



Passport

Consumer Appliances in India

Euromonitor International

February 2024

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CONSUMER APPLIANCES IN INDIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for consumer appliances?

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MARKET INDICATORS

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

% households	2018	2019	2020	2021	2022	2023
Dishwashers	Data removed from sample					
Automatic Dryers						
Automatic Washer Dryers						
Automatic Washing Machines						
Semi-Automatic Washing Machines						
Built-in Hobs						
Ovens						
Cooker Hoods						
Cookers						
Range Cookers						
Microwaves						
Electric Wine Coolers/ Chillers						
Freezers						
Fridge Freezers						
Fridges						
Portable Room Air Conditioners						

Split Air Conditioners
 Window Air Conditioners
 Cooling Fans
 Food Preparation
 Appliances
 Heating Appliances
 Irons
 Body Shavers
 Hair Care Appliances
 Coffee Machines
 Freestanding Hobs
 Cylinder Vacuum Cleaners
 Handheld Vacuum Cleaners
 Stick Vacuum Cleaners
 Upright Vacuum Cleaners
 Robotic Vacuum Cleaners

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2024

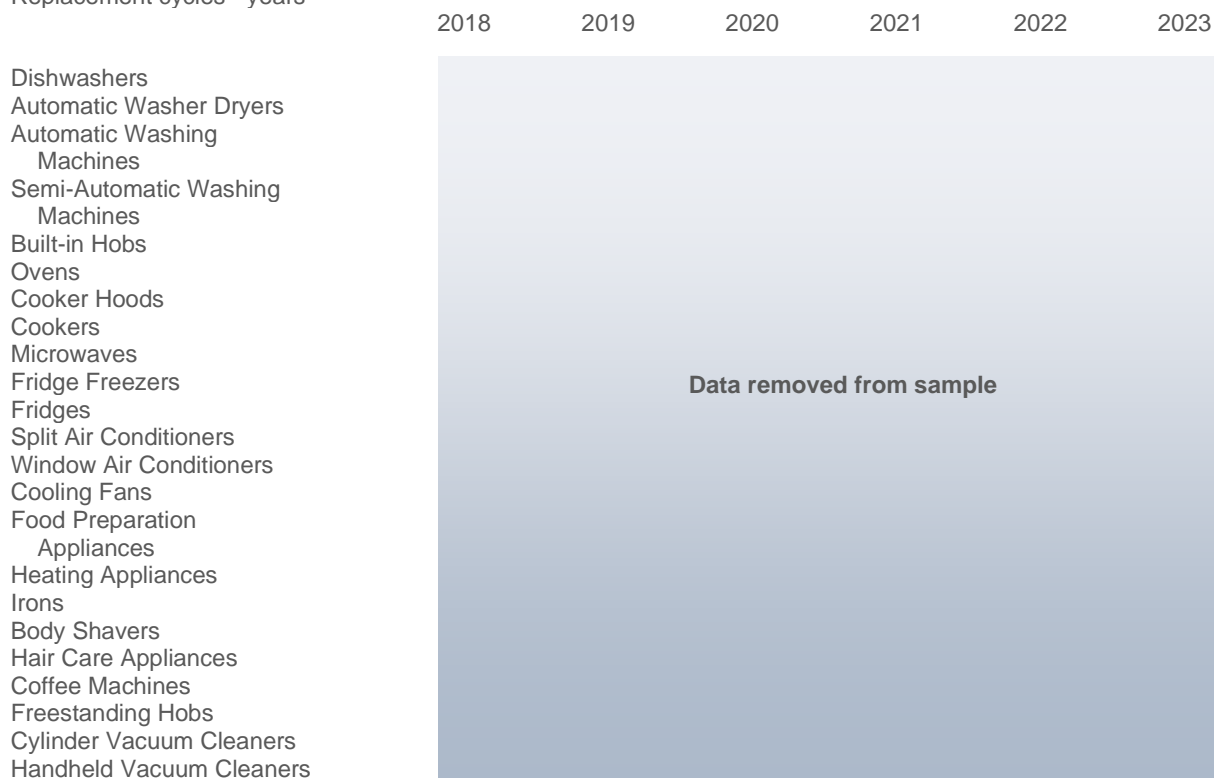
Dishwashers
 Automatic Dryers
 Automatic Washer Dryers
 Automatic Washing
 Machines
 Semi-Automatic Washing
 Machines
 Built-in Hobs
 Ovens
 Cooker Hoods
 Cookers
 Range Cookers
 Microwaves
 Electric Wine Coolers/
 Chillers
 Freezers
 Fridge Freezers
 Fridges
 Portable Room Air
 Conditioners
 Split Air Conditioners
 Window Air Conditioners
 Cooling Fans
 Food Preparation
 Appliances
 Heating Appliances
 Irons
 Body Shavers
 Hair Care Appliances
 Coffee Machines
 Freestanding Hobs
 Cylinder Vacuum Cleaners
 Handheld Vacuum Cleaners
 Stick Vacuum Cleaners
 Upright Vacuum Cleaners
 Robotic Vacuum Cleaners

Data removed from
sample

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 2 Replacement Cycles of Consumer Appliances by Category 2018-2024

Replacement cycles - years



2024



Source: Euromonitor International from official statistics, trade associations, trade interviews

MARKET DATA

Table 3 Sales of Consumer Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Consumer Appliances	Data removed from sample					
Major Appliances						
Small Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Consumer Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Consumer Appliances	Data removed from sample					
Major Appliances						
Small Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Consumer Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Consumer Appliances	Data removed from sample		
Major Appliances			
Small Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Consumer Appliances by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Consumer Appliances	Data removed from sample		
Major Appliances			
Small Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023

'000 units

	2018	2019	2020	2021	2022	2023
Major Appliances						
Built-In Major Appliances						
Freestanding Major Appliances						
Dishwashers						
- Built-in Dishwashers						
- Freestanding Dishwashers						
Home Laundry Appliances						
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						
- Automatic Washing Machines						
-- Built-in Automatic Washing Machines						
-- Freestanding Automatic Washing Machines						
- Semi-Automatic Washing Machines						
Large Cooking Appliances						
- Built-in Large Cooking Appliances						
- Freestanding Large Cooking Appliances						
- Built-in Hobs						
- Ovens						
- Cooker Hoods						
-- Built-in Cooker Hoods						
-- Freestanding Cooker Hoods						
- Cookers						
- Range Cookers						
Microwaves						
- Built-in Microwaves						
- Freestanding Microwaves						
Refrigeration Appliances						
- Built-in Refrigeration Appliances						
- Freestanding Refrigeration Appliances						
- Electric Wine Coolers/ Chillers						
-- Built-in Electric Wine Coolers/Chillers						
-- Freestanding Electric Wine Coolers/						

Data removed from sample

- Chillers
- Freezers
- Built-in Freezers
- Freestanding Freezers
- Fridge Freezers
- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Major Appliances	Data removed from sample					
Built-In Major Appliances						
Freestanding Major Appliances						
Dishwashers						
- Built-in Dishwashers						
- Freestanding Dishwashers						
Home Laundry Appliances						
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						
- Automatic Washing Machines						
-- Built-in Automatic Washing Machines						
-- Freestanding Automatic Washing Machines						
- Semi-Automatic Washing Machines						
Large Cooking Appliances						
- Built-in Large Cooking Appliances						
- Freestanding Large Cooking Appliances						
- Built-in Hobs						

- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers
- Microwaves
- Built-in Microwaves
- Freestanding Microwaves
- Refrigeration Appliances
- Built-in Refrigeration Appliances
- Freestanding Refrigeration Appliances
- Electric Wine Coolers/Chillers
- Built-in Electric Wine Coolers/Chillers
- Freestanding Electric Wine Coolers/Chillers
- Freezers
- Built-in Freezers
- Freestanding Freezers
- Fridge Freezers
- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

- Major Appliances
- Built-In Major Appliances
- Freestanding Major Appliances
- Dishwashers
- Built-in Dishwashers
- Freestanding Dishwashers
- Home Laundry Appliances
- Built-in Home Laundry Appliances
- Freestanding Home Laundry Appliances
- Automatic Dryers
- Built-in Automatic Dryers
- Freestanding Automatic Dryers
- Automatic Washer Dryers
- Built-in Automatic Washer Dryers
- Freestanding Automatic Washer Dryers
- Automatic Washing Machines
- Built-in Automatic Washing Machines

Data removed from sample

- Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines

Large Cooking Appliances

- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens

- Cooker Hoods

- Built-in Cooker Hoods

- Freestanding Cooker Hoods

- Cookers

- Range Cookers

Microwaves

- Built-in Microwaves

- Freestanding Microwaves

Refrigeration Appliances

- Built-in Refrigeration Appliances

- Freestanding Refrigeration Appliances

- Electric Wine Coolers/Chillers

- Built-in Electric Wine Coolers/Chillers

- Freestanding Electric Wine Coolers/Chillers

- Freezers

- Built-in Freezers

- Freestanding Freezers

- Fridge Freezers

- Built-in Fridge Freezers

- Freestanding Fridge Freezers

- Fridges

- Built-in Fridges

- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023

% current value growth

2022/23

2018-23 CAGR

2018/23 Total

Major Appliances

Built-In Major Appliances

Freestanding Major Appliances

Dishwashers

- Built-in Dishwashers

- Freestanding Dishwashers

Home Laundry Appliances

- Built-in Home Laundry Appliances

- Freestanding Home Laundry Appliances

- Automatic Dryers

- Built-in Automatic Dryers

- Freestanding Automatic Dryers

- Automatic Washer Dryers

- Built-in Automatic Washer Dryers

- Freestanding Automatic Washer Dryers

- Automatic Washing Machines

- Built-in Automatic Washing Machines

- Freestanding Automatic Washing Machines

- Semi-Automatic Washing Machines

Large Cooking Appliances

Data removed from sample

- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers
- Microwaves
- Built-in Microwaves
- Freestanding Microwaves
- Refrigeration Appliances
- Built-in Refrigeration Appliances
- Freestanding Refrigeration Appliances
- Electric Wine Coolers/Chillers
- Built-in Electric Wine Coolers/Chillers
- Freestanding Electric Wine Coolers/Chillers
- Freezers
- Built-in Freezers
- Freestanding Freezers
- Fridge Freezers
- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Sales of Small Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Small Appliances	Data removed from sample					
Air Treatment Products						
Food Preparation Appliances						
Heating Appliances						
Irons						
Personal Care Appliances						
Small Cooking Appliances						
Vacuum Cleaners						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Sales of Small Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Small Appliances	Data removed from sample					
Air Treatment Products						
Food Preparation Appliances						
Heating Appliances						

