Consumer Appliances - Vietnam

Euromonitor International : Country Market Insight

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CONSUMER APPLIANCES IN VIETNAM

EXECUTIVE SUMMARY

Robust Economic Recovery Underpins Positive Market Performance in 2010

Vietnam's rapid recovery from the global economic downturn underpinned a strong performance by the consumer appliances market in 2010. Volume and current value growth rates for the market as a whole exceeded those recorded in 2009, while most individual product categories saw growth rates recovery quickly from the slowdown experienced the previous year. The launch of more sophisticated and expensive models breathed new life into more mature categories, while niche products enjoyed rising penetration as living standards improved and consumers placed a greater emphasis on luxury and convenience.

Average Unit Prices Rise As Consumers Trade Up To New Models

Most consumer appliance categories experienced moderate to high growth in average unit prices in 2010. This was mainly due to consumers trading up to new and more expensive models, a trend made possible by economic recovery and rising disposable incomes. While manufacturers and retailers did offer promotional discounts on more mature or basic products, this was not enough to halt the overriding trend of rising prices.

Luxury and High-end Consumer Appliances Become More Popular

Although they only represented a small share of total market volume and current value sales in 2010, luxury and high-end consumer appliances proved increasingly popular in Vietnam towards the end of the review period. They look set to become even more popular over the forecast period as the number of middle and higher income consumer in the country continues to rise in line with economic development and urbanisation. New launches and promotional activities by manufacturers and retailers will also help to increase demand for more sophisticated and expensive products across the consumer appliances market.

Energy Saving Becomes A More Influential Factor in Purchasing Decisions

Energy conservation is an ongoing concern in the Vietnamese economy. Electricity shortages remained a common problem during the review period, despite consistent price increases by Electricity of Vietnam (EVN), the only electricity supplier in the country. In 2010, the effects of this were evident in rising demand for energy saving consumer appliances. Consumers are increasingly looking out for energy saving labels when buying appliances, with the amount of electricity a product uses becoming a more important factor in purchasing decisions.

Market Outlook Remains Bright Thanks To Positive Economic Forecast

The outlook for the Vietnamese consumer appliances market remains bright, with most product categories expected to perform well over the forecast period. Niche products should continue to enjoy rising household penetration, while those approaching maturity will benefit from the introduction of more sophisticated luxury models. All of this will be underpinned by economic growth and rapid urbanisation. While household penetration of consumer appliances will remain highest in big cities, it will continue to rise in smaller towns and rural areas as the benefits of economic development are felt across Vietnam.

KEY TRENDS AND DEVELOPMENTS

Demand for Consumer Appliances Rises in Line With Economic Recovery

Due to Vietnam's low integration with the global financial system, its economy was not nearly as badly affected by the global economic crisis as some neighbouring countries. In 2010, this was clearly visible in the speed and strength of economic recovery in Vietnam. Most notably, GDP growth reached 6.5%, compared to growth rates of 5.32% in 2009 and 6.23% in 2008.

Economic recovery in 2010 was accompanied by growth in consumer confidence and spending. In the consumer appliances market, this ensured that most product categories saw volume and current value growth rates bounce back quite strongly from the slowdown experienced the previous year.

Current Impact

In the wake of the economic crisis, many employees in Vietnam had their incomes reduced or their end-of-year bonuses cancelled in 2009. This continued to have a slightly negative impact on the performance of the consumer appliances market in the first quarter of 2010. From the second quarter on, however, the market recovered quickly as economic conditions improved and consumer confidence strengthened. Continuous discounts and promotions by retailers also contributed to growth in demand for consumer appliances.

Major appliances, especially those in more mature categories, were worse affected by the economic downturn than small appliances in 2009. As a result, the positive effects of economic recovery were most visible in the performances of major appliance categories. For example, having slumped to 10% in 2009, growth in volume sales of freestanding fridge freezers jumped to 23% in 2010.

Outlook

According to the World Bank, the acute phase of the financial crisis has passed and a global economic recovery is underway. This recovery remains fragile, however, and global economic growth will continue to be slow during the first half of 2011 as the initial positive effects of stimulus packages wane and governments in several countries introduce tougher austerity measures. Vietnam is in a better position than many countries, including neighbouring nations, due to its low integration with the global financial system. As a result, it is expected to continue experiencing robust economic growth over the forecast period. Optimistic predictions should be taken with caution, however, given the fragility of the global recovery and concerns about high inflation and the fast pace of credit expansion within the Vietnamese economy.

Future Impact

Economic development, urbanisation, rising income levels and improvements in living standards will continue to underpin the positive development of the consumer appliances market in Vietnam over the forecast period. That said, as the Vietnamese economy gradually becomes more integrated with the global economic and financial system, it is becoming increasingly vulnerable to negative international and regional developments. While this does pose risks, it also has benefits in terms of the potential for economic growth and demand for consumer appliances in Vietnam. Moreover, it also ensures that manufacturers, retailers and consumers in Vietnam have greater exposure to new international trends and developments in consumer appliances.

Internet Retailing Emerges As A Distribution Channel for Consumer Appliances

2010 was a dynamic year for the development of internet retailing in the Vietnamese consumer appliances market. Although there were many popular online shopping websites established in Vietnam during the review period, most operated on consumer-to-consumer platform, and only a few offered consumer appliances. In 2010, however, several major electronics and appliance specialist retailers, including Nguyen Kim Saigon Shopping Centre and Thien Hoa, launched their own online shopping websites, marking the official entry of formal internet retailers into the consumer appliances market.

The rise of internet retailing websites in Vietnam is attributable to a number of factors. Firstly, the number of internet savvy urban consumers who like to research products and compare prices before buying increased steadily throughout the review period. For retailers, including electronics and appliance specialist retailers, the development of an online presence provides a more effective way of targeting such consumers and informing them about new launches, promotional deals etc. Secondly, the expansion of the Vietnamese finance industry has also made it easier for retailers to sell products online. In particular, growth in the issuing of financial cards (credit cards, debit cards etc), together with the establishment of third party payment operators like Payoo and Mobivi, has paved the way for the development of internet retailing.

Current Impact

The formal emergence of internet retailing as a new distribution channel had a positive impact on the development of the consumer appliances market in 2010. Many Vietnamese consumers have already established the habit of going online and viewing internet retailing websites to compare prices and check out promotional deals before physically going to retail outlets to make purchases.

Despite this, the share of total consumer appliances current value sales represented by internet retailing remained negligible at the end of 2010. This was partly due to the conservatism of Vietnamese consumers, with many still preferring to visit store-based outlets to view and handle products for themselves before deciding whether or not to make a purchase. Moreover, despite the rapid development of the domestic finance industry, many consumers are still reluctant to give out their credit or debit card details online for fear of falling victim to fraud or identity theft. Incidents of fraud and identity theft linked to the internet were widely reported in the Vietnamese media towards the end of the review period.

Outlook

As internet retailing in general is still at a nascent stage of its development in Vietnam, online sales of consumer appliances are expected to grow strongly in volume and current value terms over the forecast period. Convenience will be one of the key factors driving online demand. In addition, more shoppers are expected to use the internet as a means of researching products and comparing prices before purchasing consumer appliances from conventional store-based retailing outlets. Retailers meanwhile are expected to make greater use of the internet as a promotional tool to inform consumers about new launches, payment plans, discount deals etc.

Major electronics and appliance specialist retailers like Nguyen Kim Saigon Shopping Centre and Pico Plaza will play a leading role in development of the internet as a distribution channel for consumer appliances. These specialist retailers already carry huge product assortments, which makes their websites a convenient one-stop option for consumers to compare prices and research different models. However, if the internet is to become a significant distribution channel within the consumer appliances market, such specialist retailers will have to work with finance companies to reassure shoppers about the security and trustworthiness of online transactions.

Future Impact

As internet retailing develops in Vietnam, retailers and manufacturers of consumer appliances are expected to develop new online strategies. For example, in order to boost transactions on their internet retailing websites, electronics and appliance specialist retailers may begin offering special online promotions and discounts that are not available to consumers who make purchases in their store-based outlets. Manufacturers meanwhile are likely to try and develop stronger relationships with online retailers in order to gain a competitive advantage over their rivals. Aside from using internet retailing websites to promote their brands, manufacturers could offer online retailers exclusive distribution deals on certain products, for example. For retailers and manufacturers alike, one of the main attractions of internet retailing is that while the initial investment and operating costs are relatively low, margins tend to be quite high.

Growing Trend Towards Energy Saving Appliances Evident in 2010

A growing trend towards energy saving consumer appliances was clearly evident in 2010. While the energy saving concept and products with this feature were not new to Vietnam, various factors ensured that they gained increasing attention within the market during the course of the year. Firstly, continuous increases in the cost of electricity and clean water over the review period left households with escalating utility bills. Together with the economic crisis in 2009, this led consumers to try and find ways of reducing their bills in the long term. One way to do this is to choose energy saving appliances instead of normal appliances. While the former may be slightly more expensive, in the long run they can save money on utilities for consumers.

Towards the end of the review period, the Vietnamese government introduced a number of initiatives to raise consumer awareness of energy saving and environmental issues. For example, the Ministry of Industry and Trade set up a website to promote energy saving practices (http://tietkiemnangluong.com.vn). This website is continuously updated with news and tips on energy saving and environmental issues. Major cities like Ha Noi and Ho Chi Minh City also have their own websites to promote energy saving among residents and inform them of local developments relating to this issue.

Current Impact

Rising demand led many consumer appliance manufacturers to step up marketing and advertising activities for their energy saving models in 2010. Products that claimed to reduce electricity or water consumption by anything from 20% to 50% were widely advertised; some even claimed to use more than 50% less electricity than standard models. All of this created confusion among consumers about which products could deliver real energy and water savings, and which were simply making false advertising claims.

As a result, the Ministry of Industry and Trade announced that new regulations will be introduced to make energy efficiency rating labels compulsory for all consumer appliances sold in Vietnam by 2013. The ministry also encouraged manufacturers to apply for energy rating labels before the new regulations are enforced, so as to reduce confusion among consumers and help them to make more informed choices.

Outlook

As of late 2010, not all manufacturers had followed the recommendations of the Ministry of Industry and Trade by placing energy rating labels on their products. Despite this, consumers continued to seek out more energy efficient appliances in an effort to reduce their utility bills. More savvy consumers conducted their own research into different energy saving technologies to determine which products were most effective and which were simply making unrealistic claims in advertisements.

At the end of 2010, state-owned company EVN, which has a monopoly on electricity supply in Vietnam, announced that further price increases would be imposed in 2011. Due to ongoing electricity and water shortages, it is likely that prices will continue to rise after 2011. Accordingly, demand for energy saving appliances is expected to continue growing strongly over the forecast period.

Future Impact

In the long term, energy saving products will continue to make gains at the expense of standard models, especially in major appliance categories like air conditioners, refrigeration appliances, and home laundry appliances. Given their capacity to bring about significant reductions in household utility bills, energy saving appliances will increasingly become a necessity rather than a choice.

Under the plan recently announced by the Ministry of Industry and Trade, by 2013 all consumer appliances sold in Vietnam will have to carry energy rating labels. This will create a new standard for the market, as manufacturers will compete to provide the most energy efficient products at the lowest possible prices. Manufacturers that take the initiative and introduce energy rating labels before they become compulsory in 2013 could gain a competitive advantage over their rivals and strengthen the image of their brands among consumers.

Appliances With Health Protection Technologies Prove Increasingly Popular

During the review period, outbreaks of deadly diseases like H1N1 (swine flu), H5N1 (bird flu) and cholera were a regular feature of life in Vietnam. There was also increasing public concern over the health risks posed by bacteria, food poisoning and the widespread use of pesticides and other potentially dangerous agents in food production. All of this led to rising health consciousness among consumers. Consumer appliance manufacturers were quick to respond to this trend, launching new products that can help to prevent or reduce the spread of bacteria and infection.

Current Impact

Towards the end of the review period, manufacturers continued to introduce air conditioners and home laundry appliances that can help to kill dangerous viruses, as well as refrigeration appliances that can prevent and kill bacteria while also preserving the freshness of food. The response to such products was overwhelmingly positive, with consumers actively seeking out products with health-related technologies like Nano Silver or Hybrid Plasma, which claim to kill harmful bacteria. Health protection became an increasingly influential factor in purchasing decisions, as well as a key marketing strategy for appliance manufacturers.

