

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

2026

Yearbook of World Electronics Data Volume 1 2026 – An Overview of Electronics Production & Markets in Western Europe

Introduction

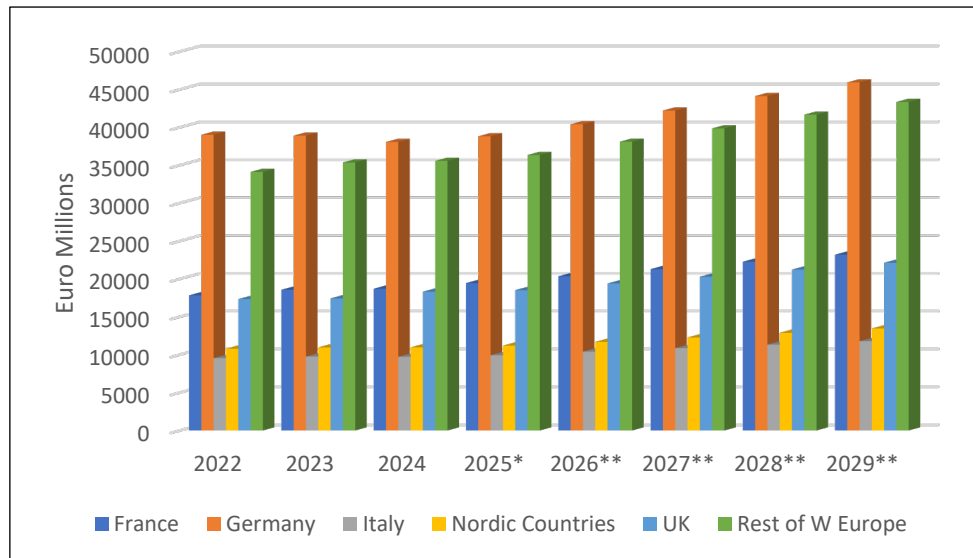
In providing the forecasts for the current study, which were made at the beginning of August, we have:

- An escalation of the US and Israeli war on Iran could lead to higher energy prices, further supply chain disruptions and lower investment and consumer spending on the back of weaker growth in the European and global economies.
- The huge investments in AI and data centres is leading to severe supply constraints for memory chips and dramatically increasing prices. The current memory crunch is expected to continue into 2027 and potentially 2028.
- With higher memory costs pushing the cost of smartphones, PCs and other consumer electronics equipment higher it is expected that demand will weaken over the course of 2026 and into 2027. Manufacturers are also expected to focus on premium brand products.
- AI demand and raw material shortages are also impacting the supply of PCBs leading to higher prices and the potential of allocation.
- With the availability of other materials and electronic components also tightening and prices escalating the ability to source materials could push production into 2027.
- The current shortage of materials and components could lead to a spike in revenues as costs are passed through and lead to similar market conditions to 2022 and 2023.
- 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 the period to 2028.
- Defence will be a major contributor to growth over the period to 2029 as government's significantly increase spending.

Despite the potential headwinds we expect growth in the European electronics industry to strengthen over the course of 2026 and gain momentum in 2027 and 2028 with growth expected to ease in the final year of the forecast. However, the shortage of components and materials could see production and deliveries pushed into 2027.

In Euro's the production of electronic equipment in Western Europe increased by an estimated 2.2% in 2025 to Euro 134.3 billion, and compared to the prior year's increase of 0.3% in the prior year, growth in the communications segment – primarily radar and navigation/defence – computing and industrial offsetting a fall in consumer output.

Based on current indicators we are forecasting that growth in electronic equipment output in Western Europe will increase by 4.5% in 2026, 4.6% in 2027 and 2028 before easing to 4.1% in 2029.



Electronics Equipment Production by Country/Region 2022-2029

Growth in the industrial segment, which accounted for an estimated 59.9% of electronics equipment output in 2025, posted growth of 1.5% on the back of growth in the second half of the year as demand improved and inventories were finally worked off. Growth is forecast to rebound in 2026 to 4.4% and then edge up to 4.7% in 2028 before easing in 2029

Within the communications sector growth is being driven by the demand for radar and navigation and defence electronics. Lower spending by network providers and enterprises, which dampened growth in the final months of 2023, 2024 and the first months of 2025, resumed in the second half of the year and should accelerate over the period to 2029. After increasing by 3.9% in 2024 growth in the communications and radar segment edged up to 5.3% in 2025 and to a forecasted 5.5% in 2026. In contrast, the telecommunications segment declined by 3.8% in 2024, increased by 1.9% in 2025 and is forecast to grow by 3.9% in 2026.

Strong demand for AI and the growth in data centres has had positive impact on the development of the computer segment although with limited volume manufacturing in the region production is focused on specialised equipment. After increasing by 4.5% in 2026 growth is expected to ease year on year over the forecast period to 1.2% in 2029. The on-going decline in the production of video and audio equipment will continue over the period to 2029.

After declining by 0.3% in 2023 and by a further 2.2% in 2024 electronics equipment production in Germany posted growth of 2.2% in 2025 with this forecast to accelerate to 4.1% in 2026. In 2025, Germany accounted for 28.9% of West European electronics equipment output although with the country focused on industrial and to a lesser extent radar and navigation and defence electronics, this is forecast to edge down to 28.7% in 2029. Countries benefiting from the growth aviation and defence include France, Italy, Spain and the UK.

In 2025, the production of electronic components in Western Europe amounted to Euro 51.3 billion, 27.6% of overall electronics production. After declining by 2.2% in 2023 and a further 1.8% in 2024 electronic component output resumed growth in 2025 with growth of 3.9% with this set to accelerate to 12.4% in 2026. Growth in 2026 will be supported by increase demand across several end markets and rising prices.

In 2025, active components accounted for 62.7%, passive 31.1% and other 6.3% while Germany accounted for the largest share of production at 34.1%, followed by Ireland 14.9%, France 14.6%, Italy 11.2% and the UK 5.6%.

