

REED
ELECTRONICS
RESEARCH

THE YEARBOOK OF WORLD ELECTRONICS DATA

Components
Computers
Consumer
Control and Instrumentation
Medical and Industrial
Office Equipment
Radio Communications
Telecommunications

Volume One
WEST EUROPE

2025

Yearbook of World Electronics Data Volume 1 2025 – An Overview of Electronics Production & Markets in Western Europe

Introduction

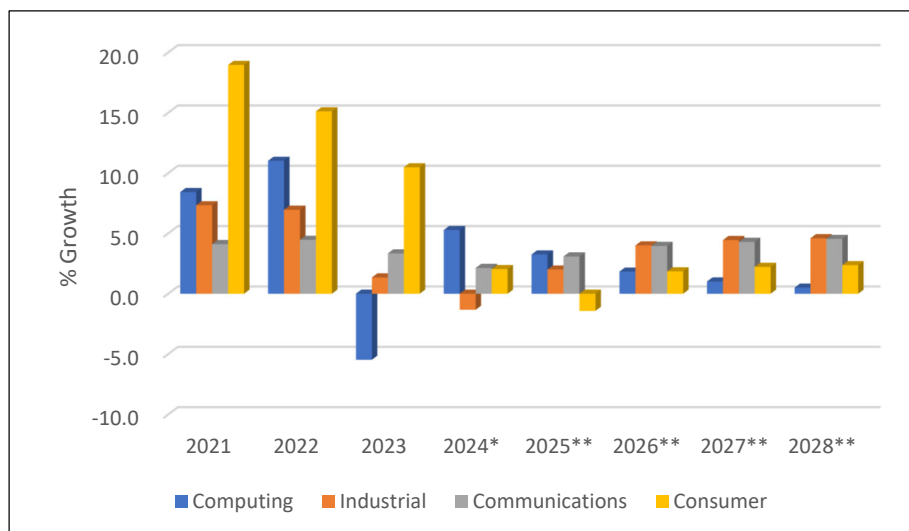
In providing the forecasts for the current study, which were made at the end of July/beginning of August, we have:

- Taken into accounts developments in the European and global economy, and the on-going impact of tariffs on growth.
- That the impact of inventory balancing across several segments and notably industrial eased over the final months of 2024 with orders normalising in the first half of 2025.
- Component prices and shortages normalised in 2024 although tariffs have put pressure on prices in 2025.
- Consumer spending will remain subdued due to the combination of higher inflation and on-going geopolitical uncertainty.
- AI and data centre consumption will be a key driver of growth in the overall computer market in 2025 and 2026. We also expect demand to feed through to higher computer equipment production.

As a result, we expect growth in the European electronics industry to strengthen in the second half of 2025 and then gain momentum over the period to 2028. However, as in previous years significant downside risks remain which could still push a sustained recovery into the first quarter of 2026.

In Euro's the production of electronic equipment in Western Europe increased by an estimated 0.2% in 2024 to Euro 131.2 billion, down from growth of 1.7% in the prior year, growth in the computing and communications segments – primarily radar and navigation/defence – offsetting falling industrial output.

Based on current indicators we are forecasting that growth in electronic equipment output in Western Europe will increase by 2.2% in 2025, 3.7% in 2026 and then accelerate to 4.0% in 2027 and 4.2% in 2028.



Electronics Equipment Production by Country/Region 2021-2028

Growth in the industrial segment, which accounted for an estimated 60.1% of electronics equipment output in 2024, slowed in the second half of 2023 and then declined by 1.3% in 2024 through a combination of inventory re-balancing and weaker demand. Growth is forecast to gain traction in the second half of 2025 and then accelerate over the forecast period.

The outlook for the communications segment, which includes defence and commercial aviation is mixed. Lower spending by network providers and enterprises, which had negative impact in the final months of 2023, continued in 2024 and into the first half of 2025. This has been offset by growth in defence and commercial aviation. After increasing by 3.8% in 2023, growth in the communications & radar segment eased to 3.7% in 2024 and then accelerate to 4.6% at the end of the forecast. In contrast, the telecommunications segment increased by 1.7% in 2023, declined by 3.8% in 2024 before resuming growth in 2025 and reach 4.4% in 2028.

Strong demand for AI and the growth in data centres has had positive impact on the development of the computer segment in 2024 and 2025, this following the decline of 5.5% in 2023. Growth is expected to ease year on year over the forecast period reaching 0.6% in 2028 from 3.4% in 2026. The on-going decline in the production of video and audio equipment will continue over the period to 2028.

In 2024, the production of electronic components in Western Europe amounted to Euro 49.3 billion, 27.3% of overall electronics production. After two years of double-digit growth electronic component production declined by 2.0% in both 2023 and 2024 on the back of weaker demand and prices normalising following the period of higher prices fuelled by shortages.

In 2024, active components accounted for 61.7%, passive 31.9% and other 6.4% while Germany accounted for the largest share of production at 34.9%, followed by Ireland 14.9%, France 14.2%, Italy 11.2% and the UK 5.7%.

With the EU and several countries, notably Germany, France and Italy, looking to secure the future supply of leading-edge semiconductors several advanced wafer fabs were announced although several major projects have been shelved or cancelled since the last report including Intel and Wolfspeed/ZF's fabs in Germany and the STMicroelectronics/GlobalFoundries joint wafer fab in France. The region will still however benefit from the TSMC joint venture in Germany – scheduled to start operations in 2028 – and on-going investment in existing fabs. Western Europe is also home to a number of fabless semiconductor companies and remains a centre for research and design with a strong start-up culture.

At Euro 252.4 billion in 2024 the West European market for electronic equipment and components was 1.4% lower than the Euro 256.1 billion reported in the prior year and is forecast to increase to Euro 257.9 billion in 2025. In 2024, growth of 8.8% and 3.1%, respectively in the computer and communications & radar were offset by declining demand in the industrial, telecommunication and component segments. Led again by the computer segment, all market segments apart from office equipment and consumer are forecast to post growth in 2025.

The Yearbook of World Electronics Data – tracking developments in the global electronics industry

With a history now extending over 50 years, the first edition of the Volume 1 of the Yearbook of World Electronics Data was first published in 1973, the Yearbook series has been extended to cover 53 countries globally to provide an invaluable and unique insight into the global trends, regional variations and the underlying state of the global electronics market for all stages of the supply chain - OEM, contract manufacturing and design, components and materials suppliers to financial /industry analysts and government and academia.

Although encompassing a range of published and bespoke products the core of RER's research programme is one of the most comprehensive statistical databases covering the global electronics industry, with the resulting analysis being published through three concise and clear demographic volumes, as a series of individual country reports, through customised solutions to meet specific client requirements and a series of Excel databases providing the combination of both historical and forecasted data.

