

Electrical Goods Retailing - Italy - February 2020

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- How can store-based retailers differentiate themselves from online specialists?
- Where now for the online channel?

Consumer spending on electrical goods has been growing at a faster rate in Italy than total spending during the past five years, demonstrating that, despite the weak nature of the Italian economy, consumers have been prepared to spend on items that are important to them. While there is no doubt that there is a shift in the balance of sales from stores to the online channel, the major store-based retailers are mitigating this through aggressive expansion of their online platforms, both organic and through acquisition.



“Despite the moribund nature of the Italian economy, consumers have shown themselves to be willing to spend on electrical goods over the past few years. The market is characterised by an intensely competitive retail landscape, with two strong major store-based retailers going head-to-head with Amazon and, so far, holding their own in terms of market share.”

– Michael Oliver, Senior

etail Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Areas covered in this report**

EXECUTIVE SUMMARY

- **The market**
- **Consumer spending**
Figure 1: Italy: Consumer spending on electrical items (including VAT), 2015-19
- **Sector size and forecast**
Figure 2: Italy: Electrical goods specialists' sales, excluding VAT, 2015-19
- **Channels of distribution**
Figure 3: Italy: estimated distribution of spending on electrical/electronic goods by channel, 2019
- **Companies and brands**
- **Key metrics**
- **Market shares**
Figure 4: Italy: Leading electrical specialists' shares of spending on electricals, 2019
- **Online**
- **The consumer**
- **What they buy**
Figure 5: Italy: electrical products purchased in the last 12 months, November 2019
- **How they shop**
Figure 6: Italy: Channels used to buy electrical goods, in-store and online, November 2019
- **Where they shop**
Figure 7: Italy: where they shop for electricals, November 2019
- **Attitudes to shopping for electricals**
Figure 8: Italy: attitudes to shopping for electrical/electronic goods, November 2019
- **What we think**

ISSUES AND INSIGHTS

- **How can store-based retailers differentiate themselves from online specialists?**
- **The facts**
- **The implications**
- **Where now for the online channel?**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- The facts
- The implications

THE MARKET – WHAT YOU NEED TO KNOW

- **Electricals spending grows faster than average**
- **Specialists' share of retail sales holds firm**
- **Deflation impacts on most electrical goods categories**
- **Specialists still the most popular outlet type**

CONSUMER SPENDING

- **Italy narrowly avoids recession**
- **Electricals spending grows faster than average**

Figure 9: Italy: Consumer spending on electrical items (including VAT), 2015-19

SECTOR SIZE AND FORECAST

- **Specialists' share of retail sales holds firm**

Figure 10: Italy: Electrical goods specialists, sales, excluding VAT, 2015-19

Figure 11: Italy: Electrical goods specialists, forecast sales, excluding VAT, 2020-24

INFLATION

- **Deflation impacts on most electrical goods categories**

Figure 12: Italy: Consumer prices, Annual % change, 2014-19

Figure 13: Italy: Consumer price inflation on electrical items, annual % change, July 2018-December 2019

CHANNELS OF DISTRIBUTION

- **Specialists still the most popular outlet type**

Figure 14: Italy: estimated distribution of spending on electrical/electronic goods by channel, 2019

COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- **Expert heads market by virtue of Unieuro**
- **Unieuro growth driven by combination of factors**
- **Media World loses ground**
- **Amazon outstrips overall market growth but lags behind Unieuro online growth**
- **Unieuro consolidates position as market-leading chain**
- **Electricals is one of most developed online sectors in Italian online retailing**
- **Amazon is clear online leader but specialists hold their own**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

LEADING PLAYERS

- **Expert heads market by virtue of Unieuro**
- **Unieuro growth driven by combination of factors**
- **Media World loses ground**
- **Euronics, Trony and Comet**
- **Amazon outstrips overall market growth but lags behind**

Unieuro online growth

Figure 15: Italy: Leading electrical specialists, sales, 2015-19

Figure 16: Italy: Leading electrical specialists, outlets, 2015-19

Figure 17: Italy: Leading electrical specialists, sales per outlet, 2015-19

MARKET SHARES

- **Unieuro consolidates position as market-leading chain**

Figure 18: Italy: Leading electrical specialists' shares of spending on electricals, 2015-19