At Euro 268.4 billion in 2025 the West European market for electronic equipment and components was 5.3% higher than the Euro 254.8 billion reported in the prior year and is forecast to increase to Euro 298.9 billion in 2026. Growth in 2025 was primarily driven by the huge investments in AI and data centres which led to the

computer segment increasing by 16.9% year on year. In contrast, industrial increased by 1.4%, telecommunications 2.6% and communications and radar 2.7% while consumer and components declined by 1.8%. Led again by the computer segment, all market segments apart from office equipment and consumer are forecast to post growth in 2026.

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.

2026 Series

Volume 1 2026 West Europe

Synopsis: Economic Overview; Electronics Market Overview; Imports 2023-2024; Exports 2023-2024; Production Data 2023-2026; Market Data 2023-2029

16 country coverage

Austria; Belgium; Denmark; Finland; France; Germany; Greece; Ireland; Italy; Netherlands; Norway; Portugal; Spain; Sweden; Switzerland; UK

Publication Data: August 2026

Volume 2 2026 America, Japan, Asia Pacific

Synopsis: Economic Overview; Electronics Market Overview; Imports 2023-2024; Exports 2023-2024; Production Data 2023-2026; Market Data 2023-2029

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 2026

Volume 3 2026 East Europe & World Summary

Synopsis: Economic Overview; Electronics Market Overview; Imports 2023-2024; Exports 2023-2024; Production Data 2023-2026; Market Data 2023-2029

53 Country World Summary covering production data 2023-2026 and market data for 2023-2029

13 country coverage

Bulgaria; Croatia; Czech Republic; Estonia; Hungary; Lithuania; Poland; Romania; Russia; Slovakia; Slovenia; Turkey, Ukraine

Publication Data: October 2026

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 2000-2029

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 2000-2029 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 27 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 1996 to 2029 for markets and 1996-2026 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 November 2026.

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 2025

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	182	7	1534	1105	422	358	5	2833	6444
Belgium	540	-	934	1097	614	188	5	990	4366
Denmark	279	-	1522	1128	432	60	15	490	3926
Finland	41	-	1188	439	551	324	-	484	3026
France	848	63	4290	2468	12830	1478	125	8475	30576
Germany	2568	48	25868	9292	3710	1602	1025	19872	63985
Greece	199	7	86	23	205	86	2	76	684
Ireland	1330	5	920	2742	284	134	7	8685	14107
Italy	778	34	4324	2014	3131	986	25	6510	17802
Netherlands	881	-	3384	3844	500	295	30	1425	10359
Norway	92	-	668	213	408	75	-	107	1564
Portugal	45	-	193	97	438	131	832	560	2295
Spain	335	6	625	659	1076	580	14	1291	4585
Sweden	71	-	1608	245	2136	1054	94	625	5832
Switzerland	500	6	5717	2822	563	412	4261	2564	16845
UK	2711	91	6505	3722	7197	537	196	3222	24181
TOTAL	11400	265	59367	31909	34495	8300	6635	58208	210579

CONSOLIDATED SUMMARY OF MARKETS 2029

Table 2.26

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	2446	16	1193	1121	883	478	605	2017	8759
Belgium	4137	26	1000	873	1722	617	392	1767	10536
Denmark	2532	25	632	362	553	386	223	1135	5848
Finland	4561	18	813	445	483	138	233	1326	8016
France	14554	219	3944	3178	9254	2744	2602	8202	44698
Germany	31003	244	12446	5462	6615	3060	4506	24931	88266
Greece	866	26	452	300	623	397	399	1153	4217
Ireland	4795	21	1020	473	630	276	222	3172	10608
Italy	7380	229	4974	2261	5710	2122	1905	7803	32386
Netherlands	9108	105	2455	1513	2034	1176	875	3407	20672
Norway	5088	24	660	516	601	209	330	759	8188
Portugal	1668	18	615	579	932	457	415	1393	6075
Spain	7033	89	2383	1614	5545	2073	1516	5156	25409
Sweden	4357	27	1268	394	2069	567	446	2193	11321
Switzerland	6281	161	2486	1047	2791	758	1083	2799	17407
UK	15432	394	4645	2709	10684	2199	3223	7401	46687
TOTAL	121241	1641	40987	22847	51129	17659	18975	74614	349093

* inc mobiles.

3.6 Germany

3.6.1 Economic Outlook

GDP

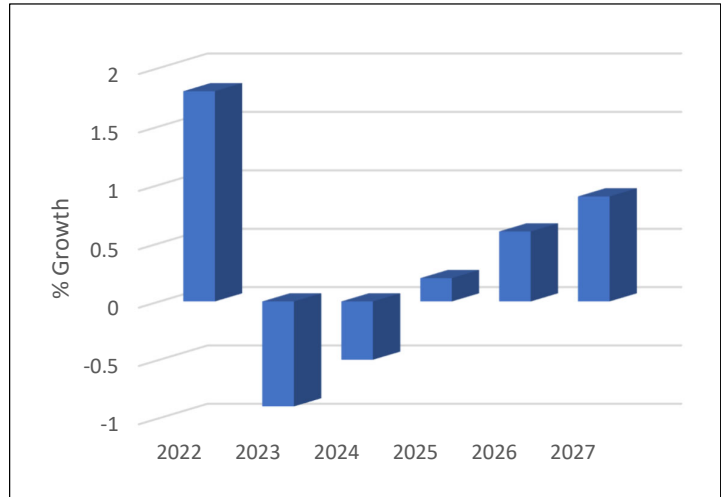
Since the COVID-19 pandemic, Germany has recorded one of the weakest recoveries among advanced economies. After two years of recession and weak growth of 0.2% in 2025, economic activity is set to expand by 0.6% in 2026 and 0.9% in 2027. The energy price shock has raised costs and prices, weighing on real incomes and profit margins, thereby slowing demand. However, the ramp-up in public spending is set to contribute positively to overall growth. Private consumption is expected to strengthen somewhat in 2027, as uncertainty subsides and sentiment improves. Investment is set to recover only gradually, largely due to the public component.

