

Consumer Electronics in France

October 2022

Table of Contents

Consumer Electronics in France

EXECUTIVE SUMMARY

Consumer electronics in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for consumer electronics?

MARKET DATA

Table 1 - Sales of Consumer Electronics by Category: Volume 2017-2022

Table 2 - Sales of Consumer Electronics by Category: Value 2017-2022

Table 3 - Sales of Consumer Electronics by Category: % Volume Growth 2017-2022

Table 4 - Sales of Consumer Electronics by Category: % Value Growth 2017-2022

Table 5 - NBO Company Shares of Consumer Electronics: % Volume 2018-2022

Table 6 - LBN Brand Shares of Consumer Electronics: % Volume 2019-2022

Table 7 - Distribution of Consumer Electronics by Channel: % Volume 2017-2022

Table 8 - Forecast Sales of Consumer Electronics by Category: Volume 2022-2027

Table 9 - Forecast Sales of Consumer Electronics by Category: Value 2022-2027

Table 10 - Forecast Sales of Consumer Electronics by Category: % Volume Growth 2022-2027

Table 11 - Forecast Sales of Consumer Electronics by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Computers and Peripherals in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Declining trends continue due to previous sales boost, as online refurbished devices specialists attract attention

Peripherals starts to normalise and laptops sees new launch activities

Hewlett-Packard maintains its lead, while Apple loses shares due to competition in tablets

PROSPECTS AND OPPORTUNITIES

Further declines expected, variable based on trending demands

Innovation in laptops and competitive pricing will drive trends

E-commerce set to remain notable, as brick-and-mortar stores try to tempt customers back

CATEGORY DATA

Table 12 - Sales of Computers and Peripherals by Category: Volume 2017-2022

Table 13 - Sales of Computers and Peripherals by Category: Value 2017-2022

Table 14 - Sales of Computers and Peripherals by Category: % Volume Growth 2017-2022

Table 15 - Sales of Computers and Peripherals by Category: % Value Growth 2017-2022

Table 16 - Sales of Computers by Category: Business Volume 2017-2022

Table 17 - Sales of Computers by Category: Business Value MSP 2017-2022

Table 18 - Sales of Computers by Category: Business Volume Growth 2017-2022

Table 19 - Sales of Computers by Category: Business Value MSP Growth 2017-2022

Table 20 - NBO Company Shares of Computers and Peripherals: % Volume 2018-2022

Table 21 - LBN Brand Shares of Computers and Peripherals: % Volume 2019-2022

Table 22 - Distribution of Computers and Peripherals by Channel: % Volume 2017-2022

Table 23 - Forecast Sales of Computers and Peripherals by Category: Volume 2022-2027

- Table 24 - Forecast Sales of Computers and Peripherals by Category: Value 2022-2027
- Table 25 - Forecast Sales of Computers and Peripherals by Category: % Volume Growth 2022-2027
- Table 26 - Forecast Sales of Computers and Peripherals by Category: % Value Growth 2022-2027
- Table 27 - Forecast Sales of Computers by Category: Business Volume 2022-2027
- Table 28 - Forecast Sales of Computers by Category: Business Value MSP 2022-2027
- Table 29 - Forecast Sales of Computers by Category: Business Volume Growth 2022-2027
- Table 30 - Forecast Sales of Computers by Category: Business Value MSP Growth 2022-2027

In-Car Entertainment in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Downwards trend continues, in line with rising ubiquity of smartphones
 TomTom and Pioneer remain the most notable brands, thanks to their subcategory specialities
 Specialist auto and audio specialists remain the main retailers

PROSPECTS AND OPPORTUNITIES

Further declines expected, due to cannibalisation from smartphones and higher-quality in-car entertainment in new cars
 Declining investment, electric cars, and sustainability concerns add further compounded challenges
 Category set to consolidate among the biggest names due to other players ceasing to invest

