

Where Consumers Shop for Consumer Appliances

July 2022

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Scope

Key findings

INDUSTRY SNAPSHOT

Consumer appliances sales growth recovered to pre-pandemic levels in 2021

Delayed consumer demand helping major appliances to recover

Positive historic trajectory but with some localised declines

CHANNEL SHIFTS

Non-store retailing continues on the path towards domination

Non-store retailing sees rapid growth across all regions

Pandemic speeds up the shift to online

STORE-BASED CHANNELS

Specialists retailers continue to dominate within store-based retailing

Variety stores in Latin America see the fastest recovery in 2021

Pandemic accelerates the shift from physical to online retail

Top five companies remain fairly stable, while others launch pandemic-inspired initiatives

Home and garden specialist retailers recover unevenly across different regions

Leading players stay dynamic with innovations to maintain consumers' interest

Private label expanding its product assortment as leading brands feel pressure

Economising consumers find appeal in private label appliances

NON-STORE CHANNELS

Chinese e-commerce platforms focusing on consumer appliances

E-commerce sales continue to see strong growth

Exceptionally strong growth for e-commerce across regions in 2020

Potential of e-commerce in small appliances remains significant

Amazon regains its leading position in 2020

NON-RETAIL CHANNELS

Construction channel showing resilience following 2020 lockdowns

FUTURE DEVELOPMENTS

Consumer appliances predicted to see moderate growth over the forecast period

Inflation to heavily impact path to consumer

Key takeaways

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