

# Consumer Appliances in Indonesia

December 2023

Table of Contents

## Consumer Appliances in Indonesia

#### **EXECUTIVE SUMMARY**

Consumer appliances in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer appliances?

## MARKET INDICATORS

- Table 1 Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024
- Table 2 Replacement Cycles of Consumer Appliances by Category 2018-2024

#### MARKET DATA

- Table 3 Sales of Consumer Appliances by Category: Volume 2018-2023
- Table 4 Sales of Consumer Appliances by Category: Value 2018-2023
- Table 5 Sales of Consumer Appliances by Category: % Volume Growth 2018-2023
- Table 6 Sales of Consumer Appliances by Category: % Value Growth 2018-2023
- Table 7 Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023
- Table 8 Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023
- Table 9 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023
- Table 10 Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023
- Table 11 Sales of Small Appliances by Category: Volume 2018-2023
- Table 12 Sales of Small Appliances by Category: Value 2018-2023
- Table 13 Sales of Small Appliances by Category: % Volume Growth 2018-2023
- Table 14 Sales of Small Appliances by Category: % Value Growth 2018-2023
- Table 15 NBO Company Shares of Major Appliances: % Volume 2019-2023
- Table 16 LBN Brand Shares of Major Appliances: % Volume 2020-2023
- Table 17 NBO Company Shares of Small Appliances: % Volume 2019-2023
- Table 18 LBN Brand Shares of Small Appliances: % Volume 2020-2023
- Table 19 Distribution of Major Appliances by Format: % Volume 2018-2023
- Table 20 Distribution of Small Appliances by Format: % Volume 2018-2023
- Table 21 Forecast Sales of Consumer Appliances by Category: Volume 2023-2028
- Table 22 Forecast Sales of Consumer Appliances by Category: Value 2023-2028
- Table 23 Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028
- Table 24 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028
- Table 25 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028
- Table 26 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028
- Table 27 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028
- Table 28 Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028
- Table 29 Forecast Sales of Small Appliances by Category: Volume 2023-2028
- Table 30 Forecast Sales of Small Appliances by Category: Value 2023-2028
- Table 31 Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028
- Table 32 Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

# DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## Dishwashers in Indonesia

## KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Dishwashers benefit from release of affordable models and the modernisation of consumer lifestyles

Environmental and hygiene benefits provide a boost to sales

Wider availability via e-commerce generates greater interest in dishwasher ownership

#### PROSPECTS AND OPPORTUNITIES

Expanding middle-class will seek out greater dishwashing convenience

Budget-friendly brands could gain traction

Education will be key to attracting a wider range of customers

## **CATEGORY DATA**

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

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

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

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

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

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

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

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

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

Table 42 - Production of Dishwashers: Total Volume 2018-2023

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

Table 44 - Forecast Sales of Dishwashers by Category: Value 2023-2028

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

Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

# Home Laundry Appliances in Indonesia

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Strong growth in 2023, although demand remains limited by prevalence of hand washing and laundry services

Time-saving features and convenience drive growth in automatic washing machines

Leader Sharp faces tougher competition

## PROSPECTS AND OPPORTUNITIES

Robust growth for automatic washing machines amid greater demand for convenience

Automatic washing machines will see strongest performance, with smart appliances expected to capture the attention of higher income consumers Sustainability will become a more important factor in the consumer decision-making process

## **CATEGORY DATA**

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

Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023

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

Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023

Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023

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

Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023

Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023

Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023

Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023

Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023

Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023

- Table 59 Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028
- Table 60 Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028
- Table 61 Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028
- Table 62 Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

## Large Cooking Appliances in Indonesia

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Large cooking appliances see uptick in demand, backed by better economic conditions
Built in hobs deliver positive results, while cooker hoods see limited demand
Modena Indonesia extends its lead

#### PROSPECTS AND OPPORTUNITIES

Positive outlook for large cooking appliances thanks to trend towards urbanisation and growing demand for space-saving solutions Manufacturers will cater to the needs of various consumer segments with differentiated prices and features Competition is expected to intensify, as more Chinese players enter the market

