



IT Market Alert May 2025

Welcome to this month's IT Market Alert, delivering you key market knowledge viewed during **April 2025**.
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The largest number of price increases happened on April 8th with **59,474**

- PC vendors temporarily cancel shipments to US amid tariff panic
- Smartphone market enjoys tariff-induced purchase spike
- VR/AR headsets take a break from growth this year

President Trump spooked markets as new tariff announcements (and threats of announcements) kept the market guessing. His 'Liberation Day' announcements on April 2 introduced a 10% baseline on nearly all imports, along with a 25% tariff on automobiles and parts. 'Reciprocal' tariffs aimed at redressing trade deficits went much higher on a per-country basis.

The threats and walk-backs had the industry scurrying to adapt. Q1 saw a rush to procure equipment ahead of further upheaval. Then the president warned that there would soon be tariff rates for semiconductors, and NVIDIA shares plummeted after the company revealed that US government export controls would make it more difficult to export its H20 chip to China.

The roller coaster continues. In early-to-mid May, the US announced deals with the UK and China (the latter for 90 days), defusing tariff fears.

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Exchange Rate

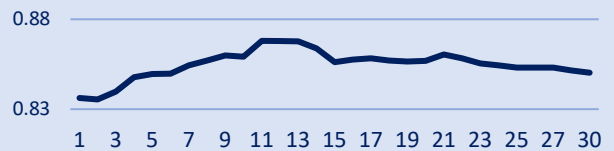
EUR/USD opened at a multi-week trough of 1.0788 on April 1, then surged above 1.10 by April 3 (1.1097) before a brief pullback into the 1.0950–1.10 corridor in the following week. Mid-month saw a decisive break higher: by April 11 the pair reached 1.1346, and it peaked at 1.1476 on April 22 (its strongest since early March) before easing back into the 1.1350–1.14 range to close the month at 1.1373.

EUR/GBP traded around 0.835–0.840 early in the month, touching its low for the month of 0.8345 on April 2. From April 3 onward, it began a steady appreciation, breaking 0.85 GBP by the 4th and climbing to a mid-month peak of 0.8667 on April 11. After that high, the pair retraced slightly but held above 0.855 GBP through most of the month, closing April near 0.852 GBP.

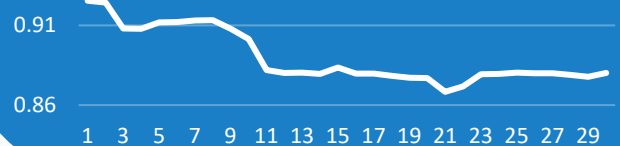
Early-month dollar strength reflected a U.S. Bureau of Labor Statistics' report on April 4 showing a robust 228,000 gain in March non-farm payrolls, well above forecasts and bolstering the greenback.

The ECB cut rates by 25 basis points amid concerns over US tariffs, which initially dipped the single currency but also bought an influx of safe-haven capital. Euro-area inflation remained steady at 2.2%, while the UK's Consumer Price Index dropped to 2.6% in the year to March from 2.8% in the year to February.

EURO POUND (EUR) PER 1 BRITISH POUND (GBP)



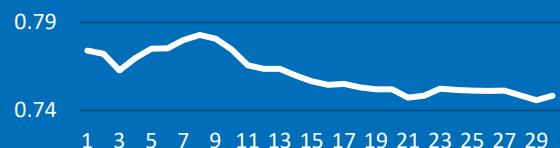
US DOLLAR (USD) PER 1 EURO (EUR)



BRITISH POUND (GBP) PER 1 EURO (EUR)



US DOLLAR (USD) PER 1 BRITISH POUND (GBP)





Price Changes and News Through April 2025

Phones and Tablets

Smartphone vendors shipped 304.9m units in Q1, up 1.5% YoY, [IDC said](#). Production rose as manufacturers tried to get in ahead of increased US tariffs on Chinese imports. The smartphone market in the US grew over 5% as the same tariffs concerns prompted consumers to make purchases early.

