

Consumer Electronics in India

Euromonitor International October 2023

> This sample report is for illustration purposes only. Some content and data have been changed.

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CONSUMER ELECTRONICS IN INDIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer electronics in 2023: The big picture

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for consumer electronics?

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MARKET DATA

| Table 1 | Sales of Consumer Electronics by Category: Volume 2018-2023 | | | | | | |
|---------------|---|------|------|--------------|------------|------|------|
| '000 units | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| Computers and | Peripherals | | Da | ta removed f | rom sample | | |

| In-Car Entertainment In-Home Consumer Electronics Data remove Portable Consumer Electronics Consumer Electronics | ed from sample |
|---|----------------|
|---|----------------|

Table 2 Sales of Consumer Electronics by Category: Value 2018-2023

| | 2023 |
|--|------|
| Computers and PeripheralsIn-Car EntertainmentIn-Home ConsumerElectronicsPortable ConsumerElectronicsConsumer ElectronicsConsumer Electronics | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Consumer Electronics by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|-------------------------|-------------------|---------------|
| Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics | | Data removed from | sample |
| Occurrence of the latence of the set of the | ana anistiana trada are | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Consumer Electronics by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|---------|----------------------|---------------|
| Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics | | Data removed from sa | ample |
| | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5NBO Company Shares of Consumer Electronics: % Volume 2019-2023

% retail volume

| Compar | у | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------|--|--------------------------------------|----------------|------------------|------|------|
| | | | | | | |
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| | I | Data removed from | sample | | | |
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| | | | | | | |
| Source: | Euromonitor International from official sta store checks, trade interviews, trade sou | atistics, trade associations rces | , trade press, | company researcl | 'n, | |

Table 6 LBN Brand Shares of Consumer Electronics: % Volume 2020-2023

| % retail volume Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|--------------------------------|---------------|-------------|------|------|------|
| | Data removed | from sample | | | |
| | | | | | |

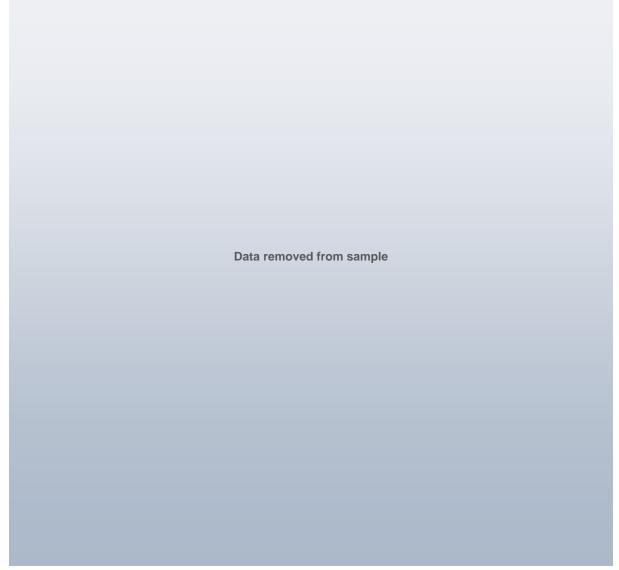


Table 7 Distribution of Consumer Electronics by Channel: % Volume 2018-2023

| Data | a removed fr | om sample | | |
|------|--------------|-----------------|--------------------------|--------------------------|
| | Data | Data removed fr | Data removed from sample | Data removed from sample |

Table 8 Forecast Sales of Consumer Electronics by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|-----------------|------|--------------|-----------|------|------|
| Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics | | Dat | a removed fr | om sample | | |
| | · · · · · · · · | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Consumer Electronics by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|-------------|-----------|------|------|
| Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics | | Data | removed fro | om sample | | |
| | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10Forecast Sales of Consumer Electronics by Category: % Volume Growth 2023-2028

% volume growth

| ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|---|--|-----------------|---------------------------|---------------|
| In-Car I In-Hom Portable | ters and Peripherals Entertainment e Consumer Electronics e Consumer Electronics ner Electronics | | Data removed from | sample |
| Source: | Euromonitor International from trade associations, trade pre trade sources | ss, company res | search, trade interviews, | |

Table 11 Forecast Sales of Consumer Electronics by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|--|------------------|------------------------|---------------|
| Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics | D | ata removed from sa | ample |
| Source: Euromonitor International from trade associations trade o | ress company res | earch trade interviews | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast and scenario closing date: 10 July 2023

Report closing date: 24 October 2023

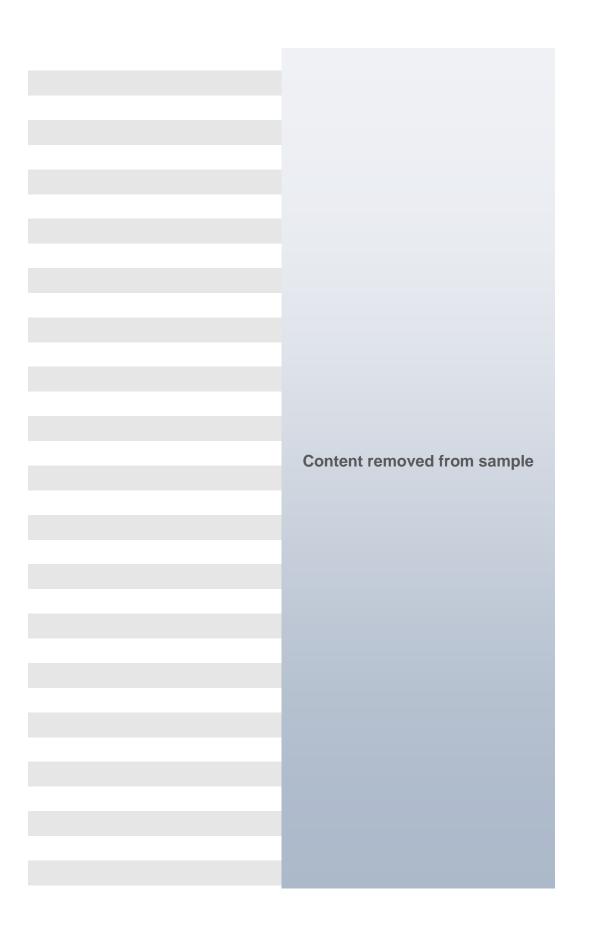
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during research include the following:

