

Consumer Electronics in Italy

July 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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers concerned about spending, while reconditioned laptops grow in importance

Desktops declines at a slower rate than laptops

Hewlett-Packard remains the largest player

PROSPECTS AND OPPORTUNITIES

Transition to Windows 11 will fuel demand for new computers, while reconditioned products will also remain popular

Eye fatigue in focus in the future

E-commerce to build on stronger consumer base, while neighbourhood stores look to provision of technical assistance

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of new cars down
 Online is a good fit for consumers looking for in-car entertainment products
 From manufacturer of in-car navigation systems to creator of maps

PROSPECTS AND OPPORTUNITIES

Infotainment to become standard
 Music listening and audiobooks sales up
 Cars will become data platforms

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Listening to podcasts is an established habit for many
 Vinyl records are back
 Sony retains lead

PROSPECTS AND OPPORTUNITIES

Increasing integration
 New media means new challenges
 Thinner TVs reduce space for speakers

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

TVs not allowed in bedrooms
Video watching increasing
LG gains lead

PROSPECTS AND OPPORTUNITIES

Streaming makes TV ownership less compelling
Isolation prompts willingness to spend more time outside of home
No government stimulus on the horizon

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports and health industries support sales of headphones
Headphones and impulse purchases
Streaming keeps sales up

PROSPECTS AND OPPORTUNITIES

Time for replacement approaching, while development of on-the-go streaming boosts demand
Co-living an opportunity for headphones, and need to adapt products for use with hearing devices
Growing demand for audiobooks to support sales

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smartphones taking over
 High inflation reduces spending
 Nital stays at the top

PROSPECTS AND OPPORTUNITIES

Continued shift towards more specialist consumer base, but other opportunities remain
 New media, new content
 Outdoor cameras not only to record fun activities

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Foldable and premium smartphones introduced in context of downward trend
 New feature for iPhone14, and demand for iPhone13 up
 Samsung heads to the metaverse

PROSPECTS AND OPPORTUNITIES

Smartphones as health devices
 Replacement purchases the dominant driver
 Smartphones as gates

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wireless speakers sees continued growth
 Sony introduces new Walkman, while reading eBooks is not seen as a leisure activity
 Picnics and music

PROSPECTS AND OPPORTUNITIES

Exercising and sport trending up
 18app not renewed, effective 2024
 Smart speakers to evolve to keep up

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smart watches pair with smartphone apps
 Huawei e-commerce up, while Honor is amongst the most competitive brands
 Apple gaining ground on leader

PROSPECTS AND OPPORTUNITIES

Competition from range of products as independents venture into selling smart watches
 Focus on health and development of sleep monitoring ecosystems
 Tough economy ahead

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-italy/report.