

Consumer Electronics in Austria

July 2024

Table of Contents

Consumer Electronics in Austria

EXECUTIVE SUMMARY

Consumer electronics in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for consumer electronics?

MARKET DATA

Table 1 - Sales of Consumer Electronics by Category: Volume 2019-2024

Table 2 - Sales of Consumer Electronics by Category: Value 2019-2024

Table 3 - Sales of Consumer Electronics by Category: % Volume Growth 2019-2024

Table 4 - Sales of Consumer Electronics by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Consumer Electronics: % Volume 2020-2024

Table 6 - LBN Brand Shares of Consumer Electronics: % Volume 2021-2024

Table 7 - Distribution of Consumer Electronics by Channel: % Volume 2019-2024

Table 8 - Forecast Sales of Consumer Electronics by Category: Volume 2024-2029

Table 9 - Forecast Sales of Consumer Electronics by Category: Value 2024-2029

Table 10 - Forecast Sales of Consumer Electronics by Category: % Volume Growth 2024-2029

Table 11 - Forecast Sales of Consumer Electronics by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Computers and Peripherals in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for computers falls due to a myriad of reasons

Stable growth in unit selling prices continues

Apple extends its lead in computers and peripherals

PROSPECTS AND OPPORTUNITIES

Downward trend to continue amid saturation and limited buying incentives

Smartphones to increasingly challenge the status of computers

Stronger focus on sustainability

CATEGORY DATA

Table 12 - Sales of Computers and Peripherals by Category: Volume 2019-2024

Table 13 - Sales of Computers and Peripherals by Category: Value 2019-2024

Table 14 - Sales of Computers and Peripherals by Category: % Volume Growth 2019-2024

Table 15 - Sales of Computers and Peripherals by Category: % Value Growth 2019-2024

Table 16 - Sales of Computers by Category: Business Volume 2019-2024

Table 17 - Sales of Computers by Category: Business Value MSP 2019-2024

Table 18 - Sales of Computers by Category: Business Volume Growth 2019-2024

Table 19 - Sales of Computers by Category: Business Value MSP Growth 2019-2024

Table 20 - NBO Company Shares of Computers and Peripherals: % Volume 2020-2024

Table 21 - LBN Brand Shares of Computers and Peripherals: % Volume 2021-2024

Table 22 - Distribution of Computers and Peripherals by Channel: % Volume 2019-2024

Table 23 - Forecast Sales of Computers and Peripherals by Category: Volume 2024-2029

- Table 24 - Forecast Sales of Computers and Peripherals by Category: Value 2024-2029
- Table 25 - Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2024-2029
- Table 26 - Forecast Sales of Computers and Peripherals by Category: % Value Growth 2024-2029
- Table 27 - Forecast Sales of Computers by Category: Business Volume 2024-2029
- Table 28 - Forecast Sales of Computers by Category: Business Value MSP 2024-2029
- Table 29 - Forecast Sales of Computers by Category: Business Volume Growth 2024-2029
- Table 30 - Forecast Sales of Computers by Category: Business Value MSP Growth 2024-2029

In-Car Entertainment in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Negative sales continue for in-car entertainment
- Changes in retail distribution as key player comes under pressure
- Media spotlight on navigation devices

PROSPECTS AND OPPORTUNITIES

- In-car entertainment will become more and more obsolete
- Lower importance of owning a car will also dent sales
- Likely end of Forstinger will reshape retail distribution

CATEGORY DATA

- Table 31 - Sales of In-Car Entertainment by Category: Volume 2019-2024
- Table 32 - Sales of In-Car Entertainment by Category: Value 2019-2024
- Table 33 - Sales of In-Car Entertainment by Category: % Volume Growth 2019-2024
- Table 34 - Sales of In-Car Entertainment by Category: % Value Growth 2019-2024
- Table 35 - NBO Company Shares of In-Car Entertainment: % Volume 2020-2024
- Table 36 - LBN Brand Shares of In-Car Entertainment: % Volume 2021-2024
- Table 37 - Distribution of In-Car Entertainment by Channel: % Volume 2019-2024
- Table 38 - Forecast Sales of In-Car Entertainment by Category: Volume 2024-2029
- Table 39 - Forecast Sales of In-Car Entertainment by Category: Value 2024-2029
- Table 40 - Forecast Sales of In-Car Entertainment by Category: % Volume Growth 2024-2029
- Table 41 - Forecast Sales of In-Car Entertainment by Category: % Value Growth 2024-2029

Home Audio and Cinema in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Home audio and cinema suffers further losses
- Fast decline in home cinema and speaker systems continues despite some positive impulses sales in TVs
- Basic functions and audio quality remains sufficient for mass consumers

