

Decoding US White Goods Market with Data

REPORT VERSION 1

FOR **JANUARY**



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Executive Summary

The market for large appliances has been expanding rapidly with consumers investing a significant amount of money in essential household appliances. As marketplaces gain prominence and importance, it is imperative for retailers to stay abreast of the latest trends and insights.

This report seeks to provide a comprehensive analysis of the white goods category across the three major marketplaces.

This comprehensive report is on the white goods category in the large appliance department across **Amazon, Walmart, and Wayfair** marketplaces.

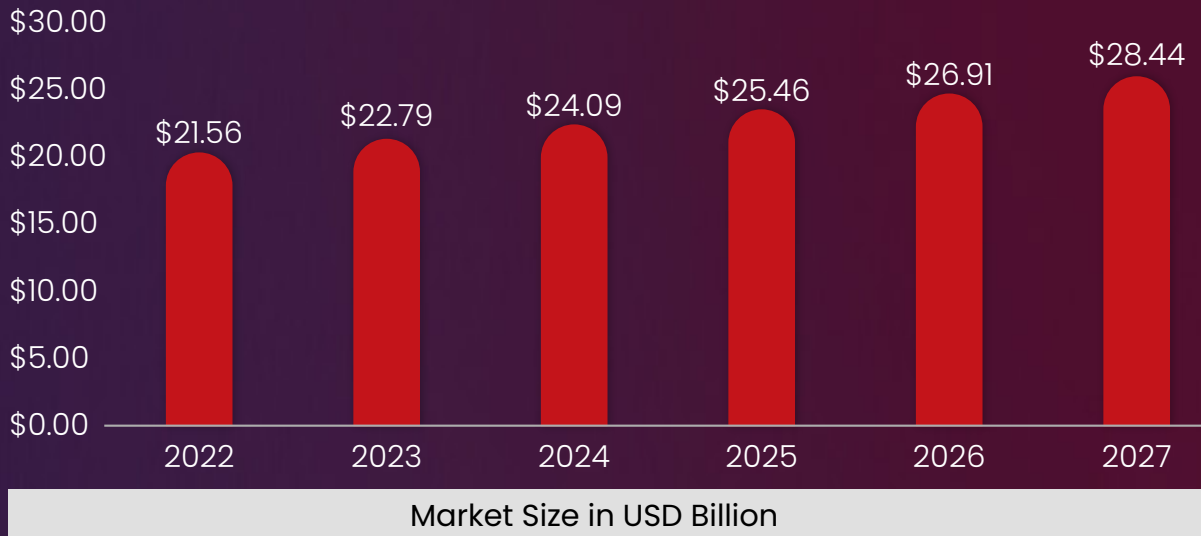
The report focuses on white goods, including air conditioners, clothes dryers, dishwashers, freezers, microwave ovens, and refrigerators, and answers crucial questions such as product concentration, marketplace leader based on product size, and pricing comparison with competitors. The report also delves into leading brands in each category and the contribution of private labels and brands across marketplaces for each category.

The insights presented in this report will prove invaluable to retailers looking to enhance their marketplace strategy and to investors seeking a better understanding of the eCommerce industry dynamics. By delving deep into marketplace data and customer feedback, this report provides a clear understanding of the most significant trends and changes in the marketplace landscape.



Background : Decoding Market Size of Large Appliances in USA

U.S. E-Commerce Household Appliances Market



Source: www.grandviewresearch.com

Over the past few years, the eCommerce industry for household appliances in the United States has shown extraordinary growth. The convenience and ease of online purchasing for customers, combined with increased internet penetration, has been the key driving force behind this expansion. With the rise of eCommerce, people can now buy appliances from the comfort of their own homes, rather than needing to visit physical stores, saving time and effort.



It is worth noting that this expansion is expected to continue in the future, with forecasts indicating that the market will grow at a compound annual growth rate

**(CAGR) of
5.7% through
2028.**

The expansion of product offerings and services has been a major contributor to this growth as well as delivery possibilities provided by online retailers such as Amazon and Walmart. Some companies have greatly expanded their product offerings and shipping choices, giving customers more alternatives and making it easier to buy appliances online.

Furthermore, the COVID-19 epidemic has pushed the practice of buying household equipment online. Due to the **temporary closure of physical storefronts**, many consumers have turned to eCommerce sites to purchase their appliances. Moreover, while social distancing measures are being observed, contactless delivery solutions have become more popular, enabling consumers to acquire their goods without having to interact physically with delivery staff.

Overall, the expansion of the eCommerce industry for household appliances in the United States may be linked to a number of factors, including rising internet penetration and consumer convenience. It will be interesting to see how this market continues to evolve in the coming years, and how retailers adapt to changing consumer preferences and behaviors.



Distribution of Catalogs Across Different Categories

The consumer appliance sector in the United States provides a varied range of items that respond to customers' demands and requirements.

Refrigerators dominate the appliance catalog in the United States, accounting for 39% of the total market share.

Air conditioners come in second with **30% of the Market.**

followed by microwave ovens and dishwashers with **11% and 8%, respectively.**



Freezers and clothes dryers

are tied for **sixth place with 6% apiece**, indicating that they are not as popular as the other appliances mentioned.

