

ANC Headphones - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The ANC Headphones Market size is estimated at USD 17.88 billion in 2024, and is expected to reach USD 34.42 billion by 2029, growing at a CAGR of 14% during the forecast period (2024-2029).

The growing acceptance of smart wearables, such as wireless headphones with active noise-canceling, has augmented hearing and increased control over ambient sounds, propelling the demand for active noise-canceling headphones.

Key Highlights

- The growing awareness toward hearing disorders, the transition to being hearable in the connected environment, the increasing number of smartphone users and tech-savvy consumers, and the adoption of new audio technology are some prominent factors expected to drive the ANC headphones market. According to Ericsson, the number of smartphone subscriptions worldwide surpasses six billion and is expected to grow by several hundred million in the next few years. China, India, and the United States have the highest number of smartphone users.
- The growing inclination of consumers toward headphones that offer higher audio quality encourages audio device companies to incorporate advanced technologies and provide noise-canceling features in headphones, further fuelling the market growth. For instance, in September 2022, Bose launched another pair of headphones, QuietComfort SE. The new QuietComfort SE was rebranded with minor improvements to the Bose QuietComfort 45, which was replaced by Bose QuietComfort 35 II. The QuietComfort SEs deliver 24-hour playtime on a single charge and need 2.5 hours to get fully recharged. A 15-minute short mission is enough for a 3-hour playback.
- The rise in digital platform penetration and the surge in intelligent devices allow several music and entertainment customers to use wireless ANC headphones for better quality. According to IBEF, MeitY collaborated with Amazon Web Services (AWS) to establish a quantum computing applications lab in India to accelerate quantum computing-driven research and development and

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enable new scientific discoveries. Some vendors are focusing on launching competitive prices at lower prices to make their products popular among consumers. For instance, Sony kept the price of its noise-cancellation headphone at just USD 68 on Amazon Prime Day Sale. The availability of noise-canceling headphones at a lower price may further drive market growth. Furthermore, the need for high capital and technological expertise may be significant barriers to the entrance of small and medium-scale manufacturers into the active noise-canceling headphones market. In-ear active noise-canceling headphones are likely to witness traction during the forecast period. A significant reason for the high market penetration of these headphones is their cost-efficiency. Further, the increased adoption of in-ear headphones by sports and music enthusiasts is another factor for the high application of in-ear headphones.

Active Noise Cancellation Headphones Market Trends

Increasing Adoption of Smart Phones is Expected to Drive the Market Growth

- The increasing penetration of smartphones and connected mobile phones is driving the demand for active noise-canceling headphones worldwide. Vendors are incorporating several smart and intelligent features in their products, affecting the global sale of active noise-cancellation headphones. There is a high demand for innovative entry-level products in developing countries, which local manufacturers currently fulfill.
- In September 2022, Sony added to its smartphone lineup with its latest launch, the Xperia 5 IV. The compact smartphone has a smaller screen but can easily compete with the other flagships with its big-phone features. The device comes with a 6.1-inch OLED display with a refresh rate of 120 Hz, which is said to be 50% brighter than the Xperia 5 III's panel.
- According to CISCO Annual Internet Report, 2018-2023, the total number of global mobile subscribers is expected to rise from 5.6 billion in 2022 to 5.7 billion by 2023. The increasing number of mobile subscribers represents a positive outlook for the market.
- The increasing trend of making smartphones slimmer and thinner has resulted in manufacturers removing the headphones jack. This propels consumers to adopt advanced headphones with unique features, which will likely boost the market growth over the forecast period. Further, in January 2022, according to the US Census Bureau, the sales of smartphones sold in the United States increased by USD 1.7 billion to USD 74.7 billion.
- Furthermore, according to IBEF, shipments of "Made in India" smartphones increased 7% Y-o-Y in Q1 of this year, reaching over 48 million units, while over 190 million smartphones made in India were shipped.

Asia-Pacific to Experience Significant Market Growth

- Asia-Pacific is anticipated to register the fastest growth over the forecast period, owing to some major players in the region. The presence, coupled with the extensive research and development activities carried out by these players, has resulted in the region's wide-scale adoption of active noise-cancellation headphones.
- In February 2022, Sony expanded its product lineup with the launch of Sony WH-XB910N noise-canceling headphones. The Bluetooth headphones have active noise cancellation functionality and are part of the company's Extra Bass range. The headphones come with LDAC support and offer up to 30 hours of battery backup on a single charge.
- Asia-Pacific players are introducing innovative features of noise-canceling headphones to meet the dynamic consumer demands and attract a large consumer base in the region. Furthermore, the adoption of innovative marketing strategies is expected to emerge as a popular trend among noise-canceling headphones market players in the Asia-Pacific region in the upcoming years.
- Further, emerging markets in Asian countries have witnessed an unexpected growth in the demand for premium headphones, which can be attributed to the rising disposable income. Moreover, they are adopting smart headphones with add-on

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functionalities, such as active noise cancellation, augmented hearing, and higher control over ambient sounds.

- For instance, in April 2022, Sennheiser, the German audio giant, established CX Plus and CX True Wireless (TWS) earphones in the Indian market. With added qualities such as Active Noise Cancellation and transparent hearing, the new CX Plus earphones create a companion for everyday listening. Sennheiser's range of unique TWS earphones features the proprietary True Response transducer, developed for Sennheiser's range of premium earphones.

- Furthermore, the penetration by foreign players in the region providing technologically advanced premium products and better experiences has fueled the demand for active noise cancellation headphones. This is expected to drive market growth over the forecast period.

Active Noise Cancellation Headphones Industry Overview

The active noise cancellation headphones market is favorably competitive due to few competitors in the market. Market players and stakeholders are constantly adopting creative technologies and trying to roll out new features of noise-canceling headphones to maintain an edge in the market as the technologies and preferences of consumers are continuously evolving.

- February 2022: Boat added another headphone to its portfolio. The homegrown firm launched boAt Nirvana 751 headphones in India. The boAt Nirvana is the company's first wireless headphones with active noise cancellation. There is a dedicated button to activate noise cancellation. The headphones also come with up to 65 hours of playback, fast charging, and other essential features.

- January 2022: Sennheiser extended its audio product lineup with the launch of Sennheiser HD 450SE wireless headphones. The headphones come with active noise cancellation and offer similar features to HD 450BT headphones. The latest Bluetooth headphones from Sennheiser come with built-in Alexa support, Google Assistant, and Siri. The headphones feature a foldable design and have a frequency response capacity of 18Hz to 22,000Hz.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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