

Qualcomm will continue to be Apple's sole 5G modem supplier until the 16' iPhone series

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Recently, there have been many rumors that Qualcomm will no longer be the exclusive 5G modem supplier for Apple after the iPhone 15 series launches later this year. However, with the California-based giant having problems with its internal 5G solution, it is likely that it will continue to have to extend its agreement with its partner for at least another year. Qualcomm is said to also provide 5G modems for the iPhone 16 series.

Qualcomm is expected to continue to play the role of Apple's sole 5G modem supplier until at least the iPhone 16 series. According to industry sources, Qualcomm is likely to supply Apple with the Snapdragon X70 5G modem next year when the iPhone 16 series launches, accompanied by a series of improvements in energy efficiency (power saving) compared to the Snapdragon X65 that is not expected to change the download speed of all iPhone 14 models. 10Gbps - not a bad number anyway. According to analysts Blayne Curtis and Tom O'Malley from Barclays, the fact that Apple constantly has problems with its own 5G modem is also the reason why the iPhone SE 4 model has been delayed for at least two years.



As for Qualcomm, the company has a habit of charging its partners quite a premium for being the exclusive supplier for a particular component. For the Snapdragon 8 Gen 2, the San Diego-based company is said to have charged up to \$160 per chipset, making the chip's selling price more than the Apple A16 Bionic. Likewise, the Snapdragon 8 Plus Gen 1 isn't cheap either. Rumor has it that Qualcomm is charging \$130 for each chip sold. Therefore, it is not too difficult to understand when Apple is trying to "escape" Qualcomm in the 5G modem

segment, but the results so far have not been as expected.

Assuming that Qualcomm will charge Apple the same amount of \$160 for the Snapdragon X70, launching the iPhone SE 4 with Apple would be a 'disadvantage' as the 5G modem would take up too much of the profit, not to mention the other associated costs. Sadly, although Apple kicked off its own modem development in 2020, three years on, no notable success has been announced. There have been whispers that Apple will complete the first batch of homegrown 5G modems in 2025, but all are just predictions. Let's wait and see.

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