| Summary 1 | Research Sources |
|-----------|-------------------------|
| | |

| Trade Associations | |
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| Trade Press | |
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Source: Euromonitor International

COMPUTERS AND PERIPHERALS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Inflationary pressures hinder demand for computers and peripherals

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Growing interest in e-sports drives demand for gaming laptops

Content removed from sample

Indian government restricts imports of desktops and portable computers

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PROSPECTS AND OPPORTUNITIES

Tablets expected to be strongest performer on the back of 5g rollout

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Launch of cheaper laptops supports category growth

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Government initiatives to boost domestic computer manufacturing

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CATEGORY DATA

Table 12

| | • | , , | | | | |
|---|------|------|--------------|------------|------|------|
| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | | Da | ta removed f | rom sample | | |

Sales of Computers and Peripherals by Category: Volume 2018-2023

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Computers and Peripherals by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets | | Data | a removed fr | om sample | | |

| Peripherals - Monitors - Printers Computers and Peripherals | | Data removed from sample |
|--|--|---|
| Source: | Euromonitor International from store checks, trade interviews, | official statistics, trade associations, trade press, company research, trade sources |

Table 14 Sales of Computers and Peripherals by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|---------|---------------------|---------------|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | | Data removed from s | ample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Computers and Peripherals by Category: % Value Growth 2018-2023

% current value growth

| | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|---------|---------------------|---------------|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | ſ | Data removed from s | ample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Computers by Category: Business Volume 2018-2023

| Computers | '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|---------------------------------|------|------|-------------|-------------|------|------|
| - Desktops Data removed from sample - Portable Computers Laptops Tablets | - Portable Computers Laptops | | D | ata removed | from sample | • | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17Sales of Computers by Category: Business Value MSP 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|-----------------------|------------------|-----------------|------------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets | | Da | ta removed fi | rom sample | | |
| Source: Euromonitor International from | official statistics t | rada acconistion | a trado proce o | | h | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Sales of Computers by Category: Business Volume Growth 2018-2023

| % busir | ness volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|--|-------------------|-----------------------|---------------|
| Comput - Deskto - Portab Lapto Table | ops ole Computers ps | C | Data removed from sa | ample |
| Source: | Euromonitor International from official statistics, trade associat store checks, trade interviews, trade sources | tions, trade pres | ss, company research, | |

Table 19 Sales of Computers by Category: Business Value MSP Growth 2018-2023

| % current business value growth msp | 2022/23 | 2018-23 CAGR | 2018/23 Total | | |
|--|---------|--------------|---------------|--|--|
| Computers - Desktops - Portable Computers Laptops Tablets | | sample | | | |
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, | | | | | |

source: Euromonitor international from official statistics, trade associations, trade press, company research store checks, trade interviews, trade sources

Table 20 NBO Company Shares of Computers and Peripherals: % Volume 2019-2023

| % retail volume Company | 2019 | 2020 | 2021 | 2022 | 2023 | | | |
|----------------------------|------|------|------|------|------|--|--|--|
| | | | | | | | | |
| Data removed from sample | | | | | | | | |
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Table 21 LBN Brand Shares of Computers and Peripherals: % Volume 2020-2023

| % retail volume Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|--------------------------------|---------------|-------------|------|------|------|
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Computers and Peripherals by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Uscounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Uter Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Total | | | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Forecast Sales of Computers and Peripherals by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|--------------|-----------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors | | Dat | a removed fr | om sample | | |

- Printers

Computers and Peripherals

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Sales of Computers and Peripherals by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|-------------|----------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | | Data | removed fro | m sample | | |

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 25Forecast Sales of Computers and Peripherals by Category: % Volume Growth2023-2028

% volume growth

trade sources

| | 2023/24 | 2023-28 CAGR | 2023/28 Total | | |
|---|---------|---------------------|---------------|--|--|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | ſ | Data removed from s | ample | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, | | | | | |

Table 26Forecast Sales of Computers and Peripherals by Category: % Value Growth2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|---|-----------|---------------------|---------------|
| Computers - Desktops - Portable Computers Laptops Tablets Peripherals - Monitors - Printers Computers and Peripherals | D | ata removed from sa | ample |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Sales of Computers by Category: Business Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|-------------------|------|-------------|-------------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets | | Da | ata removed | from sample | | |
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Forecast Sales of Computers by Category: Business Value MSP 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|--------------|------------|------|------|
| Computers - Desktops - Portable Computers Laptops Tablets | | Da | ta removed f | rom sample | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, | | | | | | |

trade sources

Table 29 Forecast Sales of Computers by Category: Business Volume Growth 2023-2028

| % busin | iess vo | ume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|--|---------------------|---|--------------|---------------------------|---------------|
| Comput - Deskto - Portab Lapto Table | ops le Con ps | puters | | Data removed from s | ample |
| Source: | | onitor International from trade associations, trade press ources | , company re | search, trade interviews, | |
| Table 30 2028 | 0 | Forecast Sales of Computers by Category: B | usiness Va | alue MSP Growth 2023- | |

