Euromonitor International

Vacuum Cleaners in China: Consumer Trends, Brand Strategies, and Innovation

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INTRODUCTION

Scope

The vacuum cleaner market is highly innovative and competitive

Amazon’s failed purchase of iRobot – why did Amazon want the Roomba vacuum cleaner?

Key takeaway: chinese brands are launching two new models a year; can the others keep up?

THE GLOBAL VACUUM CLEANER MARKET

Sales of robotic VCs are driving growth in the market

Six of the seven G7 countries are among the largest markets for VCs

Dyson leads the overall VC market, but is a laggard in robotic VCs

Feature-rich robotic VCs are driving unit price growth in the category

The wet and dry VC, taking VC innovation to the next level

CURRENT STATE OF PLAY

Chinese vacuum cleaner brands are bringing cutting-edge technology to consumers

Wet and dry vacuum cleaners underpins overall category growth in China

Questions we will be answering

Wet and dry vacuum cleaners lead to an uptick in upright VC model sales

Vacuum cleaner innovation leads to a demand and price spike in China

CONSUMER REQUIREMENTS

Consumers crave versatility, automation, and smart functionality in wet and dry products

Wet and dry vacuum cleaners’ major consumer groups

Automation, efficacy, and user-friendliness highly valued by different consumer groups

PRODUCT INNOVATION

Key product i nnovation themes in China

Efficacy: Innovating to achieve cleaning goals

Automation : Hassle-free cleaning

Versatility: one vacuum to rule them all

COMPETITIVE LANDSCAPE

Highly competitive and dynamic landscape, led by Chinese local brands

Clear value positioning p ivotal to attract right consumer groups and strategise

KEY BRAND PROFILE

Ecovacs: cross-category expansion through dual brands

Roborock: Product design excellence enables price leadership

Dreame: going international before the domestic market

Narwal: Disrupting the industry by catering to the “lazy economy”

LAST THOUGHTS ON THE CHINA MARKET

What’s next for vacuum cleaner innovation in China?

Vacuum cleaner brands showcased their technology leadership at Shanghai AWE 2024

CONCLUSION

The integration of the wet and dry feature will spur sales of upright and robotic VCs globally

What’s next for vacuum cleaner brands?

Key takeaway: chinese brands are launching two new models a year; can the others keep up?

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