



Passport

Dishwashers in India

Euromonitor International

February 2024

This sample report is for illustration
purposes only.

Some content and data have been
changed.

To purchase a full version, please visit
www.euromonitor.com

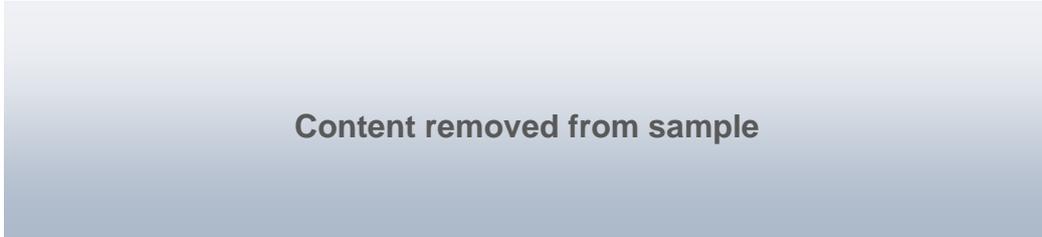
LIST OF CONTENTS AND TABLES

| | |
|---|----|
| Dishwashers in India - Category Analysis | 1 |
| KEY DATA FINDINGS..... | 1 |
| 2023 DEVELOPMENTS..... | 1 |
| Normalising of demand post-pandemic, hindered by inflationary concerns and the return of domestic help..... | 1 |
| Bosch retains slim lead of dishwashers in 2023 | 1 |
| Offline stores continue to dominate distribution | 2 |
| PROSPECTS AND OPPORTUNITIES..... | 2 |
| Category growth to remain muted over the forecast period | 2 |
| Localisation the way forward to ensure greater penetration of dishwashers..... | 2 |
| CATEGORY DATA..... | 3 |
| Table 1 Sales of Dishwashers by Category: Volume 2018-2023 | 3 |
| Table 2 Sales of Dishwashers by Category: Value 2018-2023 | 3 |
| Table 3 Sales of Dishwashers by Category: % Volume Growth 2018-2023..... | 3 |
| Table 4 Sales of Dishwashers by Category: % Value Growth 2018-2023..... | 3 |
| Table 5 Sales of Dishwashers by Format: % Volume 2018-2023 | 3 |
| Table 6 Sales of Dishwashers by Connected Appliances: % Volume 2019-2023 | 4 |
| Table 7 NBO Company Shares of Dishwashers: % Volume 2019-2023 | 4 |
| Table 8 LBN Brand Shares of Dishwashers: % Volume 2020-2023..... | 4 |
| Table 9 Distribution of Dishwashers by Format: % Volume 2018-2023 | 5 |
| Table 10 Forecast Sales of Dishwashers by Category: Volume 2023-2028 | 5 |
| Table 11 Forecast Sales of Dishwashers by Category: Value 2023-2028 | 6 |
| Table 12 Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028 | 6 |
| Table 13 Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028 | 6 |
| Consumer Appliances in India - Industry Overview | 7 |
| EXECUTIVE SUMMARY | 7 |
| Consumer appliances in 2023: The big picture..... | 7 |
| 2023 key trends | 7 |
| Competitive landscape | 8 |
| Retailing developments | 8 |
| What next for consumer appliances?..... | 9 |
| MARKET INDICATORS | 9 |
| Table 14 Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024..... | 9 |
| Table 15 Replacement Cycles of Consumer Appliances by Category 2018-2024 | 10 |
| MARKET DATA..... | 12 |
| Table 16 Sales of Consumer Appliances by Category: Volume 2018-2023..... | 12 |
| Table 17 Sales of Consumer Appliances by Category: Value 2018-2023..... | 12 |
| Table 18 Sales of Consumer Appliances by Category: % Volume Growth 2018-2023 | 12 |
| Table 19 Sales of Consumer Appliances by Category: % Value Growth 2018-2023 | 12 |

| | | |
|------------------|--|----|
| Table 20 | Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023..... | 12 |
| Table 21 | Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023..... | 14 |
| Table 22 | Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023 | 15 |
| Table 23 | Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023 | 16 |
| Table 24 | Sales of Small Appliances by Category: Volume 2018-2023 | 17 |
| Table 25 | Sales of Small Appliances by Category: Value 2018-2023 | 17 |
| Table 26 | Sales of Small Appliances by Category: % Volume Growth 2018-2023..... | 18 |
| Table 27 | Sales of Small Appliances by Category: % Value Growth 2018-2023..... | 18 |
| Table 28 | NBO Company Shares of Major Appliances: % Volume 2019-2023 | 18 |
| Table 29 | LBN Brand Shares of Major Appliances: % Volume 2020-2023..... | 19 |
| Table 30 | NBO Company Shares of Small Appliances: % Volume 2019-2023 | 20 |
| Table 31 | LBN Brand Shares of Small Appliances: % Volume 2020-2023..... | 21 |
| Table 32 | Distribution of Major Appliances by Format: % Volume 2018-2023 | 22 |
| Table 33 | Distribution of Small Appliances by Format: % Volume 2018-2023 | 22 |
| Table 34 | Forecast Sales of Consumer Appliances by Category: Volume 2023-2028 | 23 |
| Table 35 | Forecast Sales of Consumer Appliances by Category: Value 2023-2028 | 23 |
| Table 36 | Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028 | 24 |
| Table 37 | Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028 | 24 |
| Table 38 | Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028 | 24 |
| Table 39 | Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028 | 25 |
| Table 40 | Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028..... | 27 |
| Table 41 | Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028..... | 28 |
| Table 42 | Forecast Sales of Small Appliances by Category: Volume 2023-2028..... | 29 |
| Table 43 | Forecast Sales of Small Appliances by Category: Value 2023-2028 | 29 |
| Table 44 | Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028 | 29 |
| Table 45 | Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028 | 30 |
| DISCLAIMER | | 30 |
| SOURCES..... | | 30 |
| Summary 1 | Research Sources..... | 30 |