In 2010, however, there was increasing media and public debate about the credibility of the health protection features of different types of consumer appliances. One typical case was Samsung washing machines, which claimed to be able to kill 99.9% of bacteria using Nano Silver technology. Media and scientific reports pointed out that laundry detergent alone was equally effective in killing bacteria, making Nano Silver technology redundant in this regard. There was also controversy over claims that certain Samsung and LG air conditioners could kill 99.9% of H1N1 viruses. It was later proven that these products could only reduce the concentration of viruses. Such misleading advertising claims not only harmed the images of the brands in question, but also cast a negative light on consumer appliance products with genuine health protection features.

Outlook

With heath consciousness on the rise among Vietnamese consumers, health protection will remain a key driver of development within the consumer appliances market over the forecast period. Manufacturers will compete to develop new and more effective health protection technologies at the lowest possible price. At the same time, manufacturers will continue to refine their marketing strategies, with many likely to adopt more credible marketing claims on the health protection features of their products so as to avoid misleading consumers and damaging their brand images.

The health protection trend is likely to remain strongest in categories like air conditioners, refrigeration appliances and automatic washing machines. However, it is also expected to spread to other categories such as vacuum cleaners and food processors as consumers become increasingly concerned with health issues. Manufacturers in these latter categories could gain a competitive advantage over their rivals by moving first to develop and adopt new health protection technologies.

Future Impact

As of 2010, consumer appliance manufacturers used two main technologies to prevent bacteria, Nano Silver and Hybrid Plasma. It is expected that the number of manufacturers that apply these technologies to their products will continue to rise over the forecast period. At the same time, manufacturers will invest in the development of new and more effective technologies to prevent the spread of bacteria and air or waterborne viruses.

The trend towards choosing appliances with health protection features will favour established multinational manufacturers offering reputable brands. Local manufacturers making health protection claims for their products are likely to be viewed with some scepticism by consumers. This is because the technologies in question are highly sophisticated and expensive, making it less likely that small domestic companies would have the financial or technical resources to adopt them. The same applies to cheaper appliances imported from China.

Consumers Show A Growing Preference for Larger and Luxury Appliances

During the review period, Vietnamese consumers showed a growing preference for larger appliances. This trend was driven by busier lifestyles and the increasing affordability of large models. For example, many consumers switched to larger refrigeration appliances so that they could store more food at home and reduce the number of times they had to go grocery shopping each week or fortnight. Similarly, many consumers purchased bigger home laundry appliances to reduce the amount of time spent on washing and drying clothes, bed linens etc.

In addition to opting for bigger appliances, many consumers were also able to trade up to premium or luxury products thanks to rising incomes. Demand for certain products that were once considered luxury items started to pick up in 2010, such as electric wine coolers/chillers and automatic washer dryers.

Current Impact

The trend towards larger and luxury appliances has proved a boon for manufacturers, as they tend to offer higher margins than smaller and standard models. To capitalise fully on this trend, many companies have already updated their portfolios in accordance with the changing preferences of consumers. For instance, while the majority of automatic washing machines on sale in Vietnam in 2010 had a capacity of 6-7kg, several companies were offering larger models, including products with a capacity of up to 12kg. Manufacturers were also active in attempting to cash in on the luxury trend, launching more high-end or premium products in several consumer appliance categories. One notable example was the introduction of Samsung's French Door Fridge Freezer, which is expected to be a hit in more affluent households over the forecast period.

Outlook

Demand for larger and luxury appliances looks set to continue growing strongly over the forecast period. Increasingly busy lifestyles, particularly among urban consumers, will fuel demand for bigger appliances that can save time on household chores. At the same time, economic development and rising income levels will bolster demand for luxury appliances. Together with efforts by retailers to increase their profits, both of these trends are likely to result in growth in imports of high-end appliances and more advanced models into Vietnam.

Busier consumer lifestyles and rising disposable incomes are also expected to have a positive impact on demand for more niche products that are perceived as convenient but not essential. Consumer appliance categories likely to benefit from this trend include grinders and choppers, mixers etc.

In the past, Western lifestyle and consumption habits had a luxury image in Vietnam. However, as income levels continue to rise, Vietnamese consumers are increasingly embracing Western trends and cuisine. Over the forecast period, this should result in stronger demand for food preparation appliances that make it easier to prepare Western-style snacks and meals, such as sandwich makers and ovens.

Future Impact

Over the forecast period, the shift towards bigger models is likely to be strongest in major appliance categories. For example, while traditional double-door (top freezer) products remained the most popular within the fridge freezers category in 2010, claiming a volume share of 73%, over the forecast period they are expected to lose ground to 3-door models.

In appliance categories that already have a high household penetration rate, such as washing machines and fridges, competition between manufacturers offering more sophisticated high-end models is likely to be intense. To justify their higher prices, manufacturers will have to increase investment in product design, so as to make new models more convenient and attractive to consumers, as well as in marketing activities. Multinational manufacturers and imported brands are likely to lead the way in this regard.

MARKET INDICATORS

Table 1 Household Penetration of Selected Total Stock Consumer Appliances by Category 2005-2010

% households

	2005	2006	2007	2008	2009	2010
Dishwashers	-	0.0	0.1	0.1	0.1	0.1
Automatic Tumble Dryers	-	-	-	-	-	-
Automatic Washer Dryers	-	-	-	0.1	0.1	0.1
Automatic Washing Machines	8.4	10.2	12.3	14.2	16.3	16.8
Semi-Automatic Washing Machines	-	-	-	-	-	-
Ovens	-	-	-	-	-	-
Cooker Hoods	0.9	1.2	1.6	2.3	3.3	4.4
Cookers	3.3	3.8	4.3	4.8	5.4	6.2
Range Cookers	-	-	-	-	-	-
Microwaves	11.3	13.1	14.5	16.0	17.1	18.5
Electric Wine Coolers/ Chillers	-	-	0.1	0.1	0.1	0.1
Freezers	-	-	-	-	-	-
Fridge Freezers	28.0	32.0	37.0	42.5	48.0	58.0
Fridges	4.4	5.0	5.6	6.3	7.1	7.3
Room Air Conditioners	0.1	0.1	0.1	0.1	0.2	0.2
Split Air Conditioners	13.0	13.8	15.2	16.5	17.6	19.0

Window Air Conditioners	4.7	4.6	4.6	4.5	4.5	4.4
Cooling Fans	82.6	83.1	83.5	83.9	84.3	84.8
Food Preparation Appliances	0.8	0.9	1.0	1.1	1.1	1.2
Heating Appliances	0.6	0.6	0.6	0.6	0.6	0.6
Irons	39.7	40.5	41.2	42.0	42.7	43.4
Body Shavers	11.8	12.2	13.0	13.8	14.5	15.3
Hair Care Appliances	10.8	11.8	12.5	13.3	14.1	14.9
Oral Hygiene Appliances	-	-	-	-	-	-
Coffee Machines	1.4	1.4	1.4	1.4	1.5	1.5
Cylinder Vacuum Cleaners	1.3	1.4	1.5	1.7	2.0	2.4
Stick Vacuum Cleaners	-	-	-	-	-	-
Handheld Vacuum Cleaners	-	-	-	-	-	-
Upright Vacuum Cleaners	-	-	-	-	-	-
Wet and Dry Vacuum Cleaners	-	-	-	-	-	-

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

Table 2 Replacement Cycles of Consumer Appliances by Category 2007-2010

Replacement cycles - years

	2007	2008	2009	2010
Dishwashers	9.0	9.0	9.0	9.0
Automatic washing machines	12.0	10.0	9.0	8.0
Built-In Hobs	8.0	8.0	8.0	8.0
Cooker hoods	6.0	6.0	6.0	6.0
Cookers	10.0	10.0	10.0	10.0
Microwaves	6.0	6.0	6.0	6.0
Electric wine coolers/chillers	9.0	9.0	9.0	9.0
Fridge freezers	10.0	10.0	10.0	10.0
Fridges	8.0	8.0	8.0	8.0
Room air conditioners	5.0	5.0	5.0	5.0
Split	10.0	10.0	10.0	10.0
Window Air Conditioners	5.0	5.0	5.0	5.0
Cooling fans	3.0	3.0	3.0	3.0
Food preparation appliances	3.5	3.5	3.5	3.5
Heating appliances	3.0	3.0	3.0	3.0
Irons	3.0	3.0	3.0	3.0
Body shavers	3.0	3.0	3.0	3.0
Hair care appliances	4.0	4.0	4.0	4.0
Coffee machines	6.0	6.0	6.0	6.0
Freestanding Hobs	6.0	6.0	6.0	6.0
Mini-Ovens	6.0	6.0	6.0	6.0
Cylinder vacuum cleaners	5.0	5.0	5.0	5.0
Handheld vacuum cleaners	6.0	6.0	6.0	6.0
Upright vacuum cleaners	6.0	6.0	6.0	6.0
Wet and dry vacuum cleaners	6.0	6.0	6.0	6.0

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

MARKET DATA

Table 3 Sales of Consumer Appliances by Category: Volume 2005-2010

'000 units

	2005	2006	2007	2008	2009	2010
Major Appliances	2,119.1	2,608.6	3,181.3	3,538.9	3,988.6	4,742.3
Small Appliances	5,743.5	6,350.4	7,127.0	7,807.5	8,614.1	9,444.6
Consumer Appliances	7,862.6	8,958.9	10,308.3	11,346.4	12,602.7	14,187.0

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

Table 4 Sales of Consumer Appliances by Category: Value 2005-2010

VND billion

	2005	2006	2007	2008	2009	2010
Major Appliances	7,421.2	9,729.6	12,986.8	14,394.1	15,795.1	19,818.7
Small Appliances	4,446.9	5,258.2	6,218.2	7,349.2	8,840.8	11,063.1
Consumer Appliances	11,868.1	14,987.7	19,205.0	21,743.3	24,635.8	30,881.8

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

Table 5 Sales of Consumer Appliances by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Major Appliances	18.9	17.5	123.8
Small Appliances	9.6	10.5	64.4
Consumer Appliances	12.6	12.5	80.4

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

Table 6 Sales of Consumer Appliances by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Major Appliances	25.5	21.7	167.1
Small Appliances	25.1	20.0	148.8
Consumer Appliances	25.4	21.1	160.2

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

Table 7 Sales of Major Appliances by Category and by Built-in/Freestanding Split: Volume 2005-2010

'000 units

	2005	2006	2007	2008	2009	2010
Built-In Dishwashers	-	-	-	-	0.1	0.1
Freestanding Dishwashers	-	-	0.2	0.2	0.3	0.3
Dishwashers	-	-	0.2	0.2	0.3	0.4
Built-In Home Laundry Appliances	-	-	-	-	-	-
Freestanding Home Laundry Appliances	493.5	527.1	559.6	460.3	551.0	633.6
Automatic Tumble Dryers	-	-	-	-	-	-
- Built-In Tumble Dryers	-	-	-	-	-	-
- Freestanding Tumble Dryers	-	-	-	-	-	-
Automatic Washer Dryers	-	-	-	0.9	1.0	1.1
- Built-In Washer Dryers	-	-	-	-	-	-
- Freestanding Washer Dryers	-	-	-	0.9	1.0	1.1
Automatic Washing Machines	493.5	527.1	559.6	459.4	550.0	632.5

