

True Wireless Headphones Market - Global Outlook & Forecast 2024-2029

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Report description:

The global true wireless headphones market by revenue is expected to grow at a CAGR of 17.09% from 2023 to 2029.

SEGMENTATION INSIGHTS

INSIGHTS BY FEATURE

Smart true wireless earphones (TWH) are gaining prominence in the global true wireless headphones market; it's interesting to note that the market share between smart and non-smart TWH remains relatively close, with neither significantly outweighing the other. The smart headphones often come equipped with built-in voice assistants (like Siri or Google Assistant), touch controls for music playback and calls, integration with fitness tracking apps, and customizable sound profiles. Examples of smart true wireless headphones include Apple AirPods Pro, which features seamless integration with Apple devices, and Sony WF-1000XM4 and WF-1000XM3, which offer industry-leading noise cancellation and support for virtual assistants like Google Assistant and Amazon Alexa fall under the category of smart true wireless headphones. Furthermore, the continued presence of non-smart TWH suggests that a segment of consumers still prioritize simplicity and affordability over additional smart features. The relatively balanced market share between smart and non-smart TWH underscores the importance of offering diverse product options to cater to varying consumer preferences and needs.

Segmentation by Feature

- ☒ Smart
- ☐ Non-Smart

INSIGHTS BY PRICE

In terms of price segmentation, the low-price range dominates the global true wireless headphones market, driven by the entry of new vendors targeting budget-conscious consumers. This segment experiences significant expansion due to its affordability and

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accessibility. Meanwhile, mid-range products demonstrate moderate growth, while premium offerings stand out for their advanced features, including multiple sensors.

The lower price segment further diversifies into multiple sub-segments, reflecting the availability of products across various price points. This shift of features from premium to mid-range and low-range products has bolstered sales in these segments, overshadowing the premium segment to some extent. However, demand for premium products persists among specific consumer segments, such as corporate professionals, gamers, and white-collar workers, who prioritize advanced features and functionality. This trend underscores the market's segmentation based on consumer preferences and purchasing power across different price tiers.

Segmentation by Price

- Premium
- Moderate
- Low

INSIGHTS BY NOISE CANCELLATION

Despite active noise cancellation (ANC) growth, passive noise-canceling earphones still maintain a significant true wireless headphones market share. Passive noise canceling relies on the physical design of the earphones to block out external noise without the need for electronic components. This technology is often more cost-effective than ANC, making it accessible to a broader range of consumers, particularly those prioritizing affordability. Despite the advanced technology involved, the affordability of true wireless headphones with ANC varies depending on the brand and model. While premium brands like Apple and Sony typically offer feature-rich products at higher prices, more affordable options are available from Soundcore and Jabra. For example, Soundcore's Liberty Air 2 Pro and Jabra's Elite 85T offer ANC functionality at relatively lower prices than premium counterparts.

Segmentation by Noise Cancellation

- Active
- Passive

INSIGHTS BY DISTRIBUTION CHANNEL

In the distribution channel landscape, e-commerce emerges as a pivotal player, significantly impacting the global true wireless headphones market. The proliferation of e-commerce platforms offering a diverse range of true wireless headphones at competitive prices has spurred consumer interest and purchases. Intense competition among e-commerce channels, particularly in emerging markets like Asia-Pacific, has led to price reductions, making the products more accessible to a wider consumer base. Notably, a substantial majority, more than 70%, of consumers prefer to explore e-commerce websites before making a purchase decision, highlighting the channel's significance. Furthermore, social media also wields considerable influence on the sales of true wireless earphones, with positive reviews and comprehensive product information contributing to consumer awareness and purchase intent. New entrants in the true wireless headphones market often leverage attractive financing options to entice consumers, particularly for premium products.

