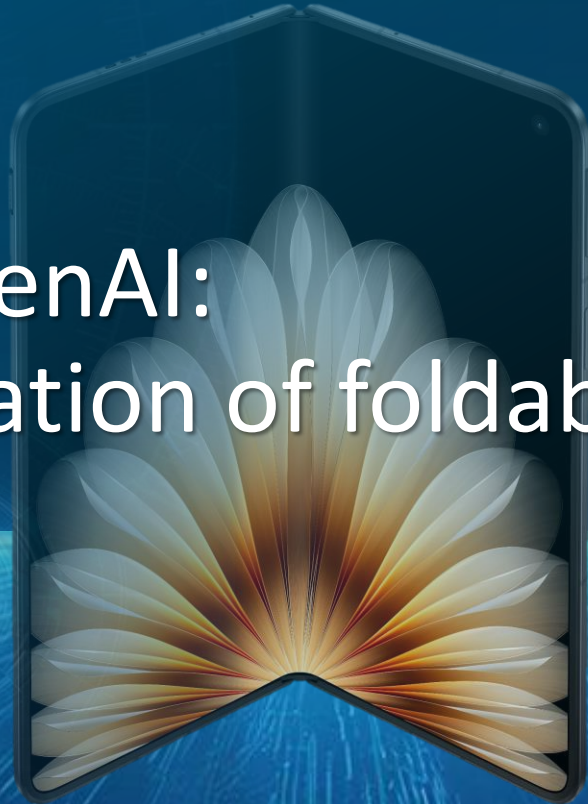


# Ultra-slim design and GenAI: Shaping the next generation of foldable smartphones

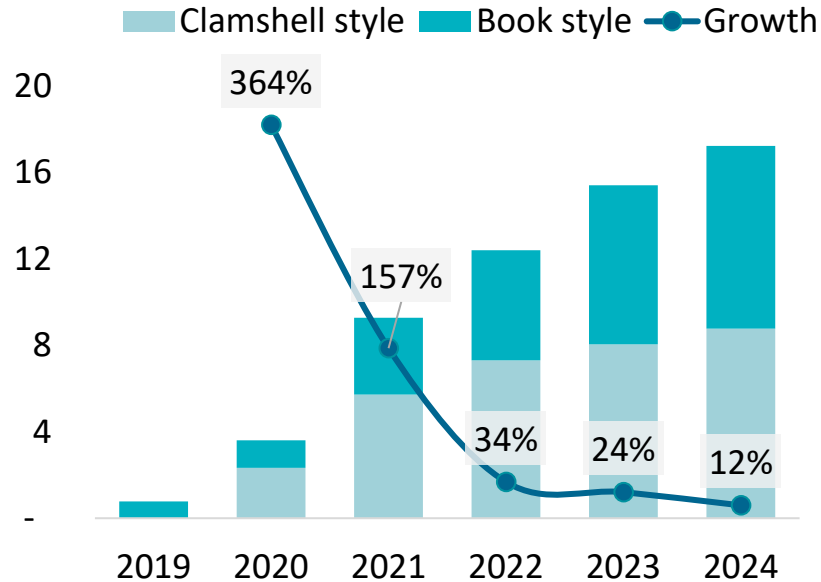


How is the foldable smartphone developing in the global market?

# Foldable is a response to stagnant innovation

Global foldable smartphone shipment and growth rate, 2019 to 2024

Units (million)



Foldable smartphones emerged in 2019 to address stagnation in innovation and meet the demand for breakthroughs in form factors.



The global shipment of foldable smartphones has grown significantly, reaching 17.2 million units in 2024.



After experiencing rapid growth, the foldable smartphone market is slowing down and needs new drivers.