Inflation

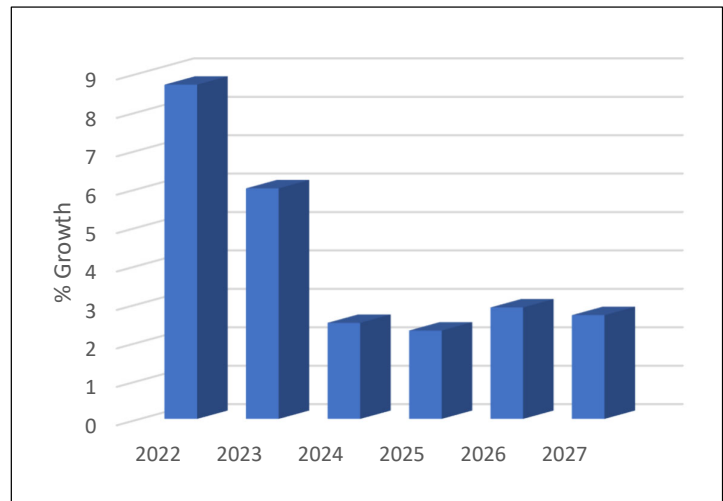
After easing to 2.3% in 2025, HICP inflation is projected to spike to 2.9% in 2026 before dropping again to 2.7% in 2027. The outbreak of the conflict in the Middle East in March 2026 caused a sharp increase in fuel prices, driving energy inflation. Energy prices are expected to decrease only slightly over the forecast period.

Employment

Weak GDP growth has resulted in decreasing labour demand, leading to stagnating employment growth. However, sectoral trends persist as job losses in manufacturing are expected to be offset by gains in public services, such as education and health. The unemployment rate is set to rise to 4.0% in 2026 before decreasing slightly to 3.9% in 2027.



German GDP Growth 2022-2027



German Consumer Prices 2022-2027

Germany Real GDP Growth 2022-2027

% Increase	Actual			Forecast		
	2022	2023	2024	2025	2026	2027
Growth of GDP	1.8	-0.9	-0.5	0.2	0.6	0.9
Consumer Prices*	8.7	6.0	2.5	2.3	2.9	2.7

Note: Percentage change on previous year * Harmonised index of consumer prices. Source: EU Spring Economic Forecast May 2026

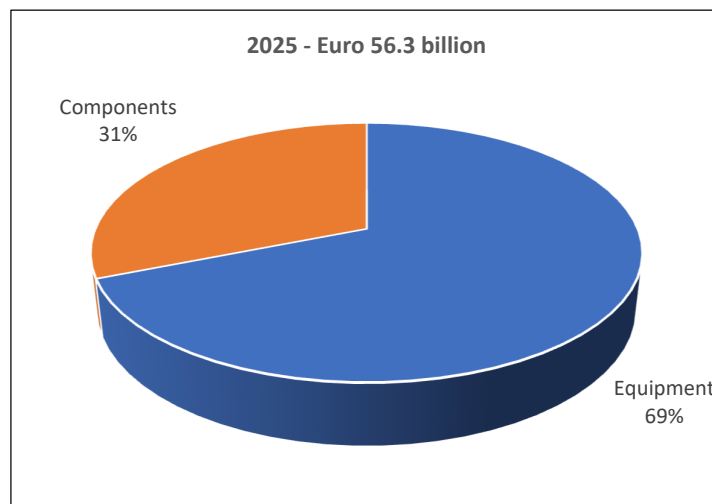
3.6.2 Electronics Industry Overview

Overview

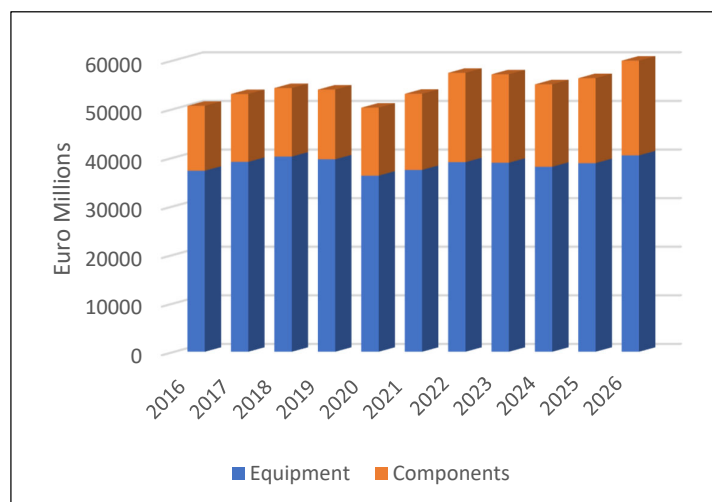
Summary of German Electronics Production 2021-2026

Euro Millions	2021	2022	2023	2024	2025	2026
Computing	2215	2486	2188	2221	2302	2402
Industrial	30232	31369	31442	30543	30941	32204
Communications	4100	4195	4330	4377	4675	4920
Consumer	874	968	948	929	902	890
Components	15666	18389	18196	16968	17487	19495
Total	53087	57407	57104	55038	56307	59911

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.



German Electronics Production 2025



German Electronics Production 2016-2026

Following two years of declining output the German electronics industry saw a gradual recovery over the course of the second half of 2025. As a result output, after declining by 0.5% in 2023 and 3.5% in 2024, posted growth 2.3% in 2025.

Germany is the centre of the European electronics industry. The country is a key export market for most European countries and as such events in Germany will continue to play a pivotal role in the outlook for the European electronics industry.

The country is home to some of the largest European electronic groups. There are also many small and medium-sized companies, primarily privately-owned, which also play an important role in the country's electronics industry.

The automotive industry is a major driver of the German economy and in turn will have a major influence on the broader electronics industry.

Electronics Equipment

Germany's electronics equipment industry is dominated by industrial electronics with control and instrumentation accounting for 58.6% of equipment production and 40.4% of overall electronics output in 2025. Impacted by weak domestic and overseas demand growth was a modest 1.1% in 2023 before declining by 3.2% in 2024. Output rebounded in the second half of 2025 resulting in growth of 2.2% and is forecast to increase by 4.0% in 2026.

