

## Press release

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### **Small Domestic Appliances market grows to €24.3 billion in first half of 2019**

**Nuremberg, September 4, 2019 – Demand for small domestic appliances (SDA) continued to grow during the first half of 2019. The global market (excluding North America) showed growth with an overall increase of 9.3 percent delivering a total market value of €24.3 billion. GfK expects an SDA global sales growth of 9.4 percent for the full year of 2019. These are GfK's findings for the global SDA market to be released at IFA 2019 in Berlin.**

A few segments are the primary drivers of the SDA market and represent a significant share of the growth dynamic. The top five segments (vacuum cleaners, food preparation, hot beverage makers, air treatment and shavers) contribute almost 50 percent of the SDA category. Over 23 percent of global growth is attributed to vacuum cleaners. The strongest growth region has been APAC, particularly the Emerging Asia\* region. Sales in APAC increased by 21 percent to €5.8 billion in the first half of 2019 compared to the same period last year. Product categories such as cordless handstick vacuum cleaners (+27 percent), robot vacuum cleaners (+18 percent), air treatment (+19 percent) and water filters (+14 percent), are primarily responsible for this growth.

#### **Simplicity and convenience becoming more important for consumers**

Over half (52 percent) of global consumers agree with the statement “I am always looking for ways to simplify my life” (GfK Consumer Life), and this trend is growing. The topics of simplicity and convenience are becoming increasingly important for SDA success.

In floor cleaning, **cordless handstick vacuum cleaners** are at the top of product lifecycle curve. At present, the focus is on performance over simplicity to differentiate in the sector. The sales growth trajectory of **cordless vacuum cleaners** is slowly plateauing after massive growth in 2018. Sales volume is now over €2.3 billion (+27 percent).

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Robots are yet another segment contributing to vacuum cleaner category growth. The sale of **robot vacuum cleaners** grew (+18 percent), and nearly 70 percent of these are smart devices.

Convenience segments like wet and dry vacuum cleaners, which make additional wet wiping redundant, are also growing (+13 percent) globally. The most important markets for this new type of wet cleaner are China (€39.6 million), followed by Germany (€22.1 million), France (€21.8 million) and Brazil (€19.4 million).

**Hot beverage makers** are another major SDA category growing at 11 percent in terms of value. Much of this growth is owing to the sales of Espresso Full Automatic machines, which is growing at 18 percent in terms of value.

**Nevin Francis, GfK expert for the SDA industry says:** “Increasingly consumers want to mirror their identity and aspirations via their possessions. We have seen this in our GfK Consumer Life study where more survey respondents are agreeing with the statement “It is important to indulge or pamper myself on a regular basis”. While handstick rechargeable and robot vacuum cleaners offer premium feel and indulgence, personal care product segments are a prime example of the “Pamper Me” attitude. For instance, sales of premium hairdryers and hair stylers are skyrocketing. Owning a premium and branded version of a commoditized product adds value for aspirational consumers. Hence, revenues from segments like hair stylers grew by over 100 percent during the first half of 2019.”

### **Solutions addressing pollution and climate change generate value**

Wellbeing is an increasingly popular topic among consumers, as the prevalence of fitness trackers and apps confirm. In the kitchen, **liquidizers** for fruit and vegetables are in high demand. Although initially driven by Europe and LATAM, APAC and MEA now show a high adoption of this product group. Globally the category is growing (+18 percent) in value, achieving an overall revenue of €1.02 billion during the first half of 2019.

With air and water pollution are affecting many cities, a growing awareness about allergies, pollution and climate change are making consumers more concerned about the quality of air they breathe and the water they drink. As a result, sales of **air cleaning segment** within air treatment category generated sales of €1.3 billion in the first half of 2019, making them an important driver of the SDA market. Sales of **water filters** reached €0.9 billion sales in the same period. Much of this expansion is been driven by APAC, especially China. Nearly half of air cleaning and water filter market revenues originate here.

### **Connected SDA appliances - Slow but steady**

Connectivity continues to be important for some product categories in the SDA market. Smart appliances are usually equated with simplicity and high performance so adoption barriers like lack

of interoperability, concerns about data privacy and absence of convincing use cases prevent their growth. The value-based market share of relevant smart product segments (within SDA) increased by a considerable amount to €1.7 billion (+42 percent) during the first half of 2019 compared to the previous year. The smart products sales jump was mainly triggered by high sales of **smart robot vacuums** (+44 percent) and **smart air treatment devices** (+38 percent) compared to the same period last year. With these growth rates, the market size of smart vacuum cleaning robots (+71 percent) is bigger when compared to the non-smart ones (29 percent).

Ends

### Notes to Editors

\* China, India, Malaysia, Thailand, Vietnam, Indonesia.

GfK collects point-of-sales data worldwide on small domestic appliances for home comfort products, hot beverage makers, kitchen appliances and personal care products through its retail panels. For the global market, excluding North America, this evaluation is based on information from 79 countries for the first half of 2019. All turnover figures in this press release is based on a fixed currency exchange rate.

During IFA 2019, GfK will be publishing press releases relating to IT, TV, Smartphones, Audio, Small Domestic Appliances, Major Domestic Appliances, Smart Home, Borderless Shopping and the Technical Consumer Goods Market. More information is available at <https://www.gfk.com/press-room/>.

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### Meet GfK at IFA in Berlin, September 6 - 11, 2019:

Come and chat with our experts at IFA NEXT Hall 26 and in the GfK office at the IFA (Level 4, VIP2, Großer Stern)

### About GfK

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