

Consumer Appliances in Australia

November 2023

Table of Contents

Consumer Appliances in Australia

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume demand declines amidst elevated interest rates The emphasis on energy efficiency heightens in reaction to inflationary forces Popularity of built-in formats and large capacity appliances

PROSPECTS AND OPPORTUNITIES

Recovery of growth to pre-pandemic levels, with value growth outpacing volume Continuous focus on making household chores easier and more efficient Evolving trends in connectivity, energy efficiency, and smart home integration

CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023Table 34 - Sales of Dishwashers by Category: Value 2018-2023Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2019-2023Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023Table 40 - LBN Brand Shares of Dishwashers: % Volume 2020-2023Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023Table 42 - Production of Dishwashers: Total Volume 2018-2023Table 43 - Forecast Sales of Dishwashers by Category: Value 2023-2028Table 44 - Forecast Sales of Dishwashers by Category: % Volume Company 2023-2028Table 45 - Forecast Sales of Dishwashers by Category: % Volume Company 2023-2028Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

Home Laundry Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home laundry appliances sees a further slowdown in growth Energy-saving appliances become key amidst economic uncertainty Convenience and efficiency drive demand for washer dryers and eco-friendly features

PROSPECTS AND OPPORTUNITIES

Inventory pressure expected to ease, with growth recovering to pre-pandemic levels Embracing high-performance laundry solutions Rising demand for sustainable laundry solutions will drive consumer and manufacturer actions

CATEGORY DATA

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2018-2023Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2018-2023Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2018-2023Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023

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

Large Cooking Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales drop as unfavourable economic conditions persist Rise of induction cooking in modern kitchens Embracing multifunctionality and healthy cooking

PROSPECTS AND OPPORTUNITIES

Early signs of economic recovery bring an optimistic outlook Sustainability and multifunctionality poised for growth acceleration Automated kitchens set to see rising popularity

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 - NBO Company Shares of Range Cookers: % Volume 2019-2023 Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2018-2023 Table 79 - Production of Large Cooking Appliances: Total Volume 2018-2023 Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028 Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028 Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028 Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

Microwaves in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Microwaves grapples with inflationary pressure as interest in built-in format surges Multifunctionality and healthy features shine Rising popularity of a black finish for appliances in modern kitchens

PROSPECTS AND OPPORTUNITIES

Built-in format and modern designs poised to drive demand Downward pressure from versatile ovens expected to continue The growing prevalence of multifunctionality

CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2018-2023 Table 85 - Sales of Microwaves by Category: Value 2018-2023 Table 86 - Sales of Microwaves by Category: % Volume Growth 2018-2023 Table 87 - Sales of Microwaves by Category: % Value Growth 2018-2023 Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2019-2023 Table 89 - NBO Company Shares of Microwaves: % Volume 2019-2023 Table 90 - LBN Brand Shares of Microwaves: % Volume 2020-2023 Table 91 - Distribution of Microwaves by Format: % Volume 2018-2023 Table 92 - Production of Microwaves: Total Volume 2018-2023 Table 93 - Forecast Sales of Microwaves by Category: Volume 2023-2028 Table 94 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028 Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028 Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

Refrigeration Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weak demand contributes to declines in both volume and value sales Inflationary crisis exacerbates energy consciousness amongst Australians Consumers demand advanced preservation technology and contemporary design in refrigeration appliances

PROSPECTS AND OPPORTUNITIES

Innovation to drive up replacement despite continuing weak demand Fusing channels for success: The imperative of an omnichannel strategy The reduction of food waste set to enhance sustainability claims in refrigeration appliances

CATEGORY DATA

Table 97 - Sales of Refrigeration Appliances by Category: Volume 2018-2023 Table 98 - Sales of Refrigeration Appliances by Category: Value 2018-2023 Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023 Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023 Table 101 - Sales of Freezers by Format: % Volume 2018-2023 Table 102 - Sales of Freezers by Volume Capacity: % Volume 2018-2023 Table 103 - Sales of Fridge Freezers by Format: % Volume 2018-2023 Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023 Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023 Table 106 - Sales of Fridges by Volume Capacity: % Volume 2018-2023 Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023 Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023 Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023 Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023 Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2019-2023 Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023 Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023 Table 114 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028 Table 115 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028 Table 116 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028 Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of dehumidifiers struggle after a previous strong performance Pervasive integration of air purification technology across diverse categories Rising demand for compatibility and sustainability in air conditioners