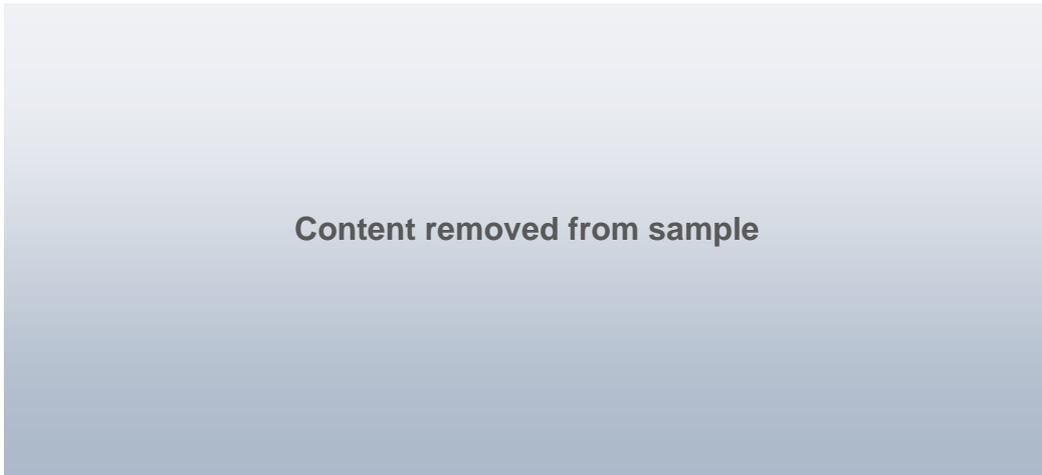
DISHWASHERS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

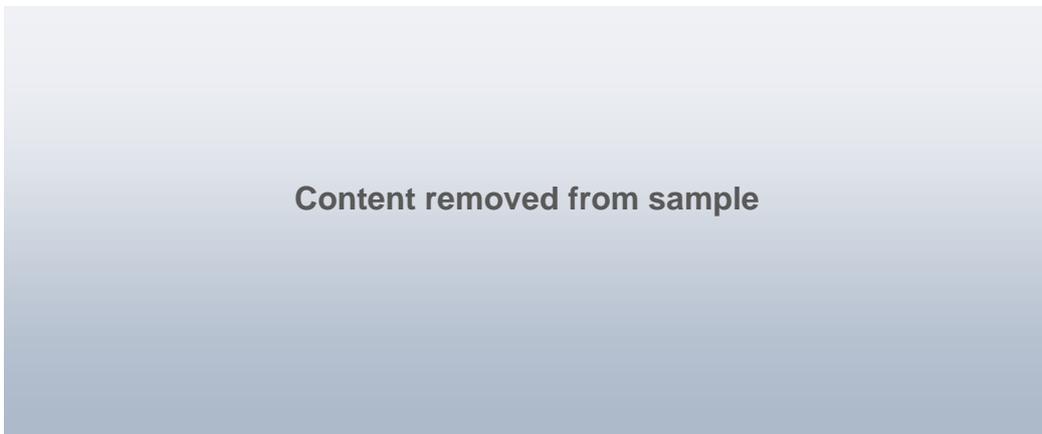


2023 DEVELOPMENTS

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



Bosch retains slim lead of dishwashers in 2023



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 1 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 2 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 3 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 4 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 5 Sales of Dishwashers by Format: % Volume 2018-2023

| % retail volume | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-----------------|---------------------------------|------|------|------|------|------|
| Table-Top | Data removed from sample | | | | | |
| 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 6 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 7 NBO Company Shares of Dishwashers: % 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 8 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 9 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 10 Forecast Sales of Dishwashers by Category: Volume 2023-2028

