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World Major Household Appliances

Industry Study with Forecasts for **2011 & 2016**

Study #2279 | January 2008 | \$5800 | 434 pages



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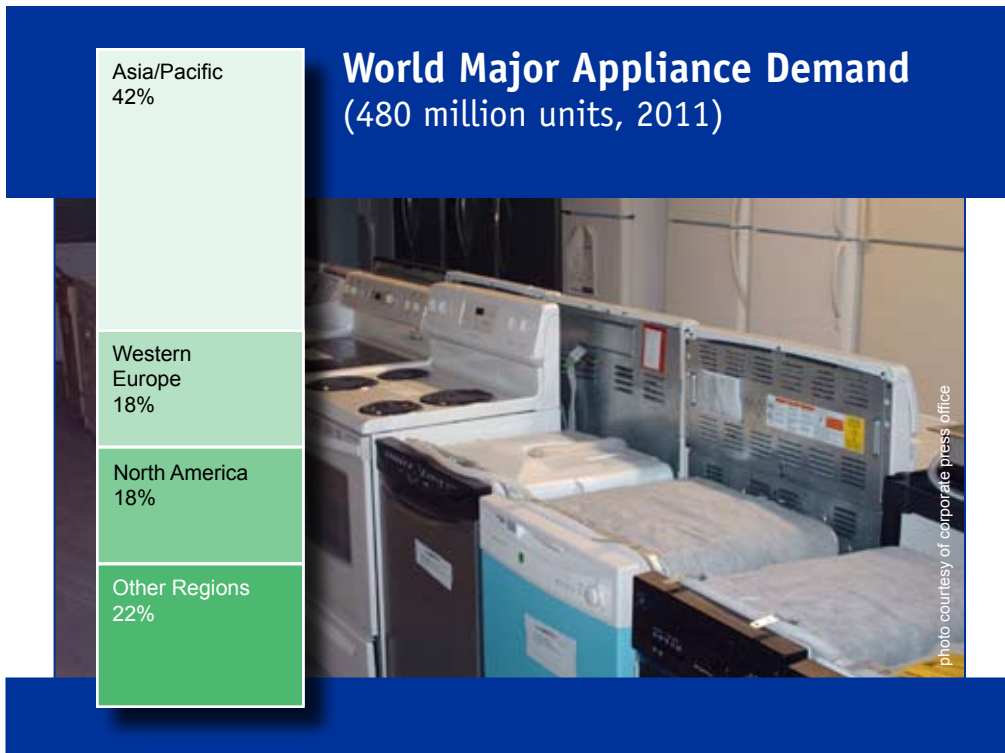
Demand in China will continue to benefit from growing urban population and household formation, but the Indian market will lead gains based on low penetration rates and rising living standards.

Global demand to rise 3.1% annually through 2011

World demand for major household appliances (white goods) is projected to increase 3.1 percent annually through 2011, exceeding 480 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. India will have the fastest growth of any nation, benefitting from low penetration rates and rising standards of living. Above-average growth will occur in the Africa/Mideast and Latin America regions due to strong gains in the number of households and rising per capita incomes. Eastern Europe will also present opportunities, as a growing middle class increases its usage of appliances such as microwave ovens and clothes dryers.

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 more efficient appliances designed to offer cost-reducing and "green" alternatives to older models.



Microwave ovens to be fastest growing product

Microwave ovens will post the fastest gains of any product group through 2011 due to their shorter lifespan compared to other white goods. In addition, significant untapped market potential exists in numerous countries, especially in the developing regions. Dishwashers will match industry growth, 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 below-average gains, but will benefit from rising income levels in developing nations.

Exports from China to slow from recent torrid pace

China is the world's largest major household appliance market, and is also the world's largest producer and exporter of these products. However, growth in exports will slow from the torrid pace of the 1996-2006 period, in part due to increasing competition in offshore markets from other low-cost producing nations as well as to the establishment of offshore facilities by some Chinese manufacturers such as Haier. Nevertheless, shipments of appliances from Chinese manufacturers will exceed 230 million units in 2011, with the majority being exported.

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Sample Text, Table & Chart

ASIA/PACIFIC

1990s on the strength of surging personal incomes and export-led growth. The strong macroeconomic environment also facilitated much structure expansion and housing construction activity, further opportunities for white goods.

Shipments of major household appliances from facilities in Thailand totaled 6.5 million units in 2006. The nation is the fourth largest white goods manufacturing industry in the Asia region behind China, South Korea and Japan. Production is export-led, with a trade surplus of over one-third of total output. The industry grew during the 1990s, benefitting from extensive investment, primarily on the part of Japanese and Korean multinationals seeking to establish beachheads for exporting throughout the region. BSH, LG Electronics, Matsushita Industrial, Mitsubishi Electric, Samsung, Sharp and Toshiba have major interests in the country. The country's major export markets are the US, Japan, other Asian nations and Western Europe.

The market for white goods is projected to grow annually through 2011 to 2016, following the 2001-2006 period and export-led growth. It will be driven by additional income and as overall economic output rises. However, these trends will be tempered by uncertainties caused by political turbulence that overthrew the Thai government in 2006.

Shipments of appliances are projected to rise 4.4 percent per year through 2011. Continued expansion of domestic demand will create opportunities. In addition, gains will benefit from export opportunities, especially in the region.

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SAMPLE TEXT

TABLE VI-42

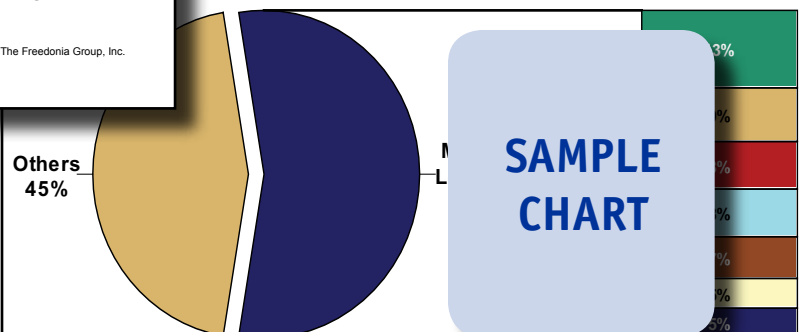
THAILAND -- MAJOR HOUSEHOLD APPLIANCE SUPPLY & DEMAND (thousand units)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil 2005\$)					245
\$ GDP/capita					30
Population (million persons)					61
urban % of total population					68
persons per household					4
Urban Population (million persons)					4
Households (million units/000 households)					4
Major Appliance Demand by Type					0
Cooking Appliances					0
Refrigerators & Freezers					0
Clothes Washers & Dryers					0
Dishwashers					0
net exports					0
Major Appliance Shipments	4070	5250	6470	8010	9610

SAMPLE TABLE

CHART VIII-1

WORLD MAJOR HOUSEHOLD APPLIANCE MARKET SHARE BY COMPANY, 2006 (\$120 billion)

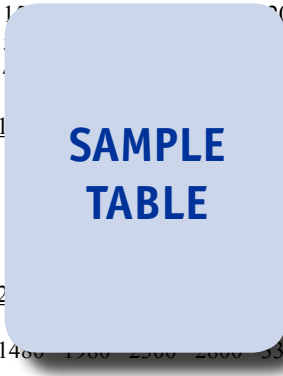


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-43
THAILAND -- COOKING APPLIANCE SUPPLY & DEMAND
 (thousand units)

Item	1996	2001	2006	2011	2016
Households (million)	10.4	10.4	10.4	10.4	10.4
ranges & ovens/000 households	1.1	1.1	1.1	1.1	1.1
microwaves/000 households	1.7	1.7	1.7	1.7	1.7
Cooking Appliance Demand	1.2	1.2	1.2	1.2	1.2
Ranges & Conventional Ovens	0.0	0.0	0.0	0.0	0.0
Microwave Ovens	0.2	0.2	0.2	0.2	0.2
net exports	0.3	0.3	0.3	0.3	0.3
Cooking Appliance Shipments	2.5	2.5	2.5	2.5	2.5
Ranges & Conventional Ovens	0.5	0.5	0.5	0.5	0.5
Microwave Ovens	1480	1700	2300	2600	3300



COMPANY PROFILES

Liebherr-International AG
 Rue de l'Industrie 45
 1630 Bulle
 Switzerland
 41-26-913-3111
<http://www.liebherr.ch>

Sales: \$
 Geograp
 Eastern I
 and Mid
 Employr

Key Pro
 ers, freez

ern Europe 59%,
 Australia 12%, Near
 ny)
 refrigerator/freez-

SAMPLE PROFILE

Liebherr-International is a privately owned holding company with subsidiaries that produce construction machinery, household appliances, machine tools, aircraft equipment and other products. The Company operates in eight product groups: Excavators, Rope Excavators, Crawlers, Loaders and Mining Trucks; Mobile Cranes; Construction Cranes and Mixing Technology; Ship, Offshore, Container and Mobile Dock Cranes; Refrigerators and Freezers; Machine Tools and Materials Flow Technology; Aerospace and Transport Technology; and Other Products and Services.

The Company is active in the world appliance industry through the Refrigerators and Freezers group, which generated sales of \$930 million in 2006. Products manufactured by the group include free-standing and built-in refrigerators, freezers, combination refrigerator/freezers, freezer chests and wine storage units. Many of Liebherr-International's appliances feature the Company's BIOFRESH technology, which promotes freshness in foods for an extended period of time. This

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"The market for household cooking appliances in Thailand will rise 4.5 percent per year through 2011 to 2.6 million units. Advances have benefitted from the shift by some consumers from lower-end item such as a cooking pot or rice cooker (the latter is not covered in this study) to cooktops. Microwave ovens hold strong potential, as the household penetration rate is still low. Shipments of household cooking appliances from Thai facilities will rise ..."

--Section VI, pg. 209

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OTHER STUDIES

World Power Lawn & Garden Equipment

World power lawn and garden equipment demand will grow 3.2% yearly through 2011. North America and Western Europe will stay the top markets while developing Asian countries grow the fastest. Lawn-mowers will remain the largest segment while turf and grounds equipment lead gains. This study analyzes the \$16 billion world power lawn and garden equipment industry, with forecasts for 2011 and 2016 by product, world region and for 22 nations. It also evaluates market share and profiles major players.

#2246 10/2007 \$5500

Outdoor Furniture & Grills

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as "cocooning" and "outdoor rooms". Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the \$6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2221 09/2007 \$4400

World Power Tools

Global demand for power tools will grow 4.1% annually through 2011. The developing countries of Asia, especially China, will see the fastest growth based on rising incomes and advances in residential and nonresidential building construction activity. Cordless electric tools will continue to lead gains. This study analyzes the \$23.4 billion global power tool industry, with forecasts for 2011 and 2016 by product, market, world region and for 25 countries. It also evaluates company market share and profiles major producers.

#2212 08/2007 \$5400

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will reach \$10.5 billion in 2011. Gains will be driven by consumer-driven product innovations and up-grades, and by the rising number of golf courses and professional landscapers. Lawnmowers will remain the largest product segment while turf and grounds equipment will grow the fastest. This study analyzes the US power lawn and garden equipment industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2174 03/2007 \$4400

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 for 2010 and 2015 by product, market and region. It also evaluates market share and profiles major players.

#2102 09/2006 \$4900

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