#### **CATEGORY DATA**

- Table 63 Sales of Large Cooking Appliances by Category: Volume 2018-2023
- Table 64 Sales of Large Cooking Appliances by Category: Value 2018-2023
- Table 65 Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023
- Table 66 Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023
- Table 67 Sales of Built-in Hobs by Format: % Volume 2018-2023
- Table 68 Sales of Ovens by Smart Appliances: % Volume 2019-2023
- Table 69 NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023
- Table 70 LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023
- Table 71 NBO Company Shares of Built-in Hobs: % Volume 2019-2023
- Table 72 NBO Company Shares of Ovens: % Volume 2019-2023
- Table 73 NBO Company Shares of Cooker Hoods: % Volume 2019-2023
- Table 74 NBO Company Shares of Built-in Cooker Hoods: % Volume 2019-2023
- Table 75 NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023
- Table 76 NBO Company Shares of Cookers: % Volume 2019-2023
- Table 77 Distribution of Large Cooking Appliances by Format: % Volume 2018-2023
- Table 78 Production of Large Cooking Appliances: Total Volume 2018-2023
- Table 79 Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028
- Table 80 Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028
- Table 81 Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028
- Table 82 Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

## Microwaves in Indonesia

# KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Urbanization and modern lifestyles drive demand for microwaves

Cultural preferences and power limitations present challenges to development of microwaves

Sharp maintains its leading position by offering diverse range of models catering to different consumer budgets

# PROSPECTS AND OPPORTUNITIES

Urbanisation will be key growth driver, alongside manufacturer investment in new product innovation

Affordability will be key as competition increases Smart microwaves to gain popularity

#### CATEGORY DATA

- Table 83 Sales of Microwaves by Category: Volume 2018-2023
- Table 84 Sales of Microwaves by Category: Value 2018-2023
- Table 85 Sales of Microwaves by Category: % Volume Growth 2018-2023
- Table 86 Sales of Microwaves by Category: % Value Growth 2018-2023
- Table 87 Sales of Microwaves by Smart Appliances: % Volume 2019-2023
- Table 88 NBO Company Shares of Microwaves: % Volume 2019-2023
- Table 89 LBN Brand Shares of Microwaves: % Volume 2020-2023
- Table 90 Distribution of Microwaves by Format: % Volume 2018-2023
- Table 91 Production of Microwaves: Total Volume 2018-2023
- Table 92 Forecast Sales of Microwaves by Category: Volume 2023-2028
- Table 93 Forecast Sales of Microwaves by Category: Value 2023-2028
- Table 94 Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028
- Table 95 Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

## Refrigeration Appliances in Indonesia

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Premiumisation drives growth in 2023.

Demand for larger units is increasing.

Sharp retains its leading position, despite continuous investment in innovative technologies by its competitors

#### PROSPECTS AND OPPORTUNITIES

Demand is expected to grow in upcoming years, fuelled by rising urbanisation

Smart technology and energy efficiency will be key factors driving purchasing decisions

Growing popularity of compact, space-saving designs

#### **CATEGORY DATA**

- Table 96 Sales of Refrigeration Appliances by Category: Volume 2018-2023
- Table 97 Sales of Refrigeration Appliances by Category: Value 2018-2023
- Table 98 Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023
- Table 99 Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023
- Table 100 Sales of Freezers by Format: % Volume 2018-2023
- Table 101 Sales of Freezers by Volume Capacity: % Volume 2018-2023
- Table 102 Sales of Fridge Freezers by Format: % Volume 2018-2023
- Table 103 Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023
- Table 104 Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023
- Table 105 Sales of Fridges by Volume Capacity: % Volume 2018-2023
- Table 106 NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023
- Table 107 LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023
- Table 108 NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023
- Table 109 NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023
- Table 110 NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
- Table 111 Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
- Table 112 Production of Refrigeration Appliances: Total Volume 2018-2023
- Table 113 Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
- Table 114 Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
- Table 115 Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
- Table 116 Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

#### Air Treatment Products in Indonesia

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Indonesia's tropical climate ensures high demand for air treatment products

Air purifiers see modest increase demand as fears over the pandemic subside

Sharp retains its lead amid intense competition from other brands

#### PROSPECTS AND OPPORTUNITIES

Strong performance for air conditioners

Health concerns will boost sales of air purifiers

Inverter air conditioners will offer energy saving benefits

## **CATEGORY DATA**

- Table 117 Sales of Air Treatment Products by Category: Volume 2018-2023
- Table 118 Sales of Air Treatment Products by Category: Value 2018-2023
- Table 119 Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
- Table 120 Sales of Air Treatment Products by Category: % Value Growth 2018-2023
- Table 121 Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023
- Table 122 NBO Company Shares of Air Treatment Products: % Volume 2019-2023
- Table 123 LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
- Table 124 Distribution of Air Treatment Products by Format: % Volume 2018-2023
- Table 125 Production of Air Conditioners: Total Volume 2018-2023
- Table 126 Forecast Sales of Air Treatment Products by Category: Volume 2023-2028
- Table 127 Forecast Sales of Air Treatment Products by Category: Value 2023-2028
- Table 128 Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028
- Table 129 Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

## Food Preparation Appliances in Indonesia

# KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Food preparation appliances benefit from need for greater convenience Healthy eating trend drives demand for juice extractors.