Irons
Personal Care Appliances
Small Cooking Appliances
Vacuum Cleaners

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Small Appliances by Category: % Volume Growth 2018-2023

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

Small Appliances
Air Treatment Products
Food Preparation Appliances
Heating Appliances
Irons
Personal Care Appliances
Small Cooking Appliances
Vacuum Cleaners

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Small Appliances by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Small Appliances
Air Treatment Products
Food Preparation Appliances
Heating Appliances
Irons
Personal Care Appliances
Small Cooking Appliances
Vacuum Cleaners

Data removed from sample

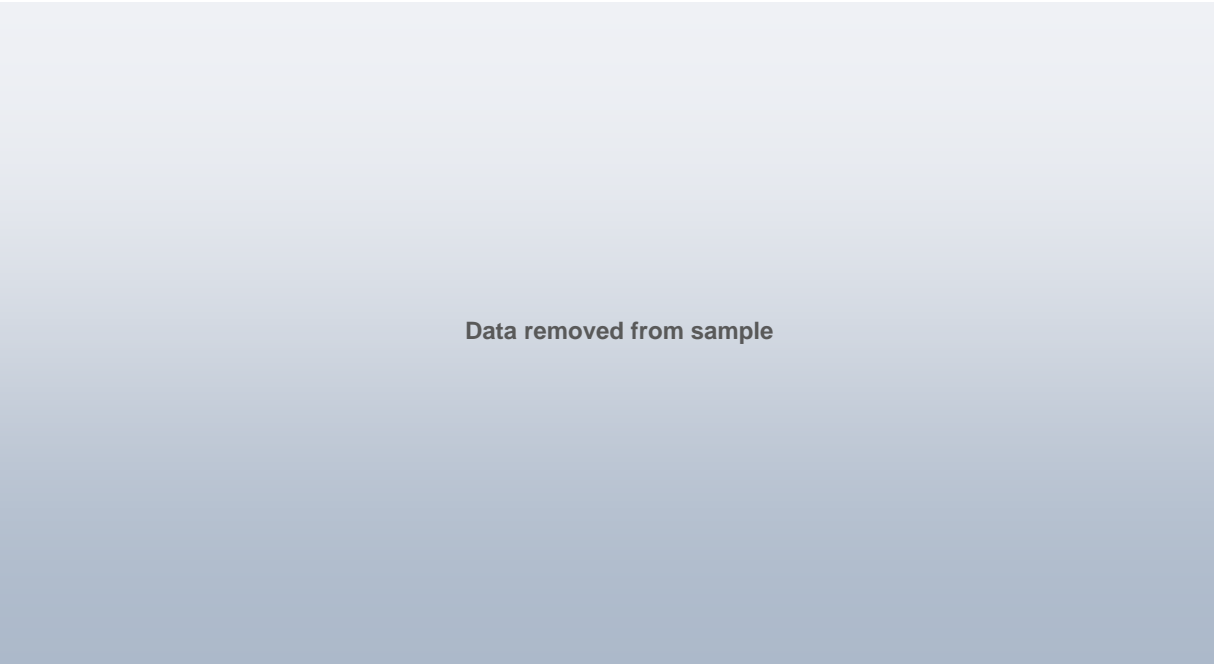
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 NBO Company Shares of Major Appliances: % Volume 2019-2023

% retail volume
Company

2019 2020 2021 2022 2023

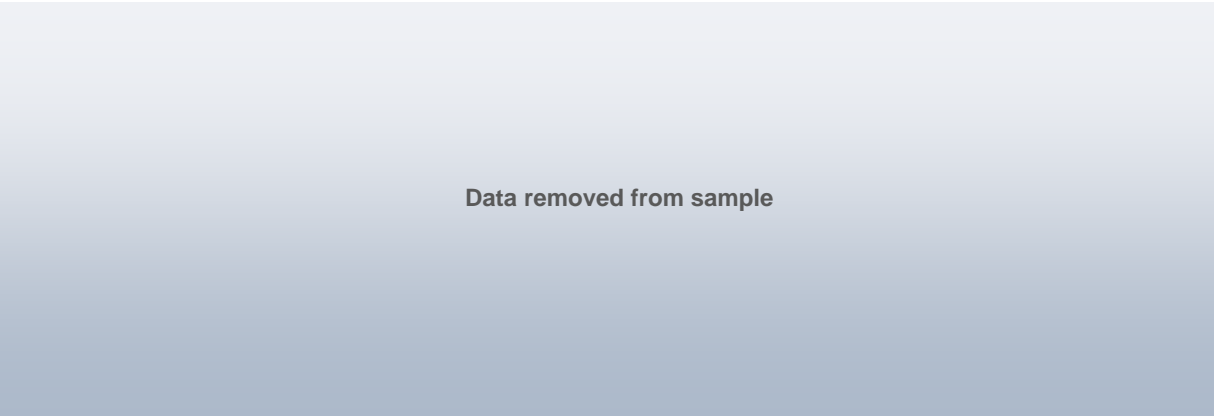
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

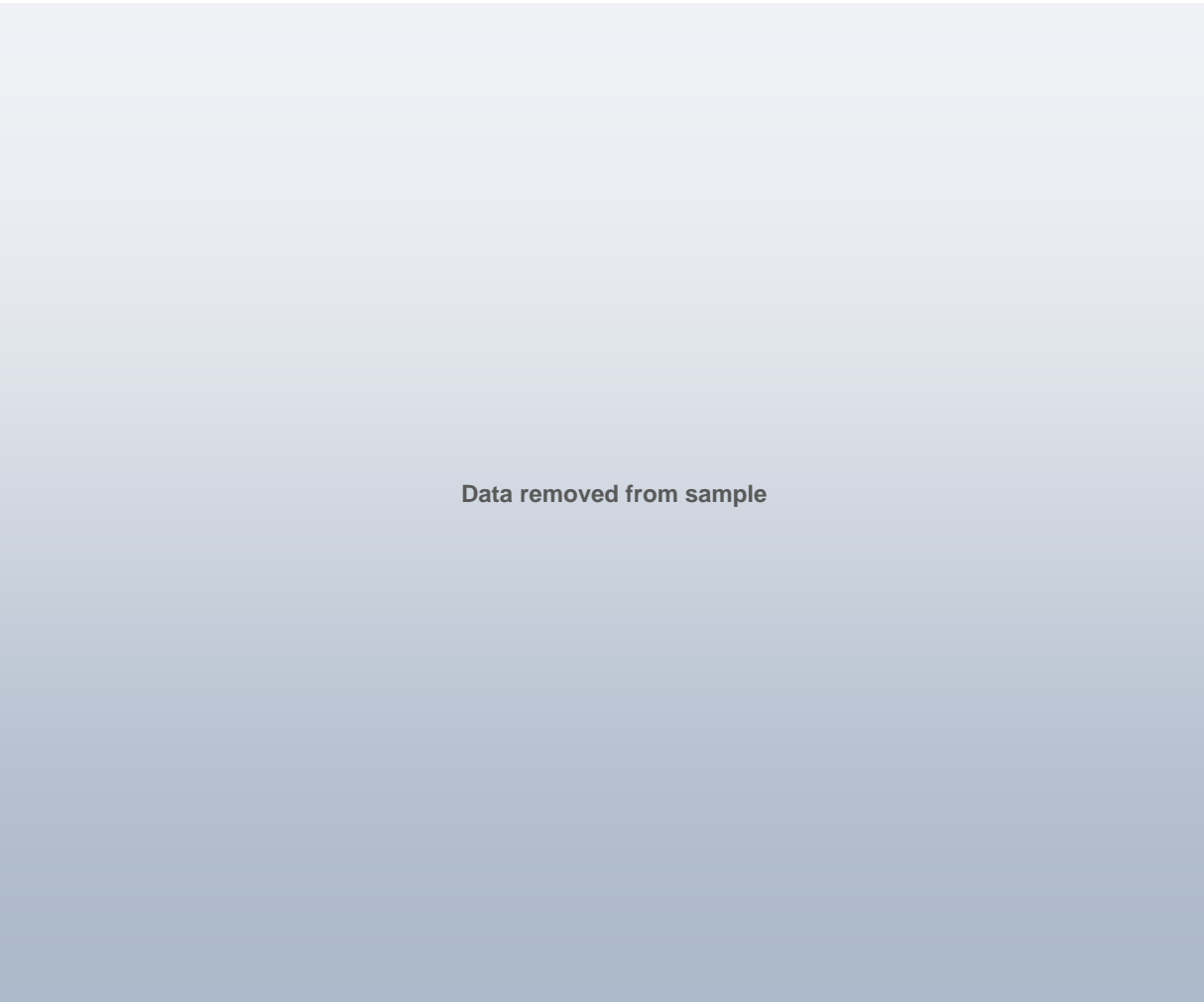
Table 16 LBN Brand Shares of Major Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Small Appliances: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Small Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Major Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 20 Distribution of Small Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						