% constant business value growth msp

| | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|---|---------|---------------------|---------------|
| Computers - Desktops - Portable Computers Laptops Tablets | | Data removed from s | sample |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

IN-CAR ENTERTAINMENT IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

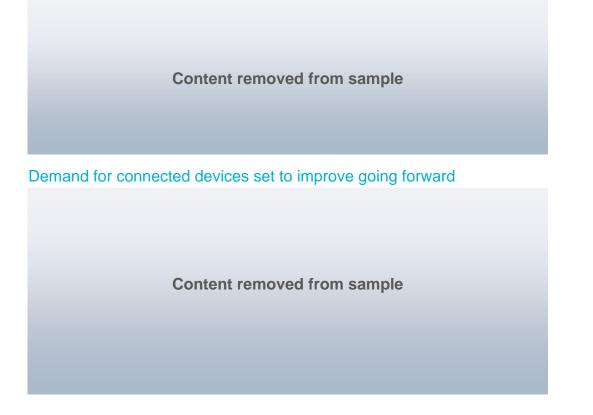
Demand for in-car entertainment continues to decline

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Pioneer corp continues to lead in-car entertainment

PROSPECTS AND OPPORTUNITIES

Smartphones to further challenge sales of in-car entertainment systems



CATEGORY DATA

| Table 31 | Sales of In-Car Enter | n-Car Entertainment by Category: Volume 2018-2023 | | | | | |
|--|-----------------------|---|------|-------------|-------------|------|------|
| '000 units | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| In-Car Navigat In-Car Speake In-Dash Media In-Car Entertai | rs Players | | D | ata removed | from sample | | |
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources | | | | | | | |

Sales of In-Car Entertainment by Category: Value 2018-2023 Table 32

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|-------------|-----------|------|------|
| In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment | | Data | removed fro | om sample | | |

Table 33 Sales of In-Car Entertainment by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|---------|---------------------|---------------|
| In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment | | Data removed from s | ample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Sales of In-Car Entertainment by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|----------------|-----------------------|---------------|
| In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment | ſ | Data removed from s | ample |
| Source: Euromonitor International from official statistics, trade association | ons, trade pre | ss. company research. | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 35 NBO Company Shares of In-Car Entertainment: % Volume 2019-2023

| % retail volume Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------|------------------|-----------|------|------|------|
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Table 36 LBN Brand Shares of In-Car Entertainment: % Volume 2020-2023

| % retail volume Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|--------------------------------|---|---------------------------|--------------|------|------|
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| | | | | | |
| Source: Euromor | itor International from official statistics, trade asso | ciations, trade press, co | mpany resear | ch. | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 Distribution of In-Car Entertainment by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Small Local Grocers General Merchandise Stores Apparel and | | Dat | a removed fr | om sample | | |



Table 38 Forecast Sales of In-Car Entertainment by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | |
|--|------|------|-------------|-------------|------|------|--|
| In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment | | Da | ata removed | from sample | 1 | | |
| Sources Europeanitor International from trade appaciations, trade process company, response trade interviewe | | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 39 Forecast Sales of In-Car Entertainment by Category: Value 2023-2028

| INR million | | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | |
|---|--------------|------|--------------------------|--------|--------------|-----------|------|--|
| In-Car Navigation In-Car Speaker In-Dash Media In-Car Entertair | s Players | | Data removed from sample | | | | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | | | | | | | |
| Table 40 Forecast Sales of In-Car Entertainment by Category: % Volume Growth 2023- 2028 | | | | | | | | |
| % volume grow | th | | 2 | 023/24 | 2023-28 CAGR | 2023/28 T | otal | |

In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 41Forecast Sales of In-Car Entertainment by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|---|-----------|------------------------|---------------|
| In-Car Navigation In-Car Speakers In-Dash Media Players In-Car Entertainment | D | ata removed from sa | Imple |
| Courses Euromonitor International from trade appositional trade pr | | oorob trada intanciawa | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

HOME AUDIO AND CINEMA IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Home audio and cinema devices continue to lose appeal

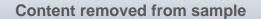
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Rising demand for portable and wireless devices hinders volume sales

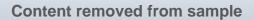
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PROSPECTS AND OPPORTUNITIES

Launch of new technologies to hamper category performance



Demand for premium audio products on the rise



CATEGORY DATA

Table 42Sales of Home Audio and Cinema by Category: Volume 2018-2023

| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | | Data | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Sales of Home Audio and Cinema by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|---------------|------------|------|------|
| - Audio Separates - Digital Media Player | | Dat | ta removed fi | rom sample | | |



Table 44 Sales of Home Audio and Cinema by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|-------------------|------------------------|---------------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | | Data removed from | sample |
| Source: Euromonitor International from official statistics, trade associa | ations, trade pre | ess, company research, | |

store checks, trade interviews, trade sources

Table 45 Sales of Home Audio and Cinema by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|---------|----------------------|---------------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | ſ | Data removed from sa | mple |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 NBO Company Shares of Home Audio and Cinema: % Volume 2019-2023

| % retail volume Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------|----------------|------------|------|------|------|
| | Data removed f | rom sample | | | |

| _ | Data removed f | rom sample | | | | | |
|--|------------------------------------|-----------------|----------|------|------|--|--|
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources | | | | | | | |
| Table 47 LBN | Brand Shares of Home Audio and Cin | ema: % Volume 2 | 020-2023 | | | | |
| % retail volume Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 | | |
| | | | | | | | |
| Data removed from sample | | | | | | | |

