Hans-Joachim Kamp

Chairman of the supervisory board of gfu

Global Market for Technical Consumer Goods

Development first half year 2019

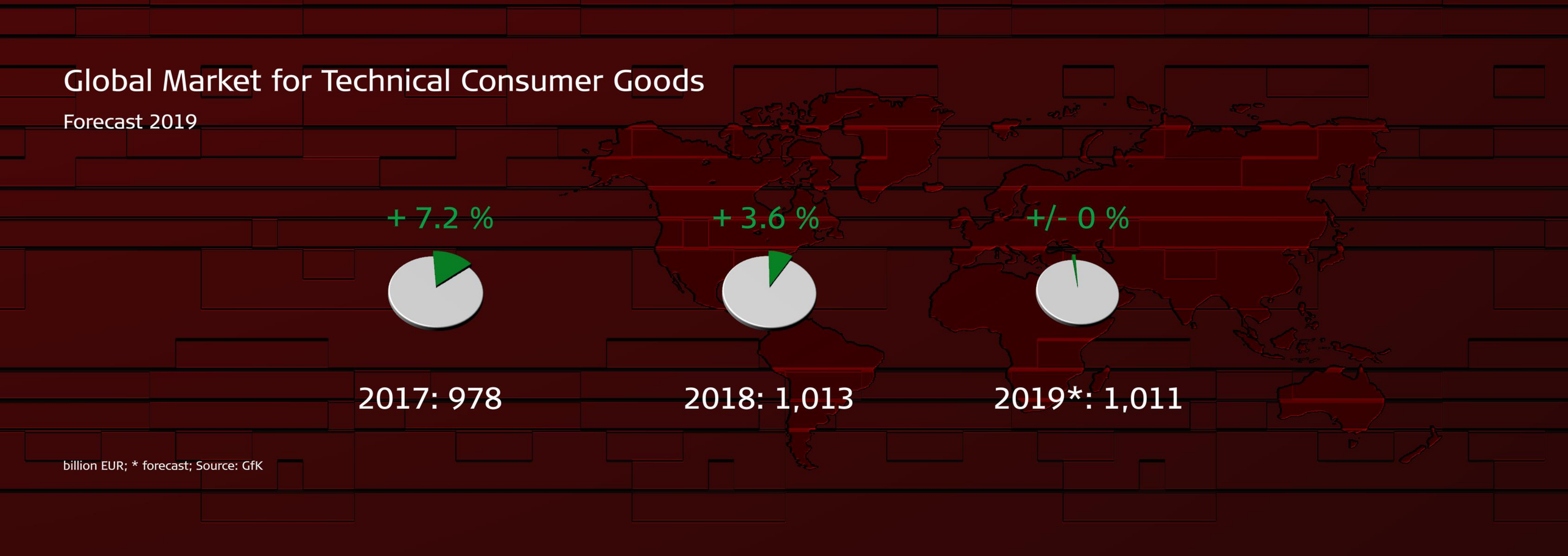
1. HY 2019: 450 bn Euro



billion EUR; Source: GfK

Global Market for Technical Consumer Goods

Forecast 2019



billion EUR; * forecast; Source: GfK

Global Market for Consumer Electronics

Share of product groups, forecast and growth



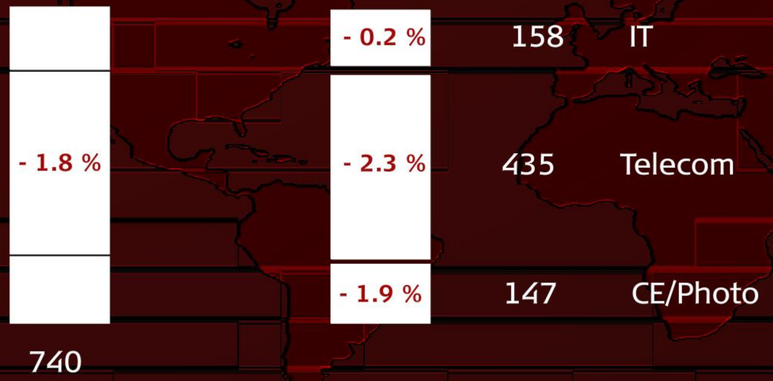
740

Consumer Electronics total

billion EUR; fixed currancy; Source: GfK

Global Market for Consumer Electronics

Share of product groups, forecast and growth



billion EUR; fixed currancy; Source: GfK

Global Market for Consumer Electronics

Regional split and growth; forecast 2019

China	27 %	- 3 %
Developed Asia	10 %	+/- 0 %
Emerging Asia w.o. China	8 %	+ 3 %
Europe	25 %	- 2 %
North America	19 %	- 2 %
LATAM	7 %	- 5 %
Middle East & Africa	7 %	- 1 %