--- Convenience Retail
 --- Supermarkets
 --- Hypermarkets
 --- Discounters
 --- Warehouse Clubs
 --- Food/drink/tobacco specialists
 --- Small Local Grocers
 -- Non-Grocery Retailers
 --- General Merchandise Stores
 ---- Department Stores
 ---- Variety Stores
 --- Apparel and Footwear Specialists
 --- Appliances and Electronics Specialists
 --- Home Products Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending
 -- Direct Selling
 - Retail E-Commerce
 Non-retail channels
 - Builder Merchants and Construction
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 21 Forecast Sales of Consumer Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Consumer Appliances	Data removed from sample					
Major Appliances						
Small Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Forecast Sales of Consumer Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Consumer Appliances	Data removed from sample					
Major Appliances						
Small Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Consumer Appliances	Data removed from sample		
Major Appliances			
Small Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Consumer Appliances	Data removed from sample		
Major Appliances			
Small Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Major Appliances	Data removed from sample					
Built-In Major Appliances						
Freestanding Major Appliances						
Dishwashers						
- Built-in Dishwashers						
- Freestanding Dishwashers						
Home Laundry Appliances						
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						

- Automatic Washing Machines
- Built-in Automatic Washing Machines
- Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines
- Large Cooking Appliances
- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers
- Microwaves
- Built-in Microwaves
- Freestanding Microwaves
- Refrigeration Appliances
- Built-in Refrigeration Appliances
- Freestanding Refrigeration Appliances
- Electric Wine Coolers/ Chillers
- Built-in Electric Wine Coolers/Chillers
- Freestanding Electric Wine Coolers/Chillers
- Freezers
- Built-in Freezers
- Freestanding Freezers
- Fridge Freezers
- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 26 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

INR million

2023 2024 2025 2026 2027 2028

Major Appliances
Built-In Major Appliances

Data removed from sample

Freestanding Major Appliances
 Dishwashers
 - Built-in Dishwashers
 - Freestanding Dishwashers
 Home Laundry Appliances
 - Built-in Home Laundry Appliances
 - Freestanding Home Laundry Appliances
 - Automatic Dryers
 -- Built-in Automatic Dryers
 -- Freestanding Automatic Dryers
 - Automatic Washer Dryers
 -- Built-in Automatic Washer Dryers
 -- Freestanding Automatic Washer Dryers
 - Automatic Washing Machines
 -- Built-in Automatic Washing Machines
 -- Freestanding Automatic Washing Machines
 - Semi-Automatic Washing Machines
 Large Cooking Appliances
 - Built-in Large Cooking Appliances
 - Freestanding Large Cooking Appliances
 - Built-in Hobs
 - Ovens
 - Cooker Hoods
 -- Built-in Cooker Hoods
 -- Freestanding Cooker Hoods
 - Cookers
 - Range Cookers
 Microwaves
 - Built-in Microwaves
 - Freestanding Microwaves
 Refrigeration Appliances
 - Built-in Refrigeration Appliances
 - Freestanding Refrigeration Appliances
 - Electric Wine Coolers/ Chillers
 -- Built-in Electric Wine Coolers/Chillers
 -- Freestanding Electric Wine Coolers/Chillers
 - Freezers
 -- Built-in Freezers
 -- Freestanding Freezers

Data removed from sample

- Fridge Freezers
- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 27 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split:
% Volume Growth 2023-2028**

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Major Appliances	Data removed from sample		
Built-In Major Appliances			
Freestanding Major Appliances			
Dishwashers			
- Built-in Dishwashers			
- Freestanding Dishwashers			
Home Laundry Appliances			
- Built-in Home Laundry Appliances			
- Freestanding Home Laundry Appliances			
- Automatic Dryers			
-- Built-in Automatic Dryers			
-- Freestanding Automatic Dryers			
- Automatic Washer Dryers			
-- Built-in Automatic Washer Dryers			
-- Freestanding Automatic Washer Dryers			
- Automatic Washing Machines			
-- Built-in Automatic Washing Machines			
-- Freestanding Automatic Washing Machines			
- Semi-Automatic Washing Machines			
Large Cooking Appliances			
- Built-in Large Cooking Appliances			
- Freestanding Large Cooking Appliances			
- Built-in Hobs			
- Ovens			
- Cooker Hoods			
-- Built-in Cooker Hoods			
-- Freestanding Cooker Hoods			
- Cookers			
- Range Cookers			
Microwaves			
- Built-in Microwaves			
- Freestanding Microwaves			
Refrigeration Appliances			
- Built-in Refrigeration Appliances			
- Freestanding Refrigeration Appliances			
- Electric Wine Coolers/Chillers			
-- Built-in Electric Wine Coolers/Chillers			
-- Freestanding Electric Wine Coolers/Chillers			
- Freezers			
-- Built-in Freezers			
-- Freestanding Freezers			
- Fridge Freezers			

- Built-in Fridge Freezers
- Freestanding Fridge Freezers
- Fridges
- Built-in Fridges
- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 28 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split:
% Value Growth 2023-2028**

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Major Appliances
- Built-In Major Appliances
- Freestanding Major Appliances
- Dishwashers
 - Built-in Dishwashers
 - Freestanding Dishwashers
- Home Laundry Appliances
 - Built-in Home Laundry Appliances
 - Freestanding Home Laundry Appliances
- Automatic Dryers
 - Built-in Automatic Dryers
 - Freestanding Automatic Dryers
- Automatic Washer Dryers
 - Built-in Automatic Washer Dryers
 - Freestanding Automatic Washer Dryers
- Automatic Washing Machines
 - Built-in Automatic Washing Machines
 - Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines
- Large Cooking Appliances
 - Built-in Large Cooking Appliances
 - Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
 - Built-in Cooker Hoods
 - Freestanding Cooker Hoods
- Cookers
 - Range Cookers
- Microwaves
 - Built-in Microwaves
 - Freestanding Microwaves
- Refrigeration Appliances
 - Built-in Refrigeration Appliances
 - Freestanding Refrigeration Appliances
- Electric Wine Coolers/Chillers
 - Built-in Electric Wine Coolers/Chillers
 - Freestanding Electric Wine Coolers/Chillers
- Freezers
 - Built-in Freezers
 - Freestanding Freezers
- Fridge Freezers
 - Built-in Fridge Freezers
 - Freestanding Fridge Freezers
- Fridges

Data removed from sample

-- Built-in Fridges
-- Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Sales of Small Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Small Appliances	Data removed from sample					
Air Treatment Products						
Food Preparation Appliances						
Heating Appliances						
Irons						
Personal Care Appliances						
Small Cooking Appliances						
Vacuum Cleaners						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Sales of Small Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Small Appliances	Data removed from sample					
Air Treatment Products						
Food Preparation Appliances						
Heating Appliances						
Irons						
Personal Care Appliances						
Small Cooking Appliances						
Vacuum Cleaners						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Small Appliances	Data removed from sample		
Air Treatment Products			
Food Preparation Appliances			
Heating Appliances			
Irons			
Personal Care Appliances			
Small Cooking Appliances			
Vacuum Cleaners			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Small Appliances	Data removed from sample		
Air Treatment Products			
Food Preparation Appliances			
Heating Appliances			
Irons			
Personal Care Appliances			
Small Cooking Appliances			
Vacuum Cleaners			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

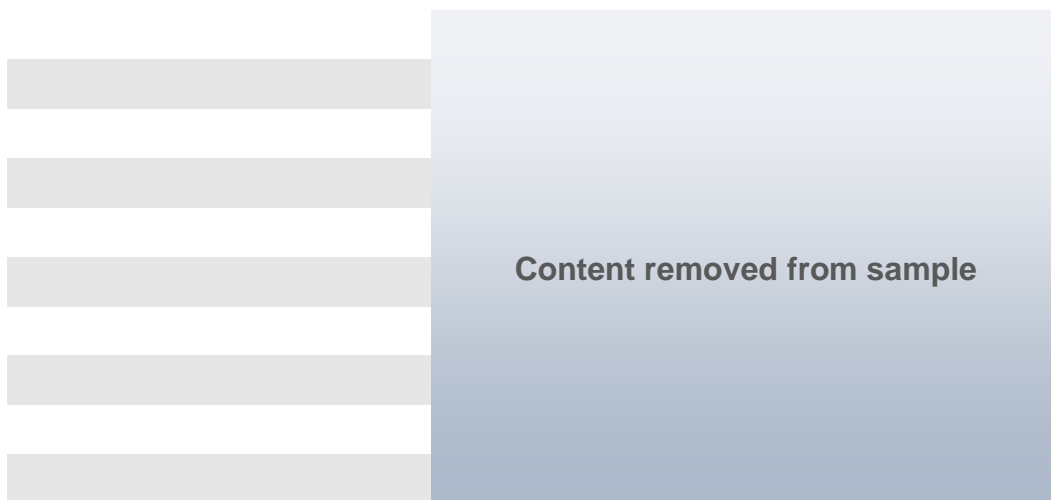
Forecast and scenario closing date: 30 October 2023
Report closing date: 12 February 2024
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during research include the following:

Summary 1 Research Sources

Official Sources	Content removed from sample
Trade Associations	
Trade Press	



Source: Euromonitor International

DISHWASHERS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Normalising of demand post-pandemic, hindered by inflationary concerns and the return of domestic help

Content removed from sample

Bosch retains slim lead of dishwashers in 2023

Content removed from sample

Content removed from sample

Offline stores continue to dominate distribution

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Category growth to remain muted over the forecast period

Content removed from sample

Localisation the way forward to ensure greater penetration of dishwashers

Content removed from sample

CATEGORY DATA

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

'000 units	2018	2019	2020	2021	2022	2023
Dishwashers	Data removed from sample					
- Built-in Dishwashers						
- Freestanding Dishwashers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

INR million	2018	2019	2020	2021	2022	2023
Dishwashers	Data removed from sample					
- Built-in Dishwashers						
- Freestanding Dishwashers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Dishwashers	Data removed from sample		
- Built-in Dishwashers			
- Freestanding Dishwashers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Dishwashers	Data removed from sample		
- Built-in Dishwashers			
- Freestanding Dishwashers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume	2018	2019	2020	2021	2022	2023
Table-Top	<div></div> <div>Data removed from sample</div>					
Full Size						
Slimline						
Compact						
Dishdrawer						
Total						
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

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

% retail volume	2019	2020	2021	2022	2023
Smart	Data removed from sample				
Non-Smart					
Total					
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources				

