

# **Consumer Appliances in Austria**

December 2024

Table of Contents

#### Consumer Appliances in Austria

#### 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

#### Dishwashers in Austria

**KEY DATA FINDINGS** 

#### 2024 DEVELOPMENTS

Dishwashers suffers in 2024 as fewer new kitchens are installed Smaller formats attract limited consumer interest Category leader focuses on energy efficiency

#### PROSPECTS AND OPPORTUNITIES

Demand for dishwashers is likely to recover soon Amid lack of innovation, sustainability is expected to be key driver of growth Brands in lower-price segments expected to have best growth potential

#### CATEGORY DATA

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

#### Home Laundry Appliances in Austria

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Slight decline for home laundry appliances in Austria in 2024 Hisense Gorenje continues to gain volume share Water and energy-saving features are important for Austrian consumers

#### PROSPECTS AND OPPORTUNITIES

Outlook is positive for home laundry appliances in the years ahead Renting may offer scope for growth in home laundry appliances Some of Miele's production of home laundry appliances set to move abroad

#### 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 2019-2024 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 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2024-2029Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2024-2029Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2024-2029Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2024-2029

#### Large Cooking Appliances in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Large cooking appliances impacted once again by weak property industry Miele products are no longer found on Amazon BSH Hausgeräte GmbH retains the lead in a relatively consolidated field

#### PROSPECTS AND OPPORTUNITIES

Recovery of demand for new kitchens expected to lead to growth Freestanding cookers have potential for growth Replacement of Zanussi with Electrolux will likely see the player continue to lose share

#### 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 Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Microwaves benefits from improving consumer sentiment in 2024 Focus on basic functions and price shapes microwaves' performance Role of homewares and home furnishing stores declines

#### PROSPECTS AND OPPORTUNITIES

Demand for microwaves expected to continue throughout the forecast period Lower-price options are expected to continue dominating volume sales

E-commerce will likely continue to gain ground over the forecast period

#### 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 by Category: 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 Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Weak property industry heralds further decline for refrigeration appliances Hisense Gorenje Austria continues to perform well in 2024 Electrolux replaces Zanussi brand with Electrolux

#### PROSPECTS AND OPPORTUNITIES

Positive outlook for the category over the forecast period Electrolux brand has yet to prove its worth to Austrian consumers Optimistic outlook for Hisense Gorenje Austria

#### 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 Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Consumer reluctance to buy property curbs sales of air treatment products in 2024 Sales performance does not reflect changes in attitudes towards air conditioning systems Air purifiers return to moderate growth

#### PROSPECTS AND OPPORTUNITIES

Air conditioners are on many consumers' wish lists Heat pumps will likely have an impact on demand for air conditioners Dyson study highlighting weaknesses in indoor air quality in Austria offers scope for innovation

#### CATEGORY DATA

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

#### Food Preparation Appliances in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Improving consumer sentiment helps food preparation appliances Slow juicers perform well within food preparation appliances Vorwerk drives unit price growth in 2024

#### PROSPECTS AND OPPORTUNITIES

Demand for food preparation appliances expected to have slight growth potential Cooling of Thermomix sales seems inevitable KitchenAid spurs the young cordless category with the Go Cordless series

#### CATEGORY DATA

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

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2024-2029Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2024-2029

#### Personal Care Appliances in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Improving consumer sentiment supports sales of personal care appliances in 2024 Dyson product launches attract interest E-commerce maintains upward trajectory

#### PROSPECTS AND OPPORTUNITIES

Positive outlook for personal care appliances in the years ahead Electric toothbrushes likely to become increasingly competitive Products within other personal care appliances set to become ever more interesting

#### 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 by Format: % Volume 2019-2024
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: Wolume 2024-2029
Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2024-2029

#### Small Cooking Appliances in Austria

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Upturn in demand, but poor performance coffee machines hamper small cooking appliances Noticeable recovery in demand for espresso coffee machines Thermomix is responsible for a new but expensive product in small cooking appliances

#### PROSPECTS AND OPPORTUNITIES

Outlook for most sub-categories is positive, but coffee machines are likely to see slower growth Cooperation with WMF brings SEB brands advantages for the near future Philips Airfryer brand remains in a good position for the future

#### CATEGORY DATA

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

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Vacuum cleaners' fortunes improve in 2024 Dyson's direct-to-consumer strategy disgruntles retailers Decline in momentum for robotic vacuum cleaners

#### PROSPECTS AND OPPORTUNITIES

High potential for growth in the years ahead The entry of new brands such as Shark will challenge Dyson's position Bissell brand has an optimistic outlook

#### CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2019-2024Table 169 - Sales of Vacuum Cleaners by Category: Value 2019-2024Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2019-2024Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2019-2024Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2020-2024Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2020-2024Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2021-2024Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2019-2024Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2024-2029Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2024-2029Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2024-2029Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Volume 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-austria/report.