

# Consumer Appliances in Brazil

December 2023

Table of Contents

## Consumer Appliances in Brazil

#### **EXECUTIVE SUMMARY**

Consumer appliances in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer appliances?

## MARKET INDICATORS

- Table 1 Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024
- Table 2 Replacement Cycles of Consumer Appliances by Category 2018-2024

#### MARKET DATA

- Table 3 Sales of Consumer Appliances by Category: Volume 2018-2023
- Table 4 Sales of Consumer Appliances by Category: Value 2018-2023
- Table 5 Sales of Consumer Appliances by Category: % Volume Growth 2018-2023
- Table 6 Sales of Consumer Appliances by Category: % Value Growth 2018-2023
- Table 7 Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023
- Table 8 Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023
- Table 9 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023
- Table 10 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023
- Table 11 Sales of Small Appliances by Category: Volume 2018-2023
- Table 12 Sales of Small Appliances by Category: Value 2018-2023
- Table 13 Sales of Small Appliances by Category: % Volume Growth 2018-2023
- Table 14 Sales of Small Appliances by Category: % Value Growth 2018-2023
- Table 15 NBO Company Shares of Major Appliances: % Volume 2019-2023
- Table 16 LBN Brand Shares of Major Appliances: % Volume 2020-2023
- Table 17 NBO Company Shares of Small Appliances: % Volume 2019-2023
- Table 18 LBN Brand Shares of Small Appliances: % Volume 2020-2023
- Table 19 Distribution of Major Appliances by Format: % Volume 2018-2023
- Table 20 Distribution of Small Appliances by Format: % Volume 2018-2023
- Table 21 Forecast Sales of Consumer Appliances by Category: Volume 2023-2028
- Table 22 Forecast Sales of Consumer Appliances by Category: Value 2023-2028
- Table 23 Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028
- Table 24 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028
- Table 25 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028
- Table 26 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028
- Table 27 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028
- Table 28 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028
- Table 29 Forecast Sales of Small Appliances by Category: Volume 2023-2028
- Table 30 Forecast Sales of Small Appliances by Category: Value 2023-2028
- Table 31 Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028
- Table 32 Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

# DISCLAIMER

## SOURCES

Summary 1 - Research Sources

# Dishwashers in Brazil

# KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Moderate optimism for dishwashers with double-digit retail value growth Improving sales for both retail offline and online channels

Product availability and diversification increase competitiveness in Brazil

#### PROSPECTS AND OPPORTUNITIES

Growing popularity of dishwashers on social media

Possible end to instalment payments could hinder consumption power in Brazil

Improved economic and social drivers to potentially drive up demand for dishwashers

# **CATEGORY DATA**

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023

Table 34 - Sales of Dishwashers by Category: Value 2018-2023

Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023

Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023

Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023

Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2019-2023

Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023

Table 40 - LBN Brand Shares of Dishwashers: % Volume 2020-2023

Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023

Table 42 - Production of Dishwashers: Total Volume 2018-2023

Table 43 - Forecast Sales of Dishwashers by Category: Volume 2023-2028

Table 44 - Forecast Sales of Dishwashers by Category: Value 2023-2028

Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028

Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

# Home Laundry Appliances in Brazil

#### **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Washer dryers and washing machines help stabilise category's performance

Promotional deals positively influence purchasing decisions

Product launches to improve consumers' laundry experience

## PROSPECTS AND OPPORTUNITIES

Products advance through premiumisation and sustainable footprint

Greater competition presents challenges to home laundry appliance players

Changes to financial legislation and government subsidies are set to impact demand for home laundry appliances

## **CATEGORY DATA**

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2018-2023

Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023

Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023

Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023

Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023

Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2018-2023

Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023

Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023

Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023

Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023

Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023

Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023

- Table 59 Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028
- Table 60 Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028
- Table 61 Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028
- Table 62 Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

# Large Cooking Appliances in Brazil

#### **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Better performance by large cooking appliances in 2023 Players leverage affordability, durability and designs with new launches

