



Consumer Appliances in the US

November 2023

Table of Contents

Consumer Appliances in the US

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 US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Quiet, and efficient performance remain key features in dishwashers

Limited volume growth, following a surge during the pandemic

Prices elevated but normalising

PROSPECTS AND OPPORTUNITIES

Continued growth over the early forecast period

Smart feature adoption will creep up with appliance upgrades

Manufacturing investments protect from future potential disruptions

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 US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home laundry appliances continues to suffer as economic uncertainty sets in

Weak housing market and decline in home renovation have a negative impact

Despite lower volume sales, e-commerce continues to grow

PROSPECTS AND OPPORTUNITIES

Consumer education around smart features will define the future of smart laundry appliances

Sustainability and new energy efficiency standards likely to affect both manufacturers and consumers

Laundry cycles customised to consumers' needs, and premium products set to drive growth

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 US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air quality concerns drive growth for electric large cooking appliances

High-end designs and functions of range cookers increase popularity in the premium space

Housing market slowdown dampens growth in large cooking appliances

PROSPECTS AND OPPORTUNITIES

With the kitchen the centre of the home, large cooking appliances set to see steady growth over the forecast period

Consumer interest in electric to increase, with health/environmental concerns around gas appliances

More limited usage may be seen as consumers turn to delivery and eating out

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued decline after pandemic high

Smart features see passive consumer adoption

Streamlined built-in designs remain popular

PROSPECTS AND OPPORTUNITIES

Microwaves is a staple appliances category, projected to experience stable growth

Air quality concerns to drive demand for microwaves with ventilation

Improvements in the housing market may drive growth

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Demand normalises following strong growth during the pandemic
- Supply chain normalisation yields a favourable outcome for Whirlpool
- Mid-tier brands expand design options, such as Best Buy's Insignia line

PROSPECTS AND OPPORTUNITIES

- Smart home features turn refrigeration appliances into a home hub
- Evolving consumer lifestyles to offer growth potential for refrigeration appliances
- Speciality alcoholic drinks trend set to carry over into refrigeration appliances

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cooling products grow as record-breaking temperatures force consumers to invest
Midea's U-shaped window air conditioner continues to be the hottest new product
Air purifiers sees significant growth due to higher awareness of the importance of air quality, and wildfires

PROSPECTS AND OPPORTUNITIES

Climate change and environmental concerns to propel growth in the forecast period
Smart products to continue to gain strength in air treatment products
Multipurpose air treatment products to continue to disrupt the category over the forecast period

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for food preparation appliances continues to decline in 2023
Juice extractors sees only low growth in 2023
Thermomix continues to disrupt the competitive landscape

PROSPECTS AND OPPORTUNITIES

Innovations in virtual retail
Growing market for pre-prepared meals will affect demand for food preparation appliances
Adjacent expansion presents opportunities for growth

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Maturity for electric facial cleansers

Multifunctionality in personal care appliances

Oral care ecosystems continue to see growth

PROSPECTS AND OPPORTUNITIES

Dyson's Airwrap as a disruptor

E-commerce facilitates differentiation and consumer education

Opportunity for pro-ageing devices

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium products contribute to volume growth for small cooking appliances

Additional usage occasions drive growth for air fryers and rice cookers

"Mini" can be a branding strategy

PROSPECTS AND OPPORTUNITIES

Adjacent expansion offers growth opportunities

Making small cooking appliances smarter

Sustainability and healthy eating trends likely to impact certain categories

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 the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

After significant pandemic-driven growth, a return to normality
Expansion of wet-dry options to provide time and space efficiency
Manufacturers continue to cater to pet owners

PROSPECTS AND OPPORTUNITIES

Robotic vacuum cleaners projected to see strong growth thanks to lower prices
Highly competitive space, with room for innovation and new entrants
Less time at home a potential driver for multifunctional and robotic 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-the-us/report.