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

% retail volume	2019	2020	2021	2022	2023
Company	Data removed from sample				
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 42 Forecast Sales of Dishwashers by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Dishwashers	Data removed from sample					
- Built-in Dishwashers						
- Freestanding Dishwashers						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

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

INR million	2023	2024	2025	2026	2027	2028
Dishwashers	Data removed from sample					
- Built-in Dishwashers						
- Freestanding Dishwashers						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

Table 44 Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Dishwashers	Data removed from sample		
- Built-in Dishwashers			
- Freestanding Dishwashers			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

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

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Dishwashers	Data removed from sample		
- Built-in Dishwashers			
- Freestanding Dishwashers			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

HOME LAUNDRY APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Growth of home laundry appliances continues on positive trajectory

Content removed from sample

Sale of premium models supports value growth in 2023

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Rising number of brands manufacturing locally under the “make in india” initiative

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Content removed from sample

PROSPECTS AND OPPORTUNITIES

Stronger growth expected over the forecast period, driven by rising penetration rates

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Growing integration of iot and ai in home laundry appliances

Content removed from sample

Automatic and front-loading models to gain further popularity over forecast period

Content removed from sample

CATEGORY DATA

Table 46 Sales of Home Laundry Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Home Laundry Appliances	Data removed from sample					
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						
- Automatic Washing Machines						
-- Built-in Automatic Washing Machines						
-- Freestanding Automatic Washing Machines						
- Semi-Automatic Washing Machines						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

INR million

	2018	2019	2020	2021	2022	2023
Home Laundry Appliances	Data removed from sample					
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						
- Automatic Washing Machines						
-- Built-in Automatic Washing Machines						
-- Freestanding Automatic Washing Machines						
- Semi-Automatic Washing Machines						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Home Laundry Appliances	Data removed from sample		
- Built-in Home Laundry Appliances			
- Freestanding Home Laundry Appliances			
- Automatic Dryers			
-- Built-in Automatic Dryers			
-- Freestanding Automatic Dryers			
- Automatic Washer Dryers			
-- Built-in Automatic Washer Dryers			
-- Freestanding Automatic Washer Dryers			
- Automatic Washing Machines			
-- Built-in Automatic Washing Machines			
-- Freestanding Automatic Washing Machines			
- Semi-Automatic Washing Machines			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Home Laundry Appliances	Data removed from sample		
- Built-in Home Laundry Appliances			

- Freestanding Home Laundry Appliances
- Automatic Dryers
 - Built-in Automatic Dryers
 - Freestanding Automatic Dryers
- Automatic Washer Dryers
 - Built-in Automatic Washer Dryers
 - Freestanding Automatic Washer Dryers
- Automatic Washing Machines
 - Built-in Automatic Washing Machines
 - Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 50 Sales of Automatic Washer Dryers by Connected Appliances: % Volume 2018-2023

% retail volume	2019	2020	2021	2022	2023
Smart	Data removed from sample				
Non-Smart					
Total					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Sales of Automatic Washing Machines by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Front-Loading	Data removed from sample					
Top-Loading						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume	2018	2019	2020	2021	2022	2023
Small (<=6 kg)	Data removed from sample					
Medium (6.0-8.9 kg)						
Large (>=9 kg)						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Sales of Automatic Washing Machines by Connected Appliances: % Volume 2019-2023

% retail volume	2019	2020	2021	2022	2023
Smart	Data removed from sample				
Non-Smart					
Total					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 Distribution of Home Laundry Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 57 Production of Home Laundry Appliances: Total Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
------------	------	------	------	------	------	------

Home Laundry Appliances – Production

Data removed from sample

Source: Euromonitor International from trade sources/national statistics

Note: '-' indicates data not available

Table 58 Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Home Laundry Appliances	Data removed from sample					
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						
- Automatic Washing Machines						
-- Built-in Automatic Washing Machines						
-- Freestanding Automatic Washing Machines						
- Semi-Automatic Washing Machines						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 59 Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Home Laundry Appliances	Data removed from sample					
- Built-in Home Laundry Appliances						
- Freestanding Home Laundry Appliances						
- Automatic Dryers						
-- Built-in Automatic Dryers						
-- Freestanding Automatic Dryers						
- Automatic Washer Dryers						
-- Built-in Automatic Washer Dryers						
-- Freestanding Automatic Washer Dryers						

- Automatic Washing Machines
- Built-in Automatic Washing Machines
- Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

- Home Laundry Appliances
- Built-in Home Laundry Appliances
- Freestanding Home Laundry Appliances
- Automatic Dryers
- Built-in Automatic Dryers
- Freestanding Automatic Dryers
- Automatic Washer Dryers
- Built-in Automatic Washer Dryers
- Freestanding Automatic Washer Dryers
- Automatic Washing Machines
- Built-in Automatic Washing Machines
- Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Home Laundry Appliances
- Built-in Home Laundry Appliances
- Freestanding Home Laundry Appliances
- Automatic Dryers
- Built-in Automatic Dryers
- Freestanding Automatic Dryers
- Automatic Washer Dryers
- Built-in Automatic Washer Dryers
- Freestanding Automatic Washer Dryers
- Automatic Washing Machines
- Built-in Automatic Washing Machines
- Freestanding Automatic Washing Machines
- Semi-Automatic Washing Machines

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

LARGE COOKING APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Category experiences robust growth in 2023, albeit from a low base

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Appliances and electronics specialists remains dominant distribution channel

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Faber continues to lead large cooking appliances in 2023

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PROSPECTS AND OPPORTUNITIES

Future positive growth to be driven by rising urbanisation

Content removed from sample

Demand for premium large cooking appliances set to grow over forecast period

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CATEGORY DATA

Table 62 Sales of Large Cooking Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Large Cooking Appliances	Data removed from sample					
- Built-in Large Cooking Appliances						
- Freestanding Large Cooking Appliances						
- Built-in Hobs						
- Ovens						
- Cooker Hoods						
-- Built-in Cooker Hoods						
-- Freestanding Cooker Hoods						
- Cookers						
- Range Cookers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 63 Sales of Large Cooking Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Large Cooking Appliances	Data removed from sample					
- Built-in Large Cooking Appliances						
- Freestanding Large Cooking Appliances						
- Built-in Hobs						
- Ovens						
- Cooker Hoods						
-- Built-in Cooker Hoods						
-- Freestanding Cooker Hoods						
- Cookers						
- Range Cookers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 64 Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Large Cooking Appliances	Data removed from sample		
- Built-in Large Cooking Appliances			
- Freestanding Large Cooking Appliances			
- Built-in Hobs			
- Ovens			
- Cooker Hoods			
-- Built-in Cooker Hoods			

- Freestanding Cooker Hoods
- Cookers
- Range Cookers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 65 Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

- Large Cooking Appliances
- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 Sales of Built-in Hobs by Format: % Volume 2018-2023

% retail volume

2018 2019 2020 2021 2022 2023

- Gas
- Standard Electric
- Mixed
- Vitroc ceramic
- Induction
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Sales of Ovens by Connected Appliances: % Volume 2019-2023

% retail volume

2019 2020 2021 2022 2023

- Smart
- Non-Smart
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023

% retail volume
Company

2019 2020 2021 2022 2023

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 NBO Company Shares of Built-in Hobs: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 NBO Company Shares of Ovens: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 NBO Company Shares of Cooker Hoods: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 74 NBO Company Shares of Cookers: % Volume 2019-2023

% retail volume
Company

2019

2020

2021

2022

2023

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 75 Distribution of Large Cooking Appliances by Format: % Volume 2018-2023

% retail volume

2018

2019

2020

2021

2022

2023

Retail Channels
 - Retail Offline
 -- Grocery Retailers
 --- Convenience Retail
 --- Supermarkets
 --- Hypermarkets
 --- Discounters
 --- Warehouse Clubs
 --- Food/drink/tobacco specialists
 --- Small Local Grocers
 -- Non-Grocery Retailers
 --- General Merchandise Stores
 ---- Department Stores
 ---- Variety Stores
 --- Apparel and Footwear Specialists
 --- Appliances and Electronics Specialists
 --- Home Products Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending
 -- Direct Selling
 - Retail E-Commerce

Data removed from sample

Non-retail channels
- Builder Merchants and
Construction
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 76 Production of Large Cooking Appliances: Total Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Large Cooking Appliances – Production	Data removed from sample					

Source: Euromonitor International from trade sources/national statistics

Note: '-' indicates data not available

Table 77 Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods -- Built-in Cooker Hoods -- Freestanding Cooker Hoods - Cookers - Range Cookers	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 78 Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods -- Built-in Cooker Hoods -- Freestanding Cooker Hoods	Data removed from sample					

- Cookers
- Range Cookers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 79 Forecast Sales of Large Cooking Appliances by Category: % Volume Growth
2023-2028

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

- Large Cooking Appliances
- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 80 Forecast Sales of Large Cooking Appliances by Category: % Value Growth
2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Large Cooking Appliances
- Built-in Large Cooking Appliances
- Freestanding Large Cooking Appliances
- Built-in Hobs
- Ovens
- Cooker Hoods
- Built-in Cooker Hoods
- Freestanding Cooker Hoods
- Cookers
- Range Cookers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

MICROWAVES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

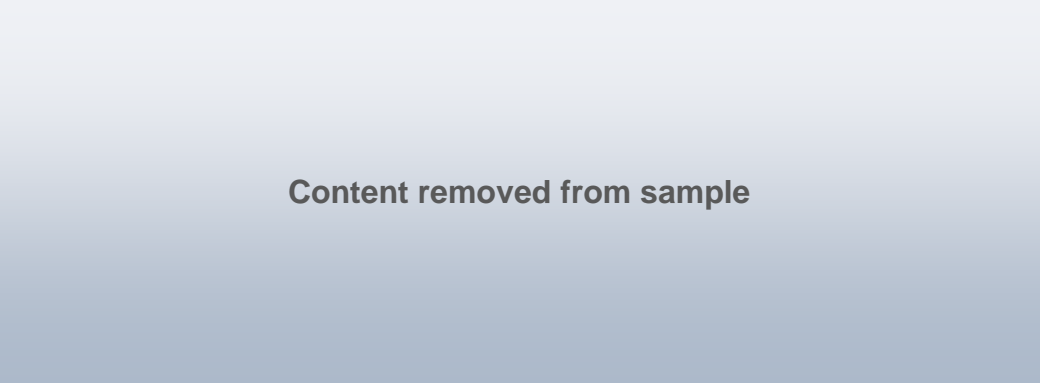
Demand for microwaves remains muted due to inflationary pressures

