

# **Consumer Appliances in Germany**

December 2023

**Table of Contents** 

## Consumer Appliances in Germany

## 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 Germany

KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Decline in upgrade purchases impacts sales of dishwashers Consumers tending to plan for the long term BSH strengthens its share in dishwashers

## PROSPECTS AND OPPORTUNITIES

Ground-breaking new features needed to persuade German consumers to upgrade their existing dishwashers Intelligent dishwashers on the rise E-commerce and omnichannel retailing still have lots of potential

## CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023Table 34 - Sales of Dishwashers by Category: Value 2018-2023Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023Table 38 - Sales of Dishwashers by Connected Appliances: % Volume 2019-2023Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023Table 40 - LBN Brand Shares of Dishwashers: % Volume 2018-2023Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023Table 42 - Production of Dishwashers: Total Volume 2018-2023Table 43 - Forecast Sales of Dishwashers by Category: Value 2023-2028Table 44 - Forecast Sales of Dishwashers by Category: % Volume Covert 2023-2028Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

## Home Laundry Appliances in Germany

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Uniform development across the categories High energy efficiency establishes itself as standard German models continue to lead home laundry appliances

## PROSPECTS AND OPPORTUNITIES

Slow recovery for the majority of categories From smart to intelligent devices Substitution effects across the categories

## 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 Connected 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 Connected Appliances: % Volume 2018-2023
Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023
Table 56 - LBN Brand Shares of Home Laundry Appliances by Format: % Volume 2018-2023
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 2023-2028Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

## Large Cooking Appliances in Germany

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Large cooking appliances continues to decline in 2023 Emphasis on intelligent and eco-friendly solutions Digital commerce evolution and changes to Germans' purchasing patterns

#### PROSPECTS AND OPPORTUNITIES

German focus on eco-friendly appliances Modular appliances in German urban settings The rise of IoT in German kitchens

## 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 Connected 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 - NBO Company Shares of Range Cookers: % Volume 2019-2023 Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2018-2023 Table 79 - Production of Large Cooking Appliances: Total Volume 2018-2023 Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028 Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028 Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028 Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

## Microwaves in Germany

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Integration of smart technologies Health-centric cooking capabilities Compact models in demand among Germany's urban residents

## PROSPECTS AND OPPORTUNITIES

Sustainable materials and eco-friendly features Integration of AI and personalised cooking programmes

## CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2018-2023Table 85 - Sales of Microwaves by Category: Value 2018-2023Table 86 - Sales of Microwaves by Category: % Volume Growth 2018-2023Table 87 - Sales of Microwaves by Category: % Value Growth 2018-2023Table 88 - Sales of Microwaves by Connected Appliances: % Volume 2019-2023Table 89 - NBO Company Shares of Microwaves: % Volume 2019-2023Table 90 - LBN Brand Shares of Microwaves: % Volume 2019-2023Table 91 - Distribution of Microwaves by Format: % Volume 2018-2023Table 92 - Production of Microwaves: Total Volume 2018-2023Table 93 - Forecast Sales of Microwaves by Category: Value 2023-2028Table 94 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028Table 95 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

## Refrigeration Appliances in Germany

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Consumers favouring longevity over frequent replacements Sustainability is being increasingly embraced Players highlighting their eco-centric advances

## PROSPECTS AND OPPORTUNITIES

All-in-one solutions The advance of "no frost" models Brands will need to try and integrate smart features with reliability and durability

## CATEGORY DATA

Table 97 - Sales of Refrigeration Appliances by Category: Volume 2018-2023 Table 98 - Sales of Refrigeration Appliances by Category: Value 2018-2023 Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023 Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023 Table 101 - Sales of Freezers by Format: % Volume 2018-2023 Table 102 - Sales of Freezers by Volume Capacity: % Volume 2018-2023 Table 103 - Sales of Fridge Freezers by Format: % Volume 2018-2023 Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023 Table 105 - Sales of Fridge Freezers by Connected Appliances: % Volume 2019-2023 Table 106 - Sales of Fridges by Volume Capacity: % Volume 2018-2023 Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023 Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023 Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023 Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023 Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2019-2023 Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023 Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023 Table 114 - Production of Refrigeration Appliances: Total Volume 2018-2023 Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028 Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028 Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028 Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

## Air Treatment Products in Germany

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Enhanced indoor air quality solutions Advanced integration in smart cooling technologies Straddling tradition and technological advancements

## PROSPECTS AND OPPORTUNITIES

Intuitive user-centric designs in air treatment Health and wellness integration in air treatment Enhanced portability and flexibility in air treatment solutions

#### CATEGORY DATA

Table 119 - Sales of Air Treatment Products by Category: Volume 2018-2023
Table 120 - Sales of Air Treatment Products by Category: Value 2018-2023
Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023
Table 123 - Sales of Air Conditioners by Connected Appliances: % Volume 2019-2023
Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023
Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
Table 126 - Distribution of Air Treatment Products by Format: % Volume 2018-2023
Table 127 - Production of Air Conditioners: Total Volume 2018-2023
Table 128 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: Wolume 2023-2028
Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028
Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

## Food Preparation Appliances in Germany

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Embracing culinary diversity through multifunctionality Smart integration and recipe assistance International landscape with a wide range of products

## PROSPECTS AND OPPORTUNITIES

Health-centric innovations as a key area Personalised user experiences Artisanal craftsmanship meets technology

#### CATEGORY DATA

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

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

## Personal Care Appliances in Germany

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Rise of hair care innovations Holistic oral care solutions Diverse offerings and brand alliances

## PROSPECTS AND OPPORTUNITIES

Multifunctionality, portability and seamless integration Al-driven personalisation and enhanced connectivity Integration of beauty and technology

## CATEGORY DATA

Table 143 - Sales of Personal Care Appliances by Category: Volume 2018-2023
Table 144 - Sales of Personal Care Appliances by Category: Value 2018-2023
Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
Table 147 - Sales of Body Shavers by Format: % Volume 2018-2023
Table 148 - Sales of Hair Care Appliances by Format: % Volume 2018-2023
Table 149 - NBO Company Shares of Personal Care Appliances 2019-2023
Table 150 - LBN Brand Shares of Personal Care Appliances by Format: % Volume 2018-2023
Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023
Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume 2023-2028
Table 155 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

## Small Cooking Appliances in Germany

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Health and wellness driving technology and sales Consumers looking for convenience and compactness Balancing tradition and innovation

## PROSPECTS AND OPPORTUNITIES

The rise of intelligent kitchens with connected appliances Embracing green initiatives in culinary technology The confluence of aesthetics, personalisation and market potential

## CATEGORY DATA

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

 Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023

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

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

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

Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

## Vacuum Cleaners in Germany

KEY DATA FINDINGS

## 2023 DEVELOPMENTS

The ascendancy of robotic and smart vacuum cleaners Emphasis on allergen filtration Balancing brand heritage and innovation

## PROSPECTS AND OPPORTUNITIES

Evolving consumer preferences The future of interconnected cleaning Customisability and advanced functionalities

## CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2018-2023Table 169 - Sales of Vacuum Cleaners by Category: Value 2018-2023Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023Table 172 - Sales of Robotic Vacuum Cleaners by Connected Appliances: % Volume 2019-2023Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Volume 2023-2028Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Volume 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-germany/report.