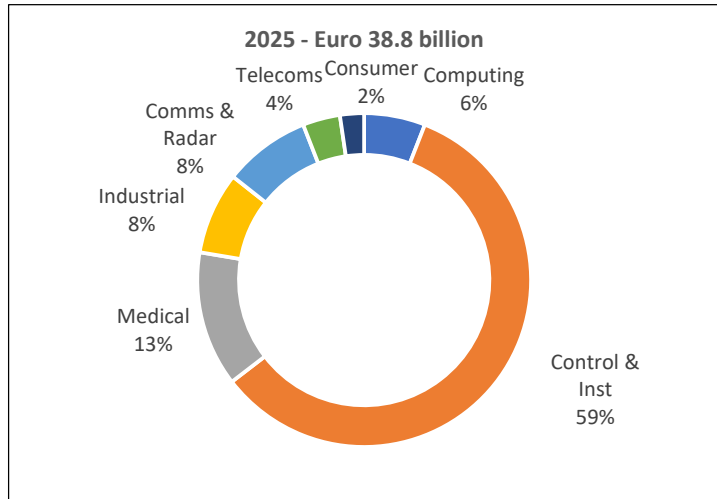
The medical sector after posting robust growth of 7.8% in 2022, declined by 4.0% in 2023 before posting growth of 2.1% in 2024. Growth eased to 0.7% in 2025 but is forecast to accelerate to 4.5% in 2026.

The production of radio communications equipment (including defence) increased by 4.7% in 2024 and a more robust 9.2% in 2025. Double-digit growth in the production of radar and navigation equipment was the primary driver with output of wireless equipment increasing by a modest 2.0% in 2025 although this was an improvement on the 4.3% decline in the prior year.

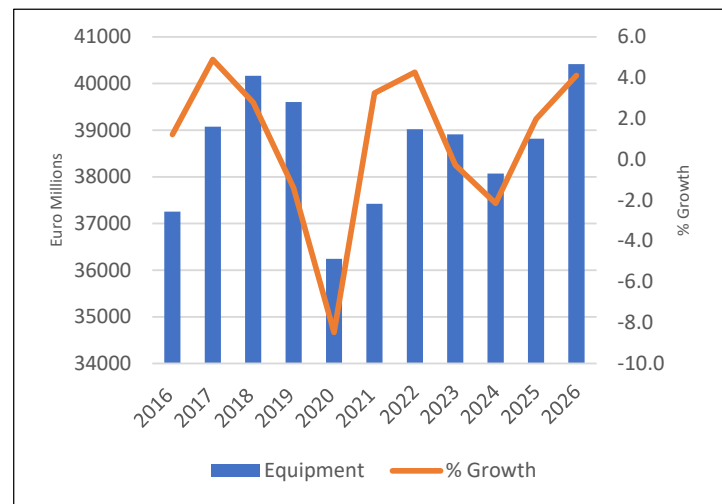
The production of telecommunications equipment, which increased by 3.1% in 2023, declined by 6.0% in 2024 as operators and enterprises scaled back investments. Output however, increased by an estimated 1.7% in 2025 and is forecast to grow by 3.5% in 2026.

Production of computer related equipment in value terms declined by 12.0% in 2023 posted modest growth of 1.8% in 2024 before increasing by 3.7% in 2025 and a forecasted 4.5% in 2026. AI and data centre related investments is supporting growth although this is expected to fade over the period to 2029.

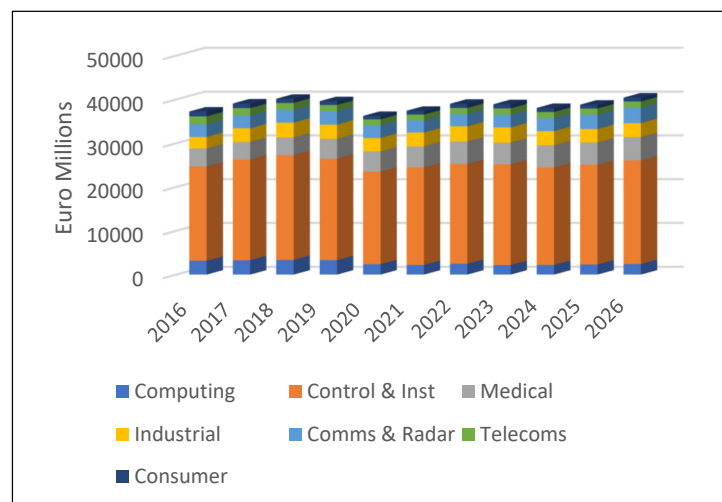
Production of consumer electronics equipment is minimal and accounted for 2.3% of electronics equipment output in 2025.



German Electronics Equipment Production by Sector 2025



German Electronics Equipment Production 2016-2026



German Electronics Equipment Production by Sector 2016-2026

Components

Components accounted for 31.1% of electronics output in 2025.

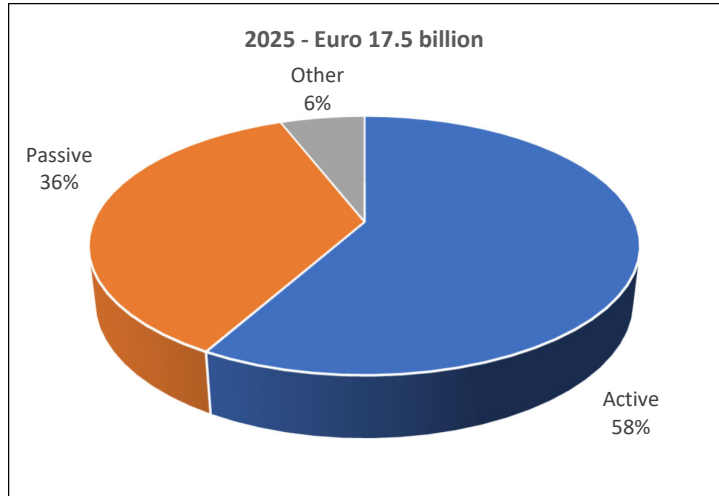
In 2025, the production of active components, after declined by 8.3% in 2024, increased by 1.4% while output of passive and other components increased by 1.4% (2024: -4.8%) and 6.2% (2024: -2.3%), respectively.