Samsung regained its market leadership with 60.6m units, thanks to the success of its Galaxy S25 and mid-range Galaxy A series. Apple achieved its best Q1 ever in unit shipments at 57.9m, stockpiling to avoid tariffs, but it also faced a decline in China due to its exclusion from a government subsidy program there designed to stimulate consumption. Apple's equipment was too expensive for the program but Xiaomi's wasn't; the latter shipped 41.8m units.

OPPO's shipments declined to 23.5m units, while Vivo grew by 6.3% YoY, reaching 22.7m units.

Traditional PCs

[According to IDC](#), PC shipments rose 4.9% YoY in Q1 to 63.2m units, with the growth occurring before the impact of new US tariffs announced on April 2. The company identified a strong demand for commercial PCs, driven by the pending end of support for Windows 10 in October. The rise of on-device AI is also a factor, it said.

Lenovo led the market for traditional PCs with a 24.1% market share, followed by HP with 20.2% and Dell Technologies with 15.1%. Apple and ASUS also showed significant YoY growth, with increases of 14.1% and 11.1%, respectively.

IDC warned to watch for volatility around the tariffs and any inflationary pressure that they cause. Price increases will likely be passed on to consumers, it predicted. Tariff shockwaves hit the industry mid-month, with both Razer and upgradeable PC manufacturer Framework [already cancelling sales of their laptops](#) in the US, with big-name vendors [Dell, HP, and Lenovo at least temporarily following suit](#).

Premium Ultramobiles & Wearables

[IDC said](#) that AR and VR headset growth is due for a pause. Global shipments of these headsets grew 10% last year after two years of decline, it said, with commercial shipments up 14.9%. However, it predicted an overall 12% decline in shipments this year due to delayed product launches. Only Meta and XReal saw YoY growth, it added. They were also responsible for driving the ASP up due to premium offerings.

Meta still dominated with a 74.6% share, followed by Apple (5.2%), Sony (4.3%), ByteDance (4.1%), and XREAL (3.3%). Only Meta and XREAL experienced YoY growth among the top five brands due to new products and gaming-focused use cases.

Things will pick up substantially next year, the company said, anticipating an 87% rebound in 2026. while the 2025-2029 CAGR will hit a healthy 38.6%.



Processors, MEMS, Semiconductors

Worldwide silicon wafer shipments rose by 2.2% YoY to 2,896m square inches (MSI) in Q1 2025 from Q1 2024's figure of 2,834 MSI, [said the SEMI Silicon Manufacturers Group \(SMG\)](#). Sequentially, shipments decreased by 9.0% from the previous quarter's 3,182 MSI, attributed to seasonality and high inventory levels. The report highlighted a 6% YoY growth in 300mm silicon wafer shipments while shipments for 200mm and smaller wafer sizes declined, reflecting weak demand for legacy devices.

Inventory adjustments across the supply chain contributed to the slowdown in overall shipments, said the Group.

Memory

[TrendForce saw caution](#) over US tariffs in the DRAM market leading to reduced buying interest, although the US government's three-month suspension improved confidence slightly. OEMs paused shipments to assess the impact of tariff-related costs and risks, and prices rose.

The average spot price for DDR4 1Gx8 3200MT/s chips increased by 1.58%, reaching US\$1.673. TrendForce expected conventional DRAM prices to fall just 0.5% QoQ in Q2, while average DRAM pricing including HBM [will rise by 38%](#).

Major PC OEMs requested increased production from ODMs to ensure stable DRAM supply, leading to steady PC and server DRAM prices.

Mobile DRAM demand is on the rise due to China's smartphone subsidies and increased shipments of high-end smartphones.

The consumer DRAM segment is set to benefit from infrastructure rollouts, leading to a projected return to QoQ growth in demand. DDR4 contract prices will rise by 0.5% in Q2 2025 due to slow production and rebounding demand, the analyst company said. DDR3 prices will remain flat as overstock levels continue to impact the market despite recent procurement efforts, it predicted.