Yearbook of World Electronics Data - Volume 1 West Europe

Published since 1973 Volume 1 of the Yearbook of World Electronics Data provides:

- A single source solution allowing you to track the electronics industry in 16 countries in Western Europe.
- 13 major product groups.
- Market and production forecasts.
- Summaries provided in US dollars and Euros.
- CD-option allows you to manipulate the data quickly and easily: produce your own subsets or summaries of the data, create your own forecasts or cut and paste the data into your own in-house reports and presentations.

Who will benefit ?

The Yearbook is essential research providing key data for all areas of the electronics industry including:

- Distributors and manufacturers of electronic components and materials.
- Suppliers of electronic production equipment.
- OEMs.
- EMS Providers.
- Government, including investment organizations.
- Financial and industry analysts.
- Academic institutes & universities tracking developments in the electronics industry.

The Yearbook of World Electronics Data

The Yearbook of World Electronics Data series presents market and production statistics for the GLOBAL electronics industry. Available in three published volumes covering 53 countries and 13 major product groups, the yearbook is used in the formulation of business and market planning, in tracking trends based on a clear understanding on how the industry has developed historically and to provide a basis for medium and long-term forecasting.

53 country coverage, 13 major product groups

... comparable **country by country** and **product by product**.

Methodology

The Yearbooks highlight market trends and opportunities and offer corroborative evidence for individual research. Each new edition is fully revised and updated. Trade statistics are analyzed in detail, with over 500 separate categories being employed. Production statistics are collected from Government and Manufacturer's Association sources where these are available. Extensive use is also made of research reports, company reports, news items and work by other consultants to supplement and cross check the official and semi-official sources.

Markets are forecast in real terms for the next five years, with production forecast for the next two years, using constant exchange rates and excluding inflation. These are based on our extensive knowledge of the historical performance of each product, the general economic outlook and the major growth influencing factors.

2025 Series

Volume 1 2025 West Europe

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production Data 2022-2025; Market Data 2022-2028

16 country coverage

Austria; Belgium; Denmark; Finland; France; Germany; Greece; Ireland; Italy; Netherlands; Norway; Portugal;
Spain; Sweden; Switzerland; UK
Publication Data: August 2025

Volume 2 2025 America, Japan, Asia Pacific

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production
Data 2022-2025; Market Data 2022-2028
19 country coverage
Australia; Brazil; Canada; China, Hong Kong; India; Indonesia; Israel; Japan; Malaysia; Mexico, Philippines;
Singapore; South Africa; South Korea; Taiwan Thailand; Vietnam, USA
Publication Data: September 2025

Volume 3 2025 East Europe & World Summary

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production
Data 2022-2025; Market Data 2022-2028
53 Country World Summary covering production data 2022-2025 and market data for 2022-2028
13 country coverage
Bulgaria; Croatia; Czech Republic; Estonia; Hungary; Lithuania; Poland; Romania; Russia; Slovakia; Slovenia;
Turkey, Ukraine
Publication Data: October 2025

For each country production and market data is supplied for the following product groups:

- Computers
- Consumer – Video; Audio; Personal
- Control & Instrumentation
- Medical & Industrial
- Office Equipment
- Radio Communications
- Telecommunications
- Components – Passive Components; Semiconductors; Other Components

Related Products & Services

European Electronics Production 2000-2028

As part of its program of research covering developments in the European electronics industry RER has released a new statistical database providing a medium-term outlook for electronics production in Europe. Covering the period 2000-2028 the research allows you to track developments both geographically and by major product group.

The database is provided as an Excel spreadsheet providing production data for 13 product groups and 29 countries split by Western Europe and Central and Eastern Europe.

Global Electronics Production & Markets

Launched in 2012, Global Electronics Production & Markets provides top line analysis on the global electronics industry for the period 1995 to 2028 for markets and 1995-2025 for production. Through two Excel databases you can quickly analyze the structure of the global industry and how it has changed both geographically, through RER's unique coverage of 53 countries, and by thirteen major product groups. The new database will be available in October 2025.

Country Reports

Drawing on data from its core statistical database RER provides a quick, reliable and cost-effective assessment of the electronics industry for an individual country. For a full listing please visit www.rer.co.uk

Custom Research

Building on the flexibility of the two databases and the Yearbook series we can quickly search data by product or country/region to provide solutions tailored to your specific needs or budgets. Ideal for input into internal presentations/ documents the data is supplied via email.

European Electronic Markets Forecast

Market data is only one part of the equation when analyzing the European electronics industry. Updated monthly, *European Electronic Markets Forecast* (EEMF) enables you to track with minimum time and cost, the key issues and opportunities impacting the European electronics industry. From originally researched articles to the latest company developments and market analysis EEMF is your virtual "Research Analyst" utilizing over 40 years of industry and market research experience to provide you both in hardcopy and electronic formats not only reliable but objective analysis and news on the European and global electronics industry.

Summary of Contents

Market Analysis: Up-to-the-minute analysis of the key sectors of the European and Global electronics industry

Industry News: The latest industry and company news split by:

- Mergers & Acquisitions
- Automotive
- Battery Technology/Electrification
- Electronic Manufacturing Services/PCB
- Production
- Aerospace & Defence
- Semiconductors
- Renewable Energy/CleanTech

Asia Pacific Electronics: A monthly summary of key company developments within the region.

Industry Outlook – Monthly overview of developments in the broader European manufacturing sector focusing on the latest Purchasing Managers' Index (PMI) data. In addition, the section provides regular updates on the European and global economy and developments in the supply chain.

For additional information on the above publications or Reed Electronics Research's complete range of research products please contact or visit www.rer.co.uk

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SAMPLE DATA

Over the following pages we provide sample data from the **current** edition of the report. This includes summary data for both production and markets, and sample data from several countries.