Table 48 Distribution of Home Audio and Cinema by Channel: % Volume 2019-2023

| % retail volume | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|----------|--------------|-------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling | | Data rem | oved from sa | ample | |

| - Retail Total | E-Commerce | Data removed from sample |
|-------------------|---|--|
| Source: | Euromonitor International from official statistics, trade store checks, trade interviews, trade sources | e associations, trade press, company research, |

Table 49 Forecast Sales of Home Audio and Cinema by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|-------------|-----------|------|------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | | Data | removed fro | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 50 Forecast Sales of Home Audio and Cinema by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|---------------|-----------|------|------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | | Data | a removed fro | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 51Forecast Sales of Home Audio and Cinema by Category: % Volume Growth2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|---|---------|---------------------|---------------|
| Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema | 1 | Data removed from s | ample |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 52Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2023-2028

| % cons | tant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|--|---|------------------|--------------------------|---------------|
| - Digital - Hi-Fi S - Home - Speak - Other | Separates Media Player Docks Systems Cinema and Speaker Systems ters Home Audio and Cinema Audio and Cinema | D | ata removed from sa | Imple |
| Source: | Euromonitor International from trade associations, trade pr trade sources | ess, company res | earch, trade interviews, | |

HOME VIDEO IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Technological infrastructure and product affordability fuels demand for smart tvs

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Premiumisation trend leads to higher unit prices of lcd tvs

Large-screen televisions continue to gain popularity amongst indian consumers

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PROSPECTS AND OPPORTUNITIES

Home entertainment trend will drive growth of oled tvs

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E-commerce will continue to gain retail share

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Share of locally manufactured televisions to grow in the forecast period

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CATEGORY DATA

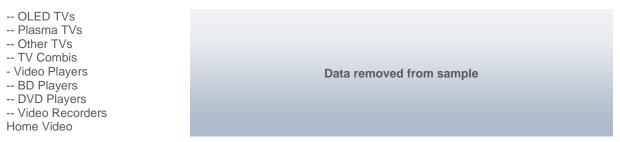
Table 53Sales of Home Video by Category: Volume 2018-2023

| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|---------------|-----------|------|------|
| Televisions Analogue TVs LCD TVs OLED TVs Plasma TVs Other TVs TV Combis Video Players BD Players DVD Players Video Recorders Home Video | | Data | a removed fro | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54Sales of Home Video by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|------|--------------|-----------|------|------|
| - Televisions Analogue TVs LCD TVs | | Dat | a removed fr | om sample | _ | |



Euromonitor International from official statistics, trade associations, trade press, company research, Source: store checks, trade interviews, trade sources

Table 55 Sales of Home Video by Category: % Volume Growth 2018-2023

% volume growth

| 5 |
|---|
| |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Sales of Home Video by Category: % Value Growth 2018-2023 Table 56

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|----------------|----------------------|---------------|
| Televisions Analogue TVs LCD TVs OLED TVs Plasma TVs Other TVs TV Combis Video Players BD Players DVD Players Video Recorders Home Video | | Data removed from s | sample |
| Source: Euromonitor International from official statistics, trade associa | tions trade nr | ess company research | |

Euromonitor International from official statistics, trade associations, trade press, company research, Source: store checks, trade interviews, trade sources



% retail volume

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | |
|---|------|------|-----------|------|------|------|--|
| Internet Smart TVs Non-Internet TVs Total | | Dat | om sample | | | | |
| Source: Furomonitor International from official statistics, trade associations, trade press, company research | | | | | | | |

Table 58 NBO Company Shares of Home Video: % Volume 2019-2023

| % retail volume Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------|-----------------|-----------|------|------|------|
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| | Data removed fr | om sample | | | |
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 LBN Brand Shares of Home Video: % Volume 2020-2023

| % retail volume Brand (GBO) | | | 2021 | 2022 | 2023 |
|--------------------------------|----------------|-------------|------|------|------|
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

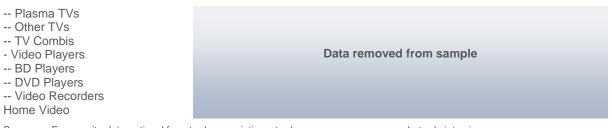
Table 60Distribution of Home Video by Channel: % Volume 2018-2023

| % retail volume 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|--------------|------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Total | | ta removed f | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 Forecast Sales of Home Video by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|--------------|------------|------|------|
| - Televisions Analogue TVs LCD TVs OLED TVs | _ | Da | ta removed f | rom sample | _ | |



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 62 Forecast Sales of Home Video by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|--------------|-----------|------|------|
| Televisions Analogue TVs LCD TVs OLED TVs Plasma TVs Other TVs TV Combis Video Players BD Players DVD Players Video Recorders Home Video | | Data | a removed fr | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 63 Forecast Sales of Home Video by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|--|---------------|--------------------------|---------------|
| Televisions Analogue TVs LCD TVs OLED TVs Plasma TVs Other TVs Other TVs TV Combis Video Players BD Players DVD Players Video Recorders Home Video | ſ | Data removed from s | ample |
| Source: Euromonitor International from trade associations, trade press. | , company res | earch, trade interviews, | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Sales of Home Video by Category: % Value Growth 2023-2028

| % constant value growth | | | |
|-------------------------|-----------|--------------|---------------|
| | 2023/2024 | 2023-28 CAGR | 2023/28 Total |

| Televisions Analogue TVs LCD TVs OLED TVs Plasma TVs Other TVs TV Combis Video Players BD Players DVD Players Video Recorders Home Video | Data removed from sample |
|---|-------------------------------------|
| Source: Euromonitor International from trade associations, trade press, o trade sources | company research, trade interviews, |