Segmentation by Distribution Channel

- E-commerce Sites
- Vendor Stores & Sites
- Mass Market Players
- Specialty Stores
- Online Music Stores

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-□Electronic Stores

GEOGRAPHICAL ANALYSIS

The dominance of the Asia-Pacific (APAC) region in both volume and revenue within the global true wireless headphones market is remarkable, accounting for more than 40% of the market share. Europe and North America follow this robust performance. Within the APAC region, China emerges as a key contributor to the true wireless earphones market, driven by its large population and rapidly growing consumer electronics market. The sheer size of the Chinese market, coupled with increasing disposable incomes and technological advancements, fuels the demand for true wireless earphones at a higher rate. Furthermore, emerging markets like India also play a crucial role in driving the growth of APAC's true wireless earphones market. With a burgeoning population and rising consumer spending, India presents lucrative opportunities for companies looking to expand their regional presence. The demand for low-cost TWH is high in this region compared to the high demand for premium products in North America and Europe. North America and Europe exhibit a higher demand for premium true wireless earphones. Consumers in North America and Europe generally have higher disposable incomes, allowing them to invest in higher-end electronic products. Premium true wireless earphones with advanced features and superior sound quality appeal to this demographic. In addition, these markets have a strong tech-savvy culture, with consumers willing to invest in cutting-edge technology and innovative features. Premium true wireless earphones cater to this demand by offering the latest advancements in audio technology, and true wireless earphones are often seen as fashion accessories and lifestyle statements.

Segmentation by Geography

-□North America

o□US

o□Canada

-□Europe

o□UK

o□Germany

o□France

o□Italy

o□Spain

o□Nordic

o□Switzerland

o□Benelux

o□Russia

-□APAC

o□China

o□Japan

o□South Korea

o□India

o□Australia

-□Latin America

o□Brazil

o□Mexico

o□Chile

o□Argentina

o□Colombia

o□Peru

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- Middle East & Africa
- o□South Africa
- o□Turkey
- o□UAE

VENDOR LANDSCAPE

Apple indeed holds a dominant position in the global true wireless headphones market, commanding over 30% of the market share globally. Samsung is closely behind, a testament to the stronghold of these tech giants in the industry. Additionally, brands like Xiaomi, boAt, and Skullcandy have secured significant market share worldwide, contributing to the competitive landscape. Among these brands, boAt stands out for its remarkable growth trajectory, particularly in market share. With a strategic focus on the middle and low pricing range, boAt has successfully tapped into a segment of consumers seeking affordable yet quality true wireless earphones.

The growing adoption of new products in emerging markets like China, Brazil, and India presents lucrative opportunities for companies in the true wireless headphones market to expand their market presence. Companies are tailoring their product offerings to cater to consumers' preferences and purchasing power in these regions to capitalize on this trend. In contrast, premium brands such as Apple and Samsung continue to compete in the premium pricing segment, leveraging their brand reputation and technological innovation to attract discerning consumers willing to invest in high-end true wireless earphones. However, despite the intense competition and innovation in the market, macroeconomic factors have occasionally led companies to postpone their product launches. Overall, the true wireless headphones market is highly competitive, with various brands vying for market share across different pricing segments and geographical regions.

Key Company Profiles

- Apple
- Samsung
- Sony
- Xiaomi
- Skullcandy

Other Prominent Vendors

- Huawei
- AKG
- Anker Soundcore
- Audio - Technica
- Avanca International BV
- Bang & Olufsen
- Beats By Dre
- Blaupunkt
- Boat
- Bose
- Boult
- Creative Technology Ltd
- Grado
- Huawei
- Infinity by Harman

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- Jabra
- JAM
- Jaybird
- Jays Headphones
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- Lenovo
- LG
- Lypertek
- Master & Dynamic
- Meizu
- Monoprice
- MIVI
- Motorola
- Mymanu
- Noise
- Nokia
- Nuheara
- Onkyo & Pioneering
- OnePlus
- Panasonic
- Philips
- pTron
- RHA
- Sennheiser
- Sonun
- Soundpeats
- Treblab
- Truke
- Westone
- 1More

KEY QUESTIONS ANSWERED:

1. How big is the true wireless headphones market?
2. What is the growth rate of the global true wireless headphones market?
3. Who are the key players in the global true wireless headphones market?

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