# Foldable strategy: vendors' push for high-end



## Premiumization

Enrich flagship  
portfolio

Selling price  
breakthrough



## Differentiator

Differentiator from  
non-entrants

Early mover  
advantage



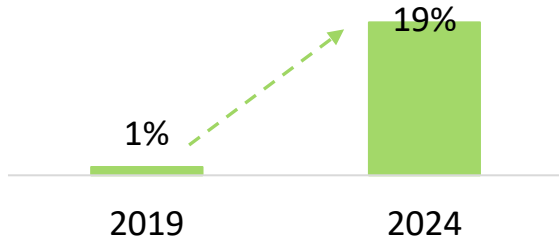
## Brand image

Brand innovation  
awareness

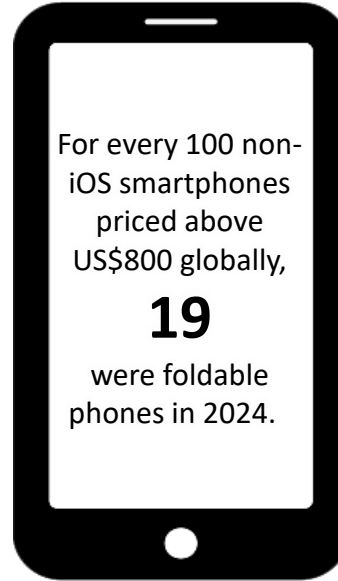
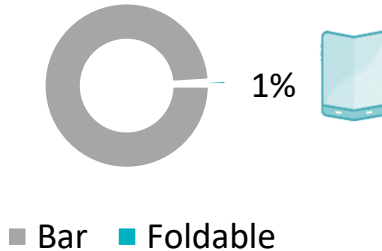
Global visibility

# High-end penetration, but not yet widely adopted

Global foldable smartphone penetration in non-iOS above-US\$800



Global smartphone shipment by form factor, 2024



**US\$2,788**

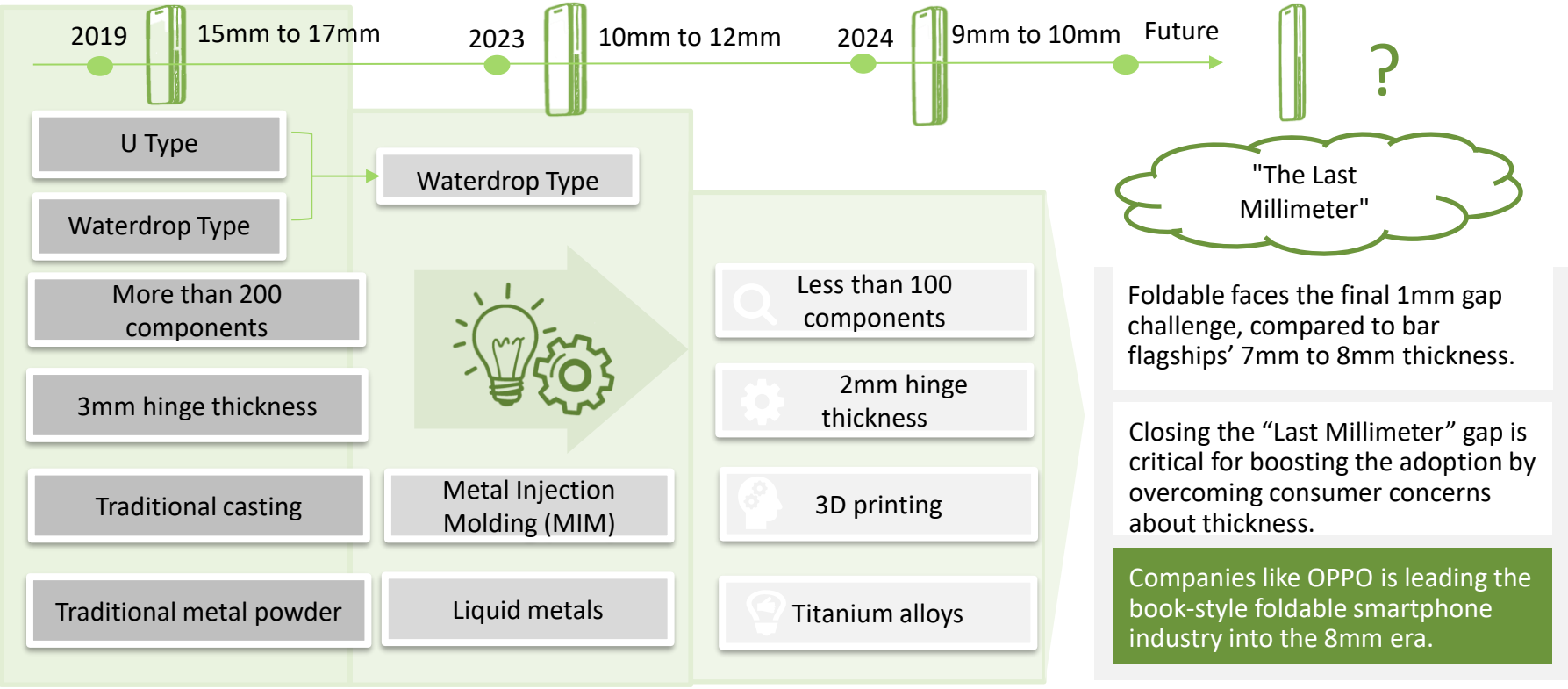
Foldables break through the price ceiling of flagship phones, with the highest current price reaching US\$2,788, driving an average selling price (ASP) increase.