Table 65Forecast Sales of LCD TVs by Network Connectivity: % Retail Volume 2023-2028

| % retail | volume | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|----------|---|--------------------------|-----------------|-------------------|------------------|------|------|
| | t Smart TVs ernet TVs | Data removed from sample | | | | | |
| Source: | Euromonitor International from trad trade sources | e associations, t | rade press, com | pany research, ti | rade interviews, | | |

HEADPHONES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

True wireless stereo (tws) earbuds continue to drive growth in headphones

Content removed from sample

Boat continues to lead in headphones by a wide margin

Evolving consumer lifestyles and socioeconomic factors create positive impact

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Headphones will continue to enjoy robust growth in retail volume terms

Content removed from sample

E-commerce to become the dominant channel of distribution in the future

Content removed from sample

Local manufacturing expected to see huge growth in upcoming years

Content removed from sample

Sales of Headphones by Category: Volume 2018-2023

CATEGORY DATA

Table 66

| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|------|--------------|-----------|------|------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones Premium Wireless Earphones - TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | | Dat | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67Sales of Headphones by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|---------------|-----------|------|------|
| Headphones - Wireless Headbands Mass Wireless | | Data | a removed fro | om sample | | |

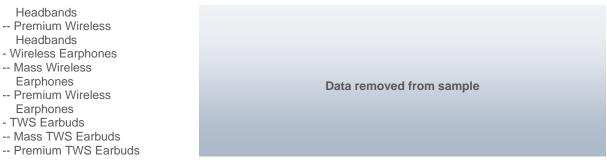


Table 68 Sales of Headphones by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|---------|---------------------|---------------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones Premium Wireless Earphones - TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | | Data removed from s | ample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 Sales of Headphones by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|---------|---------------------|---------------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | | Data removed from s | ample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 NBO Company Shares of Headphones: % Volume 2019-2023

| % retail volume | | | | | |
|-----------------|------|------|------|------|------|
| Company | 2019 | 2020 | 2021 | 2022 | 2023 |

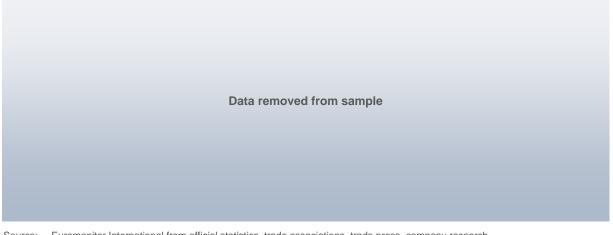


Table 71 LBN Brand Shares of Headphones: % Volume 2020-2023

| % retail volun Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-------------------------------|---------------|-------------|------|------|------|
| | | | | | |
| | | | | | |
| | | | | | |
| | Data removed | from sample | | | |
| | | · | | | |
| | | | | | |
| | | | | | |
| 0 5 | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72Distribution of Headphones by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|------|--------------|------------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets | | Da | ta removed f | rom sample | | |

| Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Total | Data removed from sample |
|---|--------------------------|
|---|--------------------------|

| Table 73 | Forecast Sales of Headphones by Category: Volume 2023-2028 |
|----------|--|
|----------|--|

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|--------------|-----------|------|------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones Premium Wireless Earphones - TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | | Dat | a removed fr | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 74 Forecast Sales of Headphones by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|------------------------------------|------|------|--------------|-----------|------|------|
| Headphones - Wireless Headbands | | Data | a removed fr | om sample | | |

| Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones Premium Wireless Earphones - TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | Data removed from sample |
|--|--------------------------|
|--|--------------------------|

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 75 Forecast Sales of Headphones by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|--|---------|---------------------|---------------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones Premium Wireless Earphones - TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | D | ata removed from sa | mple |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 76 Forecast Sales of Headphones by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|--|-----------|---------------------|---------------|
| Headphones - Wireless Headbands Mass Wireless Headbands Premium Wireless Headbands - Wireless Earphones Mass Wireless Earphones TWS Earbuds Mass TWS Earbuds Premium TWS Earbuds | D | ata removed from sa | ample |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

IMAGING DEVICES IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Imaging devices continue to witness decline in retail volume terms

Content removed from sample

Mirrorless cameras continue to gain popularity amongst consumers

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Imaging devices to face further demise

Content removed from sample

Unit prices expected to rise amid developments in high-end models

Content removed from sample

CATEGORY DATA

| Table 77 | Sales of Imaging Devices by Category: Volume 2018-2023 | | | | | | |
|----------------|--|---------------|--------------------|------------------|----------------|------|------|
| '000 units | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| - Digital Came | Digital Cameras Digital Camcorders maging Devices Data removed from sample | | | | | | |
| | onitor International from offic hecks, trade interviews, trad | | le associations, t | trade press, com | pany research, | | |
| Table 78 | Sales of Imaging Devi | ces by Catego | ory: Value 201 | 8-2023 | | | |
| INR million | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|---------------|-------------|------|------|
| - Digital Cameras - Digital Camcorders | | Da | ita removed f | from sample | | |