PROSPECTS AND OPPORTUNITIES

- Home audio and cinema to see further volume declines
- Smart homes provide untapped growth potential
- Home and audio to become more niche

CATEGORY DATA

- Table 42 - Sales of Home Audio and Cinema by Category: Volume 2019-2024
- Table 43 - Sales of Home Audio and Cinema by Category: Value 2019-2024
- Table 44 - Sales of Home Audio and Cinema by Category: % Volume Growth 2019-2024
- Table 45 - Sales of Home Audio and Cinema by Category: % Value Growth 2019-2024

- Table 46 - NBO Company Shares of Home Audio and Cinema: % Volume 2020-2024
- Table 47 - LBN Brand Shares of Home Audio and Cinema: % Volume 2021-2024
- Table 48 - Distribution of Home Audio and Cinema by Channel: % Volume 2020-2024
- Table 49 - Forecast Sales of Home Audio and Cinema by Category: Volume 2024-2029
- Table 50 - Forecast Sales of Home Audio and Cinema by Category: Value 2024-2029
- Table 51 - Forecast Sales of Home Audio and Cinema by Category: % Volume Growth 2024-2029
- Table 52 - Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2024-2029

Home Video in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Video consumption continues to fall
- New television fee supports demand for televisions
- Hisense investment continues to pay off

PROSPECTS AND OPPORTUNITIES

- Television sales will continue to suffer from changing media consumption
- New television fee may provide some growth impetus
- Mid-price segment will come under further pressure

CATEGORY DATA

- Table 53 - Sales of Home Video by Category: Volume 2019-2024
- Table 54 - Sales of Home Video by Category: Value 2019-2024
- Table 55 - Sales of Home Video by Category: % Volume Growth 2019-2024
- Table 56 - Sales of Home Video by Category: % Value Growth 2019-2024
- Table 57 - Sales of LCD TVs by Network Connectivity: % Retail Volume 2019-2024
- Table 58 - NBO Company Shares of Home Video: % Volume 2020-2024
- Table 59 - LBN Brand Shares of Home Video: % Volume 2021-2024
- Table 60 - Distribution of Home Video by Channel: % Volume 2019-2024
- Table 61 - Forecast Sales of Home Video by Category: Volume 2024-2029
- Table 62 - Forecast Sales of Home Video by Category: Value 2024-2029
- Table 63 - Forecast Sales of Home Video by Category: % Volume Growth 2024-2029
- Table 64 - Forecast Sales of Home Video by Category: % Value Growth 2024-2029
- Table 65 - Forecast Sales of LCD TVs by Network Connectivity: % Retail Volume 2024-2029

Headphones in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Headphones hits saturation point
- TWS earbuds have likely reached peak in volume sales
- Wide availability in retail stores contributes to growth

PROSPECTS AND OPPORTUNITIES

- Demand expected to cool from a high level
- Dominance of TWS earbuds likely to increase
- Apple is well positioned to remain leader over forecast period

CATEGORY DATA

- Table 66 - Sales of Headphones by Category: Volume 2019-2024
- Table 67 - Sales of Headphones by Category: Value 2019-2024

- Table 68 - Sales of Headphones by Category: % Volume Growth 2019-2024
- Table 69 - Sales of Headphones by Category: % Value Growth 2019-2024
- Table 70 - NBO Company Shares of Headphones: % Volume 2020-2024
- Table 71 - LBN Brand Shares of Headphones: % Volume 2021-2024
- Table 72 - Distribution of Headphones by Channel: % Volume 2019-2024
- Table 73 - Forecast Sales of Headphones by Category: Volume 2024-2029
- Table 74 - Forecast Sales of Headphones by Category: Value 2024-2029
- Table 75 - Forecast Sales of Headphones by Category: % Volume Growth 2024-2029
- Table 76 - Forecast Sales of Headphones by Category: % Value Growth 2024-2029

Imaging Devices in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Competition from smartphones cannot be withstood
- Digital cameras' competitive landscape in flux
- Demand for camcorders relatively stable thanks to action cams

PROSPECTS AND OPPORTUNITIES

- No hope in sight for struggling category
- Mirrorless system cameras likely to become key product
- Action cams unlikely to protect camcorders from severe decline

CATEGORY DATA

- Table 77 - Sales of Imaging Devices by Category: Volume 2019-2024
- Table 78 - Sales of Imaging Devices by Category: Value 2019-2024
- Table 79 - Sales of Imaging Devices by Category: % Volume Growth 2019-2024
- Table 80 - Sales of Imaging Devices by Category: % Value Growth 2019-2024
- Table 81 - NBO Company Shares of Imaging Devices: % Volume 2020-2024
- Table 82 - LBN Brand Shares of Imaging Devices: % Volume 2021-2024
- Table 83 - Distribution of Imaging Devices by Channel: % Volume 2019-2024
- Table 84 - Forecast Sales of Imaging Devices by Category: Volume 2024-2029
- Table 85 - Forecast Sales of Imaging Devices by Category: Value 2024-2029
- Table 86 - Forecast Sales of Imaging Devices by Category: % Volume Growth 2024-2029
- Table 87 - Forecast Sales of Imaging Devices by Category: % Value Growth 2024-2029