**1%**

Although foldable technology has grown rapidly, it is still not widely adopted and accounts for 1% of global smartphone shipments.

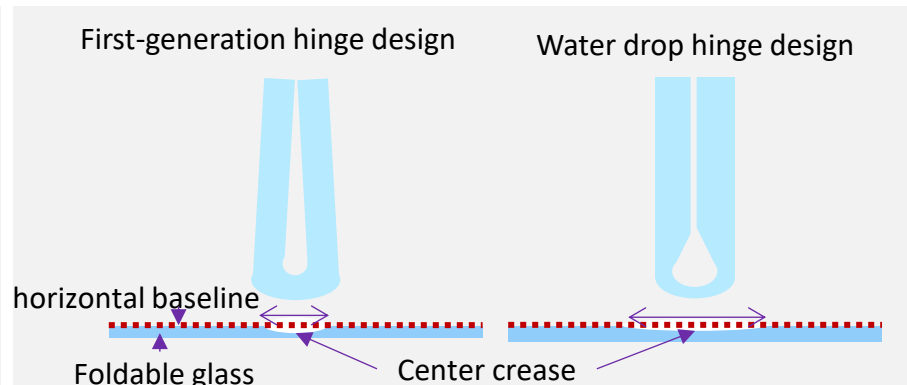
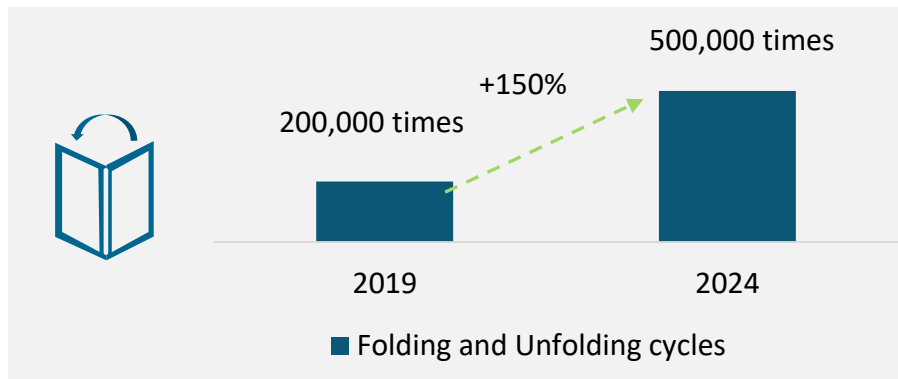
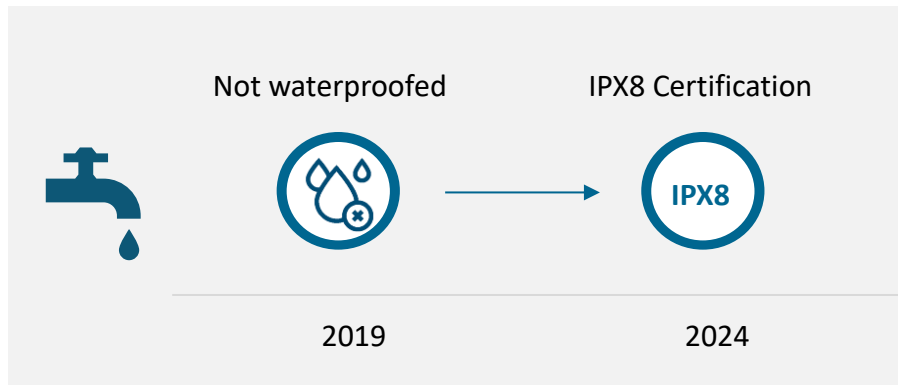
What stops the adoption of foldable smartphones?