ONLINE

- **Broadband access**
- **Technology ownership**
- **Online activity**

Figure 19: Italy: online purchasing in the past 12 months compared to other major European economies, 2015-19

- **Online purchasing of electrical goods**

Figure 20: Italy: online purchasing of electrical items in the last 12 months, 2009-19

- **Online sales**
- **Leading online players**

Figure 21: Italy: Estimated sales of electricals online by leading retailers, 2015-19

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Mobile phones still the most purchased electrical product**
- **Stores are the most popular place to buy**
- **Amazon leads the way**
- **Retailers face an uphill struggle to shift the focus away from price**

WHAT THEY BUY

- **Mobile phones and small appliances are most popular purchases**

Figure 22: Italy: electrical products purchased in the last 12 months, November 2019

- **Men much more likely than women to buy electrical goods**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Italy: electrical products purchased in the last 12 months, by gender, November 2019

- **Purchasing of electricals biased towards younger age groups**

Figure 24: Italy: electrical products purchased in the last 12 months, by age, November 2019

HOW THEY SHOP – ONLINE AND IN-STORE

- **In-store remains the most popular channel for electricals**

Figure 25: Italy: Channels used to buy electrical goods, in-store and online, November 2019

- **Women much more likely than men to prefer stores**

Figure 26: Italy: Channels used to buy electrical goods, in-store and online, by gender and age, November 2019

WHERE THEY SHOP

- **Three-quarters buy through a store-based specialist**

Figure 27: Italy: where they shop for electricals, November 2019

Figure 28: Italy: profile of electricals shoppers by retailer used, November 2019

- **One-third of in-store shoppers have also bought at Amazon**

Figure 29: Italy: where they shop for electricals, by channel used to buy electricals, November 2019

- **Media World is most reliant on shoppers who only buy in-store**

Figure 30: Italy: Where they shop for electricals (leading retailers), by channel used, November 2019

ATTITUDES TO SHOPPING FOR ELECTRICALS

Figure 31: Italy: attitudes to shopping for electricals, November 2019

- **Attitudes to shopping for electricals by channels used**

Figure 32: Italy: attitudes to shopping for electricals, by channels used, November 2019

- **Attitudes to shopping by retailer used**

Figure 33: Italy: attitudes to shopping for electricals, by where they shop (leading retailers) for electricals, November 2019

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Data sources**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

AMAZON

- **What we think**
- **Prime: the glue keeping the consumer facing business units together**
- **Consumer electronics: half of UK households have an Amazon device**
- **Retail: Will Marketplace become a problem child?**
- **Company background**
- **Company performance**
Figure 34: Amazon: sales by activity, 2019
- **Mintel estimates**
Figure 35: Amazon.com Group: Group financial performance, 2015-19
Figure 36: Amazon International: estimated retail sales performance, 2015-19
- **Sales of electrical goods**
Figure 37: Amazon Europe: estimated sale of electrical products, 2019
- **Retail offering**
- **Product mix**
Figure 38: Amazon UK: estimated sales by product, 2018
- **Marketing**

CECONOMY (MEDIAMARKT/SATURN)

- **What we think**
- **Sharpening the focus of the business**
- **Role of stores is changing**
- **Online wobbles towards the end of 2018/19**
- **Where now?**
- **Company background**
- **Company performance**
Figure 39: MediaMarkt/Saturn: Group financial performance, 2014/15-2018/19
Figure 40: MediaMarkt/Saturn: Outlet data, 2014/15-2018/19
- **Retail offering**

THE EUROPEAN BUYING GROUPS

- **What we think**
- **Growth at group level**
- **Store numbers falling**
- **Online is difficult for voluntary groups**
- **Can customer service offset higher prices ?**
- **Looking ahead...**
- **Sales**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: Euronics and Expert: Selected countries, sales performance, 2014-18

- **Stores**

Figure 42: Euronics and Expert: Selected countries, store numbers, 2014-18

Figure 43: Euronics and Expert: countries of operation with local websites, 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.