Merchandize Split Across Marketplaces

	Wayfair	Walmart	Amazon
Air Conditioner	1059	836	910
Clothes Dryer	473	165	128
Dishwasher	76	194	267
Freezer	131	191	249
Microwave Oven	173	542	315
Refrigerator	1446	641	1548
Total	3358	2458	3417

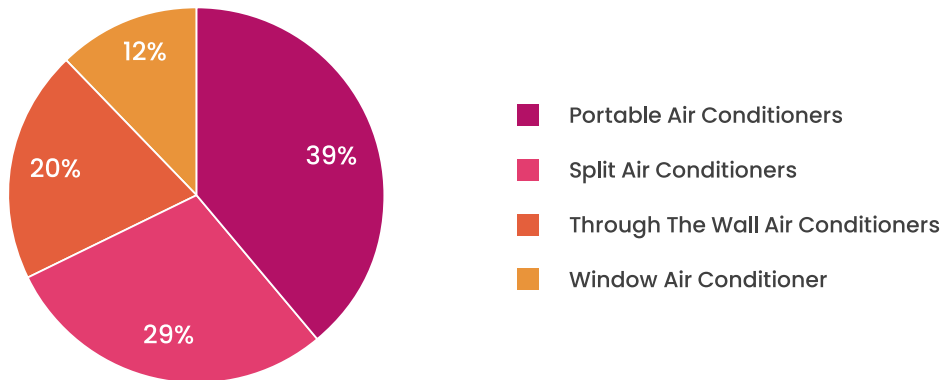
Analyzing the data further reveals that Amazon leads the competition in the white goods sector, with the most products available on its website. When it comes to product size, Wayfair leads in the air conditioner and clothes dryer categories. Amazon, on the other hand, dominates the dishwasher, freezer, and refrigerator categories. In the microwave oven category, Walmart outperforms its competitors.

Furthermore, as the population grows and lifestyles change, the demand for these appliances is expected to rise. As a result, in order to match client expectations and remain competitive, businesses will need to constantly develop and enhance their product offerings. Customers must also make informed judgments and select appliances that meet their demands and budget.

Distribution of Catalogs Across Different Categories

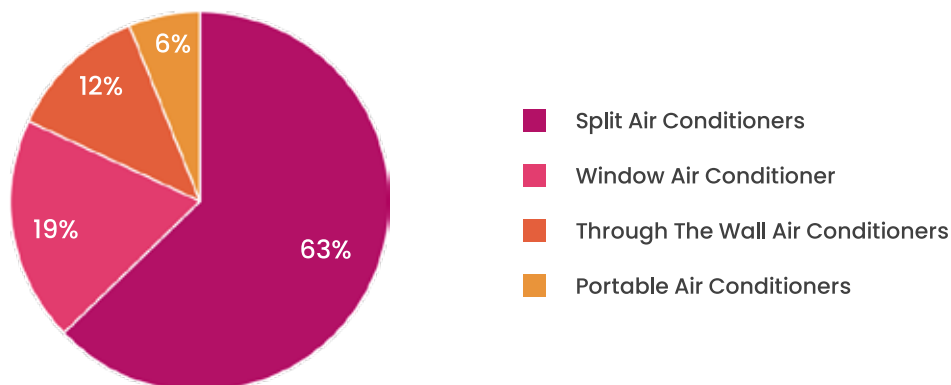
Analysis of **Air Conditioner** – ...

Air Conditioner Distribution: **Amazon**



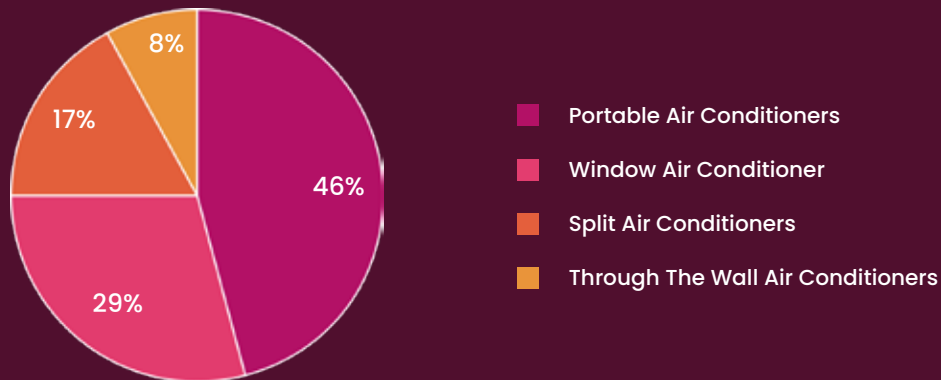
Amazon offers a comprehensive range of air conditioning solutions to meet the interests and needs of its customers. Air conditioner category mostly comprises **39%** Portable Air Conditioners, followed by Split Air Conditioner (**29%**), Through The Wall Air Conditioner (**20%**) and Window Air Conditioner (**12%**) on Amazon.

Air Conditioner Distribution: **Walmart**



Walmart offers a diverse selection of products to cater to the varying preferences and requirements of consumers. Split Air Conditioner has the highest density at **63%**, followed by Window Air Conditioners (**19%**), Through The Wall Air Conditioners (**12%**) and Portable Air Conditioners (**6%**) on Walmart.

Air Conditioner Distribution: **Wayfair**

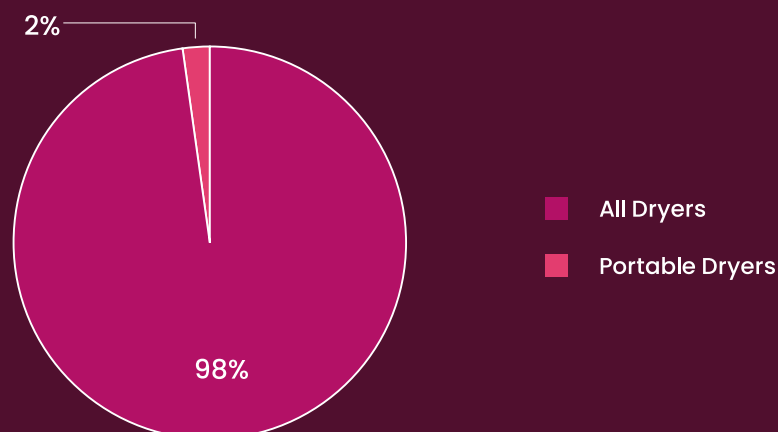


Wayfair, a renowned online home goods retailer, provides a wide choice of air conditioning units to cater to the varying needs and preferences of consumers. According to the analysis, Portable Air Conditioners made up most of the category (**46%**), followed by Window Air Conditioners (**29%**), Split Air Conditioners (**17%**) and Through The Wall Air Conditioners (**8%**).