- Built-In Automatic Washing Machines	-	-	-	-	-	-
- Freestanding Automatic Washing Machines	493.5	527.1	559.6	459.4	550.0	632.5
Semi-Automatic Washing Machines	-	-	-	-	-	-
Other Home Laundry Appliances	-	-	-	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-	-	-	-
Home Laundry Appliances	493.5	527.1	559.6	460.3	551.0	633.6
Built-In Large Cooking Appliances	68.6	104.5	165.6	261.3	366.9	482.1
Freestanding Large Cooking Appliances	111.5	125.9	152.4	178.3	206.8	236.4
Built-In Hobs	17.6	32.5	62.6	108.4	143.0	197.3
Ovens	-	-	-	-	-	-
Cooker Hoods	51.0	72.0	103.0	152.9	223.9	284.7
- Built-In Cooker Hoods	51.0	72.0	103.0	152.9	223.9	284.7
- Freestanding Cooker Hoods	-	-	-	-	-	-
Cookers	111.5	125.9	152.4	178.3	206.8	236.4
Range Cookers	-	-	-	-	-	-
Large Cooking Appliances	180.1	230.4	318.0	439.6	573.7	718.5
Built-In Microwaves	-	-	-	-	-	-
Freestanding Microwaves	395.1	482.1	578.5	590.0	613.7	672.0
Built-In Refrigeration Appliances	-	-	-	-	-	-
Freestanding Refrigeration Appliances	1,050.5	1,369.0	1,725.0	2,048.7	2,249.9	2,717.9
Electric Wine Coolers/ Chillers	-	-	0.1	0.2	0.2	0.2
- Built-In Electric Wine Coolers/Chillers	-	-	-	-	-	-
- Freestanding Electric Wine Coolers/Chillers	-	-	0.1	0.2	0.2	0.2
Freezers	-	-	-	-	-	-
- Built-In Freezers	-	-	-	-	-	-
- Freestanding Freezers	-	-	-	-	-	-
Fridge Freezers	884.0	1,153.9	1,473.4	1,769.5	1,950.0	2,398.5
- Built-In Fridge Freezers	-	-	-	-	-	-
- Freestanding Fridge Freezers	884.0	1,153.9	1,473.4	1,769.5	1,950.0	2,398.5
Fridges	166.5	215.1	251.5	279.1	299.8	319.3
- Built-In Fridges	-	-	-	-	-	-
- Freestanding Fridges	166.5	215.1	251.5	279.1	299.8	319.3
Refrigeration Appliances	1,050.5	1,369.0	1,725.0	2,048.7	2,249.9	2,717.9
Microwaves	395.1	482.1	578.5	590.0	613.7	672.0
Built-In Major Appliances	68.6	104.5	165.6	261.3	366.9	482.2
Freestanding Major Appliances	2,050.5	2,504.1	3,015.8	3,277.6	3,621.7	4,260.2
Major Appliances	2,119.1	2,608.6	3,181.3	3,538.9	3,988.6	4,742.3

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

Table 8 **Sales of Major Appliances by Category and by Built-in/Freestanding Split: Value 2005-2010**

VND billion	2005	2006	2007	2008	2009	2010

Built-In Dishwashers	-	-	-	-	0.8	0.9
Freestanding Dishwashers	-	-	1.9	2.1	2.2	2.4
Dishwashers	-	-	1.9	2.1	3.0	3.4
Built-In Home Laundry Appliances	-	-	-	-	-	-
Freestanding Home Laundry Appliances	1,949.4	2,157.7	3,016.8	1,963.6	2,201.1	2,662.4
Automatic Tumble Dryers	-	-	-	-	-	-
- Built-In Tumble Dryers	-	-	-	-	-	-
- Freestanding Tumble Dryers	-	-	-	-	-	-
Automatic Washer Dryers	-	-	-	11.2	12.1	13.7
- Built-In Washer Dryers	-	-	-	-	-	-
- Freestanding Washer Dryers	-	-	-	11.2	12.1	13.7
Automatic Washing Machines	1,949.4	2,157.7	3,016.8	1,952.5	2,189.0	2,648.7
- Built-In Automatic Washing Machines	-	-	-	-	-	-
- Freestanding Automatic Washing Machines	1,949.4	2,157.7	3,016.8	1,952.5	2,189.0	2,648.7
Semi-Automatic Washing Machines	-	-	-	-	-	-
Other Home Laundry Appliances	-	-	-	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-	-	-	-
Home Laundry Appliances	1,949.4	2,157.7	3,016.8	1,963.6	2,201.1	2,662.4
Built-In Large Cooking Appliances	162.1	259.2	445.5	745.8	1,029.3	1,443.7
Freestanding Large Cooking Appliances	1,114.4	1,289.5	1,593.1	1,901.2	2,247.6	2,640.9
Built-In Hobs	55.5	107.2	216.5	387.6	492.2	718.7
Ovens	-	-	-	-	-	-
Cooker Hoods	106.5	152.0	229.0	358.2	537.0	725.0
- Built-In Cooker Hoods	106.5	152.0	229.0	358.2	537.0	725.0
- Freestanding Cooker Hoods	-	-	-	-	-	-
Cookers	1,114.4	1,289.5	1,593.1	1,901.2	2,247.6	2,640.9
Range Cookers	-	-	-	-	-	-
Large Cooking Appliances	1,276.5	1,548.7	2,038.6	2,647.0	3,276.8	4,084.5
Built-In Microwaves	-	-	-	-	-	-
Freestanding Microwaves	1,052.3	1,247.6	1,425.8	1,410.8	1,452.5	1,594.8
Built-In Refrigeration Appliances	-	-	-	-	-	-
Freestanding Refrigeration Appliances	3,143.1	4,775.6	6,503.7	8,370.7	8,861.7	11,473.6
Electric Wine Coolers/ Chillers	-	-	0.2	0.3	0.3	0.3
- Built-In Electric Wine Coolers/Chillers	-	-	-	-	-	-
- Freestanding Electric Wine Coolers/Chillers	-	-	0.2	0.3	0.3	0.3
Freezers	-	-	-	-	-	-
- Built-In Freezers	-	-	-	-	-	-
- Freestanding Freezers	-	-	-	-	-	-
Fridge Freezers	2,745.9	4,236.9	5,856.7	7,665.8	8,151.0	10,759.3
- Built-In Fridge Freezers	-	-	-	-	-	-
- Freestanding Fridge Freezers	2,745.9	4,236.9	5,856.7	7,665.8	8,151.0	10,759.3
Fridges	397.3	538.7	646.8	704.6	710.4	713.9

- Built-In Fridges	-	-	-	-	-	-
- Freestanding Fridges	397.3	538.7	646.8	704.6	710.4	713.9
Refrigeration Appliances	3,143.1	4,775.6	6,503.7	8,370.7	8,861.7	11,473.6
Microwaves	1,052.3	1,247.6	1,425.8	1,410.8	1,452.5	1,594.8
Built-In Major Appliances	162.1	259.2	445.5	745.8	1,030.1	1,444.6
Freestanding Major Appliances	7,259.2	9,470.4	12,541.3	13,648.3	14,765.0	18,374.1
Major Appliances	7,421.2	9,729.6	12,986.8	14,394.1	15,795.1	19,818.7

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

Table 9 Sales of Major Appliances by Category and by Built-in/Freestanding Split: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Built-In Dishwashers	11.2	-	-
Freestanding Dishwashers	8.3	-	-
Dishwashers	8.9	-	-
Built-In Home Laundry Appliances	-	-	-
Freestanding Home Laundry Appliances	15.0	5.1	28.4
Automatic Tumble Dryers	-	-	-
- Built-In Tumble Dryers	-	-	-
- Freestanding Tumble Dryers	-	-	-
Automatic Washer Dryers	11.5	-	-
- Built-In Washer Dryers	-	-	-
- Freestanding Washer Dryers	11.5	-	-
Automatic Washing Machines	15.0	5.1	28.2
- Built-In Automatic Washing Machines	-	-	-
- Freestanding Automatic Washing Machines	15.0	5.1	28.2
Semi-Automatic Washing Machines	-	-	-
Other Home Laundry Appliances	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-
Home Laundry Appliances	15.0	5.1	28.4
Built-In Large Cooking Appliances	31.4	47.7	602.8
Freestanding Large Cooking Appliances	14.3	16.2	112.1
Built-In Hobs	38.0	62.2	1,021.3
Ovens	-	-	-
Cooker Hoods	27.2	41.1	458.4
- Built-In Cooker Hoods	27.2	41.1	458.4
- Freestanding Cooker Hoods	-	-	-
Cookers	14.3	16.2	112.1
Range Cookers	-	-	-
Large Cooking Appliances	25.2	31.9	299.0
Built-In Microwaves	-	-	-
Freestanding Microwaves	9.5	11.2	70.1
Built-In Refrigeration Appliances	-	-	-
Freestanding Refrigeration Appliances	20.8	20.9	158.7
Electric Wine Coolers/Chillers	8.7	-	-
- Built-In Electric Wine Coolers/ Chillers	-	-	-
- Freestanding Electric Wine Coolers/ Chillers	8.7	-	-
Freezers	-	-	-
- Built-In Freezers	-	-	-
- Freestanding Freezers	-	-	-
Fridge Freezers	23.0	22.1	171.3
- Built-In Fridge Freezers	-	-	-
- Freestanding Fridge Freezers	23.0	22.1	171.3
Fridges	6.5	13.9	91.8

- Built-In Fridges	-	-	-
- Freestanding Fridges	6.5	13.9	91.8
Refrigeration Appliances	20.8	20.9	158.7
Microwaves	9.5	11.2	70.1
Built-In Major Appliances	31.4	47.7	602.9
Freestanding Major Appliances	17.6	15.7	107.8
Major Appliances	18.9	17.5	123.8

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

Table 10 Sales of Major Appliances by Category and by Built-in/Freestanding Split: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Built-In Dishwashers	19.0	-	-
Freestanding Dishwashers	12.4	-	-
Dishwashers	14.2	-	-
Built-In Home Laundry Appliances	-	-	-
Freestanding Home Laundry Appliances	21.0	6.4	36.6
Automatic Tumble Dryers	-	-	-
- Built-In Tumble Dryers	-	-	-
- Freestanding Tumble Dryers	-	-	-
Automatic Washer Dryers	13.0	-	-
- Built-In Washer Dryers	-	-	-
- Freestanding Washer Dryers	13.0	-	-
Automatic Washing Machines	21.0	6.3	35.9
- Built-In Automatic Washing Machines	-	-	-
- Freestanding Automatic Washing Machines	21.0	6.3	35.9
Semi-Automatic Washing Machines	-	-	-
Other Home Laundry Appliances	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-
Home Laundry Appliances	21.0	6.4	36.6
Built-In Large Cooking Appliances	40.3	54.9	790.8
Freestanding Large Cooking Appliances	17.5	18.8	137.0
Built-In Hobs	46.0	66.9	1,194.0
Ovens	-	-	-
Cooker Hoods	35.0	46.8	580.6
- Built-In Cooker Hoods	35.0	46.8	580.6
- Freestanding Cooker Hoods	-	-	-
Cookers	17.5	18.8	137.0
Range Cookers	-	-	-
Large Cooking Appliances	24.6	26.2	220.0
Built-In Microwaves	-	-	-
Freestanding Microwaves	9.8	8.7	51.6
Built-In Refrigeration Appliances	-	-	-
Freestanding Refrigeration Appliances	29.5	29.6	265.0
Electric Wine Coolers/Chillers	14.6	-	-
- Built-In Electric Wine Coolers/ Chillers	-	-	-
- Freestanding Electric Wine Coolers/ Chillers	14.6	-	-
Freezers	-	-	-
- Built-In Freezers	-	-	-
- Freestanding Freezers	-	-	-
Fridge Freezers	32.0	31.4	291.8
- Built-In Fridge Freezers	-	-	-
- Freestanding Fridge Freezers	32.0	31.4	291.8
Fridges	0.5	12.4	79.7
- Built-In Fridges	-	-	-

- Freestanding Fridges	0.5	12.4	79.7
Refrigeration Appliances	29.5	29.6	265.0
Microwaves	9.8	8.7	51.6
Built-In Major Appliances	40.2	54.9	791.4
Freestanding Major Appliances	24.4	20.4	153.1
Major Appliances	25.5	21.7	167.1

