

Consumer Appliances in Poland

January 2024

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

Demand rebounds for dishwashers with consumers in search of convenience
Built-in dishwasher models witness solid demand
Slimline dishwashers gain ground due to the smaller kitchens in newer Polish homes

PROSPECTS AND OPPORTUNITIES

Scope for household penetration of dishwashers to rise
Economic recovery to help boost demand
Product development expected to focus on energy and water efficiency

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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Recovery in home laundry appliances
Automatic dryers are in high demand due to convenience
Competitive threat puts bigger focus on product innovation

PROSPECTS AND OPPORTUNITIES

Home laundry appliances to enjoy steady growth
Technology will fuel product innovation
Automatic dryers show solid growth potential

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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Household demand deterred by high inflation and lower levels of replacement
Smart and connected appliances continue to emerge
E-commerce gains further traction

PROSPECTS AND OPPORTUNITIES

Challenging outlook for large cooking appliances
Induction hobs set to gain ground, building on the format's already dominant position
E-commerce stands to make further progress

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 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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Microwave sales witness strong volume performance
Pre-prepared food drives demand for microwaves
E-commerce channel enjoys steady growth

PROSPECTS AND OPPORTUNITIES

Household penetration of microwaves has scope to rise further
Innovation likely to remain a key marketing tool for attracting the attention of consumers

Trends in packaged food to support sales of microwaves

CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2018-2023

Table 85 - Sales of Microwaves by Category: Value 2018-2023

Table 86 - Sales of Microwaves by Category: % Volume Growth 2018-2023

Table 87 - Sales of Microwaves by Category: % Value Growth 2018-2023

Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2019-2023

Table 89 - NBO Company Shares of Microwaves: % Volume 2019-2023

Table 90 - LBN Brand Shares of Microwaves: % Volume 2020-2023

Table 91 - Distribution of Microwaves by Format: % Volume 2018-2023

Table 92 - Production of Microwaves: Total Volume 2018-2023

Table 93 - Forecast Sales of Microwaves by Category: Volume 2023-2028

Table 94 - Forecast Sales of Microwaves by Category: Value 2023-2028

Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028

Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

Refrigeration Appliances in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic conditions hamper demand for refrigeration appliances

Electric wine coolers/chillers strike a chord with affluent consumer base

E-commerce continues to gain ground

PROSPECTS AND OPPORTUNITIES

Downward trend expected for refrigeration appliances

E-commerce to enjoy further steady growth

New product development central to stimulating sales

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 Smart 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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Split air conditioners gain further popularity
Demand for air purifiers increases in towns and cities with poor air quality
Players add new product features that promote health and wellness

PROSPECTS AND OPPORTUNITIES

Rising average temperatures to drive demand for air treatment products
Energy-efficient appliances of increasing importance to consumers
Air conditioning appliances to become more affordable

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 Smart 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: Volume 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: Value 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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home cooking trend supports growth of food preparation appliances
Consumers are keen on using food processors
Slow juicers gain further appeal due to health benefits

PROSPECTS AND OPPORTUNITIES

Food preparation appliances face moderate growth outlook
Appliances that facilitate the preparation of healthy food set to gain ground
New product development to focus on adding new functionality

CATEGORY DATA

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

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

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

Personal Care Appliances in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Moderate growth as consumers focus on personal grooming

Hair care strengthens as consumers seek multi-functional devices

High inflation and rising prices put some pressure on demand

PROSPECTS AND OPPORTUNITIES

New product development is crucial to driving sales

Increasing importance of personal hygiene and personal grooming to support sales

Importance of e-commerce set to increase as consumers value convenience

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 2020-2023

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

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

Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience and versatility drive appeal of small consumer appliances

Light fryers perform well as healthier cooking trend gains traction

Pod coffee machines continue to lose appeal

PROSPECTS AND OPPORTUNITIES

Small cooking appliances to enjoy steady growth

Sustainability to hinder development of pod coffee machines

E-commerce platforms offer more competitive pricing

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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vacuum cleaners enjoy slight volume sales recovery
 Stick and cordless vacuum cleaners gain appeal
 Expansion of smart vacuum cleaners

PROSPECTS AND OPPORTUNITIES

Convenience to drive demand in vacuum cleaners
 Energy efficiency and sustainability to gain importance in purchasing decision
 New product developments to capitalise on growing popularity of stick vacuum cleaners

CATEGORY DATA

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