The above data results in Portable Air Conditioners being the leaders on both Amazon and Wayfair, but on Walmart their density is the least.

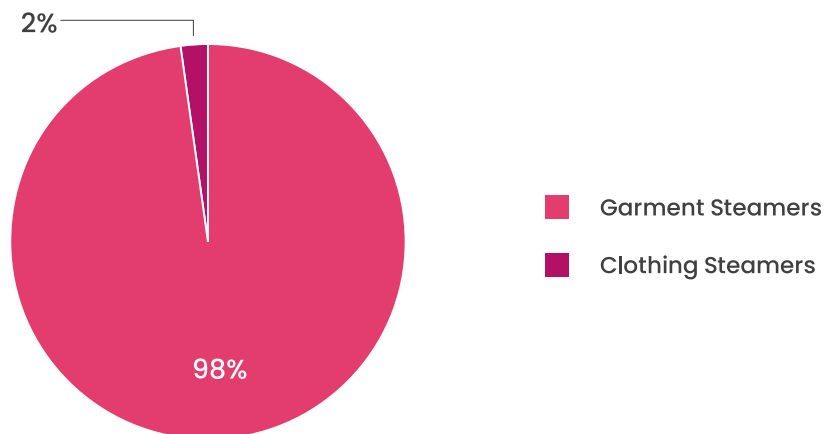
Analysis of **Clothes Dryer**

Clothes Dryer Distribution: **Amazon**



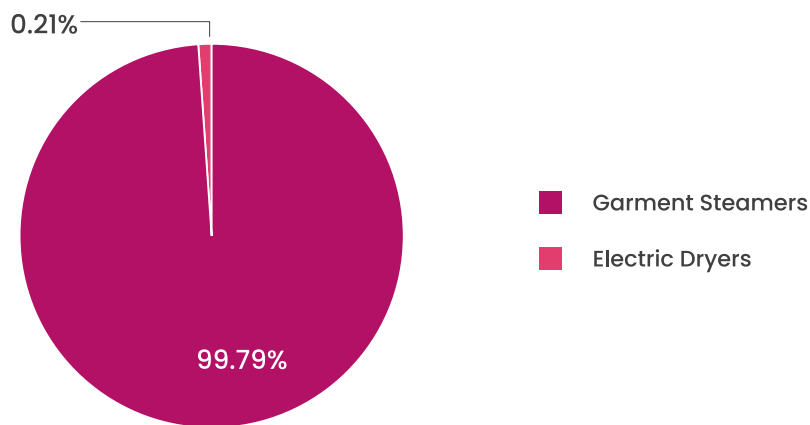
All dryers, which account for **98%** of the Clothes Dryer category on Amazon, are designed to dry clothing in quantity and to meet the needs of large families or households. Portable dryers, which account for less than **2%** of the market, are designed to be compact and portable.

Clothes Dryer Distribution: **Walmart**



A closer look at Walmart's clothes steamer category reveals that there are essentially two subcategories of clothing steamers available: clothing steamers and garment steamers. Clothes Steamers (**98%**), followed by Garment Steamers (**2%**), are the most popular at Walmart.

Clothes Dryer Distribution: **Wayfair**



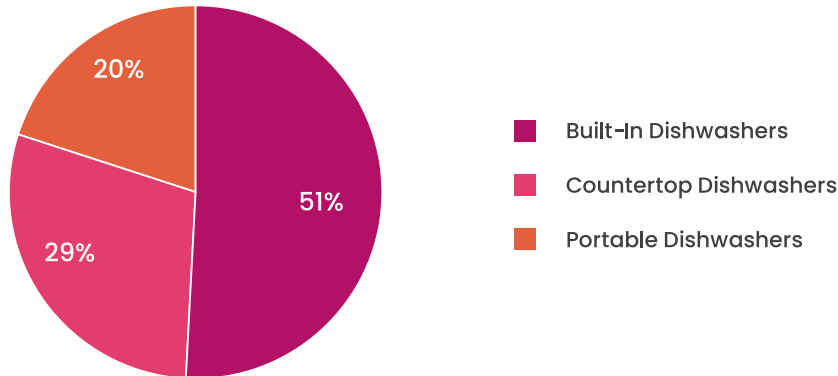
Wayfair, an eCommerce company specializing in home goods, offers a range of garment steamers and electric dryers. Garment Steamers (**99.79%**) are the most popular on Wayfair, with Electric Dryers accounting for only **0.21%** of all products.

On both Walmart and Wayfair, Garment Steamers seem to have the majority share.