CONSOLIDATED SUMMARY OF PRODUCTION 2024

Table 2.7

Country	\$M Computing	\$M Office Equip	\$M Control & Instr	\$M Medical & Industrial	\$M Radio Comms & Radar*	\$M Telecomm- unications	\$M Consumer	\$M Compo- nents	\$M TOTAL
Austria	179	3	1448	1002	390	342	4	2409	5778
Belgium	516	-	873	1027	543	174	5	930	4070
Denmark	249	-	1391	1104	476	65	17	409	3711
Finland	40	-	1147	422	597	310	--	410	2925
France	783	54	3993	2214	11728	1398	115	7605	27891
Germany	2473	46	24200	9093	3109	1508	993	18684	60105
Greece	193	7	79	22	188	80	2	73	645
Ireland	1261	4	848	2471	280	125	9	8001	12999
Italy	766	33	4082	1801	2783	978	25	5996	16463
Netherlands	821	-	3228	3623	454	272	28	1335	9761
Norway	91	-	614	213	436	77	-	99	1530
Portugal	38	-	245	101	402	120	921	536	2362
Spain	318	5	598	592	953	533	13	1164	4177
Sweden	60	-	1522	217	1914	931	65	581	5291
Switzerland	447	7	5364	2461	510	377	4111	2277	15555
UK	2638	86	6203	3533	6585	510	224	3066	22846
TOTAL	10875	245	55834	29897	31349	7799	6533	53576	196109

CONSOLIDATED SUMMARY OF MARKETS 2024

Table 2.22

Country	\$M Computing	\$M Office Equip	\$M Control & Instr	\$M Medical & Industrial	\$M Radio Comms & Radar*	\$M Telecomm- unications	\$M Consumer	\$M Compo- nents	\$M TOTAL
Austria	1818	20	1043	901	737	390	605	1711	7226
Belgium	3301	33	827	710	1436	510	402	1508	8726
Denmark	1661	28	500	306	472	317	231	942	4458
Finland	1509	22	625	329	393	115	230	1125	4349
France	10051	254	3288	2512	7558	2273	2651	7013	35600
Germany	21084	292	10520	4349	5421	2516	4607	21175	69964
Greece	797	43	325	179	516	299	376	933	3468
Ireland	2627	19	743	380	537	220	214	2584	7324
Italy	6076	239	4038	1876	4685	1777	1918	6749	27359
Netherlands	7009	120	2043	1243	1647	961	889	2871	16783
Norway	1239	29	489	405	503	172	329	636	3803
Portugal	1295	17	487	362	804	374	407	1148	4894
Spain	4318	153	1733	1380	4387	1661	1508	4408	19548
Sweden	2195	30	1023	326	1596	444	440	1808	7861
Switzerland	4951	183	2049	856	2392	613	1073	2348	14465
UK	11426	453	3923	2251	8871	1824	3346	6360	38454
TOTAL	81357	1935	33656	18367	41954	14467	19227	63317	274281

* inc mobiles.

3.9 Italy

3.9.1 Economic Outlook

GDP

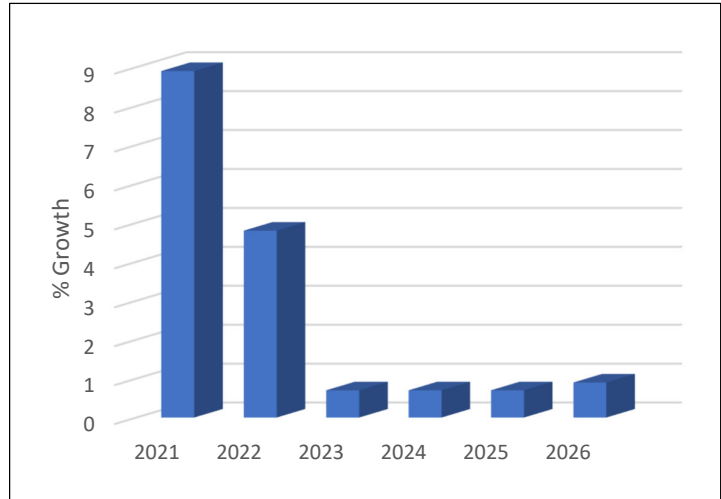
Real GDP growth is expected to remain stable at 0.7% in 2025. While domestic demand is expected to accelerate in 2025, US trade tariffs are set to affect exports of goods, while imports are still expected to expand on the back of strengthening domestic demand. Equipment investment is expected to recover from the slump of 2024, as the gradual pass-through of monetary easing lowers financing costs. In 2026, real GDP growth is expected to pick up to 0.9%. While private consumption is forecast to continue growing apace, investment is set to accelerate thanks to a further expansion in infrastructure construction, investment fuelled by RRF-related spending.

Inflation

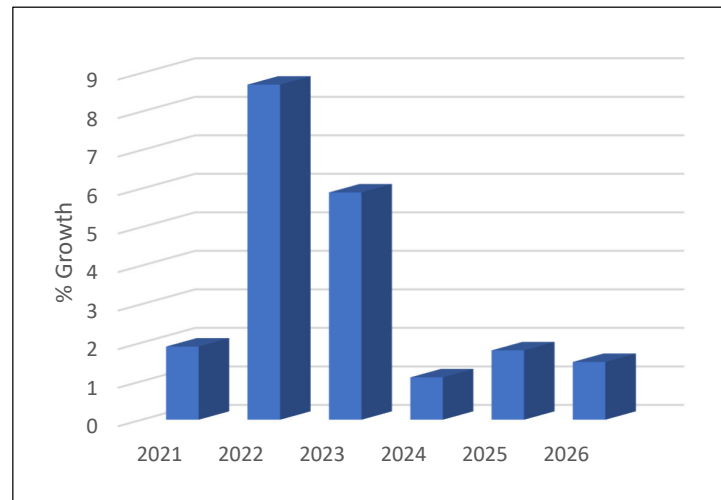
The drop in energy prices and the euro appreciation exert strong downward pressure on headline inflation, keeping the 2025 annual rate below 2%. In 2026, wage restraint, increasing productivity and further falling energy prices are forecast to push inflation down to 1.5%.

Employment

Employment is forecast to continue growing though at a slowing pace over 2025-26. The unemployment rate is expected to fall further, as the labour force expands less than total employment, in the context of a falling working-age population.



Italian GDP Growth 2021-2026



Italian Consumer Prices 2021-2026

Italy Real GDP Growth 2021-2026

% Increase	Actual			Forecast		
	2021	2022	2023	2024	2025	2026
Growth of GDP	8.9	4.8	0.7	0.7	0.7	0.9
Consumer Prices*	1.9	8.7	5.9	1.1	1.8	1.5

Note: Percentage change on previous year * Harmonised index of consumer prices. Source: EU Spring Economic Forecast May 2025

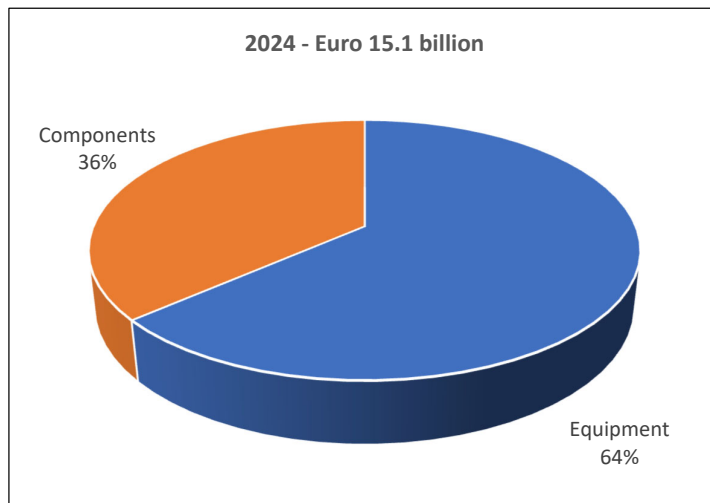
3.9.2 Electronics Industry Overview

Overview

Summary of Italian Electronics Production 2020-2025

Euro Millions	2020	2021	2022	2023	2024	2025
Computing	383	633	628	734	735	745
Industrial	4741	5345	5522	5562	5412	5504
Communications	3160	3247	3374	3422	3460	3535
Consumer	21	22	23	23	23	23
Components	4155	4909	5489	6137	5516	5585
Total	12460	14156	15036	15878	15146	15392

