

Consumer Appliances in China

November 2023

Table of Contents

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dishwashers returns to growth as the country opens up
Siemens maintains its lead, but the competition is intense

PROSPECTS AND OPPORTUNITIES

Builder merchants and construction set to unlock further potential for built-in format
Format innovation backed by durability likely to drive growth

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home laundry appliances witnesses volume decline for two consecutive years
Automatic dryers remains resilient against market turbulence
Multi-brand strategy fuels success for Haier and Midea

PROSPECTS AND OPPORTUNITIES

Automatic washer dryers anticipated to return to stronger growth
Livestreaming e-commerce and the penetration of lower-tier cities key to growth
Auto-dosing has its doubters

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Large cooking appliances unable to halt its declining streak

Range cookers and ovens rebound

Robam and Fotile consolidate their leading positions as concentration increases

PROSPECTS AND OPPORTUNITIES

Recycling of old appliances offers new opportunities

Range cookers projected to return to stronger growth

Growth prospects for ovens limited by dietary habits

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 Range 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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Microwaves sees a further decline in sales

Midea and Galanz consolidate their dominance in microwaves

PROSPECTS AND OPPORTUNITIES

Quick recipe kits are paired with microwaves

Simplicity may be the new sexy for microwaves

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slow volume recovery for refrigeration appliances in 2023
 Freestanding fridge-freezers still the backbone of sales
 Haier drives dominance of domestic players in refrigeration appliances

PROSPECTS AND OPPORTUNITIES

Built-in models set to gain favour as they become even slimmer
 Compartmentalised storage central to large volume fridge-freezers
 Refrigerator as a hub for all kitchen appliances?

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 Built-in Fridges: % Volume 2019-2023
 Table 111 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
 Table 112 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
 Table 113 - Production of Refrigeration Appliances: Total Volume 2018-2023
 Table 114 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
 Table 115 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
 Table 116 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
 Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air treatment products returns to growth in 2023

Air conditioners posts strong growth as heatwaves hit China

Dynamism in air conditioners boosts most brands, but Gree and Midea continue to dominate

PROSPECTS AND OPPORTUNITIES

Smart control becoming essential for air conditioners

Aesthetic designs leading to a new fashion for high-end air conditioners

Humidifiers poised to return to growth in the forecast period

CATEGORY DATA

Table 118 - Sales of Air Treatment Products by Category: Volume 2018-2023

Table 119 - Sales of Air Treatment Products by Category: Value 2018-2023

Table 120 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023

Table 121 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023

Table 122 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023

Table 123 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023

Table 124 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023

Table 125 - Distribution of Air Treatment Products by Format: % Volume 2018-2023

Table 126 - Production of Air Conditioners: Total Volume 2018-2023

Table 127 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028

Table 128 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028

Table 129 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028

Table 130 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

Food Preparation Appliances in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume sales of food preparation appliances continue to decline in 2023

Rising competition to make the quietest products

PROSPECTS AND OPPORTUNITIES

Demand for food preparation appliances set to remain lower than pre-pandemic

Sales of multifunctional food preparation appliances expected to rise

CATEGORY DATA

Table 131 - Sales of Food Preparation Appliances by Category: Volume 2018-2023

Table 132 - Sales of Food Preparation Appliances by Category: Value 2018-2023

Table 133 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023

Table 134 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023

Table 135 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023

Table 136 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023

Table 137 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023

Table 138 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028

Table 139 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028

Table 140 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

Personal Care Appliances in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Personal care appliances shows the first signs of recovery in 2023

New products target segmented demand and different usages

Personal care appliances are becoming intelligent

PROSPECTS AND OPPORTUNITIES

Radiofrequency Beauty Device Registration Review Guidelines in 2024 set to standardise beauty devices

Emerging brands expected to see further growth

CATEGORY DATA

Table 142 - Sales of Personal Care Appliances by Category: Volume 2018-2023

Table 143 - Sales of Personal Care Appliances by Category: Value 2018-2023

Table 144 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023

Table 145 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023

Table 146 - Sales of Body Shavers by Format: % Volume 2018-2023

Table 147 - Sales of Hair Care Appliances by Format: % Volume 2018-2023

Table 148 - NBO Company Shares of Personal Care Appliances 2019-2023

Table 149 - LBN Brand Shares of Personal Care Appliances 2020-2023

Table 150 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023

Table 151 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028

Table 152 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028

Table 153 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

Table 154 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decline in volume sales of small cooking appliances extends into another year

Traditional and emerging categories experience sluggish growth for different reasons

Espresso coffee machines in the spotlight

PROSPECTS AND OPPORTUNITIES

Decline for small cooking appliances not over, as consumers focus on essentials

Electric steamers likely to witness growth

CATEGORY DATA

Table 155 - Sales of Small Cooking Appliances by Category: Volume 2018-2023

Table 156 - Sales of Small Cooking Appliances by Category: Value 2018-2023

Table 157 - Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023

Table 158 - Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023

Table 159 - Sales of Freestanding Hobs by Format: % Volume 2018-2023

Table 160 - NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023

Table 161 - LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023

Table 162 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023

Table 163 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

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

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

Vacuum Cleaners in China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vacuum cleaners returns to growth after a year of decline

Retail volume sales of robotic vacuum cleaners set to see a slight decline

Domestic brands outperform foreign brands

PROSPECTS AND OPPORTUNITIES

Mass products have potential for growth

Multifunctional products expected to rise, while cleaning efficacy should be strong

CATEGORY DATA

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

Table 168 - Sales of Vacuum Cleaners by Category: Value 2018-2023

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

Table 170 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

Table 171 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023

Table 172 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

Table 173 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

Table 174 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

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

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

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

Table 178 - 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-china/report.