Analysis of Dishwasher

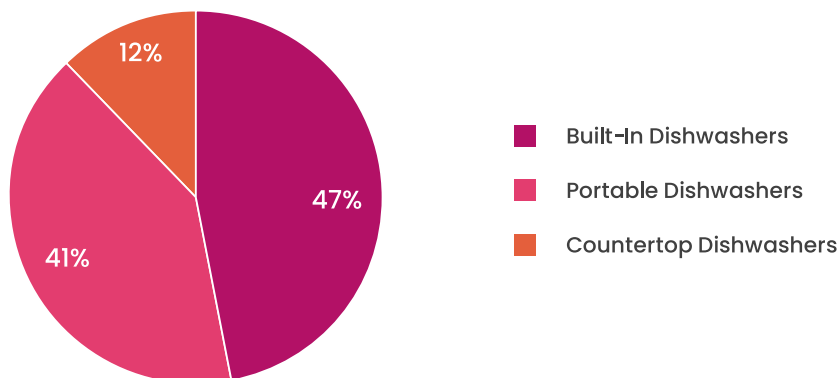


Dishwasher Distribution: Amazon



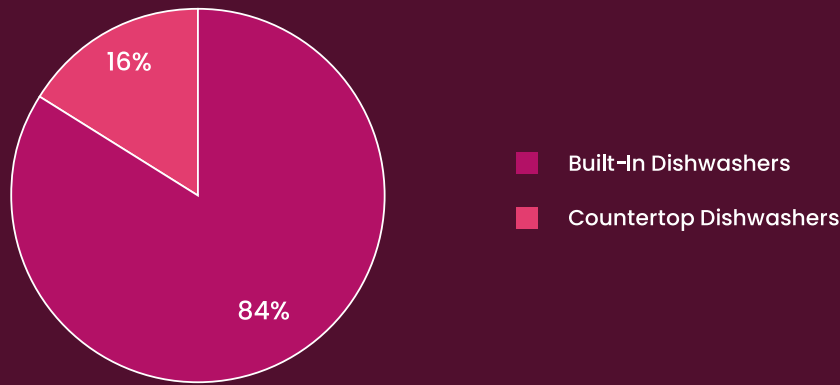
Amazon, the world's largest online retailer, offers a vast range of home appliances, including dishwashers. Built-in Dishwashers made up most of the Dishwasher category with **51%** density. This was followed by Countertop Dishwashers (**29%**) and Portable Dishwashers (**20%**) on Amazon.

Dishwasher Distribution: Walmart



Walmart also offers a wide range of dishwashers to its customers. Like Amazon, Built-in Dishwashers have the majority with **47%** density, which is followed by Portable Dishwashers (**41%**) and Countertop Dishwashers (**12%**) on Walmart.

Dishwasher Distribution: **Wayfair**



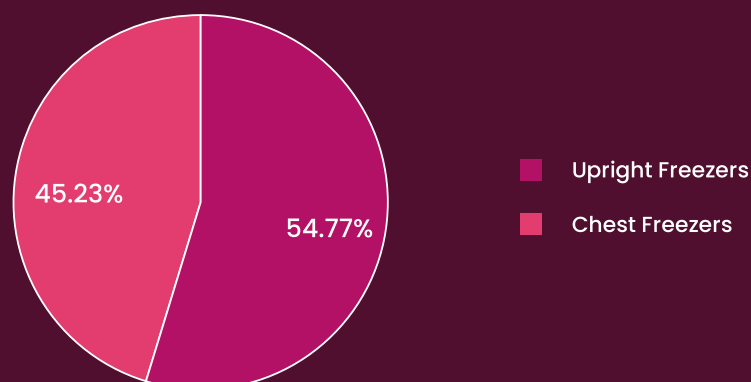
Wayfair specializes in home furnishings and decor. Among the various types of dishwashers available, built-in dishwashers and countertop dishwashers are the most popular. Built-in Dishwashers have the highest density on Wayfair as well with **84%** and Countertop

Dishwashers have 16% density.

It is interesting to note that Built-in Dishwashers have the highest density, but the density is almost double on Wayfair. Portable Dishwashers have a fair share on both Amazon and Walmart but are not present on Wayfair

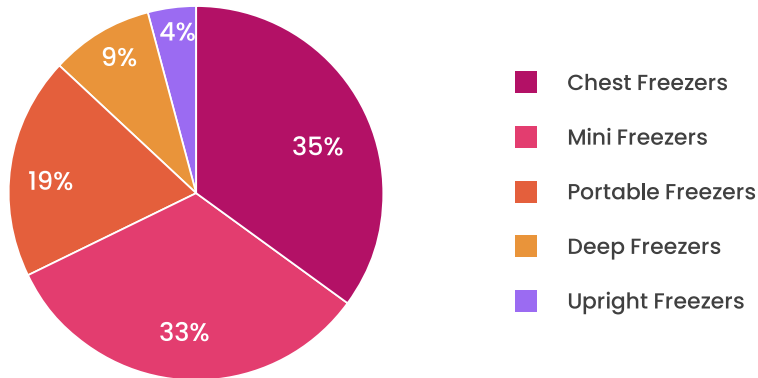
Analysis of **Freezer**

Freezer Distribution: **Amazon**



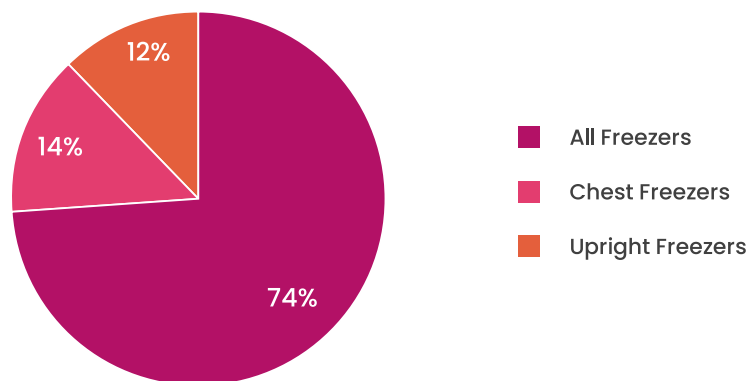
Amazon offers a wide variety of freezers to its customers. Among the different types of freezers available on the website, Upright Freezers has the majority with **54.7%** density, followed by Chest Freezers with **45.23%** density.