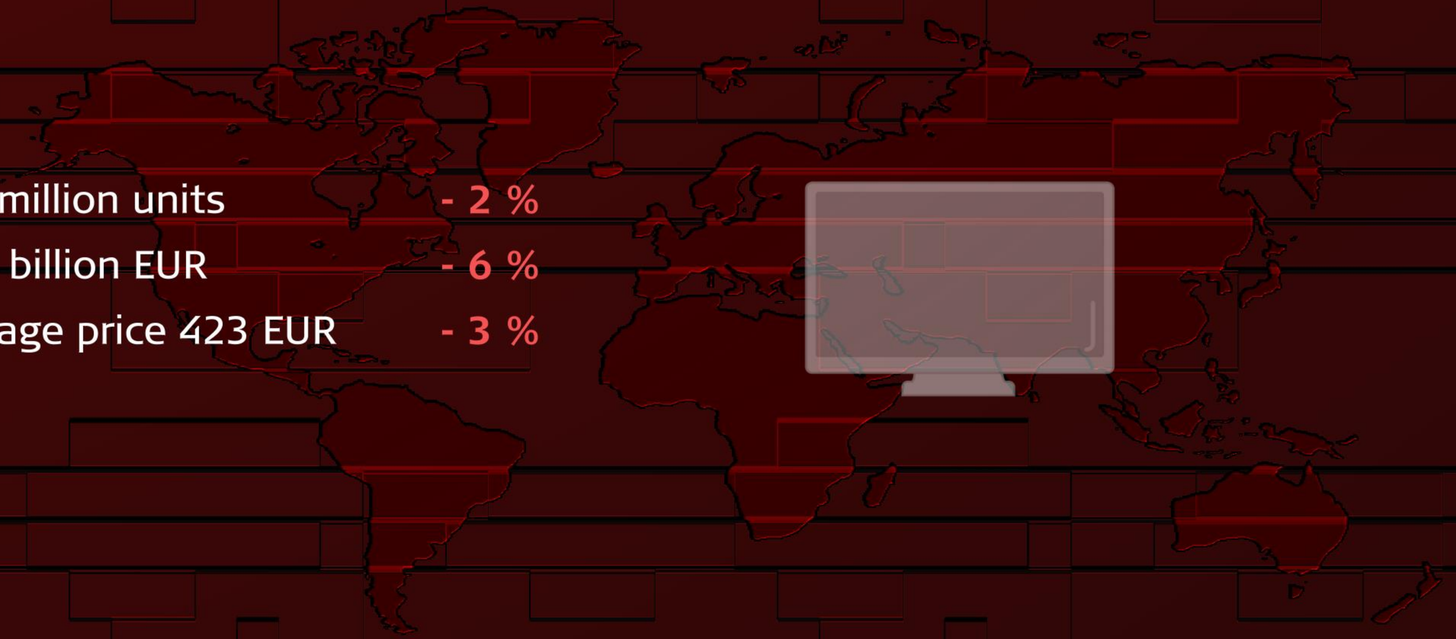


Source: GfK

Consumer Electronics Market

Global Market TV sets

Total turnover TV sets forecast 2019:	208 million units	- 2 %
	87.8 billion EUR	- 6 %
	Average price 423 EUR	- 3 %

