

Consumer Electronics in Germany

October 2023

Table of Contents

EXECUTIVE SUMMARY

Consumer electronics in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer electronics?

MARKET DATA

Table 1 - Sales of Consumer Electronics by Category: Volume 2018-2023

Table 2 - Sales of Consumer Electronics by Category: Value 2018-2023

Table 3 - Sales of Consumer Electronics by Category: % Volume Growth 2018-2023

Table 4 - Sales of Consumer Electronics by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Consumer Electronics: % Volume 2019-2023

Table 6 - LBN Brand Shares of Consumer Electronics: % Volume 2020-2023

Table 7 - Distribution of Consumer Electronics by Channel: % Volume 2018-2023

Table 8 - Forecast Sales of Consumer Electronics by Category: Volume 2023-2028

Table 9 - Forecast Sales of Consumer Electronics by Category: Value 2023-2028

Table 10 - Forecast Sales of Consumer Electronics by Category: % Volume Growth 2023-2028

Table 11 - Forecast Sales of Consumer Electronics by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Computers and Peripherals in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shifts in preference and high penetration lead to adjustments in computers and peripherals

All categories move back towards pre-pandemic level of sales

Increasing specialisation in computers and peripherals

PROSPECTS AND OPPORTUNITIES

Sales of premium laptops may slow due to economic situation

Innovations in laptops will put pressure on tablets

Computers once again expected to focus on high-performance devices

CATEGORY DATA

Table 12 - Sales of Computers and Peripherals by Category: Volume 2018-2023

Table 13 - Sales of Computers and Peripherals by Category: Value 2018-2023

Table 14 - Sales of Computers and Peripherals by Category: % Volume Growth 2018-2023

Table 15 - Sales of Computers and Peripherals by Category: % Value Growth 2018-2023

Table 16 - Sales of Computers by Category: Business Volume 2018-2023

Table 17 - Sales of Computers by Category: Business Value MSP 2018-2023

Table 18 - Sales of Computers by Category: Business Volume Growth 2018-2023

Table 19 - Sales of Computers by Category: Business Value MSP Growth 2018-2023

Table 20 - NBO Company Shares of Computers and Peripherals: % Volume 2019-2023

Table 21 - LBN Brand Shares of Computers and Peripherals: % Volume 2020-2023

Table 22 - Distribution of Computers and Peripherals by Channel: % Volume 2018-2023

Table 23 - Forecast Sales of Computers and Peripherals by Category: Volume 2023-2028

Table 24 - Forecast Sales of Computers and Peripherals by Category: Value 2023-2028
 Table 25 - Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2023-2028
 Table 26 - Forecast Sales of Computers and Peripherals by Category: % Value Growth 2023-2028
 Table 27 - Forecast Sales of Computers by Category: Business Volume 2023-2028
 Table 28 - Forecast Sales of Computers by Category: Business Value MSP 2023-2028
 Table 29 - Forecast Sales of Computers by Category: Business Volume Growth 2023-2028
 Table 30 - Forecast Sales of Computers by Category: Business Value MSP Growth 2023-2028

[In-Car Entertainment in Germany](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price pressures and external factors force further volume decline in 2023
 Built-in vehicle technology and lack of dashboard standardisation affect sales
 Garmin overtakes TomTom within in-car navigation

PROSPECTS AND OPPORTUNITIES

In-car entertainment in Germany faces steep decline as challenges persist
 Pioneering car brands have promising prospects, but could impact sales moving forward
 E-commerce to see growth in in-car entertainment, shifting the retail landscape

CATEGORY DATA

Table 31 - Sales of In-Car Entertainment by Category: Volume 2018-2023
 Table 32 - Sales of In-Car Entertainment by Category: Value 2018-2023
 Table 33 - Sales of In-Car Entertainment by Category: % Volume Growth 2018-2023
 Table 34 - Sales of In-Car Entertainment by Category: % Value Growth 2018-2023
 Table 35 - NBO Company Shares of In-Car Entertainment: % Volume 2019-2023
 Table 36 - LBN Brand Shares of In-Car Entertainment: % Volume 2020-2023
 Table 37 - Distribution of In-Car Entertainment by Channel: % Volume 2018-2023
 Table 38 - Forecast Sales of In-Car Entertainment by Category: Volume 2023-2028
 Table 39 - Forecast Sales of In-Car Entertainment by Category: Value 2023-2028
 Table 40 - Forecast Sales of In-Car Entertainment by Category: % Volume Growth 2023-2028
 Table 41 - Forecast Sales of In-Car Entertainment by Category: % Value Growth 2023-2028

[Home Audio and Cinema in Germany](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic problems continue to weaken growth prospects
 Advances in technology safeguard some sales
 Rising competition brings benefits for consumers

