World Major Household Appliances

World Industry Study with Forecasts to 2009 & 2014

Study #2015 | January 2006 | $5500 | 431 pages
Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT
General ........................................... 4
World Economic Outlook ..................... 5
Personal Income/Expenditure Trends ........ 10
Residential Building
  Construction Expenditures .................. 15
  World Demographic Outlook ................ 17
  Urbanization Patterns ....................... 18
  Household Formation Patterns ............. 20
Household Appliance Price Patterns ........ 22
Legal & Regulatory Issues .................... 23
Technology & Product Innovation .......... 24
Performance .................................. 25
Energy Efficiency/Space Reduction ......... 27
Aesthetic Appeal/Noise Reduction .......... 28

SUPPLY & DEMAND
General .......................................... 30
World Major Household Appliances
  Demand Dynamics ............................ 31
  Appliance Ownership Rates ................. 31
  Regional Sales Trends ...................... 33
  Products .................................. 35
  Cooking Appliances ....................... 36
  Refrigerators & Freezers ................... 38
  Clothes Washers & Dryers ................. 39
  Dishwashers ................................ 40
World Major Household Appliances
  Supply Dynamics ............................ 41
  International Trade Flows ................. 44

NORTH AMERICA
General .......................................... 46
  United States ............................... 53
  Canada .................................... 62
  Mexico .................................... 70

WESTERN EUROPE
General .......................................... 79
  Germany .................................... 87
  United Kingdom ............................. 96

ASIA/PACIFIC
General .......................................... 144
  China ...................................... 153
  Japan ....................................... 160
  Other Asia/Pacific .......................... 169
  Australia ................................... 171
  India ....................................... 177
  Indonesia ................................... 184
  South Korea ................................ 192
  Taiwan ...................................... 199
  Thailand .................................... 206
  All Other Asia/Pacific ........................ 213

OTHER REGIONS
General .......................................... 221
  Latin America ................................ 224
  Argentina ................................. 232
  Brazil ...................................... 239
  Other Latin America ........................ 246
  Eastern Europe .............................. 253
  Czech Republic ............................. 262
  Poland ..................................... 269
  Russia ..................................... 276
  Ukraine .................................... 284
  Other Eastern Europe ...................... 290
  Africa/Mideast ............................... 297
  South Africa ................................ 305
  Turkey ...................................... 312
  Other Africa/Mideast ....................... 319

INDUSTRY STRUCTURE
General .......................................... 327
  Industry Composition ....................... 328
  Market Share ................................ 331
  Whirlpool .................................. 331
  Electrolux .................................. 332
  Matsushita .................................. 332
  Haier ......................................... 332
  BSH .......................................... 333
  General Electric ................................ 333
  Other ........................................ 333
  Mergers, Acquisitions & Industry Restructuring ................................ 334
  Product Development & Manufacturing ................................ 337
  Marketing & Distribution .................... 339
  Cooperative Agreements .................... 341
  Financial Requirements ..................... 351

COMPANY PROFILES
  Amica Wronki SA ............................ 354
  BPL Limited ................................ 355
  BSH Bosch und Siemens Hausgeraete GmbH .................. 357
  Candy SpA .................................. 360
  Daewoo Electronics .......................... 362
  De’Longhi SpA ................................ 364
  Electrolux AB ................................ 366
  Fisher & Paykel Appliances .................. 370
  General Electric Company ................... 373
  Gorenje gospodinski aparati .................. 376
  Haier Group ................................ 379
  Indesit Company ............................. 383
  Jiangsu Little Swan Group .................... 387
  Koc Holding AS .............................. 389
  Konka Group Company ....................... 391
  LG Electronics .............................. 392
  Liebherr-International ....................... 394
  Matsushita Electric Industrial ............... 396
  Maytag Corporation .......................... 399
  Merloni (Antonio) SpA ....................... 401
  Miele & Cie KG ............................... 403
  Mitsubishi Electric ......................... 405
  Mondragon Corporacion ...................... 407
  Samsung Electronics ......................... 410
  SANYO Electric .............................. 412
  Sharp Corporation ........................... 415
  Sub-Zero Freezer Company ................... 417
  Tatung Company ............................. 419
  Toshiba Corporation ........................ 420
  Videocon International ....................... 423
  Viking Range Corporation .................... 424
  Whirlpool Corporation ....................... 426
  Wood (WC) Company .......................... 431

