

Android's Falling Star: Tech Edge

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NEW YORK ([TheStreet](#)) -- Maybe Android really did peak already. See [reason No. 5 in this story](#). (Hint: it's the **Verizon (VZ)** iPhone.)

Shares of **Google (GOOG)** Android phone suppliers and manufacturers like **Qualcomm (QCOM)** and **Motorola (MOT)** are down 2% Thursday despite a widespread market rally.

Investor concerns seem to be centered on fears that Android phone sales are starting to cool off from red-hot levels in the second quarter due to the impending arrival of **Apple's (AAPL)** iPhone at Verizon.



Two analyst reports that arrived late Wednesday have helped ring the Android alarm.

Ed Snyder at Charter Equity Research wrote a note that revealed new details about Apple's iPhone plans. A CDMA version of the iPhone 4 is set for a January arrival at Verizon, Snyder wrote. Then in June, Apple introduces the iPhone 5, a 3G "world phone" compatible with **AT&T (T)**, Verizon and European networks.

Yes, we've heard and reported many of these points before, but Snyder offers some behind-the-scenes drama of how Qualcomm may have failed to meet Apple's deadline for a fully-integrated world phone system by January. Hence, Apple will go with a CDMA iPhone in January and a multi-network iPhone 5 in June, when Apple usually updates the iPhone.

This, by the way, means no 4G iPhone in 2011.

Add that bit of analysis to a report by [Rodman Renshaw's Ashok Kumar](#) that said Motorola's Droid phone shipments to Verizon have been slowing down. Also, Verizon has "reduced its forward commitments" to Motorola Droid phones ahead of the Verizon iPhone arrival.

If true -- and it makes a fair amount of sense -- Apple's iPhone arrival at Verizon will upset not only the Droid squad of Motorola and **HTC**, but it will further punish **Research In Motion's (RIMM)** BlackBerry position at the No.1 carrier.

Apple's iPhone is a game changer for sure, but few would have guessed it would start changing the game so soon.

--Written by Scott Moritz in New York.

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