



Euromonitor
International

Consumer Appliances in Indonesia

December 2024

Table of Contents

EXECUTIVE SUMMARY

Consumer appliances in 2024: The big picture
2024 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 2019-2025
Table 2 - Replacement Cycles of Consumer Appliances by Category 2019-2025

MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2019-2024
Table 4 - Sales of Consumer Appliances by Category: Value 2019-2024
Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2019-2024
Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2019-2024
Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2019-2024
Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2019-2024
Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2019-2024
Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2019-2024
Table 11 - Sales of Small Appliances by Category: Volume 2019-2024
Table 12 - Sales of Small Appliances by Category: Value 2019-2024
Table 13 - Sales of Small Appliances by Category: % Volume Growth 2019-2024
Table 14 - Sales of Small Appliances by Category: % Value Growth 2019-2024
Table 15 - NBO Company Shares of Major Appliances: % Volume 2020-2024
Table 16 - LBN Brand Shares of Major Appliances: % Volume 2021-2024
Table 17 - NBO Company Shares of Small Appliances: % Volume 2020-2024
Table 18 - LBN Brand Shares of Small Appliances: % Volume 2021-2024
Table 19 - Distribution of Major Appliances by Format: % Volume 2019-2024
Table 20 - Distribution of Small Appliances by Format: % Volume 2019-2024
Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2024-2029
Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2024-2029
Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2024-2029
Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2024-2029
Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2024-2029
Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2024-2029
Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2024-2029
Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2024-2029
Table 29 - Forecast Sales of Small Appliances by Category: Volume 2024-2029
Table 30 - Forecast Sales of Small Appliances by Category: Value 2024-2029
Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2024-2029
Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dishwashers is a niche but growing category in Indonesia
Dishwashers target convenience and efficiency for young families
Electrolux leads dishwashers in Indonesia despite the rising competition

PROSPECTS AND OPPORTUNITIES

Electricity supply challenges may hinder the widespread adoption of dishwashers
Affluent urban households and e-commerce set to boost sales of dishwashers
Overcoming the cultural barriers to the adoption of dishwashers in Indonesia

CATEGORY DATA

- Table 33 - Sales of Dishwashers by Category: Volume 2019-2024
- Table 34 - Sales of Dishwashers by Category: Value 2019-2024
- Table 35 - Sales of Dishwashers by Category: % Volume Growth 2019-2024
- Table 36 - Sales of Dishwashers by Category: % Value Growth 2019-2024
- Table 37 - Sales of Dishwashers by Format: % Volume 2019-2024
- Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2020-2024
- Table 39 - NBO Company Shares of Dishwashers: % Volume 2020-2024
- Table 40 - LBN Brand Shares of Dishwashers: % Volume 2021-2024
- Table 41 - Distribution of Dishwashers by Format: % Volume 2019-2024
- Table 42 - Production of Dishwashers: Total Volume 2019-2024
- Table 43 - Forecast Sales of Dishwashers by Category: Volume 2024-2029
- Table 44 - Forecast Sales of Dishwashers by Category: Value 2024-2029
- Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2024-2029
- Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2024-2029

Home Laundry Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Home laundry appliances in Indonesia sees a shifting landscape
Attracting customers with affordable products and offline experience centres
Sharp leads home laundry appliances in Indonesia

PROSPECTS AND OPPORTUNITIES

Challenges will contribute to modest growth in demand for home laundry appliances
AI-enhanced smart laundry appliances set to transform the category
Continued rise in demand expected for automatic washing machines in Indonesia

CATEGORY DATA

- Table 47 - Sales of Home Laundry Appliances by Category: Volume 2019-2024
- Table 48 - Sales of Home Laundry Appliances by Category: Value 2019-2024
- Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2019-2024
- Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2019-2024
- Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2019-2024
- Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2019-2024
- Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2019-2024
- Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2020-2024
- Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2020-2024
- Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2021-2024
- Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2019-2024
- Table 58 - Production of Home Laundry Appliances: Total Volume 2019-2024

Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2024-2029

Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2024-2029

Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2024-2029

Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2024-2029

Large Cooking Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growing demand for large cooking appliances in Indonesia in 2024
- Built-in hobs leads the sales and growth of large cooking appliances
- Modena Indonesia leads large cooking appliances

PROSPECTS AND OPPORTUNITIES

- Positive outlook for large cooking appliances
- The competition is expected to intensify as smaller brand expand distribution
- Challenges and opportunities in large cooking appliances

CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2019-2024

Table 64 - Sales of Large Cooking Appliances by Category: Value 2019-2024

Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2019-2024

Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2019-2024

Table 67 - Sales of Built-in Hobs by Format: % Volume 2019-2024

Table 68 - Sales of Ovens by Smart Appliances: % Volume 2020-2024

Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2020-2024

Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2021-2024

Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2020-2024

Table 72 - NBO Company Shares of Ovens: % Volume 2020-2024

Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2020-2024

Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2020-2024

Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2020-2024

Table 76 - NBO Company Shares of Cookers: % Volume 2020-2024

Table 77 - NBO Company Shares of Range Cookers: % Volume 2020-2024

Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2019-2024

Table 79 - Production of Large Cooking Appliances: Total Volume 2019-2024

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2024-2029

Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2024-2029

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2024-2029

Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2024-2029

Microwaves in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Urbanisation and busy lifestyles fuel dynamic growth for microwaves
- Rising demand for multifunctional microwaves in Indonesia
- Sharp leads microwaves amidst rising competition

PROSPECTS AND OPPORTUNITIES

- Future growth in demand for microwaves will be driven by urbanisation and desire for convenience
- Educational campaigns likely to be crucial for expanding the penetration of microwaves

The intensifying competition will drive innovation in microwaves in Indonesia

CATEGORY DATA

- Table 84 - Sales of Microwaves by Category: Volume 2019-2024
- Table 85 - Sales of Microwaves by Category: Value 2019-2024
- Table 86 - Sales of Microwaves by Category: % Volume Growth 2019-2024
- Table 87 - Sales of Microwaves by Category: % Value Growth 2019-2024
- Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2020-2024
- Table 89 - NBO Company Shares of Microwaves: % Volume 2020-2024
- Table 90 - LBN Brand Shares of Microwaves: % Volume 2021-2024
- Table 91 - Distribution of Microwaves by Format: % Volume 2019-2024
- Table 92 - Production of Microwaves: Total Volume 2019-2024
- Table 93 - Forecast Sales of Microwaves by Category: Volume 2024-2029
- Table 94 - Forecast Sales of Microwaves by Category: Value 2024-2029
- Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2024-2029
- Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2024-2029

Refrigeration Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Urbanisation drives growth for refrigeration appliances
- Rising affordability and changing preferences in fridge-freezers in Indonesia
- Sharp Electronics maintains its lead in refrigeration appliances

PROSPECTS AND OPPORTUNITIES

- Growth in refrigeration appliances set to be driven by property ownership and replacement sales
- Growth projected for freestanding freezers and larger refrigeration appliances
- Refrigeration appliances manufacturers will emphasise design and lifestyle

CATEGORY DATA

- Table 97 - Sales of Refrigeration Appliances by Category: Volume 2019-2024
- Table 98 - Sales of Refrigeration Appliances by Category: Value 2019-2024
- Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2019-2024
- Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2019-2024
- Table 101 - Sales of Freezers by Format: % Volume 2019-2024
- Table 102 - Sales of Freezers by Volume Capacity: % Volume 2019-2024
- Table 103 - Sales of Fridge Freezers by Format: % Volume 2019-2024
- Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2019-2024
- Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2020-2024
- Table 106 - Sales of Fridges by Volume Capacity: % Volume 2019-2024
- Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2020-2024
- Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2021-2024
- Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2020-2024
- Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2020-2024
- Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2020-2024
- Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2020-2024
- Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2019-2024
- Table 114 - Production of Refrigeration Appliances: Total Volume 2019-2024
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2024-2029
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2024-2029
- Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2024-2029
- Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2024-2029

Air Treatment Products in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Surge in sales of air treatment products driven by hotter weather
- Rising air pollution drives continued growth for air purifiers
- Intense competition in air treatment products spurs innovation and growth

PROSPECTS AND OPPORTUNITIES

- Future growth and challenges for air treatment products in Indonesia
- Increasing demand for air purifiers, driven by pollution and health concerns
- Shift towards energy efficiency and cost effectiveness

CATEGORY DATA

- Table 119 - Sales of Air Treatment Products by Category: Volume 2019-2024
- Table 120 - Sales of Air Treatment Products by Category: Value 2019-2024
- Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2019-2024
- Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2019-2024
- Table 123 - Sales of Air Conditioners by Smart Appliances: % Volume 2020-2024
- Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2020-2024
- Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2021-2024
- Table 126 - Distribution of Air Treatment Products by Format: % Volume 2019-2024
- Table 127 - Production of Air Conditioners: Total Volume 2019-2024
- Table 128 - Forecast Sales of Air Treatment Products by Category: Volume 2024-2029
- Table 129 - Forecast Sales of Air Treatment Products by Category: Value 2024-2029
- Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2024-2029
- Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2024-2029