CATEGORY DATA

- Table 31 - Sales of In-Car Entertainment by Category: Volume 2017-2022
- Table 32 - Sales of In-Car Entertainment by Category: Value 2017-2022
- Table 33 - Sales of In-Car Entertainment by Category: % Volume Growth 2017-2022
- Table 34 - Sales of In-Car Entertainment by Category: % Value Growth 2017-2022
- Table 35 - NBO Company Shares of In-Car Entertainment: % Volume 2018-2022
- Table 36 - LBN Brand Shares of In-Car Entertainment: % Volume 2019-2022
- Table 37 - Distribution of In-Car Entertainment by Channel: % Volume 2017-2022
- Table 38 - Forecast Sales of In-Car Entertainment by Category: Volume 2022-2027
- Table 39 - Forecast Sales of In-Car Entertainment by Category: Value 2022-2027
- Table 40 - Forecast Sales of In-Car Entertainment by Category: % Volume Growth 2022-2027
- Table 41 - Forecast Sales of In-Car Entertainment by Category: % Value Growth 2022-2027

Home Audio and Cinema in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return to a declining trend, as home audio and cinema is cannibalised by modern devices and streaming services
 Leading players maintain their top places thanks to launches in trending categories, such as soundbars
 Degree of premiumisation expected, while trend for “reliable and repairable” products is also seen

PROSPECTS AND OPPORTUNITIES

Normalisation expected, with an ongoing decline in line with improvements in the quality of built-in television speakers
 Connected soundbars hold potential due to growing trend for connected homes
 Growing use of alternative devices, such as smartphones and wireless speakers, will continue to cannibalise audio

CATEGORY DATA

- Table 42 - Sales of Home Audio and Cinema by Category: Volume 2017-2022
- Table 43 - Sales of Home Audio and Cinema by Category: Value 2017-2022
- Table 44 - Sales of Home Audio and Cinema by Category: % Volume Growth 2017-2022
- Table 45 - Sales of Home Audio and Cinema by Category: % Value Growth 2017-2022

- Table 46 - NBO Company Shares of Home Audio and Cinema: % Volume 2018-2022
- Table 47 - LBN Brand Shares of Home Audio and Cinema: % Volume 2019-2022
- Table 48 - Distribution of Home Audio and Cinema by Channel: % Volume 2018-2022
- Table 49 - Forecast Sales of Home Audio and Cinema by Category: Volume 2022-2027
- Table 50 - Forecast Sales of Home Audio and Cinema by Category: Value 2022-2027
- Table 51 - Forecast Sales of Home Audio and Cinema by Category: % Volume Growth 2022-2027
- Table 52 - Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2022-2027

Home Video in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Organic slowdown in sales as expected, following boosts seen during the time of the pandemic lockdowns
 Further premiumisation expected, with a focus on OLED TVs
 Longer replacement cycles and trend for refurbished goods pose challenges for volume sales

PROSPECTS AND OPPORTUNITIES

No further notable developments in televisions expected at this time, with sales dependent of replacement cycles
 E-commerce and omnichannel offerings set to remain popular
 Video players will continue to decline, as streaming continues to rise in popularity

CATEGORY DATA

- Table 53 - Sales of Home Video by Category: Volume 2017-2022
- Table 54 - Sales of Home Video by Category: Value 2017-2022
- Table 55 - Sales of Home Video by Category: % Volume Growth 2017-2022
- Table 56 - Sales of Home Video by Category: % Value Growth 2017-2022
- Table 57 - Sales of LCD TVs by Network Connectivity: % Retail Volume 2017-2022
- Table 58 - NBO Company Shares of Home Video: % Volume 2018-2022
- Table 59 - LBN Brand Shares of Home Video: % Volume 2019-2022
- Table 60 - Distribution of Home Video by Channel: % Volume 2017-2022
- Table 61 - Forecast Sales of Home Video by Category: Volume 2022-2027
- Table 62 - Forecast Sales of Home Video by Category: Value 2022-2027
- Table 63 - Forecast Sales of Home Video by Category: % Volume Growth 2022-2027
- Table 64 - Forecast Sales of Home Video by Category: % Value Growth 2022-2027
- Table 65 - Forecast Sales of LCD TVs by Network Connectivity: % Retail Volume 2022-2027