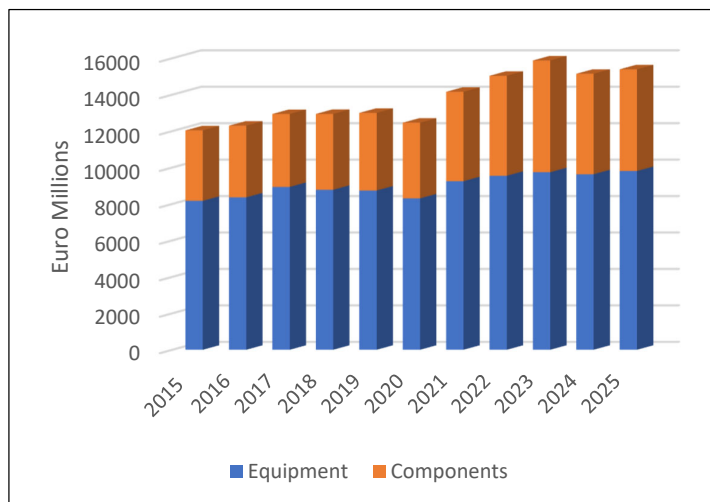
Notes: Computing includes office equipment; Industrial combines control and instrumentation and medical and industrial; and communications combines fixed and wireless communications (inc. defence). Due to computer rounding the summary figures above may differ slightly from the figures presented in the main tables.



Italian Electronics Production 2025

The production of electronics equipment and components, after increasing by 5.6% in 2023, declined by 4.6% in 2024 on the back of weaker demand and an inventory rebalancing primarily in control and instrumentation. Electronics equipment output, which accounted for 63.6% of electronics production in 2024, declined by 1.1% while electronic component production fell by 10.1%.

Italy is also an important centre for the production of automotive electronics and household appliances, although production of appliances has been scaled-back in recent years.



Italian Electronics Production 2015-2025

Electronics Equipment

Control and instrumentation and communications and radar accounted for 39.0% and 26.6% of electronics equipment output respectively in 2024.

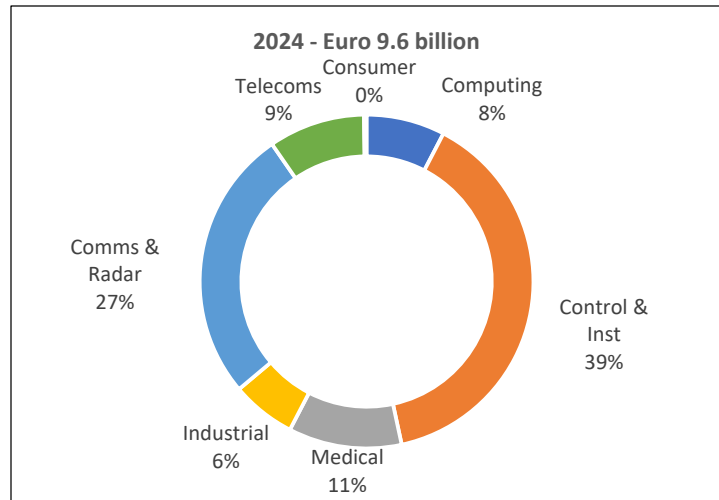
After increasing by 3.0% output for the control and instrumentation sector declined 5.1% in 2024, the subdued European and global economy impacting both domestic and overseas demand. Growth is forecast to increase by 2.7% in 2025 on the back of the expected recovery in demand in the second half of the year.

The medical sector accounted for 11.0% of electronic equipment production in 2024, production for the year increasing by 2.4%. Lower exports in the first half of 2025 is expected to dampen growth with output forecast to decline by 2.0% for the year.

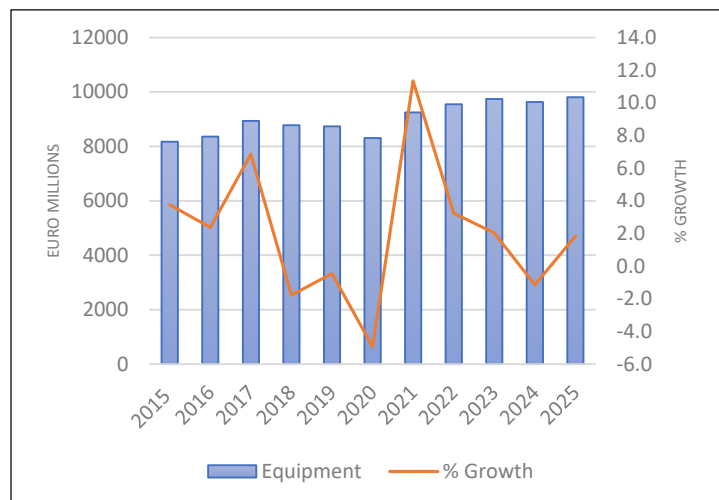
Output for the telecommunications segment after increasing by 3.1% in 2022 has been impacted by lower spending by service providers and enterprises production declining by 1.4% in 2023, 3.4% in 2024 with a further fall of 2.5% forecast for 2025.

The communications and radar sector posted growth of 2.8% in 2024. Defence and aerospace related output offsetting lower production for wireless infrastructure equipment. Leonardo holds a leading position in the European aerospace and defence industry and is a key member of several pan-European joint ventures in the sector.

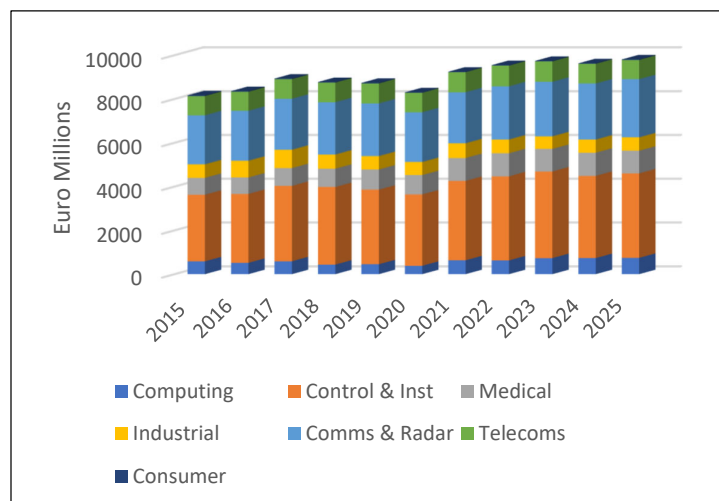
Like other countries in Western Europe the production of consumer electronics is now minimal.



