

Consumer Electronics in Australia

July 2024

Table of Contents

Consumer Electronics in Australia

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

High cost of living in Australia continues to negatively impact demand Gamers comprise dynamic consumer segment for computer and peripherals Market seasonality helps drive volumes during discount periods

PROSPECTS AND OPPORTUNITIES

More positive outlook for laptops over the forecast period Apple likely to retain leadership through innovation and regular launch of new models Peripherals will struggle over the forecast period

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

In-car navigation continues to face strong competition from smartphones

Rise in new car sales reduces attractiveness of aftermarket for in-car entertainment

Cars have become an entertainment ecosystem

PROSPECTS AND OPPORTUNITIES

Players need new strategies to stay relevant in declining category

Combination of entertainment and safety can support demand

Consumers increasingly demand seamless installation for visual appeal

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Home audio and cinema continues to lose ground, but still attracts niche audience Soundbars is outstanding performer in declining category Wireless technology is significant influence behind decline

PROSPECTS AND OPPORTUNITIES

Al and voice assistant integration can reduce value decline

Increasing demand for better sound quality

Niche status for many products due to increasing competition from portable players

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

OLED TVs loses momentum as result of affordable indulgence trend Subscription entertainment supports rising demand for internet smart TVs Chinese brands continue to make gains within home video

PROSPECTS AND OPPORTUNITIES

Summer Olympic Games offers potential short-term boost to category sales

TV legislation: Free-to-air channels to internet smart TVs

Al-enhanced televisions to increase competition in the local market

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

TWS earbuds remains most dynamic performer

Wireless headphones complement the connected environment

Premium segment continues to outperform mass models

PROSPECTS AND OPPORTUNITIES

TWS earbuds offers further growth potential over forecast period Promotions will be key to maintaining volume sales growth Physical stores will remain important aspect of shopping experience

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Improving features helps reverse declining trend in imaging devices
Passion drives demand among photography enthusiasts
Gathering information, e-commerce and the importance of physical stores

PROSPECTS AND OPPORTUNITIES

Generation Z - born in a digital era but attracted by analogue Content creation will focus on hybrid cameras

Digital models continue to innovate to capture action market

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Trading in old models for premium smartphones in inflationary environment 5G access and larger screens create new standards for smartphones Apple and Samsung retain lead due to strong brand loyalty

PROSPECTS AND OPPORTUNITIES

Al features to increasingly influence development of smartphones

Australians are early adopters of premium models, supporting future value growth

Demand for feature phones to continue declining, appealing to niche audience

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wireless speakers continues to drive category growth Brands of e-readers attempt to create more innovative solutions amid decline

Smart wireless speakers continue to penetrate Australian households

PROSPECTS AND OPPORTUNITIES

Polarisation within wireless speakers likely as category matures

E-readers set to lose further ground as non-essential device

Physical stores will maintain importance as part of path to purchase

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 Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health and wellness trend continues to drive demand for wearable electronics Digital options continue to appeal to consumers due to greater functionality Australians maintain preference for Apple Watch, driven by dominant smart wearables

PROSPECTS AND OPPORTUNITIES

Battery life along with fashion aspect to remain important features Australia's ageing population to maintain interest in health 5G should positively influence sales

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-australia/report.