



**Euromonitor
International**

Air Treatment Products in Germany

January 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Post-pandemic purchase reluctance and perceived irrelevance lead to decline in air purifiers, while demand for cooling appliances is driven by climate developments

Players that offer multifunctionality, efficiency and high quality are winning in the competitive landscape

Shift towards e-commerce driven by direct-to-consumer sales and value hackers

PROSPECTS AND OPPORTUNITIES

Climate change, housing market and heat pump trends will affect dynamics within cooling

Raising awareness of the benefits of air purifiers, while investing in multifunctionality, connectivity and AI

Energy efficiency and "right to repair" are important for local consumers

CATEGORY DATA

Table 1 - Sales of Air Treatment Products by Category: Volume 2019-2024

Table 2 - Sales of Air Treatment Products by Category: Value 2019-2024

Table 3 - Sales of Air Treatment Products by Category: % Volume Growth 2019-2024

Table 4 - Sales of Air Treatment Products by Category: % Value Growth 2019-2024

Table 5 - Sales of Air Conditioners by Smart Appliances: % Volume 2020-2024

Table 6 - NBO Company Shares of Air Treatment Products: % Volume 2020-2024

Table 7 - LBN Brand Shares of Air Treatment Products: % Volume 2021-2024

Table 8 - Distribution of Air Treatment Products by Format: % Volume 2019-2024

Table 9 - Production of Air Conditioners: Total Volume 2019-2024

Table 10 - Forecast Sales of Air Treatment Products by Category: Volume 2024-2029

Table 11 - Forecast Sales of Air Treatment Products by Category: Value 2024-2029

Table 12 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2024-2029

Table 13 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2024-2029

Consumer Appliances in Germany - Industry Overview

EXECUTIVE SUMMARY

Consumer appliances in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for consumer appliances?

MARKET INDICATORS

Table 14 - Household Penetration of Selected Total Stock Consumer Appliances by Category 2019-2025

Table 15 - Replacement Cycles of Consumer Appliances by Category 2019-2025

MARKET DATA

Table 16 - Sales of Consumer Appliances by Category: Volume 2019-2024

Table 17 - Sales of Consumer Appliances by Category: Value 2019-2024

Table 18 - Sales of Consumer Appliances by Category: % Volume Growth 2019-2024

Table 19 - Sales of Consumer Appliances by Category: % Value Growth 2019-2024

Table 20 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2019-2024

Table 21 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2019-2024

Table 22 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2019-2024

Table 23 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2019-2024

Table 24 - Sales of Small Appliances by Category: Volume 2019-2024

Table 25 - Sales of Small Appliances by Category: Value 2019-2024

Table 26 - Sales of Small Appliances by Category: % Volume Growth 2019-2024

Table 27 - Sales of Small Appliances by Category: % Value Growth 2019-2024

Table 28 - NBO Company Shares of Major Appliances: % Volume 2020-2024

Table 29 - LBN Brand Shares of Major Appliances: % Volume 2021-2024

Table 30 - NBO Company Shares of Small Appliances: % Volume 2020-2024

Table 31 - LBN Brand Shares of Small Appliances: % Volume 2021-2024

Table 32 - Distribution of Major Appliances by Format: % Volume 2019-2024

Table 33 - Distribution of Small Appliances by Format: % Volume 2019-2024

Table 34 - Forecast Sales of Consumer Appliances by Category: Volume 2024-2029

Table 35 - Forecast Sales of Consumer Appliances by Category: Value 2024-2029

Table 36 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2024-2029

Table 37 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2024-2029

Table 38 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2024-2029

Table 39 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2024-2029

Table 40 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2024-2029

Table 41 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2024-2029

Table 42 - Forecast Sales of Small Appliances by Category: Volume 2024-2029

Table 43 - Forecast Sales of Small Appliances by Category: Value 2024-2029

Table 44 - Forecast Sales of Small Appliances by Category: % Volume Growth 2024-2029

Table 45 - Forecast Sales of Small Appliances by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/air-treatment-products-in-germany/report.