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Lg electronics retains lead of consolidated competitive landscape

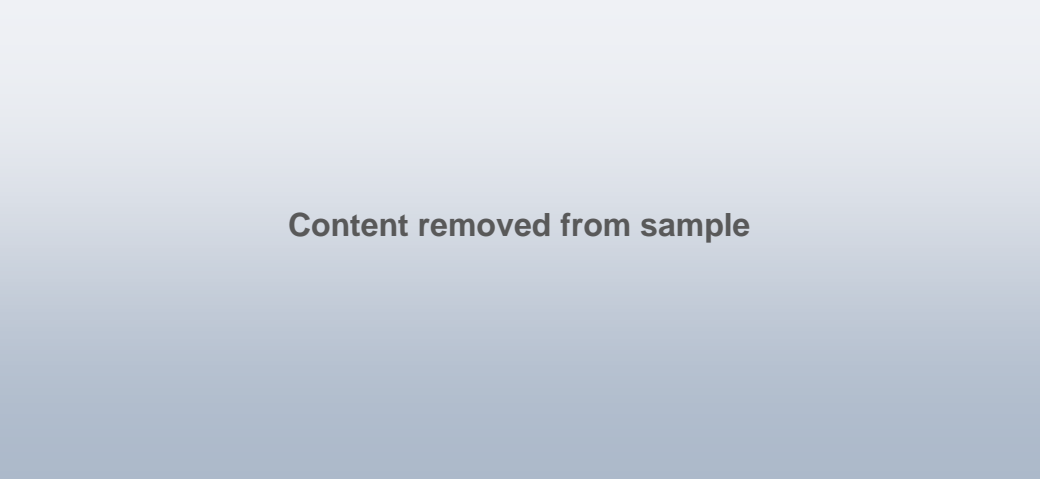
Content removed from sample

New launches by lg and samsung focus on connected technology

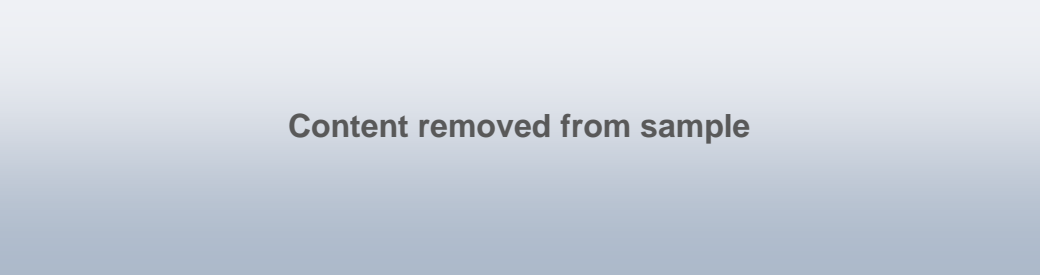


PROSPECTS AND OPPORTUNITIES

Microwaves expected to experience flat volume growth



Purchase of microwaves through e-commerce set to rise in coming years



CATEGORY DATA

Table 81 Sales of Microwaves by Category: Volume 2018-2023

'000 units

	2018	2019	2020	2021	2022	2023
Microwaves	Data removed from sample					
- Built-in Microwaves						
- Freestanding Microwaves						
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

Table 82 Sales of Microwaves by Category: Value 2018-2023

INR million						
	2018	2019	2020	2021	2022	2023
Microwaves	Data removed from sample					
- Built-in Microwaves						
- Freestanding Microwaves						
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

Table 83 Sales of Microwaves by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Microwaves	Data removed from sample		
- Built-in Microwaves			
- Freestanding Microwaves			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		

Table 84 Sales of Microwaves by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Microwaves	Data removed from sample		
- Built-in Microwaves			
- Freestanding Microwaves			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		

Table 85 Sales of Microwaves by Connected Appliances: % Volume 2019-2023

% retail volume	2019	2020	2021	2022	2023
Smart	Data removed from sample				
Non-Smart					
Total					
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources				

Table 86 NBO Company Shares of Microwaves: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 87 LBN Brand Shares of Microwaves: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 88 Distribution of Microwaves by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
-----------------	------	------	------	------	------	------

Retail Channels
 - Retail Offline
 -- Grocery Retailers
 --- Convenience Retail
 --- Supermarkets
 --- Hypermarkets
 --- Discounters
 --- Warehouse Clubs
 --- Food/drink/tobacco specialists
 --- Small Local Grocers
 -- Non-Grocery Retailers
 --- General Merchandise Stores
 ---- Department Stores
 ---- Variety Stores
 --- Apparel and Footwear Specialists
 --- Appliances and Electronics Specialists
 --- Home Products Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending
 -- Direct Selling
 - Retail E-Commerce
 Non-retail channels
 - Builder Merchants and Construction
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 89 Production of Microwaves: Total Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Microwaves – Production	Data removed from sample					

Source: Euromonitor International from trade sources/national statistics

Note: '-' indicates data not available

Table 90 Forecast Sales of Microwaves by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Microwaves - Built-in Microwaves - Freestanding Microwaves	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 91 Forecast Sales of Microwaves by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Microwaves	Data removed from sample					
- Built-in Microwaves						
- Freestanding Microwaves						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 92 Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Microwaves	Data removed from sample		
- Built-in Microwaves			
- Freestanding Microwaves			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 93 Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Microwaves	Data removed from sample		
- Built-in Microwaves			
- Freestanding Microwaves			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

REFRIGERATION APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Inflationary pressures impact growth of the category

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Rising preference for premium, larger capacity refrigeration appliances

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Content removed from sample

Growing number of brands adopt “make in india” initiative for fridge freezers

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PROSPECTS AND OPPORTUNITIES

Category expected to record solid growth over the forecast period

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Changes in energy efficiency norms to influence price of refrigeration appliances

Content removed from sample

Content removed from sample

Shift to e-commerce expected to increase in the coming years

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CATEGORY DATA

Table 94 Sales of Refrigeration Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Refrigeration Appliances	Data removed from sample					
- Built-in Refrigeration Appliances						
- Freestanding Refrigeration Appliances						
- Electric Wine Coolers/ Chillers						
-- Built-in Electric Wine Coolers/Chillers						
-- Freestanding Electric Wine Coolers/Chillers						
- Freezers						
-- Built-in Freezers						
-- Freestanding Freezers						
- Fridge Freezers						
-- Built-in Fridge Freezers						
-- Freestanding Fridge Freezers						
- Fridges						
-- Built-in Fridges						
-- Freestanding Fridges						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 95 Sales of Refrigeration Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Refrigeration Appliances	Data removed from sample					
- Built-in Refrigeration Appliances						
- Freestanding Refrigeration Appliances						
- Electric Wine Coolers/ Chillers						
-- Built-in Electric Wine Coolers/Chillers						
-- Freestanding Electric Wine Coolers/Chillers						
- Freezers						
-- Built-in Freezers						
-- Freestanding Freezers						
- Fridge Freezers						
-- Built-in Fridge Freezers						
-- Freestanding Fridge Freezers						
- Fridges						
-- Built-in Fridges						
-- Freestanding Fridges						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 96 Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Refrigeration Appliances	Data removed from sample		
- Built-in Refrigeration Appliances			
- Freestanding Refrigeration Appliances			
- Electric Wine Coolers/Chillers			
-- Built-in Electric Wine Coolers/Chillers			
-- Freestanding Electric Wine Coolers/Chillers			
- Freezers			
-- Built-in Freezers			
-- Freestanding Freezers			
- Fridge Freezers			
-- Built-in Fridge Freezers			
-- Freestanding Fridge Freezers			
- Fridges			
-- Built-in Fridges			
-- Freestanding Fridges			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 97 Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Refrigeration Appliances	Data removed from sample		
- Built-in Refrigeration Appliances			
- Freestanding Refrigeration Appliances			
- Electric Wine Coolers/Chillers			
-- Built-in Electric Wine Coolers/Chillers			
-- Freestanding Electric Wine Coolers/Chillers			
- Freezers			
-- Built-in Freezers			
-- Freestanding Freezers			
- Fridge Freezers			
-- Built-in Fridge Freezers			
-- Freestanding Fridge Freezers			
- Fridges			
-- Built-in Fridges			
-- Freestanding Fridges			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 Sales of Fridge Freezers by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Single Door	Data removed from sample					
Double Door (Bottom Freezer)						
Double Door (Top Freezer)						
Side-by-Side						
Side-by-Side w/ Dispenser						
Side-by-Side w/out Dispenser						
3-Door						
3-Door w/ Dispenser						
3-Door w/out Dispenser						
4-Door+ Combinations						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 99 Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
<142 litre (<5 cu ft)	Data removed from sample					
142-340 litre (5-12 cu ft)						
341-510 litre (12.1-18 cu ft)						
511-595 litre (18.1-21 cu ft)						
Total						

cu ft)
>595 litre (>21 cu ft)
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 100 Sales of Fridge Freezers by Connected Appliances: % Volume 2019-2023

% retail volume

2019 2020 2021 2022 2023

Smart
Non-Smart
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 101 Sales of Fridges by Volume Capacity: % Volume 2018-2023

% retail volume

2018 2019 2020 2021 2022 2023

<142 litre (<5 cu ft)
142-340 litre (5-12 cu ft)
341-510 litre (12.1-18 cu ft)
511-595 litre (18.1-21 cu ft)
>595 litre (>21 cu ft)
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 102 NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023