# Foldables slim down, but falls short of flagship bar phones



Source: Canalis Smartphone Analysis, February 2025

# Reliability, durability convince consumers to adopt



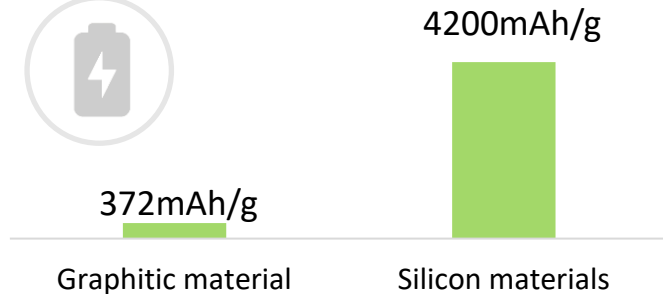
Developments in hinge mechanism, glass materials and architecture design have greatly enhanced water resistance performance, folding cycles, surface strength, and crease visibility of foldable smartphones.

Further enhancing durability to change the consumer perception that foldable devices are fragile and easily damaged is a crucial step in increasing adoption.

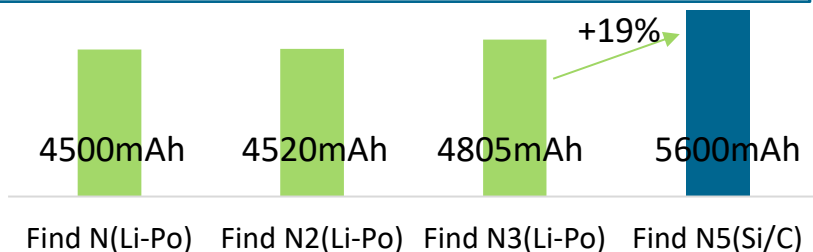


# Balancing battery life and slim design is a dilemma

## Battery theoretical energy density by materials



## OPPO book-type foldable smartphone battery capacity



With advancements in battery technology, particularly the application of silicon-carbon materials, the battery capacity significantly improved. However, balancing battery life and the slim design of the foldable still faces the following challenges:



1

A larger display leads to higher power consumption.



2

The request for slimmer designs requires more compact battery.



3

The internal architecture of foldable needs to accommodate complex components, resulting in limited space for battery.

How will GenAI boost the use case of foldable smartphones?

# Six key use cases combining foldable and GenAI

## User cases



Photo and  
video editing



Content  
creation



Productivity

## With foldable display

Larger displays enable users to easily and efficiently edit photos and videos of various sizes on their mobile phones.

Foldable smartphones become powerful and portable tools for content creators. They can edit and process materials anytime and anywhere.

The expansive display provides a tablet-like workspace. Users can efficiently manage tasks such as email, spreadsheets and presentations.

## With GenAI

GenAI offers features like AI Eraser, AI Unblur, AI Clarity Enhancer and AI Reflection Remover, which, when combined with large screens, significantly enhance the experience.

Creators can use AI-powered tools to edit photos and videos directly on the large screen or generate creative ideas for social media content on the go.

OPPO's AI Assistance for Documents can help users understand, summarize and generate follow-up context based on what users want.



# Six key use cases combining foldable and GenAI

## User cases



**Multiple user interactions**

Multiple screens allow multiple users to interact with the device simultaneously, such as providing a real-time preview on the outer screen while taking photos or live streaming.



**Multitasking**

Foldable smartphones enable users to run multiple apps effectively without compromising visibility.



**Cross device experience**

A more PC-like aspect ratio reduces the sense of disconnection between smartphones and PCs, offering a seamless experience.

## With GenAI

Multiple displays or split screens can enable multiple users to simultaneously use AI-powered tools like communicating with live translation with different or split displays.

OPPO's AI Screen Split provides more active split-screen recommendations, enhancing multitasking with suitable applications.



