



Euromonitor
International

Consumer Electronics in Chile

July 2024

Table of Contents

Consumer Electronics in Chile

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

After two years of strong contraction, sales of computers and peripherals marginally improve

Lenovo launches its new ThinkBook concept, powered by AI

HP retains lead supported by wide product reach and strong distribution network

PROSPECTS AND OPPORTUNITIES

Retail specialisation and omnichannel are the strategies to adopt in this category

Gaming has potential to increase sales of high-end laptops

E-commerce will retain its importance in terms of distribution

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- In-car entertainment continues to decline in Chile
- Rise of smartphones and the incorporation of navigation systems in new cars mean in-car navigation has lost relevance
- Pioneer leads a rapidly declining category

PROSPECTS AND OPPORTUNITIES

- Despite declining demand, some premiumisation could remain
- Regardless of technological limitations, development of innovative products can help overcome stagnation
- Smaller brands will continue to place pressure on major players

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Further declines for home audio and cinema as products are becoming obsolete
- Emerging brands are gaining relevance within products in decline
- Sony regains category lead, narrowly surpassing LG

PROSPECTS AND OPPORTUNITIES

- Increasing connectivity in Chile set to further impact category sales
- Further digitalisation will influence how consumers listen to music

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

After two years of contraction, demand for televisions improves in 2024

Larger format and premium TVs continue to gain ground in Chile

Samsung launches new models, driving the AI era of displays

Samsung retains strong lead of home video, followed by LG

PROSPECTS AND OPPORTUNITIES

Innovation and promotions key elements to drive growth of home video

Players to continue focusing on quality and sustainability

Gamer segment could boost category sales

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Despite stagnation, demand for headphones remains above pre-pandemic levels

TWS earbuds remains most dynamic performer in headphones

AirPods and Xiaomi lead overall headphones with Motorola following at a distance

PROSPECTS AND OPPORTUNITIES

Innovation will remain essential to the future development of TWS earbuds

Promotional strategies will continue to strongly attract consumers

Players set to target omnichannel strategies and identify new avenues of distribution

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Further fall in demand for imaging devices due to competition from smartphones
- Social media is leading the way for Generation Z to become a new consumer group
- Canon retains category lead ahead of GoPro

PROSPECTS AND OPPORTUNITIES

- Action cameras will continue to offer potential for future growth
- Social media is an important tool to boost the category
- Limited shelf space and better range online offers potential for e-commerce

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Demand for smartphones improves following two years of contraction
- Further declines for feature phones due to niche target audience
- Improvements in functionality, capacity, and access to information are key elements within smartphones
- Samsung retains comfortable lead of smartphones despite competition from smaller players

PROSPECTS AND OPPORTUNITIES

- Emerging brands predicted to gain further share
- Social media will continue to increase influence as a vital tool to boost demand for smartphones
- Promotional strategies will continue to strongly attract consumers

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Portable players declines for third consecutive year in both volume and value terms
 High fragmentation in the competitive landscape of portable players
 General merchandise stores remains most relevant distribution channel

PROSPECTS AND OPPORTUNITIES

Portable multimedia players to continue on downwards trajectory
 Smartwatches joins smartphones in threat to topple portable media players
 E-readers becoming obsolete as consumers value digital detox of paper books

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 Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wearable electronics continues growth trajectory, driven by smart wearables
 Apple Watch launches new option capable of measuring glucose levels
 Samsung retains category lead, followed by dynamic performer Xiaomi

PROSPECTS AND OPPORTUNITIES

Smart wearables set to drive growth as consumers value features and designs
 Opportunity for emerging brands where price plays a significant role in purchasing decision
 E-commerce set to consolidate its importance as distribution channel

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-chile/report.