

Consumer Appliances in Israel

December 2023

Table of Contents

Consumer Appliances in Israel

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dishwashers to benefit from removal of inspection requirements

BSH continues to hold a clear lead

Dishwashers category suffers from slowdown in housing market

PROSPECTS AND OPPORTUNITIES

Hybrid working arrangements to support demand

New energy rating label to have positive impact

BSH to retain lead, with consumers displaying an ongoing preference for built-in models

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers reluctant to spend on big ticket items Leading player, BSH, targets demand for convenience

Unfavourable housing market

PROSPECTS AND OPPORTUNITIES

Importers able to self-declare compliance with EU regulations

Environmental and economic concerns to influence purchasing behaviour

Outlook tied to housing market

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for large cooking appliances undermined by performance of housing market Importers see profits hit BSH retains lead

PROSPECTS AND OPPORTUNITIES

Consumers set to seek more energy efficient appliances Removal of requirement for inspections BSH to face growing competition

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher value models contribute to rise in prices
Freestanding models to remain dominant
Consumers reluctant to spend on kitchen appliances

PROSPECTS AND OPPORTUNITIES

Electra Consumer Products expected to retain lead

Multi-functionality offers consumers opportunity to save space

Hybrid working patterns to support demand

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenging political and economic situation leads to consumer caution

Brimag Digital Age retains lead, but faces growing competition from smaller players

Slowdown in housing market adversely affects demand

PROSPECTS AND OPPORTUNITIES

Removal of inspection requirement set to benefit category development Appliances and electronics specialists to remain dominant Hybrid work, health awareness and sustainability to influence demand

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hot climate supports demand, though sales muted at end of review period Dyson faces competition in air purifying segment

Electra's new launch in line with key trends

PROSPECTS AND OPPORTUNITIES

Investment in manufacturing facility may boost Electra Consumer Products' position

New import regulations set to benefit air conditioners

Growing focus on energy efficiency

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fall in volume sales

Sarig Electric leads with major brands

E-commerce continues to grow in importance

PROSPECTS AND OPPORTUNITIES

Cooking from home trend to support demand

Health and wellness a key factor

Further expansion of e-commerce expected

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Recent purchases reduce demand at end of review period

Dyson drives innovation

Procter & Gamble benefits from strength in oral care appliances

PROSPECTS AND OPPORTUNITIES

Potential for Dyson expansion in drugstore chain

Oral B employ blends digital and in-store experience

Sarig competing with Dyson in premium hair care

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slow cookers lose out to multi-functional products

Rising health consciousness boosting demand

Demand supported by high levels of cooking at home

PROSPECTS AND OPPORTUNITIES

Expansion of offer and increased competition

Growing demand for multi-functional products

Major players in strong position to reinforce strength

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pricing competition in middle range Innovation adding value to category Dyson stays out in front

PROSPECTS AND OPPORTUNITIES

Potential collaboration between Dyson and Super-Pharm Convenience factor to support demand for wet and dry vacuum cleaners Further growth ahead for stick 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-israel/report.