



Euromonitor
International

Consumer Appliances in Spain

December 2024

Table of Contents

EXECUTIVE SUMMARY

Consumer appliances in 2024: The big picture
2024 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 2019-2025
Table 2 - Replacement Cycles of Consumer Appliances by Category 2019-2025

MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2019-2024
Table 4 - Sales of Consumer Appliances by Category: Value 2019-2024
Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2019-2024
Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2019-2024
Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2019-2024
Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2019-2024
Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2019-2024
Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2019-2024
Table 11 - Sales of Small Appliances by Category: Volume 2019-2024
Table 12 - Sales of Small Appliances by Category: Value 2019-2024
Table 13 - Sales of Small Appliances by Category: % Volume Growth 2019-2024
Table 14 - Sales of Small Appliances by Category: % Value Growth 2019-2024
Table 15 - NBO Company Shares of Major Appliances: % Volume 2020-2024
Table 16 - LBN Brand Shares of Major Appliances: % Volume 2021-2024
Table 17 - NBO Company Shares of Small Appliances: % Volume 2020-2024
Table 18 - LBN Brand Shares of Small Appliances: % Volume 2021-2024
Table 19 - Distribution of Major Appliances by Format: % Volume 2019-2024
Table 20 - Distribution of Small Appliances by Format: % Volume 2019-2024
Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2024-2029
Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2024-2029
Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2024-2029
Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2024-2029
Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2024-2029
Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2024-2029
Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2024-2029
Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2024-2029
Table 29 - Forecast Sales of Small Appliances by Category: Volume 2024-2029
Table 30 - Forecast Sales of Small Appliances by Category: Value 2024-2029
Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2024-2029
Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of dishwashers continue to decline in 2024 but the category continues to show potential
New launches and innovations generating interest in the category
Competition heating up but rankings remain stable

PROSPECTS AND OPPORTUNITIES

Dishwashers set to return to growth from 2025
Energy efficiency and water saving modes will be a focus of innovation and demand
Distribution likely to be shaped by a growing focus on omnichannel strategies

CATEGORY DATA

- Table 33 - Sales of Dishwashers by Category: Volume 2019-2024
- Table 34 - Sales of Dishwashers by Category: Value 2019-2024
- Table 35 - Sales of Dishwashers by Category: % Volume Growth 2019-2024
- Table 36 - Sales of Dishwashers by Category: % Value Growth 2019-2024
- Table 37 - Sales of Dishwashers by Format: % Volume 2019-2024
- Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2020-2024
- Table 39 - NBO Company Shares of Dishwashers: % Volume 2020-2024
- Table 40 - LBN Brand Shares of Dishwashers: % Volume 2021-2024
- Table 41 - Distribution of Dishwashers by Format: % Volume 2019-2024
- Table 42 - Production of Dishwashers: Total Volume 2019-2024
- Table 43 - Forecast Sales of Dishwashers by Category: Volume 2024-2029
- Table 44 - Forecast Sales of Dishwashers by Category: Value 2024-2029
- Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2024-2029
- Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2024-2029

Home Laundry Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slow down in the real estate market negatively impacts demand for home laundry appliances
Competitive landscape remains stable
Innovation remains a key sales driver in 2024

PROSPECTS AND OPPORTUNITIES

Demand is expected to bounce back as the Spanish housing market shows the first signs of recovery
New players likely to enter the market and provide competition to the established leaders
Energy efficiency and durability expected to drive innovation in the category over the forecast period

CATEGORY DATA

- Table 47 - Sales of Home Laundry Appliances by Category: Volume 2019-2024
- Table 48 - Sales of Home Laundry Appliances by Category: Value 2019-2024
- Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2019-2024
- Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2019-2024
- Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2019-2024
- Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2019-2024
- Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2019-2024
- Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2020-2024
- Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2020-2024
- Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2021-2024
- Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2019-2024
- Table 58 - Production of Home Laundry Appliances: Total Volume 2019-2024

Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2024-2029
Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2024-2029
Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2024-2029
Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2024-2029

Large Cooking Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Built-in large cooking appliances remain the preferred option
Investment in innovation being funnelled into built-in large cooking appliances
Consolidation in the competitive landscape

PROSPECTS AND OPPORTUNITIES

Brighter outlook for large cooking appliances with an expected improvement in the housing market on the horizon
Ovens will continue incorporating more cooking features
Physical stores likely to remain dominant despite the growth of e-commerce

CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2019-2024
Table 64 - Sales of Large Cooking Appliances by Category: Value 2019-2024
Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2019-2024
Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2019-2024
Table 67 - Sales of Built-in Hobs by Format: % Volume 2019-2024
Table 68 - Sales of Ovens by Smart Appliances: % Volume 2020-2024
Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2020-2024
Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2021-2024
Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2020-2024
Table 72 - NBO Company Shares of Ovens: % Volume 2020-2024
Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2020-2024
Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2020-2024
Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2020-2024
Table 76 - NBO Company Shares of Cookers: % Volume 2020-2024
Table 77 - NBO Company Shares of Range Cookers: % Volume 2020-2024
Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2019-2024
Table 79 - Production of Large Cooking Appliances: Total Volume 2019-2024
Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2024-2029
Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2024-2029
Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2024-2029
Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2024-2029

Microwaves in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Microwaves bounce back thanks to their affordability and convenience
Combination microwaves continue to dominate the category as consumers demand multifunctional appliances
Competition remains fierce as new and existing players continue to invest in innovation and new product development

PROSPECTS AND OPPORTUNITIES

Change in consumer habits might affect volumes
Built-in microwaves expected to outperform freestanding models

E-commerce is expected to see stronger growth over the forecast period backed by the success of Amazon and other e-commerce marketplaces

CATEGORY DATA

- Table 84 - Sales of Microwaves by Category: Volume 2019-2024
- Table 85 - Sales of Microwaves by Category: Value 2019-2024
- Table 86 - Sales of Microwaves by Category: % Volume Growth 2019-2024
- Table 87 - Sales of Microwaves by Category: % Value Growth 2019-2024
- Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2020-2024
- Table 89 - NBO Company Shares of Microwaves: % Volume 2020-2024
- Table 90 - LBN Brand Shares of Microwaves: % Volume 2021-2024
- Table 91 - Distribution of Microwaves by Format: % Volume 2019-2024
- Table 92 - Production of Microwaves: Total Volume 2019-2024
- Table 93 - Forecast Sales of Microwaves by Category: Volume 2024-2029
- Table 94 - Forecast Sales of Microwaves by Category: Value 2024-2029
- Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2024-2029
- Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2024-2029

Refrigeration Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sales decline as the housing market stalls
- Electric wine coolers/chillers experiences a resurgence in demand
- Competitive landscape remains stable

PROSPECTS AND OPPORTUNITIES

- Demand expected to bounce back
- Innovation will be focused on capacity and energy efficiency
- Offline retailers expected to remain dominant

CATEGORY DATA

- Table 97 - Sales of Refrigeration Appliances by Category: Volume 2019-2024
- Table 98 - Sales of Refrigeration Appliances by Category: Value 2019-2024
- Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2019-2024
- Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2019-2024
- Table 101 - Sales of Freezers by Format: % Volume 2019-2024
- Table 102 - Sales of Freezers by Volume Capacity: % Volume 2019-2024
- Table 103 - Sales of Fridge Freezers by Format: % Volume 2019-2024
- Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2019-2024
- Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2020-2024
- Table 106 - Sales of Fridges by Volume Capacity: % Volume 2019-2024
- Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2020-2024
- Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2021-2024
- Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2020-2024
- Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2020-2024
- Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2020-2024
- Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2020-2024
- Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2019-2024
- Table 114 - Production of Refrigeration Appliances: Total Volume 2019-2024
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2024-2029
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2024-2029
- Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2024-2029
- Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2024-2029

Air Treatment Products in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Competition heats up as demand for air treatment products grows
Affordable price points drive demand for cooling fans
Demand for second-hand air treatment products is on the rise

PROSPECTS AND OPPORTUNITIES

Offline channels will continue to dominate sales but the internet still offers potential for sales and marketing
Rising temperatures expected to extend the seasonality for air treatment products
Energy efficiency will drive the future development of the category

CATEGORY DATA

Table 119 - Sales of Air Treatment Products by Category: Volume 2019-2024
Table 120 - Sales of Air Treatment Products by Category: Value 2019-2024
Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2019-2024
Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2019-2024
Table 123 - Sales of Air Conditioners by Smart Appliances: % Volume 2020-2024
Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2020-2024
Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2021-2024
Table 126 - Distribution of Air Treatment Products by Format: % Volume 2019-2024
Table 127 - Production of Air Conditioners: Total Volume 2019-2024
Table 128 - Forecast Sales of Air Treatment Products by Category: Volume 2024-2029
Table 129 - Forecast Sales of Air Treatment Products by Category: Value 2024-2029
Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2024-2029
Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2024-2029

