World Major Household Appliances, a new study from The Freedonia Group, provides you with an in-depth analysis of the major trends in the world market for household appliances and the outlook for product segments by country -- 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 Major Household Appliances. Ordering information is included on the back page of the brochure.

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World demand for major household appliances (white goods) is projected to increase 3.6 percent annually through 2005, reaching 337 million units.

Particularly favorable prospects will be found in the Asia/Pacific region, where ongoing industrialization and rising personal incomes will provide opportunities for suppliers.

Gains are expected to be modest within the developed nations, despite improving macroeconomic conditions in Japan.

Microwave ovens are expected to exhibit the best gains through 2005 due to significant untapped market potential in numerous countries, especially in the developing regions.

Technology is expected to become increasingly important in the industry, due to the diffusion of “smart appliances.” These products include such capabilities as remote Internet monitoring, and provide added convenience for consumers.

The top five major household appliance producers -- Whirlpool, Electrolux, Matsushita, General Electric and BSH -- accounted for 40 percent of global market share in 2000.

* Excluded from the scope of the study are such products as vacuum cleaners, air conditioners and other items generally referred to as “brown goods”, as well as commercial appliances and smaller household appliances in general.
# Study Highlights

**World Major Household Appliances Demand**  
(million units)

<table>
<thead>
<tr>
<th>Item</th>
<th>1995</th>
<th>2000</th>
<th>2005</th>
<th>2010</th>
<th>00/95</th>
<th>05/00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households (million)</td>
<td>1409.6</td>
<td>1537.3</td>
<td>1658.0</td>
<td>1778.0</td>
<td>1.7</td>
<td>1.5</td>
</tr>
<tr>
<td>units/000 households</td>
<td>164</td>
<td>183</td>
<td>203</td>
<td>223</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>World</td>
<td>231.4</td>
<td>282.0</td>
<td></td>
<td></td>
<td>4.0</td>
<td>3.6</td>
</tr>
<tr>
<td>North America:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td>50.8</td>
<td>65.5</td>
<td></td>
<td></td>
<td>5.2</td>
<td>2.1</td>
</tr>
<tr>
<td>Canada &amp; Mexico</td>
<td>7.8</td>
<td>11.1</td>
<td></td>
<td></td>
<td>7.3</td>
<td>3.2</td>
</tr>
<tr>
<td>Western Europe</td>
<td>62.5</td>
<td>68.6</td>
<td></td>
<td></td>
<td>1.9</td>
<td>1.7</td>
</tr>
<tr>
<td>Asia/Pacific:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>6.9</td>
<td>12.1</td>
<td></td>
<td></td>
<td>4.3</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>4.8</td>
<td>11.6</td>
<td></td>
<td></td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Other Asia/Pacific</td>
<td>12.5</td>
<td>22.6</td>
<td></td>
<td></td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Other Regions:</td>
<td>33.6</td>
<td>19.8</td>
<td></td>
<td></td>
<td>3.9</td>
<td>3.9</td>
</tr>
<tr>
<td>Latin America</td>
<td>4.5</td>
<td>18.5</td>
<td></td>
<td></td>
<td>4.8</td>
<td>3.9</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>7.8</td>
<td>18.9</td>
<td></td>
<td></td>
<td>4.8</td>
<td>3.9</td>
</tr>
<tr>
<td>Africa/Mideast</td>
<td>14.5</td>
<td>18.4</td>
<td></td>
<td></td>
<td>4.8</td>
<td>3.9</td>
</tr>
</tbody>
</table>

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**World Major Household Appliances Demand, 2000**

- Western Europe: 26.3%
- North America: 33.7%
- Africa/Mideast: 4.0%
- Eastern Europe: 4.4%
- Latin America: 6.2%

**Sample Table**
Tables and Charts are featured for each region and country. Historical data and forecasts are presented for 1990, 1995, 2000, 2005 and 2010.

For each country/region, the following are given:

- Gross Domestic Product
  - $GDP/capita
- Population
  - urban % of total population
  - persons per household
- Urban Population
  - units/000 urban person
- Households
  - units/000 households
- Major Appliances Demand by Type
  - Refrigerators & Freezers
  - Clothes Washers & Dryers
  - Washers
  - Dryers
  - Cooking Appliances
    - Ranges & Conventional Ovens
    - Microwave Ovens
    - Dishwashers
    - net exports
    - Major Appliances Shipments
      - Refrigerator & Freezer Shipments
      - Clothes Washers & Dryers Shipments
      - Washers
      - Dryers
      - Cooking Appliances Shipments
        - Ranges & Conventional Ovens
        - Microwave Ovens
        - Dishwasher Shipments

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The Market Environment Section discusses key indicators that drive demand for 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 appliance industry operates and helps you build your market strategy to sustain long-term growth.

