Freedonia Industry Study #1521

World Electric Housewares & Personal Care Appliances

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World Electric Housewares & Personal Care Appliances, a new study from The Freedonia Group, provides you with an in-depth analysis of the major trends in the world market in six regions and 29 countries -- critical information to help you with strategic planning.

This brochure gives you an indication of the scope, depth and value of Freedonia's new study, *World Electric Housewares & Personal Care Appliances*. Ordering information is included on the back page of the brochure.

Brochure Table of Contents

Study Highlights

- Worldwide demand for electric housewares and personal care appliances is projected to rise 3.3 percent annually through 2005 to $34 billion.

- Market growth in China will be stronger than in an other major country. China became the world's largest supplier of electric housewares and personal care appliances during the 1990s.

- Reflecting the presence of large home-grown industries in many cases, and rising direct investment by Western multinationals seeking new growth markets, production in developing regions (including Eastern Europe) is expected to continue growing faster than output in economically advanced nations.

- Increases in global electric housewares and personal care appliances demand will be limited by a comparatively sluggish outlook for developed countries.

- The global market for electric housewares -- including both small kitchen and other small household appliances -- is forecast to climb faster than personal care appliances demand.

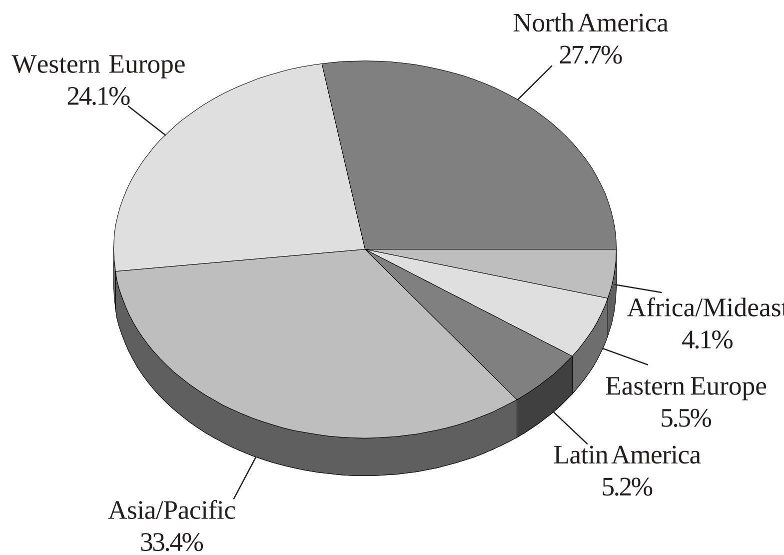
- Among the most notable trends in electric housewares and personal care appliances design is the growing use of computer and electronics technology to increase ease of operation and minimize energy use.

- The top six manufacturers -- Matsushita, Philips Electronics, Sanyo, the Braun Products unit of Gillette, SEB and Electrolux -- account for a third of all product sales worldwide.

* Excluded from the scope of the study are larger household appliances such as clothes washers and dryers, dishwashers, microwave ovens, conventional ovens and ranges, refrigerators and freezers. Also excluded are nonelectric products including hand-crank coffee grinders and safety razors, ceiling- and wall-mounted fans, central vacuum systems, clocks and sewing machines, and commercial appliances.

Study Highlights

World Electric Housewares & Personal Care Appliances Demand, 2000



World Electric Housewares & Personal Care Appliances Demand
(million US dollars)

Item	1995	2000	2005	2010	% Annual Growth 00/95	% Annual Growth 05/00
Personal Consump Expend (bil 1998 US$)	18939	22639				
$ small appliances/mil $ PCE	1345	128				
World Electric Housewares/Appl Demand	25472	29				
United States	6050	70				
Canada & Mexico	810	980				
Western Europe	6481	702				
Japan	3476	340				
China	1895	2650				
Other Asia/Pacific	2940	3700				
Latin America	1355	1510	184			4.0
Eastern Europe	1550	1590	1970	2460	0.5	4.4
Africa/Mideast	915	1180	1490	1890	5.2	4.8

Sample Table

Table of Contents

Tables and Charts are featured for each region and country. Historical data and forecasts are presented for 1995, 2000, 2005 and 2010.

