

Dishwashers in India

Euromonitor International February 2024

> This sample report is for illustration purposes only. Some content and data have been changed.

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DISHWASHERS IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Normalising of demand post-pandemic, hindered by inflationary concerns and the return of domestic help

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Bosch retains slim lead of dishwashers in 2023

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Offline stores continue to dominate distribution

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PROSPECTS AND OPPORTUNITIES

Category growth to remain muted over the forecast period

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Localisation the way forward to ensure greater penetration of dishwashers

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CATEGORY DATA

Table 1		Sales of Dishwashers b	Sales of Dishwashers by Category: Volume 2018-2023					
'000 unit	ts		2018	2019	2020	2021	2022	2023
Dishwas - Built-in - Freesta Dishw	Dishw		_		Data remo	ved from sample		
Source:		onitor International from officia necks, trade interviews, trade		e associatio	ons, trade pres	ss, company research,		
Table 2		Sales of Dishwashers b	y Category: \	/alue 201	8-2023			
INR milli	ion		2018	2019	2020	2021	2022	2023
Dishwas - Built-in - Freesta Dishw	Dishw		-	[)ata remov	ed from sample		
Source:		onitor International from officia necks, trade interviews, trade		e associatio	ons, trade pres	ss, company research,		
Table 3		Sales of Dishwashers b	y Category: %	% Volume	Growth 20	18-2023		
% volum	ne grow	rth			2022/23	2018-23 CAGR	2018/23	3 Total
Dishwas - Built-in - Freesta	Dishw	ashers Dishwashers			C	Data removed from	sample	
Source:	Euromo	onitor International from officia necks, trade interviews, trade		e associatio	ons, trade pres	ss, company research,		
Table 4		Sales of Dishwashers b	y Category: %	% Value G	Frowth 2018	3-2023		
% currer	nt value	e growth		:	2022/23	2018-23 CAGR	2018/23	3 Total
Dishwashers - Built-in Dishwashers - Freestanding Dishwashers				[Data removed from	sample		
Source:		onitor International from officia necks, trade interviews, trade		e associatio	ons, trade pres	ss, company research,		



% retail volume	2018	2019	2020	2021	2022	2023
Table-Top Full Size Slimline Compact Dishdrawer Total		D	ata removed	from sample	•	

Table 6 Sales of Dishwashers by Connected Appliances: % Volume 2019-2023

% retail volume	2019	2020	2021	2022	2023
Smart Non-Smart Total		Data rem	oved from sa	Imple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 NBO Company Shares of Dishwashers: % Volume 2019-2023

% retail volume Company		2019	2020	2021	2022	2023
	Data re	moved fron	n sample			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Dishwashers: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023			
Data removed from sample								

	Data removed from sample					
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

Table 9 Distribution of Dishwashers by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Department Stores Variety Stores Variety Stores Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Non-retail channels - Builder Merchants and Construction Total				from sample		
Source: Euromonitor International from offi		de associations,	trade press, cor	npany research,		

store checks, trade interviews, trade sources Note: Others includes sales from door to door selling, warehouse clubs etc

Table 10 Forecast Sales of Dishwashers by Category: Volume 2023-2028

'000 un	its	2023	2024	2025	2026	2027	2028
Dishwashers - Built-in Dishwashers - Freestanding Dishwashers			D	ata removed	from sample		
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources							

Table 11	Forecast Sales of Dishwashers by Category: Value 2023-2028

INR mil	lion	2023	2024	2025	2026	2027	2028
Dishwashers - Built-in Dishwashers - Freestanding Dishwashers			C	Data removed	l from samp	le	
Source:	 Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources 						

Table 12 Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028

% volun	% volume growth		2023-28 CAGR	2023/28 Total
Dishwashers - Built-in Dishwashers - Freestanding Dishwashers			Data removed from	sample
Source:	Euromonitor International from trade associations, trade press trade sources	, company re	esearch, trade interviews,	

Table 13 Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total		
Dishwashers - Built-in Dishwashers - Freestanding Dishwashers	D	Data removed from sample			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CONSUMER APPLIANCES IN INDIA -INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for consumer appliances?

