



MARKET SCOPE

Mapping the Home + Housewares Opportunity

This first installment of the 2026 IHA State of the Industry – MarketScope – provides a look at the size of the U.S. retail housewares business, with data on market and primary category sizes and exclusive insights from leading industry market research analytics company Circana.

The report specifies 2025 sales for the total small domestic appliance and housewares market, measured using Circana’s “Checkout” consumer-tracking methodology. It also breaks down small appliances, including sales by kitchen, personal care and home environment electrics; and non-electric housewares, including sales by cookware/bakeware, kitchen tools and gadgets, tabletop and home organization/cleaning. A listing of specific categories tracked under each classification is also presented.

The report also indicates year-over-year percent sales gains or declines – 2025 vs. 2024 – for each of the classifications tracked. Joe Derochowski, Circana’s vice president and senior home analyst, provides insights on the metrics presented in this report. He noted that percent gain/decline data points are among the most compelling research findings for industry and retail executives across the home and housewares business landscape.

In addition, this report presents data on the share of 2025 housewares retail sales by retail channel, including a breakdown of the overall business by online and physical store sales.

The 2026 IHA State of the Industry Report will continue in June with MarketOutlook, in-depth analysis of research on consumer housewares purchase expectations; and in July with MarketWatch, exclusive data and insights covering key lifestyle factors driving housewares growth opportunities.

At-Home Trends, Replacement Demand Sustain Growth Pockets

The U.S. home industry – the small domestic appliance and housewares retail market, as tracked and analyzed by Circana for the IHA State of the Industry report – declined by .5% over the past year. However, Derochowski pointed out that there were some growth areas related to (1) consumers eating at home, (2) consumers entertaining at home, (3) high-frequency-use products hitting the replacement phase, (4) changes in weather patterns, (5) and new product innovation. While innovation was often rewarded, Circana saw a decline in the number of new items in 2025, Derochowski said.

2025 Retail Housewares Sales*

	2025 DOLLAR SALES	PERCENT CHANGE VS. 2024
TOTAL SMALL APPLIANCES/HOUSEWARES	\$77.12B	-0.5%
TOTAL SMALL APPLIANCES	\$44.94B	1.0%
Personal Care	\$10.93B	-0.6%
Home Comfort & Water Filtration	\$10.57B	+1.9%
Floorcare	\$8.40B	-1.0%
Total Kitchen Electrics	\$13.84B	+4.1%
Blending/Processing/Mixing	\$2.61B	+3.6%
Coffee/Esspresso	\$3.06B	+6.1%
Heating Appliances	\$4.94B	+1.0%
All Other Kitchen Electrics	\$3.23B	+7.7%
TOTAL HOUSEWARES	\$32.18B	-2.5%
Cookware/Bakeware	\$4.66B	+3.7%
Gadgets + Cutlery	\$7.30B	+2.4%
Tabletop	\$3.85B	-4.1%
Kitchen/Laundry Organization + Cleaning	\$4.12B	-9.5%
All Other Housewares	\$12.26B	-0.4%

Source: Circana/Checkout/12 months ending December 2025 vs. prior year*

*Scroll to bottom of report to view lists of specific product types tracked within the Small Appliances and Housewares segments.

Small Appliances

Personal care was down 1%, but growth was seen in health- and convenience-oriented categories, such as oral care, hair care and men's grooming.

Home Comfort + Water Filtration grew by 2% year over year as changes in weather patterns created a greater need for products to help people stay cool and breathe cleaner air.

Floorcare declined by 1%, with stick vacuums, hand-held specialty cleaning and workshop vacuums among the bright spots as consumers looked to replace some of these products, seek help with weather-related events and embrace innovations.

Total Kitchen Electrics grew by 4% as consumers ate and entertained more at home. Growth was led by air fryers, espresso makers, ice shavers/snow cone makers and stand mixers.

Total Housewares declined by 2% in 2025. The bright spots were related to baking, entertaining, and the replacement of high-frequency-use items.