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

Table 11 Sales of Small Appliances by Category: Volume 2005-2010

'000 units

	2005	2006	2007	2008	2009	2010
Air Purifiers	-	-	-	-	-	-
Cooling	715.2	856.2	1,038.8	1,212.3	1,441.9	1,721.0
Dehumidifiers	-	-	-	-	-	-
Humidifiers	-	-	-	-	-	-
Other Air Treatment Products	-	-	-	-	-	-
Air Treatment Products	715.2	856.2	1,038.8	1,212.3	1,441.9	1,721.0
Blenders	592.6	638.3	690.9	680.2	696.2	704.9
Citrus Pressers	50.4	56.5	64.4	72.1	80.3	87.4
Food Processors	146.1	168.0	196.5	235.8	260.6	287.2
Grinders And Choppers	18.2	22.3	27.9	32.9	37.8	40.5
Juice Extractors	38.5	39.3	40.9	42.9	45.2	46.8
Mixers	2.0	3.8	5.6	7.4	9.1	10.5
Smoothie Makers	-	-	-	-	-	-
Other Food Preparation Appliances	-	-	-	-	-	-
Food Preparation Appliances	847.7	928.2	1,026.1	1,071.4	1,129.2	1,177.2
Convector Heaters	-	-	-	-	-	-
Electric Blankets	-	-	-	-	-	-
Electric Fires	-	-	-	-	-	-
Fan Heaters	10.5	12.6	15.0	14.7	15.2	15.8
Oil-Filled Radiators	-	-	-	-	-	-
Panel Heaters	-	-	-	-	-	-
Other Heating Appliances	-	-	-	-	-	-
Heating Appliances	10.5	12.6	15.0	14.7	15.2	15.8
Irons	933.3	979.9	1,040.7	1,123.9	1,208.2	1,295.4
Body Shavers	208.2	239.4	284.9	327.6	380.1	425.7
Hair Care Appliances	317.5	349.2	391.1	449.8	520.0	592.8
Oral Hygiene Appliances	-	-	-	-	-	-
Other Personal Care Appliances	-	-	-	-	-	-
Personal Care Appliances	525.7	588.6	676.0	777.5	900.1	1,018.5
Breadmakers	-	-	-	-	-	-
Coffee Machines	14.8	16.3	18.4	20.3	22.6	25.1
Deep Fat Fryers	-	-	-	-	-	-
Electric Grills	-	-	-	-	-	-
Electric Steamers	-	-	-	-	-	-
Freestanding Hobs	587.6	644.6	717.4	792.2	876.7	969.6
Mini Ovens	28.2	34.9	43.4	50.0	56.5	64.7
Rice Cookers	1,542.0	1,665.4	1,815.2	1,924.2	2,033.8	2,102.9
Rotisseries And Roasters	-	-	-	-	-	-
Sandwich Makers	25.9	28.4	31.5	35.3	39.7	45.5
Slow Cookers	-	-	-	-	-	-
Toasters	23.1	29.1	37.0	44.4	54.6	64.5
Waffle Makers	-	-	-	-	-	-
Other Small Cooking Appliances	-	-	-	-	-	-
Small Cooking Appliances	2,221.6	2,418.6	2,663.1	2,866.3	3,083.8	3,272.3
Coffee Mills	-	-	-	-	-	-

Food And Meat Slicers	-	-	-	-	-	-
Kettles	441.0	507.1	593.3	652.6	731.0	820.9
Other Small Kitchen Appliances (Non-Cooking)	-	-	-	-	-	-
Small Kitchen Appliances (Non-Cooking)	441.0	507.1	593.3	652.6	731.0	820.9
Cylinder Vacuum Cleaners	48.5	59.2	74.0	88.8	104.7	123.7
Stick Vacuum Cleaners	-	-	-	-	-	-
Handheld Vacuum Cleaners	-	-	-	-	-	-
Upright Vacuum Cleaners	-	-	-	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-	-	-	-
Other Vacuum Cleaners	-	-	-	-	-	-
Vacuum Cleaners	48.5	59.2	74.0	88.8	104.7	123.7
Small Appliances	5,743.5	6,350.4	7,127.0	7,807.5	8,614.1	9,444.6

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

Table 12 Sales of Small Appliances by Category: Value 2005-2010

VND billion

	2005	2006	2007	2008	2009	2010
Air Purifiers	-	-	-	-	-	-
Cooling	2,093.3	2,621.9	3,311.7	4,160.3	5,336.9	6,995.3
Dehumidifiers	-	-	-	-	-	-
Humidifiers	-	-	-	-	-	-
Other Air Treatment Products	-	-	-	-	-	-
Air Treatment Products	2,093.3	2,621.9	3,311.7	4,160.3	5,336.9	6,995.3
Blenders	224.6	259.9	282.6	311.3	335.9	380.6
Citrus Pressers	30.2	35.0	41.5	43.2	45.8	55.1
Food Processors	93.4	106.9	124.7	154.1	169.5	206.5
Grinders And Choppers	7.2	9.3	11.7	13.1	14.7	17.6
Juice Extractors	13.5	14.4	15.7	15.7	16.7	19.2
Mixers	1.6	3.2	4.7	5.9	7.4	9.6
Smoothie Makers	-	-	-	-	-	-
Other Food Preparation Appliances	-	-	-	-	-	-
Food Preparation Appliances	370.5	428.7	480.9	543.3	589.9	688.6
Convector Heaters	-	-	-	-	-	-
Electric Blankets	-	-	-	-	-	-
Electric Fires	-	-	-	-	-	-
Fan Heaters	10.1	11.9	14.1	13.7	14.2	16.4
Oil-Filled Radiators	-	-	-	-	-	-
Panel Heaters	-	-	-	-	-	-
Other Heating Appliances	-	-	-	-	-	-
Heating Appliances	10.1	11.9	14.1	13.7	14.2	16.4
Irons	231.6	291.1	296.8	327.0	357.6	409.3
Body Shavers	200.1	223.2	260.4	302.4	361.0	422.4
Hair Care Appliances	113.1	130.6	152.1	178.5	213.2	251.6
Oral Hygiene Appliances	-	-	-	-	-	-
Other Personal Care Appliances	-	-	-	-	-	-
Personal Care Appliances	313.2	353.8	412.6	480.9	574.2	674.0
Breadmakers	-	-	-	-	-	-
Coffee Machines	9.8	10.7	12.0	13.1	15.4	19.1
Deep Fat Fryers	-	-	-	-	-	-
Electric Grills	-	-	-	-	-	-
Electric Steamers	-	-	-	-	-	-
Freestanding Hobs	423.0	454.5	494.1	528.8	573.7	642.6
Mini Ovens	19.4	24.1	29.7	33.6	37.9	44.3
Rice Cookers	686.2	727.4	777.0	821.3	862.0	996.3

Rotisseries And Roasters	-	-	-	-	-	-
Sandwich Makers	13.0	13.1	13.1	13.9	15.8	20.4
Slow Cookers	-	-	-	-	-	-
Toasters	6.6	8.3	10.3	12.1	15.4	20.2
Waffle Makers	-	-	-	-	-	-
Other Small Cooking Appliances	-	-	-	-	-	-
Small Cooking Appliances	1,157.9	1,238.0	1,336.3	1,422.8	1,520.2	1,742.9
Coffee Mills	-	-	-	-	-	-
Food And Meat Slicers	-	-	-	-	-	-
Kettles	199.3	224.6	252.3	263.7	287.4	328.0
Other Small Kitchen Appliances (Non-Cooking)	-	-	-	-	-	-
Small Kitchen Appliances (Non-Cooking)	199.3	224.6	252.3	263.7	287.4	328.0
Cylinder Vacuum Cleaners	70.8	88.1	113.4	137.5	160.2	208.5
Stick Vacuum Cleaners	-	-	-	-	-	-
Handheld Vacuum Cleaners	-	-	-	-	-	-
Upright Vacuum Cleaners	-	-	-	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-	-	-	-
Other Vacuum Cleaners	-	-	-	-	-	-
Vacuum Cleaners	70.8	88.1	113.4	137.5	160.2	208.5
Small Appliances	4,446.9	5,258.2	6,218.2	7,349.2	8,840.8	11,063.1

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

Table 13 Sales of Small Appliances by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Air Purifiers	-	-	-
Cooling	19.4	19.2	140.7
Dehumidifiers	-	-	-
Humidifiers	-	-	-
Other Air Treatment Products	-	-	-
Air Treatment Products	19.4	19.2	140.7
Blenders	1.2	3.5	18.9
Citrus Pressers	8.8	11.6	73.3
Food Processors	10.2	14.5	96.6
Grinders And Choppers	7.3	17.4	123.1
Juice Extractors	3.5	4.0	21.6
Mixers	15.2	39.3	424.1
Smoothie Makers	-	-	-
Other Food Preparation Appliances	-	-	-
Food Preparation Appliances	4.3	6.8	38.9
Convector Heaters	-	-	-
Electric Blankets	-	-	-
Electric Fires	-	-	-
Fan Heaters	3.5	8.5	50.2
Oil-Filled Radiators	-	-	-
Panel Heaters	-	-	-
Other Heating Appliances	-	-	-
Heating Appliances	3.5	8.5	50.2
Irons	7.2	6.8	38.8
Body Shavers	12.0	15.4	104.5
Hair Care Appliances	14.0	13.3	86.7
Oral Hygiene Appliances	-	-	-
Other Personal Care Appliances	-	-	-
Personal Care Appliances	13.2	14.1	93.7
Breadmakers	-	-	-
Coffee Machines	11.2	11.1	69.5
Deep Fat Fryers	-	-	-

Electric Grills	-	-	-
Electric Steamers	-	-	-
Freestanding Hobs	10.6	10.5	65.0
Mini Ovens	14.5	18.1	129.7
Rice Cookers	3.4	6.4	36.4
Rotisseries And Roasters	-	-	-
Sandwich Makers	14.5	11.9	75.3
Slow Cookers	-	-	-
Toasters	18.1	22.8	179.0
Waffle Makers	-	-	-
Other Small Cooking Appliances	-	-	-
Small Cooking Appliances	6.1	8.1	47.3
Coffee Mills	-	-	-
Food And Meat Slicers	-	-	-
Kettles	12.3	13.2	86.2
Other Small Kitchen Appliances (Non-Cooking)	-	-	-
Small Kitchen Appliances (Non-Cooking)	12.3	13.2	86.2
Cylinder Vacuum Cleaners	18.1	20.6	155.0
Stick Vacuum Cleaners	-	-	-
Handheld Vacuum Cleaners	-	-	-
Upright Vacuum Cleaners	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-
Other Vacuum Cleaners	-	-	-
Vacuum Cleaners	18.1	20.6	155.0
Small Appliances	9.6	10.5	64.4

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

Table 14 Sales of Small Appliances by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Air Purifiers	-	-	-
Cooling	31.1	27.3	234.2
Dehumidifiers	-	-	-
Humidifiers	-	-	-
Other Air Treatment Products	-	-	-
Air Treatment Products	31.1	27.3	234.2
Blenders	13.3	11.1	69.5
Citrus Pressers	20.3	12.7	82.1
Food Processors	21.9	17.2	121.2
Grinders And Choppers	19.7	19.5	143.5
Juice Extractors	15.4	7.4	42.9
Mixers	30.6	42.7	492.4
Smoothie Makers	-	-	-
Other Food Preparation Appliances	-	-	-
Food Preparation Appliances	16.7	13.2	85.9
Convector Heaters	-	-	-
Electric Blankets	-	-	-
Electric Fires	-	-	-
Fan Heaters	15.5	10.2	62.3
Oil-Filled Radiators	-	-	-
Panel Heaters	-	-	-
Other Heating Appliances	-	-	-
Heating Appliances	15.5	10.2	62.3
Irons	14.5	12.1	76.7
Body Shavers	17.0	16.1	111.0
Hair Care Appliances	18.0	17.3	122.4
Oral Hygiene Appliances	-	-	-
Other Personal Care Appliances	-	-	-
Personal Care Appliances	17.4	16.6	115.2
Breadmakers	-	-	-

Coffee Machines	23.5	14.2	94.4
Deep Fat Fryers	-	-	-
Electric Grills	-	-	-
Electric Steamers	-	-	-
Freestanding Hobs	12.0	8.7	51.9
Mini Ovens	17.0	17.9	128.0
Rice Cookers	15.6	7.7	45.2
Rotisseries And Roasters	-	-	-
Sandwich Makers	28.9	9.5	57.1
Slow Cookers	-	-	-
Toasters	31.5	25.2	207.1
Waffle Makers	-	-	-
Other Small Cooking Appliances	-	-	-
Small Cooking Appliances	14.6	8.5	50.5
Coffee Mills	-	-	-
Food And Meat Slicers	-	-	-
Kettles	14.1	10.5	64.6
Other Small Kitchen Appliances (Non-Cooking)	-	-	-
Small Kitchen Appliances (Non-Cooking)	14.1	10.5	64.6
Cylinder Vacuum Cleaners	30.1	24.1	194.5
Stick Vacuum Cleaners	-	-	-
Handheld Vacuum Cleaners	-	-	-
Upright Vacuum Cleaners	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-
Other Vacuum Cleaners	-	-	-
Vacuum Cleaners	30.1	24.1	194.5
Small Appliances	25.1	20.0	148.8