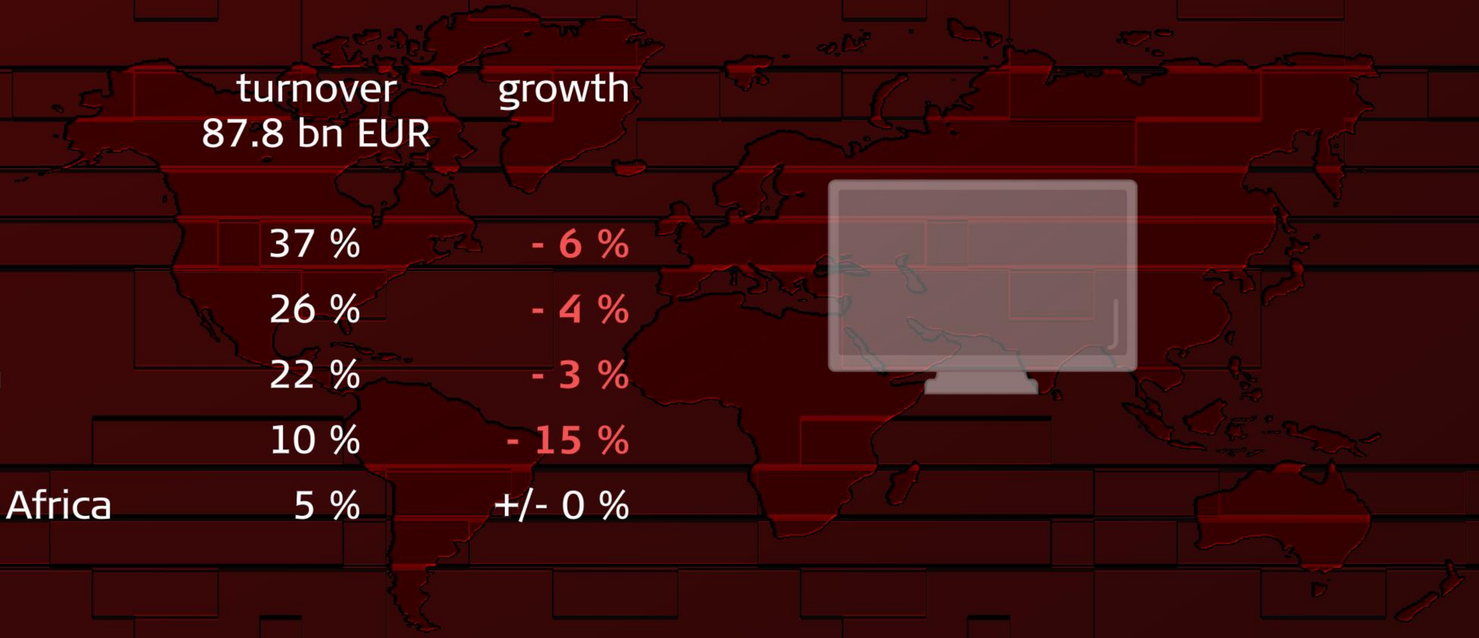


Source: GfK

Consumer Electronics Market

Global Market TV sets

	turnover 87.8 bn EUR	growth
Asia	37 %	- 6 %
Europe	26 %	- 4 %
North America	22 %	- 3 %
LATAM	10 %	- 15 %
Middle East & Africa	5 %	+/- 0 %



Forecast 2019 regional split and growth; Source: GfK

Consumer Electronics Market

Global Market TV sets

	208 mn units	growth
Asia	39 %	- 2 %
Europe	24 %	+ 1 %
North America	22 %	- 1 %
LATAM	10 %	- 15 %
Middle East & Africa	6 %	- 1 %



Forecast 2019 regional split and growth; Source: GfK

Consumer Electronics Market

Global Market TV sets

	Average price	
Asia	404	- 4 %
Europe	448	- 5 %
North America	432	- 2 %
LATAM	431	+/- 0 %
Middle East & Africa	391	+ 1 %



Forecast 2019 regional split and growth; Source: GfK

Consumer Electronics Market

Global Market TV sets

Shares by screen size	2016	2019
up to 34 inch	20 %	15 %
35 – 44 inch	24 %	18 %
45 – 49 inch	15 %	9 %
50 – 59 inch	29 %	35 %
60 – 69 inch	10 %	17 %
70+ inch	2 %	6 %