| Imaging Devices | Da | ata remove | ed from sample | | | |
|--|--|---|---------------------------------------|----------|---------|--|
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources | | | | | | |
| Table 79 Sales of Imaging I | Devices by Category: % Volu | ume Growt | h 2018-2023 | | | |
| % volume growth | | 2022/23 | 2018-23 CAGR | 2018/23 | 3 Total | |
| - Digital Cameras - Digital Camcorders Imaging Devices | | I | Data removed from | n sample | | |
| Source: Euromonitor International from store checks, trade interviews | n official statistics, trade association trade sources | ons, trade pre | ss, company research, | | | |
| Table 80 Sales of Imaging I | Devices by Category: % Valu | ue Growth | 2018-2023 | | | |
| % current value growth | | 2022/23 | 2018-23 CAGR | 2018/23 | 3 Total | |
| - Digital Cameras - Digital Camcorders Imaging Devices | | | Data removed fron | n sample | | |
| | n official statistics, trade associatio , trade sources | ons, trade pre | ss, company research, | | | |
| | | | | | | |
| Table 81 NBO Company Sh | nares of Imaging Devices: % | Volume 20 | 019-2023 | | | |
| Table 81 NBO Company Sh % retail volume Company | nares of Imaging Devices: % 2019 | Volume 20 2020 | 2021 2021 | 2022 | 2023 | |
| % retail volume | | | | 2022 | 2023 | |
| % retail volume | | 2020 | | 2022 | 2023 | |
| % retail volume | 2019 | 2020 | | 2022 | 2023 | |
| % retail volume Company | 2019 Data removed from official statistics, trade association | 2020 n sample | 2021 | 2022 | 2023 | |
| % retail volume Company Source: Euromonitor International from store checks, trade interviews | 2019 Data removed from official statistics, trade association | 2020 n sample | 2021 ss, company research, | 2022 | 2023 | |
| % retail volume Company Source: Euromonitor International from store checks, trade interviews Table 82 LBN Brand Shares % retail volume | 2019 Data removed from | 2020 n sample | 2021 ss, company research, | 2022 | 2023 | |
| % retail volume Company Source: Euromonitor International from store checks, trade interviews Table 82 LBN Brand Shares % retail volume | 2019 Data removed from a official statistics, trade association trade sources as of Imaging Devices: % Vol | 2020 n sample ons, trade pre ume 2020- 2020 | 2021 ss, company research, 2023 | | | |
| % retail volume Company Source: Euromonitor International from store checks, trade interviews Table 82 LBN Brand Shares % retail volume | 2019 Data removed from official statistics, trade association trade sources s of Imaging Devices: % Vol | 2020 n sample ons, trade pre ume 2020- 2020 | 2021 ss, company research, 2023 | | | |

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 83 Distribution of Imaging Devices by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Retail E-Commerce Total | | Dat | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 84 Forecast Sales of Imaging Devices by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|--------------|------------|------|------|
| - Digital Cameras - Digital Camcorders Imaging Devices | | Da | ta removed f | rom sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Source:

trade sources

trade sources

Table 85Forecast Sales of Imaging Devices by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | |
|---|------------------|--------------|------------|-------------------|--------|------|--|
| Digital Cameras Digital Camcorders Digital Camcorders Data removed from sample Data removed from sample | | | | | | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | | | | | | |
| Table 86 Forecast Sales of | f Imaging Device | s by Categor | y: % Volum | ne Growth 2023-20 | 28 | | |
| % volume growth 2023/24 2023-28 CAGR 2023/28 Total | | | | | | | |
| - Digital Cameras - Digital Camcorders Imaging Devices | | | D | ata removed from | sample | | |

Euromonitor International from trade associations, trade press, company research, trade interviews,

Table 87 Forecast Sales of Imaging Devices by Category: % Value Growth 2023-2028

 % constant value growth
 2023/2024
 2023-28 CAGR
 2023/28 Total

 - Digital Cameras
 - Digital Camcorders
 Data removed from sample

 Source:
 Euromonitor International from trade associations, trade press, company research, trade interviews,

MOBILE PHONES IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Mobile phones face further decline in volume sales

Content removed from sample

Consumers attracted to 5g-enabled smartphones

Content removed from sample

Government schemes positively impact domestic smartphone manufacturing

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Demand for technologically advanced and premium smartphones to rise

Content removed from sample

Feature phones will continue to lose favour amongst indian consumers

Content removed from sample

Foldable smartphones to gain popularity in the forecast period

Content removed from sample

CATEGORY DATA

| Table 8 | 8 \$ | Sales of Mobile Ph | Phones by Category: Volume 2018-2023 | | | | | |
|---------------------------------|------|---|--------------------------------------|-------------------|--------------------|-----------------|------|------|
| '000 uni | its | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| - Featur - Smart Mobile I | | S | | Dat | a removed fi | om sample | | |
| Source: | | itor International from ecks, trade interviews, | | trade associatior | ns, trade press, c | company researd | ch, | |