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List of Tables & Charts

EXECUTIVE SUMMARY
1 Summary Table ........................................ 3

MARKET ENVIRONMENT
1 Gross Domestic Product by Region .................. 10
2 Per Capita GDP by Region .......................... 12
3 Residential Building Construction Expenditures by Region .................. 16
4 World Population by Region .......................... 18
5 Urban Population by Region .......................... 20
6 Number of Households by Region .................. 21

SUPPLY & DEMAND
1 Major Household Appliances Demand by Region .............. 34
2 Major Household Appliances Demand by Product .................. 36
3 Cooking Appliances Demand by Region .................. 37
4 Refrigerators & Freezers Demand by Region .................. 39
5 Clothes Washers & Dryers Demand by Region .................. 40
6 Dishwashers Demand by Region .................. 41
7 Major Household Appliances Shipments by Region .............. 43
8 World Major Household Appliances Net Exports by Region .................. 45

NORTH AMERICA
1 North America Major Household Appliances Supply & Demand .................. 49
2 North America Cooking Appliances Supply & Demand .............. 50
3 North America Refrigerators & Freezers Supply & Demand .............. 51
4 North America Clothes Washers & Dryers Supply & Demand .............. 52
5 North America Dishwashers Supply & Demand .................. 53
6-10 United States ............................. 53-62
11-15 Canada ............................ 62-70
16-20 Mexico ............................ 70-78

WESTERN EUROPE
1 Western Europe Major Household Appliances Supply & Demand .............. 82
2 Western Europe Cooking Appliances Supply & Demand .............. 84
3 Western Europe Refrigerators & Freezers Supply & Demand .............. 85
4 Western Europe Clothes Washers & Dryers Supply & Demand .............. 86
5 Western Europe Dishwashers Supply & Demand .............. 87
6-10 Germany ............................. 87-95
11-15 United Kingdom ............................. 96-104
16-20 France ............................. 104-112
21-25 Italy ............................. 112-120
26-30 Spain ............................. 120-128
31-35 Netherlands ............................. 128-136
36-40 Other Western Europe ............................. 136-143

ASIA/PACIFIC
1 Asia/Pacific Major Household Appliances Supply & Demand .............. 148
2 Asia/Pacific Cooking Appliances Supply & Demand .............. 149
3 Asia/Pacific Refrigerators & Freezers Supply & Demand .............. 150
4 Asia/Pacific Clothes Washers & Dryers Supply & Demand .............. 151
5 Asia/Pacific Dishwashers

Ober Regions
1 Other Regions Major Household Appliances Supply & Demand .............. 224
2 Other Regions Latin America ............................. 224-232
3 Other Regions Argentina ............................. 232-239
4 Other Regions Brazil ............................. 239-246
5-11 Other Latin America ............................. 246-253
6 Other Regions Eastern Europe ............................. 253-262
7-11 Other Eastern Europe ............................. 262-269
8 Other Regions Asia ............................. 269-276
9 Other Regions Russia ............................. 276-284
10 Other Regions Ukraine ............................. 284-290
11 Other Regions Other Europe ............................. 290-297
12 Other Regions Africa/Mideast ............................. 297-305
13 Other Regions South Africa ............................. 305-312
14-20 Other Africa/Mideast ............................. 312-319
21-25 Other Africa/Mideast ............................. 319-326

INDUSTRY STRUCTURE
1 Selected Major Household Appliance Manufacturers Revenue Data, 2004 ............................. 329
2 Selected Acquisitions & Divestitures ............................. 336
3 Selected Cooperative Agreements ............................. 344
Microwave ovens will post the best gains of any product group through 2009 due to significant untapped market potential in numerous countries, especially in developing regions.

Global white goods demand to grow 3.7% annually through 2009

World demand for major household appliances (white goods) is projected to increase 3.7 percent annually through 2009, exceeding 390 million units. Demand in the Asia/Pacific region, in particular China, will continue to benefit from above-average urban population growth and healthy gains in the number of households. Above-average growth will occur in the Africa/Mideast region due to solid gains in the number of households and rising per capita incomes. Eastern Europe will also post strong gains, reflecting rising standards of living in the region.

Product innovations to boost replacement demand in developed countries

Growth is also expected in the developed nations, despite the relatively high rates of market penetration. Advances in these regions will primarily be supported by replacement demand, as users both replace broken equipment and trade up to newer models. Since the life cycle of most white goods is over ten years, manufacturers will continue to introduce new technological innovations as a way to encourage upgrades.

Among innovations that will boost demand are intelligent appliances that can perform such functions as reading labels and connecting with other household goods. The ongoing integration of electronics into white goods is expected to benefit firms that are well known in the electronics market. For example, LG and Samsung, electronics firms that are already significant players in the US microwave oven segment, are expected to take an increased share of the US washing machine and refrigerator markets.

China now world’s largest supplier of white goods

China has grown into the world’s largest supplier of white goods, more than tripling production from 1994 to 2004. The nation has taken advantage not only of its inexpensive labor pool, but also of favorable exchange rates, which have made pricing of Chinese goods especially competitive. China has become a leading producer in the refrigerator, washing machine and microwave oven segments, where products are exported to the US, Western Europe and throughout Asia. Although overall appliance production is expected to increasingly shift toward Asia, Western Europe and the US will remain major producers due to their technical proficiency.

Microwave ovens to post the best gains

Microwave ovens will post the best gains of any product group through 2009 due to significant untapped market potential in numerous countries, especially in the developing regions. Dishwashers will exhibit above-average growth as well, although price, size and cultural considerations will prevent these items from becoming commonplace in most areas where they are not already established. Refrigerators, freezers and conventional ranges will experience gains, benefitting from rising personal income levels in developing nations.
high personal incomes and levels of personal consumption expenditures. As a result, the country has a high ownership rate and utilizes all types of appliance products, which has limited demand growth to primarily replacement demand.

Shipments of white goods from facilities in France totaled 7.9 million units in 2004, leaving the country with a trade deficit equivalent to over 30 percent of domestic demand. Imports comprise an even larger portion of French demand, with key external suppliers including EU partners Italy, Germany, Spain, Sweden and the UK, along with the US and the major Asian producing countries. The French white goods manufacturing industry is an important exporter in its own right, finding markets of significance throughout the EU area, other West European countries (e.g., Switzerland) and Eastern Europe.

The market for appliances in France is projected to advance 2.7 percent per year to 13.5 million units in 2009, outpacing sales gains from 1999 to 2004 and growth in the region as a whole. Gains will reflect the accelerating growth in the number of households, which will provide opportunities for high penetration items such as refrigerators and freezers. Personal income levels will also advance, resulting in a modest gain in personal income from 2004 to 2009.

As a continuation of industry production patterns during the 1999-2004 period, white goods shipments from plants in France are expected to decline through 2009 to 7.2 million units. Competition from Asian producers, most notably in China, will limit gains. The microwave oven and refrigerators segments will be the hardest hit, with production dropping precipitously through 2014. Foreign-based multinationals in France include BSH of Germany, Indesit of Italy, Daewoo Electronics of South Korea, and Whirlpool of the US.
### TABLE VI-25

**INDIA CLOTHES WASHERS & DRYERS SUPPLY & DEMAND**

(million dollars)

<table>
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<tr>
<td>Households (million)</td>
<td></td>
<td></td>
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<tr>
<td>washers/000 households</td>
<td>167.6</td>
<td>184.3</td>
<td>205.7</td>
<td>233.2</td>
<td>258.3</td>
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<tr>
<td>dryers/000 households</td>
<td>4.1</td>
<td>5.3</td>
<td>6.5</td>
<td>7.6</td>
<td>9.2</td>
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<tr>
<td>Clothes Washers &amp; Dryers Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Washers</td>
<td>710</td>
<td>1030</td>
<td>1420</td>
<td>1880</td>
<td>2520</td>
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<tr>
<td>Dryers</td>
<td>30</td>
<td>50</td>
<td>80</td>
<td>110</td>
<td>150</td>
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<tr>
<td>net exports</td>
<td>-110</td>
<td>-30</td>
<td>170</td>
<td>230</td>
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<td>Clothes Washers &amp; Dryers Shipments</td>
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<tr>
<td>Washers</td>
<td>600</td>
<td>1000</td>
<td>1590</td>
<td>2110</td>
<td>2860</td>
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<tr>
<td>Dryers</td>
<td>—</td>
<td>—</td>
<td>70</td>
<td>110</td>
<td>160</td>
</tr>
</tbody>
</table>

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**COMPANY PROFILES**

**Amica Wronki SA**  
ul. Mickiewicza 52  
Wronki 64-510 POLAND  
48-67-254-6100  
http://www.amica.com.pl


**Key Products:**  
- Free-standing and built-in microwave ovens, cookers, conventional ovens and hobs, washing machines, refrigerators, freezers and dishwashers.

Amica Wronki is a producer of electric cooking appliances and other appliances. The Company is active in the world appliance industry through the production of free-standing and built-in microwave ovens, cookers, conventional ovens and hobs, washing machines, refrigerators, freezers and dishwashers. The Company is a leading manufacturer of household appliances in Poland. In 2004, cookers accounted for sales of $149 million, refrigerators for $80 million and washing machines for $50 million. Amica Wronki produces and markets appliances under such brand names as AMICA, GRAM and HANSA. A newer product from the Company is the AMICA AMM 21E80GS microwave oven, which incorporates a MULTI WAVES system that ensures foods are evenly heated. This appliance also features COMBIGRILL technology, which allows food to be prepared using both a grill and a microwave oven. Baked potatoes, poultry, casseroles, rice and other foods can be prepared using this technology. Additionally, COMBIGRILL ensures that foods are crispy.

“Shipments of major household appliances from India reached 4.9 million units in 2004, making India the fifth largest producer in the region. The Indian white goods industry has grown over the past several years as a result of healthy domestic demand. However, there remains a significant trade deficit equivalent to ...”

--Section IV, pg. 68
INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION-MAKERS

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OTHER STUDIES

Household Appliances in China
The Chinese household appliance market will grow 4.5% annually through 2010 and become the world’s largest. Gains will be driven by low penetration rates, healthy household formation and replacement demand. Cooking appliances will remain dominant and grow the fastest, followed by dish sterilizers and dishwashers. This study analyzes China’s 111 million unit major household appliance industry to 2010 and 2015 by product, market and region. It also evaluates market share and profiles major players.
#2102 .......... 09/2006 ............... $4900

Consumer Water Purification & Air Cleaning Systems
US consumer water and air treatment system demand will grow 4.7% yearly through 2010. Gains will be driven by home air and water quality concerns, quieter and more user-friendly systems, and better filter replacement compliance. Conventional types will remain dominant while higher value systems lead gains. This study analyzes the $1.3 billion US consumer water purification and air cleaning system industry to 2010 and 2015 by product, market and region. It also details market share and profiles major players.
#2088 .......... 09/2006 ............... $4400

Home Organization Products
US sales of home organization products will grow 5.1% annually through 2009. Advances are based in part on the rising number of homes with less storage space in unfinished areas, but with larger closets and three-car garages. Modular units will lead gains, and the dominant metal and wire segment will outpace other materials. This study analyzes the $5.9 billion US home organization product industry to 2009 and 2014 by material, product, room and market. It also evaluates market share and profiles major producers.
#1967 .......... 09/2005 ............... $4100

World Power Tools
World power tool demand will rise 5% annually through 2005. Best prospects exist in Latin America, Africa/Mideast and the Asia/Pacific region based on growing populations and rising construction activity. Cordless electric tools will grow the fastest and, along with plug-in electrics, will remain the largest segment. This study analyzes the $22.8 billion world power tool industry to 2009 and 2014 by product, market, world region and for 23 countries. It also evaluates market share and profiles major players.
#1938 .......... 06/2005 ............... $5100

Janitorial Equipment & Supplies
The US market for janitorial equipment and supplies will reach $6.4 billion in 2009, supported by a growing number of business establishments and increasing nonresidential floorspace, as well as by ongoing interest in indoor air quality and building maintenance standards. Wipes and backpack vacuums will see the fastest gains. This study analyzes the US janitorial equipment and supply industry to 2009 and 2014 by type, market and US region. It also evaluates company market share and profiles leading players.
#1929 .......... 05/2005 ............... $4100

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