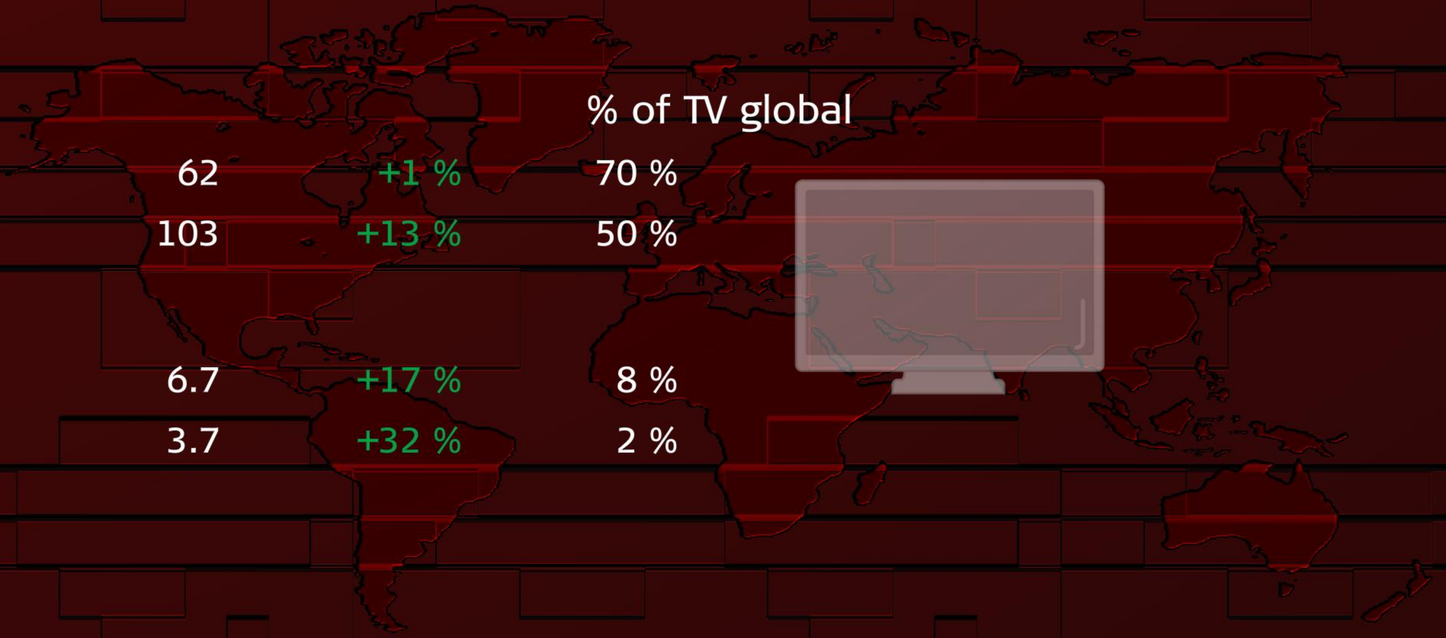


% value; Source: GfK

Consumer Electronics Market

Global Market TV sets

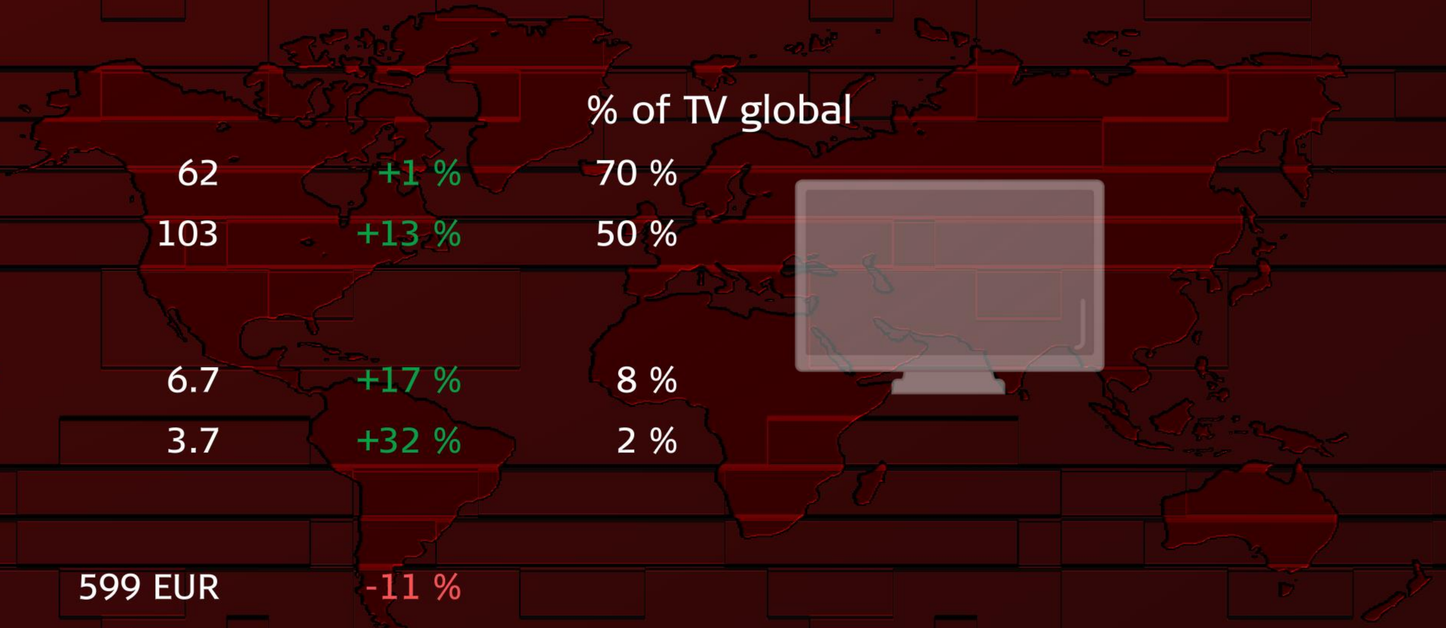
UHD TV sets			% of TV global
Value bn EUR 2019*	62	+1 %	70 %
Million units	103	+13 %	50 %
OLED TV sets			
Value bn EUR 2019*	6.7	+17 %	8 %
Million units	3.7	+32 %	2 %



Forecast 2019; Source: GfK

Consumer Electronics Market

Global Market TV sets



UHD TV sets			% of TV global
Value bn EUR 2019*	62	+1 %	70 %
Million units	103	+13 %	50 %
OLED TV sets			
Value bn EUR 2019*	6.7	+17 %	8 %
Million units	3.7	+32 %	2 %
Average price			
UHD TV	599 EUR	-11 %	
OLED TV	1806 EUR	-11 %	

Forecast 2019; Source: GfK

Consumer Electronics Market

Global Market Smartphones

	2017	2018	2019*	
Value bn EUR	426	445	435	- 2 %
Billion units	1.463	1.407	1.381	- 1 %
Average price EUR	291	316	315	

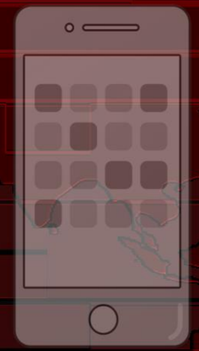


*Forecast 2019; Source: GfK

Consumer Electronics Market

Global Market Smartphones

	value share	growth	average price
Asia	50 %	- 1 %	309
Europe	17 %	- 5 %	356
North America	16 %	- 2 %	460
LATAM	8 %	- 4 %	254
Middle East & Africa	9 %	- 1 %	216