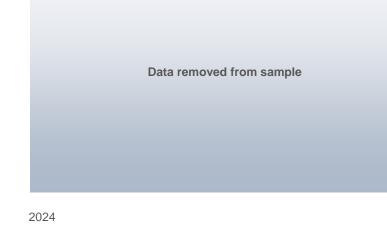
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MARKET INDICATORS

Table 14Household Penetration of Selected Total Stock Consumer Appliances byCategory 2018-2024

% households	2018	2019	2020	2021	2022	2023
Dishwashers Automatic Dryers Automatic Washer Dryers Automatic Washing Machines Semi-Automatic Washing Machines Built-in Hobs Ovens Cooker Hoods Cookers Range Cookers Microwaves Electric Wine Coolers/ Chillers Freezers Fridge Freezers Fridges Portable Room Air Conditioners		Da	ta removed f	rom sample		

Split Air Conditioners Window Air Conditioners **Cooling Fans** Food Preparation Appliances Heating Appliances Irons **Body Shavers** Hair Care Appliances **Coffee Machines Freestanding Hobs** Cylinder Vacuum Cleaners Handheld Vacuum Cleaners Stick Vacuum Cleaners Upright Vacuum Cleaners Robotic Vacuum Cleaners



Dishwashers Automatic Dryers Automatic Washer Dryers Automatic Washing Machines Semi-Automatic Washing Machines **Built-in Hobs** Ovens Cooker Hoods Cookers Range Cookers Microwaves Electric Wine Coolers/ Chillers Freezers Fridge Freezers Fridges Data removed from sample Portable Room Air Conditioners Split Air Conditioners Window Air Conditioners **Cooling Fans** Food Preparation Appliances Heating Appliances Irons **Body Shavers** Hair Care Appliances **Coffee Machines Freestanding Hobs** Cylinder Vacuum Cleaners Handheld Vacuum Cleaners Stick Vacuum Cleaners Upright Vacuum Cleaners Robotic Vacuum Cleaners

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 15 Replacement Cycles of Consumer Appliances by Category 2018-2024

Replacement cycles - years	2018	2019	2020	2021	2022	2023
Dishwashers Automatic Washer Dryers Automatic Washing Machines Semi-Automatic Washing Machines Built-in Hobs Ovens Cooker Hoods Cookers Microwaves Fridge Freezers Fridges Split Air Conditioners Window Air Conditioners Cooling Fans Food Preparation Appliances Heating Appliances Irons Body Shavers Hair Care Appliances Coffee Machines Freestanding Hobs Cylinder Vacuum Cleaners Handheld Vacuum Cleaners		Da	ta removed f	rom sample		
	2024					
Dishwashers Automatic Washer Dryers Automatic Washing Machines Semi-Automatic Washing Machines Built-in Hobs Ovens Cooker Hoods Cookers Microwaves						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade interviews

Fridge Freezers

Cooling Fans Food Preparation Appliances Heating Appliances

Split Air Conditioners Window Air Conditioners

Body Shavers Hair Care Appliances Coffee Machines Freestanding Hobs Cylinder Vacuum Cleaners Handheld Vacuum Cleaners

Fridges

Irons

MARKET DATA

Table 16	Fable 16Sales of Consumer Appliances by Category: Volume 2018-2023							
'000 units		2018	2019	2020	2021	2022	2023	
Consumer App Major Applianc Small Applianc	ces	_	Data removed from sample					
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources								
Table 17	Sales of Consumer	Appliances by	Category:	/alue 2018	-2023			
INR million		2018	2019	2020	2021	2022	2023	
Consumer App Major Applianc Small Applianc	ces		D	ata remove	ed from sample			
	onitor International from thecks, trade interviews,		rade associati	ons, trade pre	ess, company research	٦,		
Table 18	Sales of Consumer	Appliances by	Category:	% Volume (Growth 2018-2023			
% volume grov	vth			2022/23	2018-23 CAGR	2018/2	23 Total	
Consumer App Major Applianc Small Applianc	ces				Data removed fro	m sample		
	onitor International from the cks, trade interviews, the cks, trade interviews, the cks is the cks of the cks		rade associati	ons, trade pre	ess, company research	٦,		
Table 19	Sales of Consumer	Appliances by	Category:	% Value Gr	owth 2018-2023			
% current valu	e growth			2022/23	2018-23 CAGR	2018/2	23 Total	
Consumer App Major Applianc Small Applianc	ces				Data removed fro	m sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20	Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume
2018-2023	