Brand loyalty is threatened and benefits low-tier brands

#### PROSPECTS AND OPPORTUNITIES

Brastemp's innovation addresses the needs of Generation Z

Innovation across retail channels to gain consumer interest and loyalty

Possible legislation changes to influence demand for large cooking appliances

#### **CATEGORY DATA**

- Table 63 Sales of Large Cooking Appliances by Category: Volume 2018-2023
- Table 64 Sales of Large Cooking Appliances by Category: Value 2018-2023
- Table 65 Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023
- Table 66 Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023
- Table 67 Sales of Built-in Hobs by Format: % Volume 2018-2023
- Table 68 Sales of Ovens by Smart Appliances: % Volume 2019-2023
- Table 69 NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023
- Table 70 LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023
- Table 71 NBO Company Shares of Built-in Hobs: % Volume 2019-2023
- Table 72 NBO Company Shares of Ovens: % Volume 2019-2023
- Table 73 NBO Company Shares of Cooker Hoods: % Volume 2019-2023
- Table 74 NBO Company Shares of Built-in Cooker Hoods: % Volume 2019-2023
- Table 75 NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023
- Table 76 NBO Company Shares of Cookers: % Volume 2019-2023
- Table 77 Distribution of Large Cooking Appliances by Format: % Volume 2018-2023
- Table 78 Production of Large Cooking Appliances: Total Volume 2018-2023
- Table 79 Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028
- Table 80 Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028
- Table 81 Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028
- Table 82 Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

# Microwaves in Brazil

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Economic drivers and consumer confidence influence sales of microwaves

Retail transformation is necessary to captivate consumers

Panasonic features surprising product innovation

# PROSPECTS AND OPPORTUNITIES

Freestanding remains dominant format of microwaves in Brazil

Future opportunities should increase penetration of Brazilian households

Legislation on instalment payments can potentially influence consumer sentiment

#### CATEGORY DATA

- Table 83 Sales of Microwaves by Category: Volume 2018-2023
- Table 84 Sales of Microwaves by Category: Value 2018-2023
- Table 85 Sales of Microwaves by Category: % Volume Growth 2018-2023
- Table 86 Sales of Microwaves by Category: % Value Growth 2018-2023
- Table 87 Sales of Microwaves by Smart Appliances: % Volume 2019-2023
- Table 88 NBO Company Shares of Microwaves: % Volume 2019-2023
- Table 89 LBN Brand Shares of Microwaves: % Volume 2020-2023
- Table 90 Distribution of Microwaves by Format: % Volume 2018-2023
- Table 91 Production of Microwaves: Total Volume 2018-2023
- Table 92 Forecast Sales of Microwaves by Category: Volume 2023-2028
- Table 93 Forecast Sales of Microwaves by Category: Value 2023-2028
- Table 94 Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028
- Table 95 Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

# Refrigeration Appliances in Brazil

# KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fridge freezers and wine coolers positively contribute to category growth

Low production growth as consumption levels improve

Premiumisation as a strategy to creating wider brand awareness

### PROSPECTS AND OPPORTUNITIES

Phygital strategies should transform appliance retailing over the forecast period

Brazilian consumers increasingly interested in smart kitchen appliances

Consumer confidence and lower inflationary pressure set to influence future growth

#### **CATEGORY DATA**

- Table 96 Sales of Refrigeration Appliances by Category: Volume 2018-2023
- Table 97 Sales of Refrigeration Appliances by Category: Value 2018-2023
- Table 98 Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023
- Table 99 Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023
- Table 100 Sales of Freezers by Format: % Volume 2018-2023
- Table 101 Sales of Freezers by Volume Capacity: % Volume 2018-2023
- Table 102 Sales of Fridge Freezers by Format: % Volume 2018-2023
- Table 103 Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023
- Table 104 Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023
- Table 105 Sales of Fridges by Volume Capacity: % Volume 2018-2023
- Table 106 NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023
- Table 107 LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023
- Table 108 NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023
- Table 109 NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
- Table 110 Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
- Table 111 Production of Refrigeration Appliances: Total Volume 2018-2023
- Table 112 Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
- Table 113 Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
- Table 114 Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
- Table 115 Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

## Air Treatment Products in Brazil

#### 2023 DEVELOPMENTS

Split air conditioners and air coolers support recovery trend

Technological evolution and greater production capacity are top goals among manufacturers

Climate-driven demand from the north to the south of Brazil

#### PROSPECTS AND OPPORTUNITIES

Players must adjust to new energy efficiency requirements over the forecast period

Design, home connectivity and thermal comfort as important product benefits

Innovation in air treatment products to enhance consumer wellbeing

# **CATEGORY DATA**

Table 116 - Sales of Air Treatment Products by Category: Volume 2018-2023

Table 117 - Sales of Air Treatment Products by Category: Value 2018-2023

Table 118 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023

Table 119 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023

Table 120 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023

Table 121 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023

Table 122 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023

Table 123 - Distribution of Air Treatment Products by Format: % Volume 2018-2023

Table 124 - Production of Air Conditioners: Total Volume 2018-2023

Table 125 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028

Table 126 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028

Table 127 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028

Table 128 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

# Food Preparation Appliances in Brazil

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Blenders and mixers strengthen value and volume results in 2023