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

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

Table 11 Forecast Sales of Dishwashers by Category: Value 2023-2028

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

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

Table 12 Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028

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

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

Table 13 Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

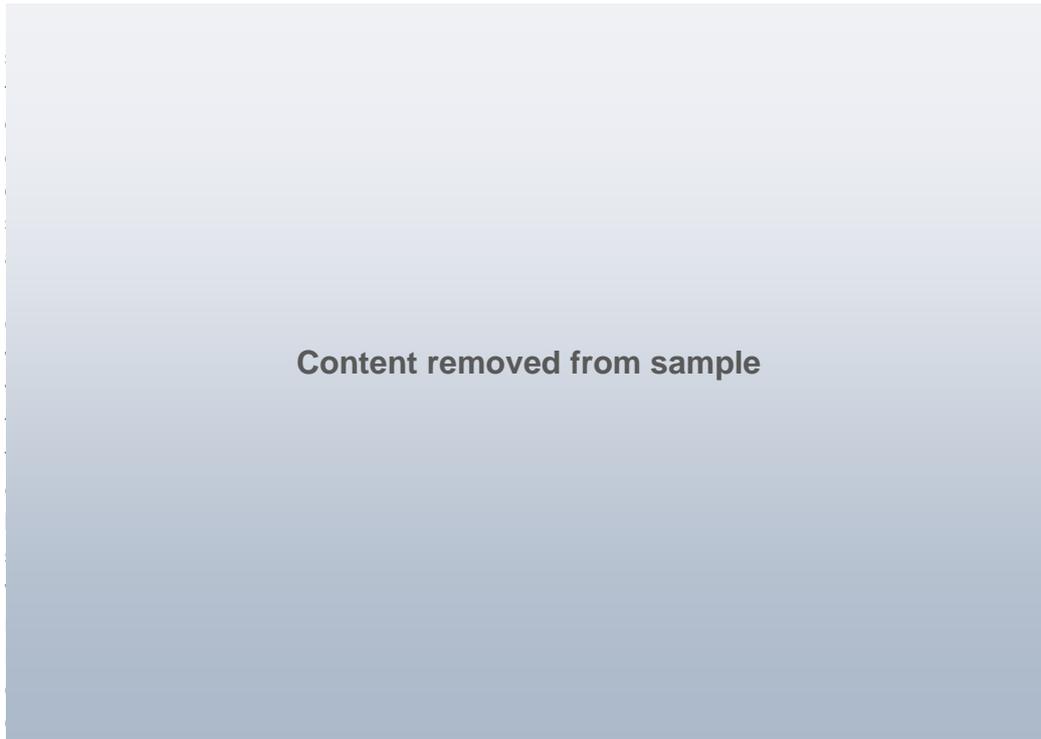
| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|---|--------------------------|--------------|---------------|
| Dishwashers - Built-in Dishwashers - Freestanding Dishwashers | Data removed from sample | | |

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

CONSUMER APPLIANCES IN INDIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture



2023 key trends



Content removed from sample

Competitive landscape

Content removed from sample

Retailing developments

Content removed from sample

Content removed from sample

What next for consumer appliances?

Content removed from sample

MARKET INDICATORS

Table 14 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



2024

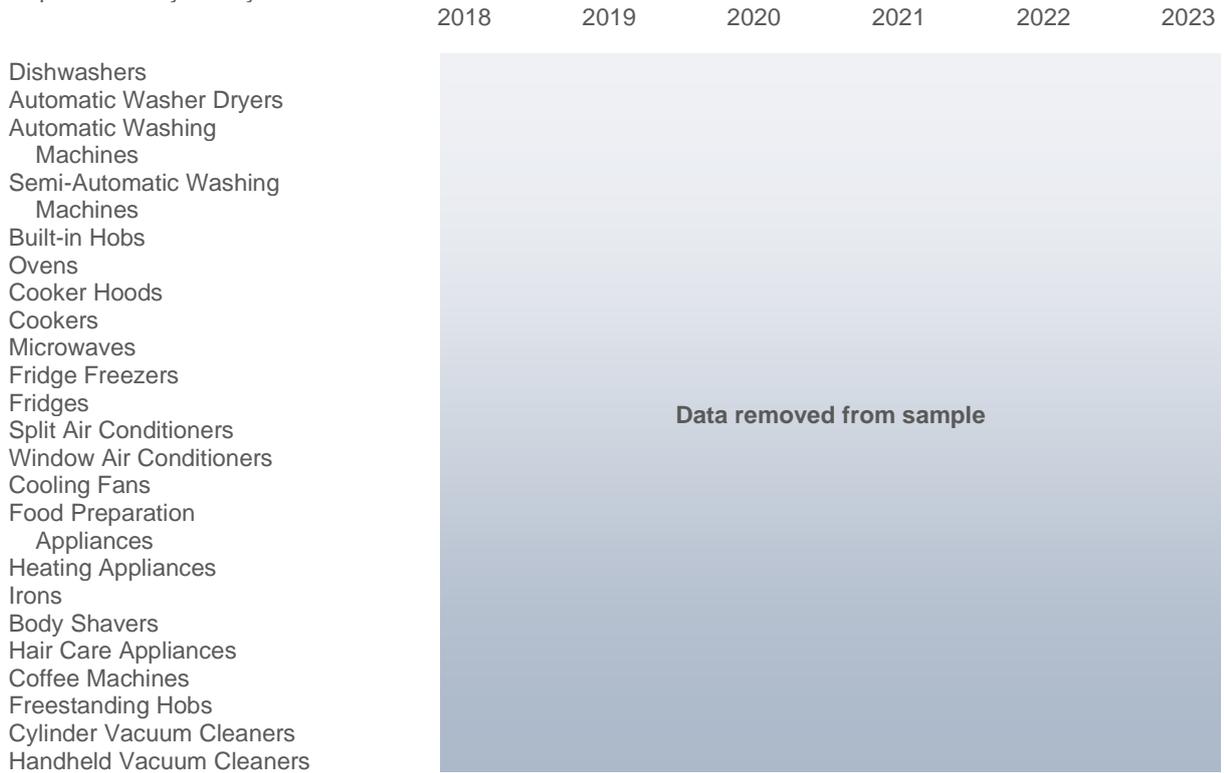
Dishwashers
 Automatic Dryers
 Automatic Washer Dryers
 Automatic Washing Machines
 Semi-Automatic Washing Machines
 Built-in Hobs
 Ovens
 Cooker Hoods
 Cookers
 Range Cookers
 Microwaves
 Electric Wine Coolers/ Chillers
 Freezers
 Fridge Freezers
 Fridges
 Portable Room Air Conditioners
 Split Air Conditioners
 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



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

Table 15 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 16 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 17 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 18 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 19 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 | | | |

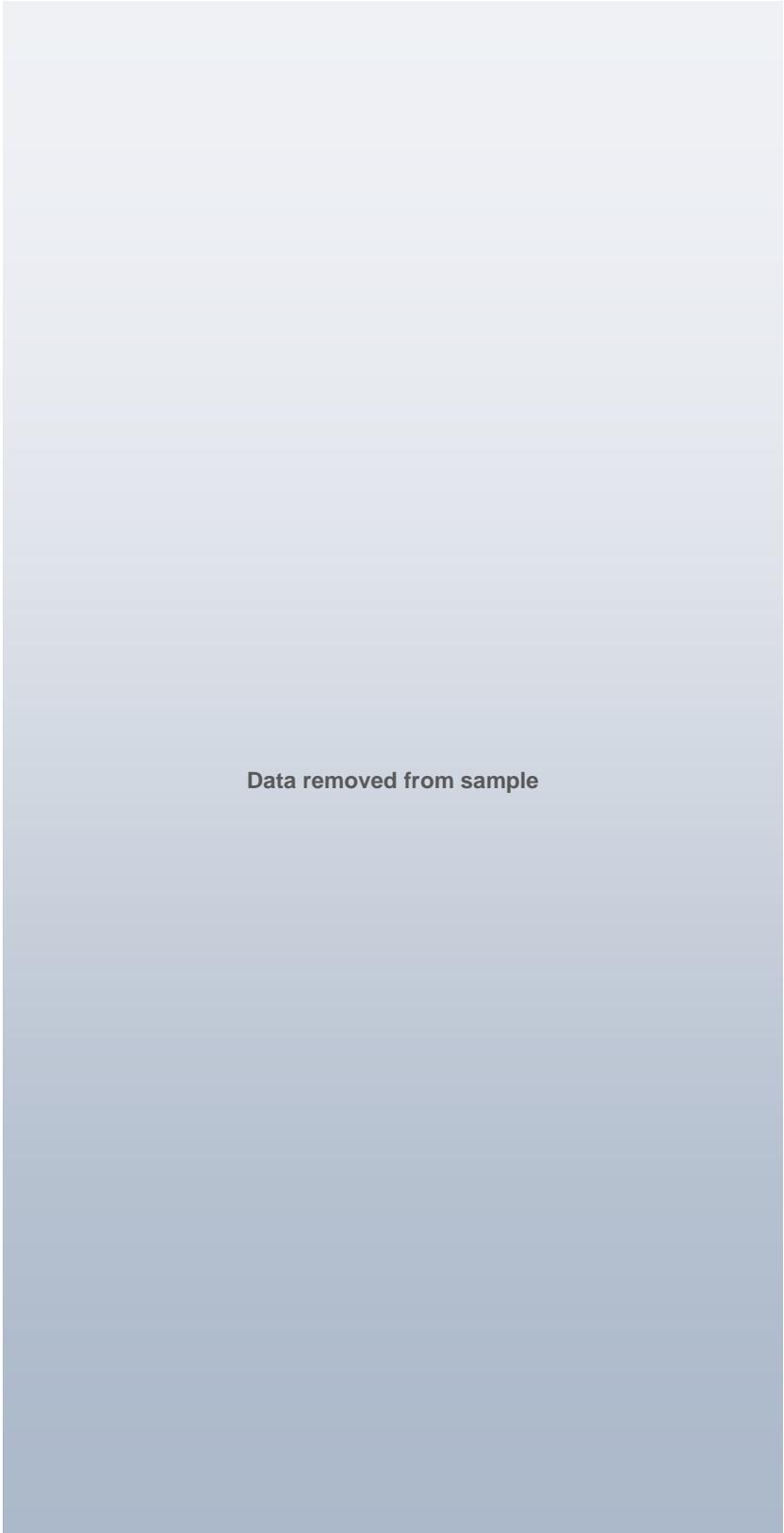
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 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/



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

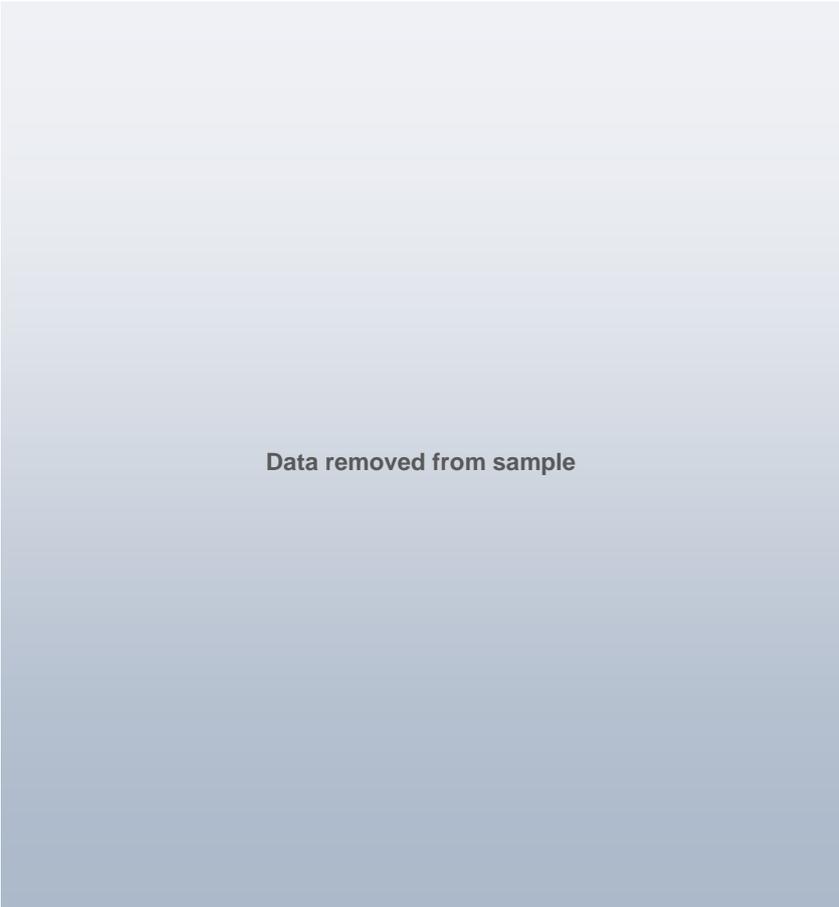


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 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



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

Table 22 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 | | | |



- 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



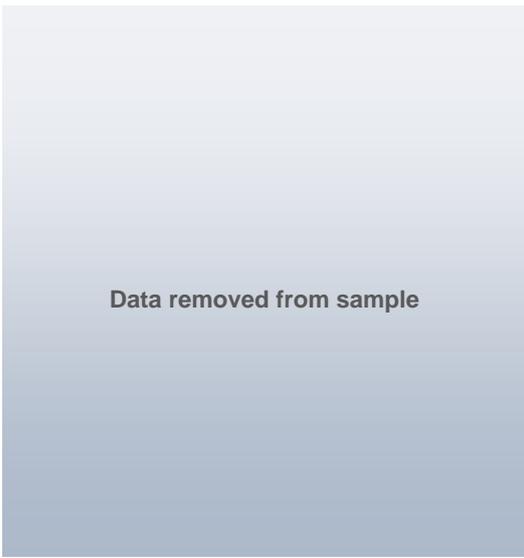
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 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



- 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



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

Table 24 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 25 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 26 Sales of Small Appliances by Category: % Volume Growth 2018-2023

| % volume growth | 2022/23 | 2018-23 CAGR | 2018/23 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 official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Small Appliances by Category: % Value Growth 2018-2023

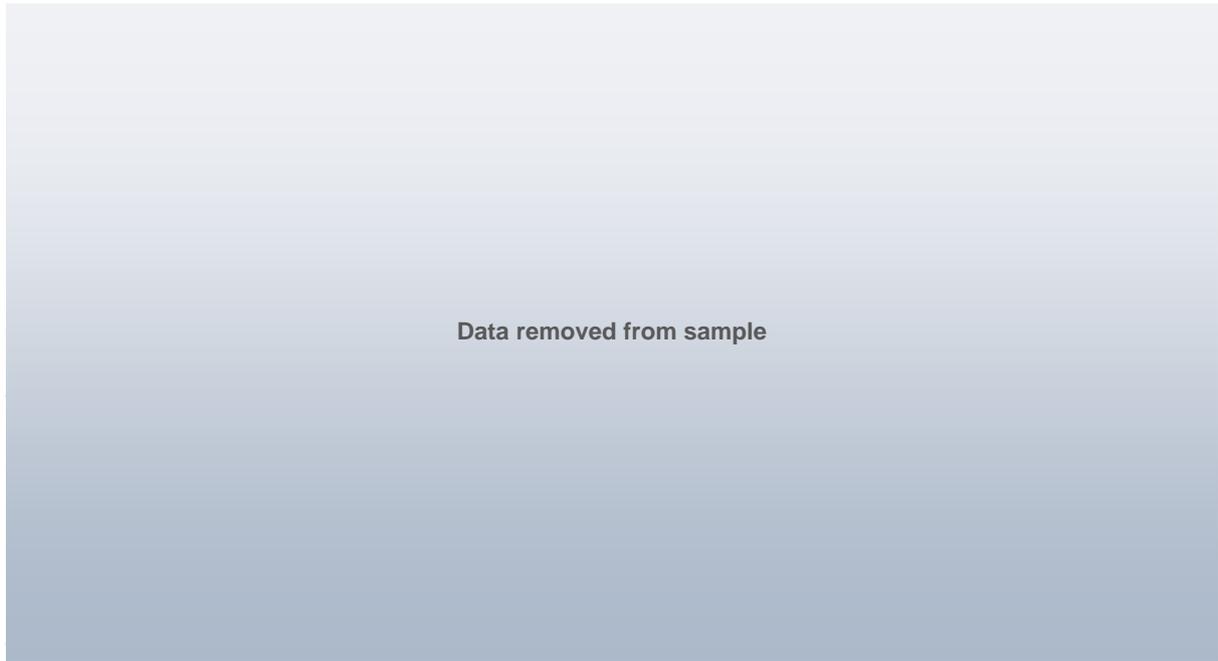
| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|-----------------------------|---------------------------------|--------------|---------------|
| Small Appliances | Data removed from sample | | |
| Air Treatment Products | | | |
| Food Preparation Appliances | | | |
| Heating Appliances | | | |
| Irons | | | |
| Personal Care Appliances | | | |
| Small Cooking Appliances | | | |
| Vacuum Cleaners | | | |

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

Table 28 NBO Company Shares of Major Appliances: % Volume 2019-2023

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

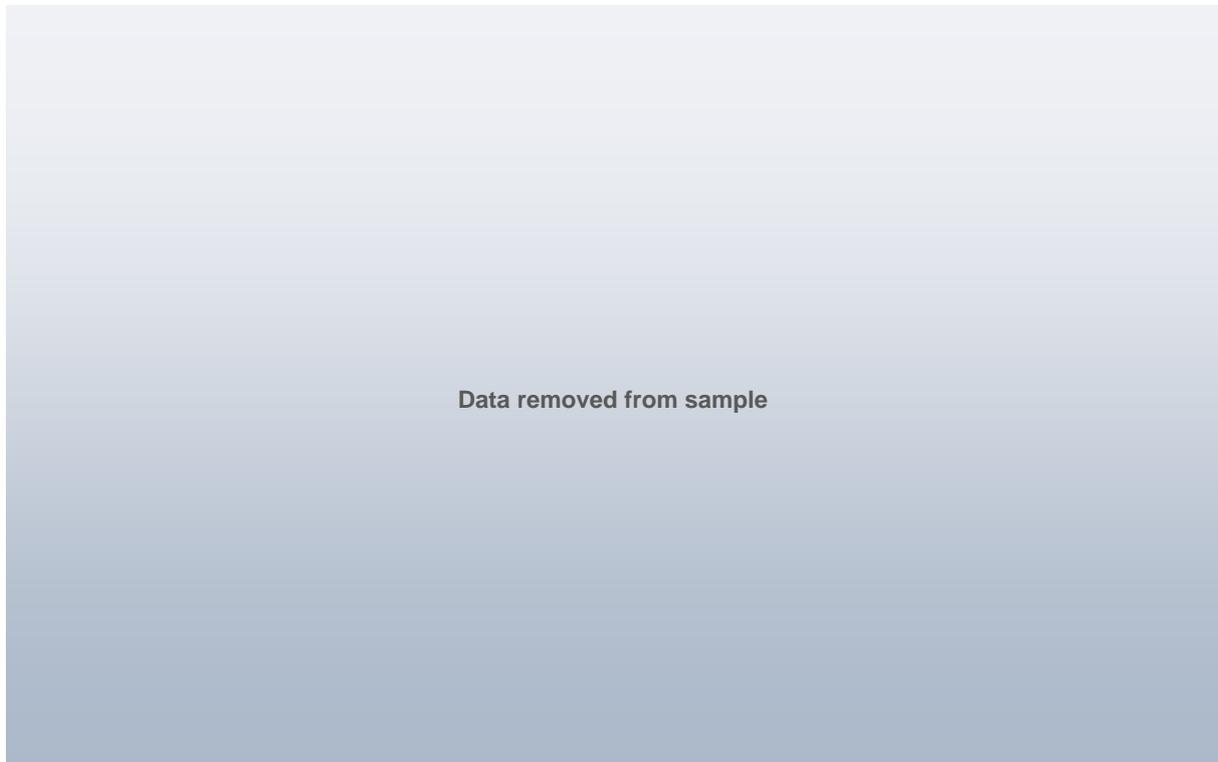
Data removed from sample



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

Table 29 LBN Brand Shares of Major Appliances: % Volume 2020-2023

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

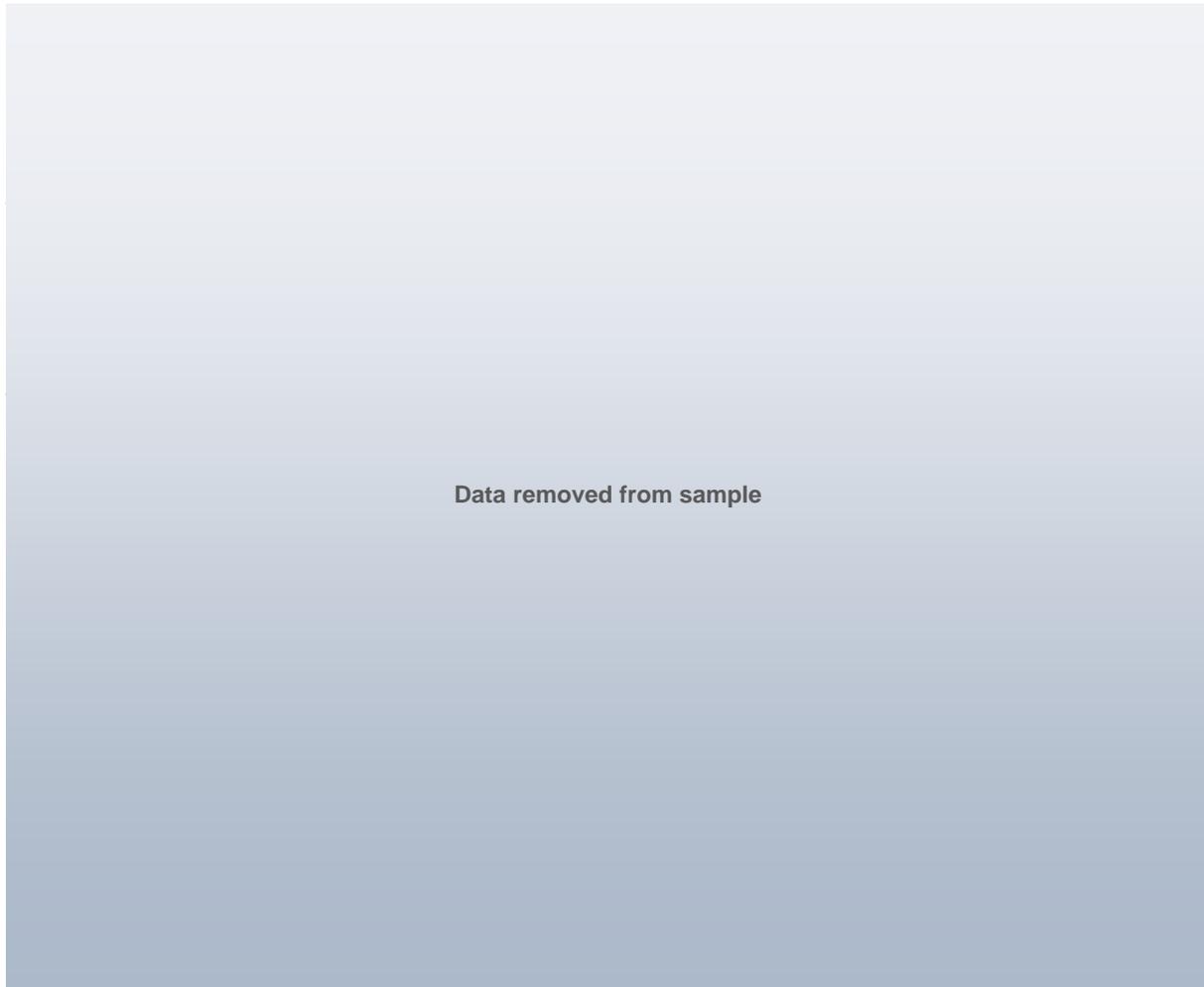




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 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 31 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 32 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 | | | | | | |

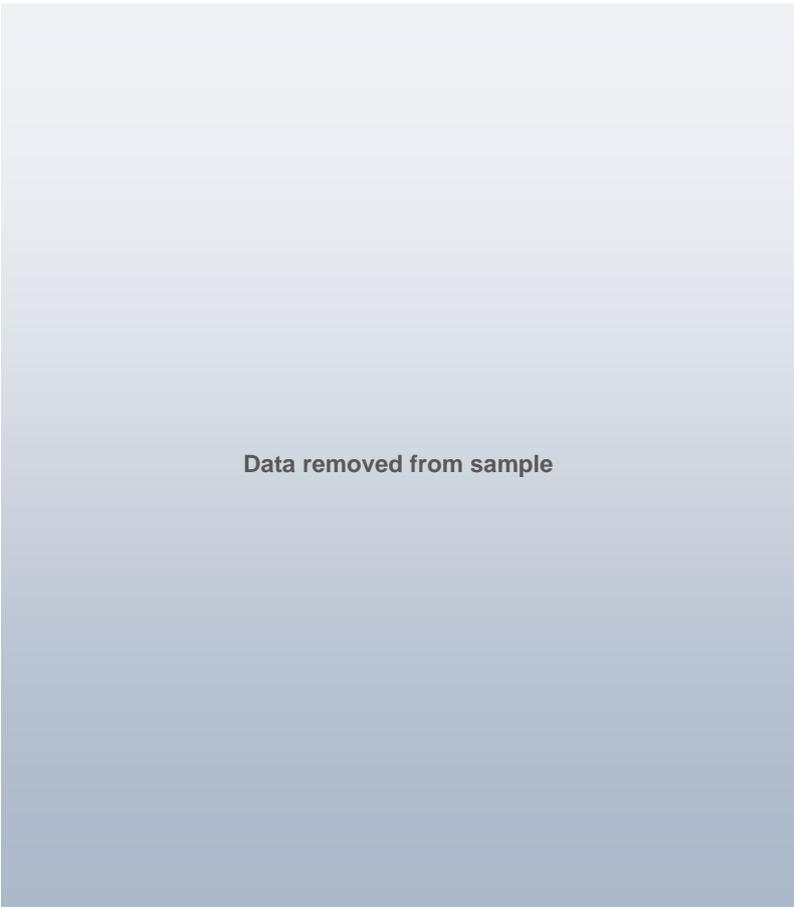
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

Table 33 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



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 34 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 | Data removed from sample | | | | | |
| Small Appliances | Data removed from sample | | | | | |

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

Table 35 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 | Data removed from sample | | | | | |
| Small Appliances | Data removed from sample | | | | | |

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

Table 36 Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

| % volume growth | 2023/24 | 2023-28 CAGR | 2023/28 Total |
|---------------------|---------|--------------|---------------|
| Consumer Appliances | 4.9 | 5.0 | 27.9 |
| Major Appliances | 5.0 | 5.2 | 28.8 |
| Small Appliances | 4.9 | 5.0 | 27.7 |

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

Table 37 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

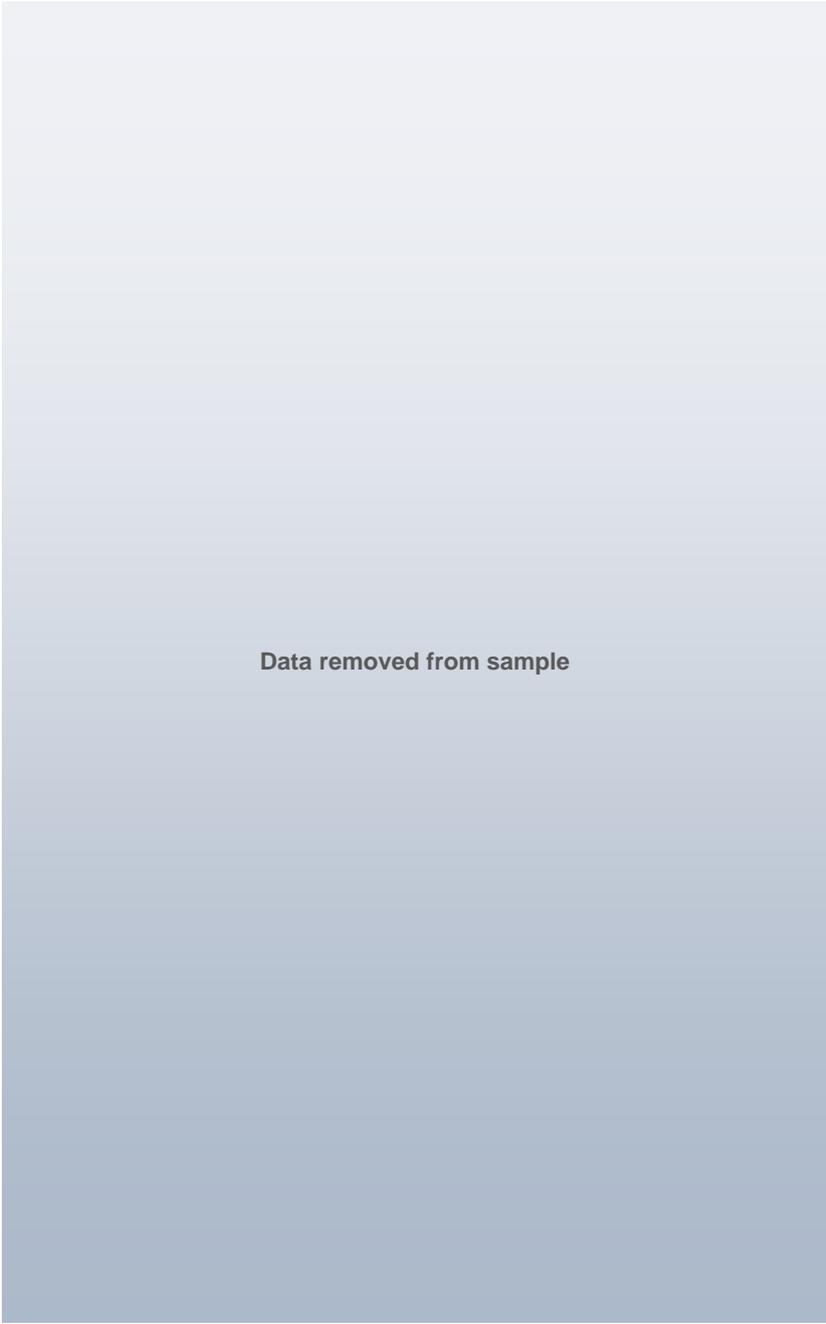
| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|-------------------------|---------------------------------|--------------|---------------|
| Consumer Appliances | Data removed from sample | | |
| Major Appliances | | | |
| Small Appliances | | | |

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

Table 38 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



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

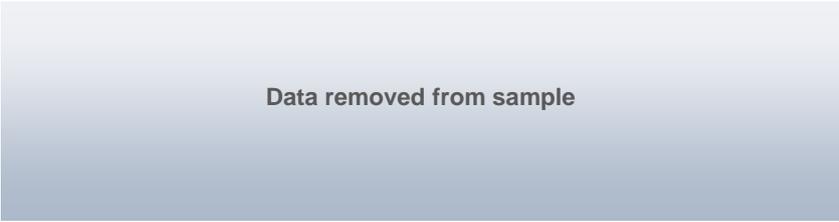
Table 39 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---------------------------|--------------------------|------|------|------|------|------|
| Major Appliances | 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

Data removed from sample

- 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 40 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 41 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 | 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 42 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 43 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 44 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 45 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

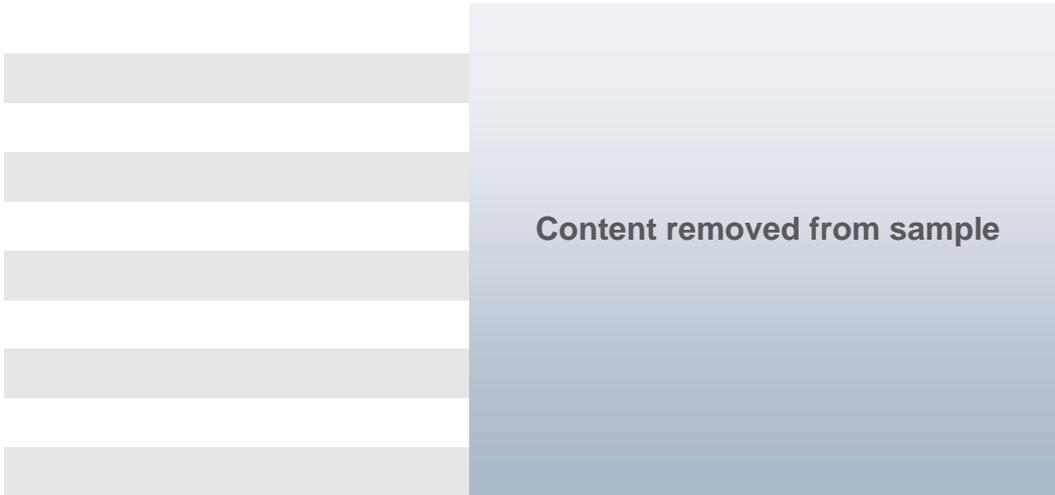
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on 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