'000 units

	2018	2019	2020	2021	2022	2023
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Automatic Dryers - Automatic Dryers - Freestanding Automatic Washer Dryers - Built-in Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Machines - Built-in Automatic Washing Machines - Freestanding Automatic Washing Machines - Freestanding Automatic Washing Machines - Freestanding Automatic Washing Machines - Freestanding Appliances - Built-in Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods - Semi-Automatic Washing Machines - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Microwaves Refrigeration Appliances - Freestanding Microwaves - Freestanding Microwaves - Freestanding Microwaves - Freestanding Microwaves - Freestanding Microwaves - Built-in Microwaves - Built-in Microwaves - Built-in Flectric Wine Coolers/Chillers - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers		Dat	a removed fro	om sample		

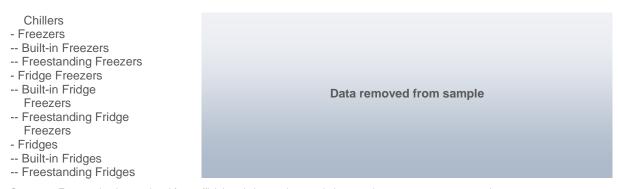


Table 21	Sales of Major Appliances by Category and Built-in/Freestanding Split: Value
2018-2023	

INR million	2018	2019	2020	2021	2022	2023
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Built-in Automatic Dryers - Freestanding Automatic Dryers - Automatic Dryers - Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Machines - Freestanding Machines - Built-in Automatic Washing Machines - Freestanding Machines - Semi-Automatic Washing Machines - Freestanding Automatic Washing Machines - Freestanding Machines - Freestanding Machines - Freestanding Machines - Freestanding Large Cooking Appliances - Fireestanding Large Cooking Appliances - Built-in Hobs		Dat	ta removed fr	rom sample		

 Ovens Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods Cookers Range Cookers Microwaves Built-in Microwaves Freestanding Microwaves Freestanding Microwaves Built-in Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freestanding Freezers Built-in Freezers Freezers Freestanding Freezers Freestanding Freezers Built-in Freezers Built-in Fridge 	Data removed from sample
Built-in Freezers Freestanding Freezers	
Freestanding Fridge Freezers	
- Fridges Built-in Fridges Freestanding Fridges	

Table 22Sales of Major Appliances by Category and Built-in/Freestanding Split: %Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Built-in Automatic Dryers - Freestanding Automatic Dryers - Automatic Washer Dryers - Built-in Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Automatic Washing Machines - Built-in Automatic Washing Machines	[Data removed from s	ample

 Freestanding Automatic Washing Machines Semi-Automatic Washing Machines Large Cooking Appliances Built-in Large Cooking Appliances Freestanding Large Cooking Appliances Built-in Hobs Ovens Cooker Hoods Freestanding Cooker Hoods Cookers Range Cookers Microwaves Built-in Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/Chillers Freestanding Freezers Freestanding Freezers Freestanding Freezers Freestanding Freezers Fridge Freezers Fridge Freezers Fridges Built-in Fridges Fridges Built-in Fridges Fridges Fridges Fridges Fridges Fridges Fridges Fridges 	Data removed from sample
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Table 23Sales of Major Appliances by Category and Built-in/Freestanding Split: % ValueGrowth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Automatic Dryers - Built-in Automatic Dryers - Freestanding Automatic Dryers - Automatic Washer Dryers - Built-in Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Automatic Washing Machines - Built-in Automatic Washing Machines - Freestanding Automatic Washing Machines - Semi-Automatic Washing Machines Large Cooking Appliances	ſ	Data removed from s	ample