% retail volume
Company

2019 2020 2021 2022 2023

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 103 LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 104 NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 105 NBO Company Shares of Freestanding Fridges: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 Distribution of Refrigeration Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
-----------------	------	------	------	------	------	------

Retail Channels
 - Retail Offline
 -- Grocery Retailers
 --- Convenience Retail
 --- Supermarkets
 --- Hypermarkets
 --- Discounters
 --- Warehouse Clubs
 --- Food/drink/tobacco specialists
 --- Small Local Grocers
 -- Non-Grocery Retailers
 --- General Merchandise Stores
 --- Department Stores
 --- Variety Stores
 --- Apparel and Footwear Specialists
 --- Appliances and Electronics Specialists
 --- Home Products Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending

Data removed from sample

-- Direct Selling
 - Retail E-Commerce
 Non-retail channels
 - Builder Merchants and
 Construction
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: Others includes sales from door to door selling, warehouse clubs etc

Table 107 Production of Refrigeration Appliances: Total Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Refrigeration Appliances – Production	Data removed from sample					

Source: Euromonitor International from trade sources/national statistics
 Note: '-' indicates data not available

Table 108 Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Refrigeration Appliances	Data removed from sample					
- Built-in Refrigeration Appliances						
- Freestanding Refrigeration Appliances						
- Electric Wine Coolers/ Chillers						
-- Built-in Electric Wine Coolers/Chillers						
-- Freestanding Electric Wine Coolers/Chillers						
- Freezers						
-- Built-in Freezers						
-- Freestanding Freezers						
- Fridge Freezers						
-- Built-in Fridge Freezers						
-- Freestanding Fridge Freezers						
- Fridges						
-- Built-in Fridges						
-- Freestanding Fridges						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 109 Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
-------------	------	------	------	------	------	------

- Refrigeration Appliances
 - Built-in Refrigeration Appliances
 - Freestanding Refrigeration Appliances
 - Electric Wine Coolers/Chillers
 - Built-in Electric Wine Coolers/Chillers
 - Freestanding Electric Wine Coolers/Chillers
 - Freezers
 - Built-in Freezers
 - Freestanding Freezers
 - Fridge Freezers
 - Built-in Fridge Freezers
 - Freestanding Fridge Freezers
 - Fridges
 - Built-in Fridges
 - Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 110 Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

- Refrigeration Appliances
 - Built-in Refrigeration Appliances
 - Freestanding Refrigeration Appliances
 - Electric Wine Coolers/Chillers
 - Built-in Electric Wine Coolers/Chillers
 - Freestanding Electric Wine Coolers/Chillers
 - Freezers
 - Built-in Freezers
 - Freestanding Freezers
 - Fridge Freezers
 - Built-in Fridge Freezers
 - Freestanding Fridge Freezers
 - Fridges
 - Built-in Fridges
 - Freestanding Fridges

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 111 Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

Refrigeration Appliances

- Built-in Refrigeration Appliances
- Freestanding Refrigeration Appliances
- Electric Wine Coolers/Chillers
 - Built-in Electric Wine Coolers/Chillers
 - Freestanding Electric Wine Coolers/Chillers
- Freezers
 - Built-in Freezers
 - Freestanding Freezers
- Fridge Freezers
 - Built-in Fridge Freezers
 - Freestanding Fridge Freezers
- Fridges
 - Built-in Fridges
 - Freestanding Fridges

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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AIR TREATMENT PRODUCTS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

After a year of robust growth, retail volume sales of air treatment products slow in 2023

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Rising demand for air purifiers due to worsening air quality and new brand launches

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Content removed from sample

Government initiatives boost local production of air conditioners

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PROSPECTS AND OPPORTUNITIES

Strong growth expected in volume and value terms as temperatures rise

Content removed from sample

Content removed from sample

Premiumisation trend will continue to be a major driver of value growth

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Appliances and electronics specialists to remain dominant distribution channel, while e-commerce will likely gain further share

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CATEGORY DATA

Table 112 Sales of Air Treatment Products by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Air Treatment Products	Data removed from sample					
- Air Purifiers						
- Cooling						
-- Air Conditioners						
--- Portable Room Air Conditioners						

- Split Air Conditioners
- Window Air Conditioners
- Air Coolers
- Cooling Fans
- Dehumidifiers
- Humidifiers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 Sales of Air Treatment Products by Category: Value 2018-2023

INR million

	2018	2019	2020	2021	2022	2023
Air Treatment Products	Data removed from sample					
- Air Purifiers						
- Cooling						
-- Air Conditioners						
--- Portable Room Air Conditioners						
--- Split Air Conditioners						
--- Window Air Conditioners						
-- Air Coolers						
-- Cooling Fans						
- Dehumidifiers						
- Humidifiers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 114 Sales of Air Treatment Products by Category: % Volume Growth 2018-2023

% volume growth

	2022/23	2018-23 CAGR	2018/23 Total
Air Treatment Products	Data removed from sample		
- Air Purifiers			
- Cooling			
-- Air Conditioners			
--- Portable Room Air Conditioners			
--- Split Air Conditioners			
--- Window Air Conditioners			
-- Air Coolers			
-- Cooling Fans			
- Dehumidifiers			
- Humidifiers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 115 Sales of Air Treatment Products by Category: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Air Treatment Products	Data removed from sample		
- Air Purifiers			
- Cooling			
-- Air Conditioners			
--- Portable Room Air Conditioners			
--- Split Air Conditioners			
--- Window Air Conditioners			
-- Air Coolers			
-- Cooling Fans			
- Dehumidifiers			
- Humidifiers			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		

Table 116 Sales of Air Conditioners by Connected Appliances: % Volume 2019-2023

% retail volume	2019	2020	2021	2022	2023
Smart	Data removed from sample				
Non-Smart					
Total					
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources				

Table 117 NBO Company Shares of Air Treatment Products: % Volume 2019-2023

% retail volume	2019	2020	2021	2022	2023
Company	Data removed from sample				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 118 LBN Brand Shares of Air Treatment Products: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 119 Distribution of Air Treatment Products by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 120 Production of Air Conditioners: Total Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Air Conditioners –	Data removed from sample					

Production

Source: Euromonitor International from trade sources/national statistics

Note: '-' indicates data not available

Table 121 Forecast Sales of Air Treatment Products by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Air Treatment Products	Data removed from sample					
- Air Purifiers						
- Cooling						
-- Air Conditioners						
--- Portable Room Air Conditioners						
--- Split Air Conditioners						
--- Window Air Conditioners						
-- Air Coolers						
-- Cooling Fans						
- Dehumidifiers						
- Humidifiers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 122 Forecast Sales of Air Treatment Products by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Air Treatment Products	Data removed from sample					
- Air Purifiers						
- Cooling						
-- Air Conditioners						
--- Portable Room Air Conditioners						
--- Split Air Conditioners						
--- Window Air Conditioners						
-- Air Coolers						
-- Cooling Fans						
- Dehumidifiers						
- Humidifiers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 123 Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Air Treatment Products	Data removed from sample		

- Air Purifiers
- Cooling
 - Air Conditioners
 - Portable Room Air Conditioners
 - Split Air Conditioners
 - Window Air Conditioners
 - Air Coolers
 - Cooling Fans
- Dehumidifiers
- Humidifiers

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 124 Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

% constant value growth			
	2023/2024	2023-28 CAGR	2023/28 Total
Air Treatment Products	Data removed from sample		
- Air Purifiers			
- Cooling			
- Air Conditioners			
--- Portable Room Air Conditioners			
--- Split Air Conditioners			
--- Window Air Conditioners			
-- Air Coolers			
-- Cooling Fans			
- Dehumidifiers			
- Humidifiers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

FOOD PREPARATION APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Muted growth in 2023 due to inflationary pressures

Content removed from sample

Bajaj electricals retains lead of food preparation appliances in 2023

Content removed from sample

Greater convenience and time-saving benefits key reasons for purchase

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Demand set to recover by 2025 as economic situation improves

Content removed from sample

Consumers to increasingly upgrade from basic models to premium appliances

Content removed from sample

Rising number of consumers expected to embrace e-commerce for its convenience

Content removed from sample

CATEGORY DATA

Table 125 Sales of Food Preparation Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Food Preparation Appliances	Data removed from sample					
- Blenders						
- Food Processors						
- Juice Extractors						
-- Centrifugal Juicers						
-- Slow Juicers						
- Mixers						
- Other Food Preparation Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes mincers, food slicers and other food preparation items

Table 126 Sales of Food Preparation Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Food Preparation Appliances	Data removed from sample					
- Blenders						
- Food Processors						
- Juice Extractors						
-- Centrifugal Juicers						
-- Slow Juicers						
- Mixers						
- Other Food Preparation Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes mincers, food slicers and other food preparation items

Table 127 Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Food Preparation Appliances	Data removed from sample		
- Blenders			
- Food Processors			
- Juice Extractors			
-- Centrifugal Juicers			
-- Slow Juicers			
- Mixers			
- Other Food Preparation Appliances			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		
Note:	Others includes mincers, food slicers and other food preparation items		

Table 128 Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Food Preparation Appliances	Data removed from sample		
- Blenders			
- Food Processors			
- Juice Extractors			
-- Centrifugal Juicers			
-- Slow Juicers			
- Mixers			
- Other Food Preparation Appliances			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		
Note:	Others includes mincers, food slicers and other food preparation items		

Table 129 NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 130 LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 131 Distribution of Food Preparation Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 132 Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Food Preparation Appliances	Data removed from sample					
- Blenders						
- Food Processors						
- Juice Extractors						
-- Centrifugal Juicers						
-- Slow Juicers						
- Mixers						

- Other Food
Preparation Appliances

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Other includes mincers, food slicers and other food preparation items

Table 133 Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028

INR million

	2023	2024	2025	2026	2027	2028
Food Preparation Appliances	Data removed from sample					
- Blenders						
- Food Processors						
- Juice Extractors						
-- Centrifugal Juicers						
-- Slow Juicers						
- Mixers						
- Other Food Preparation Appliances						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Other includes mincers, food slicers and other food preparation items