Table 89Sales of Mobile Phones by Category: Value 2018-2023

INR million

| | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | |
|--|--|--|--------------|-----------------|-------------------|------------|----------|--|
| Feature Phor Smartphones Mobile Phones | 5 | | Da | ata removeo | I from sample | | | |
| | onitor International fro hecks, trade interview | om official statistics, tra vs, trade sources | ide associat | ions, trade pre | ss, company resea | rch, | | |
| Table 90 Sales of Mobile Phones by Category: % Volume Growth 2018-2023 | | | | | | | | |
| % volume grov | vth | | | 2022/23 | 2018-23 CAG | R 2018/2 | 23 Total | |
| Feature Phor Smartphones Mobile Phones | 5 | | | | Data removed f | rom sample | | |
| | onitor International fro hecks, trade interview | om official statistics, tra /s, trade sources | ade associat | ions, trade pre | ss, company resea | rch, | | |
| Table 91 | Sales of Mobile I | Phones by Catego | ry: % Valu | e Growth 20 | 18-2023 | | | |
| % current valu | e growth | | | 2022/23 | 2018-23 CAG | R 2018/2 | 23 Total | |
| Feature Phor Smartphones Mobile Phones | Data removed from sample | | | | | | | |
| | onitor International fro hecks, trade interview | om official statistics, tra vs, trade sources | ide associat | ions, trade pre | ss, company resea | rch, | | |
| Table 92 | Sales of Smartph | nones by Screen S | ize: % Re | tail Volume : | 2020-2023 | | | |
| % retail volum | e | | 2020 | 2 | 021 | 2022 | 2023 | |
| <4.7 inch 4.7 inch - 5.49 >= 5.5 inch | inch | | | Data | removed from | sample | | |
| | onitor International fro hecks, trade interview | om official statistics, tra s, trade sources | ade associat | ions, trade pre | ss, company resea | rch, | | |
| Table 93 | NBO Company S | Shares of Mobile P | hones: % | Volume 201 | 9-2023 | | | |
| % retail volum Company | 9 | | 2019 | 2020 | 2021 | 2022 | 2023 | |
| | | | | | | | | |
| | | Data ren | noved fro | m sample | | | | |
| | | | | | | | | |

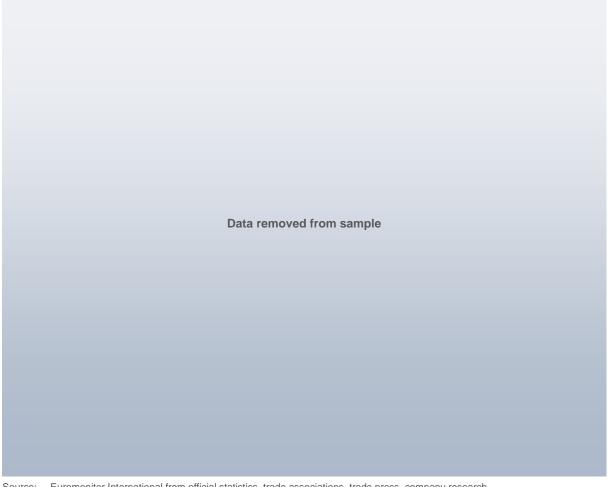


Table 94 LBN Brand Shares of Mobile Phones: % Volume 2020-2023

| % retail volume Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|--------------------------------|-------------------|----------|------|------|------|
| | | | | | |
| | | | | | |
| | Data removed from | n sample | | | |
| | | | | | |
| | | | | | |

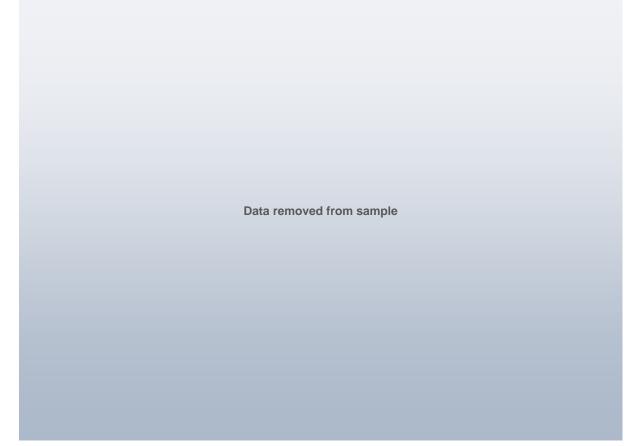


Table 95Distribution of Mobile Phones by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products | | Data | a removed fr | om sample | | |

| Specialists Data removed from sample Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Total Data removed from sample | |
|--|--|
|--|--|



| '000 uni | its | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|---|------|------|------|------|------|------|
| Feature Phones Smartphones Mobile Phones | | | | | | | |
| Source: | ce: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | | | | | |

Table 97 Forecast Sales of Mobile Phones by Category: Value 2023-2028

| INR mil | lion | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---------|---|------|------|-------------|----------|------|------|
| - Smart | re Phones phones Phones | | Data | removed fro | m sample | | |
| Source: | ce: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | | | | | |

Table 98 Forecast Sales of Mobile Phones by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|--|--------------------|--------------------------|---------------|
| - Feature Phones - Smartphones Mobile Phones | | Data removed from | sample |
| Source: Euromonitor International from trade associations, trade trade sources | press, company res | earch, trade interviews, | |

Table 99 Forecast Sales of Mobile Phones by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

| - Feature Phones - Smartphones Mobile Phones | | | Data r | emoved from | sample | |
|---|---------------|----------------|----------------|--------------|--------|------|
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | | | | | |
| Table 100 Forecast Sales of Sma | rtphones by S | Screen Size: % | % Retail Volur | ne 2023-2028 | 6 | |
| % retail volume | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| <4.7 inch 4.7 inch - 5.49 inch >= 5.5 inch Total | | Data | a removed fr | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

PORTABLE PLAYERS IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Wireless speakers are the only bright spot in a declining category