 Built-in Large Cooking Appliances Freestanding Large Cooking Appliances Built-in Hobs Ovens Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods Cookers Range Cookers Microwaves Built-in Microwaves Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/Chillers Freestanding Freezers Freezers Built-in Freezers Freestanding Freezers Fridge Freezers Fridge Freezers Fridge Freezers Fridge Freezers Fridges Built-in Fridges Freestanding Fridges 	Data removed from sample
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Table 24 Sales of Small Appliances by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners		Data	removed fro	om sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Small Appliances by Category: Value 2018-2023

INR million	2018	2019	2020	2021	2022	2023
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances		Data	removed fro	m sample	_	

Small Co	I Care Appliances ooking Appliances Cleaners	Data removed from sample
Source:	Euromonitor International from o store checks, trade interviews, tr	fficial statistics, trade associations, trade press, company research, ade sources

Table 26 Sales of Small Appliances by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners	D	ata removed from sa	imple

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Small Appliances by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners	C)ata removed from sa	Imple

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 NBO Company Shares of Major Appliances: % Volume 2019-2023

% retail volume Company		2019	2020	2021	2022	2023
	Data	removed from	sample			

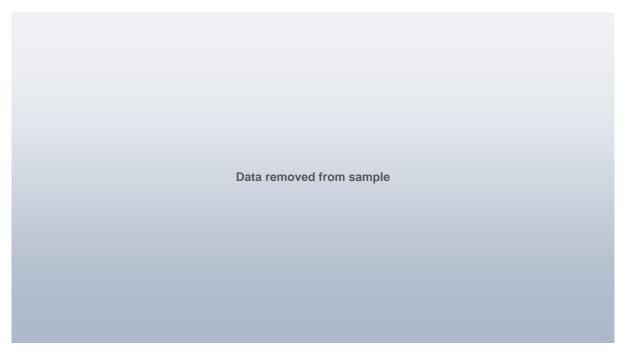


Table 29 LBN Brand Shares of Major Appliances: % Volume 2020-2023

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
	Data removed f	from sample			

	Data removed from sample
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 NBO Company Shares of Small Appliances: % Volume 2019-2023

% retail volume Company	2019	2020	2021	2022	2023
Data rer	noved from s	ample			

	Data removed from sample
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 LBN Brand Shares of Small Appliances: % Volume 2020-2023

% retail volume					
Brand (GBO)	Company (NBO)	2020	2021	2022	2023

Data removed from sample

Table 32 Distribution of Major Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels - Retail Offline Grocery Retailers Convenience Retail Supermarkets Hypermarkets Uscounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Department Stores Department Stores Variety Stores Apparel and Footwear Specialists Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Health and Beauty Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Non-retail channels - Builder Merchants and Construction Total			a removed f			

Euromonitor International from official statistics, trade associations, trade press, company research, Source: store checks, trade interviews, trade sources Others includes sales from door to door selling, warehouse clubs etc

Note:

Table 33 Distribution of Small Appliances by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels - Retail Offline Grocery Retailers		Dat	a removed fr	om sample	_	

 Convenience Retail Supermarkets Hypermarkets Discounters Warehouse Clubs Food/drink/tobacco specialists Small Local Grocers Non-Grocery Retailers General Merchandise Stores Department Stores Department Stores Apparel and Footwear Specialists Apparel and Footwear Specialists Appliances and Electronics Specialists Home Products Specialists Leisure and Personal Goods Specialists Other Non-Grocery Retailers Vending Direct Selling - Retail E-Commerce Non-retail channels - Builder Merchants and Construction Total 	Data removed from sample
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Source:Euromonitor International from official statistics, trade associations, trade press, company research,
store checks, trade interviews, trade sourcesNote:Others includes sales from door to door selling, warehouse clubs etc

Table 34 Forecast Sales of Consumer Appliances by Category: Volume 2023-2028

'000 units		2023	2024	2025	2026	2027	2028
Consumer Ap Major Appliar Small Appliar	nces	_	Data	removed fr	om sample	_	
	pmonitor International from e checks, trade interviews,	,	ade associations	, trade press, co	ompany research	٦,	