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

Table 15 Company Shares of Major Appliances 2006-2010

% retail volume

Company	2006	2007	2008	2009	2010
Sanyo Home Appliances Asean Co Ltd	37.1	42.3	45.5	48.3	49.8
LG Electronics Vietnam	10.4	10.5	9.7	9.7	9.7
Toshiba Consumer Products Vietnam Co Ltd	10.2	9.0	8.2	6.8	6.5
Matsushita Home Appliances Co Ltd	6.4	6.0	5.8	5.3	4.8
Electrolux Vietnam Ltd	3.7	3.9	4.2	4.6	4.7
Sharp Electronics (Vietnam) Co Ltd	-	-	-	4.2	4.1
Faber SpA	0.4	0.6	1.1	1.6	2.0
Fagor Electrodomésticos, S Coop	0.6	0.7	1.1	1.3	1.5
Samsung Vina Electronics Co Ltd	2.1	2.0	1.6	1.5	1.4
Rinnai Vietnam Co Ltd	0.6	0.9	1.2	1.3	1.3
Daewoo Hanel Electrics Co, Ltd	8.6	5.1	3.1	1.1	0.5
Hitachi Asia (Vietnam) Ltd	0.3	0.3	0.2	0.3	0.3
STC Co Ltd	0.8	0.6	0.4	0.3	0.2
Goldsun JSC	0.1	0.1	0.2	0.2	0.1
Sharp Corp	4.0	4.3	4.4	-	-
Others	14.6	13.8	13.4	13.6	13.2
Total	100.0	100.0	100.0	100.0	100.0

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

Table 16 Brand Shares of Major Appliances 2007-2010

% retail volume

Brand	Company	2007	2008	2009	2010
Sanyo	Sanyo Home Appliances Asean Co Ltd	42.3	45.5	48.3	49.8
LG	LG Electronics Vietnam	10.5	9.7	9.7	9.7
Toshiba	Toshiba Consumer Products Vietnam Co Ltd	9.0	8.2	6.8	6.5
Panasonic	Matsushita Home Appliances Co Ltd	6.0	5.8	5.3	4.8
Electrolux	Electrolux Vietnam Ltd	3.9	4.2	4.6	4.7
Sharp	Sharp Electronics (Vietnam) Co Ltd	-	-	4.2	4.1
Faber	Faber SpA	0.6	1.1	1.6	2.0
Fagor	Fagor Electrodomésticos, S Coop	0.7	1.1	1.3	1.5
Samsung	Samsung Vina Electronics Co Ltd	2.0	1.6	1.5	1.4
Rinnai	Rinnai Vietnam Co Ltd	0.9	1.2	1.3	1.3
Daewoo	Daewoo Hanel Electrics Co, Ltd	5.1	3.1	1.1	0.5
Hitachi	Hitachi Asia (Vietnam) Ltd	0.3	0.2	0.3	0.3
Mitsubishi	STC Co Ltd	0.6	0.4	0.3	0.2
Goldsun	Goldsun JSC	0.1	0.2	0.2	0.1
Sharp	Sharp Corp	4.3	4.4	-	-
Others		13.8	13.4	13.6	13.2
Total		100.0	100.0	100.0	100.0

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

Table 17 Company Shares of Small Appliances 2006-2010

% retail volume

Company	2006	2007	2008	2009	2010
Philips Electronics Vietnam Co Ltd	18.8	19.4	20.4	21.3	21.3
Sharp Electronics (Vietnam) Co Ltd	-	-	-	17.7	17.0
Matsushita Home Appliances Co Ltd	14.6	14.9	15.1	15.4	15.7
Toshiba Consumer Products Vietnam Co Ltd	3.0	3.1	3.1	2.9	3.0
LG Electronics Vietnam	1.6	1.8	2.0	2.2	2.5
Phu Thai Group	3.1	3.1	2.8	2.5	2.4
Vina Electric Fan Co Ltd	1.8	1.9	1.9	2.1	2.2
Rinnai Vietnam Co Ltd	1.8	1.7	1.8	1.9	1.9
Sanyo Home Appliances Asean Co Ltd	1.6	1.6	1.6	1.6	1.7
Fimexco Joint Stock Co	1.4	1.5	1.4	1.5	1.5
Son Thang Co Ltd	1.0	1.0	1.1	1.5	1.5
Goldsun JSC	1.4	1.3	1.3	1.3	1.2
Samsung Vina Electronics Co Ltd	0.6	0.7	0.8	1.0	1.1
Tristar Corp	1.0	1.0	1.0	1.0	1.0
Tara Joint Stock Co	1.0	1.0	1.0	0.9	0.9
Kim Cuong Inox-Aluminium Co Ltd	2.1	1.7	1.3	1.1	0.9
Nagakawa Vietnam JSC	-	0.8	0.8	0.7	0.7
Scaner Electric	1.6	1.3	1.1	0.7	0.4

International Co Ltd					
An Nam Co Ltd	0.2	0.3	0.3	0.3	0.3
Sakura Corp	0.5	0.4	0.3	0.3	0.2
Hitachi Asia (Vietnam) Ltd	0.1	0.1	0.2	0.2	0.2
Hung Phat Co Ltd	0.1	0.1	0.1	0.1	0.1
Sharp Corp	19.2	18.8	18.2	-	-
Nagakawa JV Co	0.8	-	-	-	-
Quang Vinh Co Ltd	-	-	-	-	-
Others	22.7	22.6	22.5	22.2	22.3
Total	100.0	100.0	100.0	100.0	100.0

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

Table 18 Brand Shares of Small Appliances 2007-2010

% retail volume

Brand	Company	2007	2008	2009	2010
Philips	Philips Electronics Vietnam Co Ltd	19.4	20.4	21.3	21.3
Sharp	Sharp Electronics (Vietnam) Co Ltd	-	-	17.7	17.0
Panasonic	Matsushita Home Appliances Co Ltd	14.9	15.1	15.4	15.7
Toshiba	Toshiba Consumer Products Vietnam Co Ltd	3.1	3.1	2.9	3.0
LG	LG Electronics Vietnam	1.8	2.0	2.2	2.5
Asia	Vina Electric Fan Co Ltd	1.9	1.9	2.1	2.2
Rinnai	Rinnai Vietnam Co Ltd	1.7	1.8	1.9	1.9
Ichiban	Phu Thai Group	2.1	2.1	1.9	1.9
Sanyo	Sanyo Home Appliances Asean Co Ltd	1.6	1.6	1.6	1.7
Midea	Fimexco Joint Stock Co	1.5	1.4	1.5	1.5
Blacker	Son Thang Co Ltd	1.0	1.1	1.5	1.5
Goldsun	Goldsun JSC	1.3	1.3	1.3	1.2
Samsung	Samsung Vina Electronics Co Ltd	0.7	0.8	1.0	1.1
Fagor	Tristar Corp	1.0	1.0	1.0	1.0
Tiger	Tara Joint Stock Co	1.0	1.0	0.9	0.9
Kim Cuong	Kim Cuong Inox-Aluminium Co Ltd	1.7	1.3	1.1	0.9
Nagakawa	Nagakawa Vietnam JSC	0.8	0.8	0.7	0.7
Princess	Phu Thai Group	0.9	0.7	0.4	0.4
InterNational	Scaner Electric International Co Ltd	1.3	1.1	0.7	0.4
Roller Grill	An Nam Co Ltd	0.3	0.3	0.3	0.3
Sakura	Sakura Corp	0.4	0.3	0.3	0.2
Hitachi	Hitachi Asia (Vietnam) Ltd	0.1	0.2	0.2	0.2
Moulinex	Hung Phat Co Ltd	0.1	0.1	0.1	0.1
Sharp	Sharp Corp	18.8	18.2	-	-
Goldsun	Quang Vinh Co Ltd	-	-	-	-
Nagakawa	Nagakawa JV Co	-	-	-	-
Others		22.7	22.6	22.2	22.3
Total		100.0	100.0	100.0	100.0

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

Table 19 Major Appliances by Distribution Format: % Breakdown 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010

Store-Based Retailing	100.0	100.0	100.0	100.0	100.0	100.0
Grocery Retailers	4.7	4.8	4.8	4.5	4.3	4.0
Hypermarkets	1.4	1.5	1.5	1.5	1.4	1.3
Supermarkets	3.3	3.3	3.3	3.1	2.9	2.7
Discounters	-	-	-	-	-	-
Non-Grocery Retailers	95.3	95.2	95.2	95.5	95.7	96.0
Mixed Retailers	-	-	-	-	-	-
Department Stores	-	-	-	-	-	-
Variety Stores	-	-	-	-	-	-
Warehouse Clubs	-	-	-	-	-	-
Mass Merchandisers	-	-	-	-	-	-
Health and Beauty Retailers	-	-	-	-	-	-
Chemists/Pharmacies	-	-	-	-	-	-
Parapharmacies/Drugstores	-	-	-	-	-	-
Beauty Specialist Retailers	-	-	-	-	-	-
Other Health and Beauty Retailers	-	-	-	-	-	-
Home furniture and household goods retailers	-	-	-	-	-	-
Furniture and furnishing stores	-	-	-	-	-	-
DIY and hardware stores	-	-	-	-	-	-
Durable goods retailers	95.2	95.1	95.0	95.2	95.4	95.7
Kitchen specialists multiples	-	-	-	-	-	-
Kitchen specialists independents	27.2	28.3	29.7	32.8	33.2	33.5
Electrical goods retailers multiples	-	-	-	-	-	-
Electrical goods retailers independents	68.0	66.8	65.2	62.4	62.2	62.3
Construction	-	-	-	-	-	-
Builders Merchants	0.2	0.2	0.2	0.2	0.3	0.3
Other Non-Grocery Retailers	-	-	-	-	-	-
Non-Store Retailing	-	-	-	-	-	-
Homeshopping	-	-	-	-	-	-
Internet Retailing	-	-	-	-	-	-
Direct Selling	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 20 Small Appliances by Distribution Format: % Breakdown 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Store-Based Retailing	100.0	100.0	100.0	100.0	100.0	100.0
Grocery Retailers	62.9	64.7	66.2	67.6	68.8	70.2
Hypermarkets	24.3	24.8	25.7	26.3	26.9	27.6
Supermarkets	38.6	39.9	40.5	41.3	41.8	42.6
Discounters	-	-	-	-	-	-
Non-Grocery Retailers	37.1	35.3	33.8	32.4	31.2	29.8
Mixed Retailers	0.2	0.3	0.3	0.3	0.3	0.4
Department Stores	0.2	0.3	0.3	0.3	0.3	0.4
Variety Stores	-	-	-	-	-	-
Warehouse Clubs	-	-	-	-	-	-
Mass Merchandisers	-	-	-	-	-	-
Health and Beauty	0.3	0.3	0.3	0.3	0.3	0.3

Retailers						
Chemists/Pharmacies	0.0	0.0	0.0	0.0	0.0	0.0
Parapharmacies/Drugstores	0.0	0.0	0.0	0.0	0.0	0.0
Beauty Specialist Retailers	0.3	0.3	0.3	0.3	0.3	0.3
Other Health and Beauty Retailers	-	-	-	-	-	-
Home furniture and household goods retailers	-	-	-	-	-	-
Furniture and furnishing stores	-	-	-	-	-	-
DIY and hardware stores	-	-	-	-	-	-
Durable goods retailers	33.5	31.7	30.5	29.7	28.9	27.9
Kitchen specialists multiples	-	-	-	-	-	-
Kitchen specialists independents	7.2	6.6	5.8	5.5	5.3	4.8
Electrical goods retailers multiples	-	-	-	-	-	-
Electrical goods retailers independents	26.3	25.2	24.6	24.1	23.6	23.1
Construction	-	-	-	-	-	-
Builders Merchants	-	-	-	-	-	-
Other Non-Grocery Retailers	3.0	3.0	2.7	2.1	1.7	1.3
Non-Store Retailing	-	-	-	-	-	-
Homeshopping	-	-	-	-	-	-
Internet Retailing	-	-	-	-	-	-
Direct Selling	-	-	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 21 Forecast Sales of Consumer Appliances by Category: Volume 2010-2015

'000 units

	2010	2011	2012	2013	2014	2015
Major Appliances	4,742.3	5,312.9	5,794.0	6,218.2	6,577.6	6,885.8
Small Appliances	9,444.6	10,339.7	11,286.6	12,274.2	13,315.4	14,401.0
Consumer Appliances	14,187.0	15,652.6	17,080.6	18,492.4	19,893.0	21,286.9

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

Table 22 Forecast Sales of Consumer Appliances by Category: Value 2010-2015

VND billion

	2010	2011	2012	2013	2014	2015
Major Appliances	19,818.7	21,668.2	23,336.1	24,861.4	26,198.6	27,432.5
Small Appliances	11,063.1	12,327.5	13,621.3	14,867.2	16,134.0	17,402.0
Consumer Appliances	30,881.8	33,995.7	36,957.4	39,728.7	42,332.6	44,834.5