PROSPECTS AND OPPORTUNITIES

Smart home integration set to evolve further
 Substitutes will inhibit sales in the long term
 Increasing establishment as niche products

CATEGORY DATA

Table 42 - Sales of Home Audio and Cinema by Category: Volume 2018-2023
 Table 43 - Sales of Home Audio and Cinema by Category: Value 2018-2023
 Table 44 - Sales of Home Audio and Cinema by Category: % Volume Growth 2018-2023
 Table 45 - Sales of Home Audio and Cinema by Category: % Value Growth 2018-2023

Table 46 - NBO Company Shares of Home Audio and Cinema: % Volume 2019-2023
 Table 47 - LBN Brand Shares of Home Audio and Cinema: % Volume 2020-2023
 Table 48 - Distribution of Home Audio and Cinema by Channel: % Volume 2019-2023
 Table 49 - Forecast Sales of Home Audio and Cinema by Category: Volume 2023-2028
 Table 50 - Forecast Sales of Home Audio and Cinema by Category: Value 2023-2028
 Table 51 - Forecast Sales of Home Audio and Cinema by Category: % Volume Growth 2023-2028
 Table 52 - Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2023-2028

Home Video in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weakening sales due to high saturation and economic uncertainty
 OLED TVs sees growth in home video
 LCD TVs fragmenting, as technological advantage of leaders being lost

PROSPECTS AND OPPORTUNITIES

Quality will prevail in home video
 Driving innovation in home video via high-resolution formats
 Streaming services and mobile devices will be two key trends shaping home video

CATEGORY DATA

Table 53 - Sales of Home Video by Category: Volume 2018-2023
 Table 54 - Sales of Home Video by Category: Value 2018-2023
 Table 55 - Sales of Home Video by Category: % Volume Growth 2018-2023
 Table 56 - Sales of Home Video by Category: % Value Growth 2018-2023
 Table 57 - Sales of LCD TVs by Network Connectivity: % Retail Volume 2018-2023
 Table 58 - NBO Company Shares of Home Video: % Volume 2019-2023
 Table 59 - LBN Brand Shares of Home Video: % Volume 2020-2023
 Table 60 - Distribution of Home Video by Channel: % Volume 2018-2023
 Table 61 - Forecast Sales of Home Video by Category: Volume 2023-2028
 Table 62 - Forecast Sales of Home Video by Category: Value 2023-2028
 Table 63 - Forecast Sales of Home Video by Category: % Volume Growth 2023-2028
 Table 64 - Forecast Sales of Home Video by Category: % Value Growth 2023-2028
 Table 65 - Forecast Sales of LCD TVs by Network Connectivity: % Retail Volume 2023-2028

Headphones in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Headphones is one of the few growth categories in consumer electronics
 Premium products and fast replacement as growth guarantors
 Apple stands out, but other brands are also getting stronger

PROSPECTS AND OPPORTUNITIES

Consumption of music and media positively affects headphones
 TWS earbuds expected to remain the consumer favourite, but other categories also have potential
 Demand continues even in times of crisis – outlook for headphones remains positive

CATEGORY DATA

Table 66 - Sales of Headphones by Category: Volume 2018-2023
 Table 67 - Sales of Headphones by Category: Value 2018-2023

Table 68 - Sales of Headphones by Category: % Volume Growth 2018-2023
Table 69 - Sales of Headphones by Category: % Value Growth 2018-2023
Table 70 - NBO Company Shares of Headphones: % Volume 2019-2023
Table 71 - LBN Brand Shares of Headphones: % Volume 2020-2023
Table 72 - Distribution of Headphones by Channel: % Volume 2018-2023
Table 73 - Forecast Sales of Headphones by Category: Volume 2023-2028
Table 74 - Forecast Sales of Headphones by Category: Value 2023-2028
Table 75 - Forecast Sales of Headphones by Category: % Volume Growth 2023-2028
Table 76 - Forecast Sales of Headphones by Category: % Value Growth 2023-2028

Imaging Devices in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued poor performance for imaging devices
Offline specialist stores still perform well in the face of online competition
Established players lead the way, but there are upcoming competitors

PROSPECTS AND OPPORTUNITIES

Action cameras identified as a potential area for growth
Smartphones set to continue to negatively impact digital cameras
Imaging devices consolidates as a niche category