Freezer Distribution: Walmart



According to the sales data, chest freezers are the most popular type of freezer on Walmart, with a share of **35%**, followed by Mini Freezers (**33%**), Portable Freezers (**19%**), Deep Freezers (**9%**) and Upright Freezers (**4%**).

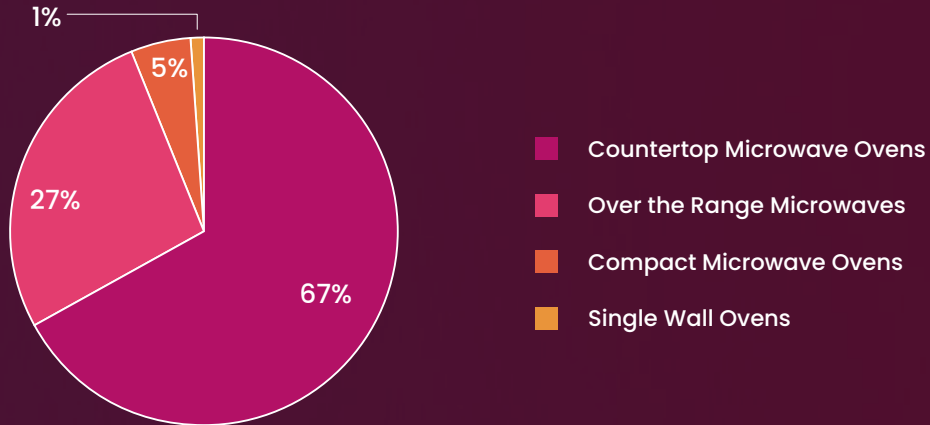
Freezer Distribution: Wayfair



According to the sales data, the All Freezer category has the highest density on Wayfair with **74%**, which is followed by Chest Freezers (**14%**) and Upright Freezers (**12%**).

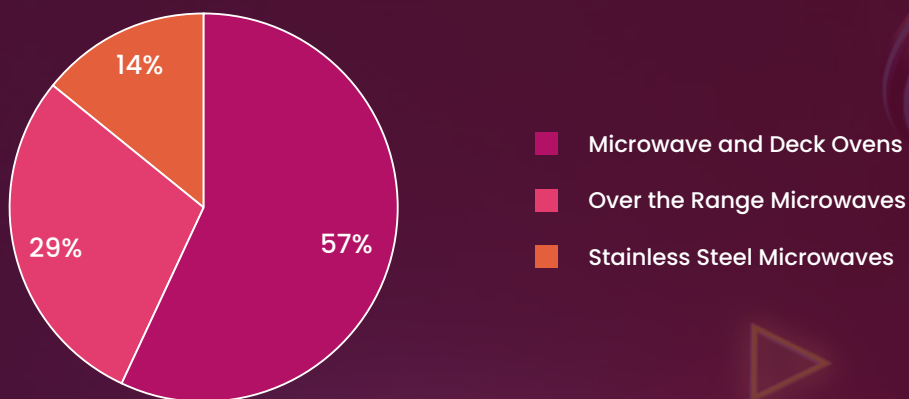
Analysis of Microwave

Microwave Oven Distribution: Amazon



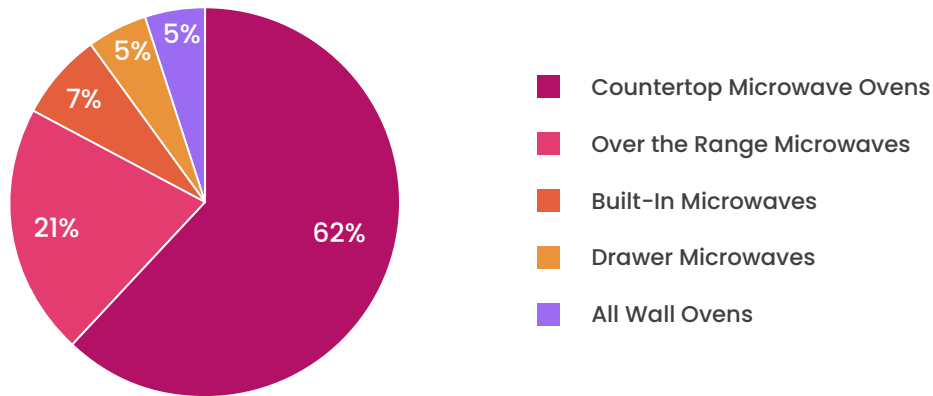
Countertop Microwave Ovens has the major density on Amazon with **67%**. Over the Range Microwaves has **27%**, Compact Microwave Ovens has **5%** and the rest have approximately **1%** density.

Microwave Oven Distribution: Walmart



Microwave and Deck Ovens have the most share of **57%** on Walmart followed by Over the Range Microwaves with **29%** share and Stainless Steel Microwaves with **14%**.

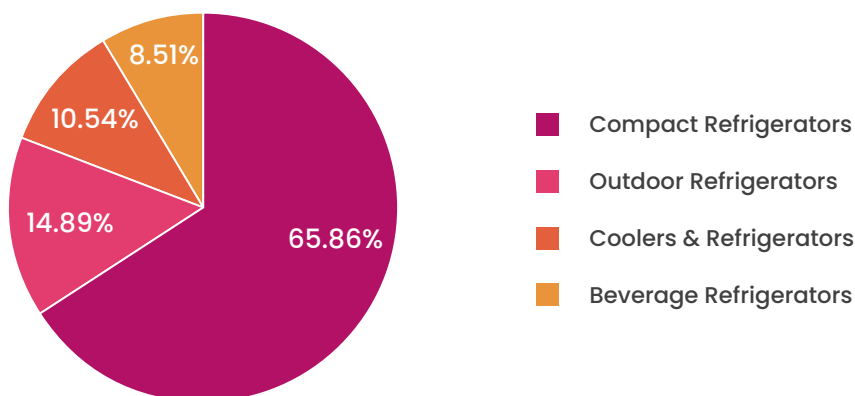
Microwave Oven Distribution: **Wayfair**



In the Microwave Oven category, Wayfair offers a variety of options to meet different customer needs. Countertop Microwave Ovens has 62% density on Wayfair, followed by 21% of Over the Range Microwaves, 7% Built-in Microwaves, 5% Drawer Microwaves and 5% All Wall Ovens.