Italian Electronics Equipment Production by Sector 2024



Italian Electronics Equipment Production 2015-2025



Italian Electronics Equipment Production by Sector 2015-2025

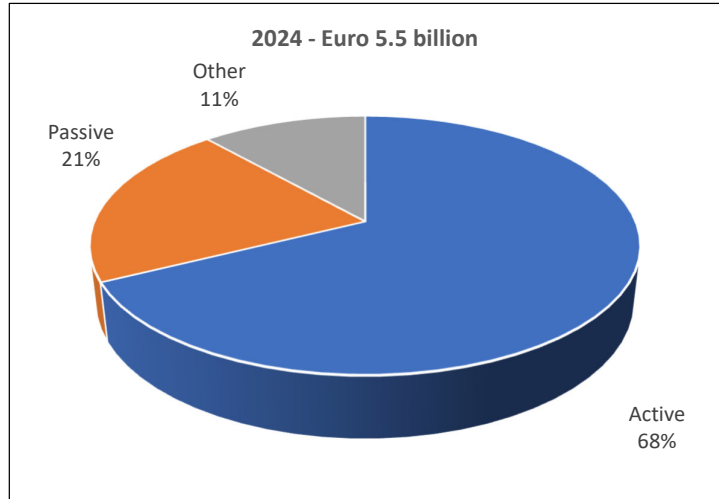
Components

The Italian components sector is dominated by the production of active components which accounted for 67.6% of output in 2024.

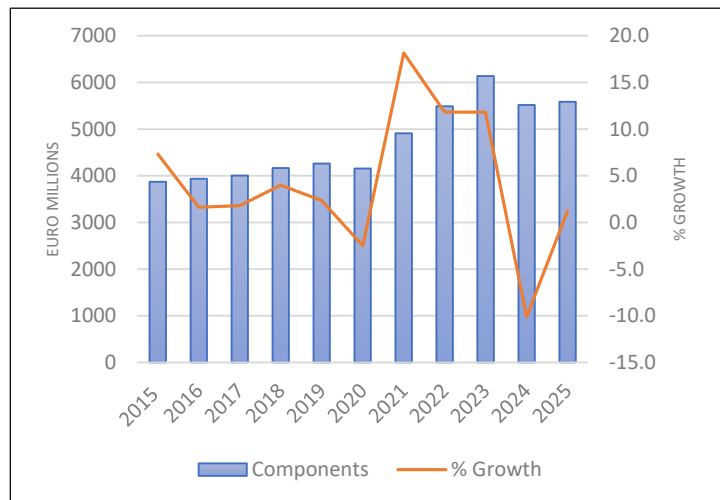
The production of ICs, after increasing by 7.2% in 2023, declined by 14.3% in 2024 on the back of lower demand in several end-markets including industrial and automotive. A modest recovery is expected in 2025 with output increasing by 2.0%.

In April 2025, ST outlined plans for the reorganization of its semiconductor manufacturing operations. In Italy, the 300mm fab in Agrate, will see capacity doubled to 4,000 wafers per week (wpw) by 2027, with planned modular expansions increasing capacity up to 14,000 wpw, depending on market conditions. The site in Catania will continue to serve as a centre of excellence for power and wide-bandgap semiconductor devices. The development of the new Silicon Carbide Campus, announced in May 2024, is progressing as planned, with production of 200mm wafers set to begin in Q4 2025, reinforcing ST's leadership in next-generation power technologies.

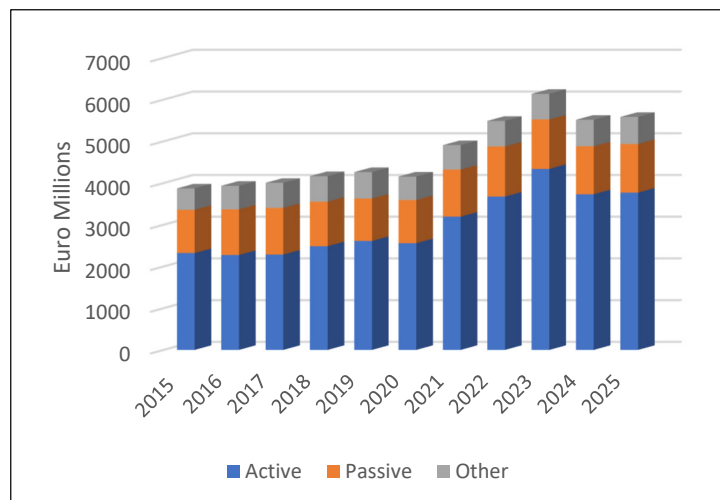
Passive components accounted for 20.8% of electronic component production in 2024. The production of connectors accounted for 40.1% of the total in 2024 while PCBs accounted for 24.4%.



Italian Electronics Component Production 2024



Italian Electronics Component Production 2015-2025



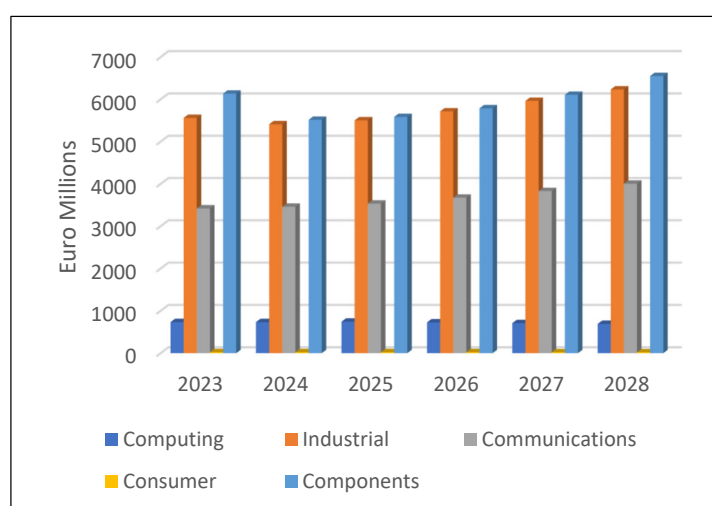
Italian Electronics Component Production by Sector 2015-2025

Outlook

Summary of Italian Electronics Production – Medium Term Forecast 2023-2028

Euro Millions	2023	2024	2025	2026	2027	2028
Computing	734	735	745	728	710	692
Industrial	5562	5412	5504	5716	5965	6235
Communications	3422	3460	3535	3675	3832	4005
Consumer	23	23	23	23	22	21
Components	6137	5516	5585	5790	6108	6554
Total	15878	15146	15392	15932	16636	17506

Notes: Computing includes office equipment; Industrial combines control and instrumentation and medical and industrial; and communications combines fixed and wireless communications (inc. defence). Due to computer rounding the summary figures above may differ slightly from the figures presented in the main tables.



