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Report: Apple Plans to Source All US-Bound iPhones From India by 2026

Friday April 25, 2025 1:36 am PDT by [Tim Hardwick](#)

Apple is accelerating its manufacturing shift away from China, with plans to assemble all U.S.-bound iPhones in India by the end of 2026, according to a new [Financial Times](#) report.



The ambitious timeline would require Apple to double its current iPhone production capacity in India. It marks a major acceleration of Apple's supply chain diversification strategy, which has been gradually expanding in recent years.

Currently, the majority of iPhones are manufactured in China through partners like Foxconn. The U.S. market accounts for approximately 28 percent of Apple's global iPhone shipments, which totaled 232.1 million units in 2024, according to International Data Corporation.

The shift comes amid renewed trade tensions between the US and China. President Trump recently implemented substantial tariffs on Chinese imports, causing Apple's market value to drop by approximately \$700 billion. In response, Apple reportedly rushed existing Indian-manufactured iPhones to the U.S. to avoid higher tariffs imposed on Chinese goods.

The timing isn't coincidental. CEO Tim Cook has reportedly been [working diligently](#) behind the scenes to protect Apple from the full impact of Trump's tariffs. [As reported last week](#), Cook secured a temporary exemption for iPhones, Macs, Apple Watches, and iPads from the bulk of Trump's 145 percent tariffs on Chinese imports after phone calls with Commerce Secretary Howard Lutnick and other senior White House officials.

The exemption might be short-lived, however. Trump later indicated that "no one would be getting off the hook" and that electronics companies would be "moving to a different tariff bucket" as his administration reviews semiconductors and the electronics supply chain.

Apple has been gradually building manufacturing capacity in India with partners Tata Electronics and Foxconn. The company's relationship with the Indian government may prove helpful, as India is currently working toward a bilateral trade agreement with the U.S., which could provide more favorable trade conditions.

Despite the assembly pivot, Apple still relies heavily on Chinese suppliers for hundreds of iPhone components. The company has pledged a [\\$500 billion investment](#) in the United States but has not announced plans to bring iPhone manufacturing to American soil.

Apple is scheduled to report quarterly earnings next week, where investors will be watching closely for any comments on how these tariffs and supply chain shifts might impact the company's future performance.

Note: Due to the political or social nature of the discussion regarding this topic, the discussion thread is located in our [Political News](#) forum. All forum members and site visitors are welcome to read and follow the thread, but posting is limited to forum members with at least 100 posts.

Tags: [China](#), [India](#)

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Monday April 20, 2026 7:40 am PDT by [Hartley Charlton](#)

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Thursday May 7, 2026 12:46 pm PDT by [Juli Clover](#)

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Friday May 15, 2026 7:09 am PDT by [Tim Hardwick](#)

Apple has slashed prices on the iPhone 17 Pro series in China by 1,000 yuan (around \$138) in anticipation of the annual 618 shopping festival, one of the country's largest mid-year online retail events. The cuts went live on Friday on JD.com and Tmall, with Apple's official...

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In all honesty I don't think it matters. The orange prince is only interested in himself and making his rich friends richer. The rest of the world is going to move on from the US. They are no longer seen as a reliable trade or defence partner.

Score: 65 Votes (Like | Disagree)

Dwalls90

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So at the end of the day, manufacturing isn't coming back to the US, meaning the tariffs really didn't accomplish Trump's goal. Got it.

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Don't run... Once production will be moved in India, the orange will start again the tariffs game against India...

100% Agree.

Soon enough India will be seen as a threat to US "jobs" and boom! 324% (Just a pick a random bigly number) tariffs.

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Don't run... Once production will be moved in India, the orange will start again the tariffs game against India...

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wait for Trump to add a 60% tariff on India by the end of 2026 because he woke up one morning not liking something he read about India. Unpredictable cat and mouse game

Score: 20 Votes (Like | Disagree)

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