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

Table 23 Forecast Sales of Consumer Appliances by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL

Major Appliances	4.7	7.7	45.2
Small Appliances	8.2	8.8	52.5
Consumer Appliances	7.0	8.5	50.0

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

Table 24 Forecast Sales of Consumer Appliances by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Major Appliances	6.7	38.4
Small Appliances	9.5	57.3
Consumer Appliances	7.7	45.2

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

Table 25 Forecast Sales of Major Appliances by Category and by Built-in/Freestanding Split: Volume 2010-2015

'000 units

	2010	2011	2012	2013	2014	2015
Built-In Dishwashers	0.1	0.1	0.1	0.1	0.1	0.1
Freestanding Dishwashers	0.3	0.3	0.3	0.4	0.4	0.4
Dishwashers	0.4	0.4	0.4	0.5	0.5	0.6
Built-In Home Laundry Appliances	-	-	-	-	-	-
Freestanding Home Laundry Appliances	633.6	703.3	759.6	805.3	845.7	879.7
Automatic Tumble Dryers	-	-	-	-	-	-
- Built-In Tumble Dryers	-	-	-	-	-	-
- Freestanding Tumble Dryers	-	-	-	-	-	-
Automatic Washer Dryers	1.1	1.2	1.4	1.6	1.8	2.1
- Built-In Washer Dryers	-	-	-	-	-	-
- Freestanding Washer Dryers	1.1	1.2	1.4	1.6	1.8	2.1
Automatic Washing Machines	632.5	702.1	758.2	803.7	843.9	877.7
- Built-In Automatic Washing Machines	-	-	-	-	-	-
- Freestanding Automatic Washing Machines	632.5	702.1	758.2	803.7	843.9	877.7
Semi-Automatic Washing Machines	-	-	-	-	-	-
Other Home Laundry Appliances	-	-	-	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-	-	-	-
Home Laundry Appliances	633.6	703.3	759.6	805.3	845.7	879.7
Built-In Large Cooking Appliances	482.1	612.5	748.8	886.8	1,019.8	1,143.6
Freestanding Large Cooking Appliances	236.4	268.3	300.5	333.5	366.9	399.9
Built-In Hobs	197.3	256.5	318.1	378.6	435.3	483.2
Ovens	-	-	-	-	-	-
Cooker Hoods	284.7	355.9	430.7	508.2	584.4	660.4
- Built-In Cooker Hoods	284.7	355.9	430.7	508.2	584.4	660.4

- Freestanding Cooker Hoods	-	-	-	-	-	-
Cookers	236.4	268.3	300.5	333.5	366.9	399.9
Range Cookers	-	-	-	-	-	-
Large Cooking Appliances	718.5	880.8	1,049.3	1,220.3	1,386.6	1,543.5
Built-In Microwaves	-	-	-	-	-	-
Freestanding Microwaves	672.0	729.1	783.8	834.7	884.8	929.0
Built-In Refrigeration Appliances	-	-	-	-	-	-
Freestanding Refrigeration Appliances	2,717.9	2,999.3	3,200.9	3,357.4	3,460.0	3,533.0
Electric Wine Coolers/ Chillers	0.2	0.2	0.2	0.2	0.3	0.3
- Built-In Electric Wine Coolers/Chillers	-	-	-	-	-	-
- Freestanding Electric Wine Coolers/Chillers	0.2	0.2	0.2	0.2	0.3	0.3
Freezers	-	-	-	-	-	-
- Built-In Freezers	-	-	-	-	-	-
- Freestanding Freezers	-	-	-	-	-	-
Fridge Freezers	2,398.5	2,662.3	2,848.7	2,991.1	3,080.9	3,142.5
- Built-In Fridge Freezers	-	-	-	-	-	-
- Freestanding Fridge Freezers	2,398.5	2,662.3	2,848.7	2,991.1	3,080.9	3,142.5
Fridges	319.3	336.8	352.0	366.1	378.9	390.2
- Built-In Fridges	-	-	-	-	-	-
- Freestanding Fridges	319.3	336.8	352.0	366.1	378.9	390.2
Refrigeration Appliances	2,717.9	2,999.3	3,200.9	3,357.4	3,460.0	3,533.0
Microwaves	672.0	729.1	783.8	834.7	884.8	929.0
Built-In Major Appliances	482.2	612.6	748.9	886.9	1,019.9	1,143.8
Freestanding Major Appliances	4,260.2	4,700.3	5,045.1	5,331.3	5,557.8	5,742.1
Major Appliances	4,742.3	5,312.9	5,794.0	6,218.2	6,577.6	6,885.8

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

Table 26 **Forecast Sales of Major Appliances by Category and by Built-in/Freestanding Split: Value 2010-2015**

VND billion

	2010	2011	2012	2013	2014	2015
Built-In Dishwashers	0.9	1.0	1.1	1.2	1.3	1.4
Freestanding Dishwashers	2.4	2.5	2.6	2.8	3.1	3.3
Dishwashers	3.4	3.5	3.7	4.0	4.3	4.7
Built-In Home Laundry Appliances	-	-	-	-	-	-
Freestanding Home Laundry Appliances	2,662.4	2,808.3	2,934.6	3,052.3	3,144.6	3,208.8
Automatic Tumble Dryers	-	-	-	-	-	-
- Built-In Tumble Dryers	-	-	-	-	-	-
- Freestanding Tumble Dryers	-	-	-	-	-	-
Automatic Washer Dryers	13.7	14.0	14.5	15.4	16.6	18.3
- Built-In Washer Dryers	-	-	-	-	-	-
- Freestanding Washer Dryers	13.7	14.0	14.5	15.4	16.6	18.3
Automatic Washing Machines	2,648.7	2,794.4	2,920.0	3,036.9	3,128.0	3,190.5
- Built-In Automatic Washing Machines	-	-	-	-	-	-
- Freestanding Automatic Washing	2,648.7	2,794.4	2,920.0	3,036.9	3,128.0	3,190.5

Machines						
Semi-Automatic Washing Machines	-	-	-	-	-	-
Other Home Laundry Appliances	-	-	-	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-	-	-	-
Home Laundry Appliances	2,662.4	2,808.3	2,934.6	3,052.3	3,144.6	3,208.8
Built-In Large Cooking Appliances	1,443.7	1,796.9	2,169.2	2,559.3	2,948.7	3,335.7
Freestanding Large Cooking Appliances	2,640.9	2,759.7	2,878.4	2,993.5	3,107.3	3,216.0
Built-In Hobs	718.7	941.4	1,176.8	1,418.0	1,659.1	1,891.4
Ovens	-	-	-	-	-	-
Cooker Hoods	725.0	855.5	992.4	1,141.2	1,289.6	1,444.3
- Built-In Cooker Hoods	725.0	855.5	992.4	1,141.2	1,289.6	1,444.3
- Freestanding Cooker Hoods	-	-	-	-	-	-
Cookers	2,640.9	2,759.7	2,878.4	2,993.5	3,107.3	3,216.0
Range Cookers	-	-	-	-	-	-
Large Cooking Appliances	4,084.5	4,556.7	5,047.6	5,552.8	6,056.0	6,551.8
Built-In Microwaves	-	-	-	-	-	-
Freestanding Microwaves	1,594.8	1,602.8	1,620.4	1,644.7	1,674.3	1,707.8
Built-In Refrigeration Appliances	-	-	-	-	-	-
Freestanding Refrigeration Appliances	11,473.6	12,696.9	13,729.8	14,607.6	15,319.4	15,959.4
Electric Wine Coolers/ Chillers	0.3	0.3	0.4	0.4	0.4	0.4
- Built-In Electric Wine Coolers/Chillers	-	-	-	-	-	-
- Freestanding Electric Wine Coolers/Chillers	0.3	0.3	0.4	0.4	0.4	0.4
Freezers	-	-	-	-	-	-
- Built-In Freezers	-	-	-	-	-	-
- Freestanding Freezers	-	-	-	-	-	-
Fridge Freezers	10,759.3	12,050.4	13,135.0	14,054.4	14,799.3	15,465.3
- Built-In Fridge Freezers	-	-	-	-	-	-
- Freestanding Fridge Freezers	10,759.3	12,050.4	13,135.0	14,054.4	14,799.3	15,465.3
Fridges	713.9	646.1	594.4	552.8	519.6	493.7
- Built-In Fridges	-	-	-	-	-	-
- Freestanding Fridges	713.9	646.1	594.4	552.8	519.6	493.7
Refrigeration Appliances	11,473.6	12,696.9	13,729.8	14,607.6	15,319.4	15,959.4
Microwaves	1,594.8	1,602.8	1,620.4	1,644.7	1,674.3	1,707.8
Built-In Major Appliances	1,444.6	1,797.9	2,170.2	2,560.4	2,950.0	3,337.1
Freestanding Major Appliances	18,374.1	19,870.3	21,165.8	22,301.0	23,248.6	24,095.4
Major Appliances	19,818.7	21,668.2	23,336.1	24,861.4	26,198.6	27,432.5

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

Table 27 **Forecast Sales of Major Appliances by Category and by Built-in/Freestanding Split: % Volume Growth 2010-2015**

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Built-In Dishwashers	12.2	11.8	74.7
Freestanding Dishwashers	8.8	8.6	51.1
Dishwashers	9.6	9.3	55.9

Built-In Home Laundry Appliances	-	-	-
Freestanding Home Laundry Appliances	4.0	6.8	38.8
Automatic Tumble Dryers	-	-	-
- Built-In Tumble Dryers	-	-	-
- Freestanding Tumble Dryers	-	-	-
Automatic Washer Dryers	14.0	13.0	84.2
- Built-In Washer Dryers	-	-	-
- Freestanding Washer Dryers	14.0	13.0	84.2
Automatic Washing Machines	4.0	6.8	38.8
- Built-In Automatic Washing Machines	-	-	-
- Freestanding Automatic Washing Machines	4.0	6.8	38.8
Semi-Automatic Washing Machines	-	-	-
Other Home Laundry Appliances	-	-	-
- Other Built-In Home Laundry Appliances	-	-	-
- Other Freestanding Home Laundry Appliances	-	-	-
Home Laundry Appliances	4.0	6.8	38.8
Built-In Large Cooking Appliances	12.1	18.9	137.2
Freestanding Large Cooking Appliances	9.0	11.1	69.2
Built-In Hobs	11.0	19.6	144.9
Ovens	-	-	-
Cooker Hoods	13.0	18.3	131.9
- Built-In Cooker Hoods	13.0	18.3	131.9
- Freestanding Cooker Hoods	-	-	-
Cookers	9.0	11.1	69.2
Range Cookers	-	-	-
Large Cooking Appliances	11.3	16.5	114.8
Built-In Microwaves	-	-	-
Freestanding Microwaves	5.0	6.7	38.3
Built-In Refrigeration Appliances	-	-	-
Freestanding Refrigeration Appliances	2.1	5.4	30.0
Electric Wine Coolers/Chillers	12.0	10.9	67.7
- Built-In Electric Wine Coolers/ Chillers	-	-	-
- Freestanding Electric Wine Coolers/ Chillers	12.0	10.9	67.7
Freezers	-	-	-
- Built-In Freezers	-	-	-
- Freestanding Freezers	-	-	-
Fridge Freezers	2.0	5.6	31.0
- Built-In Fridge Freezers	-	-	-
- Freestanding Fridge Freezers	2.0	5.6	31.0
Fridges	3.0	4.1	22.2
- Built-In Fridges	-	-	-
- Freestanding Fridges	3.0	4.1	22.2
Refrigeration Appliances	2.1	5.4	30.0
Microwaves	5.0	6.7	38.3
Built-In Major Appliances	12.1	18.9	137.2
Freestanding Major Appliances	3.3	6.2	34.8
Major Appliances	4.7	7.7	45.2

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

Table 28 Forecast Sales of Major Appliances by Category and by Built-in/Freestanding Split: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Built-In Dishwashers	7.9	46.1
Freestanding Dishwashers	6.2	35.3
Dishwashers	6.7	38.3
Built-In Home Laundry Appliances	-	-