Phillips maintains its dominance

# PROSPECTS AND OPPORTUNITIES

Trend towards modern lifestyles and growing focus on healthier living will be significant factors contributing to growth Offering lower prices and embracing e-commerce will attract more customers

Local brands will remain successful, due to their attractive quality-price ratio

## CATEGORY DATA

- Table 130 Sales of Food Preparation Appliances by Category: Volume 2018-2023
- Table 131 Sales of Food Preparation Appliances by Category: Value 2018-2023
- Table 132 Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023
- Table 133 Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023
- Table 134 NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023
- Table 135 LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023
- Table 136 Distribution of Food Preparation Appliances by Format: % Volume 2018-2023
- Table 137 Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028
- Table 138 Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028
- Table 139 Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028
- Table 140 Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

## Personal Care Appliances in Indonesia

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Significant growth for personal care appliances, as Indonesians pay more attention to their appearance Hair care appliances register a dynamic performance

Philips retains its dominance, despite aggressive competition from rival brands

## PROSPECTS AND OPPORTUNITIES

Personal care is poised for a bright future, as social media and Korean culture exert a significant influence E-commerce is set to transform the competitive landscape for personal care appliances Building consumers' awareness of the benefits of personal care products will drive future growth

#### **CATEGORY DATA**

- Table 141 Sales of Personal Care Appliances by Category: Volume 2018-2023
- Table 142 Sales of Personal Care Appliances by Category: Value 2018-2023
- Table 143 Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
- Table 144 Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
- Table 145 Sales of Body Shavers by Format: % Volume 2018-2023
- Table 146 Sales of Hair Care Appliances by Format: % Volume 2018-2023
- Table 147 NBO Company Shares of Personal Care Appliances 2019-2023
- Table 148 LBN Brand Shares of Personal Care Appliances 2020-2023
- Table 149 Distribution of Personal Care Appliances by Format: % Volume 2018-2023
- Table 150 Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
- Table 151 Forecast Sales of Personal Care Appliances by Category: Value 2023-2028
- Table 152 Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028
- Table 153 Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

## Small Cooking Appliances in Indonesia

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Freestanding hobs and rice cookers continue to be essential fixtures in the typical Indonesian kitchen Light fryers gain traction, thanks to their growing affordability and reputed health benefits Affordable brands continue to hold sway

# PROSPECTS AND OPPORTUNITIES

Freestanding hobs and rice cookers will remain key components of the average Indonesian kitchen Energy-saving products will capture the attention of consumers

Smart technology will take centre stage

# **CATEGORY DATA**

- Table 154 Sales of Small Cooking Appliances by Category: Volume 2018-2023
- Table 155 Sales of Small Cooking Appliances by Category: Value 2018-2023
- Table 156 Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023
- Table 157 Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023
- Table 158 Sales of Freestanding Hobs by Format: % Volume 2018-2023
- Table 159 NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023
- Table 160 LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023
- Table 161 Distribution of Small Cooking Appliances by Format: % Volume 2018-2023
- Table 162 Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028
- Table 163 Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

Table 164 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028

Table 165 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

#### Vacuum Cleaners in Indonesia

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Vacuum cleaners gain favour with busy urban consumers

Stick vacuum cleaners continue to gain traction

Electrolux retains its lead in midst of increasingly fierce competition

#### PROSPECTS AND OPPORTUNITIES

Trend towards smaller living space will offer scope for further growth

E-commerce will play key role in boosting sales

Robotic revolution will gather pace

## **CATEGORY DATA**

Table 166 - Sales of Vacuum Cleaners by Category: Volume 2018-2023

Table 167 - Sales of Vacuum Cleaners by Category: Value 2018-2023

Table 168 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023

Table 169 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

Table 170 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023

Table 171 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

Table 172 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

Table 173 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

Table 174 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028

Table 175 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

Table 176 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028

Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2023-2028

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-appliances-in-indonesia/report.