For each country/region, the following are provided:

Gross Domestic Product (bil 1998 US$)
- per capita GDP

Population (million persons)
- urban % total population
- persons per household

Urban Population (million persons)

Households (million)

Personal Consumption Expend (bil 1998 US$)
- $ small appliances/mil $ PCE
- $ small appliances/mil $ GDP
- $ small appliances/capita
- $ small appliances/household

Elec Housewares/Appl Demand (mil US$)

- Electric Housewares:
  - Small Kitchen Appliances
    - Coffee & Tea Makers
    - Toasters & Toaster Ovens
    - Other
- Other Small Household Appliances
  - Vacuum Cleaners
  - Portable Fans
  - Clothes Irons
  - Other
- Personal Care Appliances:
  - Electric Shavers, Trimmers & Clippers
  - Hair Dryers & Curling Irons/Brushes
  - Other

net exports
Electric Housewares/Appliance Shipments

Market Environment

The Market Environment Section discusses key indicators that drive demand for electric housewares and personal care appliances, including demographic and social trends and Freedonia's uniquely developed macroeconomic indicators.

This information provides you with an understanding and an analysis of the climate in which the global electric housewares and personal care appliances industry operates and helps you build your market strategy to sustain long-term growth.

Technology & Product Innovation

Technological innovation has played a major role in th... ...ce industry's development throughout its history. The first ... ...ere the portable fan and clothes iron, both inve... ...n of small appliances did not begin on a large sca... ...or electricity in the early part of the twentieth centu... ...merica and Western Europe. Notable industry milestones include the introduction of the electric vacuum cleaner in 1905, the coffee percolator in 1908, the electric frying pan in 1909, the hair dryer in the early 1920s, the automatic pop-up toaster in 1926, the electric shaver in 1931, the automatic drip coffee maker in 1972 and the cordless vacuum cleaner in 1979.

SAMPLE PAGE

Innovations continue to be made in small appliance design, and products introduced in recent years are more convenient to use, offer improved performance, use less energy and are safer to operate than earlier models. Among the most notable trends in small appliance design is the growing use of computer and electronics technology to improve ease of operation. For example, in November 2001 Electrolux introduced the TRILOBITE automatic, self-propelled vacuum cleaner. The TRILOBITE utilizes ultrasound technology to navigate around a room by itself and avoid obstacles. It is designed to return to its charging base when the power is running low and can automatically resume cleaning the remaining area once recharged. Another example is Sunbeam's OSTER IN2ITIVE computerized blender and food processor, which was introduced in late 2001. The IN2ITIVE blender and food processor is preprogrammed with 40 recipes and features a proprietary hybrid blade design that can be used for food processing and dicing in forward mode, and blending in reverse.

The use of computer and electronics technology has also enabled small appliance manufacturers to improve power management and minimize energy use.

World Supply & Demand

The World Supply and Demand Section highlights the key issues that have affected the global electric housewares and personal care appliances market over the past ten years and summarizes contributing growth factors.

This information helps you:

- **Focus your sales and marketing efforts on high growth areas.**
- **Propose new areas for development**

WORLD SUPPLY & DEMAND

Electric Housewares - Clothes Irons

SAMPLE PAGE

Glob... forecast to climb at a 3.8 percent annual pace to $... rate of increase for the other small household a... s will be stimulated by rising employment and pers... d nations, where washing methods used (for example, hand wringing of clothing) can leave garments more in need of ironing. The introduction of irons with advanced features and improved product styling will also help boost demand in industrialized countries. Examples include Applica's BLACK & DECKER steam generator iron, which is engineered to produce two to three times more steam than traditional irons to remove wrinkles in one pass, and Hamilton Beach Proctor-Silex's translucent CLEARSTEAM iron, which is available in blueberry, tangerine, lime and strawberry colors.