Table 35 Forecast Sales of Consumer Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Consumer Appliances Major Appliances Small Appliances	_	Data	removed fro	om sample		

Table 36Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Consumer Appliances	4.9	5.0	27.9
Major Appliances	5.0	5.2	28.8
Small Appliances	4.9	5.0	27.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Consumer Appliances Major Appliances Small Appliances	Da	ata removed from sa	mple
Source: Euromonitor International from official statistics trade assoc	viations trade pre-	ss company research	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split:Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Automatic Dryers - Freestanding Automatic Dryers - Automatic Dryers - Automatic Dryers - Automatic Washer Dryers - Built-in Automatic Washer Dryers - Freestanding Automatic Washer Dryers		Data	a removed fro	om sample		

- Automatic Washing	
Machines	
Built-in Automatic	
Washing Machines	
Freestanding	
Automatic Washing	
Machines	
- Semi-Automatic	
Washing Machines	
Large Cooking Appliances	
- Built-in Large	
Cooking Appliances	
- Freestanding Large	
Cooking Appliances	
- Built-in Hobs	
- Ovens	
- Cooker Hoods	
Built-in Cooker Hoods	
Freestanding Cooker	
Hoods	
- Cookers	
- Range Cookers	
Microwaves	
- Built-in Microwaves	
- Duit-III WIGIOWaves	Data removed from sample
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 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freestanding Electric Wine Coolers/ Chillers Freestanding Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Freezers Built-in Freezers Freestanding Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Freestanding Freezers Fridge Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Freestanding Freezers Fridge Freezers Built-in Fridge 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Freezers Built-in Freezers Fridge Freezers Built-in Fridge Freezers Built-in Fridge Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Freestanding Freezers Fridge Freezers Built-in Fridge Freezers Freezers Fridge Freezers Freezers Friezers Friezers Friezers Friezers Freezers Friezers Friezers Freezers Freezers Freezers Freezers Freezers Freezers Freezers Freezers Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Fridge Freezers Fridge Freezers Built-in Fridge Freezers Freestanding Fridge Freezers Freestanding Fridge Freezers 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Fridge Freezers Fridge Freezers Freestanding Fridge Freezers Freestanding Fridge Freezers Freestanding Fridge Freezers Freestanding Fridge Freezers Freestanding Fridge Freezers Fridges 	Data removed from sample
 Freestanding Microwaves Refrigeration Appliances Built-in Refrigeration Appliances Freestanding Refrigeration Appliances Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/ Chillers Freezers Built-in Freezers Freestanding Freezers Fridge Freezers Built-in Fridge Freezers Freestanding Fridge Freezers 	Data removed from sample

Passport 25

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 39Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split:Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Major Appliances Built-In Major Appliances		Dat	a removed fr	om sample		

Freestanding Major	
Appliances	
Dishwashers	
- Built-in Dishwashers	
- Freestanding	
Dishwashers	
Home Laundry Appliances	
- Built-in Home Laundry	
Appliances	
- Freestanding Home	
Laundry Appliances	
 Automatic Dryers Built-in Automatic 	
Dryers	
Freestanding	
Automatic Dryers	
- Automatic Washer Dryers	
Built-in Automatic	
Washer Dryers	
Freestanding	
Automatic Washer Dryers	
- Automatic Washing	
Machines Built-in Automatic	
Washing Machines	
Freestanding	
Automatic Washing	
Machines	
- Semi-Automatic	
Washing Machines	Data removed from sample
Washing Machines Large Cooking Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Built-in	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods Built-in Cooker Hoods Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Refrigeration Appliances	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Built-in Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Ovens - Cooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Built-in Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers Built-in Electric	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Cooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Built-in Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers - Built-in Electric Wine Coolers/Chillers	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Ooker Hoods - Ooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Ooker Hoods - Ooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/	Data removed from sample
Washing Machines Large Cooking Appliances - Built-in Large Cooking Appliances - Freestanding Large Cooking Appliances - Built-in Hobs - Ovens - Ooker Hoods - Ooker Hoods - Built-in Cooker Hoods - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Freestanding Refrigeration Appliances - Electric Wine Coolers/ Chillers Built-in Electric Wine Coolers/Chillers Freestanding	Data removed from sample

