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World Major Household Appliances

Industry Study with Forecasts for **2015 & 2020**

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INDUSTRY STRUCTURE

Gains will be driven by a recovery in housing starts in developed areas, and by a rebound in consumer confidence that will encourage trade-ups to newer and improved equipment.

World demand to rise 3.4% annually through 2015

World demand for major household appliances (white goods) is forecast to rise 3.4 percent annually through 2015 to 395 million units. The bedrock US market will show strong recovery from recent declines, benefiting from improved macroeconomic factors. Housing starts are expected to recover in developed areas such as the US and Western Europe by 2015, 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.

World Major Household Appliance Demand, 2010
(334.2 million units)

India to be fastest growing market

India will be the world's fastest growing market, fueled by rising standards of living, which will spur first-time appliance ownership. Gains in developing areas such as the Africa/Mideast region will also be stimulated by rising standards of living. Advances in Western Europe will benefit from strong increases in the number of new housing units, but will lag the overall global average due to the relative maturity of most appliance types.

Although growth in China will be strong in the immediate future, advances through 2015 will lag the global average, reflecting a cooldown from the torrid pace of increase from 2005 to 2010. Gains will be constrained by the large stock of white goods that has been sold in recent years. Ownership rates in some categories have grown tremendously, limiting the potential for new ownership. In addition, the Chinese government's stimulus incentives for the purchase of white goods will expire in 2012. This program will continue to boost ownership in rural areas through that year, dampening potential gains in 2015.

"Smart" appliances to emphasize technology in developed world markets

Technology will continue to be a key factor in the industry. For example, "smart" appliances are expected to become a significant factor in developed world markets. These appliances offer advanced features and will enable firms to sell at higher price points. For example, Samsung and LG Electronics, two firms widely known for their consumer electronics, are introducing high-tech appliances that could benefit from these companies' strong reputations in electronics. If US and European consumers view white goods less as "nuts and bolts" equipment and more as electronic equipment, they will become increasingly accepting of LG and Samsung white goods. At the other end of the spectrum, manufacturers will produce low cost no-frill appliance designs in order to attract first-time buyers in developing nations.

Sample Text, Table & Chart

TABLE VI-18

INDIA: CLOTHES WASHER & DRYER SUPPLY & DEMAND
(thousand units)

Item	2000	2005	2010	2015	2020
Households (million)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
washers/000 households	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
dryers/000 households	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Clothes Washer & Dryer Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Washers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dryers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Clothes Washer & Dryer Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Washers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dryers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

ASIA/PACIFIC

Despite growth, household penetration of appliances is
small, a function of the high degree of poverty characterizing
ments of the population. Moreover, although India is home t
large cities (e.g., New Delhi, Mumbai), 70 percent of the pop
tinued to live in rural areas in 2010, a further drag on potenti
ment of appliance markets in the country. Spotty electricity
and fairly low standards of living in many areas work to restr
Despite these factors, white goods demand in India is suppor
sheer size of the country as well as by ongoing efforts to dev
infrastructure.

Some manufacturers have developed products designed for the unique cultural characteristics of the country. For example, LG's refrigerator products available in India offer a larger vegetable compartment than its typical models. This is because of the high rate of vegetarianism in India. The company's freezer compartments are also smaller than its normal products, since many Indian consumers only use freezers for making ice.

Shipments of white goods from facilities located in India reached 14.8 million units in 2010. Gains have exceeded the regional average over the past decade, due to both rising domestic demand and export
opportunities. Because it ... has a trade
surplus. India imports fro... Eur...
ducing nations.

Demand for white g... .2 ...
per year through 2015 to ... A...
regional forecast average pa...
able macroeconomic fundamentals, including further strong
personal consumption expenditures. Market advances will b
ongoing industrialization efforts, helping to fuel building co

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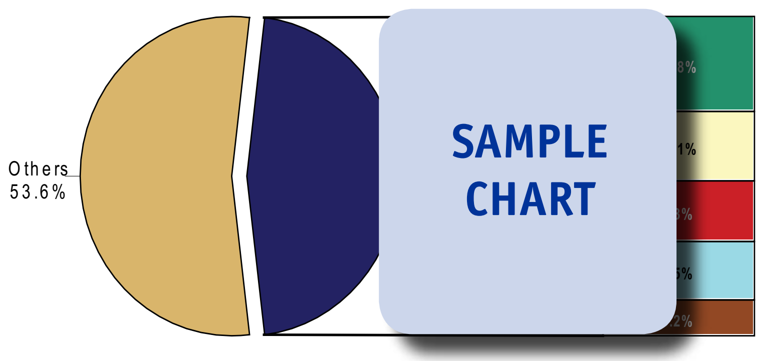
SAMPLE TEXT

CHART VIII-1

WORLD MAJOR HOUSEHOLD APPLIANCE MARKET SHARE BY COMPANY, 2010
($120 billion)



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Sample Profile, Table & Forecast

TABLE XX-00

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

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009$)					
$ GDP/capita					
Population (million persons)					
urban % of total population					
persons per household					
Urban Population (million persons)					
Households (million)					
units/000 households					
Major Appliance Demand					
Refrigerators & Freezers					
Clothes Washers & Dryers					
Cooking Appliances					
Dishwashers					
net exports					
Major Appliance Shipments	6975	10930	14780	18800	22950

SAMPLE TABLE

COMPANY PROFILES

Amica Wronki SA
ul. Mickiewicza 52
Wronki 64-510
Poland
48-67-2
http://w

Sales: $
Employ

Key Pro... conventio
refrigera... ng washi
chines; an

SAMPLE PROFILE

Amica Wronki is a producer of free-standing and built-in major appliances, and small appliances. In addition to selling products in Poland, the Company exports appliances to over 40 countries worldwide.

The Company participates in the world appliance industry through the production and supply of free-standing and built-in cookers, free-standing washing machines; conventional ovens, refrigerators, freezers, dishwashers; and hobs. Amica Wronki manufactures and markets appliances under such brand names as AMICA, GRAM and HANSA. In October 2010, it introduced AMICA INTEGRA built-in ovens, which are made from stainless steel and feature retractable, illuminated knobs.

Amica Wronki conducts production activities in Poznan, Poland. In March 2010, the Company sold a washing machine production site and a refrigerator plant in Wronki, Poland to Samsung Electronics Manufacturing Poland Sp zoo, a subsidiary of Samsung Electronics Company Limited (South Korea), for $76 million. The divestiture was part of the Company's ongoing strategy to focus on the production of

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"The market for household laundry equipment in India is projected to increase 3.5 percent per year through 2015 to 2.8 million units, below the forecast average pace for white goods demand as a whole. Gains will result from initial market penetration activity in the washing machine area, as ownership rates are quite low (below that of refrigerators) and households whose incomes are rising will desire the devices for their labor-saving potential. Clothes dryer demand will foster better gains, ..."
--Section VI, pg. 164

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Other Studies

World Power Lawn & Garden Equipment

World power lawn and garden equipment demand will rise 4.8 percent yearly through 2015. North America and Western Europe will remain dominant markets, with the US alone claiming over 60 percent of new demand. Lawnmowers will remain the top segment, while turf and grounds equipment leads gains. This study analyzes the $14.9 billion world power lawn and garden equipment industry, with forecasts for 2015 and 2020 by product, market, world region and for 22 countries. The study also evaluates company market share and profiles industry players.

#2797 .... August 2011 .... $6100

World Power Tools

World power tool demand is projected to rise 4.4 percent annually through 2015. The pace of growth will be the fastest in developing Asian countries, although the US will also provide solid growth opportunities with an expected turnaround in the current housing crisis. Electric tools will remain dominant, with cordless product posting the best gains. This study analyzes the $22 billion world power tool industry, with forecasts for 2015 and 2020 by product, market, world region and for 25 countries. The study also evaluates company market share and profiles industry players.

#2763 ....June 2011 .... $6100

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will increase 5.7 percent yearly through 2015. Turf and grounds equipment and garden tractors and rotary tillers will be the fastest growing segments, while lawnmowers will remain dominant. The fastest regional gains will be posted in the South and Midwest. This study analyzes the $7.9 billion US power lawn and garden equipment industry, with forecasts for 2015 and 2020 by product, market, material and US region. The study also evaluates company market share and profiles 34 industry players.

#2756 ....April 2011 .... $4900

Power & Hand Tools

US demand for power and hand tools will rise 4.1 percent yearly through 2014. Gains will be driven by a rebound in housing starts and ongoing consumer interest in DIY and home remodeling activities. Power tools will continue to outpace hand tools, while professional demand will grow more rapidly than consumer demand. This study analyzes the $9 billion US power and hand tool industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2695 .... November 2010 .... $4900

World HVAC Equipment

Global demand for HVAC equipment will rise 6.2 percent yearly through 2014. China will be the fastest growing market and comprise about 40 percent of new growth. Despite a modest outlook initially, US demand will rise 8.1 percent yearly. Cooling equipment will continue to outpace heating equipment worldwide. This study analyzes the $68.9 billion world HVAC equipment industry, with forecasts for 2014 and 2019 by product, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2637 .... May 2010.................... $5900

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