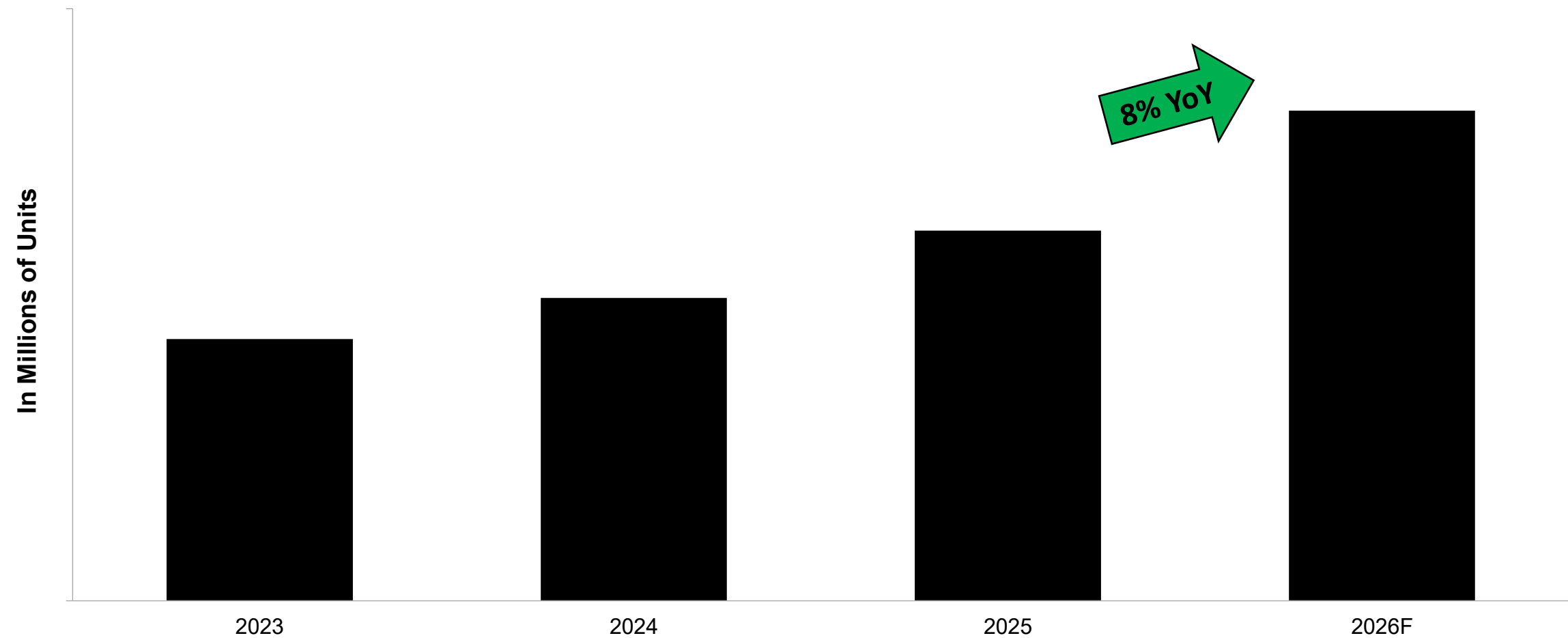
—Overall US Market —Prepaid Market

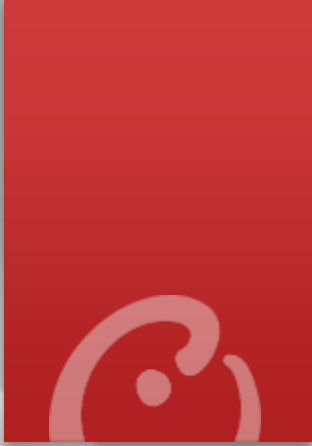


GenAI Smartphone Sales Share
January 2024 – December 2025
—Overall US Market —Prepaid Market



US Refurbished Smartphone Sales Forecast
2023 – 2026F





Thank you!

Maurice Klaehne
maurice@counterpointresearch.com