



Passport

Refrigeration Appliances in India

Euromonitor International

February 2024

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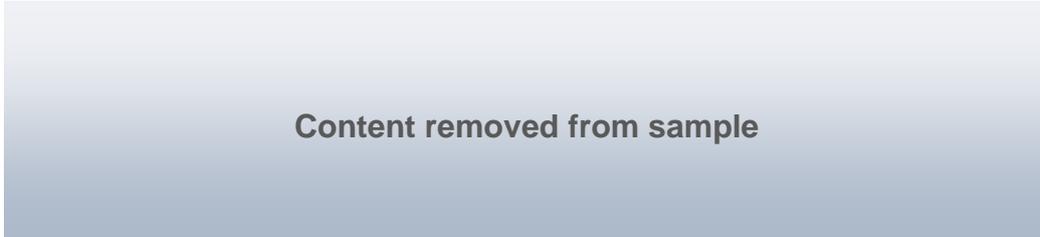
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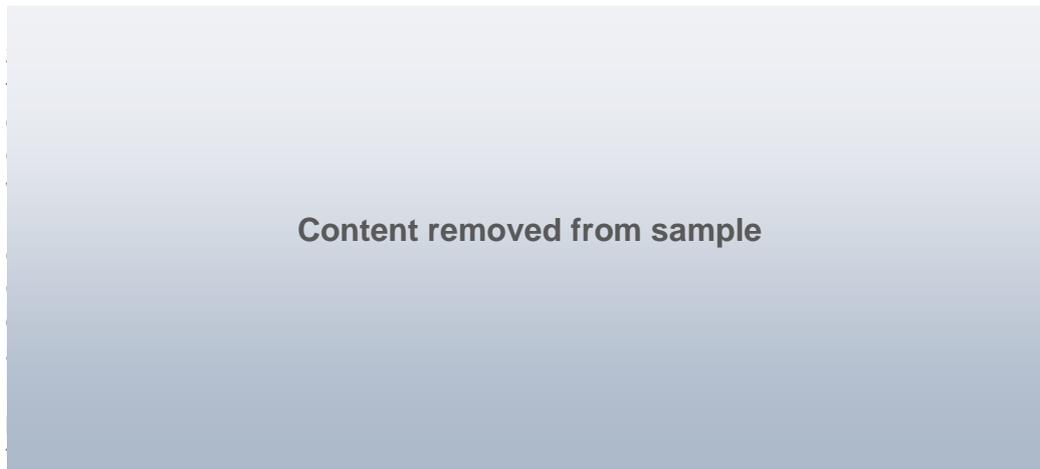
REFRIGERATION APPLIANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

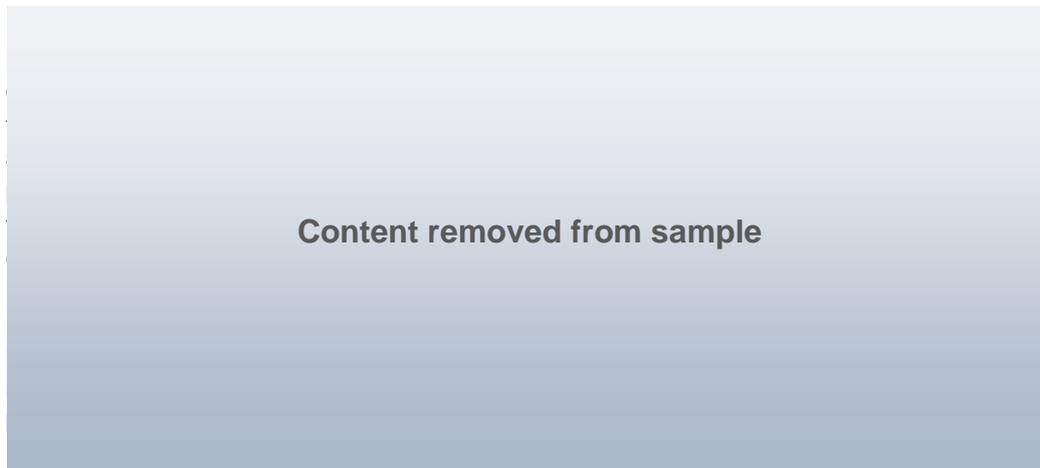


2023 DEVELOPMENTS

Inflationary pressures impact growth of the category



Rising preference for premium, larger capacity refrigeration appliances



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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

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

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CATEGORY DATA

Table 1 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 2 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 3 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 4 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 5 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 6 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)						

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 7 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 8 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 9 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 10 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 11 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 12 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 13 Distribution of Refrigeration 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 14 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 15 Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028

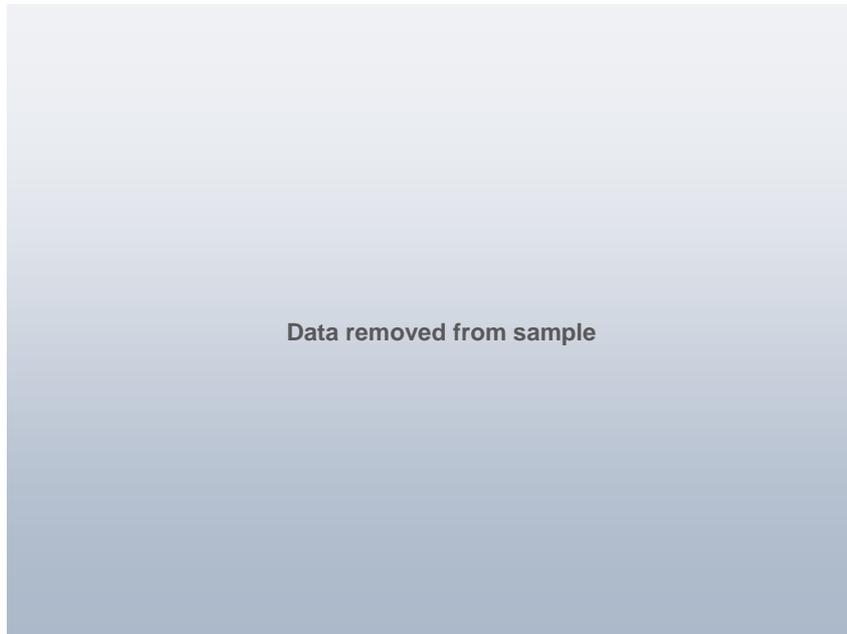
'000 units	2023	2024	2025	2026	2027	2028
Refrigeration Appliances	Data removed from sample					
- Built-in Refrigeration Appliances						
- Freestanding Refrigeration Appliances						
- Electric Wine Coolers/ Chillers						
-- Built-in Electric Wine Coolers/Chillers						
-- Freestanding Electric Wine 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 16 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



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

Table 17 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			



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

Table 18 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



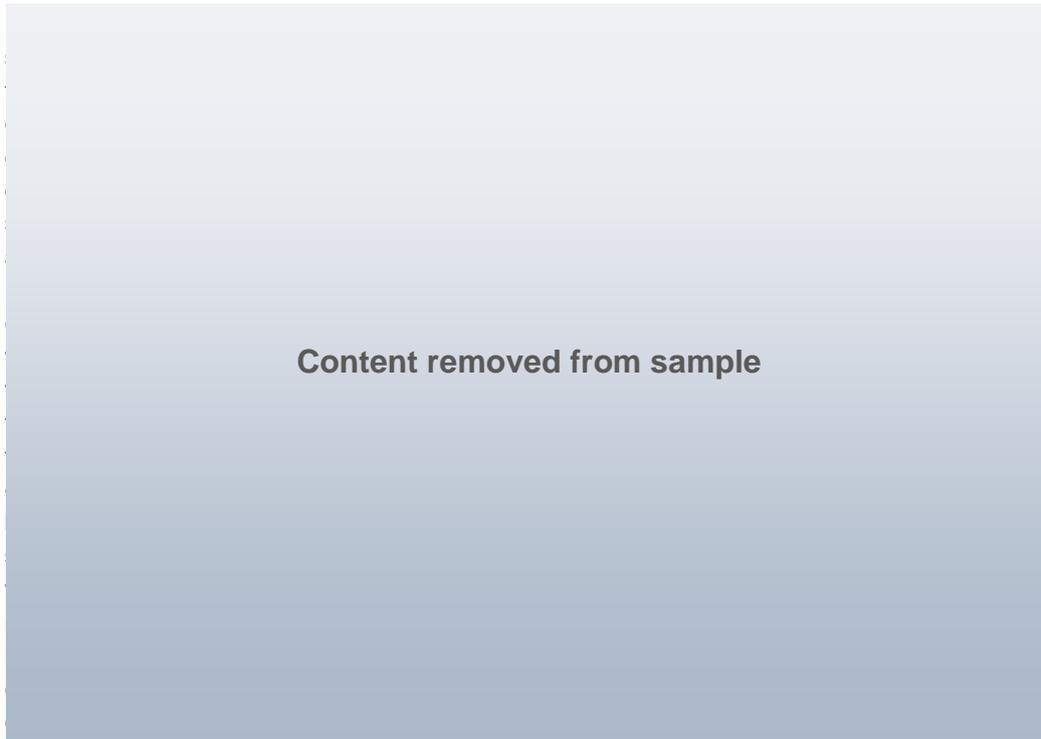
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CONSUMER APPLIANCES IN INDIA - INDUSTRY OVERVIEW

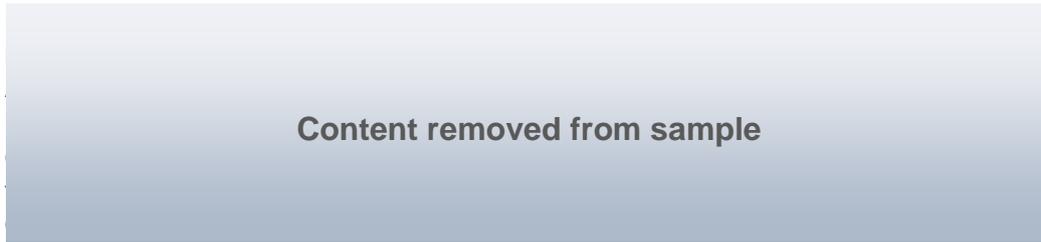
EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture

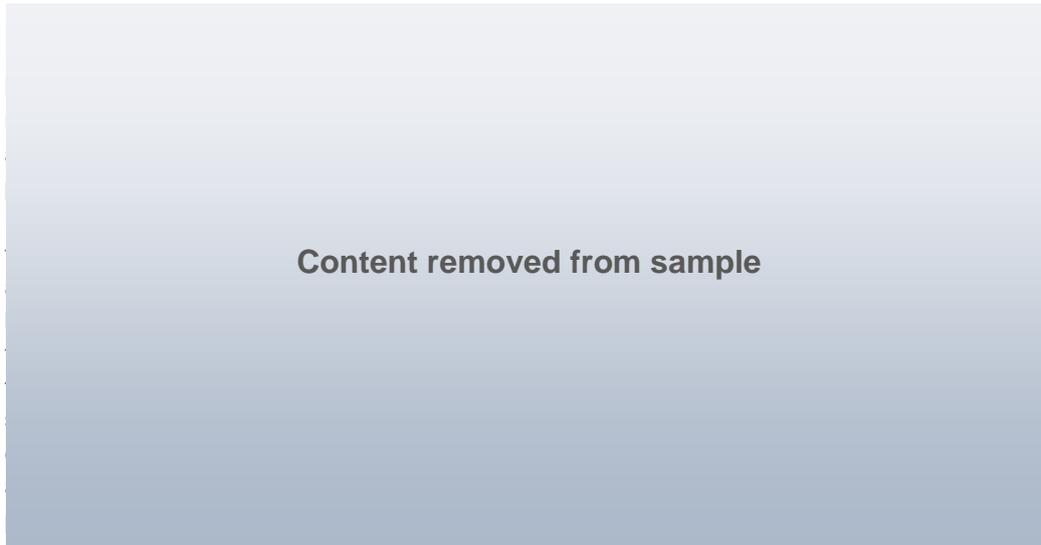


2023 key trends

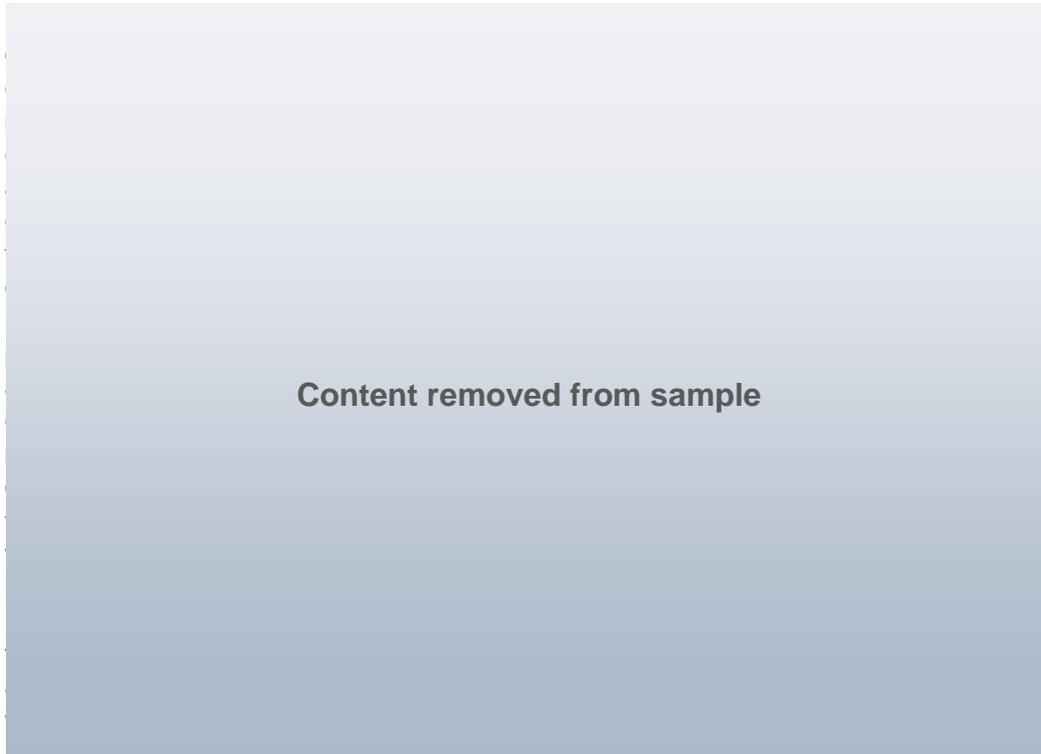




Competitive landscape



Retailing developments



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What next for consumer appliances?

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MARKET INDICATORS

Table 19 Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024

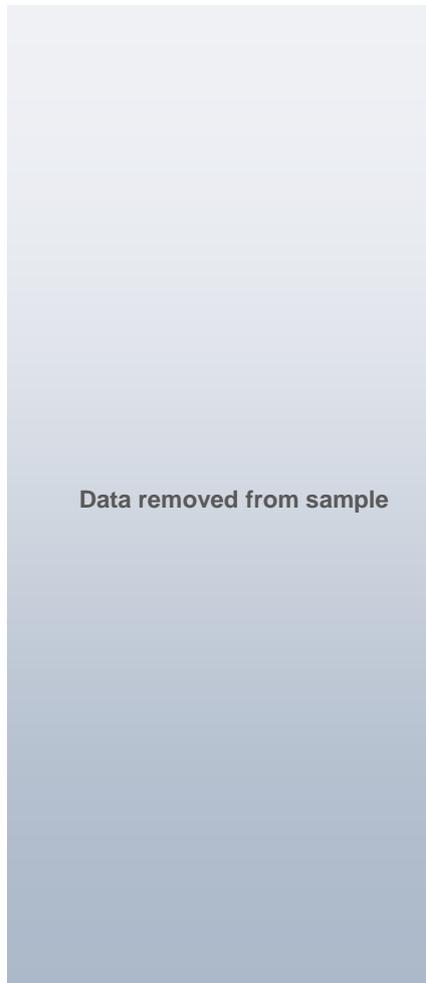
% households	2018	2019	2020	2021	2022	2023
Dishwashers	Data removed from sample					
Automatic Dryers						
Automatic Washer Dryers						
Automatic Washing Machines						
Semi-Automatic Washing Machines						
Built-in Hobs						
Ovens						
Cooker Hoods						
Cookers						
Range Cookers						
Microwaves						
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

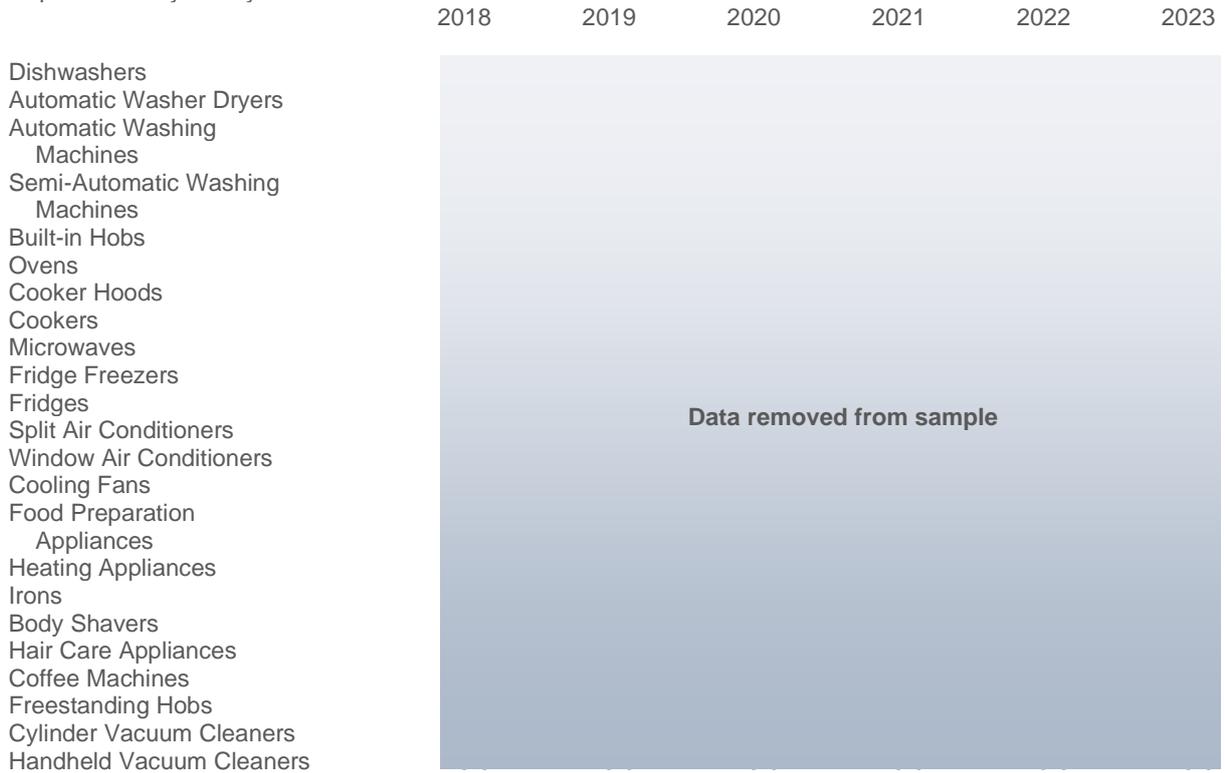
Dishwashers
 Automatic Dryers
 Automatic Washer Dryers
 Automatic Washing Machines
 Semi-Automatic Washing Machines
 Built-in Hobs
 Ovens
 Cooker Hoods
 Cookers
 Range Cookers
 Microwaves
 Electric Wine Coolers/ Chillers
 Freezers
 Fridge Freezers
 Fridges
 Portable Room Air Conditioners
 Split Air Conditioners
 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 20 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 21 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 22 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 23 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 24 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 25 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

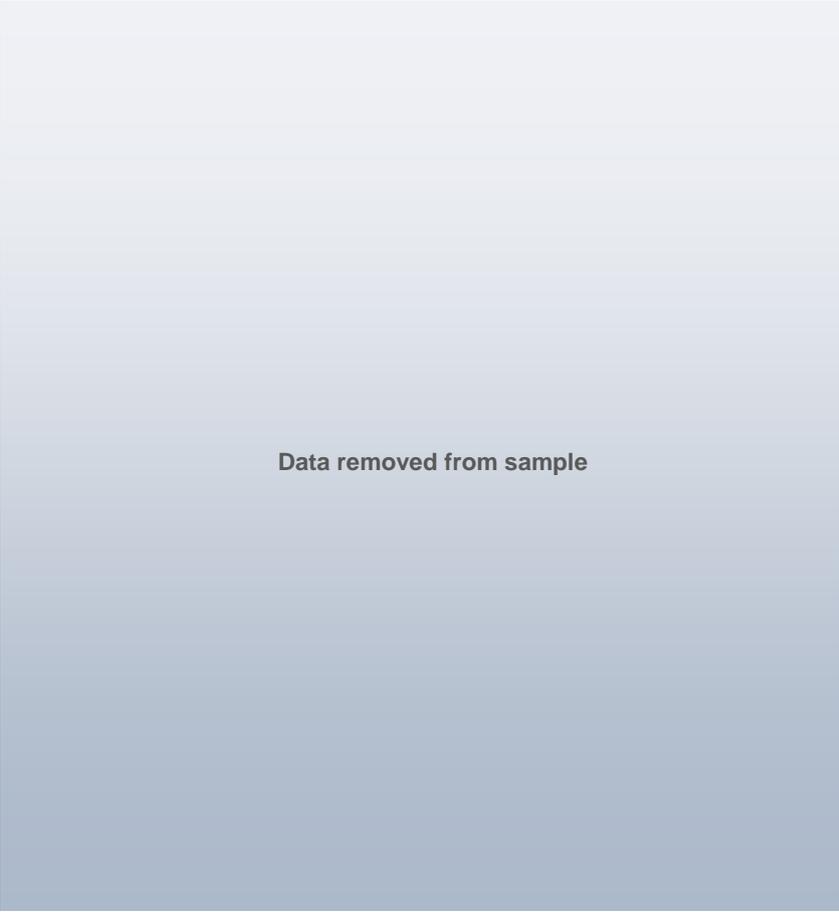


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 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



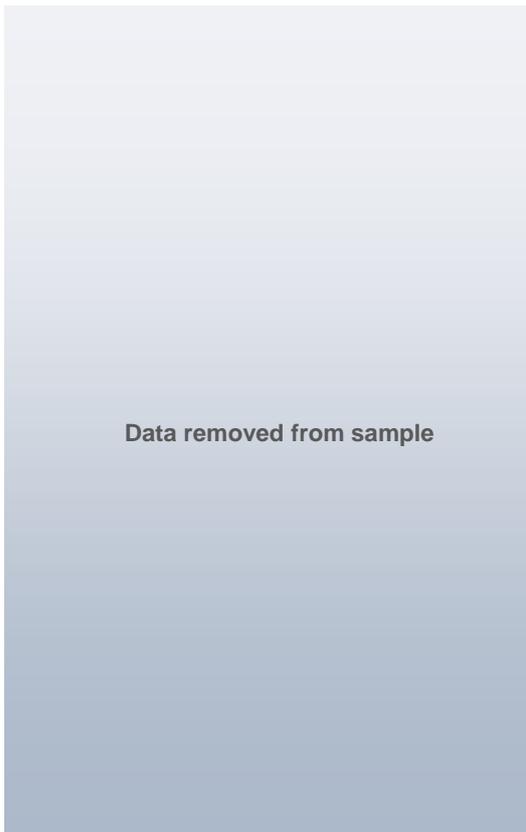
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 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



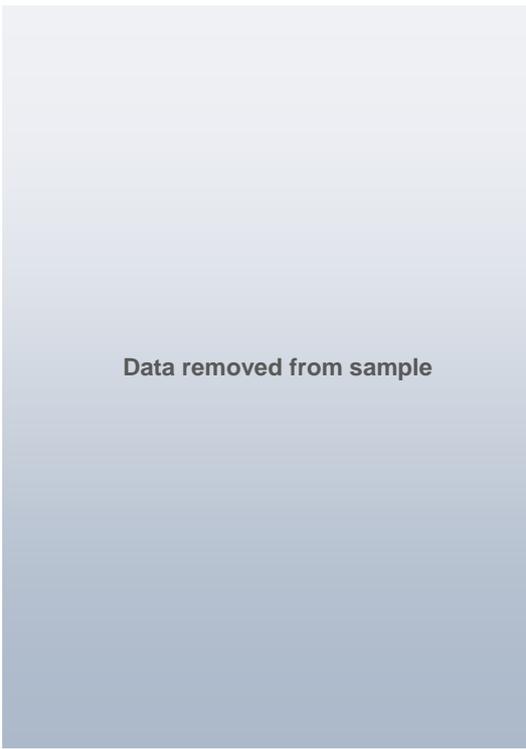
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 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 29 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 30 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 31 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 32 Sales of Small Appliances by Category: % Value Growth 2018-2023

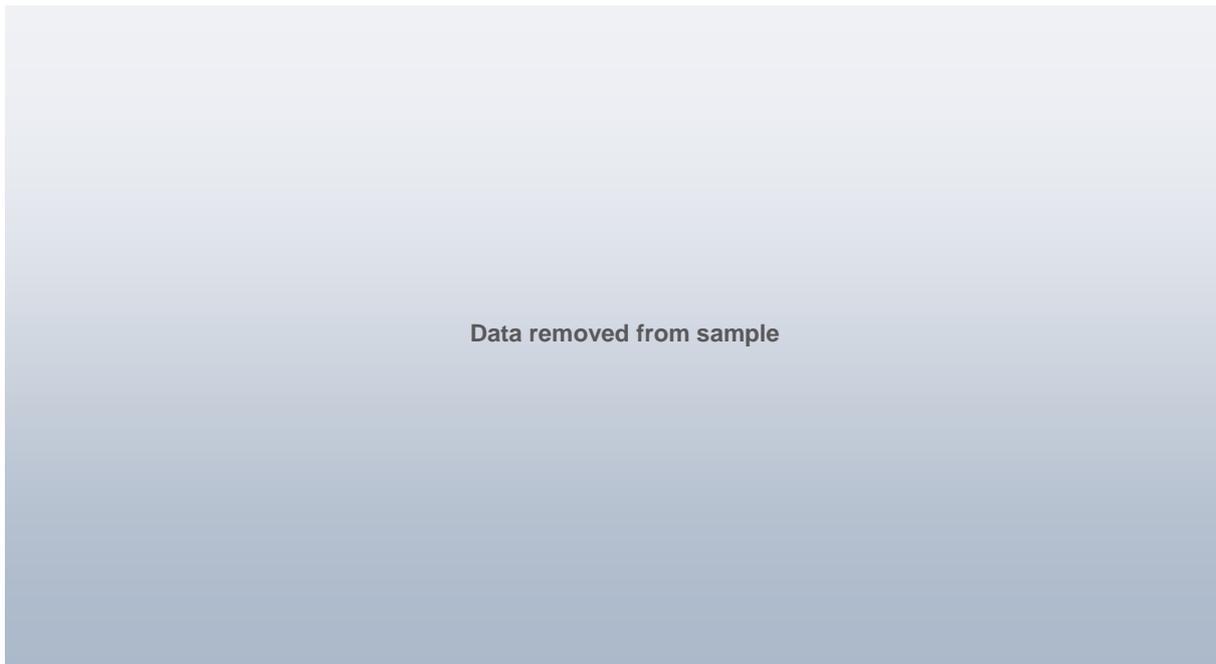
% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Small Appliances	Data removed from sample		
Air Treatment Products			
Food Preparation Appliances			
Heating Appliances			
Irons			
Personal Care Appliances			
Small Cooking Appliances			
Vacuum Cleaners			

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

Table 33 NBO Company Shares of Major Appliances: % Volume 2019-2023

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



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

Table 34 LBN Brand Shares of Major Appliances: % Volume 2020-2023

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

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

Table 35 NBO Company Shares of Small 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 36 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 37 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						

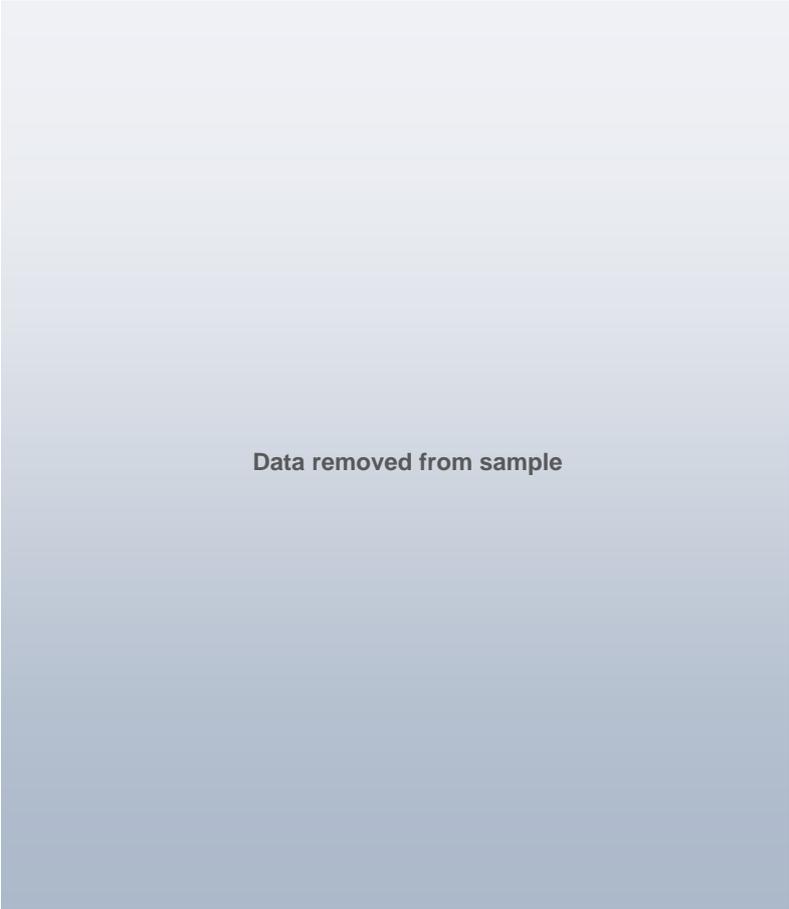
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

Table 38 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 39 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 40 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 41 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 42 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

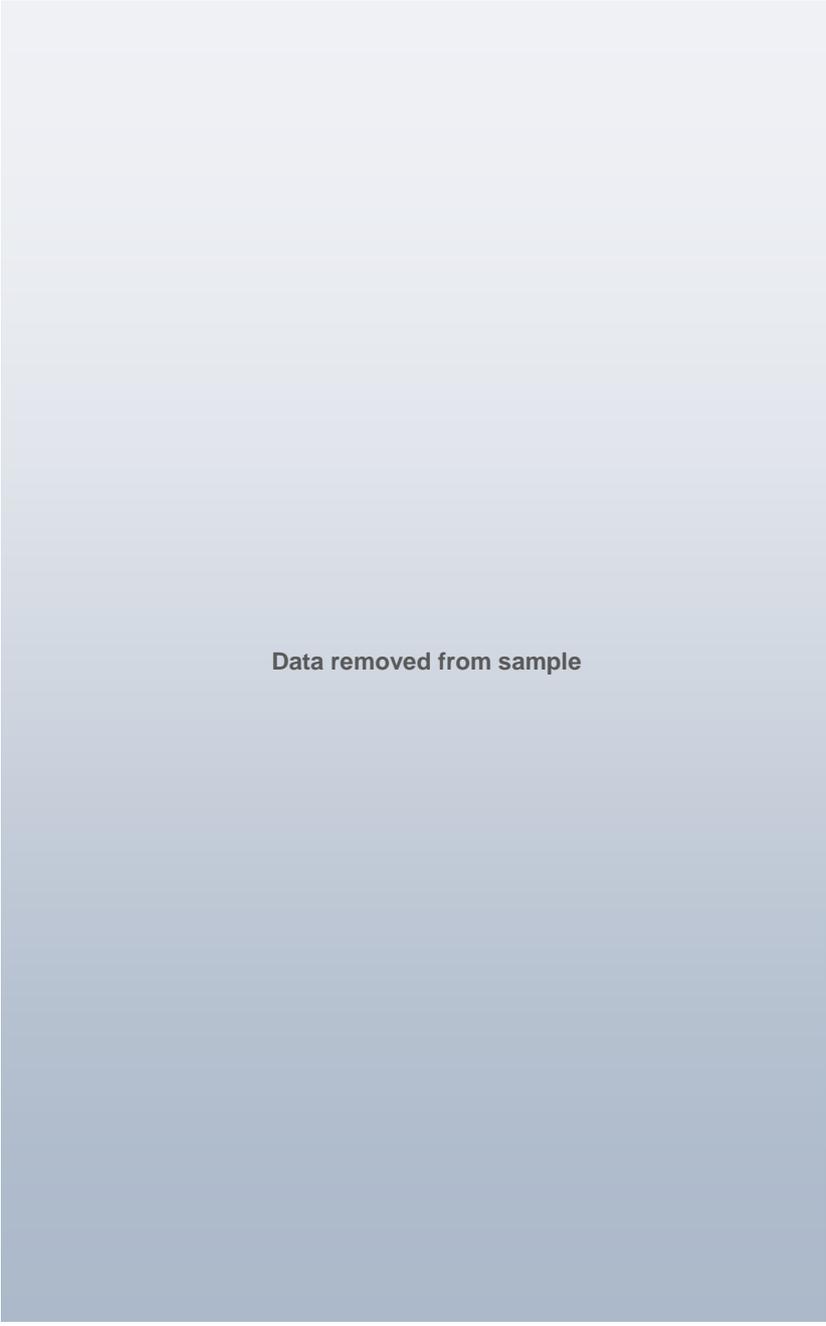
% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Consumer Appliances	Data removed from sample		
Major Appliances			
Small Appliances			

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

Table 43 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

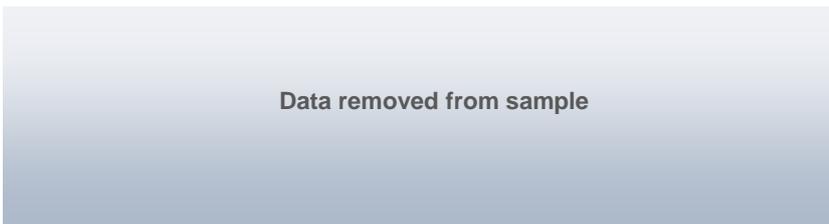
Table 44 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Major Appliances	Data removed from sample					
Built-In Major Appliances	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



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

Table 45 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 46 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 47 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 48 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 49 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 50 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

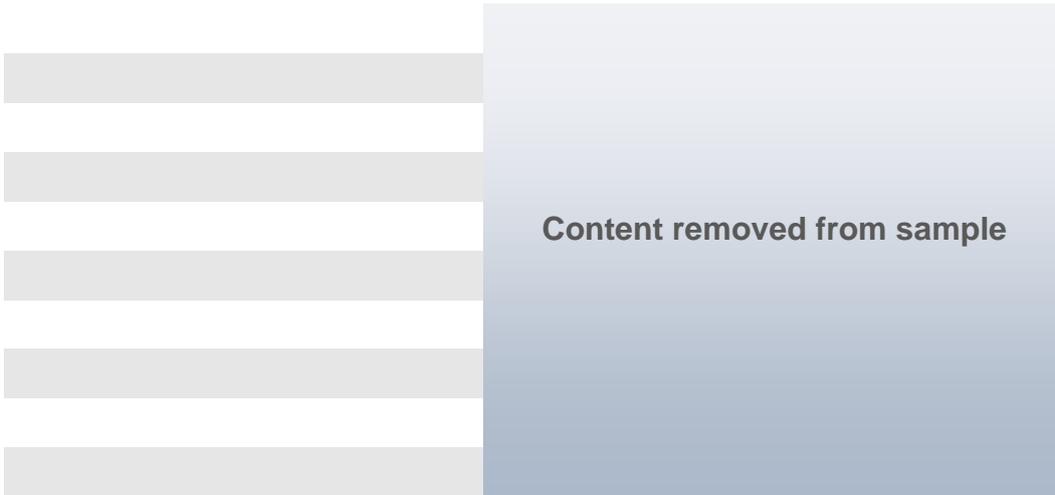
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on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