Freestanding Home Laundry Appliances	3.8	20.5
Automatic Tumble Dryers	-	-
- Built-In Tumble Dryers	-	-
- Freestanding Tumble Dryers	-	-
Automatic Washer Dryers	6.0	33.6
- Built-In Washer Dryers	-	-
- Freestanding Washer Dryers	6.0	33.6
Automatic Washing Machines	3.8	20.5
- Built-In Automatic Washing Machines	-	-
- Freestanding Automatic Washing Machines	3.8	20.5
Semi-Automatic Washing Machines	-	-
Other Home Laundry Appliances	-	-
- Other Built-In Home Laundry Appliances	-	-
- Other Freestanding Home Laundry Appliances	-	-
Home Laundry Appliances	3.8	20.5
Built-In Large Cooking Appliances	18.2	131.1
Freestanding Large Cooking Appliances	4.0	21.8
Built-In Hobs	21.4	163.2
Ovens	-	-
Cooker Hoods	14.8	99.2
- Built-In Cooker Hoods	14.8	99.2
- Freestanding Cooker Hoods	-	-
Cookers	4.0	21.8
Range Cookers	-	-
Large Cooking Appliances	9.9	60.4
Built-In Microwaves	-	-
Freestanding Microwaves	1.4	7.1
Built-In Refrigeration Appliances	-	-
Freestanding Refrigeration Appliances	6.8	39.1
Electric Wine Coolers/Chillers	6.0	33.8
- Built-In Electric Wine Coolers/Chillers	-	-
- Freestanding Electric Wine Coolers/Chillers	6.0	33.8
Freezers	-	-
- Built-In Freezers	-	-
- Freestanding Freezers	-	-
Fridge Freezers	7.5	43.7
- Built-In Fridge Freezers	-	-
- Freestanding Fridge Freezers	7.5	43.7
Fridges	-7.1	-30.9
- Built-In Fridges	-	-
- Freestanding Fridges	-7.1	-30.9
Refrigeration Appliances	6.8	39.1
Microwaves	1.4	7.1
Built-In Major Appliances	18.2	131.0
Freestanding Major Appliances	5.6	31.1
Major Appliances	6.7	38.4

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

Table 29 Forecast Sales of Small Appliances by Category: Volume 2010-2015

'000 units

	2010	2011	2012	2013	2014	2015
Air Purifiers	-	-	-	-	-	-
Cooling	1,721.0	2,032.2	2,359.9	2,691.1	3,037.9	3,393.9
Dehumidifiers	-	-	-	-	-	-
Humidifiers	-	-	-	-	-	-
Other Air Treatment Products	-	-	-	-	-	-
Air Treatment Products	1,721.0	2,032.2	2,359.9	2,691.1	3,037.9	3,393.9
Blenders	704.9	714.4	724.7	736.0	748.2	761.3
Citrus Pressers	87.4	95.2	104.0	113.8	124.7	136.9
Food Processors	287.2	317.0	350.6	388.5	431.2	479.5

Grinders And Choppers	40.5	44.0	47.9	52.5	57.7	63.6
Juice Extractors	46.8	48.5	50.3	52.2	54.2	56.4
Mixers	10.5	11.9	13.5	15.2	17.0	18.7
Smoothie Makers	-	-	-	-	-	-
Other Food Preparation Appliances	-	-	-	-	-	-
Food Preparation Appliances	1,177.2	1,231.0	1,291.0	1,358.1	1,433.0	1,516.5
Convector Heaters	-	-	-	-	-	-
Electric Blankets	-	-	-	-	-	-
Electric Fires	-	-	-	-	-	-
Fan Heaters	15.8	16.3	16.7	17.2	17.5	17.9
Oil-Filled Radiators	-	-	-	-	-	-
Panel Heaters	-	-	-	-	-	-
Other Heating Appliances	-	-	-	-	-	-
Heating Appliances	15.8	16.3	16.7	17.2	17.5	17.9
Irons	1,295.4	1,379.6	1,462.3	1,542.8	1,619.9	1,692.8
Body Shavers	425.7	474.6	526.8	582.1	640.4	698.0
Hair Care Appliances	592.8	666.9	740.3	814.3	887.6	958.6
Oral Hygiene Appliances	-	-	-	-	-	-
Other Personal Care Appliances	-	-	-	-	-	-
Personal Care Appliances	1,018.5	1,141.5	1,267.1	1,396.4	1,527.9	1,656.6
Breadmakers	-	-	-	-	-	-
Coffee Machines	25.1	27.8	30.5	33.4	36.4	39.5
Deep Fat Fryers	-	-	-	-	-	-
Electric Grills	-	-	-	-	-	-
Electric Steamers	-	-	-	-	-	-
Freestanding Hobs	969.6	1,066.5	1,167.9	1,273.0	1,381.2	1,491.7
Mini Ovens	64.7	74.4	86.3	101.0	119.1	141.8
Rice Cookers	2,102.9	2,176.6	2,254.9	2,338.3	2,427.2	2,521.9
Rotisseries And Roasters	-	-	-	-	-	-
Sandwich Makers	45.5	50.9	56.0	61.0	65.9	70.5
Slow Cookers	-	-	-	-	-	-
Toasters	64.5	74.8	85.3	95.5	106.0	116.6
Waffle Makers	-	-	-	-	-	-
Other Small Cooking Appliances	-	-	-	-	-	-
Small Cooking Appliances	3,272.3	3,470.9	3,680.9	3,902.2	4,135.9	4,382.0
Coffee Mills	-	-	-	-	-	-
Food And Meat Slicers	-	-	-	-	-	-
Kettles	820.9	923.5	1,040.8	1,175.0	1,328.9	1,505.7
Other Small Kitchen Appliances (Non-Cooking)	-	-	-	-	-	-
Small Kitchen Appliances (Non-Cooking)	820.9	923.5	1,040.8	1,175.0	1,328.9	1,505.7
Cylinder Vacuum Cleaners	123.7	144.7	167.9	191.4	214.3	235.8
Stick Vacuum Cleaners	-	-	-	-	-	-
Handheld Vacuum Cleaners	-	-	-	-	-	-
Upright Vacuum Cleaners	-	-	-	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-	-	-	-
Other Vacuum Cleaners	-	-	-	-	-	-
Vacuum Cleaners	123.7	144.7	167.9	191.4	214.3	235.8
Small Appliances	9,444.6	10,339.7	11,286.6	12,274.2	13,315.4	14,401.0

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

Table 30 Forecast Sales of Small Appliances by Category: Value 2010-2015

VND billion

	2010	2011	2012	2013	2014	2015
Air Purifiers	-	-	-	-	-	-

Cooling	6,995.3	8,076.1	9,143.0	10,131.3	11,120.5	12,089.2
Dehumidifiers	-	-	-	-	-	-
Humidifiers	-	-	-	-	-	-
Other Air Treatment Products	-	-	-	-	-	-
Air Treatment Products	6,995.3	8,076.1	9,143.0	10,131.3	11,120.5	12,089.2
Blenders	380.6	385.4	390.7	396.5	402.7	409.5
Citrus Pressers	55.1	59.3	63.9	69.0	74.6	80.9
Food Processors	206.5	225.1	245.8	269.0	294.5	322.8
Grinders And Choppers	17.6	19.0	20.7	22.5	24.7	27.1
Juice Extractors	19.2	19.8	20.5	21.1	21.9	22.6
Mixers	9.6	11.1	12.7	14.3	16.0	17.6
Smoothie Makers	-	-	-	-	-	-
Other Food Preparation Appliances	-	-	-	-	-	-
Food Preparation Appliances	688.6	719.7	754.2	792.4	834.4	880.5
Convector Heaters	-	-	-	-	-	-
Electric Blankets	-	-	-	-	-	-
Electric Fires	-	-	-	-	-	-
Fan Heaters	16.4	16.9	17.4	17.8	18.2	18.5
Oil-Filled Radiators	-	-	-	-	-	-
Panel Heaters	-	-	-	-	-	-
Other Heating Appliances	-	-	-	-	-	-
Heating Appliances	16.4	16.9	17.4	17.8	18.2	18.5
Irons	409.3	417.9	426.2	433.9	439.5	444.4
Body Shavers	422.4	447.7	479.1	515.0	556.2	603.5
Hair Care Appliances	251.6	265.4	282.7	303.9	327.3	353.1
Oral Hygiene Appliances	-	-	-	-	-	-
Other Personal Care Appliances	-	-	-	-	-	-
Personal Care Appliances	674.0	713.1	761.7	818.9	883.4	956.6
Breadmakers	-	-	-	-	-	-
Coffee Machines	19.1	20.9	22.8	24.8	26.9	29.0
Deep Fat Fryers	-	-	-	-	-	-
Electric Grills	-	-	-	-	-	-
Electric Steamers	-	-	-	-	-	-
Freestanding Hobs	642.6	658.6	685.0	717.9	755.2	796.7
Mini Ovens	44.3	47.7	52.7	59.3	67.6	77.7
Rice Cookers	996.3	1,030.2	1,067.3	1,107.8	1,151.0	1,197.1
Rotisseries And Roasters	-	-	-	-	-	-
Sandwich Makers	20.4	22.9	25.3	27.6	29.9	32.0
Slow Cookers	-	-	-	-	-	-
Toasters	20.2	23.4	26.5	29.5	32.5	35.5
Waffle Makers	-	-	-	-	-	-
Other Small Cooking Appliances	-	-	-	-	-	-
Small Cooking Appliances	1,742.9	1,803.7	1,879.6	1,967.0	2,063.1	2,168.0
Coffee Mills	-	-	-	-	-	-
Food And Meat Slicers	-	-	-	-	-	-
Kettles	328.0	339.9	364.7	397.1	433.3	473.6
Other Small Kitchen Appliances (Non-Cooking)	-	-	-	-	-	-
Small Kitchen Appliances (Non-Cooking)	328.0	339.9	364.7	397.1	433.3	473.6
Cylinder Vacuum Cleaners	208.5	240.2	274.6	308.9	341.6	371.3
Stick Vacuum Cleaners	-	-	-	-	-	-
Handheld Vacuum Cleaners	-	-	-	-	-	-
Upright Vacuum Cleaners	-	-	-	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-	-	-	-
Other Vacuum Cleaners	-	-	-	-	-	-
Vacuum Cleaners	208.5	240.2	274.6	308.9	341.6	371.3
Small Appliances	11,063.1	12,327.5	13,621.3	14,867.2	16,134.0	17,402.0

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

Table 31 Forecast Sales of Small Appliances by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
Air Purifiers	-	-	-
Cooling	11.7	14.5	97.2
Dehumidifiers	-	-	-
Humidifiers	-	-	-
Other Air Treatment Products	-	-	-
Air Treatment Products	11.7	14.5	97.2
Blenders	1.8	1.6	8.0
Citrus Pressers	9.8	9.4	56.7
Food Processors	11.2	10.8	67.0
Grinders And Choppers	10.2	9.4	57.0
Juice Extractors	4.0	3.8	20.5
Mixers	10.4	12.3	78.9
Smoothie Makers	-	-	-
Other Food Preparation Appliances	-	-	-
Food Preparation Appliances	5.8	5.2	28.8
Convector Heaters	-	-	-
Electric Blankets	-	-	-
Electric Fires	-	-	-
Fan Heaters	1.9	2.5	13.4
Oil-Filled Radiators	-	-	-
Panel Heaters	-	-	-
Other Heating Appliances	-	-	-
Heating Appliances	1.9	2.5	13.4
Irons	4.5	5.5	30.7
Body Shavers	9.0	10.4	64.0
Hair Care Appliances	8.0	10.1	61.7
Oral Hygiene Appliances	-	-	-
Other Personal Care Appliances	-	-	-
Personal Care Appliances	8.4	10.2	62.7
Breadmakers	-	-	-
Coffee Machines	8.5	9.5	57.4
Deep Fat Fryers	-	-	-
Electric Grills	-	-	-
Electric Steamers	-	-	-
Freestanding Hobs	8.0	9.0	53.8
Mini Ovens	19.0	17.0	119.2
Rice Cookers	3.9	3.7	19.9
Rotisseries And Roasters	-	-	-
Sandwich Makers	7.0	9.2	55.2
Slow Cookers	-	-	-
Toasters	10.0	12.6	80.8
Waffle Makers	-	-	-
Other Small Cooking Appliances	-	-	-
Small Cooking Appliances	6.0	6.0	33.9
Coffee Mills	-	-	-
Food And Meat Slicers	-	-	-
Kettles	13.3	12.9	83.4
Other Small Kitchen Appliances (Non-Cooking)	-	-	-
Small Kitchen Appliances (Non-Cooking)	13.3	12.9	83.4
Cylinder Vacuum Cleaners	10.0	13.8	90.6
Stick Vacuum Cleaners	-	-	-
Handheld Vacuum Cleaners	-	-	-
Upright Vacuum Cleaners	-	-	-
Wet And Dry Vacuum Cleaners	-	-	-
Other Vacuum Cleaners	-	-	-
Vacuum Cleaners	10.0	13.8	90.6
Small Appliances	8.2	8.8	52.5