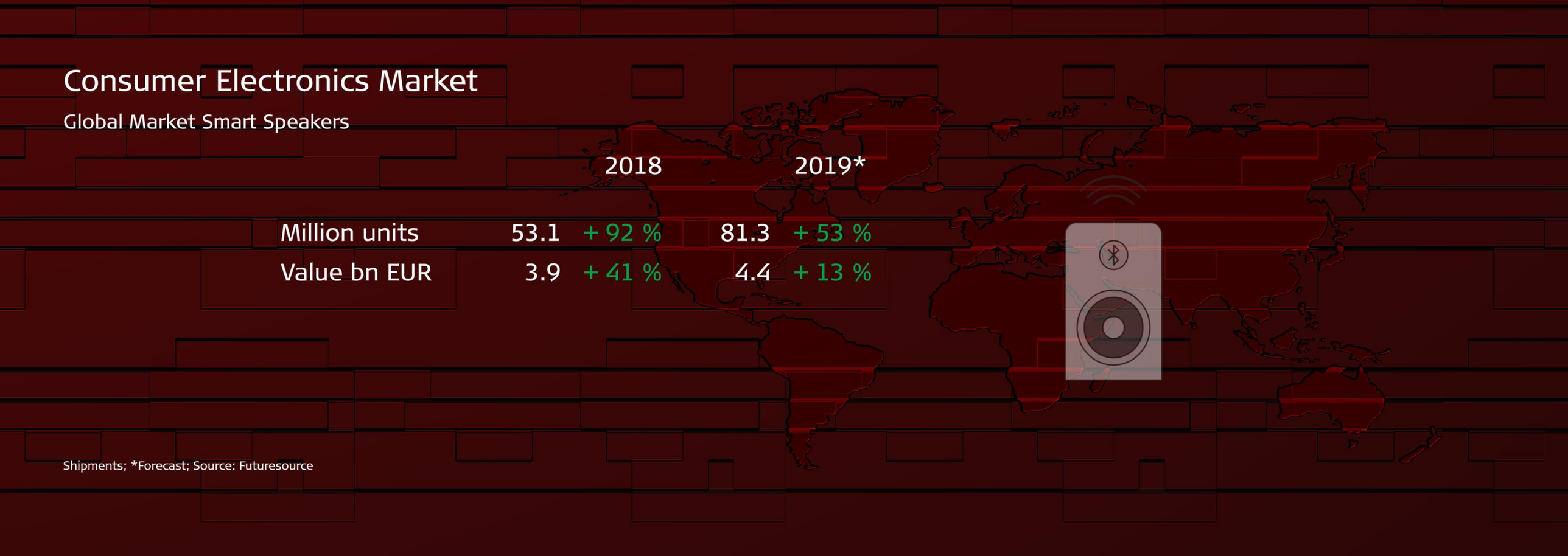


Forecast 2019; Source: GfK

Consumer Electronics Market

Global Market Smart Speakers

	2018		2019*	
Million units	53.1	+ 92 %	81.3	+ 53 %
Value bn EUR	3.9	+ 41 %	4.4	+ 13 %



Shipments; *Forecast; Source: Futuresource

Consumer Electronics Market

Global Market Smart Speakers 2019*

	turnover in bn EUR	growth	mn units	growth
Asia Pacific	0.854	+ 44 %	28.6	+ 110 %
Europe	0.899	+ 21 %	10.4	+ 46 %
USA	2.576	+ 2 %	41.4	+ 29 %
Rest of world	0.084	+ 110 %	1.0	+ 150 %
total	4.4		81.3	



Shipments; *Forecast; Source: Futuresource

Consumer Electronics Market

Global Market Smart Speakers 2019*

	Average price EUR
total	54
Asia Pacific	30
Europe	86
USA	62
Rest of world	84

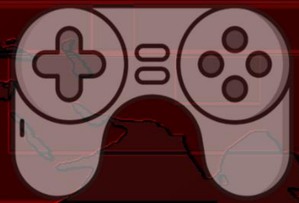


Shipments; *Forecast; Source: Futuresource

Consumer Electronics Market

Global Market Gaming Hardware

	value billion EUR	growth
Notebook	3.072	+ 12.5 %
Desktop	0.476	- 3.9 %
Monitor	1.035	+ 42.1 %
Keyboard	0.216	+ 5.5 %
Mouse	0.231	+ 9.1 %
Headset	0.342	+ 3.7 %
Total PC Gaming Hardware	5.371	+ 14.3 %

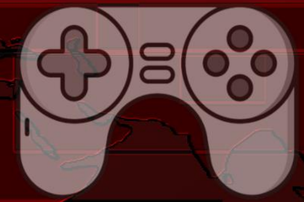


Jan – Jun 2019; Source: GfK; without North America

Consumer Electronics Market

Global Market Gaming Hardware

	value billion EUR	growth
Expectation Total PC Gaming Hardware 2019	12.4	+ 14 %



Source: GfK; without North America

Consumer Electronics Market

IFA takes place at the right time

Consumer Electronics Market

IFA takes place at the right time

IFA provides strong impetus to the markets

Consumer Electronics Market

IFA takes place at the right time

IFA provides strong impetus to the markets

IFA generates a huge global media coverage

Consumer Electronics Market

IFA takes place at the right time

IFA provides strong impetus to the markets

IFA generates a huge global media coverage

IFA is a huge order platform with more than
4.7 billion Euro of purchase volume