Italian Electronics Production by Sector 2023-2028

Equipment production in the period to 2028 will continue to be focused on industrial and fixed and wireless communications including defence, with these sectors offsetting the gradual decline in the computer segment.

The production of passive components will show modest growth over the forecast period with production of commodity products being transferred to lower cost locations while the semiconductor sector, as highlighted, will continue to be influenced by developments at STMicroelectronics with recent investments by the company expected to boost output over the later part of the forecast.

3.5.3 FRANCE PRODUCTION

COMPUTING		2022	2023	2024	2025
Complete Systems	€M	215	200	220	222
	\$M	226	217	239	241
Peripherals	€M	475	480	460	448
	\$M	500	522	500	487
Accessories & Parts	€M	57	45	40	40
	\$M	60	49	43	43
Computing Total	€M	747	725	720	709
	\$M	786	788	783	771

OFFICE EQUIPMENT		2022	2023	2024	2025
Office Equipment Total	€M	50	45	50	48
	\$M	53	49	54	52

CONTROL & INSTRUMENTATION		2022	2023	2024	2025
Total Industrial & Process Control	€M	1380	1490	1480	1515
	\$M	1453	1620	1609	1647
Instrumentation					
Analytical Instruments	€M	380	430	390	421
	\$M	400	467	424	458
Nucleonic Instruments	€M	120	152	143	167
	\$M	126	165	155	182
Signal Generators	€M	20	20	22	19
	\$M	21	22	24	21
Telecoms Instruments	€M	39	36	31	29
	\$M	41	39	34	31
Machine & Materials Test Instruments	€M	102	110	125	116
	\$M	107	120	136	126
Electrical Quantity Measuring Instruments	€M	108	128	125	123
	\$M	114	139	136	134
Other Test & Measuring Instruments	€M	828	853	843	835
	\$M	872	927	916	908
Total Instrumentation	€M	1597	1729	1679	1711
	\$M	1681	1879	1825	1859
Accessories & Parts	€M	530	520	515	521
	\$M	558	565	560	567
Control & Instrumentation Total	€M	3507	3739	3674	3747
	\$M	3692	4064	3993	4073

FRANCE PRODUCTION (ctd)

MEDICAL & INDUSTRIAL		2022	2023	2024	2025
X-Ray & Medical Equipment					
Medical X-Ray Equipment	€M	375	450	400	418
	\$M	395	489	435	454
Industrial X-Ray Equipment	€M	60	50	50	52
	\$M	63	54	54	56
Electrocardiographs	€M	20	20	20	18
	\$M	21	22	22	20
Other Electromedical Equipment	€M	485	520	500	527
	\$M	511	565	543	573
Hearing Aids	€M	14	14	10	14
	\$M	15	15	11	15
X-Ray & Medical Equipment Total	€M	954	1054	980	1029
	\$M	1004	1146	1065	1118
Industrial Equipment					
Traffic Signalling Equipment	€M	290	285	285	284
	\$M	305	310	310	309
Other Signalling Equipment	€M	575	600	550	588
	\$M	605	652	598	639
Other Industrial Equipment	€M	245	238	222	217
	\$M	258	259	241	235
Total Industrial Equipment	€M	1110	1123	1057	1089
	\$M	1168	1221	1149	1183
Medical & Industrial Equipment Total	€M	2064	2177	2037	2118
	\$M	2173	2366	2214	2302
COMMUNICATIONS & RADAR		2022	2023	2024	2025
Radar & Navigational Aids	€M	6500	6900	7400	7769
	\$M	6842	7500	8043	8445
Radio Comms inc Mobile Phones	€M	3560	3560	3390	3431
Public Broadcasting & Parts	\$M	3747	3870	3685	3729
Communications & Radar Total	€M	10060	10460	10790	11200
	\$M	10589	11370	11728	12174

FRANCE PRODUCTION (ctd)

TELECOMMUNICATIONS		2022	2023	2024	2025
Telephone Sets	€M	50	45	40	39
	\$M	53	49	43	42
Other Telecoms Equipment	€M	1241	1266	1246	1253
	\$M	1306	1376	1354	1362
Telecommunications Total	€M	1291	1311	1286	1292
	\$M	1359	1425	1398	1405

CONSUMER		2022	2023	2024	2025
Video Equipment					
Video Cameras	€M	2	2	2	2
	\$M	2	2	2	2
Video Tuners & Satellite Receivers	€M				
	\$M	1	1	1	1
Video Equipment Total	€M				
	\$M	3	3	3	3
Audio Equipment					
Car Audio	€M	17	15	12	11
	\$M	18	16	13	12
Audio Equipment Total	€M	17	15	12	11
	\$M	18	16	13	12
Personal Consumer Equipment					
Electronic Musical Instruments	€M	7	7	7	8
	\$M	7	8	8	8
Electric/Electronic Watches	€M	80	80	78	75
	\$M	84	87	85	82
Electric/Electronic Clocks	€M	6	6	5	5
	\$M	6	7	5	5
Electronic Flashlights	€M	1	1	1	1
	\$M	1	1	1	1
Total Personal Equipment	€M	94	94	91	89
	\$M	99	102	99	97
Consumer Equipment Total	€M	114	112	106	103
	\$M	120	122	115	112

FRANCE PRODUCTION (ctd)

COMPONENTS		2022	2023	2024	2025
Active Components					
Valves & Tubes	€M	282	305	320	326
	\$M	297	332	348	354
Diodes	€M	265	200	180	173
	\$M	279	217	196	188
Transistors	€M	110	100	90	91
	\$M	116	109	98	99
Other Discrete Semiconductors	€M	875	830	600	621
	\$M	921	902	652	675
ICs & Other Microcircuits	€M	3450	3520	3300	3429
	\$M	3632	3826	3587	3727
Active Components Total	€M	4982	4955	4490	4640
	\$M	5244	5386	4880	5043
Passive Components					
Electrolytic Capacitors	€M	54	56	50	50
	\$M	57	61	54	54
Other Fixed Capacitors	€M	105	100	110	114
	\$M	111	109	120	124
Variable Capacitors	€M	2	2	2	2
	\$M	2	2	2	2
Fixed Resistors	€M	75	75	70	68
	\$M	79	82	76	74
Variable Resistors	€M	2	2	2	2
	\$M	2	2	2	2
Connectors	€M	1340	1425	1400	1442
	\$M	1411	1549	1522	1567
Transformers & Inductors	€M	102	100	95	97
	\$M	107	109	103	105
Relays	€M	47	47	45	44
	\$M	49	51	49	48
Switches	€M	65	68	66	67
	\$M	68	74	72	73
Printed Circuit Boards	€M	285	292	280	291
	\$M	300	317	304	316
Total Passive Components	€M	2077	2167	2120	2177
	\$M	2186	2355	2304	2366