Technology & Product Innovation

Basic white goods design and manufacturing technology are well established and well understood, and the industry has generally not been considered technology-intensive compared to such businesses as electronics, information processing, aerospace, biotechnology and the like. However, the use of electronic sensors, controls and monitoring systems has become commonplace, not only improving the primary function of the device (washing, drying, refrigerating, etc.), but also resulting in the more efficient use of electric energy, water and other inputs. The addition of new technology is especially important in developed nations, where high ownership rates limit much product demand to the replacement market. Added technology is a potential means to entice consumers to trade in functional equipment for new models, thereby shortening replacement cycles and boosting demand.

Among the most notable trends in appliance technology is the development of web-linked models. For example, Whirlpool is developing a refrigerator that contains a keypad that allows the user to order replacement groceries online. Maytag is designing home laundry equipment that would allow consumers to customize cycles and do wash by remote control. The model also has a scanner that reads clothes care labels in order to wash and dry properly. Haier introduced its Internet-connected washing machine in Europe in 2001. This appliance has a five-kilogram capacity and features adjustable speeds. The machine allows upgrades to be downloaded, can be remotely monitored and controlled, and has automatic problem warning and feedback, and a status display.

LGE launched the INTERNET DIGITAL DIOS REFRIGERATOR, an Internet-connected digital refrigerator, in June 2000. The machine can be used to access the Internet for viewing real-time price information on grocery products and...
The World Supply and Demand Section highlights the key issues that have affected the global 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.

Appliance Ownership Rates

The economic standard of living of the general population is the primary determinant of a country’s ability to support indigenous markets for household appliances, since appliances tend to be expensive products, whose purchase often involves the extension of credit. Of course, the fact that certain appliances are basic, virtually essential items in assuring a rudimentary quality of life results in a broader degree of ownership in most countries than is typical of highly desirable although less essential consumer products such as, say, automobiles; this is even true of many if not most poorer countries. For example, virtually all stable (i.e., nonnomadic) households utilize some type of cooking device, although these do not necessarily fall under the definition of major appliances. In addition, refrigeration equipment tends to be among the first convenience appliances purchased as household incomes rise in a country, and even many less advanced nations boast comparatively high refrigerator and/or freezer ownership rates.

The highest overall ownership rates for major household appliances are found in the industrialized countries located in North America (the US and Canada), Western Europe and the Asia/Pacific region (e.g., Australia, Japan, New Zealand, Singapore) as a matter of course. All of these countries exhibit virtually complete household saturation for the most basic appliances -- conventional cooking devices and refrigerators -- and near-saturation for washing machines (the presence of commercial laundry establishments in most countries obviates the need for all households to own such devices). In fact, ownership rates in the refrigerator and freezer category often exceed 100 percent in developed nations due to dual ownership of separate refrigerating and freezing units. In addition, the advanced nations also boast the highest ownership rates for the less essential, more convenience-oriented items such as clothes dryers and dishwashers. Within developing countries, ownership of the basic appliances can be comparatively high,
Supply & Demand by Country & Region

These Sections analyze supply and demand trends and consider the threats and opportunities for 6 regions and 27 individual countries.

Indonesia: Clothes Washers & Dryers

Demand for clothes washers and dryers in Indonesia is expected to rise 6.8 percent annually through 2005, representing above-average growth over the span, and will be driven by above-average gains in personal incomes, which will turn to these labor saving devices as an alternative to maid services. Washers will remain the dominant portion of demand, with over 80 percent of the total in 2005. Demand for clothes dryers will rise through 2005, but utilization will remain limited almost exclusively to the wealthiest households. Shipments of laundry equipment from facilities in Indonesia will increase 6.5 percent annually, reaching 295,000 units in 2005. While dependent on imports for its washing machine requirements (with Electrolux models quite popular), it is noteworthy that the country is a net exporter of clothes dryers, although production is by no means substantial by global norms.

Spain - Cooking Appliances Supply & Demand

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Households (million)</td>
<td>12.2</td>
<td>12.5</td>
<td>12.8</td>
<td>13.0</td>
<td>13.1</td>
</tr>
<tr>
<td>% with ranges &amp; ovens</td>
<td>95.9</td>
<td>96.8</td>
<td>97.7</td>
<td>98.5</td>
<td>99.2</td>
</tr>
<tr>
<td>% with microwave ovens</td>
<td>20.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooking Appliances in Use (million)</td>
<td>14.2</td>
<td>16.6</td>
<td>18.0</td>
<td>19.0</td>
<td>19.8</td>
</tr>
<tr>
<td>Ranges &amp; Conventional Ovens</td>
<td>11.7</td>
<td>12.1</td>
<td>12.5</td>
<td>12.8</td>
<td>13.0</td>
</tr>
<tr>
<td>Microwave Ovens</td>
<td>2.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooking Appliances Demand</td>
<td>2025</td>
<td>2150</td>
<td>2370</td>
<td>2610</td>
<td>2850</td>
</tr>
<tr>
<td>Ranges &amp; Conventional Ovens</td>
<td>1600</td>
<td>1750</td>
<td>1930</td>
<td>2070</td>
<td>2170</td>
</tr>
<tr>
<td>Microwave Ovens</td>
<td>425</td>
<td>950</td>
<td>1400</td>
<td>1650</td>
<td>1920</td>
</tr>
<tr>
<td>net exports</td>
<td>-55</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooking Appliances Shipments</td>
<td>1970</td>
<td>2150</td>
<td>2370</td>
<td>2610</td>
<td>2850</td>
</tr>
<tr>
<td>Ranges &amp; Conventional Ovens</td>
<td>1720</td>
<td>2050</td>
<td>2220</td>
<td>2470</td>
<td>2720</td>
</tr>
<tr>
<td>Microwave Ovens</td>
<td>250</td>
<td>200</td>
<td>150</td>
<td>140</td>
<td>130</td>
</tr>
</tbody>
</table>

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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
- financial requirements
- mergers & acquisitions
- industry restructuring

**INDUSTRY STRUCTURE**

**Marketing & Distribution**

As with any industry, effective marketing is a key factor for success in the world major household appliance business. The principal marketing-related competitive variables for the industry are price, product quality and performance, and company reputation. The relative importance of each factor varies according to the type of product involved and its application.

Because brand name recognition is a major factor in customer purchase selections and users tend to be very brand loyal, most of the larger appliance manufacturers follow a strategy of product differentiation. Manufacturers emphasize product features and brand name reputation to distinguish their products. Advertising and product design help to create a particular brand image, as does participation in related activities.

Other white goods 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 firms are usually quick to market with updates and are perceived to provide higher quality products and better service than a supplier involved in numerous product categories. 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 product marketing. Major producers have websites detailing extensive product information. These sites allow users to see the full range of products available from a company, without the floor space limitations of a brick-and-mortar store. Retail stores are also moving into online sales, as evidenced by the 2000 launch of Lowe’s web-based store, which offers a wide array of major appliances.

Retail establishments are the dominant source of distribution since they are virtually the only source for consumers. Retail establishments receive the products...
The Profiles Section analyzes 38 companies active in the world appliance 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

Merloni Elettrodomestici SpA
Viale Aristide Merloni 47
60044 Fabriano
Italy
39-0732-6611
http://www.merloni.com

Merloni Elettrodomestici manufactures and sells major household appliances. The Company had 2000 sales of $1.5 billion (Western Europe accounted for $1.1 billion, Eastern Europe for $182 million and the rest of the world for $193 million). Merloni employed 13,670 in 2000.

According to Merloni, the Company produced eight million household appliances annually as of 2000, making it the third-largest European producer. Merloni produces cookers, ovens, hobs, refrigerators, freezers, dishwashers, washing machines, dryers and combination washer/dryers. These products are sold under the INDESIT and ARISTON brand names. According to the Company, INDESIT, which is a brand that features a youth-oriented design, had a ten-percent share of the Italian market as of October 2001.

The ARISTON line includes several digital and Internet-connected products. For example, the ARISTON OPERA refrigerator, which was introduced in mid 2001, is a digital refrigerator equipped with an electronic display. The display allows the user to control the temperature and choose functions. The ARISTON OPERA also has several compartments that can be adjusted to different temperatures. In late 2001, the Company introduced a self-cleaning ARISTON oven to the Italian market. This oven is equipped with a digital display and fast clean function, which automatically cleans the oven by increasing the oven temperature and burning residue. The oven is also capable of downloading recipes from the Internet.

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Companies Profiled

Amica Wronki SA
Antonio Merloni SpA
AM Appliance Group
Asko Appliances
BPL Group
BPL Sanyo Utilities and Appliances Ltd.
BSH Bosch und Siemens Hausgeraete GmbH
BHST Washing Appliances Ltd.
Candy Elettrodomestici SpA
Daewoo Electronics Co. Ltd.
De’ Longhi SpA
Kenwood Appliances plc
Electrolux AB
e2 Home
Email Ltd.
Fisher & Paykel Appliances Holdings Ltd.
General Electric Co.
Camco Incorporated
General Domestic Appliances Ltd.
Mabe SA de CV
McLean
Goodman Holding Co.
Gorenje gospodinjski aparatid
Haier Group Co.
Hayes Haier Appliances Co. Ltd.
Nigeria Haier Co.
Koc Holding AS
Arcelik AS
Beko UK Ltd.
LG Group
Liebherr-International AG
Matsushita Electric Industrial Co. Ltd.
AP National Sales Co. Ltd.
National Panasonic Malaysia Sdn Bhd
PT National Gobel
Maytag Corp.
Rongshida-Maytag
Trembath Appliance Imports Ltd.
Merloni Elettrodomestici SpA
Stinol
Wuxi Little Swan Merloni Dishwasher Co. Ltd.
Miele & Cie GmbH & Co.

Mitsubishi Electric Corp.
Antah Melco Sales & Services Sdn Bhd
Mondragon Corporacion Cooperativa Edesa
Fagor Electrodomesticos
Moulinex-Brandt Group
Brandt SA
Esswein
Norfrost
Samsung Group
Sanyo Electric Co. Ltd.
Tottori Sanyo Electric Co. Ltd.
Sharp Corp.
Sub-Zero Freezer Co. Incorporated
Tatung Co.
Toshiba Corp.
Uponor Oyj
Videocon International Ltd.
Viking Range Corp.
Vitro Corporativo SA de CV
Vitromatic SA de CV
Whirlpool Corp.
Brasmotor SA
Multibras SA Electrodomesticos
Vitromatic SA de CV
Wood (WC) Co. Ltd.
Wuxi Little Swan Co. Ltd.
Wuxi Little Swan Merloni Dishwasher Co. Ltd.

World Major Household Appliances #1508

Order form on last page
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.
The Freedonia Group, Inc. is a leading international industry study/database company.

Since 1985, Freedonia has published over 1,600 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 Electric Housewares & Personal Care Appliances
- Power & Hand Tools
- Commercial Refrigeration Equipment
- World Power Tools

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

**Advantages of Freedonia Reports**

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

**Consistency**
Our Economics Group develops indicators that are used by all analysts. Therefore, every Freedonia study is based on a consistent set of economic assumptions (GDP, residential fixed investment, number of households, etc.).

**Reliable forecasts**
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.

**One-on-one interviews**
All studies are produced by conducting interviews with key industry participants and end-users.

**Proprietary electronic database**
Freedonia’s analysts can tap into an extensive in-house electronic database containing corporate literature (including private company information), trade publications, government reports and many other sources of information.
About Our Customers

Freedonia’s clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies:

- Key Executives
- Corporate Planners
- Market Researchers
- Financial Analysts
- Information Centers
- New Product Developers
- Merger & Acquisition Specialists

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 appliance industry include: Antonio Merloni, BSH Bosch und Siemens Hausgeraete, Electrolux, Email Limited, Merloni Elettrodomestici and Whirlpool.
World Electric Housewares & Personal Care Appliances
This new study forecasts the world market for electric housewares and personal care appliances. It presents historical data for 1990, 1995, 2000 and forecasts to 2005 and 2010 by type (e.g., coffee and tea makers; electric shavers, trimmers and clippers; hair dryers and curling irons/brushes; portable fans; toasters and toaster ovens; vacuum cleaners) and for 6 geographic regions and 25 countries. The study also examines the market environment, details industry structure and market share, and profiles key firms.
#1521. . . . . . . 2/02. . . . . . . . . . $4,700

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

Gaskets & Seals
The US market for gaskets and seals will grow 4.8% annually, driven by healthy aftermarket opportunities and improvements in motor vehicle production. Gains will be led by high-performance products such as advanced fiber gaskets, expanded graphite gaskets and shaft seals. Motor vehicles will remain the largest market and will grow at above-average rates. This study analyzes the $7.6 billion US gasket and seal industry to 2005 and 2010 by type and market. It also evaluates market share and profiles key producers.
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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 key profiles.
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Industrial Controls
US demand for industrial controls will grow 6% annually, driven by continuing innovation in solid-state controls and rising demand for software and system integration services. Advanced controls will outpace conventional devices. Durable goods industries will remain the largest market, while services, chemicals and utilities grow the fastest. This study analyzes the $14.5 billion US industrial controls industry to 2005 and 2010 by product and market. It also includes key company profiles and market share.
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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 key profiles.
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World Gaskets & Seals
World gasket and seal demand will grow 5.7% annually through 2005. Motor vehicles will remain the largest market while electrical and electronic equipment uses grow the fastest. High-end products such as mechanical face seals, rotary oil seals and nonmetallic gaskets made of advanced materials have the best growth prospects. This study analyzes the US$22 billion world gaskets and seals industry to 2005 and 2010 by product, source, region and for 34 countries. It also details market share and profiles key firms.
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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 market. It also evaluates market share and profiles key firms.
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