Once a major player globally the German photovoltaic industry has gone through a major restructuring in the face of increased competition from Chinese manufacturers and rapidly falling prices. In 2025, the production of photocells in value-terms declined by a further 10% in 2025 this following two years of substantial declines with output down 50.0% in 2024 and 26.8% in 2023. With prices expected to stabilise output is expected to show a modest increase of 2.5% in 2026.

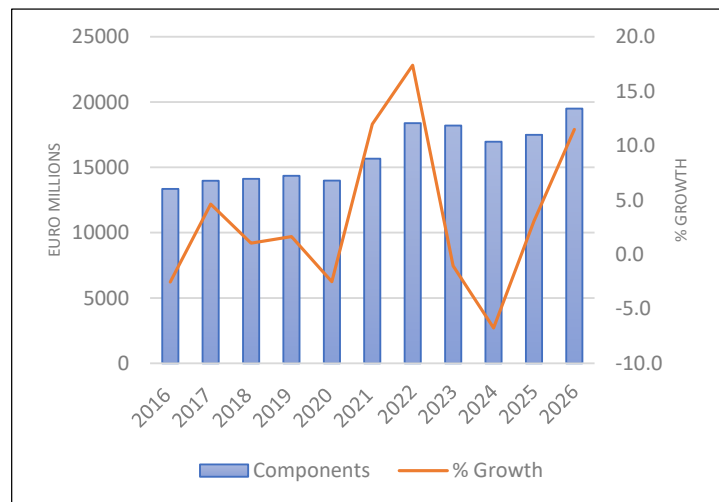
IC output, after declining by 4.3% in 2024, increased by an estimated 6.0% in 2025 on the back of stronger demand in the second half of the year. Growth is forecast to increase by 18.0% in 2026 with further double-digit growth expected in 2027 and 2028.

Looking forward, Germany's IC industry will benefit from TSMC, the world's largest foundry, 70% stake in European Semiconductor Manufacturing Company, a joint venture with Bosch, Infineon and NXP, and on-going investments by Infineon, GlobalFoundries and Bosch.

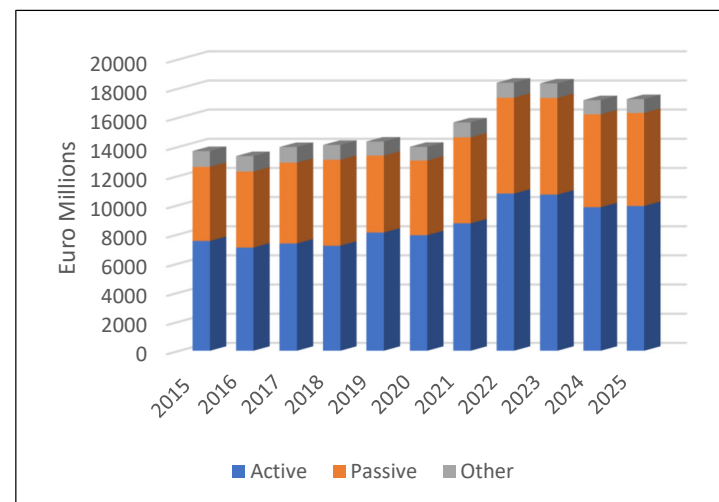
Although PCB production is now primarily undertaken in Asia there are still a number of small and medium-sized manufacturers in the country with the focus on serving the industrial and automotive markets. In 2026, output will benefit from significantly higher prices in the wake of global shortages and increased investment to increase capacity to meet demand.



German Electronics Component Production 2025



German Electronics Component Production 2016-2026



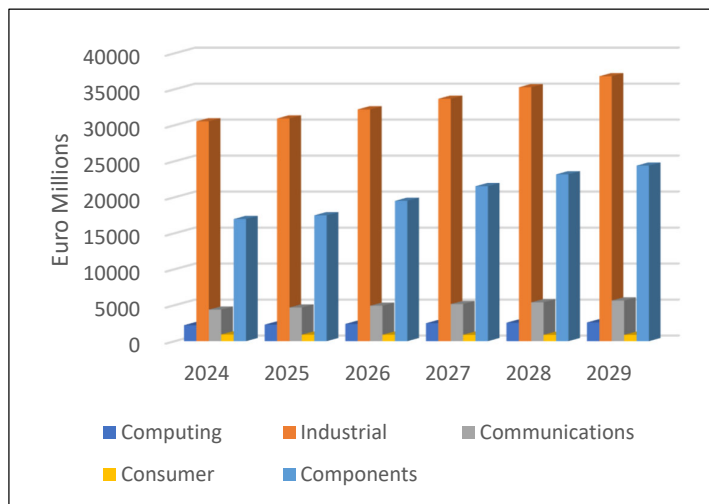
German Electronics Component Production by Sector 2016-2026

Outlook

Summary of German Electronics Production – Medium Term Forecast 2024-2029

Euro Millions	2024	2025	2026	2027	2028	2029
Computing	2221	2302	2402	2498	2570	2606
Industrial	30543	30941	32204	33681	35279	36811
Communications	4377	4675	4920	5152	5397	5644
Consumer	929	902	890	885	881	871
Components	16968	17487	19495	21532	23175	24389
Total	55038	56307	59911	63748	67302	70320

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.



German Electronics Production by Sector 2024-2029

Over the period to 2029 the German electronics industry will continue to be centred on industrial applications and automotive. The recovery witnessed in 2026 is expected to gain momentum in 2027 and 2028 before easing slightly in 2029.

Germany's focus on Industry 4.0 and growth in IoT applications is expected to support growth in both fixed and wireless communications with growth gaining momentum across the forecast period. The surge in defence spending will support strong growth in defence related electronics.

Output in the computer segment is expected to benefit from the production of products related to AI and data centres in 2026 and 2027 although the rate of growth is expected to ease year on year through the period to 2029.

Despite facing increased competition, especially for commodity products, the passive components segment is expected to post low single-digit growth over the forecast period.

Announced investments in semiconductor manufacturing capacity in the country will support growth over the period to 2029.