CATEGORY DATA

Table 77 - Sales of Imaging Devices by Category: Volume 2018-2023
Table 78 - Sales of Imaging Devices by Category: Value 2018-2023
Table 79 - Sales of Imaging Devices by Category: % Volume Growth 2018-2023
Table 80 - Sales of Imaging Devices by Category: % Value Growth 2018-2023
Table 81 - NBO Company Shares of Imaging Devices: % Volume 2019-2023
Table 82 - LBN Brand Shares of Imaging Devices: % Volume 2020-2023
Table 83 - Distribution of Imaging Devices by Channel: % Volume 2018-2023
Table 84 - Forecast Sales of Imaging Devices by Category: Volume 2023-2028
Table 85 - Forecast Sales of Imaging Devices by Category: Value 2023-2028
Table 86 - Forecast Sales of Imaging Devices by Category: % Volume Growth 2023-2028
Table 87 - Forecast Sales of Imaging Devices by Category: % Value Growth 2023-2028

Mobile Phones in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Persistent price increases due to supply chain shortages
Device diversity is becoming more prominent
New flagship phones from Samsung and Apple dominate

PROSPECTS AND OPPORTUNITIES

The introduction of 5G in Germany continues to progress, driving demand for 5G-capable smartphones
Extended lifespan of smartphones
New technologies such as foldable phones likely to perform well in the market

CATEGORY DATA

Table 88 - Sales of Mobile Phones by Category: Volume 2018-2023
Table 89 - Sales of Mobile Phones by Category: Value 2018-2023

Table 90 - Sales of Mobile Phones by Category: % Volume Growth 2018-2023
 Table 91 - Sales of Mobile Phones by Category: % Value Growth 2018-2023
 Table 92 - Sales of Smartphones by Screen Size: % Retail Volume 2020-2023
 Table 93 - NBO Company Shares of Mobile Phones: % Volume 2019-2023
 Table 94 - LBN Brand Shares of Mobile Phones: % Volume 2020-2023
 Table 95 - Distribution of Mobile Phones by Channel: % Volume 2018-2023
 Table 96 - Forecast Sales of Mobile Phones by Category: Volume 2023-2028
 Table 97 - Forecast Sales of Mobile Phones by Category: Value 2023-2028
 Table 98 - Forecast Sales of Mobile Phones by Category: % Volume Growth 2023-2028
 Table 99 - Forecast Sales of Mobile Phones by Category: % Value Growth 2023-2028
 Table 100 - Forecast Sales of Smartphones by Screen Size: % Retail Volume 2023-2028

Portable Players in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth in portable players continues to be driven by wireless speakers
 Several products are unequivocally becoming outdated
 Well-known players continue to lead

PROSPECTS AND OPPORTUNITIES

Smart home development continues to impact wireless speakers
 Unstoppable substitution of portable players by smartphones and tablets
 Wireless speakers will be the sole driver of growth in portable players

CATEGORY DATA

Table 101 - Sales of Portable Players by Category: Volume 2018-2023
 Table 102 - Sales of Portable Players by Category: Value 2018-2023
 Table 103 - Sales of Portable Players by Category: % Volume Growth 2018-2023
 Table 104 - Sales of Portable Players by Category: % Value Growth 2018-2023
 Table 105 - NBO Company Shares of Portable Players: % Volume 2019-2023
 Table 106 - LBN Brand Shares of Portable Players: % Volume 2020-2023
 Table 107 - Distribution of Portable Players by Channel: % Volume 2018-2023
 Table 108 - Forecast Sales of Portable Players by Category: Volume 2023-2028
 Table 109 - Forecast Sales of Portable Players by Category: Value 2023-2028
 Table 110 - Forecast Sales of Portable Players by Category: % Volume Growth 2023-2028
 Table 111 - Forecast Sales of Portable Players by Category: % Value Growth 2023-2028

Wearable Electronics in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of wearable electronics suffer from economic problems
 Each product type has a different purpose
 Continued strong performance for leaders in smart wearables – but more fluctuation in activity watches

PROSPECTS AND OPPORTUNITIES

Ever-improving technology set to return the category to growth
 Despite a minor setback in 2023, wearable electronics is well-positioned
 Cross-generational support for growth

CATEGORY DATA

Table 112 - Sales of Wearable Electronics by Category: Volume 2018-2023

Table 113 - Sales of Wearable Electronics by Category: Value 2018-2023

Table 114 - Sales of Wearable Electronics by Category: % Volume Growth 2018-2023

Table 115 - Sales of Wearable Electronics by Category: % Value Growth 2018-2023

Table 116 - NBO Company Shares of Wearable Electronics: % Volume 2019-2023

Table 117 - LBN Brand Shares of Wearable Electronics: % Volume 2020-2023

Table 118 - Distribution of Wearable Electronics by Channel: % Volume 2018-2023

Table 119 - Forecast Sales of Wearable Electronics by Category: Volume 2023-2028

Table 120 - Forecast Sales of Wearable Electronics by Category: Value 2023-2028

Table 121 - Forecast Sales of Wearable Electronics by Category: % Volume Growth 2023-2028

Table 122 - Forecast Sales of Wearable Electronics by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-electronics-in-germany/report.