

Macro Roundup Article

Headline: [What it Would Take for Apple to Disentangle itself from China](#)

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Tweet: The iPhone makes up 80% of smartphone operating profits on less than 20% of handset shipments. The sophistication of the product will be a challenge to moving more than 10-20% of manufacturing to countries like India and Vietnam by 2030. @ft

Summary: Some supply chain experts argue that the growth numbers in iPhone “manufacturing” in India are more hype than reality. Although 200M phones were made in India last year, they are not in the same league as Apple’s products. The most popular models typically sell for \$250 or less, while average iPhones cost nearly \$1,000 and require more sophisticated automation and labor intensity. Woo-Jin Ho, hardware analyst at Bloomberg Intelligence, projects that Apple will shift just 10% of iPhone production outside of China by 2030, or at most 20% if it moves aggressively.

Primary Topic: Trade (not deficits)

Topics: China, Factoid, GDP, News article, Sell-by Date, Trade (not deficits)

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