Storage

Seagate's revenues for fiscal Q3 2025 [rose](#) 30.5% YoY to \$2.16bn, despite a sequential decline due to supply constraints. GAAP profit rose to \$340m from last year \$25m. The company is focusing on increasing its HAMR (Heat-Assisted Magnetic Recording) products to meet cloud customer demand. Temporary supply constraints affected non-HAMR drive production, leading to an under-served market in the latest quarter, it said.

Shipments totalled 132.9 exabytes, down 5% QoQ but up 50% YoY, primarily affecting near-line drives. The average capacity per near-line drive increased to 16.2 TB, up 8% from the previous quarter and significantly higher than last year's 8.7 TB.

The NAND flash market saw transactions halt temporarily due to tariff volatility, [TrendForce said](#). Still, uncertainties around the second half of 2025 are slowing down transactions. Previous price hikes from production cuts are still affecting NAND flash market dynamics.



Display

[Omdia tracked](#) a 19.2% YoY growth in global OLED TV shipments for February 2025. Conversely, LCD shipments declined by 2.4% in February.

These figures show a rise in popularity for OLED screens, which accounted for 23% of TV revenues in Europe last year but only represented 8% of total volume. Mini LED technology is also gaining traction, achieving a shipment volume of 3m units in Q4 2024, surpassing OLED's 2m.

Printers

IDC said that global hardcopy peripherals shipments grew 3.1% YoY to almost 22m units in Q4, representing the second consecutive year of growth due to a mixture of improved economic conditions and vendor promotions. Western European shipments grew 10.5%. HP led with 34.2% market share and 7.5m shipments, followed by Epson with 22.5% and 4.9m units shipped. Canon, Brother, and Pantum followed in that order.

Network Products

Analysing the effect of tariffs on the US networking market, Dell'Oro predicted a 5-15% price bump, given that China, Taiwan, and Vietnam are the primary sources for these products. For broadband equipment, it had reduced its YoY growth forecast for 2025 by 7.1 percentage points to 1.4% for optical line terminals and optical network terminals, which handle data at the service-side and customer-side of optical networks.



Monthly Statistics

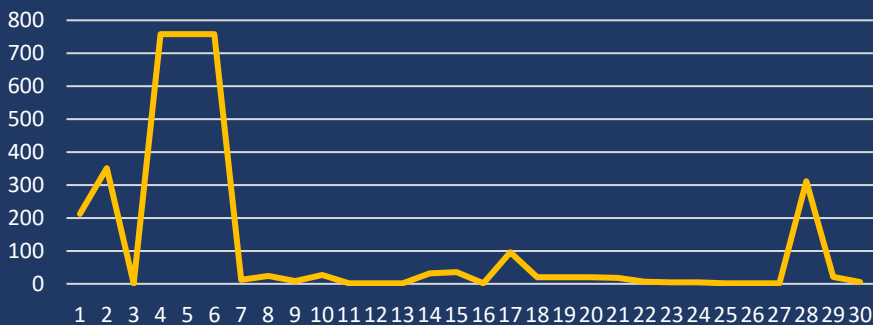
Price increases peaked at 59,474 items on April 8 and fell to a low of 334 items on April 16. In the first week, upward price adjustments climbed sharply, then eased off mid-month and settled into a moderate pace through the end of April.

Markdowns reached their highest point at 57,088 items on April 17 after dipping to the monthly low of 2,406 items on April 16. Discount activity was subdued in early April, surged immediately after mid-month, then tapered off toward month-end.

Restocking hit a high of 13,731 new items on April 3 and dropped to 956 items on April 21. Suppliers loaded inventory heavily at the start of the month and then gradually reduced delivery volumes.

Stock draw-downs peaked at 23,823 items on April 4 and hit a minimum of 4,530 items on April 11. The largest outflows occurred in the opening days, after which withdrawal rates steadied at lower levels for the remainder of April.

NEW PRODUCTS



MONTHLY STATS

