

Consumer Appliances in Australia

November 2023

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

[Dishwashers in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume demand declines amidst elevated interest rates
The emphasis on energy efficiency heightens in reaction to inflationary forces
Popularity of built-in formats and large capacity appliances

PROSPECTS AND OPPORTUNITIES

Recovery of growth to pre-pandemic levels, with value growth outpacing volume
Continuous focus on making household chores easier and more efficient
Evolving trends in connectivity, energy efficiency, and smart home integration

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 Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home laundry appliances sees a further slowdown in growth
Energy-saving appliances become key amidst economic uncertainty
Convenience and efficiency drive demand for washer dryers and eco-friendly features

PROSPECTS AND OPPORTUNITIES

Inventory pressure expected to ease, with growth recovering to pre-pandemic levels
Embracing high-performance laundry solutions
Rising demand for sustainable laundry solutions will drive consumer and manufacturer actions

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales drop as unfavourable economic conditions persist

Rise of induction cooking in modern kitchens

Embracing multifunctionality and healthy cooking

PROSPECTS AND OPPORTUNITIES

Early signs of economic recovery bring an optimistic outlook

Sustainability and multifunctionality poised for growth acceleration

Automated kitchens set to see rising popularity

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Microwaves grapples with inflationary pressure as interest in built-in format surges

Multifunctionality and healthy features shine

Rising popularity of a black finish for appliances in modern kitchens

PROSPECTS AND OPPORTUNITIES

Built-in format and modern designs poised to drive demand

Downward pressure from versatile ovens expected to continue

The growing prevalence of multifunctionality

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Weak demand contributes to declines in both volume and value sales
- Inflationary crisis exacerbates energy consciousness amongst Australians
- Consumers demand advanced preservation technology and contemporary design in refrigeration appliances

PROSPECTS AND OPPORTUNITIES

- Innovation to drive up replacement despite continuing weak demand
- Fusing channels for success: The imperative of an omnichannel strategy
- The reduction of food waste set to enhance sustainability claims in 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 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
- Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of dehumidifiers struggle after a previous strong performance
Pervasive integration of air purification technology across diverse categories
Rising demand for compatibility and sustainability in air conditioners

PROSPECTS AND OPPORTUNITIES

El Niño weather pattern will spur demand for cooling appliances
Air purifiers poised to continue to grow, with advanced technology targeting larger spaces
Smart home will continue to drive connectivity

CATEGORY DATA

Table 118 - Sales of Air Treatment Products by Category: Volume 2018-2023
Table 119 - Sales of Air Treatment Products by Category: Value 2018-2023
Table 120 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
Table 121 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023
Table 122 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023
Table 123 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023
Table 124 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
Table 125 - Distribution of Air Treatment Products by Format: % Volume 2018-2023
Table 126 - Production of Air Conditioners: Total Volume 2018-2023
Table 127 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028
Table 128 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028
Table 130 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

Food Preparation Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Food preparation appliances experiences a significant decline
Popularity of multifunctionality on the rise as consumers seek to reduce their appliances and energy bills
Offline channels making a comeback, while e-commerce continues to expand

PROSPECTS AND OPPORTUNITIES

Category poised for further decline, with emphasis on value and lifestyle alignment
Rise of specialised accessories set to promote multifunctionality
Rising popularity of compact living, and emphasis on durability in marketing

CATEGORY DATA

Table 131 - Sales of Food Preparation Appliances by Category: Volume 2018-2023
Table 132 - Sales of Food Preparation Appliances by Category: Value 2018-2023
Table 133 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023
Table 134 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023
Table 135 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023
Table 136 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023
Table 137 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023
Table 138 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028
Table 140 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

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

Personal Care Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite declining volumes of personal care appliances, value sales see growth
Hair care appliances sees a rebound, driven by premium hair styling products
Despite a decline in overall volume sales, multi-utility body shavers are on the rise

PROSPECTS AND OPPORTUNITIES

Innovative technologies and premiumisation set to drive growth
Hot air styling technology poised to amplify the growth of hair care appliances
Technological advances primed to accelerate the expansion of electric facial cleansers and oral care appliances

CATEGORY DATA

- Table 142 - Sales of Personal Care Appliances by Category: Volume 2018-2023
- Table 143 - Sales of Personal Care Appliances by Category: Value 2018-2023
- Table 144 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023
- Table 145 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023
- Table 146 - Sales of Body Shavers by Format: % Volume 2018-2023
- Table 147 - Sales of Hair Care Appliances by Format: % Volume 2018-2023
- Table 148 - NBO Company Shares of Personal Care Appliances 2019-2023
- Table 149 - LBN Brand Shares of Personal Care Appliances 2020-2023
- Table 150 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023
- Table 151 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028
- Table 152 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028
- Table 153 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028
- Table 154 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressure exacerbates challenges
Wellness and multifunctionality fuel growth for rice cookers and light fryers
Espresso coffee machines benefits from consumers seeking to recreate a café-like experience at home

PROSPECTS AND OPPORTUNITIES

Pre-pandemic growth poised to return
Evolving trends of connectivity, convenience, and cold brew in coffee machines
Persistent premiumisation in small cooking appliances

CATEGORY DATA

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

Table 163 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

Table 165 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

Vacuum Cleaners in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic challenges temper demand, but stick and robotic vacuum cleaners maintain growth

Robotic vacuum cleaners continues to flourish

Dyson expands its presence by entering robotic vacuum cleaners

PROSPECTS AND OPPORTUNITIES

A resilient growth trajectory, driven by consumer preference, technology, and pricing strategies

Rising demand for convenience will fuel demand for all-in-one vacuum cleaners

Anticipation of product differentiation and dynamism in vacuum cleaners

CATEGORY DATA

Table 167 - Sales of Vacuum Cleaners by Category: Volume 2018-2023

Table 168 - Sales of Vacuum Cleaners by Category: Value 2018-2023

Table 169 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023

Table 170 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

Table 171 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023

Table 172 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

Table 173 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

Table 174 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

Table 175 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028

Table 178 - 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-australia/report.