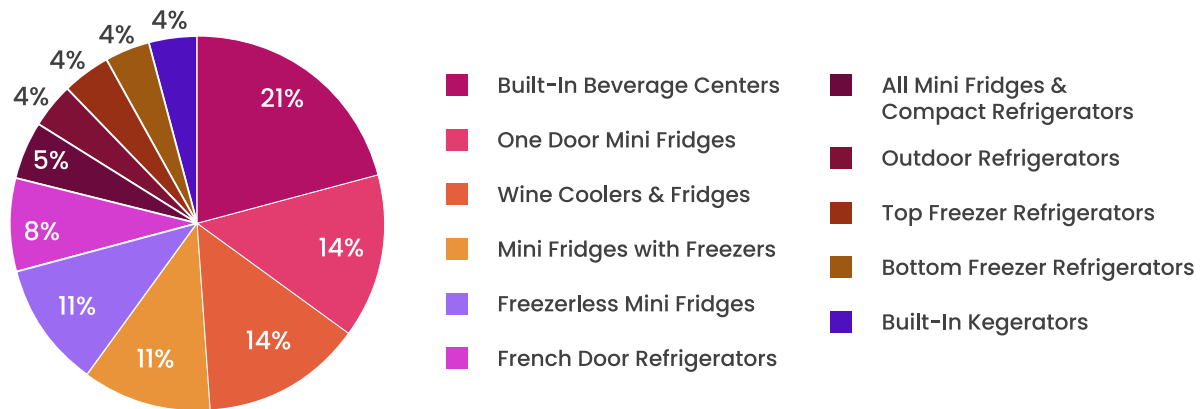
Analysis of **Refrigerator**

Refrigerator Distribution: **Amazon**



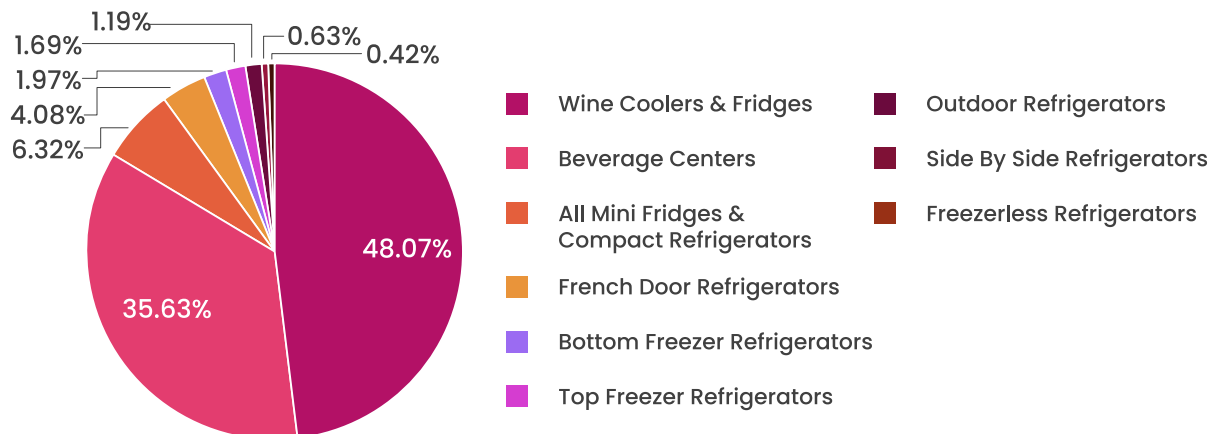
Amazon offers a wide range of refrigerators to cater to different needs and preferences. On Amazon, Compact Refrigerator has the highest majority with **66%** density, followed by Outdoor Refrigerators (**15%**), Coolers & Refrigerators (**11%**) and Beverage Refrigerators (**8%**).

Refrigerator Distribution: Walmart



On Walmart, Built-in Beverage Centers have the highest density in the Refrigerator category with **21%**, followed by One Door Mini Fridges and Wine Coolers & Fridges with **14%** each. Mini Fridges with Freezers and Freezer-less Mini Fridges have **11%** density each. Compact Refrigerators and French Door Refrigerators have **8%** and **5%** density respectively, while Outdoor Refrigerators and Top Freezer Refrigerators have **4%** density each. The remaining categories like Bottom Freezer Refrigerators and Built-in Kegerators have **4%** density respectively.

Refrigerator Distribution: Wayfair



Wine Refrigerators dominate Wayfair's Refrigerator category, accounting for 48% of all products in this category. With a density of 36%, beverage refrigerators rank in second, whereas other types of refrigerators have substantially lower densities.

Comparative Pricing Analysis of White Goods on Different Marketplaces

	Wayfair	Walmart	Amazon	Winner
Refrigerator	\$1,423.30	\$884.20	\$400.60	Amazon
Dishwasher	\$887.50	\$562.60	\$838.30	Walmart
Freezer	\$1,260.80	\$583.50	\$719.50	Walmart
Clothes Dryer	\$129.50	\$72.70	\$426.60	Walmart
Microwave Oven	\$428.70	\$583.80	\$344.30	Amazon
Air Conditioner	\$765.40	\$1,524.80	\$730.70	Amazon

Price is one of the most important factors for customers to consider when making purchasing decisions, especially with the growing popularity of eCommerce, which has made it easier for consumers to compare costs across different retailers.

To compare the pricing of white goods, we have taken the average price of each category into consideration. The retailer with the lowest average price has been declared the pricing fight winner.

Amazon has the lowest prices in the Refrigerator, Microwave Oven, and Air Conditioner categories, with prices ranging from

\$400.6, \$344.4, and \$730.7.

In comparison, Walmart has the lowest pricing in the categories of

Dishwasher (\$562.6), Freezer (\$583.5), and Clothes Dryer (\$72.7).

The data shows large pricing discrepancies between product categories and merchants. Retailers that regularly offer the lowest prices on a wide range of products may be better able to attract and keep customers.

Leading Brands in Various Marketplaces

Air Conditioner	Amazon	Frigidaire	Senville	LG Electronics	Ontel	Friedrich
	Walmart	Emerson Quiet Kool	General Electric	Friedrich	LG Electronics	Frigidaire
	Wayfair	LG Electronics	Friedrich	Keystone	MrCool	Danby
Clothes Dryer	Amazon	Euhomy	Samsung	Kenmore	Vivohome	Costway
	Walmart	Salav	Conair	Steamfast	Rowenta	Tomshoo
	Wayfair	Black Decker	Panasonic	Rowenta	Salav	Reliable Corporation
Dishwasher	Amazon	Fisher & Paykel	Spt	Farberware	Generic	Comfee
	Walmart	Sunpentown	Frigidaire	Danby	General Electric	Farberware
	Wayfair	Danby	Blomberg	Zline Kitchen and Bath	Bertazonni	Samsung
Freezer	Amazon	Midea	Wanai	Whynter	Koolatron	Frigidaire
	Walmart	Danby	Arctic King	Whynter	Koolatron	Midea
	Wayfair	Summit Appliance	Koolatron	Danby	Equator	Black Decker
Microwave Oven	Amazon	Frigidaire	General Electric	Black Decker	Comfee	Toshiba
	Walmart	General Electric	LG Electronics	Galanz	Zline Kitchen and Bath	Frigidaire
	Wayfair	General Electric	Cosmo	Panasonic	Sharp	Galanz
Refrigerator	Amazon	Frigidaire	Bull BBQ	Frigidaire	Astroai	Upstreman
	Walmart	Danby	Frigidaire	Avanti	Whynter	Summit Appliance
	Wayfair	Summit Appliance	Forno	Newair	Koolatron	U-Line

The top brands were chosen by examining each brand's average PLP ranks from July to December 2022.

We have selected the top five brands in each category across all marketplaces in the table above.

On Amazon, Frigidaire is the best-selling brand in three categories: air conditioners, microwave ovens, and refrigerators. Summit Appliance is the top brand on Wayfair in two categories - Freezer and Refrigerator, whereas Danby is the top brand on Walmart in two categories - Freezer and Refrigerator.

Several manufacturers, such as LG Electronics, routinely rank among the top five in the Air Conditioner category across all marketplaces. Similarly, General Electric is in the top five in the Microwave Oven category across all marketplaces.

It is worth noting that certain brands, such as Frigidaire, LG Electronics, and General Electric, frequently emerge as top 5 brands across multiple categories and markets.

Factors Leading to Brand Leadership

A leading brand is one that has established itself as a top player in its industry, with a strong reputation, high levels of customer loyalty and a commitment to innovation and customer satisfaction.

We studied a few factors such as average price, ratings and content benchmark index to understand why a brand is a leading brand.

Case Study 1: Frigidaire

Frigidaire is one of the top 5 brands in almost all the white goods category except Clothes Dryer.

	Air Conditioner	Clothes Dryer	Dishwasher	Freezer	Microwave Oven	Refrigerator
Price	\$449	\$1399	\$770	\$845	\$725	\$730
Ratings	3.39	3.38	3.85	3.18	4.02	3.24
CBI Score	14.3	12.37	7.74	7.89	8.87	10.21



Competitive Pricing



Ratings above 3



Positive CBI Score in all the categories

Case Study 2: General Electric

	Air Conditioner	Clothes Dryer	Dishwasher	Freezer	Microwave Oven	Refrigerator
Price	\$395	\$1098	\$727	\$918	\$433	\$1656
Ratings	4.28	3.61	3.91	4.44	4.23	3.96
CBI Score	14.42	6.7	7.65	8.45	9.69	6.89



Competitive Pricing



Average product rating of >4



Positive CBI Score in all the categories

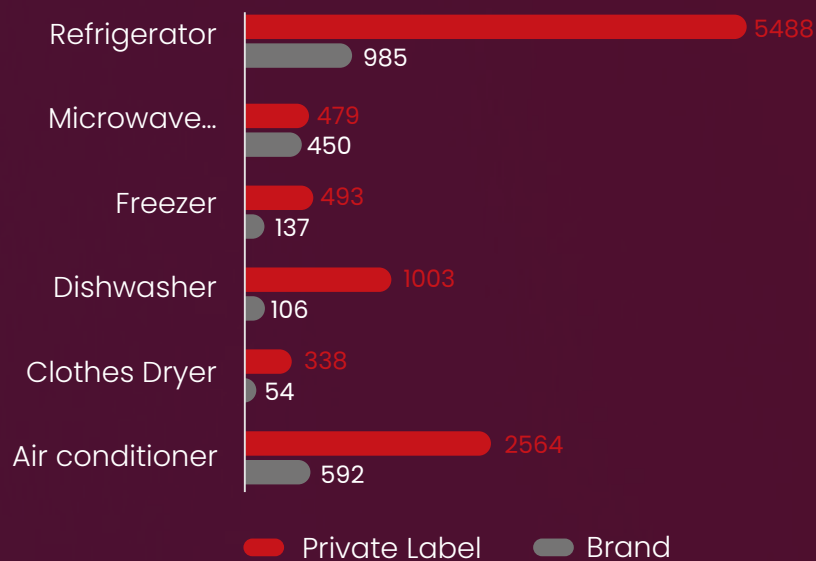
After the above factors, a brand may be considered a leading brand due to its strong reputation, innovation in products and customer loyalty to name a few.

