

Vacuum Cleaners - UK - August 2010

Report Price: £1500 / \$2310 / €1793



What is this report about?

The value of the 2010 market for vacuum cleaners is estimated to be 5% lower than in 2008 when Mintel last reviewed the industry. Volume sales have fallen at a faster rate than value (10%), and average price paid per unit has risen by a modest 2%. Trading conditions for the suppliers targeting this industry have been challenging over the last two years.

This report looks at factors underpinning market decline and manufacturer efforts to mitigate it, rising consumer interest in eco products and wider variety in format and retailing developments. It also looks at demographic and economic trends and how they have shaped the market and are influencing its future.

What have we found out?

- Vacuum cleaner manufacturers face challenging conditions and have seen value sales falling y-o-y over the last five years. 2010 market value of £452 million is 5% lower than in 2008 and volume sales of almost 5.3 million units are 10% below their 2008 level. Mintel expects little recovery in the market over 2011-13 in volume terms, and even though volume sales will improve to 5.4 million units by 2015, value is forecast to continue falling to £420 million in 2015.
- Sticks and handhelds should have more potential to do well in this market thanks to an ageing population that doesn't want a heavy and bulky machine and smaller households that don't have the storage space. Currently, cylinder and upright models take the bulk of sales and other versions, such as multifunction, sticks and handhelds have just 9% of volume sales.
- Dyson is the market leader by some distance and has managed to increase share in this declining market. It commits to high levels of adspend and product development. In our Brand Elements survey, Dyson is far and away the strongest brand surveyed and leads on the majority of positive traits. In particular, it is most functional, durable and reliable.
- Ownership of vacuum cleaners is almost universal, but eight in ten adults (41m) would only buy a new model if their existing appliance breaks down.
- For seven in ten potential buyers (37m), suction power is the key feature they look for, but after this they want an appliance that is easy to move around, lightweight and easy to store.
- One way to introduce some differentiation to the UK market might be to take a less serious approach in advertising themes. In the US, humour – gently mocking “Clean Freaks” (Hoover) – is integral to a number of adverts and a greater variety of users are depicted, eg foolish husband (Electrolux).

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EMEA: +44 (0)20 7778 7151
Americas: +1 (312) 932 0600
APAC: +61 (0)2 8284 8100