

World Major Household Appliances

Industry Study with Forecasts for 2019 & 2024

Study #3366 | February 2016 | \$6500



Global demand for major household appliances is forecast to increase at a 3.0 percent yearly rate through 2019 to 445 million units. The number of appliances in use will climb to 4.9 billion units. The average number of appliances in each household will increase, supported by rising personal income levels in developing areas. In addition, new household formation activity will provide new sales opportunities for appliance suppliers as the world's population continues to grow.

Developing countries to lead gains

In general, developing countries will post the fastest increases in major household appliance demand through 2019. The installed base in developing nations is low, as below average income levels have prohibited widespread purchases of large durable goods such as major appliances. However, rising income levels will lead to the creation or expansion of the middle class population in a number of countries, boosting first-time appliance purchases. In addition, major appliance producers offer basic, lower-value appliances in these nations to help boost sales. Demand gains in developed countries will be more modest, with the majority of sales stemming from replacement purchases. Additionally, population and household growth will be slower in the developed world, limiting new housing-related sales opportunities.

China will remain the leading purchaser and producer of major household appliances in 2019. The country is home to the world's largest population and housing industry, resulting in a substantial domestic market for major appliances. In addition, China has a large low-cost labor pool that many multinational appliance firms have utilized

in their production operations. However, India and Indonesia will record the fastest increases in demand of the major national markets, fueled by rapid economic growth.

Freezers to be fastest growing type

Refrigerators and large cooking appliances are typically the first appliances purchased once personal income levels reach a sufficient level, followed by washing machines. Because of the relatively large numbers of these products already in use, market advances through 2019 will not be as strong as those expected for freezers, dishwashers, and clothes dryers. Freezers will register the fastest sales gains of any major appliance type. Demand for freezers will be boosted in low and middle income countries where usage levels are extremely low by a growing need for additional freezer space as per capita incomes and food spending rise. The comparatively low cost of separate freezers will drive gains as well. On the other hand, use of separate freezers is becoming less popular in many developed countries, which will prevent overall demand from growing at an even faster pace.

Study coverage

This study analyzes the 385 million unit world major household appliance industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product for six world regions and 25 major countries. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 32 industry players, including Whirlpool, Electrolux, and BSH Hausgeräte.

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FRANCE: CLOTHES WASHER & DRYER SUPPLY & DEMAND
(thousand units)

Item	2005	2010	2015	2020	2025
Households (million)					
washers in use/household					
dryers in use/household					
Clothes Washers & Dryers in Use (mil)					
Washers					
Dryers					
demand/000 washers & dryers in use					
Clothes Washer & Dryer Demand					
Washers					
Dryers					
net exports					
Clothes Washer & Dryer Shipments					
Washers					
Dryers					

Source: The Freedonia Group

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INDIA: DISHWASHER SUPPLY & DEMAND
(thousand units)

Item	2010	2015	2020	2025	2035
Households (million)					
dishwashers in use/household					
Dishwashers in Use (mil)					
demand/000 dishwashers in use					
Dishwasher Demand					
net exports					
Dishwasher Shipments					

Source: The Freedonia Group

OTHER REGIONS

Argentina: Supply & Demand -- Demand for major household appliances in Argentina was 3.2 million units in 2014, while total installed base of these appliances was 37 million. Argentina similar market for major household appliances to Brazil, although penetration rate of washers in Argentina is higher. However, Argentina a considerably smaller market for major household appliances in terms than Brazil due to its smaller population base and housing infrastructure. Growth in major household appliance demand during the 2009-2014 period was the slowest in the region. Import restrictions imposed in 2011 and 2014 adversely affected sales to some extent as they created supply constraints.

Demand for major household appliances in Argentina is projected to increase to 4.5 million units, accelerating to 6.5 million units by 2025. Demand will be aided by the expected acceleration in sales in the replacement purchases that were postponed during the economic downturn.

Shipments of major household appliances from facilities located in Argentina to other parts of the country is a considerable portion of the total demand. Argentina is a considerable importer of major household appliances, resulting in a trade deficit that was equivalent to 19 percent of demand in 2014. However, the country is also a sizable producer of these products, with nearly all of the locally produced appliances being sold locally.

Major household appliance production at sites in Argentina is forecast to post nominal annual gains through 2019. Although local manufacturing in Argentina will continue to face heavy competition from imported products, domestic output will be supported by the expected

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

World Consumer Air Treatment Systems

Global demand for consumer air treatment systems will grow 10.4 percent annually to \$10.2 billion in 2019. Gains will be driven by rising awareness of indoor and outdoor air pollution, and its effect on health. The countries expected to see the fastest growth are India, China, Mexico, and Brazil. This study analyzes the \$6.2 billion global market for consumer air treatment systems, with forecasts for 2019 and 2024 by product and technology for six world regions and 15 major countries. The study also evaluates company market share and profiles industry players.
#3370..... March 2016..... \$6400

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will rise 3.2 percent annually to \$11.7 billion in 2019. Turf and grounds equipment and hedge trimmers will be the fastest growing products, while lawnmowers remain the largest segment. Growth in the commercial market will continue to outpace the dominant residential segment. This study analyzes the \$10 billion US power lawn and garden equipment industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry competitors.
#3340..... December 2015..... \$5300

Outdoor Furniture & Grills

US demand for outdoor furniture, heaters, cooking appliances, and accessories is forecast to rise 3.7 percent annually to \$9.1 billion in 2019. Trends toward at-home *al fresco* entertainment and "staycations" will support gains. Outdoor furniture and accessories will remain dominant, while patio heating products will grow the fastest from a small base. This study analyzes the \$7.6 billion US outdoor furniture and grill industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry players.
#3344..... October 2015..... \$5300

Home Organization Products

Demand for home organization products in the US is forecast to increase 3.5 percent per year through 2019 to \$10.5 billion. Bins, baskets and totes will remain the largest product segment, while modular units will grow the fastest. Garages will be the fastest growing room in which organization products are used. This study analyzes the \$8.8 billion US home organization product industry, with forecasts for 2019 and 2024 by material, product, room and market. The study also evaluates company market share, and profiles industry competitors.
#3254..... May 2015..... \$5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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