Content removed from sample

Rising popularity of smart speakers drives growth in wireless speakers

Content removed from sample

Amazon.com inc continues to lead in portable players

Content removed from sample

PROSPECTS AND OPPORTUNITIES

E-readers face tough competition as devices lose appeal

Content removed from sample

E-commerce channel to gain retail volume share going forward

CATEGORY DATA

| | Table 101 | Sales of Portable Players by Category: Volume 2018-2023 |
|--|-----------|---|
|--|-----------|---|

| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | | Data | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 102 Sales of Portable Players by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|-----------|------|------|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | | Data | a removed fr | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 103 Sales of Portable Players by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|---|-----------------|-------------------------|---------------|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | | Data removed from s | sample |
| Source: Euromonitor International from official statistics, trade associa | ations, trade p | ress, company research. | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 104 Sales of Portable Players by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total | |
|------------------------|--------------------------|--------------|---------------|--|
| - E-Readers | Data removed from sample | | | |

| Porta Other - Wirele | ole Media Players ble Multimedia Players [.] Portable Media Players ess Speakers e Players | Data removed from sample |
|----------------------------|---|------------------------------------|
| Source: | Euromonitor International from official statistics, trade associatio store checks, trade interviews, trade sources | ns, trade press, company research, |

Table 105 NBO Company Shares of Portable Players: % Volume 2019-2023

| % retail Compar | | | | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------|-----------------|---------------------|-----------------------|----------------|--------------------|----------------|------|------|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | Data rem | oved from | sample | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Source: | Euromonitor Int | ernational from off | icial statistics, tra | de association | s, trade press, co | ompany researc | ch. | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 LBN Brand Shares of Portable Players: % Volume 2020-2023

| Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|---------------|-------------|--------------------|------|------|
| | | | | |
| | | | | |
| | | | | |
| Data removed | from sample | | | |
| | | | | |
| | | | | |
| | | | | |
| | | Company (NBO) 2020 | | |

| | Data removed from sample |
|---------|--|
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources |

Table 107 Distribution of Portable Players by Channel: % Volume 2018-2023

| Retail Offline - Retail Offline - Grocery Retailers Convenience Retail Supermarkets Hypermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Other Non-Grocery Retailers | % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|--|------|------|------|------|------|------|
| Total | Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling Retail E-Commerce Total | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 108 Forecast Sales of Portable Players by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|------|------|--------------|------------|------|------|
| - E-Readers - Portable Media Players | | Da | ta removed f | rom sample | | |



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 109 Forecast Sales of Portable Players by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | |
|--|------|------|--------------|-----------|------|------|--|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | | Dat | a removed fr | om sample | | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews | | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 110 Forecast Sales of Portable Players by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total | | | |
|---|---------|---------------------|---------------|--|--|--|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | | Data removed from s | ample | | | |
| Source: Euromonitor International from trade associations, trade press, company research, trade interviews, | | | | | | |

trade sources

Table 111 Forecast Sales of Portable Players by Category: % Value Growth 2023-2028

| | % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|---|--|-----------|---------------------|---------------|
| E-Readers Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers Portable Players | Portable Media Players Portable Multimedia Players Other Portable Media Players Wireless Speakers | D | ata removed from sa | Imple |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

WEARABLE ELECTRONICS IN INDIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Declining unit prices and rising health concerns fuel growth of wearable electronics

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Noise continues to lead wearable electronics in india

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Activity bands lose favour among indian consumers

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PROSPECTS AND OPPORTUNITIES

Growing importance of health tracking and rising smartphone penetration to drive category growth

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E-commerce to remain a dominant distribution channel

Wearable devices to evolve from technological advancements and design



CATEGORY DATA

Table 112 Sales of Wearable Electronics by Category: Volume 2018-2023

| '000 units | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|------|---------------|-----------|------|------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data | a removed fro | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 Sales of Wearable Electronics by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|------|------|---------------|-----------|------|------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data | a removed fro | om sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 114 Sales of Wearable Electronics by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|---------|---------------------|---------------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data removed from s | sample |
| | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 115 Sales of Wearable Electronics by Category: % Value Growth 2018-2023

| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|--|--|---------|---------------------|---------------|
| | Activity Bands Activity Watch (Analogue) Activity Watch (Digital) - Smart Wearables | | Data removed from s | sample |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 116 NBO Company Shares of Wearable Electronics: % Volume 2019-2023

| % retail volume Company | | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------|------------|--------------|------|------|------|------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | Data remov | ved from sai | mple | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 117 LBN Brand Shares of Wearable Electronics: % Volume 2020-2023



Table 118 Distribution of Wearable Electronics by Channel: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|------|------|--------------|------------|------|------|
| Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending | | Dat | ta removed f | rom sample | | |

| | t Selling E-Commerce | Data removed from sample |
|---------|--|--|
| Source: | Euromonitor International from offici store checks, trade interviews, trade | al statistics, trade associations, trade press, company research, e sources |

Table 119 Forecast Sales of Wearable Electronics by Category: Volume 2023-2028

| '000 units | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|---------------|-----------|------|------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data | a removed fro | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 120 Forecast Sales of Wearable Electronics by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|--|------|------|---------------|-----------|------|------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data | a removed fro | om sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 121Forecast Sales of Wearable Electronics by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|--|---------|-------------------------------|---------------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | | Data removed from s | ample |
| Occurrent Experience it and the section of factors the decision of the section of | | a such the destruction of the | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 122Forecast Sales of Wearable Electronics by Category: % Value Growth 2023-2028

% constant value growth

| | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|--|-----------|----------------------|---------------|
| Activity Wearables Activity Bands Activity Watch (Analogue) Activity Watch (Digital) Smart Wearables Wearable Electronics | D | Pata removed from sa | ample |
| | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources