

MAJOR DOMESTIC APPLIANCES – GERMANY – 2023

A slowing housing market and squeezed budgets threaten the market while high energy prices make efficiency a focus as consumers look for ways to save money.



A Mintel Analyst, Global Analyst



Major Domestic Appliances – Germany – 2023

This report looks at the following areas:

- The impact of the cost-of-living crisis on the major domestic appliances market
- Major domestic appliances purchased in the past three years and most recently
- Most recent major domestic appliances purchased, with Bosch in pole position
- Channels used to buy major domestic appliances, with online taking the lead
- Reasons for preferring a retailer over another when shopping for major domestic appliances, including affordable prices, fast delivery and after-sale services
- Interest in and willingness to pay more for major domestic appliance innovations, with energy-efficient features being most popular



A slowing housing market and squeezed budgets threaten the market while high energy prices make efficiency a focus as consumers look for ways to save money.

Overview

Major domestic appliance sales **peak at 80% for couples with children aged under 45** who also have the most varied repertoire of appliances purchased. Targeting these consumers will be important as couples with children **are among those with the highest household incomes**. As **affordable prices are the most important factor** when deciding where to shop, rental services can offer a way to **ease the burden of having to purchase big ticket items**.

The **pandemic-boosted ecommerce** and online demand remain elevated – **52%** of major domestic appliance purchases are made online. **At 39%, fridges/freezers are the most**

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purchased appliance. Across categories, Bosch takes the lead among major domestic appliance brands purchased.

Energy efficiency has moved into the spotlight – 48% of major domestic appliances shoppers are interested in and would pay more for energy-efficient features. Brands should use technology to enhance consumers' **control over their energy consumption** (eg Samsung's Smart Things Energy function).

Willingness to pay for space-saving designs peaks at 47% of Gen Zs and sinks to 10% of Baby Boomers. As consumers have less space to accommodate various different products, they increasingly seek multipurpose products such as BORA cooktop extractors.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for major domestic appliances

Market context

- High inflation leads to a focus on value
- Sharply rising interest rates slow the property market and squeeze household budgets
- The pandemic brought spend forward which is now missing
- Urbanisation and housing shortage demand space-saving multipurpose designs
- Inflation is testing consumers' eco ambitions

Mintel predicts

- Market size & forecast

Opportunities

- Capitalise on the flexibility and sustainability of rental services
- Leverage technology to support consumers in managing their energy consumption
- Cater to young consumers and city dwellers with multipurpose designs
- Promote the health benefits of silent appliances

MARKET DRIVERS

The German economy

- The German economy slips into a technical recession
 - Graph 1: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

The impact of the economy on the major domestic appliances sector

- After soaring in 2022, energy prices in Germany remain high
 - Graph 2: development of overall consumer price index and energy prices, 2020-2023
- Skyrocketing energy prices boost demand for energy-efficient appliances
- The cost-of-living crisis demands greater focus on value

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Housing market

- Rising interest rates hit the property market
 - Graph 3: year on year change in the number of mortgage agreements, 2020–23
- Budgetary burdens force consumers to postpone spending on the home
 - Graph 4: consumer spending* on home and garden products (eg furniture, domestic appliances etc) compared to the last 12 months, 2022–23
- A growing population and increasing urbanisation drives demand for living space
 - Graph 5: share of urban population as percentage of total population, 2020–21
 - Graph 6: population growth*, 2017–22
- Living space in Germany differs largely with age and household size
 - Graph 7: living space per person, by age groups*, 2023

Sustainability

- Environmental consciousness demands quality and longevity...
- ...but multiple crises challenge consumers' eco-ambitions
 - Graph 8: change in share of consumers* trying to act in a way that is not harmful to the environment, 2021–23

Demographic change

- A declining working-age population poses challenges
 - Graph 9: projected population development, 2020–2035
- An ageing population forces brands to adapt

MARKET ACTIVITY

Sector size and forecast

- The German major domestic appliances market stagnated in 2022
- Major domestic appliance sales surged during the pandemic
- The market is taking a hit as consumers brought forward purchases during the pandemic...
- ...and continues in the aftermath of the cost-of-living crisis
- Growth curve flattens after substantial growth during the pandemic
 - Graph 10: major domestic appliances sales, 2017–22

Online

- Online supersedes in-store as most used purchase channel for major domestic appliances
 - Graph 11: purchase channels used to buy the major domestic appliance most recently purchased – NET, 2023
 - Graph 12: purchase channels used to buy the major domestic appliance most recently purchased, 2023
- Online sales of household goods and appliances remain high
 - Graph 13: development of value sales of household goods and appliances sold online, 2018–22
- Online is first choice across all segments