Housewares

Cookware/Bakeware grew by 4%, with bakeware leading the category as consumers baked more at home.

Gadgets/Cutlery grew by 2% as consumers continued to focus on eating at home, including a greater emphasis on protein.

Tabletop saw a 5% decline in dollars as consumers focused on other parts of the kitchen.

Kitchen/Laundry Organization and Cleaning saw a 10% decline in 2025. However, sinkware cleaning tools saw growth.

All Other Housewares declined by 5%, but food storage and kettles saw growth as people continue to increase their consumption of leftovers, entertain more often and drink more tea.

40% In-store Purchasing

60% Online Purchasing

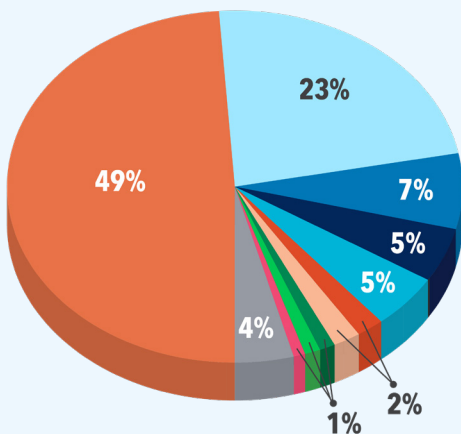
Broader Housewares Channel Mix Signals Small Appliance Growth Opportunity

The channel profiles for Total Small Appliances differ from those of Total Housewares. While the top two (E-Commerce and Mass Merchant) are the same and six of the top 10 are similar for each grouping, there is more diversification within Total Housewares, including Dollar Stores, Sporting Goods and Home Specialty.

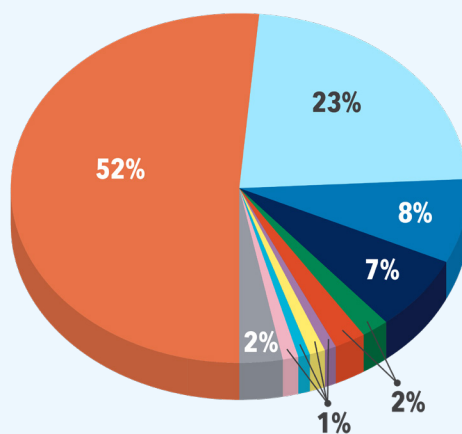
The Total Small Appliances top 10, meanwhile, includes Electronics, Drug Store and TV Shopping. At the same time, the Housewares channel share breakdown could reveal growth opportunities for Small Appliances in Off Price, Dollar Stores, Sporting Goods and Home Specialty.

2025 Retail Housewares Sales by Channel

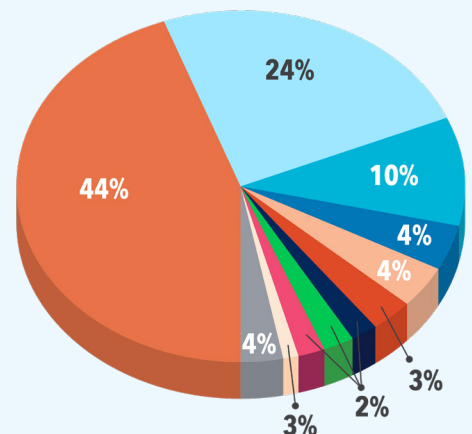
TOTAL SMALL APPLIANCES/HOUSEWARES**



TOTAL SMALL APPLIANCES**



TOTAL HOUSEWARES**



- DIRECT MAIL/ E-COMMERCE
- MASS MERCHANT
- WAREHOUSE CLUB
- HOME HARDWARE STORE
- OFF-PRICE
- DOLLAR STORE
- DEPARTMENT STORE
- ELECTRONICS STORE
- SPORTING GOODS
- SPECIALTY STORE - HOME
- SPECIALTY STORE - BEAUTY
- SPECIALTY STORE - HOME
- DRUG STORE
- TV SHOPPING
- GROCERY STORE
- ALL OTHER CHANNELS

Source: Circana/Checkout/12 months ending December 2025 vs. prior year

**Department Store includes National Chain; E-Commerce = Pureplay Retail and DTC Brands

*Product Types Tracked

PERSONAL CARE

- Curling Irons/Stylers
- Hair Removal Replacement Parts
- Garment Care
- Hairdryers
- Hairsetters
- Heating Pads
- Home Hair Clippers
- IPL
- Lighted Mirrors
- Massaging Appliances
- Men's Electric Shavers
- Men's Trimmers
- Oral Care Appliances
- Oral Care Replacement Parts
- Scales
- Women's Grooming

HOME COMFORT

- Air Purifiers
- Air Purifier Filters
- Air Purifier Pre-Filters
- Dehumidifiers
- Electric Diffusers
- Fans
- Heaters
- Humidifiers
- Room Air Conditioners
- Vaporizers
- Water Filtration Devices
- Water Filtration Replacement Filters

FLOORCARE

- Bare Floor Cleaners
- Canister Vacuums
- Deep Carpet Cleaners
- Electric Carpet Sweepers
- Handheld Specialty Cleaning
- Hand Vacuums
- Non-Electric Carpet Sweepers

- Robotic Vacuums
- Stick Vacuums
- Upright Vacuums
- Workshop Vacuums

TOTAL KITCHEN ELECTRICS

- Blending/Processing/Mixing
- Combo Hand/Stand Mixers
- Hand Blenders
- Hand Mixers
- Kitchen Systems
- Other Blending & Processing
- Single-Serve Blending & Processing
- Specialty Drink Makers
- Stand Mixers
- Stand Mixer Attachments
- Traditional Blenders
- Traditional Choppers
- Traditional Food Processors

Coffee/Espresso

- Coffee Grinders
- Coffee Percolators
- Coffeemakers
- Cold Brewers
- Espresso Makers
- Frothers
- Moka Pots
- Non-Electric Coffee Presses
- Non-Electric Pour Overs
- Single-Serve Brewing Systems

Heating Appliances

- Air Fryers
- Countertop Microwave Ovens
- Electric Griddles
- Electric Grills
- Electric Pressure Cookers
- Electric Skillets/Woks
- Food Steamers
- Fryers

- Multi-Cookers
- Other Cookers
- Other Electric Grills/Griddles
- Other Waffle/Sandwich/Treat Makers
- Rice Cookers
- Roaster Ovens
- Sandwich Makers
- Slow Cookers
- Sous Vides Toasters
- Toaster Ovens
- Waffle Irons

All Other Kitchen Electrics

- Beer & Cocktail Makers
- Bottles/Carafes
- Breadmakers
- Carbonators
- Chocolate Fountains
- Citrus Juicers
- Compact Refrigerators
- Kitchen Composters
- Electric Can Openers
- Electric Kettles
- Electric Knives
- Electric Pasta Makers
- Fondue Sets
- Food Dehydrators
- Food Vacuum Sealer Bags & Rolls
- Hot Plates
- Ice Cream/Yogurt Makers
- Ice Shavers/Snow Cone Makers
- Jar Openers
- Juice Extractors
- Meat Grinders/Mincers
- Mixes/Syrups
- Specialty Ovens
- Popcorn Makers
- Soda Machines
- Tea Makers
- Vacuum Sealers

COOKWARE/BAKEWARE

- Cookware
- Non-Metal Bakeware
- Metal Bakeware

GADGETS/CUTLERY

- Cutlery
- Cooking Gadgets
- Entertaining Gadgets
- Preparation Gadgets
- Serving Gadgets
- Specialty Gadgets

TABLETOP

- Beverageware
- Dinnerware
- Flatware
- Serveware

ALL OTHER HOUSEWARES

- Crystal Giftware
- Food Preservation
- Food Storage
- Kettles
- Portable Beverageware

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