Table 134 Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
Food Preparation Appliances	Data removed from sample		
- Blenders			
- Food Processors			
- Juice Extractors			
-- Centrifugal Juicers			
-- Slow Juicers			
- Mixers			
- Other Food Preparation Appliances			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Other includes mincers, food slicers and other food preparation items

Table 135 Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Food Preparation Appliances	Data removed from sample		
- Blenders			
- Food Processors			
- Juice Extractors			
-- Centrifugal Juicers			
-- Slow Juicers			
- Mixers			

- Other Food Preparation Appliances**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Other includes mincers, food slicers and other food preparation items

PERSONAL CARE APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

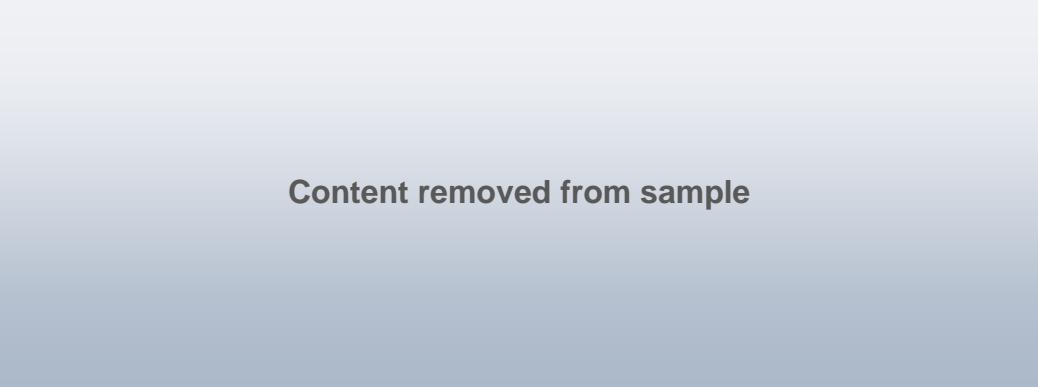
Increasing mobility leads to greater demand for personal care appliances

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Philips india retains category lead, driven by wide portfolio and frequent new launches

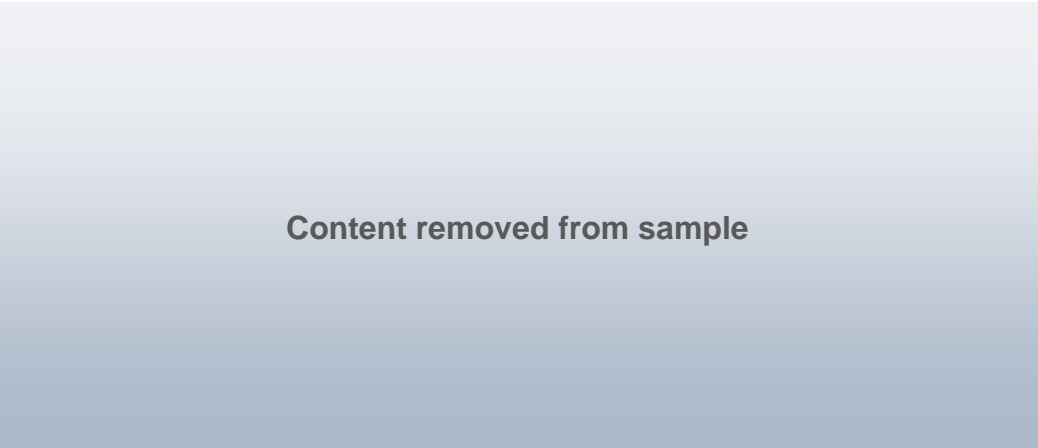
Content removed from sample

Male grooming products experience growing demand

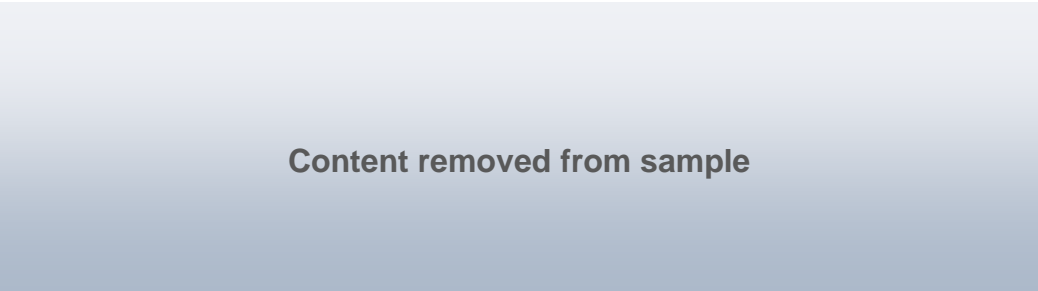


PROSPECTS AND OPPORTUNITIES

Solid growth projected for personal care appliances over the forecast period



Retail e-commerce to remain a major platform for personal care appliances



CATEGORY DATA

Table 136 Sales of Personal Care Appliances by Category: Volume 2018-2023

'000 units

	2018	2019	2020	2021	2022	2023
Personal Care Appliances	Data removed from sample					
- Body Shavers						
- Electric Facial Cleansers						
- Hair Care Appliances						
- Oral Care Appliances						
-- Battery Toothbrush Units						
-- Electric Toothbrush Units						
-- Other Oral Care Appliances						
- Other Personal Care Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 137 Sales of Personal Care Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Personal Care Appliances	Data removed from sample					
- Body Shavers						
- Electric Facial Cleansers						
- Hair Care Appliances						
- Oral Care Appliances						
-- Battery Toothbrush Units						
-- Electric Toothbrush Units						
-- Other Oral Care Appliances						
- Other Personal Care Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 138 Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Personal Care Appliances	Data removed from sample		
- Body Shavers			
- Electric Facial Cleansers			
- Hair Care Appliances			
- Oral Care Appliances			
-- Battery Toothbrush Units			
-- Electric Toothbrush Units			
-- Other Oral Care Appliances			
- Other Personal Care Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 139 Sales of Personal Care Appliances by Category: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Personal Care Appliances	Data removed from sample		
- Body Shavers			
- Electric Facial Cleansers			
- Hair Care Appliances			
- Oral Care Appliances			
-- Battery Toothbrush Units			
-- Electric Toothbrush Units			
-- Other Oral Care Appliances			
- Other Personal Care Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 140 Sales of Body Shavers by Format: % Volume 2018-2023

% retail volume

	2018	2019	2020	2021	2022	2023
Men's Shavers	Data removed from sample					
Men's Shavers - Wet						
Men's Shavers - Dry						
Women's Shavers						
Depilators						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 141 Sales of Hair Care Appliances by Format: % Volume 2018-2023

% retail volume

	2018	2019	2020	2021	2022	2023
Hair Dryers	Data removed from sample					
Hair Styling Appliances						
Hair and Beard Trimmers						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 142 NBO Company Shares of Personal Care Appliances 2019-2023

% retail volume

Company	2019	2020	2021	2022	2023
	Data removed from sample				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 143 LBN Brand Shares of Personal Care Appliances 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 144 Distribution of Personal Care Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
-----------------	------	------	------	------	------	------

Retail Channels

- Retail Offline
 - Grocery Retailers
 - Convenience Retail
 - Supermarkets
 - Hypermarkets
 - Discounters
 - Warehouse Clubs
 - Food/drink/tobacco specialists
 - Small Local Grocers
 - Non-Grocery Retailers
 - General Merchandise Stores
 - Department Stores
 - Variety Stores
 - Apparel and Footwear Specialists
 - Appliances and Electronics Specialists
 - Home Products Specialists
 - Health and Beauty Specialists
 - Leisure and Personal Goods Specialists
 - Other Non-Grocery Retailers

Data removed from sample

-- Vending
 -- Direct Selling
 - Retail E-Commerce
 Non-retail channels
 - Builder Merchants and
 Construction
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 145 Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Personal Care Appliances	Data removed from sample					
- Body Shavers						
- Electric Facial Cleansers						
- Hair Care Appliances						
- Oral Care Appliances						
-- Battery Toothbrush Units						
-- Electric Toothbrush Units						
-- Other Oral Care Appliances						
- Other Personal Care Appliances						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 146 Forecast Sales of Personal Care Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Personal Care Appliances	Data removed from sample					
- Body Shavers						
- Electric Facial Cleansers						
- Hair Care Appliances						
- Oral Care Appliances						
-- Battery Toothbrush Units						
-- Electric Toothbrush Units						
-- Other Oral Care Appliances						
- Other Personal Care Appliances						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 147 **Forecast Sales of Personal Care Appliances by Category: % Volume Growth**
2023-2028

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

Personal Care Appliances
 - Body Shavers
 - Electric Facial Cleansers
 - Hair Care Appliances
 - Oral Care Appliances
 -- Battery Toothbrush Units
 -- Electric Toothbrush Units
 -- Other Oral Care Appliances
 - Other Personal Care Appliances

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 148 **Forecast Sales of Personal Care Appliances by Category: % Value Growth**
2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

Personal Care Appliances
 - Body Shavers
 - Electric Facial Cleansers
 - Hair Care Appliances
 - Oral Care Appliances
 -- Battery Toothbrush Units
 -- Electric Toothbrush Units
 -- Other Oral Care Appliances
 - Other Personal Care Appliances

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SMALL COOKING APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Growth slows in 2023, but still remains in positive territory

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Ttk prestige retains lead of small cooking appliances due to established presence

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E-commerce continues to gain share of distribution

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Content removed from sample

PROSPECTS AND OPPORTUNITIES

Positive demand expected for small cooking appliances in the coming years

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Demand for premium small cooking appliances on the rise

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Light fryers and rice cookers to outperform category over the forecast period

