

Corporate Strategies in Consumer Electronics

November 2021

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INTRODUCTION

Key findings

GLOBAL OUTLOOK

Sales of consumer electronics jumped in 2021 amid COVID-19 Cost-conscious consumers benefits Chinese phone brands

LEADING COMPANIES AND BRANDS

Leading companies in computers and peripherals R&D costs allocated upstream to chip manufacturers Market strategy of top three laptop manufacturers Leading companies in portable consumer electronics iPhones growing strongly in China Premiumisation hurts Sony share in headphones market Leading companies in in-home consumer electronics Koreans continue to dominate TV production

KEY TRENDS SHAPING CONSUMER ELECTRONICS

BBK Electronics overtakes long-time leader Samsung BBK brands are undercutting Samsung

KEY TRENDS SHAPING CONSUMER ELECTRONICS - AFFORDABLE FLAGSHIPS

Flagship killer is a sprint, not a marathon Vertical integration to ensure product design flexibility Vertical integration extends beyond semiconductors Korean companies have a wide spectrum of business units "Right to repair" legislation faces difficulties (for now) Right to repair/Modular laptops and phones Companies reinventing business models to drive revenue growth New business models: categories and services Services bundles to ease consumers into an ecosystem

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