- -- Built-in Freezers
- -- Freestanding Freezers

 Fridge Freezers Built-in Fridge Freezers Freestanding Fridge Freezers Fridges Built-in Fridges Freestanding Fridges 	Data removed from sample		
Source: Euromonitor International from trade associations trade press, company research, trade interviews			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 40Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split:% Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers Built-in Dishwashers Freestanding Dishwashers Home Laundry Appliances Built-in Home Laundry Appliances Freestanding Home Laundry Appliances Freestanding Home Laundry Appliances Automatic Dryers Freestanding Automatic Dryers Automatic Washer Dryers Built-in Automatic Washer Dryers Freestanding Automatic Washer Dryers Built-in Automatic Washer Dryers Freestanding Automatic Washer Dryers Built-in Automatic Washer Dryers Freestanding Automatic Washer Dryers Built-in Automatic Washing Machines Built-in Automatic Washing Machines Built-in Automatic Washing Machines Semi-Automatic Washing Machines Semi-Automatic Washing Machines Built-in Large Cooking Appliances Built-in Hobs Ovens Cooker Hoods Freestanding Cooker Hoods Cookers Built-in Microwaves Freestanding Microwaves Refrigeration Appliances Freestanding Microwaves Refrigeration Appliances Freestanding Refrigeration Appliances Freestanding Refrigeration Appliances Built-in Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/Chillers Freestanding Electric Wine Coolers/Chillers Freestanding Freezers Friegerating Freezers Friedge Freezers Friedge Freezers		Data removed from s	ample

 Built-in Fridge Freezers Freestanding Fridge Freezers Fridges Built-in Fridges Freestanding Fridges Source: Euromonitor International from trade associations, trade pretrade sources Table 41 Forecast Sales of Major Appliances by Ca % Value Growth 2023-2028			
% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Major Appliances Built-In Major Appliances Freestanding Major Appliances Dishwashers - Built-in Dishwashers - Freestanding Dishwashers Home Laundry Appliances - Built-in Home Laundry Appliances - Freestanding Home Laundry Appliances - Automatic Dryers - Freestanding Automatic Dryers - Automatic Washer Dryers - Built-in Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Freestanding Automatic Washer Dryers - Automatic Washing Machines - Freestanding Automatic Washer Dryers - Automatic Washing Machines - Freestanding Automatic Washing Machines - Built-in Automatic Washing Machines - Freestanding Automatic Washing Machines - Built-in Automatic Washing Machines - Built-in Automatic Washing Machines - Semi-Automatic Washing Machines - Freestanding Large Cooking Appliances - Built-in Large Cooking Appliances - Built-in Cooker Hoods - Cookers - Semi-Microwaves - Freestanding Cooker Hoods - Cookers - Range Cookers Microwaves - Built-in Microwaves - Freestanding Microwaves Refrigeration Appliances - Built-in Refrigeration Appliances - Freestanding Freezers - Fridge Freezers - Fridge Freezers - Fuilt-in Fridge Freezers - Fuilt-in Fridge Freezers - Free		Data removed from sa	mple

-- Freestanding Fridge Freezers - Fridges

-- Built-in Fridges -- Freestanding Fridges Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Sales of Small Appliances by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners		Data	removed fro	m sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 43 Forecast Sales of Small Appliances by Category: Value 2023-2028

INR million	2023	2024	2025	2026	2027	2028
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners		Data	removed fro	om sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 44 Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners		Data removed from s	sample
Courses Europenitor International from trade appositional trade press		acarab trada interviewa	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 45 Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Small Appliances Air Treatment Products Food Preparation Appliances Heating Appliances Irons Personal Care Appliances Small Cooking Appliances Vacuum Cleaners	Da	ta removed from sar	nple
Sources Europenitor International from trade appaaintional trade prop		arch trada interviews	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast and scenario closing date: 30 October 2023

Report closing date: 12 February 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during research include the following:

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		Content removed from sample
Source:	Euromonitor International	

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