Mobile Phones in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Volume sales suffer under ever longer replacement cycles
- Campaign to promote repairs should not be underestimated
- Google Inc's Pixel finally comes to Austria

PROSPECTS AND OPPORTUNITIES

- Sustainability to weigh on replacement cycles of smartphones
- Seniors are core audience in feature phones
- More competition expected in Android smartphones

CATEGORY DATA

- Table 88 - Sales of Mobile Phones by Category: Volume 2019-2024
- Table 89 - Sales of Mobile Phones by Category: Value 2019-2024

- Table 90 - Sales of Mobile Phones by Category: % Volume Growth 2019-2024
- Table 91 - Sales of Mobile Phones by Category: % Value Growth 2019-2024
- Table 92 - Sales of Smartphones by Screen Size: % Retail Volume 2021-2024
- Table 93 - NBO Company Shares of Mobile Phones: % Volume 2020-2024
- Table 94 - LBN Brand Shares of Mobile Phones: % Volume 2021-2024
- Table 95 - Distribution of Mobile Phones by Channel: % Volume 2019-2024
- Table 96 - Forecast Sales of Mobile Phones by Category: Volume 2024-2029
- Table 97 - Forecast Sales of Mobile Phones by Category: Value 2024-2029
- Table 98 - Forecast Sales of Mobile Phones by Category: % Volume Growth 2024-2029
- Table 99 - Forecast Sales of Mobile Phones by Category: % Value Growth 2024-2029
- Table 100 - Forecast Sales of Smartphones by Screen Size: % Retail Volume 2024-2029

Portable Players in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High demands of consumers lead to stable current value growth
- Consumers willing to trade up in wireless speakers
- Despite high levels of saturation, e-readers record value growth

PROSPECTS AND OPPORTUNITIES

- Category becomes clearer after elimination of portable multimedia players
- Wireless speakers to remain a popular item
- Increasing penetration rate of e-readers expected

CATEGORY DATA

- Table 101 - Sales of Portable Players by Category: Volume 2019-2024
- Table 102 - Sales of Portable Players by Category: Value 2019-2024
- Table 103 - Sales of Portable Players by Category: % Volume Growth 2019-2024
- Table 104 - Sales of Portable Players by Category: % Value Growth 2019-2024
- Table 105 - NBO Company Shares of Portable Players: % Volume 2020-2024
- Table 106 - LBN Brand Shares of Portable Players: % Volume 2021-2024
- Table 107 - Distribution of Portable Players by Channel: % Volume 2019-2024
- Table 108 - Forecast Sales of Portable Players by Category: Volume 2024-2029
- Table 109 - Forecast Sales of Portable Players by Category: Value 2024-2029
- Table 110 - Forecast Sales of Portable Players by Category: % Volume Growth 2024-2029
- Table 111 - Forecast Sales of Portable Players by Category: % Value Growth 2024-2029

Wearable Electronics in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising penetration rate in wearable electronics
- Wider distribution in jewellery and watch specialist retailers
- Domestic player files for insolvency

PROSPECTS AND OPPORTUNITIES

- Plenty of room for penetration rate to rise
- Variety of retail channels will help drive sales
- No relevant growth expected outside of watches

CATEGORY DATA

Table 112 - Sales of Wearable Electronics by Category: Volume 2019-2024
Table 113 - Sales of Wearable Electronics by Category: Value 2019-2024
Table 114 - Sales of Wearable Electronics by Category: % Volume Growth 2019-2024
Table 115 - Sales of Wearable Electronics by Category: % Value Growth 2019-2024
Table 116 - NBO Company Shares of Wearable Electronics: % Volume 2020-2024
Table 117 - LBN Brand Shares of Wearable Electronics: % Volume 2021-2024
Table 118 - Distribution of Wearable Electronics by Channel: % Volume 2019-2024
Table 119 - Forecast Sales of Wearable Electronics by Category: Volume 2024-2029
Table 120 - Forecast Sales of Wearable Electronics by Category: Value 2024-2029
Table 121 - Forecast Sales of Wearable Electronics by Category: % Volume Growth 2024-2029
Table 122 - Forecast Sales of Wearable Electronics by Category: % Value Growth 2024-2029

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-austria/report.