



Consumer Appliances in the Philippines

January 2024

Table of Contents

Consumer Appliances in the Philippines

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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lower prices favour freestanding models

Wealthy aesthetes push the rebound in the demand for built-in models

Table-top consolidates presence as an affordable, convenience-based and space-saving format

PROSPECTS AND OPPORTUNITIES

Affordability remains the key to the wider household penetration of dishwashers

Higher consumer interest on hygiene and cleanliness

Greater education on the benefits of dishwashers to stimulate interest and purchases

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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Automatic models continue to gain favour as consumers search for higher convenience formats

Reopening of society provides work, school and social stimuli for purchases

Enhanced hygiene and sanitation and energy- and water-saving features

PROSPECTS AND OPPORTUNITIES

Convenience trend in washing machines to see fully automatic overtake semi-automatic in retail volume terms

Multifunctional, automated and energy-efficient laundry appliances to the fore

Domestic and Chinese brands set to disrupt the competitive landscape

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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Aesthetic and space concerns continue to favour built-in large cooking appliances

Subdued demand for more expensive types of large cooking appliances

Affordable options pique the interest of local consumers

PROSPECTS AND OPPORTUNITIES

Large cooking appliances to continue to feel the pressure from smaller appliances

Affordability to remain a key factor in the purchasing decisions of consumers

Consumers favour physical interaction and stores but retail e-commerce retains room for growth

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 Cookers: % 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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher retail volume growth in 2023 as hectic consumer lifestyles become the norm

Multifunction microwaves gain traction

High energy-efficiency and aesthetics push the development of microwaves

PROSPECTS AND OPPORTUNITIES

Sleek designs, smart models and all-in-one function with a focus on keeping food crispy and fresh to pique the interest of consumers

Basic function models to continue to meet the usage needs and budgets of Filipino households

Retail e-commerce has room to grow through pricing and convenience

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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Premium models and themed design kitchen trend
- Health and hygiene and energy remain key post-COVID-19 pandemic concerns
- Home-based food enterprises' larger capacity needs offer benefits for local brands

PROSPECTS AND OPPORTUNITIES

- Aspirational purchases to push sales
- TCL could disrupt the competitive landscape
- Companies to increase online brand engagement activities

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 Freestanding Fridge Freezers: % Volume 2019-2023
- Table 109 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
- Table 110 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
- Table 111 - Production of Refrigeration Appliances: Total Volume 2018-2023
- Table 112 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
- Table 113 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
- Table 114 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hot weather boosts retail volume sales in 2023

Energy-efficiency and design inform purchasing decisions and new product development

Innovation strategies continue to broaden to encompass silent and enhanced hygiene features

PROSPECTS AND OPPORTUNITIES

Strong retail volume growth performance projected for air treatment products

Clever and easy-to-install designs for air conditioners

Players need to focus on energy-efficiency in new product development and messaging

CATEGORY DATA

Table 116 - Sales of Air Treatment Products by Category: Volume 2018-2023

Table 117 - Sales of Air Treatment Products by Category: Value 2018-2023

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

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

Table 120 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023

Table 121 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023

Table 122 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023

Table 123 - Distribution of Air Treatment Products by Format: % Volume 2018-2023

Table 124 - Production of Air Conditioners: Total Volume 2018-2023

Table 125 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028

Table 126 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028

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

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

Food Preparation Appliances in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Drop in demand for blenders shapes overall performance

Many consumers are content with basic food preparation appliances

Food processors and slow juicers remain on upward demand trajectory

PROSPECTS AND OPPORTUNITIES

Health and wellness trend to spike sales of slow juicers

Heavy discounts, bundling, and free products to help stimulate demand

Online spaces to remain a focus for players

CATEGORY DATA

Table 129 - Sales of Food Preparation Appliances by Category: Volume 2018-2023

Table 130 - Sales of Food Preparation Appliances by Category: Value 2018-2023

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

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

Table 133 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023

Table 134 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023

Table 135 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023

Table 136 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028

Table 137 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028

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

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

Personal Care Appliances in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lower-priced brands and unbranded offers push demand in a tough economic climate, but there is room for innovation and upgrades
Rising use of grooming products as consumers resume out-of-home lifestyles
The electric format continues to gain traction in toothbrush units

PROSPECTS AND OPPORTUNITIES

Affordability remains a watchword but premiumisation is anticipated
Increasing education on hygiene and personal grooming to spur the demand for personal care appliances
Retail e-commerce to gain traction as a go-to channel

CATEGORY DATA

Table 140 - Sales of Personal Care Appliances by Category: Volume 2018-2023
Table 141 - Sales of Personal Care Appliances by Category: Value 2018-2023
Table 142 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
Table 143 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
Table 144 - Sales of Body Shavers by Format: % Volume 2018-2023
Table 145 - Sales of Hair Care Appliances by Format: % Volume 2018-2023
Table 146 - NBO Company Shares of Personal Care Appliances 2019-2023
Table 147 - LBN Brand Shares of Personal Care Appliances 2020-2023
Table 148 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023
Table 149 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
Table 150 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028
Table 151 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028
Table 152 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dynamism of air fryers ensures light fryers continues to post the fastest retail volume growth
More affordable and unbranded options in the market, but safety concerns remain constant
Coffee machines and rice cookers continue to gain momentum

PROSPECTS AND OPPORTUNITIES

Small cooking appliances benefit from relatively short replacement cycles
Rice cookers and freestanding hobs to remain staple appliances
Air fryers to continue to gain momentum through healthy eating and innovation trends

CATEGORY DATA

Table 153 - Sales of Small Cooking Appliances by Category: Volume 2018-2023
Table 154 - Sales of Small Cooking Appliances by Category: Value 2018-2023
Table 155 - Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023
Table 156 - Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023
Table 157 - Sales of Freestanding Hobs by Format: % Volume 2018-2023
Table 158 - NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023
Table 159 - LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023
Table 160 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023
Table 161 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028
Table 162 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028
Table 163 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028
Table 164 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fast volume sales growth amid higher awareness of hygiene and cleanliness
Retail e-commerce responds to the need to widen the audience with more affordable prices
Automation and smart connectivity features push robotic vacuum cleaners

PROSPECTS AND OPPORTUNITIES

Busy lifestyles to increase the demand for robotic vacuum cleaners
Both the offer and competition are expected to intensify over the forecast period
Retail e-commerce to become a major platform for vacuum cleaners

CATEGORY DATA

Table 165 - Sales of Vacuum Cleaners by Category: Volume 2018-2023
Table 166 - Sales of Vacuum Cleaners by Category: Value 2018-2023
Table 167 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023
Table 168 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023
Table 169 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023
Table 170 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023
Table 171 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023
Table 172 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023
Table 173 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028
Table 174 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028
Table 175 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028
Table 176 - 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-the-philippines/report.