

Two companies currently control the global home audio market, Futuresource reports-- Amazon and Harman/JBL, with the two taking first and second place respectively in the Q4 2018 home audio shipment rankings.



“Amazon regained its position as the leading home audio vendor in terms of quarterly shipments, wrestling the crown from Harman/JBL, which dropped into 2nd place,” the analyst says. “However, Harman/JBL’s strong performance between Q1 and Q3 was enough for it to achieve top home audio vendor for full year 2018. In revenue terms, Harman/JBL, Bose, Sony and Sonos led the pack consistently throughout the year.”

In number terms, Q4 2018 home audio shipments total 59 million units, a 20% Y-o-Y increase, bringing revenues worth \$6.8 billion. The market continues to trend positive, although volume growth outpaces value growth in most segments, as it retains "huge appeal" for consumers with no signs of waning, at least as yet.

Products with integrated voice assistant show 41.8% Y-o-Y shipment growth across all categories, up from 27.5% Y-o-Y in Q4 2017. Smart speaker shipments are up by 78.7% Y-o-Y, while soundbars achieve 6.3% Y-o-Y volume growth, the only category to see value outperform volume, up 11.3% Y-o-Y.

In geographic terms, China leads in terms of growth, followed by Russia with 31% growth. Regionally, if one removes China from proceedings, E. Europe is the region with highest growth at 19.4% Y-o-Y. W. Europe sees 73% Y-o-Y growth in smart speakers, but combining all product shipments brings W. European to just 2%. This is in part due to "unusually high" shipments in some countries in Q3 2018.

Futuresource: Amazon and Harman Wrestle for Audio Domination

Written by Alice Marshall
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