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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OTHER REGIONS

Argentina: Supply & Demand -- Demand for major household appliances in Argentina was 3.2 million units in 2014, while the total installed base of these appliances was 37 million. Argentina has a similar market for major household appliances to Brazil, although the penetration rate of washers in Argentina is higher. However, Argentina is a considerably smaller market for major household appliances in terms of volume than Brazil due to its smaller population base and housing industry. Growth in major household appliance demand during the 2009-2014 period was the slowest in the region. Import restrictions imposed in 2012 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 3.6 million units, accelerating from sluggish gains. It will be aided by an expected acceleration in sales in the short term as replacement purchases will continue to be stimulated by the difficulties in the domestic appliance market.

Shipments of major household appliances from facilities located in Argentina were 2.5 million units in 2014. 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

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

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| TABLE V-13 |
| FRANCE: CLOTHES WASHER & DRYER SUPPLY & DEMAND (thousand units) |

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<th>Item</th>
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<th>2015</th>
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<td>dryers in use/household</td>
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<td>Dryers</td>
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<td>Dryers</td>
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Source: The Freedonia Group

| TABLE VI-15 |
| INDIA: DISHWASHER SUPPLY & DEMAND (thousand units) |

<table>
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<th>Item</th>
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<td>demand/000 dishwashers in use</td>
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<td>Dishwasher Demand</td>
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<td>net exports</td>
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<td>Dishwasher Shipments</td>
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Source: The Freedonia Group
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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- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics & Other Polymers
- Security
- Services
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