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

Table 32 Forecast Sales of Small Appliances by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Air Purifiers	-	-
Cooling	11.6	72.8
Dehumidifiers	-	-
Humidifiers	-	-
Other Air Treatment Products	-	-
Air Treatment Products	11.6	72.8
Blenders	1.5	7.6
Citrus Pressers	8.0	46.9
Food Processors	9.3	56.3
Grinders And Choppers	9.0	54.1
Juice Extractors	3.3	17.6
Mixers	12.8	82.8
Smoothie Makers	-	-
Other Food Preparation Appliances	-	-
Food Preparation Appliances	5.0	27.9
Convector Heaters	-	-
Electric Blankets	-	-
Electric Fires	-	-
Fan Heaters	2.4	12.5
Oil-Filled Radiators	-	-
Panel Heaters	-	-
Other Heating Appliances	-	-
Heating Appliances	2.4	12.5
Irons	1.7	8.6
Body Shavers	7.4	42.9
Hair Care Appliances	7.0	40.4
Oral Hygiene Appliances	-	-
Other Personal Care Appliances	-	-
Personal Care Appliances	7.3	41.9
Breadmakers	-	-
Coffee Machines	8.8	52.4
Deep Fat Fryers	-	-
Electric Grills	-	-
Electric Steamers	-	-
Freestanding Hobs	4.4	24.0
Mini Ovens	11.9	75.2
Rice Cookers	3.7	20.2
Rotisseries And Roasters	-	-
Sandwich Makers	9.5	57.3
Slow Cookers	-	-
Toasters	11.9	75.1
Waffle Makers	-	-
Other Small Cooking Appliances	-	-
Small Cooking Appliances	4.5	24.4
Coffee Mills	-	-
Food And Meat Slicers	-	-
Kettles	7.6	44.4
Other Small Kitchen Appliances (Non-Cooking)	-	-
Small Kitchen Appliances (Non-Cooking)	7.6	44.4
Cylinder Vacuum Cleaners	12.2	78.1
Stick Vacuum Cleaners	-	-
Handheld Vacuum Cleaners	-	-
Upright Vacuum Cleaners	-	-
Wet And Dry Vacuum Cleaners	-	-
Other Vacuum Cleaners	-	-
Vacuum Cleaners	12.2	78.1

Small Appliances	9.5	57.3

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

DEFINITIONS

This report analyses the market for Consumer Appliances in Vietnam during 2004-2014. For the purposes of the study, the market has been defined as follows:

- Refrigeration appliances
- Home laundry appliances
- Dishwashers
- Large cooking appliances
- Microwaves
- Food preparation appliances
- Small cooking appliances
- Small kitchen appliances (Non-cooking)
- Vacuum cleaners
- Irons
- Personal care appliances
- Heating
- Air treatment

The market is measured in terms of retail sales and in sell-out terms rather than shipment or sell-in sales by manufacturers. Retail sales of consumer appliances include both replacement sales and new sales. For example repurchases of the same product and first-time buyer sales. Retail sales also include sales of fitted appliances through fitted kitchen sales and sales to the building industry for installation in new housing units. Sales to industrial and foodservice users are excluded, in addition to second-hand sales.

Category and Subcategory Definitions

Refrigeration appliances

The refrigeration appliances category includes freestanding or built-in refrigerators across a variety of formats and which can be frost free or standard. The subcategory breakdown is as follows:

- Fridge freezers: usually 2- or 3-door appliances with separate units for refrigeration and freezing operations
- Fridges: standard fridges and larder fridges, which come with or without a small icebox
- Freezers: separate freezers
- Electric wine coolers/ chillers: specifically designed for storing bottles of wine in order to keep them at the correct temperature.

Breakdowns are given for built-in and freestanding appliances by subcategory and refrigeration volume capacity. Additional product sub-subcategorisation is provided for:

- Fridge freezers by single door/double door freezer bottom/double door freezer top/side by side/3-door French/3-door Vertical/4+ door
- Fridges by upright/tables top/compact/drawer
- Freezers by upright/table top/chest/drawer

- Electric wine coolers/ chillers by single or double door

A further subcategory breakdown is provided where available, e.g. static/frost free split for fridge freezers and fridges.

Home laundry appliances

The home laundry appliances category includes freestanding and built-in units. The breakdown between built-in and freestanding is provided at overall category level. The subcategory breakdown is as follows:

- Automatic washing machines: automatic washing machines are pre-programmable and incorporate a spin-dryer
- Semi-automatic washing machines: unlike automatic washing machines which only require that you put in clothes and detergent and then choose a programme, semi-automatics requires additional manual input. Typically the process consists of a) putting in the clothes, detergent and water, b) draining when the wash is complete, c) adding new water to rinse, d) drain it again and e) spin. All of this is done manually.
- Automatic washer dryers: washer dryers combine both washing machine and tumble dryer functions
- Automatic tumble dryers: automatic tumble dryers use the action of a rotating drum and heat to dry the laundry
- Others: includes spin-dryers (spin-dryers are cylindrical with top loading), twin tubs etc

Additional product sub-subcategorisation is provided for the home laundry categories by format and also washing machine capacity. Formats include the following:

- Automatic washing machines by front loading/top loading split
- Automatic tumble dryer by vented and condenser

Dishwashers

The dishwasher's category includes freestanding, portable and built-in units. The breakdown between built-in and freestanding is provided at overall category level.

Subcategory breakdown is provided where available by format these include slimline, full-size, compact, table-top (designed to sit on top of the work surface), and dishdrawers. A further breakdown analyses semi integrated versus full-integrated units.

Large cooking appliances

The large cooking appliances category includes gas or electric, cookers, ranges, ovens, built-in hobs and cooker hoods. They are tracked as freestanding and/or built-in where applicable. The subcategory breakdown is as follows:

- Cookers: Western-style cookers are normally floor-standing appliances with oven, grill and hot plate facilities
- Range cookers: Larger usually free-standing cookers although can also built-in. Widths of 80 – 150cm, with most models having twin ovens arranged side by side.
- Ovens: usually double ovens with two cavities, some circulate heat with a fan, i.e. a fan oven
- Built-in hobs: a hotplate with four areas for heating saucepans and other vessels, sold as a separate item not attached to a cooker
- Cooker hoods: includes canopy, standard, integrated, telescopic and chimney hoods; includes vents

Breakdowns are given for built-in and freestanding appliances by subcategory. Additional product sub-subcategorisation is provided for:

- Cookers by gas/electric/duel fuel split

- Range cookers by gas/electric/duel fuel and other split
- Ovens by standard/multifunction split
- Built-in hobs by gas/standard electric/mixed/vitroceramic/induction split

A further subcategory breakdown is provided where available, e.g. ovens by single oven/double oven split.

Microwaves

The microwaves category encompasses standard microwaves, combination microwaves (combines full microwave and conventional oven facilities) and microwave grills (with radiant grill function).

Breakdowns are given for built-in and freestanding appliances by subcategory. Additional information analysing microwaves with standard versus combination is also available.

Food preparation appliances

Food preparation appliances include food processors, table top blenders and mixers and hand-held blenders and mixers, juice extractors, smoothie makers, choppers and grinders, citrus pressers and other food preparation appliances including items, such as electric pasta makers, electric mincers and electric whisks.

Small cooking appliances

Small cooking appliances cover coffee machines, bread makers, electric grills, deep fat fryers, freestanding hobs, electric steamers, toasters, mini ovens (toaster and tabletop), sandwich makers, slow cookers, waffle makers, rice cookers, rotisseries and roasters and other small cooking appliances including items, such as fondue sets.

Breakdowns are given for coffee machines by format these include espresso machines, percolators, filter coffee machines, combination and hard coffee pods and soft coffee pods.

Breakdowns are given for freestanding hobs by gas/standard electric/mixed/vitroceramic/induction split.

Small kitchen appliances

Small kitchen appliances include coffee mills, food and meat slicers, kettles and others small kitchen appliances which includes electric can openers, electric graters and knife sharpeners.

Vacuum cleaners

Vacuum cleaners break down into the following subcategories.

- Upright: self-contained and has a handle extending vertically from its main case.
- Cylinder: sits horizontally to the floor and is pulled around by means of a hose and wand handle.
- Wet and dry: a specialised form of the vacuum cleaner—can be used to clean up wet or liquid spills and can also be used to clean the carpet.
- Handheld: Battery-operated or electric, used primarily for cleaning up smaller spills.
- Stick: Stick vacuums are less powerful than standard upright vacuum cleaners with smaller capacity. Also includes multi functioning stick vacuum cleaners (i.e. lower part can be pulled off for use as a handheld).
- Other vacuum cleaners: includes steam cleaners and robotic vacuum cleaners.
- Additional analysis focusing on bag versus bagless vacuum cleaners and rechargeable versus mains.

Irons

The irons category encompasses the following subcategories:

- Steam

- Dry
- Travel
- Steam generator

Additional analysis focusing on rechargable versus mains irons

Personal care appliances

Hair care appliances: includes hairdryers, hair styling appliances, and hair and beard trimmers. A further subcategory breakdown is provided where available.

- Body shavers: includes men's shavers, women's shavers and depilators. A further subcategory breakdown is provided where available.
- Oral hygiene appliances: electric toothbrushes, and others, such as electric plaque removers.
- Other personal care appliances: includes waxers, facial saunas, facial solarium, food spa, facial massagers and body toners.

Air treatment

The air treatment appliance category encompasses the following subcategories:

- Air conditioners, which is split into room air conditioners, splits air conditioners and windown air conditioners
- Cooling fans, which is split into desk and standing fans
- Ceiling fans
- Dehumidifiers
- Humidifiers
- Air coolers
- Air purifiers
- Other air treatment

Heating appliances

The heating and cooling appliances category encompasses the following subcategories:

- Oil filled radiator
- Electric fires
- Convector heaters
- Panel heaters
- Fan heaters
- Electric blankets
- Other heating appliances

Distribution Definitions

- Specialist multiples: or chains that specialise in electrical household appliances. A chain is defined by operating 10 or more outlets.
- Specialist independents: independent retailers specialising in the sale of domestic electrical appliances. Independents are defined by operating less than 10 outlets.

- Kitchen specialists: Retail outlets with several stores specialising in the sale of kitchens (usually fitted kitchens) that also sell appliances with the kitchens.
- Grocery multiples: Retailers selling predominantly food/beverages and non-food products in addition to other everyday groceries. This is the aggregation of hypermarkets, supermarkets and discounters.
- Department/variety stores: sell mainly non-food merchandise and at least five lines in different departments. Department stores are chained or independent retail outlets with a primary focus on selling a range of non-food/drink/tobacco merchandise across several categories in different departments.
- Builders Merchants: are trade outlets (similar to wholesalers) that sell to smaller builders and property developers, but also to individual consumers. When consumers buy directly from Builders Merchants they pay tax (VAT / GST) and while prices may be lower, this is just like any regular retail purchase.
- Construction: sales to directly by manufacturers or sometimes through wholesalers to construction companies for installation, often fitted kitchens, in new housing units.
- Catalogue showrooms: products are viewed in a catalogue and purchases are ordered in the showroom.
- Homeshopping: the sale of consumer goods to the general public via mail order catalogues, TV shopping and direct mail. Homeshopping transactions involve consumers purchasing goods in direct response to an advertisement or promotion through a mail item, printed catalogue, TV shopping programme, or internet catalogue whereby the order is placed and payment is made by phone, by post or through other media such as digital TV.
- The internet: the sale of consumer goods to the general public via the internet.
- Other: includes sales from door-to-door selling; mass merchandisers, warehouse clubs etc.

Units of measurement

- Market volume is measured in terms of the number of units sold through retail outlets.
- Market value is measured at current retail prices in local currency, i.e. the market value is measured in terms of the actual spending by consumers in retail outlets.
- Brand and market shares are based on retail unit volume sales.
- Retail distribution is measured in unit volume sales through retail outlets.

Sources

Sources used during research include the following:

Summary 1 Research Sources

Official Sources	Danang People's Committee
	Statistical Office in Ho Chi Minh City
Trade Press	Sai Gon Tiep Thi
	Thanh Nien
	Tuoi Tre
	VNEconomy

Source: Euromonitor International