

A Study of the Indian Consumer Durables Sector

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Abstracts

Executive Summary

The consumer durables sector includes consumer appliances and consumer electronics. The consumer appliances sector includes air conditioners, refrigerators, washing machines, sewing machines, electric fans, cleaning equipment, microwave ovens and other domestic appliances. Consumer electronics include televisions, audio and video systems, electronic accessories, CD and DVD players, digital cameras and camcorders.

By 2025, it is expected that India is will become the fifth largest consumer durables market globally. The consumer durables industry is projected to double at 14.8% CAGR to reach approximately USD 12.5 billion in FY15 from USD 6.3 billion in FY10.

At present, more than 77% of households in urban India have a television, 33% own a refrigerator, 17% have an air cooler, and 13% own a washing machine. Air conditioner penetration in India compares unfavorably with other developing markets, especially Asian countries, along with the other consumer durables categories within the country.

The improving living standards have made home washing machines an essential consumer good in the Indian market. The changing environmental dynamics, urbanization and rising income levels are driving the growth of this segment that was once inhibited by the high price point. The Indian refrigerator market was worth INR 41 billion in 2009 and is projected to reach INR 223 billion by 2020. Although the market has been growing, it still remains underpenetrated. Market penetration of refrigerators in India is 21% as compared with the global average of 85%.

The Indian television market is shifting from the traditional cathode ray tube (CRT) technology to LED, LCD and Plasma televisions. Some leading players have officially

stopped the production of CRT televisions and are now concentrating on LED TV's. While in 2012 CRT sales stood at 7 million units and flat panels stood at 5 million units, in 2014 CRT sales were only 2.5 million units while flat panel sales stood at close to 9 million units. It is expected the TV industry revenue will reach INR 130,500 crore by 2020. TVs form the next largest imports in the consumer durables sector behind air conditioners in India.

Why should the report be purchased?

The report 'A Study of the Indian Consumer Durables Sector' highlights the key dynamics of India's consumer durables sector. The potential of the sector has been investigated along with key challenges. The current market scenario and future prospects of the sector have been studied. The air conditioner, washing machine, television and refrigerator sectors have been studied in detail. Key players operating in the consumer durables sector including Voltas Ltd., Blue Star Ltd., Hitachi Ltd., LG Electronics India Pvt. Ltd., AB Electrolux, Panasonic Corp., Samsung, Carrier Corp., Whirlpool, IFB, Videocon have been profiled. The report contains latest verbatim of industry experts.

Research methodology and delivery time

Smart Research Insights has conducted in depth secondary research to arrive at key insights. Data collected from key public industry sources and publications has been scanned and analyzed impartially to present a clear picture of the industry. All recent developments which impact the sector dynamics have been captured and used to support the research hypothesis.

The report is available as single-site single-user license and the delivery time for the electronic version of the report is 3 business days. The dispatch time for hard copies is 4 business days, as each hard copy is custom printed for the client.

About Smart Research Insights (SRI)

SRI is a research organization specializing in industry research reports and custom research. Our team of dedicated researchers with rich experience across industry segments focuses on delivering high quality analysis. Undertaking in-depth secondary research we arrive at key insights, which are supported by data that has been analyzed impartially to present a clear picture of the industry. All recent developments and industry opinions which impact the sector dynamics are captured and used to support

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