Headphones in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

TWS earbuds continue to cannibalise other subcategories
 AirPods maintains its lead, thanks to strong brand loyalty for Apple products
 E-commerce maintains popularity as players offer omnichannel strategies

PROSPECTS AND OPPORTUNITIES

TWS earbuds set to maintain its popularity, with competition in lower-end headphones also expected
 Wireless headbands will continue to lose popularity to TWS earbuds
 More mass entries in TWS earbuds expected over the forecast period

CATEGORY DATA

- Table 66 - Sales of Headphones by Category: Volume 2017-2022
- Table 67 - Sales of Headphones by Category: Value 2017-2022

Table 68 - Sales of Headphones by Category: % Volume Growth 2017-2022

Table 69 - Sales of Headphones by Category: % Value Growth 2017-2022

Table 70 - NBO Company Shares of Headphones: % Volume 2018-2022

Table 71 - LBN Brand Shares of Headphones: % Volume 2019-2022

Table 72 - Distribution of Headphones by Channel: % Volume 2017-2022

Table 73 - Forecast Sales of Headphones by Category: Volume 2022-2027

Table 74 - Forecast Sales of Headphones by Category: Value 2022-2027

Table 75 - Forecast Sales of Headphones by Category: % Volume Growth 2022-2027

Table 76 - Forecast Sales of Headphones by Category: % Value Growth 2022-2027

Imaging Devices in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Declining sales trends in imaging devices continue, due to ongoing cannibalisation from smartphones
As some players leave the category, others invest in specialised models to stand out as “professional”
GoPro maintains its unchallenged lead in digital camcorders

PROSPECTS AND OPPORTUNITIES

Overall declines expected, in line with improvements in smartphone cameras
“Mirrorless” cameras continue to see some opportunities with new launches expected
E-commerce and omnichannel models will continue to grow, with “showrooming” an ongoing trend

CATEGORY DATA

Table 77 - Sales of Imaging Devices by Category: Volume 2017-2022

Table 78 - Sales of Imaging Devices by Category: Value 2017-2022

Table 79 - Sales of Imaging Devices by Category: % Volume Growth 2017-2022

Table 80 - Sales of Imaging Devices by Category: % Value Growth 2017-2022

Table 81 - NBO Company Shares of Imaging Devices: % Volume 2018-2022

Table 82 - LBN Brand Shares of Imaging Devices: % Volume 2019-2022

Table 83 - Distribution of Imaging Devices by Channel: % Volume 2017-2022

Table 84 - Forecast Sales of Imaging Devices by Category: Volume 2022-2027

Table 85 - Forecast Sales of Imaging Devices by Category: Value 2022-2027

Table 86 - Forecast Sales of Imaging Devices by Category: % Volume Growth 2022-2027

Table 87 - Forecast Sales of Imaging Devices by Category: % Value Growth 2022-2027

Mobile Phones in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

Mobile phones continue their declining trend, due to overall saturation and ongoing disruptions in global supply chains
Samsung maintains lead and iPhone maintains brand loyalty, while cheaper android models pose competition in uncertain economic climate
E-commerce remains a strong channel due to convenience

PROSPECTS AND OPPORTUNITIES

Small positive growth expected, although trend for refurbished models may slow down replacement sales
Fierce competition expected, with an anticipated rise of cheaper Chinese brands
E-commerce set to remain strong, while many players embrace omnichannel strategies