Food Preparation Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another tough year for food preparation appliances as consumers remain budget conscious
Blenders the focus of innovation but food processors still seen to have potential
New players provide competition to the established category leaders

PROSPECTS AND OPPORTUNITIES

Cordless products in vogue while effective marketing strategies could help players reach a wider audience
Food preparation appliances to become more specialised
E-commerce set for a return to growth backed by key players such as Amazon

CATEGORY DATA

Table 132 - Sales of Food Preparation Appliances by Category: Volume 2019-2024
Table 133 - Sales of Food Preparation Appliances by Category: Value 2019-2024
Table 134 - Sales of Food Preparation Appliances by Category: % Volume Growth 2019-2024
Table 135 - Sales of Food Preparation Appliances by Category: % Value Growth 2019-2024
Table 136 - NBO Company Shares of Food Preparation Appliances: % Volume 2020-2024
Table 137 - LBN Brand Shares of Food Preparation Appliances: % Volume 2021-2024
Table 138 - Distribution of Food Preparation Appliances by Format: % Volume 2019-2024
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Volume 2024-2029
Table 140 - Forecast Sales of Food Preparation Appliances by Category: Value 2024-2029

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2024-2029

Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2024-2029

Personal Care Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Mixed performances seen across personal care appliances
- The desire for professional hair care results at home is driving premiumisation
- High-end brands continue gaining traction

PROSPECTS AND OPPORTUNITIES

- Hair care appliances will likely remain the focus of innovation
- Mixed outlook for personal care appliances
- Premium brands are expected to continue gaining share

CATEGORY DATA

- Table 143 - Sales of Personal Care Appliances by Category: Volume 2019-2024
- Table 144 - Sales of Personal Care Appliances by Category: Value 2019-2024
- Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2019-2024
- Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2019-2024
- Table 147 - Sales of Body Shavers by Format: % Volume 2019-2024
- Table 148 - Sales of Hair Care Appliances by Format: % Volume 2019-2024
- Table 149 - NBO Company Shares of Personal Care Appliances 2020-2024
- Table 150 - LBN Brand Shares of Personal Care Appliances 2021-2024
- Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2019-2024
- Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2024-2029
- Table 153 - Forecast Sales of Personal Care Appliances by Category: Value 2024-2029
- Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2024-2029
- Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2024-2029

Small Cooking Appliances in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Demand for air fryers stabilises but the category remains full of potential
- Coffee machines get more premium as demand surges
- Competitive landscape remains stable but new players bring renewed energy and fresh ideas to the market

PROSPECTS AND OPPORTUNITIES

- Demand for coffee machines will remain strong
- Online sales are expected to continue growing but offline retailers will remain dominant
- Healthy living and environmental concerns likely to inspire innovation

CATEGORY DATA

- Table 156 - Sales of Small Cooking Appliances by Category: Volume 2019-2024
- Table 157 - Sales of Small Cooking Appliances by Category: Value 2019-2024
- Table 158 - Sales of Small Cooking Appliances by Category: % Volume Growth 2019-2024
- Table 159 - Sales of Small Cooking Appliances by Category: % Value Growth 2019-2024
- Table 160 - Sales of Freestanding Hobs by Format: % Volume 2019-2024
- Table 161 - NBO Company Shares of Small Cooking Appliances: % Volume 2020-2024
- Table 162 - LBN Brand Shares of Small Cooking Appliances: % Volume 2021-2024

Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2019-2024

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Volume 2024-2029

Table 165 - Forecast Sales of Small Cooking Appliances by Category: Value 2024-2029

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2024-2029

Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2024-2029

Vacuum Cleaners in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Decline in demand is offset by premiumisation in the category

Stick vacuum cleaners on the rise thanks to investment in new product development and innovation

Cecotec extends its lead as competition intensifies in vacuum cleaners

PROSPECTS AND OPPORTUNITIES

Distribution landscape expected to continue evolving bringing more options to the consumer

Stick vacuum cleaners set to outperform the other categories

Innovation set to play a central role in the future growth and development of vacuum cleaners

CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2019-2024

Table 169 - Sales of Vacuum Cleaners by Category: Value 2019-2024

Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2019-2024

Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2019-2024

Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2020-2024

Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2020-2024

Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2021-2024

Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2019-2024

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2024-2029

Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2024-2029

Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2024-2029

Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2024-2029

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-spain/report.