Brand Performance Comparison with Private Labels on Assortment Size

Private label products have gained substantial appeal in recent years due to their cost-effectiveness and greater availability. Branded items, on the other hand, continue to have a substantial market presence, particularly in the white goods industry.

We studied the assortment size of prominent brands and private labels across various white goods categories on Amazon, Walmart, and Wayfair to better understand the performance of branded products against private labels.

Amazon's Brand Vs Private Label Assortment



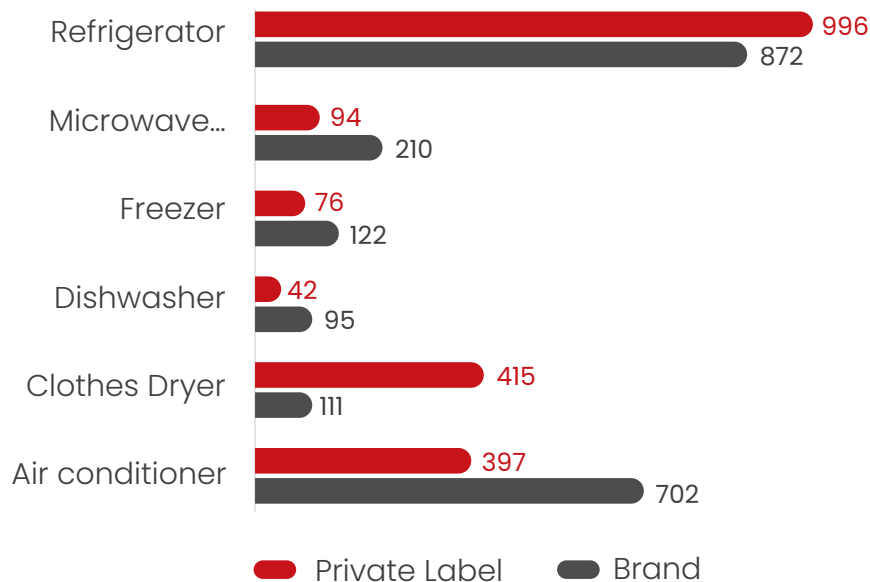
On Amazon, private label products have the highest number of products in all categories as compared to branded products. This suggests that Amazon is focusing on developing its own private label products to compete with established brands in the market.

Walmart's Brand Vs Private Label Assortment



The categories with the highest number of branded products on Walmart are Refrigerator, Microwave Oven, Freezer, Dishwasher, and Air Conditioner, while Clothes Dryer is the only category with more Private Label products.

Wayfair's Brand Vs Private Label Assortment



On Wayfair, the categories with the highest number of branded products are Microwave Oven, Freezer, Dishwasher, and Air Conditioner. Refrigerators and Clothes Dryer have more Private Label products.

It can be inferred from the data that retailers show a preference for Amazon as a platform to sell their products over other marketplaces.



Key Insights

Ecommerce sales for the Home Appliances segment in the US are seeing significant growth and are expected to cross \$ 30 billion by 2028. Ecommerce sales are driven by online marketplaces such as Amazon, Walmart and Wayfair, which have become the go-to destinations for shoppers looking for a wide range of products at competitive prices, while also providing retailers with the opportunity to expand their reach and increase their sales.

The right product assortment and pricing strategy are critical tools for online retailers to retain and grow market share. This report does a comparative study of the most popular US online marketplaces# for white goods\$. It covers assortment analysis, price comparison, product content and customer ratings & reviews.

The key findings of this report are:

The US catalog is dominated by **Refrigerator (39%)** followed by **Air Conditioner (30%), Microwave Oven (11%), Dishwasher (8%), Freezer (6%)** and **Clothes Dryer (6%)**.

Amazon and Walmart can be seen as the most competitive in terms of pricing.

Frigidaire, Danby, Summit Appliances, LG and GE are leading brands across different categories.

Private labels have the largest share in product assortment (**>95%**), with Amazon being the preferred platform.

The insights in this report are for product assortment and category leaders. They are designed to help them make better decisions regarding their product assortment, pricing and merchandising.

About us

About Iksula (www.iksula.com)

Iksula is a leading eCommerce solutions provider for brands and retailers globally, led by a team with over four decades of experience. We assist over a dozen billion-dollar companies in managing their commerce operations seamlessly. We help brands and retailers realize superior economic performance by transforming their supply chain and retail operations for digital era. This includes engineering cutting-edge tech for creating engaging experiences for your customers and automating business processes for your stakeholders.

About the Research

Research was conducted using Iksula's inhouse accelerator 'Product Intelligence'. The research includes the product and category level matching using ML and AI algorithms on data scraped from Amazon, Walmart and Wayfair. The brands data was monitored over Jul-Dec 2022 and product data is as of 30th Dec 2022.

About the Research Team

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About Product Intelligence

Stay ahead of the competition with Product Content tracking services. Our team monitors millions of SKUs worldwide to uncover valuable insights and trends. From new product introductions and top sellers to content benchmarking and pricing analysis, we have you covered.

Maximize the value of your eCommerce data with our proprietary ML dictionaries and analytics models. Our team can help you track important trends and build proprietary models to suit your specific needs. With our data sets and analytics, you can stay on top of trending categories and products, price and shipping charges, and content and taxonomy benchmarking.

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