Although many companies will continue to build on the strategy of "Made in Germany" it is expected that over the period to 2029 an increasing number of OEMs and EMS companies will look at utilising low-cost sites or relocate production to be closer to key emerging markets.

3.9.3 ITALY PRODUCTION

COMPUTING		2023	2024	2025	2026
Complete Systems	€M	329	328	340	363
	\$M	358	357	386	412
Peripherals	€M	110	100	100	105
	\$M	120	109	114	119
Accessories & Parts	€M	265	255	245	252
	\$M	288	277	278	286
Computing Total	€M	704	683	685	719
	\$M	765	742	778	817

OFFICE EQUIPMENT		2023	2024	2025	2026
Office Equipment Total	€M	30	30	30	29
	\$M	33	33	34	33

CONTROL & INSTRUMENTATION		2023	2024	2025	2026
Total Industrial & Process Control	€M	1570	1500	1520	1619
	\$M	1707	1630	1727	1840
Instrumentation					
Analytical Instruments	€M	150	160	165	174
	\$M	163	174	188	198
Nucleonic Instruments	€M	14	14	16	14
	\$M	15	15	18	16
Signal Generators	€M	5	5	11	10
	\$M	5	5	13	11
Telecoms Instruments	€M	16	16	18	18
	\$M	17	17	20	20
Machine & Materials Test Instruments	€M	370	375	375	389
	\$M	402	408	426	443
Electrical Quantity Measuring Instruments	€M	90	90	80	79
	\$M	98	98	91	90
Other Test & Measuring Instruments	€M	1150	1080	1100	1123
	\$M	1250	1174	1250	1276
Total Instrumentation	€M	1795	1740	1765	1808
	\$M	1951	1891	2006	2055
Accessories & Parts	€M	590	515	520	538
	\$M	641	560	591	611
Control & Instrumentation Total	€M	3955	3755	3805	3965
	\$M	4299	4082	4324	4505

ITALY PRODUCTION (ctd)

MEDICAL & INDUSTRIAL		2023	2024	2025	2026
X-Ray & Medical Equipment					
X-Ray Equipment	€M	390	478	425	430
	\$M	424	520	483	488
Electromedical Equipment	€M	630	660	670	709
	\$M	685	717	761	805
Hearing Aids	€M	12	12	12	14
	\$M	13	13	14	16
X-Ray & Medical Equipment Total	€M	1032	1150	1107	1152
	\$M	1122	1250	1258	1310
Industrial Equipment					
Railway & Traffic Signalling Equipment	€M	150	173	188	197
	\$M	163	188	214	224
Other Signalling Equipment	€M	382	396	420	440
	\$M	415	430	477	500
Other Industrial Equipment	€M	65	60	57	61
	\$M	71	65	65	70
Total Industrial Equipment	€M	597	629	665	698
	\$M	649	684	756	793
Medical & Industrial Equipment Total	€M	1629	1779	1772	1851
	\$M	1771	1934	2014	2103

COMMUNICATIONS & RADAR		2023	2024	2025	2026
Radar & Navigational Aids	€M	1400	1500	1700	1840
	\$M	1522	1630	1932	2091
Radio Comms inc Mobile Phones Public Broadcasting & Parts	€M	1090	1060	1055	1080
	\$M	1185	1152	1199	1228
Communications & Radar Total	€M	2490	2560	2755	2920
	\$M	2707	2783	3131	3319

TELECOMMUNICATIONS		2023	2024	2025	2026
Telephone Sets	€M	22	20	18	18
	\$M	24	22	20	21
Other Telecoms Equipment	€M	910	880	850	884
	\$M	989	957	966	1004
Telecommunications Total	€M	932	900	868	902
	\$M	1013	978	986	1025

ITALY PRODUCTION (ctd)

CONSUMER		2023	2024	2025	2026
Video Equipment					
Colour Television	€M	2	2	2	2
	\$M	2	2	2	2
Video Equipment Total	€M	2	2	2	2
	\$M	2	2	2	2
Audio Equipment					
Audio Equipment	€M	1	1	1	1
	\$M	1	1	1	1
Audio Equipment Total	€M	1	1	1	1
	\$M	1	1	1	1
Personal Consumer Equipment					
Electronic Musical Instruments	€M	15	15	14	14
	\$M	16	16	16	16
Electric/Electronic Watches	€M	2	2	2	2
	\$M	2	2	2	2
Electric/Electronic Clocks	€M	3	3	3	3
	\$M	3	3	3	3
Total Personal Equipment	€M	20	20	19	19
	\$M	22	22	22	21
Consumer Equipment Total	€M	23	23	22	21
	\$M	25	25	25	24

COMPONENTS		2023	2024	2025	2026
Active Components					
Valves & Tubes	€M	12	10	12	12
	\$M	13	11	14	14
Diodes	€M	36	30	22	23
	\$M	39	33	25	26
Transistors	€M	365	400	380	409
	\$M	397	435	432	465
Thyristors	€M	14	8	9	9
	\$M	15	9	10	10
Piezoelectric Crystals	€M	9	8	9	9
	\$M	10	9	10	10
Photocells	€M	320	258	240	252
	\$M	348	280	273	286

ITALY PRODUCTION (ctd)

COMPONENTS (ctd)		2023	2024	2025	2026
Active Components					
Other Discrete Semiconductors	€M	83	75	75	79
	\$M	90	82	85	90
ICs & Other Microcircuits	€M	3500	3000	3170	3550
	\$M	3804	3261	3602	4034
Active Components Total	€M	4339	3789	3917	4343
	\$M	4716	4118	4451	4935
Passive Components					
Fixed Capacitors	€M	90	85	85	92
	\$M	98	92	97	105
Variable Capacitors	€M	1	1	1	1
	\$M	1	1	1	1
Resistors	€M	25	20	18	19
	\$M	27	22	20	22
Connectors	€M	470	460	470	501
	\$M	511	500	534	569
Transformers & Inductors	€M	140	150	150	156
	\$M	152	163	170	177
Relays	€M	35	32	30	31
	\$M	38	35	34	35
Switches	€M	130	120	118	123
	\$M	141	130	134	140
Printed Circuit Boards	€M	293	308	315	347
	\$M	318	335	358	394
Total Passive Components	€M	1184	1176	1187	1270
	\$M	1287	1278	1349	1443
Other Components					
Microphones	€M	3	3	3	3
	\$M	3	3	3	3
Loudspeakers	€M	220	240	240	256
	\$M	239	261	273	291
Amplifiers	€M	47	43	40	43
	\$M	51	47	45	49
Aerials	€M	40	35	33	35
	\$M	43	38	38	40
Unrecorded Media	€M	3	3	3	3
	\$M	3	3	3	3