Food Preparation Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growing familiarity with and demand for food preparation appliances
- Efficiency and health trends drive growth in food processors and slow juicers
- Philips maintains its strong reputation amidst rising competition

PROSPECTS AND OPPORTUNITIES

- Growth in food preparation appliances to be driven by affordable prices
- Gen Z: The next target market for food preparation appliances
- E-commerce to fuel the growth of food preparation appliances in Indonesia

CATEGORY DATA

- Table 132 - Sales of Food Preparation Appliances by Category: Volume 2019-2024
- Table 133 - Sales of Food Preparation Appliances by Category: Value 2019-2024
- Table 134 - Sales of Food Preparation Appliances by Category: % Volume Growth 2019-2024
- Table 135 - Sales of Food Preparation Appliances by Category: % Value Growth 2019-2024
- Table 136 - NBO Company Shares of Food Preparation Appliances: % Volume 2020-2024
- Table 137 - LBN Brand Shares of Food Preparation Appliances: % Volume 2021-2024
- Table 138 - Distribution of Food Preparation Appliances by Format: % Volume 2019-2024
- Table 139 - Forecast Sales of Food Preparation Appliances by Category: Volume 2024-2029
- Table 140 - Forecast Sales of Food Preparation Appliances by Category: Value 2024-2029

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2024-2029

Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2024-2029

Personal Care Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Exceptional growth for personal care appliances in Indonesia, driven by beauty trends
- Philips maintains its lead in personal care appliances in Indonesia
- Body shavers and electric facial cleansers see growth from a lower base

PROSPECTS AND OPPORTUNITIES

- Strong growth predicted for personal care appliances in Indonesia
- E-commerce set to drive growth for personal care appliances in Indonesia
- Dynamic growth expected for body shavers and hair care appliances

CATEGORY DATA

- Table 143 - Sales of Personal Care Appliances by Category: Volume 2019-2024
- Table 144 - Sales of Personal Care Appliances by Category: Value 2019-2024
- Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2019-2024
- Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2019-2024
- Table 147 - Sales of Body Shavers by Format: % Volume 2019-2024
- Table 148 - Sales of Hair Care Appliances by Format: % Volume 2019-2024
- Table 149 - NBO Company Shares of Personal Care Appliances 2020-2024
- Table 150 - LBN Brand Shares of Personal Care Appliances 2021-2024
- Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2019-2024
- Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2024-2029
- Table 153 - Forecast Sales of Personal Care Appliances by Category: Value 2024-2029
- Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2024-2029
- Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2024-2029

Small Cooking Appliances in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Steady demand for freestanding hobs and rice cookers as households rise
- Rapid growth of air fryers in Indonesia
- Demand for compact and multifunctional appliances

PROSPECTS AND OPPORTUNITIES

- Freestanding hobs and rice cookers expected to continue to dominate small cooking appliances
- Health trends set to shape the future of small cooking appliances
- Evolving trends in small cooking appliances in Indonesia

CATEGORY DATA

- Table 156 - Sales of Small Cooking Appliances by Category: Volume 2019-2024
- Table 157 - Sales of Small Cooking Appliances by Category: Value 2019-2024
- Table 158 - Sales of Small Cooking Appliances by Category: % Volume Growth 2019-2024
- Table 159 - Sales of Small Cooking Appliances by Category: % Value Growth 2019-2024
- Table 160 - Sales of Freestanding Hobs by Format: % Volume 2019-2024
- Table 161 - NBO Company Shares of Small Cooking Appliances: % Volume 2020-2024
- Table 162 - LBN Brand Shares of Small Cooking Appliances: % Volume 2021-2024

Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2019-2024

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Volume 2024-2029

Table 165 - Forecast Sales of Small Cooking Appliances by Category: Value 2024-2029

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2024-2029

Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2024-2029

Vacuum Cleaners in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising popularity and growth of vacuum cleaners in Indonesia
- Growth for stick vacuum cleaners, and other shifts in vacuum cleaners
- Electrolux Indonesia loses its lead in vacuum cleaners as competitors offer lower prices

PROSPECTS AND OPPORTUNITIES

- Vacuum cleaners shows promising potential in Indonesia
- Innovation to drive increased demand for vacuum cleaners
- Emerging trends in vacuum cleaners in the Indonesian market

CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2019-2024

Table 169 - Sales of Vacuum Cleaners by Category: Value 2019-2024

Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2019-2024

Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2019-2024

Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2020-2024

Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2020-2024

Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2021-2024

Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2019-2024

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2024-2029

Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2024-2029

Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2024-2029

Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2024-2029

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-indonesia/report.