CATEGORY DATA

Table 88 - Sales of Mobile Phones by Category: Volume 2017-2022

Table 89 - Sales of Mobile Phones by Category: Value 2017-2022

- Table 90 - Sales of Mobile Phones by Category: % Volume Growth 2017-2022
- Table 91 - Sales of Mobile Phones by Category: % Value Growth 2017-2022
- Table 92 - Sales of Smartphones by Screen Size: % Retail Volume 2019-2022
- Table 93 - NBO Company Shares of Mobile Phones: % Volume 2018-2022
- Table 94 - LBN Brand Shares of Mobile Phones: % Volume 2019-2022
- Table 95 - Distribution of Mobile Phones by Channel: % Volume 2017-2022
- Table 96 - Forecast Sales of Mobile Phones by Category: Volume 2022-2027
- Table 97 - Forecast Sales of Mobile Phones by Category: Value 2022-2027
- Table 98 - Forecast Sales of Mobile Phones by Category: % Volume Growth 2022-2027
- Table 99 - Forecast Sales of Mobile Phones by Category: % Value Growth 2022-2027
- Table 100 - Forecast Sales of Smartphones by Screen Size: % Retail Volume 2022-2027

Portable Players in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Wireless speakers support positive growth in generally declining category
- Amazon and Google take over top places from Bose in wireless speakers
- E-commerce is well suited to see growth in portable players, due to associations and logistical benefits

PROSPECTS AND OPPORTUNITIES

- Smart speakers will continue to support growth in generally declining category
- Multifunctional devices, such as smartphones, will continue to pose a notable threat
- E-commerce set to become a leading retail channel due to myriad benefits for portable players

CATEGORY DATA

- Table 101 - Sales of Portable Players by Category: Volume 2017-2022
- Table 102 - Sales of Portable Players by Category: Value 2017-2022
- Table 103 - Sales of Portable Players by Category: % Volume Growth 2017-2022
- Table 104 - Sales of Portable Players by Category: % Value Growth 2017-2022
- Table 105 - NBO Company Shares of Portable Players: % Volume 2018-2022
- Table 106 - LBN Brand Shares of Portable Players: % Volume 2019-2022
- Table 107 - Distribution of Portable Players by Channel: % Volume 2017-2022
- Table 108 - Forecast Sales of Portable Players by Category: Volume 2022-2027
- Table 109 - Forecast Sales of Portable Players by Category: Value 2022-2027
- Table 110 - Forecast Sales of Portable Players by Category: % Volume Growth 2022-2027
- Table 111 - Forecast Sales of Portable Players by Category: % Value Growth 2022-2027

Wearable Electronics in France

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Positive sales continue, supported by rising popularity of smart wearable for both health and entertainment purposes
- Xiaomi goes from strength to strength to steal top overall place
- E-commerce remains an important channel for wearable electronics

PROSPECTS AND OPPORTUNITIES

- Ongoing positive growth expected, driven by smart wearable trends
- Competitive polarisation expected between premium and lower-priced devices
- E-commerce will prevail, as players embrace omnichannel models to meet all demands

CATEGORY DATA

Table 112 - Sales of Wearable Electronics by Category: Volume 2017-2022
Table 113 - Sales of Wearable Electronics by Category: Value 2017-2022
Table 114 - Sales of Wearable Electronics by Category: % Volume Growth 2017-2022
Table 115 - Sales of Wearable Electronics by Category: % Value Growth 2017-2022
Table 116 - NBO Company Shares of Wearable Electronics: % Volume 2018-2022
Table 117 - LBN Brand Shares of Wearable Electronics: % Volume 2019-2022
Table 118 - Distribution of Wearable Electronics by Channel: % Volume 2017-2022
Table 119 - Forecast Sales of Wearable Electronics by Category: Volume 2022-2027
Table 120 - Forecast Sales of Wearable Electronics by Category: Value 2022-2027
Table 121 - Forecast Sales of Wearable Electronics by Category: % Volume Growth 2022-2027
Table 122 - Forecast Sales of Wearable Electronics by Category: % Value Growth 2022-2027

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-france/report.