INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

World Major Household Appliances

Industry Study with Forecasts for **2013 & 2018**

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

World Major Household Appliances

Industry Study with Forecasts for ***2013 & 2018***

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WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Major Household Appliances

Industry Study with Forecasts for ***2013 & 2018***

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Major appliance demand will be driven primarily by market penetration in developing countries, and by steady replacement demand and new home building In developed regions.

Global demand to rise 2.8% yearly through 2013

World demand for major household appliances (white goods) is forecast to rise 2.8 percent annually through 2013, approaching 500 million units. Demand will be driven primarily by market penetration in developing countries. In developed regions, sales will depend primarily on steady replacement demand, new home building and the development of new features that prompt upgrading.

Microwave ovens to be fastest growing product

Microwave ovens are expected to exhibit the best gains due to their short replacement cycle and their significant untapped market potential in numerous countries, especially in developing regions. Refrigerators and freezers will experience solid increases, benefiting from rising industrialization and personal income levels in developing nations. Dishwashers and clothes washers will exhibit respectable 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.

Key Chinese market to slow significantly

Growth in China, the world's largest market, will slow significantly due to rising rates of ownership. However, the country will still provide 30 percent of new appliance demand through 2013 due to continued growth in residential construction. China is also the world's largest supplier of white goods, nearly tripling production from 1998 to 2008. 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 is a leading producer in the refrigerator, washing machine and microwave oven segments, exporting such products 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.

The bedrock US market is expected to show recovery from recent declines, benefiting from improved macroeconomic factors. Housing starts are expected to recover by 2013, boosting demand as a matter of course. In addition, consumer confidence is expected to rebound, encouraging consumers to trade up to newer and improved equipment. Gains are expected to be more modest in other developed nations. Aside from a high degree of market maturity (and even saturation in some product segments), replacement demand in most industrialized countries has been respectable in recent years. As a result, there is relatively less potential for incremental gains from this source going forward.

World Major Household Appliances Demand, 2013
(497.3 million units)

World Major Household Appliances

Industry Study with Forecasts for *2013 & 2018*

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Sample Text, Table & Chart

TABLE VI-16

INDIA: MAJOR HOUSEHOLD APPLIANCE SUPPLY & DEMAND (thousand units)

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ GDP/capita					[illegible]
Population (million persons)					[illegible]
urban % of total population					[illegible]
persons/household					[illegible]
Urban Population (million persons)	[illegible]				[illegible]
Households (million)					[illegible]
units/000 households					[illegible]
Major Appliance Demand					[illegible]
Cooking Appliances					[illegible]
Refrigerators & Freezers					[illegible]
Clothes Washers & Dryers					[illegible]
Dishwashers					[illegible]
net exports					[illegible]
Major Appliance Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

ASIA/PACIFIC

India is the third largest white goods market in the regio 2008 product demand of 12.6 million units. Growth in white mand in the nation exceeded regional and global averages fro 2008, averaging over five percent annually. Strong increases alization have boosted sales, as standards of living have risen overall intensity of product use remains extremely low, espec capita terms. Most households remain too poor to afford eve appliances as refrigerators and washing machines. Moreover home to several large cities (e.g., New Delhi, Mumbai), over of the population continued to live in rural areas in 2008, a fu on potential development of white goods markets in the coun

Shipments of major household appliances from India re million units in 2008, making India the second largest produ region. The Indian white goods industry has grown over the years as a result of healthy domestic demand. In addition, by country had become a net exporter of white goods. Markets include the country's regional neighbors. However, the natio ports product from areas such as Japan, China, South Korea a Europe.

Major household appliance demand in India is expected to advance 2 million units in 2013, the fastest growth rate Gains will be driven by ongoing stimulate gains in personal incon orms implemented in the country ansion, are attracting significant rring urbanization.

usehold appliances from facilitie a 4 percent annual pace through 201

SAMPLE TEXT

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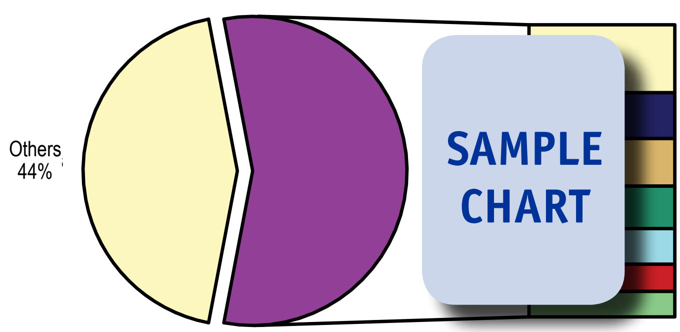
CHART VIII-1

WORLD MAJOR HOUSEHOLD APPLIANCE MARKET SHARE BY COMPANY, 2008 ($130 billion)



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Sample Profile, Table & Forecast

TABLE VI-17

INDIA: COOKING APPLIANCE SUPPLY & DEMAND
(thousand units)

Item	1998	2003	2008	2013	2018
Households (million)	[illegible]	[illegible]	[illegible]	[illegible]	79.1
ranges & ovens/000 households	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
microwaves/000 households	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cooking Appliance Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ranges & Conventional Ovens	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Microwave Ovens	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cooking Appliance Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ranges & Conventional Ovens	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Microwave Ovens	[illegible]	[illegible]	[illegible]	[illegible]	500

SAMPLE TABLE

COMPANY PROFILES

Indesit Company SpA
Viale Aristide Merloni 47
60044 Fabriano
Italy
39-732-6611
http://www.indesitcompany.com

Revenues: [illegible]
Geographic [illegible] stern Europe
59%, Easter [illegible]
Employmen [illegible]

Key Produc [illegible] bs, refrigerators,
freezers, wa [illegible]

SAMPLE PROFILE

Indesit [illegible] ances. It operates through four segments: Cooking, Cooling, Laundry and Services.

The Company participates in the world appliance industry through the Cooking, Cooling and Laundry segments. Through these segments, Indesit manufactures and sells conventional and microwave ovens, hobs, refrigerators, freezers, washing machines, dryers and dishwashers under the INDESIT, HOTPOINT, ARISTON and SCHOLTES brand names. The Cooking segment, which generated revenues of $1 billion in 2008, includes such cooking appliances as conventional and microwave ovens, and hobs. In 2008, the Cooling segment had revenues of $1.4 billion. The segment encompasses refrigerators and freezers. The Laundry segment, which had 2008 revenues of $1.9 billion, includes washing machines, dryers and dishwashers.

Product Lines -- The INDESIT product line, which generated revenues of $2.1 billion in 2008, includes refrigerators, freezers,

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"The market for household cooking appliances in India is projected to rise 5.1 percent per year through 2013 to 7.1 million units. Advances will result from the continued strong gains in personal income levels and urbanization trends. In addition, low ownership rates of both ranges and conventional ovens and microwave ovens will provide opportunities for market penetration."

--Section VI, pg. 168-9

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Other Studies

Outdoor Furniture & Grills

US outdoor furniture and grill demand will increase 3.9% annually through 2013. Both the grill and furniture segments will match the industry's overall pace, with grill sales supported by demand for more expensive, highly featured grills and furniture sales bolstered by solid gains in metal furniture and cushions and covers. This study analyzes the $6 billion US outdoor furniture and grill industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates company market share and profiles industry players.

#2554 .... 12/2009..................... $4700

World Power Lawn & Garden Equipment

Global demand for power lawn and garden equipment will expand 2.8% annually through 2013. The bedrock US market will provide the best opportunities based in part on improved products such as cordless electric models. North America and Western Europe will remain the dominant markets. This study analyzes the $16.1 billion world power lawn and garden equipment industry, with forecasts for 2013 and 2018 by product, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2542 .... 08/2009..................... $5800

World Power Tools

Global demand for power tools is forecast to rise 3.7% per year through 2013. The US market will provide the best opportunities, reflecting a turnaround in the current housing crisis, continued enthusiasm for do-it-yourself projects and the introduction of improved products, especially cordless electric models. This study analyzes the world power tool industry, with forecasts for 2013 and 2018 by product, market, world region and for 25 countries. It also evaluates market share and profiles industry players.

#2514 .... 06/2009..................... $5700

Power Lawn & Garden Equipment

US power lawn and garden equipment demand will reach $9.7 billion in 2013. Lawnmowers will remain the largest segment and be among the fastest growing, along with turf and grounds equipment. The South will stay the largest regional market while the West is expected to post the strongest advances. This study analyzes the US power lawn and garden equipment industry, with forecasts for 2013 and 2018 by material, market, product, power source and region. It also evaluates market share and profiles industry players.

#2478 .... 04/2009..................... $4600

Power & Hand Tools

US power and hand tool demand will grow 3.3% annually through 2012. Gains will be driven by continued consumer interest in DIY and home remodeling activities, the ongoing introduction of new products and a recovery in the professional construction market. Power tools will continue to outpace hand tools, especially cordless electric types. This study analyzes the $12.3 billion US power and hand tool industry, with forecasts for 2012 and 2017 by product and market. It also evaluates market share and profiles industry players.

#2432 .... 12/2008..................... $4700

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