ITALY PRODUCTION (ctd)

COMPONENTS (ctd)		2023	2024	2025	2026
Other Components (ctd)					
Accessories & Parts for	€M	301	313	306	302
Consumer Equipment	\$M	327	340	348	343
Total Other Components		€M	614	637	625
	\$M	667	692	710	729
Total Components Production		€M	6137	5602	5729
	\$M	6671	6089	6510	7107
TOTAL PRODUCTION - ITALY		2023	2024	2025	2026
Total	€M	15900	15332	15666	16662
	\$M	17283	16665	17802	18934

Notes: 2023 and 2024 are current figures at current exchange rates. 2025 is an estimate and 2026 a forecast at 2025 constant values and exchange rates (i.e. inflation is not included). Base year 2025

3.5.4 FRANCE MARKETS

COMPUTING		2023	2024	2025	2026	2027	2028	2029
Computers Total	€M	4620	5111	6713	6933	7794	8291	8571
	\$M	5022	5555	7628	7879	8857	9422	9740
Peripherals	€M	2257	2173	2328	3772	4214	4455	4577
	\$M	2453	2362	2645	4286	4788	5063	5201
Accessories & Parts	€M	1869	1942	2035	3140	3499	3690	3782
	\$M	2032	2111	2313	3568	3976	4193	4298
Computing Total	€M	8746	9226	11076	13845	15506	16437	16930
	\$M	9507	10028	12586	15733	17621	18678	19239

OFFICE EQUIPMENT		2023	2024	2025	2026	2027	2028	2029
Office Equipment	€M	242	234	226	217	208	200	192
	\$M	263	254	257	247	237	227	218
Office Equipment Total	€M	242	234	226	217	208	200	192
	\$M	263	254	257	247	237	227	218

CONTROL & INSTRUMENTATION		2023	2024	2025	2026	2027	2028	2029
Industrial & Process Control								
Total Industrial & Process Control	€M	985	1021	991	1085	1135	1189	1239
	\$M	1071	1110	1126	1233	1290	1351	1409
Instrumentation								
Analytical Instruments	€M	287	299	302	254	264	276	287
	\$M	312	325	343	288	300	314	326
Nucleonic Instruments	€M	129	137	134	92	97	102	107
	\$M	140	149	152	105	110	116	122
Signal Generators	€M	38	30	32	20	18	17	15
	\$M	41	33	36	23	21	19	17
Telecoms Instruments	€M	51	49	49	59	61	63	65
	\$M	55	53	56	67	69	72	74
Machine & Materials Test Instruments	€M	149	135	139	145	151	157	162
	\$M	162	147	158	165	171	178	185
Electrical Quantity Measuring Instruments	€M	87	83	88	90	94	98	102
	\$M	95	90	100	102	107	111	116
Other Test & Measuring Instruments	€M	731	691	698	807	840	876	909
	\$M	795	751	793	916	954	995	1033
Total Instrumentation	€M	1472	1424	1442	1467	1525	1589	1647
	\$M	1600	1548	1639	1667	1733	1805	1872

FRANCE MARKETS (ctd)

CONTROL & INSTRUMENTATION		2023	2024	2025	2026	2027	2028	2029
Control & Instrumentation (ctd)								
Accessories & Parts	€M	570	582	572	582	612	645	676
	\$M	620	633	650	661	695	733	769
Control & Instrumentation Total	€M	3027	3027	3005	3134	3272	3423	3563
	\$M	3290	3290	3415	3562	3718	3889	4049

MEDICAL & INDUSTRIAL		2023	2024	2025	2026	2027	2028	2029
X-Ray & Medical Equipment								
Medical X-Ray Equipment	€M	161	155	154	165	170	174	178
	\$M	175	168	175	188	193	198	203
Industrial X-Ray Equipment	€M	55	62	76	68	70	72	73
	\$M	60	67	86	78	80	81	83
Electrocardiographs	€M	54	61	67	56	57	58	59
	\$M	59	66	76	63	65	66	67
Other Electromedical Equipment	€M	801	824	863	902	952	1004	1053
	\$M	871	896	981	1025	1081	1140	1197
Hearing Aids	€M	153	149	157	188	193	198	203
	\$M	166	162	178	213	219	225	230
X-Ray & Medical Equipment Total	€M	1224	1251	1317	1379	1441	1506	1566
	\$M	1330	1360	1497	1567	1637	1711	1780
Industrial Equipment								
Traffic Signalling Equipment	€M	275	282	289	314	325	337	348
	\$M	299	307	328	357	369	382	396
Other Signalling Equipment	€M	616	584	576	624	652	682	712
	\$M	670	635	655	710	741	774	809
Other Industrial Equipment	€M	205	224	221	188	194	201	208
	\$M	223	243	251	213	221	229	237
Industrial Equipment Total	€M	1096	1090	1086	1126	1171	1219	1268
	\$M	1191	1185	1234	1280	1331	1386	1441
Medical & Industrial Total	€M	2320	2341	2403	2505	2612	2725	2834
	\$M	2522	2545	2731	2847	2968	3097	3221

COMMUNICATIONS & RADAR		2023	2024	2025	2026	2027	2028	2029
Radar & Navigational Aids	€M	1377	1449	1549	1657	1757	1876	2006
	\$M	1497	1575	1760	1883	1997	2132	2280
Radio Comms inc Mobile Phones, Public Broadcasting & Parts	€M	5407	5504	5687	5516	5682	5869	6069
	\$M	5877	5983	6463	6268	6457	6669	6897
Communications & Radar Total	€M	6784	6953	7236	7173	7439	7745	8075
	\$M	7374	7558	8223	8151	8453	8801	9176