Channel performances influenced by challenging economic and financial scenario for retailers in Brazil Affordability, quality standard and technological features boost competition among players in Brazil

# PROSPECTS AND OPPORTUNITIES

Generational shifts to impact consumer behaviour in the kitchen

Food preparation appliances deemed essential for Brazilians

Product design and technology as premium features for blenders and mixers

# **CATEGORY DATA**

Table 129 - Sales of Food Preparation Appliances by Category: Volume 2018-2023

Table 130 - Sales of Food Preparation Appliances by Category: Value 2018-2023

Table 131 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023

Table 132 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023

Table 133 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023

Table 134 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023

Table 135 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023

Table 136 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028

Table 137 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028

Table 138 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

Table 139 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

# Personal Care Appliances in Brazil

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Local consumers look for affordability across personal care appliances as prices rise Beauty elements increasingly emerge in hair care appliances

Consumer behaviour influences distribution channel dynamics

#### PROSPECTS AND OPPORTUNITIES

Embracing one's natural beauty is key beauty trait for Brazilians

Growing availability and brand awareness to strengthen demand for electric facial cleansers

New tax legislation could impact purchases from online Chinese retailers

# **CATEGORY DATA**

- Table 140 Sales of Personal Care Appliances by Category: Volume 2018-2023
- Table 141 Sales of Personal Care Appliances by Category: Value 2018-2023
- Table 142 Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
- Table 143 Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
- Table 144 Sales of Body Shavers by Format: % Volume 2018-2023
- Table 145 Sales of Hair Care Appliances by Format: % Volume 2018-2023
- Table 146 NBO Company Shares of Personal Care Appliances 2019-2023
- Table 147 LBN Brand Shares of Personal Care Appliances 2020-2023
- Table 148 Distribution of Personal Care Appliances by Format: % Volume 2018-2023
- Table 149 Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
- Table 150 Forecast Sales of Personal Care Appliances by Category: Value 2023-2028
- Table 151 Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028
- Table 152 Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

# Small Cooking Appliances in Brazil

# KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Practicality continues to drive demand for small cooking appliances across socioeconomic levels

Hypermarkets and e-commerce perform well in a challenging retail scenario

Increasing competition and brand diversification in Brazil

# PROSPECTS AND OPPORTUNITIES

Innovation, design and capacity should foster further growth of light fryers in Brazil

Rising demand for premium coffee experience amid inflation challenges

Financial legislation as possible influential factor behind consumers' purchasing decisions

## CATEGORY DATA

- Table 153 Sales of Small Cooking Appliances by Category: Volume 2018-2023
- Table 154 Sales of Small Cooking Appliances by Category: Value 2018-2023
- Table 155 Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023
- Table 156 Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023
- Table 157 Sales of Freestanding Hobs by Format: % Volume 2018-2023
- Table 158 NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023
- Table 159 LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023
- Table 160 Distribution of Small Cooking Appliances by Format: % Volume 2018-2023
- Table 161 Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028
- Table 162 Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028
- Table 163 Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028
- Table 164 Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

#### Vacuum Cleaners in Brazil

#### **KEY DATA FINDINGS**

### 2023 DEVELOPMENTS

Positive performance as consumers consider practicality, quality and technological devices

Economic fluctuations lead to increasing competitiveness by targeting mid-income consumers

E-commerce, appliances specialists and hypermarkets are positive performers

#### PROSPECTS AND OPPORTUNITIES

Resilience of stick vacuum cleaners will support long-term category growth

Convenience for busy Brazilians set to drive further demand for vacuum cleaners

Robotic vacuum cleaners to foster stronger growth in the following years

#### CATEGORY DATA

Table 165 - Sales of Vacuum Cleaners by Category: Volume 2018-2023

Table 166 - Sales of Vacuum Cleaners by Category: Value 2018-2023

Table 167 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023

Table 168 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

Table 169 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023

Table 170 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

Table 171 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

Table 172 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

Table 173 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028

Table 174 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

Table 175 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028

Table 176 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2023-2028

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-appliances-in-brazil/report.