PROSPECTS AND OPPORTUNITIES

El Niño weather pattern will spur demand for cooling appliances Air purifiers poised to continue to grow, with advanced technology targeting larger spaces Smart home will continue to drive connectivity

CATEGORY DATA

Table 118 - Sales of Air Treatment Products by Category: Volume 2018-2023
Table 119 - Sales of Air Treatment Products by Category: Value 2018-2023
Table 120 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
Table 121 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023
Table 122 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023
Table 123 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023
Table 124 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
Table 125 - Distribution of Air Treatment Products by Format: % Volume 2018-2023
Table 126 - Production of Air Conditioners: Total Volume 2018-2023
Table 127 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 128 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: % Volume 2023-2028
Table 130 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

Food Preparation Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Food preparation appliances experiences a significant decline Popularity of multifunctionality on the rise as consumers seek to reduce their appliances and energy bills Offline channels making a comeback, while e-commerce continues to expand

PROSPECTS AND OPPORTUNITIES

Category poised for further decline, with emphasis on value and lifestyle alignment Rise of specialised accessories set to promote multifunctionality Rising popularity of compact living, and emphasis on durability in marketing

CATEGORY DATA

- Table 131 Sales of Food Preparation Appliances by Category: Volume 2018-2023
- Table 132 Sales of Food Preparation Appliances by Category: Value 2018-2023
- Table 133 Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023
- Table 134 Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023
- Table 135 NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023
- Table 136 LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023
- Table 137 Distribution of Food Preparation Appliances by Format: % Volume 2018-2023
- Table 138 Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028
- Table 139 Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028
- Table 140 Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

Personal Care Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite declining volumes of personal care appliances, value sales see growth Hair care appliances sees a rebound, driven by premium hair styling products Despite a decline in overall volume sales, multi-utility body shavers are on the rise

PROSPECTS AND OPPORTUNITIES

Innovative technologies and premiumisation set to drive growth Hot air styling technology poised to amplify the growth of hair care appliances Technological advances primed to accelerate the expansion of electric facial cleansers and oral care appliances

CATEGORY DATA

Table 142 - Sales of Personal Care Appliances by Category: Volume 2018-2023
Table 143 - Sales of Personal Care Appliances by Category: Value 2018-2023
Table 144 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
Table 145 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
Table 146 - Sales of Body Shavers by Format: % Volume 2018-2023
Table 147 - Sales of Hair Care Appliances by Format: % Volume 2018-2023
Table 148 - NBO Company Shares of Personal Care Appliances 2019-2023
Table 149 - LBN Brand Shares of Personal Care Appliances 2020-2023
Table 150 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023
Table 151 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
Table 153 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028
Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

Small Cooking Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressure exacerbates challenges Wellness and multifunctionality fuel growth for rice cookers and light fryers Espresso coffee machines benefits from consumers seeking to recreate a café-like experience at home

PROSPECTS AND OPPORTUNITIES

Pre-pandemic growth poised to return Evolving trends of connectivity, convenience, and cold brew in coffee machines Persistent premiumisation in small cooking appliances

CATEGORY DATA

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

 Table 163 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

Table 165 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

Vacuum Cleaners in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic challenges temper demand, but stick and robotic vacuum cleaners maintain growth Robotic vacuum cleaners continues to flourish Dyson expands its presence by entering robotic vacuum cleaners

PROSPECTS AND OPPORTUNITIES

A resilient growth trajectory, driven by consumer preference, technology, and pricing strategies Rising demand for convenience will fuel demand for all-in-one vacuum cleaners Anticipation of product differentiation and dynamism in vacuum cleaners

CATEGORY DATA

Table 167 - Sales of Vacuum Cleaners by Category: Volume 2018-2023
Table 168 - Sales of Vacuum Cleaners by Category: Value 2018-2023
Table 169 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023
Table 170 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023
Table 171 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023
Table 172 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023
Table 173 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023
Table 174 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023
Table 175 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028
Table 176 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028
Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028
Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume 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-australia/report.