FRANCE MARKETS (ctd)

TELECOMMUNICATIONS		2023	2024	2025	2026	2027	2028	2029
Telephone Sets	€M	279	266	251	281	276	272	266
	\$M	303	289	285	319	314	309	303
Other Telecommunications Equipment	€M	1905	1825	1875	1928	2026	2131	2235
	\$M	2071	1984	2131	2191	2302	2422	2540
Telecommunications Total	€M	2184	2091	2126	2209	2302	2403	2501
	\$M	2374	2273	2416	2510	2616	2731	2843
CONSUMER		2023	2024	2025	2026	2027	2028	2029
Video Equipment								
Colour Television	€M	1175	1195	1155	1182	1158	1175	1152
	\$M	1277	1299	1313	1343	1316	1335	1309
DVD Players & Recorders	€M	42	41	36	33	29	27	24
	\$M	46	45	41	38	33	31	27
Video & Digital Still Cameras	€M	307	299	292	272	261	249	239
	\$M	334	325	332	309	297	283	272
Video Tuners & Satellite Receivers	€M	107	102	97	88	83	78	73
	\$M	116	111	110	100	94	89	83
Video Equipment Total	€M	1631	1637	1580	1575	1531	1529	1488
	\$M	1773	1779	1795	1790	1740	1738	1691
Audio Equipment								
Audio Equipment	€M	356	344	324	315	304	293	283
	\$M	387	374	368	358	345	333	321
Audio Equipment Total	€M	356	344	324	315	304	293	283
	\$M	387	374	368	358	345	333	321
Personal Consumer Equipment								
Electronic Musical Instruments	€M	88	80	77	74	75	75	76
	\$M	96	87	88	84	85	86	86
Electric/Electronic Watches	€M	349	348	353	364	374	384	394
	\$M	379	378	401	413	425	437	448
Electric/Electronic Clocks	€M	28	26	25	25	25	25	24
	\$M	30	28	28	29	28	28	28
Electronic Flashlights	€M	4	4	2	3	2	2	2
	\$M	4	4	2	3	3	2	2
Personal Consumer Equipment Total	€M	469	458	457	466	475	486	496
	\$M	510	498	519	529	540	553	564
Consumer Equipment Total	€M	2456	2439	2361	2356	2310	2309	2267
	\$M	2670	2651	2683	2677	2625	2624	2576

FRANCE MARKETS (ctd)

COMPONENTS		2023	2024	2025	2026	2027	2028	2029
Active Components								
Valves & Tubes	€M	183	189	175	180	187	195	203
	\$M	199	205	199	205	213	222	231
Diodes	€M	182	169	170	181	193	202	210
	\$M	198	184	193	206	219	230	239
Transistors	€M	231	199	190	205	220	232	242
	\$M	251	216	216	233	250	264	275
Other Discrete Semiconductors	€M	1694	1338	1180	1166	1228	1300	1375
	\$M	1841	1454	1341	1325	1395	1477	1563
ICs & Other Microcircuits	€M	1940	1751	1804	2580	3044	3257	3420
	\$M	2109	1903	2050	2932	3459	3701	3886
Active Components Total	€M	4230	3646	3519	4312	4872	5186	5450
	\$M	4598	3963	3999	4900	5536	5893	6193
Passive Components								
Electrolytic Capacitors	€M	74	68	67	72	78	82	86
	\$M	80	74	76	82	89	93	98
Other Fixed Capacitors	€M	141	133	128	143	156	166	173
	\$M	153	145	145	163	177	189	197
Variable Capacitors	€M	2	2	1	1	1	1	1
	\$M	2	2	1	1	1	1	1
Resistors	€M	105	101	103	112	121	126	132
	\$M	114	110	117	127	138	143	150
Variable Resistors	€M	28	27	21	20	19	19	18
	\$M	30	29	24	23	22	22	20
Connectors	€M	826	813	825	881	935	982	1025
	\$M	898	884	938	1001	1063	1116	1165
Small Transformers	€M	156	148	152	159	165	172	178
	\$M	170	161	173	181	188	195	202
Relays	€M	56	50	48	50	52	54	56
	\$M	61	54	55	57	59	61	64
Switches	€M	99	94	95	99	103	107	111
	\$M	108	102	108	113	117	122	126
Printed Circuit Boards	€M	479	459	461	498	525	548	572
	\$M	521	499	524	566	597	623	650
Passive Components Total	€M	1966	1895	1901	2035	2155	2257	2352
	\$M	2137	2060	2160	2313	2449	2565	2673

FRANCE MARKETS (ctd)

COMPONENTS		2023	2024	2025	2026	2027	2028	2029
Other Components								
Microphones	€M	39	39	40	41	43	44	45
	\$M	42	42	45	47	49	50	51
Loudspeakers	€M	404	381	381	394	406	417	428
	\$M	439	414	433	448	461	474	486
Amplifiers	€M	13	11	10	10	9	9	9
	\$M	14	12	11	11	10	10	10
Aerials	€M	64	61	61	61	60	59	57
	\$M	70	66	69	69	68	67	65
Unrecorded Media	€M	109	103	96	93	89	86	83
	\$M	118	112	109	106	101	98	94
Accessories & Parts for Consumer Equipment	€M	309	316	311	319	327	335	343
	\$M	336	343	353	363	372	381	390
Other Components Total	€M	938	911	899	918	934	950	965
	\$M	1020	990	1022	1043	1061	1080	1097
Components Total	€M	7134	6452	6319	7265	7961	8393	8767
	\$M	7754	7013	7181	8256	9047	9538	9963

TOTAL MARKET - FRANCE		2023	2024	2025	2026	2027	2028	2029
TOTAL MARKET	€M	32893	32763	34752	38704	41611	43634	45129
	\$M	35753	35612	39491	43982	47285	49584	51283

Notes: 2023 and 2024 are current figures at current exchange rates

2025 is an estimate and 2026 to 2029 are forecasts at 2025 constant values & exchange rates (i.e. Inflation is not included)

Base year 2025

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