Increases through 2005 will be restrained by the maturity of the iron market in most areas, as well as by the greater life expectancy of newer irons, limiting

World Electric Housewares & Personal Care Appliances
Demand by Type
(million U.S. dollars)

Item	1990	1995	2000	2005	2010
Personal Consump Expend (bil 1998 US$)	16694				
$ small appliances/mil $ PCE	1330				
Electric Housewares/Appliances Demand	22203				
Electric Housewares:	18009				
Small Kitchen Appliances	7273				
Coffee & Tea Makers	1525				
Toasters & Toaster Ovens	706				
Other	5042				
Other Small Household Appliances	10736				
Vacuum Cleaners	5852				
Portable Fans	2306	2782			
Clothes Irons	1630				
Other	948				
Personal Care Appliances:	4194				
Electric Shavers, Trimmers & Clippers	1683				
Hair Dryers & Curling Irons/Brushes	1545				
Other	966				

SAMPLE TABLE

Supply & Demand by Country & Region

These Sections analyze demand trends and consider the threats and opportunities in 29 countries and six regions.

Italy: Supply & Demand

Italy is the third largest produ... ...ces in Western Europe behind Germany and France, w... ...ion. In 2000, the country had a sizable trade sur... ...industry output — a notable change from 19... ...deficit. Italy derives much of its position in the global s... ...y from its relatively low (by regional standards) labor and production costs, and strategic location providing access to much of Europe (including the burgeoning Eastern and Central portions), the Mideast, Africa and parts of Asia through its port cities. Although Italian-made small appliances are sold throughout the world, the most important export markets include the nation's EU partners, the US and Middle Eastern nations such ...market include

...he fourth ...UK. With ...ppliances grew ...om a generally ...ersonal ...or types of ...er coffee

...to rise 1.7 ...nand but a ...l be driven by ...nufacturers ...Shipment gains ...nestically and ...cers. Industry

SAMPLE PAGE

Russia - Electric Housewares & Personal Care Appliances
Supply & Demand
(million U.S. dollars)

Item	1990	1995	2000	2005	2010
Personal Consump Expend (bil 1998 US$)	336				
$ small appliances/mil $ PCE	2649				
Electric Housewares/Appliances Demand	890				
Electric Housewares:	713				
Small Kitchen Appliances	234				
Coffee & Tea Makers	61	51			70
Toasters & Toaster Ovens	23				
Other	150				
Other Small Household Appliances	479				
Vacuum Cleaners	218				
Portable Fans	134				
Clothes Irons	85				
Other	42	34			45
Personal Care Appliances:	177				
Electric Shavers, Trimmers & Clippers	79				
Hair Dryers & Curling Irons/Brushes	49				
Other	49				
net exports	60				
Electric Housewares/Appliances Shpts	950				

SAMPLE TABLE

Industry Structure

Gain a better global understanding of your competition and analyze your company's position in the industry with information about:

- **industry composition**
- **market share**
- **product development**
- **manufacturing**
- **marketing & distribution**
- **cooperative agreements**
- **financial requirements**
- **mergers & acquisitions**
- **industry restructuring**

Marketing & Distribution

As with any industry, effective marketing is a key factor for success in the world small appliance business. The principal marketing-related competitive variables for the industry are price, product q... performance, and company reputation. Because brand ... ctor in customer purchase selections and users ten... ger small appliance manufacturers follow a ... Under this marketing approach, manufacturers em... and brand name reputation to distinguish their goods, using advertising and product design to build and maintain a particular brand image. Advertising and promotion spending averages four-to-five percent of sales for leading small appliance companies.

SAMPLE PAGE

Other small appliance firms have adopted a focus strategy, under which all resources are dedicated to a specific product or end-use segment. Because all resources are dedicated to one area, these companies are usually quick to market with updated models and are often perceived to provide higher quality goods and better service than a supplier involved in numerous product categories. One example is Kirby (a unit of Berkshire Hathaway), whose only small appliance products are high-end vacuum cleaners and related items that are marketed solely through in-home demonstrations. A focus strategy, however, can be dangerous, as company revenues rely solely upon performance of a particular product category or end market.

As with many industries, the Internet is taking an increasingly important role in small appliance marketing. Major manufacturers have websites providing extensive product information. These sites allow users to see the full range of products available from the company, without the floor space limitations of a physical store. Some corporate sites also allow consumers to buy small appliances

Company Profiles

The Profiles Section analyzes 44 companies active in the world electric housewares and personal care appliances industry. These profiles represent a sampling or cross-section of the types of companies involved in the industry.

Divisions, subsidiaries, joint ventures, etc., are discussed under appropriate parent companies.

Sources for profiles included:

- **Information provided by key staff members in the respective companies**
- **Annual reports**
- **10-K reports**
- **Security analysts reports**
- **Corporate product literature**

COMPANY PROFILES

Matsushita Electric Industrial Company Limited
1006, Oaza Kadoma
Kadoma-shi, Osaka 571
Japan
816-6908-1121
http://www.mei.co.jp

Matsushita Electric Corporation of America
One Panasonic Way
Secaucus, NJ 07094
201-348-7000
http://www.panasonic.com

Sales: $6
Geograph
Employmen

SAMPLE PAGE

Key Products: floor care, small kitchen, personal care and garment care appliances
Selected Tradenames: PANASONIC and NATIONAL

Matsushita Electric Industrial produces and markets electric and electronic products for consumer, business and industrial applications. The Company operated in three segments in FY 2001: Consumer Products, Industrial Products and Components. In April 2001, Matsushita Electric Industrial reorganized its operations into four segments: AVC Networks, Home Appliances, Industrial Equipment, and Components and Devices.

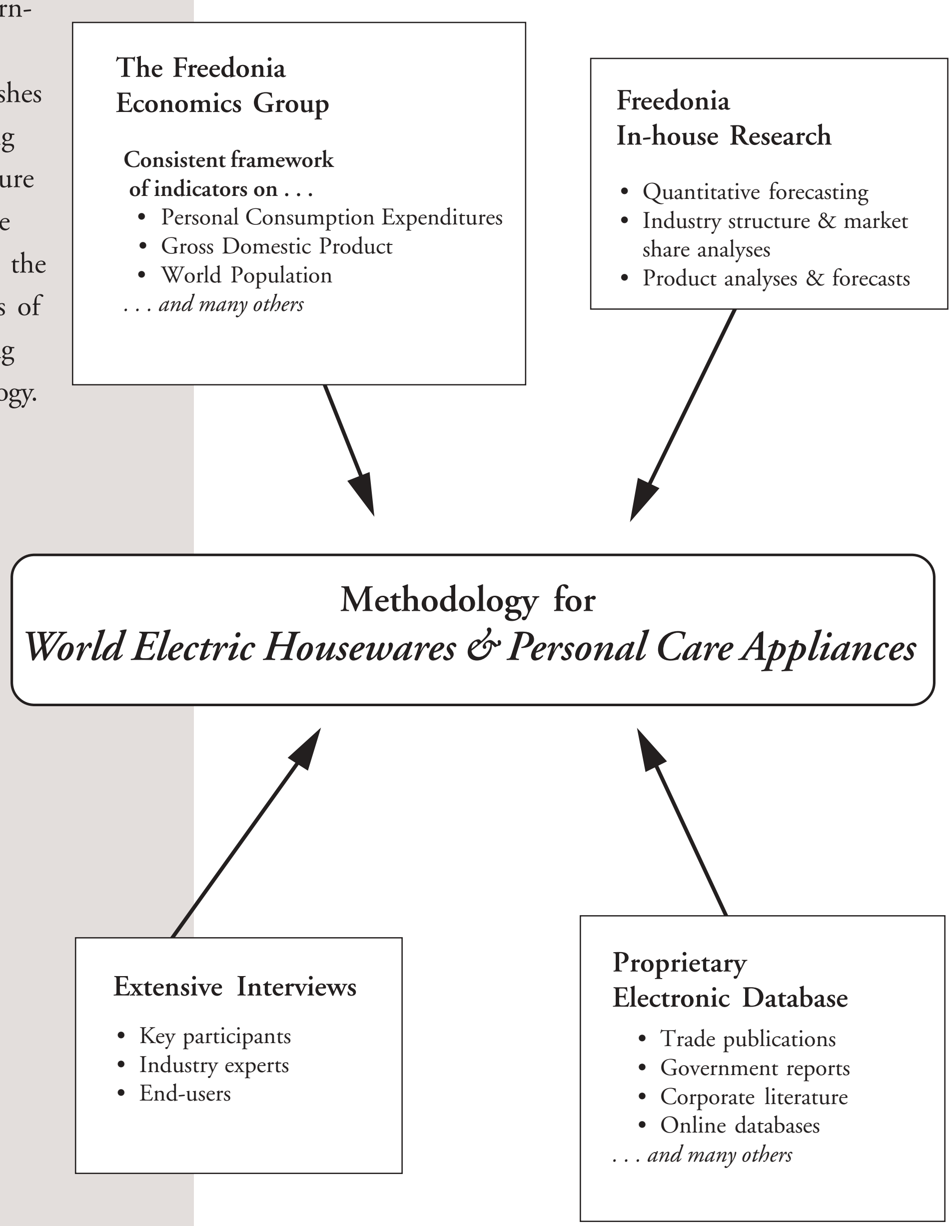
Matsushita was the number one producer of small appliances worldwide in 2000, with an 11.7-percent share of total sales. The Company is active in the small appliance industry through the manufacture of small kitchen, personal care and

Companies Profiled

Alba plc
   Pulse Home Products
Applica Incorporated
   Windmere-Durable Holdings
Bajaj Electricals Limited
Berkshire Hathaway Incorporated
   Kirby Company
Bissell Incorporated
Black & Decker Corporation
Bunn-O-Matic Corporation
Candy Elettrodomestici SpA
Conair Corporation
   Cuisinart
   Interplak
   Waring
De'Longhi SpA
   Kenwood Appliances
Electrodomesticos Solac SA
Electrolux AB
   Eureka
Electromures SA
Fresh Company
Gillette Company
   Braun
Glen Dimplex Group
   AKO-ISMET Elektrogerate
   Goblin Ireland
   Morphy Richards
Haier Group Company
Helen of Troy Limited
   Tactica International
Holmes Group Incorporated
   Rival Company
Illinois Tool Works Incorporated
   West Bend
Koc Holding AS
   Arcelik
LG Group
Matsushita Electric Industrial Company Limited
Maytag Corporation
   Hoover Company
Mondragon Corporacion Cooperativa
   Fagor Electrodomesticos
Moulinex-Brandt Group
   Krups
NACCO Industries Incorporated
   Hamilton Beach Proctor-Silex
National Presto Industries Incorporated
Philips Electronics NV
   Norelco Consumer Products
   Optiva Corporation
Polar Industries Limited
   Sheffield Appliances
Remington Products Company LLC
Royal Appliance Manufacturing Company
Salton Incorporated
   Pifco Holdings
   Sonex International
Samsung Group
Sanyo Electric Company Limited
   BPL Sanyo Utilities and Appliances
SEB SA
   Krups
Shop-Vac Corporation
Sunbeam Corporation
Superior Electrics Limited
TechTronic Industries Company Limited
   Gimelli Laboratories
   Vax
Vorwerk & Company
   Kobold Systems
   Thermomix
Wahl Clipper Corporation
Whirlpool Corporation
   KitchenAid USA
Zelmer Sp zoo

Forecasting Methodology

Freedonia does not just collect and reprint data; Freedonia develops data. Our analysts thoroughly investigate an industry by extensively interviewing key industry participants and analyzing information from sources such as associations, government and trade literature. Once this research is complete, Freedonia establishes one set of forecasts. All writing, editing and forecasting is done in-house to assure quality and consistency. In cases where data does not exist, Freedonia develops the data based on input/output ratios, bills of materials and flow charts. The following chart summarizes Freedonia's methodology.



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The Freedonia Group, Inc. is a leading international industry study/ database company.

Since 1985, Freedonia has published 1,800 titles covering areas such as plastics, chemicals, coatings and adhesives, building materials, industrial components and equipment, health care, packaging, household goods, security, and many other industries.

Freedonia has produced a wide variety of titles, including:

- ***World Major Household Appliances***
- ***World Commercial Refrigeration Equipment***
- ***World Batteries***
- ***World Power Tools***

Because Freedonia is a reliable information source, our forecasts are cited in numerous publications such as *The Wall Street Journal, Appliance, Appliance Manufacturer* and *HFN.*

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Because all of our staff work at the same location, interaction between analysts and departments provides a strong system of checks and balances.

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Because all of our forecasts consider the environment in which a product or industry is operating, as well as threats and opportunities to the market, Freedonia forecasts are reliable indicators of future performance.

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Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the electric housewares and personal care appliances industry include: Electrolux, Gillette, Illinois Tool Works, Matsushita Electric and Philips Electronics.

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World Major Household Appliances

The world major appliance market will reach 337 million units in 2005. Developing countries will lead gains based on ongoing industrialization and rising personal incomes. Microwave ovens will grow the fastest, followed by dishwashers, refrigerators and freezers. The diffusion of "smart appliances" will spur demand in developed countries. This study analyzes the world major appliance industry to 2005 and 2010 by product, region, and for 27 countries. It also details market share and profiles key companies.
#1508. . . . . 1/02. . . . . $4,800

Lamps

US demand for lamps will grow 3.9% annually through 2005, driven primarily by sales of higher-priced energy-efficient fluorescent and high intensity discharge (HID) lamps. Demand will also benefit from the large installed base of lamps in residential and nonresidential buildings. This study analyzes the $3.8 billion US lamp industry to 2005 and 2010 by type and market. It also reviews competitive lighting methods such as LEDs and fiber optics, presents market share data and profiles leading companies.
#1479. . . . . 10/01. . . . . $3,600

Power & Hand Tools

US demand for power and hand tools will grow over 4% annually through 2005, driven by power tool upgrades and the continuing diffusion of cordless products. Electric drills and saws will lead gains among power tools, while multitools, automotive tools and ergonomic designs pace the hand tool segment. Professional users will remain dominant. This study analyzes the $12.3 billion US power and hand tools industry to 2005 and 2010 by type and market. It also details market share and profiles key firms.
#1478. . . . . 10/01. . . . . $3,800

Batteries

Primary and secondary battery demand in the US will grow 6.6% through 2005. Gains will be fueled by continuing technological innovation, increases in demand for battery-powered devices and a shift in the product mix toward more expensive batteries that offer superior performance. Primary lithium, zinc-air and alkaline batteries will offer the best prospects. This study analyzes the $10.4 billion US batteries industry to 2005 and 2010 by product and market. It also evaluates market share and profiles key firms.
#1447. . . . . 7/01. . . . . $3,800

World Power Tools

World demand for power tools will grow 5.8% per year through 2005. Gains will result from rising construction spending in developing nations and the popularity of large home center stores and "do-it-yourself" home repairs in developed countries. Electric tools will remain dominant and grow the fastest, especially electric saws. This study analyzes the US$18.5 billion world power tool industry to 2005 and 2010 by product, region and for 22 countries. It also details market share and profiles leading firms.
#1419. . . . . 5/01. . . . . $4,500

World Commercial Refrigeration Equipment

World demand for commercial refrigeration equipment will grow over 6% annually, driven by rising demand in developing countries. Japan will lead gains among developed countries. Reach-in and walk-in coolers and freezers, vending machines, display cases and ice machines will be the fastest growing products. This study analyzes the US$18.6 billion commercial refrigeration equipment industry to 2004 and 2009 in six world regions and 22 countries. It also evaluates market share and profiles key firms.
#1367. . . . . 1/01. . . . . $4,500

World Batteries

Primary and secondary battery demand will grow 8% per year worldwide, driven by new portable electronic devices. The best prospects will remain in less advanced, faster-growing markets. Lithium ion- and lithium polymer-based rechargeables and "superpre-mium" alkaline batteries will lead gains. This study analyzes the US $41 billion world battery industry to 2004 and 2009 by type, region and for 24 countries. It also details market share and profiles key firms.
#1347. . . . . 12/00. . . . . $4,600

Commercial Refrigeration Equipment

US demand for commercial refrigeration equipment will advance nearly 5% annually. Gains will be driven by the growing number of food stores and restaurants-including fast food outlets in venues such as gas stations-which will boost demand for display cases, walk-in coolers, freezers, beverage refrigeration and ice machines. This study analyzes the $7.1 billion US commercial refrigeration equipment industry to 2004 and 2009 by product and by market. It also evaluates market share and profiles key firms.
#1337. . . . . 10/00. . . . . $3,500

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