FRANCE PRODUCTION (ctd)

COMPONENTS (ctd)		2022	2023	2024	2025
Other Components					
Microphones	€M	2	2	2	2
	\$M	2	2	2	2
Loudspeakers	€M	180	195	205	211
	\$M	189	212	223	229
Amplifiers	€M	5	5	5	4
	\$M	5	5	5	5
Aerials	€M	34	32	30	29
	\$M	36	35	33	31
Unrecorded Media	€M	14	12	10	9
	\$M	15	13	11	10
Accessories & Parts for Consumer Equipment	€M	145	138	135	136
	\$M	153	150	147	148
Total Other Components	€M	380	384	387	390
	\$M	400	417	421	424
Total Components Production	€M	7439	7506	6997	7207
	\$M	7831	8159	7605	7834
TOTAL PRODUCTION - FRANCE		2022	2023	2024	2025
Total	€M	25272	26075	25660	26425
	\$M	26602	28342	27891	28723

Notes: 2022 and 2023 are current figures at current exchange rates. 2024 is an estimate and 2025 a forecast at 2024 constant values and exchange rates (i.e. inflation is not included). Base year 2024

3.6.4 GERMANY MARKETS

COMPUTING		2022	2023	2024	2025	2026	2027	2028
Computers Total	€M	8026	8005	9834	10607	11226	11755	12201
	\$M	8448	8701	10689	11529	12202	12777	13262
Peripherals - Storage	€M	2636	2627	3136	3359	3531	3672	3785
	\$M	2775	2855	3409	3651	3838	3991	4114
Other Peripherals & Equipment	€M	1805	1670	1533	1642	1726	1795	1850
	\$M	1900	1815	1666	1785	1876	1951	2011
Accessories & Parts	€M	4874	4770	4894	5146	5310	5421	5485
	\$M	5131	5185	5320	5594	5772	5892	5962
Computing Total	€M	17341	17072	19397	20755	21793	22642	23322
	\$M	18254	18557	21084	22560	23688	24611	25350

OFFICE EQUIPMENT		2022	2023	2024	2025	2026	2027	2028
Office Equipment	€M	295	281	269	264	253	242	230
	\$M	311	305	292	287	275	264	250
Office Equipment Total	€M	295	281	269	264	253	242	230
	\$M	311	305	292	287	275	264	250

CONTROL & INSTRUMENTATION		2022	2023	2024	2025	2026	2027	2028
Total Industrial & Process Control	€M	6595	6816	6469	6632	6971	7346	7762
	\$M	6942	7409	7032	7208	7577	7985	8437
Instrumentation								
Analytical Instruments	€M	624	584	541	547	567	589	614
	\$M	657	635	588	594	616	640	667
Machine & Materials Test Instruments	€M	500	512	503	494	497	502	508
	\$M	526	557	547	537	540	545	552
Electrical Quantity Measuring Instruments	€M	106	109	102	100	101	102	104
	\$M	112	118	111	109	110	111	113
Other Test & Measuring Instruments	€M	1417	1439	1346	1336	1360	1387	1419
	\$M	1492	1564	1463	1452	1478	1508	1543
Total Instrumentation	€M	2647	2644	2492	2477	2525	2580	2644
	\$M	2786	2874	2709	2692	2744	2805	2874
Accessories & Parts	€M	720	735	717	705	711	718	728
	\$M	758	799	779	766	773	781	791
Control & Instrumentation Total	€M	9962	10195	9678	9813	10206	10645	11135
	\$M	10486	11082	10520	10667	11094	11571	12103

GERMANY MARKETS (ctd)

MEDICAL & INDUSTRIAL		2022	2023	2024	2025	2026	2027	2028
Medical X-Ray Equipment	€M	588	604	552	573	597	622	650
	\$M	619	657	600	623	649	676	706
Industrial X-Ray Equipment	€M	23	25	24	25	25	26	26
	\$M	24	27	26	27	27	28	29
Medical Radiation Equipment	€M	44	45	43	43	44	44	44
	\$M	46	49	47	47	47	48	48
Industrial Radiation Equipment	€M	27	28	28	28	29	29	30
	\$M	28	30	30	31	31	32	33
Other Electromedical Equipment (inc Electrocardiographs)	€M	1237	1290	1325	1385	1452	1523	1600
	\$M	1302	1402	1440	1505	1579	1656	1740
Hearing Aids	€M	117	108	109	110	112	114	116
	\$M	123	117	118	120	122	124	127
X-Ray & Medical Equipment Total	€M	2036	2100	2081	2164	2259	2359	2467
	\$M	2143	2283	2262	2352	2456	2564	2682
Railway Signalling Equipment	€M	361	476	451	472	502	536	573
	\$M	380	517	490	513	546	583	622
Traffic Signalling Equipment	€M	206	229	224	224	228	232	237
	\$M	217	249	243	243	248	253	258
Security & Fire Alarms	€M	601	615	611	628	657	690	724
	\$M	633	668	664	683	714	750	787
Other Signalling Equipment	€M	507	487	470	470	478	487	498
	\$M	534	529	511	510	519	530	541
Other Industrial Equipment	€M	184	179	164	165	170	175	180
	\$M	194	195	178	180	184	190	196
Industrial Equipment Total	€M	1859	1986	1920	1958	2035	2120	2211
	\$M	1957	2159	2087	2129	2212	2305	2404
Medical & Industrial Total	€M	3895	4086	4001	4123	4294	4479	4679
	\$M	4100	4441	4349	4481	4668	4869	5086

COMMUNICATIONS & RADAR		2022	2023	2024	2025	2026	2027	2028
Radar & Navigational Aids	€M	1168	1237	1365	1407	1490	1589	1696
	\$M	1229	1345	1484	1529	1620	1727	1844
Radio Comms inc Mobile Phones, Public Broadcasting & Parts	€M	3746	3785	3622	3605	3687	3796	3914
	\$M	3943	4114	3937	3919	4008	4126	4255
Communications & Radar Total	€M	4914	5022	4987	5012	5177	5384	5611
	\$M	5173	5459	5421	5448	5628	5853	6098

GERMANY MARKETS (ctd)