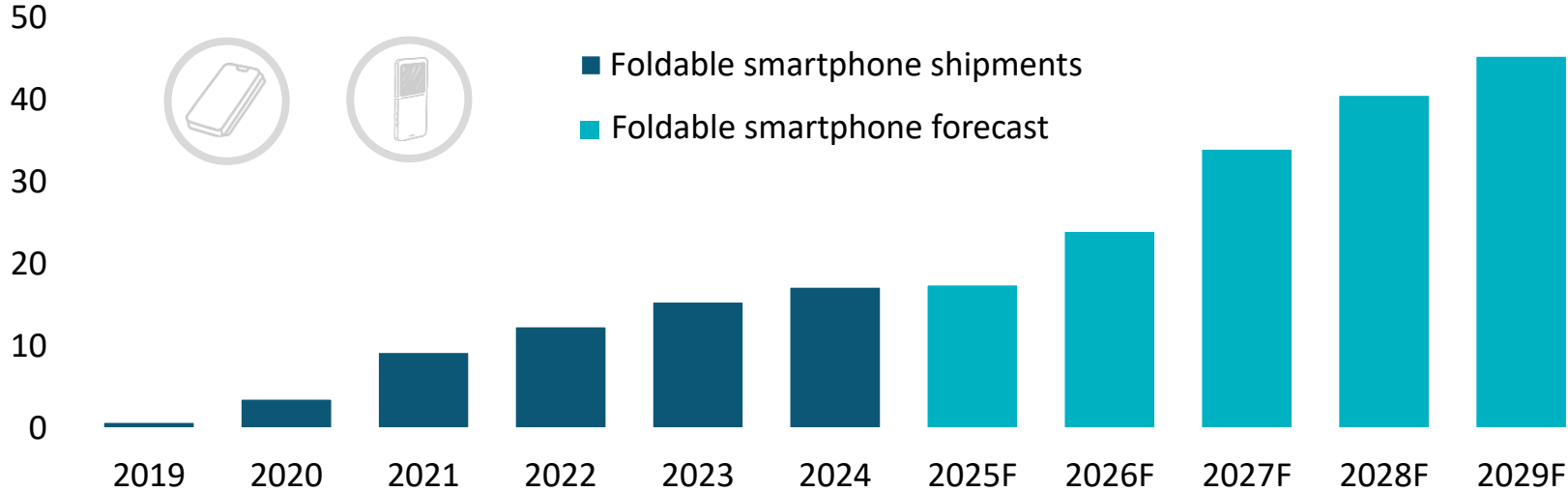
GenAI can enhance the cross-device experience between foldables and other hardware by providing smarter, context-aware interactions.

What is the outlook of foldable smartphones?

# Foldable smartphone to double in three years

Worldwide foldable smartphone estimates and forecasts, 2019 to 2029F

Shipments (million)



Source: Canals Smartphone Analysis, February 2025

# Eight key factors driving the long-term growth of foldables



Lighter, thinner design closer to bar phone



Longer battery and product life



Chinese vendors' global presence



Cost scale effect brought by volume



Explosion of use cases driven by GenAI



Accumulation of consumer perception

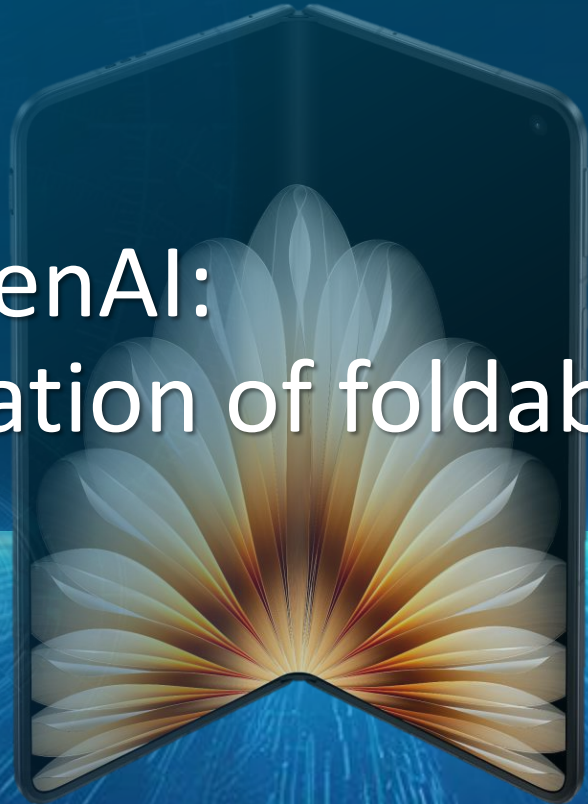


Improving ecosystem experience across devices and platforms



New form factor innovation

# Ultra-slim design and GenAI: Shaping the next generation of foldable smartphones







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