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- Use emerging technologies to further boost e-commerce

WHAT CONSUMERS WANT AND WHY

Major domestic appliance purchases

- A third of German consumers bought a washing machine in the last three years
 - Graph 14: major domestic appliances purchased in the past three years, 2023
- Fridges/freezers dominate among white goods purchases
- Fridges/freezers dominate white goods purchases
- Millennials are most active in the major domestic appliance sector
 - Graph 15: major domestic appliances purchased in the last three years, by generation, 2023
- Engage with older consumers
- Young families have the most varied repertoire
 - Graph 16: repertoire of major domestic appliances purchased in the past three years, 2023
- Couples with children drive major domestic appliance purchases
 - Graph 17: major domestic appliances purchased in the last three years, by lifestage and age, 2023
- One in five consumers bought a washing machine most recently
 - Graph 18: most recent major domestic appliances purchased, 2023

Brands purchased

- Bosch takes the lead among major domestic appliance brands purchased
 - Graph 19: major domestic appliance brands purchased, 2023
- Samsung secures top spot among Millennials
 - Graph 20: major domestic appliance brands purchased, by generation, 2023
 - Graph 21: major domestic appliance brands purchased, by income, 2023
- Bosch leads among laundry brands
 - Graph 22: brand of washing machine/tumble dryer purchased most recently, 2023
- Brand preference for fridges/freezers is less pronounced
 - Graph 23: brand of fridge/freezer purchased most recently, 2023
- Bosch and Siemens are the leading brands in the dishwasher segment
 - Graph 24: brand of dishwasher purchased most recently, 2023
- Bosch and AEG take the lead in the cookers segment
 - Graph 25: brand of cooking appliance purchased most recently, 2023

Retailer preferences

- Emphasise service quality to German consumers looking to save money when buying major domestic appliances
 - Graph 26: reasons for preferring a retailer over another when shopping for major domestic appliances, 2023
- Promote the flexibility of rental services to appeal to younger consumers
- Leverage the sustainability of rental services

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- Accelerate deliveries to draw Baby Boomers in
 - Graph 27: preference for fast delivery of major domestic appliances, by generation, 2023
- Focus on after-sale services to incentivise trading-up
- Focus on human services to tap into the Baby Boomer market
 - Graph 28: reasons for preferring a retailer over another when shopping for major domestic appliances by generation, 2023
- Create superior in-store customer experiences
- Deliver on service, speed and value to attract the highest number of consumers
- Demonstrate value by providing outstanding service during and after purchase

Interest in major domestic appliance innovations

- Energy-efficient features come to the fore as energy prices soar
 - Graph 29: interest in major domestic appliance innovations, 2023
- Help consumers to take responsibility for their energy consumption
- Samsung shows how to use SmartThings to save energy
- Promote benefits of silent appliances for health and sleep
 - Graph 30: interest in appliances with low noise levels, by generation, 2023
- Leverage younger consumers' interest in convenient innovations
- Promote convenience and simplicity to appeal to younger consumers
- Leverage interest in technological innovations to appeal to Gen Zs
 - Graph 31: interest in and willingness to pay for technological innovations in the major domestic appliances sector, by generation, 2023
- Prove value of technological advances to increase willingness to pay
 - Graph 32: interest but no willingness to pay for technological innovations in the major domestic appliances sector, by generation, 2023
- Provide space-saving multipurpose products to suit those with limited living space
 - Graph 33: interest in space-saving designs, by generation, 2023

LAUNCH ACTIVITY AND INNOVATION

Launch activity and innovation

- Miele's CombiSteam Oven
- CombiSteam Oven combine advantages in terms of health and taste
- BORA X BO Flex Oven
- LG MoodUP refrigerators
- Samsung's Bespoke 4-Door Flex with Family HubTM+

Advertising and marketing activity

- BlueMovement promotes its subscription service for major domestic appliances

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- Bosch showcases the company's sustainability efforts as part of its #LikeABosch brand campaign
- Samsung showcases the smart use cases possible with the Family Hub+ refrigerator
- Consumers can control their major domestic appliances from BSH with the Home Connect app
- BORA's cooktop extractors

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology and language usage

- Products covered in this Report
- Generations
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – TURF analysis methodology

- TURF analysis methodology

Appendix – repertoire analysis methodology

- Repertoire analysis methodology

Appendix – market size and forecast (if applicable)

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value

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