TELECOMMUNICATIONS		2022	2023	2024	2025	2026	2027	2028
Telephone Sets	€M	215	198	183	176	174	173	172
	\$M	226	215	199	191	189	188	187
Other Telecommunications Equipment	€M	2190	2232	2132	2158	2250	2351	2458
	\$M	2305	2426	2317	2345	2446	2556	2672
Telecommunications Total	€M	2405	2430	2315	2334	2425	2524	2630
	\$M	2532	2641	2516	2536	2635	2743	2859

CONSUMER		2022	2023	2024	2025	2026	2027	2028
Video Equipment								
Colour Television	€M	2230	2126	2182	2130	2170	2131	2088
	\$M	2347	2311	2372	2315	2359	2316	2270
DVD Players & Recorders	€M	47	41	37	34	30	27	25
	\$M	49	45	40	37	33	29	27
Video & Digital Still Cameras	€M	450	436	434	429	416	402	386
	\$M	474	474	472	466	452	437	420
Video Tuners & Satellite Receivers	€M	114	110	106	102	97	93	88
	\$M	120	120	115	111	105	101	96
Video Equipment Total	€M	2841	2713	2759	2695	2713	2653	2587
	\$M	2991	2949	2999	2929	2949	2884	2812
Audio Equipment								
Audio Equipment	€M	878	831	822	801	777	753	725
	\$M	924	903	893	871	845	819	788
Audio Equipment Total	€M	878	831	822	801	777	753	725
	\$M	924	903	893	871	845	819	788
Personal Consumer Equipment								
Electronic Musical Instruments	€M	119	114	113	110	112	113	114
	\$M	125	124	123	120	121	123	124
Electric/Electronic Watches	€M	518	509	499	496	511	526	541
	\$M	545	553	542	540	555	571	588
Electric/Electronic Clocks	€M	47	45	43	39	37	34	32
	\$M	49	49	47	42	40	37	35
Electronic Flashlights	€M	10	7	3	2	2	2	1
	\$M	11	8	3	3	2	2	1
Personal Consumer Equipment Total	€M	694	675	658	648	661	674	688
	\$M	731	734	715	704	719	733	748
Consumer Equipment Total	€M	4413	4219	4239	4144	4151	4080	4001
	\$M	4645	4586	4607	4505	4512	4435	4349

GERMANY MARKETS (ctd)

COMPONENTS		2022	2023	2024	2025	2026	2027	2028
Active Components								
X-Ray Tubes	€M	209	220	210	215	222	228	235
	\$M	220	239	228	234	241	248	255
Other Valves & Tubes	€M	27	21	19	19	18	18	17
	\$M	28	23	21	21	20	20	18
Diodes	€M	317	315	268	263	272	283	294
	\$M	334	342	291	286	296	308	320
Transistors	€M	393	407	348	336	350	364	379
	\$M	414	442	378	365	380	396	412
Thyristors	€M	78	77	70	71	74	77	80
	\$M	82	84	76	77	80	84	87
Photocells	€M	3644	3152	1631	1435	1493	1560	1638
	\$M	3836	3426	1773	1560	1623	1696	1780
Other Discrete Semiconductors	€M	330	318	338	331	344	359	374
	\$M	347	346	367	360	374	390	407
Piezoelectric Crystals	€M	184	180	163	165	170	177	184
	\$M	194	196	177	179	185	192	200
Hybrid Circuits	€M	95	98	90	88	90	88	86
	\$M	100	107	98	96	98	96	93
ICs & Other Microcircuits	€M	9373	9797	8747	8834	9188	9601	10014
	\$M	9866	10649	9508	9602	9987	10436	10885
Active Components Total	€M	14650	14585	11884	11757	12221	12755	13301
	\$M	15421	15853	12917	12779	13284	13864	14458
Passive Components								
Electrolytic Capacitors	€M	297	303	267	259	269	281	293
	\$M	313	329	290	282	292	305	318
Other Fixed Capacitors	€M	579	581	487	477	497	519	543
	\$M	609	632	529	518	540	564	590
Variable Capacitors	€M	6	5	4	4	4	4	4
	\$M	6	5	4	4	4	4	4
Fixed Resistors	€M	188	179	154	152	158	165	172
	\$M	198	195	167	165	172	179	187
Variable Resistors	€M	34	31	27	26	26	25	25
	\$M	36	34	29	28	28	27	27
Multi-Pin & RF Connectors	€M	1646	1750	1649	1707	1782	1862	1948
	\$M	1733	1902	1792	1855	1937	2024	2117
Other Connection Devices	€M	821	795	765	787	821	857	896
	\$M	864	864	832	855	892	932	974

GERMANY MARKETS (ctd)

COMPONENTS (ctd)		2022	2023	2024	2025	2026	2027	2028
Passive Components								
Inductors	€M	420	405	385	377	392	408	426
	\$M	442	440	418	410	426	443	463
Relays	€M	123	119	113	114	118	122	127
	\$M	129	129	123	124	128	133	138
Switches	€M	172	163	154	156	162	169	176
	\$M	181	177	167	170	176	184	191
Printed Circuit Boards	€M	1535	1479	1295	1321	1374	1436	1502
	\$M	1616	1608	1408	1436	1493	1561	1633
Passive Components Total	€M	5821	5810	5300	5380	5603	5848	6112
	\$M	6127	6315	5761	5848	6090	6357	6643
Other Components								
Microphones	€M	83	89	93	91	93	95	97
	\$M	87	97	101	99	101	103	105
Loudspeakers	€M	773	714	674	694	716	740	764
	\$M	814	776	733	754	778	804	830
Amplifiers	€M	162	166	159	163	168	174	179
	\$M	171	180	173	177	183	189	195
Aerials	€M	56	53	52	53	53	52	51
	\$M	59	58	57	58	58	57	55
Unrecorded Media	€M	158	150	138	134	129	123	118
	\$M	166	163	150	146	140	134	128
Headphones	€M	672	632	595	616	637	660	683
	\$M	707	687	647	670	692	717	742
Accessories & Parts for Consumer Equipment	€M	595	587	586	594	606	620	634
	\$M	626	638	637	646	659	674	689
Other Components Total	€M	2499	2391	2297	2345	2402	2464	2526
	\$M	2631	2599	2497	2549	2611	2678	2746
Components Total	€M	22970	22786	19481	19482	20226	21067	21939
	\$M	24179	24767	21175	21176	21985	22899	23847

TOTAL MARKET - GERMANY		2022	2023	2024	2025	2026	2027	2028
TOTAL MARKET	€M	66195	66091	64367	65926	68525	71065	73546
	\$M	69679	71838	69964	71659	74484	77244	79941

Notes: 2022 and 2023 are current figures at current exchange rates

2024 is an estimate and 2025 to 2028 are forecasts at 2024 constant values & exchange rates (i.e. Inflation is not included)

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