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CATEGORY DATA

Table 149 Sales of Small Cooking Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Small Cooking Appliances	Data removed from sample					
- Breadmakers						
- Coffee Machines						
-- Standard Coffee Machines						
--- Espresso Coffee Machines						
--- Filter Coffee Machines						
--- Other Standard Coffee Machines						
-- Pod Coffee Machines						
--- Hard Pods						
--- Soft Pods						
- Coffee Mills						
- Fryers						
-- Light Fryers						
-- Deep Fat Fryers						
- Electric Grills						
- Electric Steamers						
- Freestanding Hobs						
- Kettles						
- Rice Cookers						
- Slow Cookers						
- Other Small Cooking Appliances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 150 Sales of Small Cooking Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Small Cooking Appliances	Data removed from sample					

- Breadmakers
- Coffee Machines
 - Standard Coffee Machines
 - Espresso Coffee Machines
 - Filter Coffee Machines
 - Other Standard Coffee Machines
- Pod Coffee Machines
 - Hard Pods
 - Soft Pods
- Coffee Mills
- Fryers
 - Light Fryers
 - Deep Fat Fryers
- Electric Grills
- Electric Steamers
- Freestanding Hobs
- Kettles
- Rice Cookers
- Slow Cookers
- Other Small Cooking Appliances

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 151 Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

- Small Cooking Appliances
 - Breadmakers
 - Coffee Machines
 - Standard Coffee Machines
 - Espresso Coffee Machines
 - Filter Coffee Machines
 - Other Standard Coffee Machines
 - Pod Coffee Machines
 - Hard Pods
 - Soft Pods
 - Coffee Mills
 - Fryers
 - Light Fryers
 - Deep Fat Fryers
 - Electric Grills
 - Electric Steamers
 - Freestanding Hobs
 - Kettles
 - Rice Cookers
 - Slow Cookers
 - Other Small Cooking Appliances

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 152 Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Small Cooking Appliances	Data removed from sample		
- Breadmakers			
- Coffee Machines			
-- Standard Coffee Machines			
--- Espresso Coffee Machines			
--- Filter Coffee Machines			
--- Other Standard Coffee Machines			
-- Pod Coffee Machines			
--- Hard Pods			
--- Soft Pods			
- Coffee Mills			
- Fryers			
-- Light Fryers			
-- Deep Fat Fryers			
- Electric Grills			
- Electric Steamers			
- Freestanding Hobs			
- Kettles			
- Rice Cookers			
- Slow Cookers			
- Other Small Cooking Appliances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

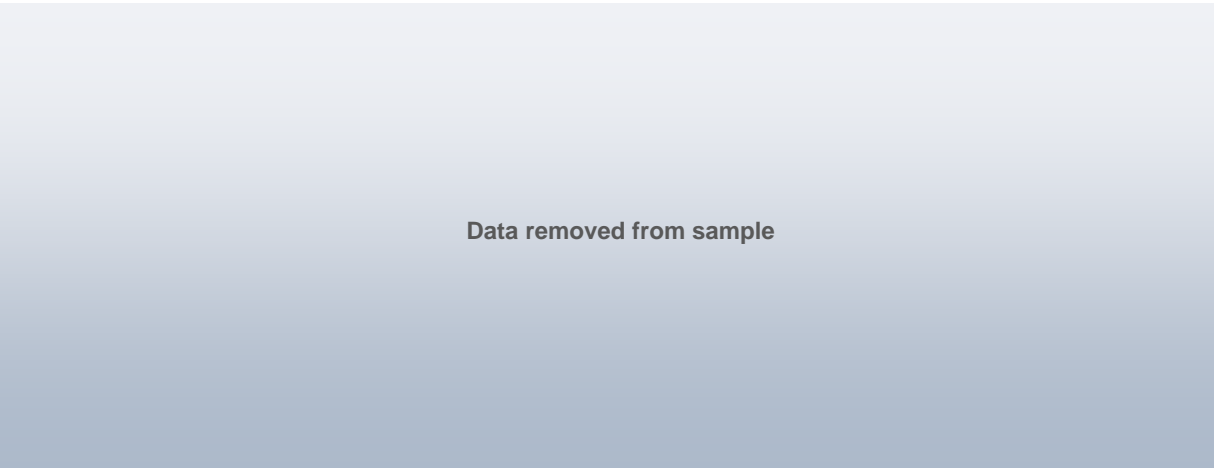
Table 153 Sales of Freestanding Hobs by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Gas	Data removed from sample					
Standard Electric						
Mixed						
Vitroc ceramic						
Induction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 154 NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 155 LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 156 Distribution of Small Cooking Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 157 Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Small Cooking Appliances	Data removed from sample					
- Breadmakers						
- Coffee Machines						
-- Standard Coffee Machines						

- Espresso Coffee Machines
- Filter Coffee Machines
- Other Standard Coffee Machines
- Pod Coffee Machines
- Hard Pods
- Soft Pods
- Coffee Mills
- Fryers
- Light Fryers
- Deep Fat Fryers
- Electric Grills
- Electric Steamers
- Freestanding Hobs
- Kettles
- Rice Cookers
- Slow Cookers
- Other Small Cooking Appliances

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 158 Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

INR million

2023 2024 2025 2026 2027 2028

- Small Cooking Appliances
- Breadmakers
- Coffee Machines
- Standard Coffee Machines
- Espresso Coffee Machines
- Filter Coffee Machines
- Other Standard Coffee Machines
- Pod Coffee Machines
- Hard Pods
- Soft Pods
- Coffee Mills
- Fryers
- Light Fryers
- Deep Fat Fryers
- Electric Grills
- Electric Steamers
- Freestanding Hobs
- Kettles
- Rice Cookers
- Slow Cookers
- Other Small Cooking Appliances

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 159 Forecast Sales of Small Cooking Appliances by Category: % Volume Growth
2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Small Cooking Appliances - Breadmakers - Coffee Machines -- Standard Coffee Machines --- Espresso Coffee Machines --- Filter Coffee Machines --- Other Standard Coffee Machines -- Pod Coffee Machines --- Hard Pods --- Soft Pods - Coffee Mills - Fryers -- Light Fryers -- Deep Fat Fryers - Electric Grills - Electric Steamers - Freestanding Hobs - Kettles - Rice Cookers - Slow Cookers - Other Small Cooking Appliances	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 160 Forecast Sales of Small Cooking Appliances by Category: % Value Growth
2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Small Cooking Appliances - Breadmakers - Coffee Machines -- Standard Coffee Machines --- Espresso Coffee Machines --- Filter Coffee Machines --- Other Standard Coffee Machines -- Pod Coffee Machines --- Hard Pods --- Soft Pods - Coffee Mills - Fryers -- Light Fryers -- Deep Fat Fryers - Electric Grills - Electric Steamers - Freestanding Hobs - Kettles - Rice Cookers - Slow Cookers - Other Small Cooking Appliances	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

VACUUM CLEANERS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Growth slows due to economic uncertainty and the return of domestic help

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Wet and dry format gains popularity among indian consumers

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Robotic vacuum cleaners emerge in the indian market

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PROSPECTS AND OPPORTUNITIES

Demand for vacuum cleaners expected to stagnate over forecast period

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Appliances and electronics specialists to remain leading channel, although e-commerce is set to record strong growth

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CATEGORY DATA

Table 161 Sales of Vacuum Cleaners by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Vacuum Cleaners	Data removed from sample					
- Standard Vacuum Cleaners						
-- Cylinder Vacuum Cleaners						
-- Handheld Vacuum Cleaners						
-- Stick Vacuum Cleaners						
-- Upright Vacuum Cleaners						
-- Steam Vacuum Cleaners						
- Robotic Vacuum Cleaners						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 162 Sales of Vacuum Cleaners by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Vacuum Cleaners	Data removed from sample					
- Standard Vacuum Cleaners						
-- Cylinder Vacuum Cleaners						
-- Handheld Vacuum Cleaners						
-- Stick Vacuum Cleaners						
-- Upright Vacuum Cleaners						
-- Steam Vacuum Cleaners						
- Robotic Vacuum Cleaners						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 163 Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Vacuum Cleaners	Data removed from sample		
- Standard Vacuum Cleaners			
-- Cylinder Vacuum Cleaners			
-- Handheld Vacuum Cleaners			
-- Stick Vacuum Cleaners			
-- Upright Vacuum Cleaners			
-- Steam Vacuum Cleaners			
- Robotic Vacuum Cleaners			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 164 Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Vacuum Cleaners	Data removed from sample		
- Standard Vacuum Cleaners			
-- Cylinder Vacuum Cleaners			
-- Handheld Vacuum Cleaners			
-- Stick Vacuum Cleaners			
-- Upright Vacuum Cleaners			
- Steam Vacuum Cleaners			
- Robotic Vacuum Cleaners			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 165 NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 166 LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 167 Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Builder Merchants and Construction						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Others includes sales from door to door selling, warehouse clubs etc

Table 168 Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Vacuum Cleaners	Data removed from sample					
- Standard Vacuum Cleaners						
-- Cylinder Vacuum Cleaners						

- Handheld Vacuum Cleaners
- Stick Vacuum Cleaners
- Upright Vacuum Cleaners
- Steam Vacuum Cleaners
- Robotic Vacuum Cleaners

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 169 Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

INR million

2023 2024 2025 2026 2027 2028

- Vacuum Cleaners
- Standard Vacuum Cleaners
- Cylinder Vacuum Cleaners
- Handheld Vacuum Cleaners
- Stick Vacuum Cleaners
- Upright Vacuum Cleaners
- Steam Vacuum Cleaners
- Robotic Vacuum Cleaners

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 170 Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

- Vacuum Cleaners
- Standard Vacuum Cleaners
- Cylinder Vacuum Cleaners
- Handheld Vacuum Cleaners
- Stick Vacuum Cleaners
- Upright Vacuum Cleaners
- Steam Vacuum Cleaners
- Robotic Vacuum Cleaners

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 171 Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Vacuum Cleaners
- Standard Vacuum Cleaners
- Cylinder Vacuum Cleaners
- Handheld Vacuum Cleaners

Data removed from sample

- Stick Vacuum Cleaners
- Upright Vacuum Cleaners
- Steam Vacuum Cleaners
- Robotic Vacuum Cleaners

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources