



*“Latest Trends in Major Domestic Appliances efficiency
in Europe, Russia, and Ukraine”*

Focus on Energy Consumption

• GfK. Growth from Knowledge

GfK

GfK Methodology and Mission

2

GfK brings market knowledge and expertise to all market players

Our information is the tool used by the industry to take strategic and tactic decisions on the market

GfK R&T is Data provider and CE, IT, MDA, and SDA markets expert

GfK R&T is auditing continuously the sell out of shops on item level in all western and eastern European countries

Agenda

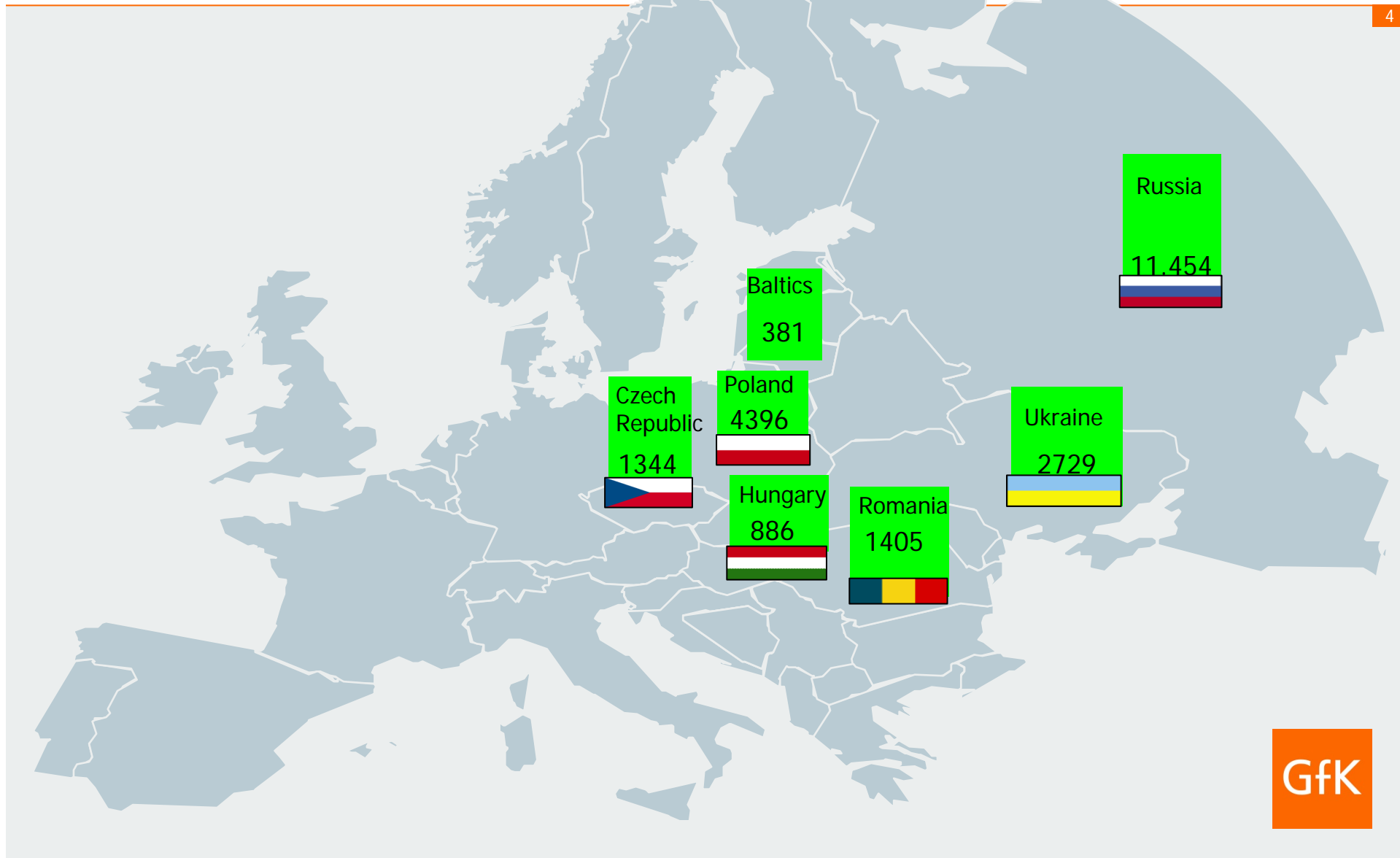
3

- 1 Total Market of MDA Appliances**
- 2 Washing Machines / Refrigerators: substitution rhythm**
 - **Evolution of Segments**
 - **Energy Consumption**
 - **Price**

MDA9

Sales Ths. Units
2010

GfK Panelmarket Data



MDA9

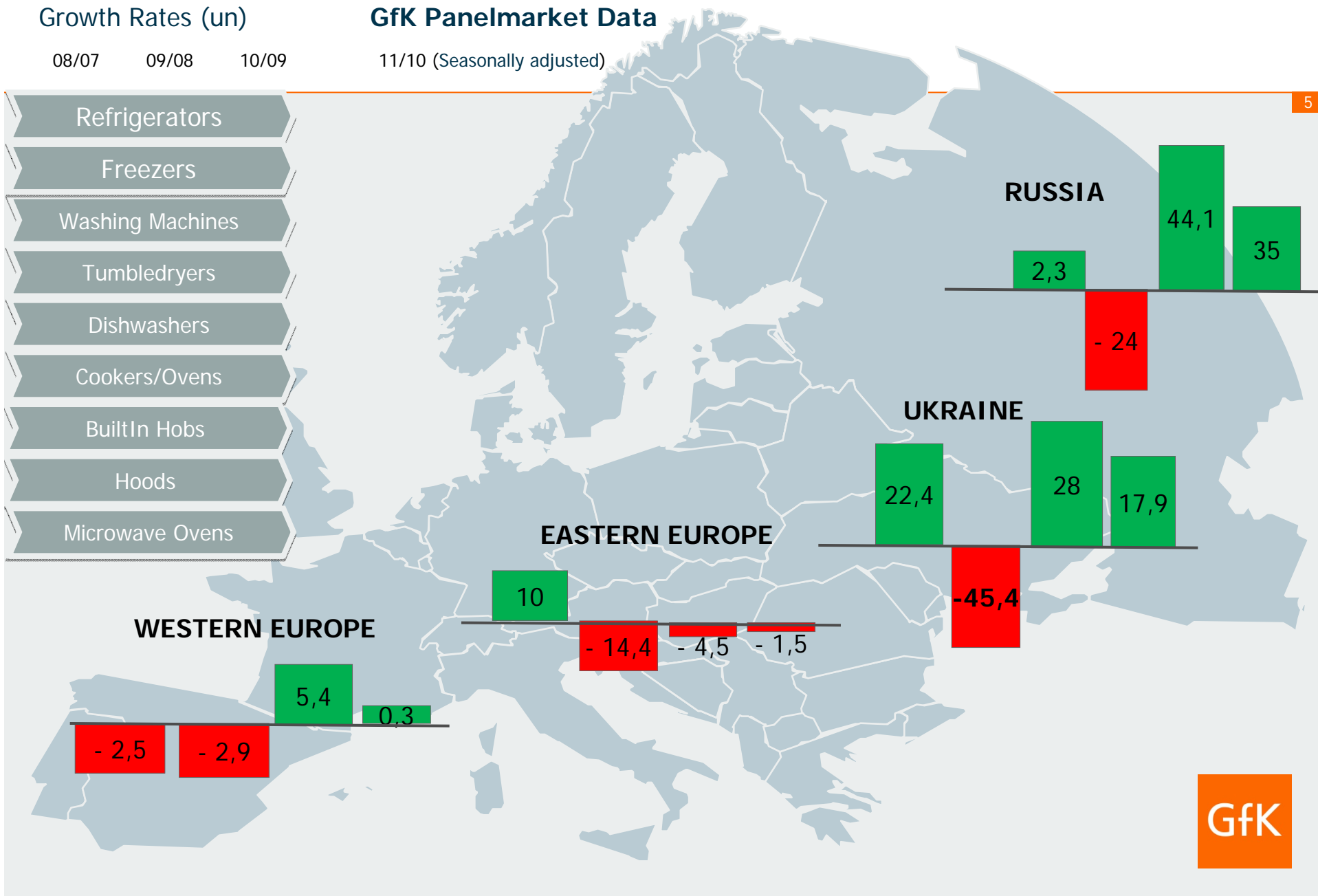
Growth Rates (un)

08/07 09/08 10/09

GfK Panelmarket Data

11/10 (Seasonally adjusted)

- Refrigerators
- Freezers
- Washing Machines
- Tumbledryers
- Dishwashers
- Cookers/Ovens
- BuiltIn Hobs
- Hoods
- Microwave Ovens



MDA 9

Sales Ths. Units

GfK Panelmarket

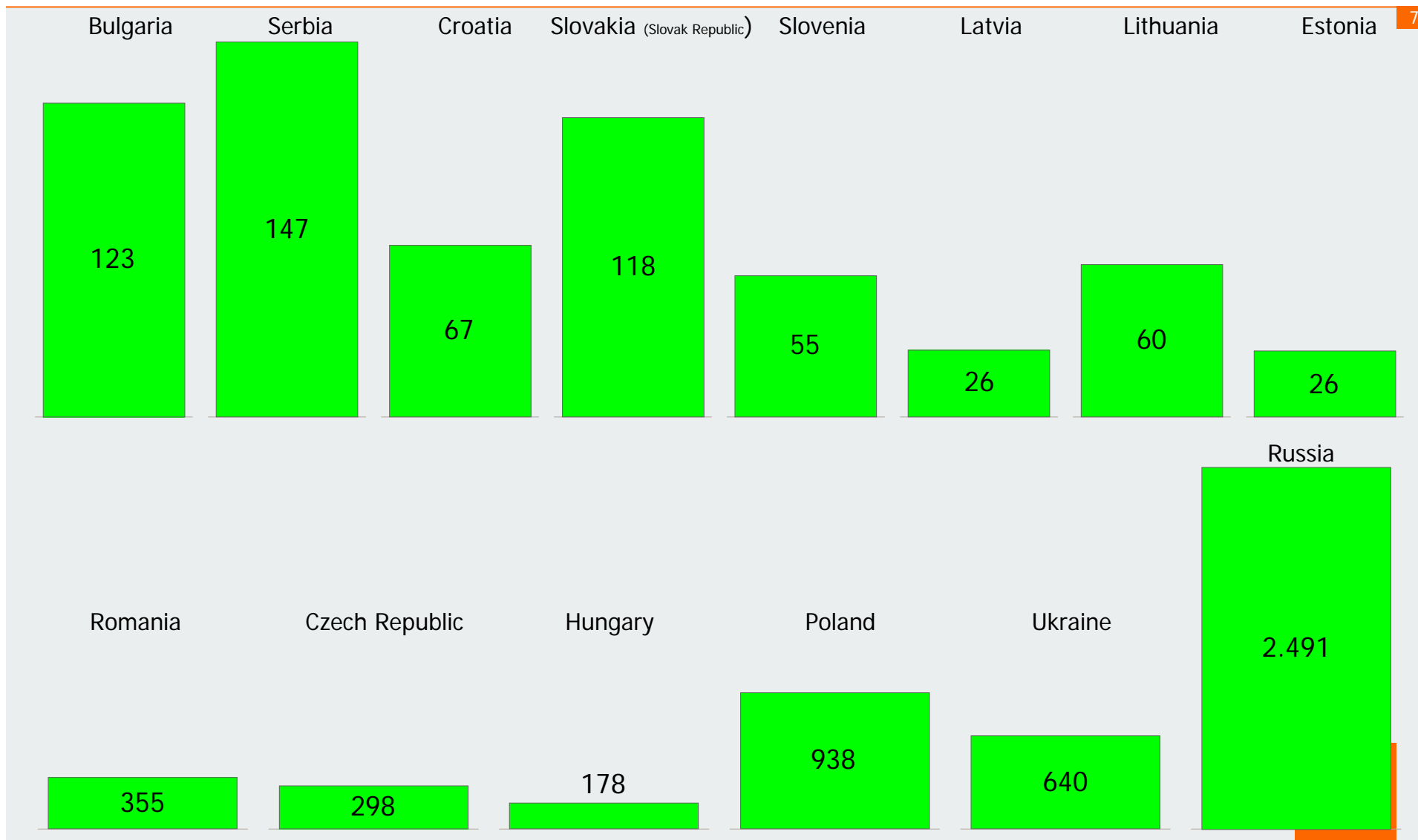
Growth_% 2007-2010- Seasonaly Adj.Growth_% 2010-> 2011



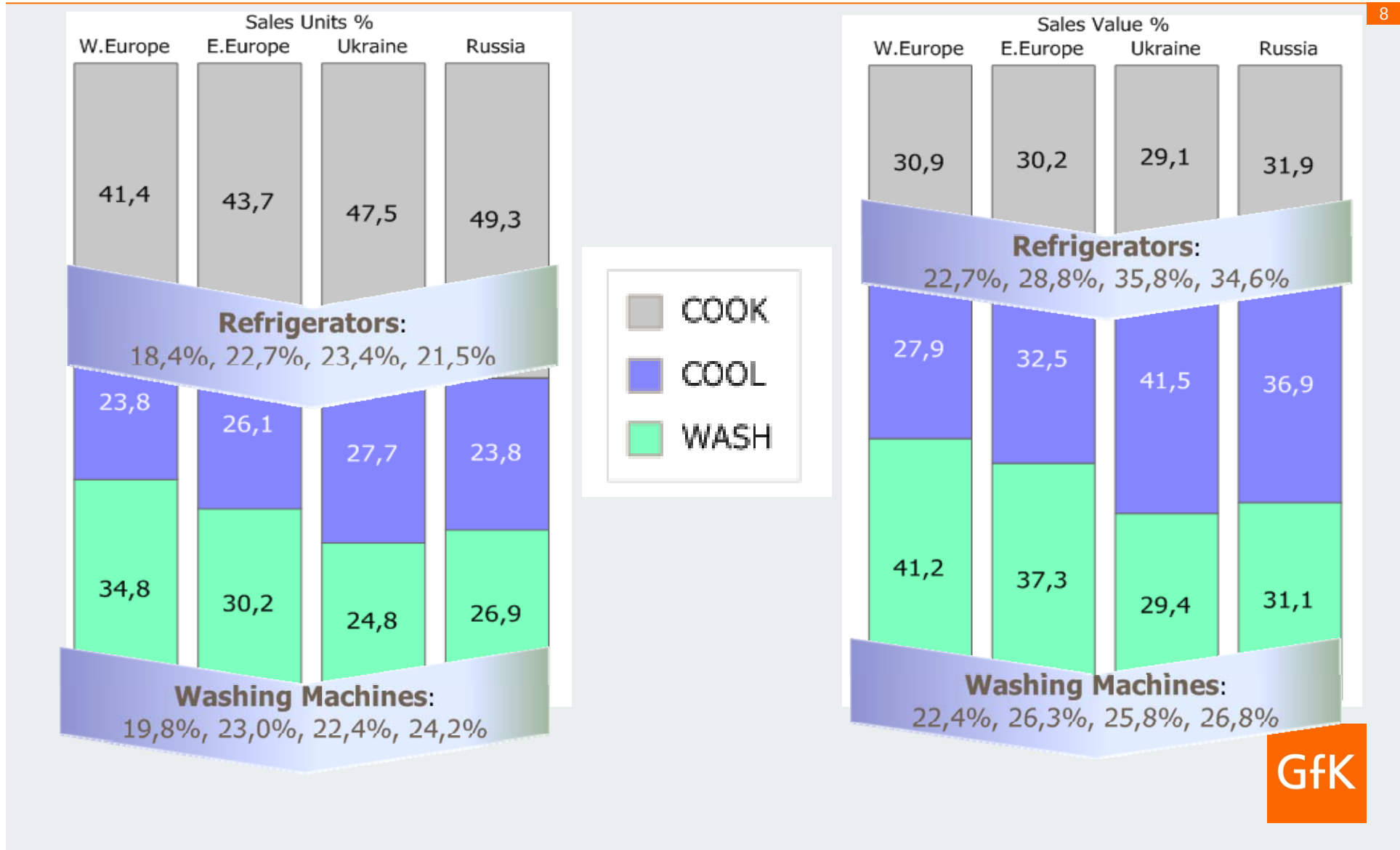
COOLING

Sales Ths. Units
2010

GfK Panelmarket



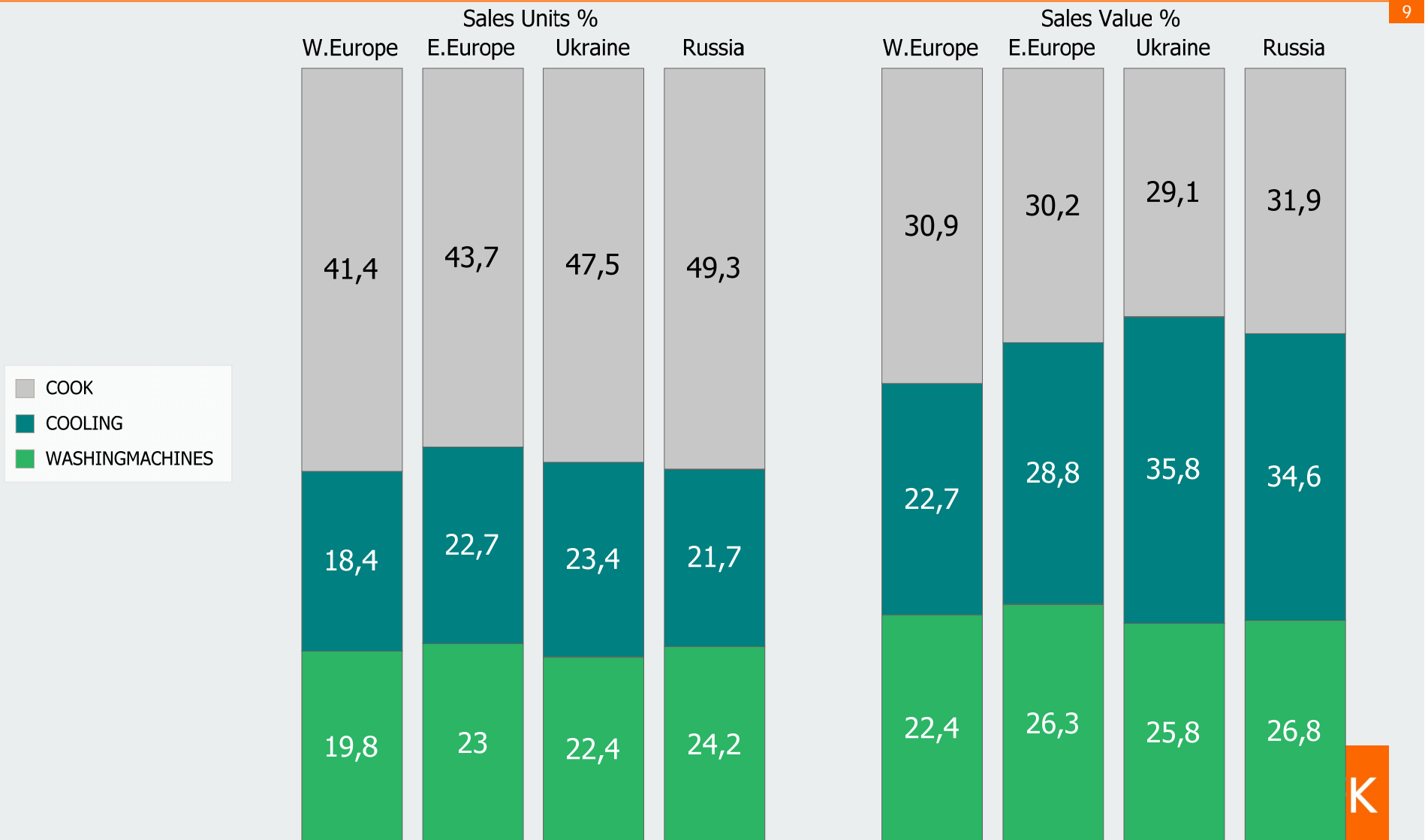
Importance of the Cooking/Cooling/Washing Appliance in Western Europe (13 countries), Eastern Europe(11 countries), Russia, Ukraine



MDA 9

Sales Units %, Sales Value %
2010

GfK Panelmarket

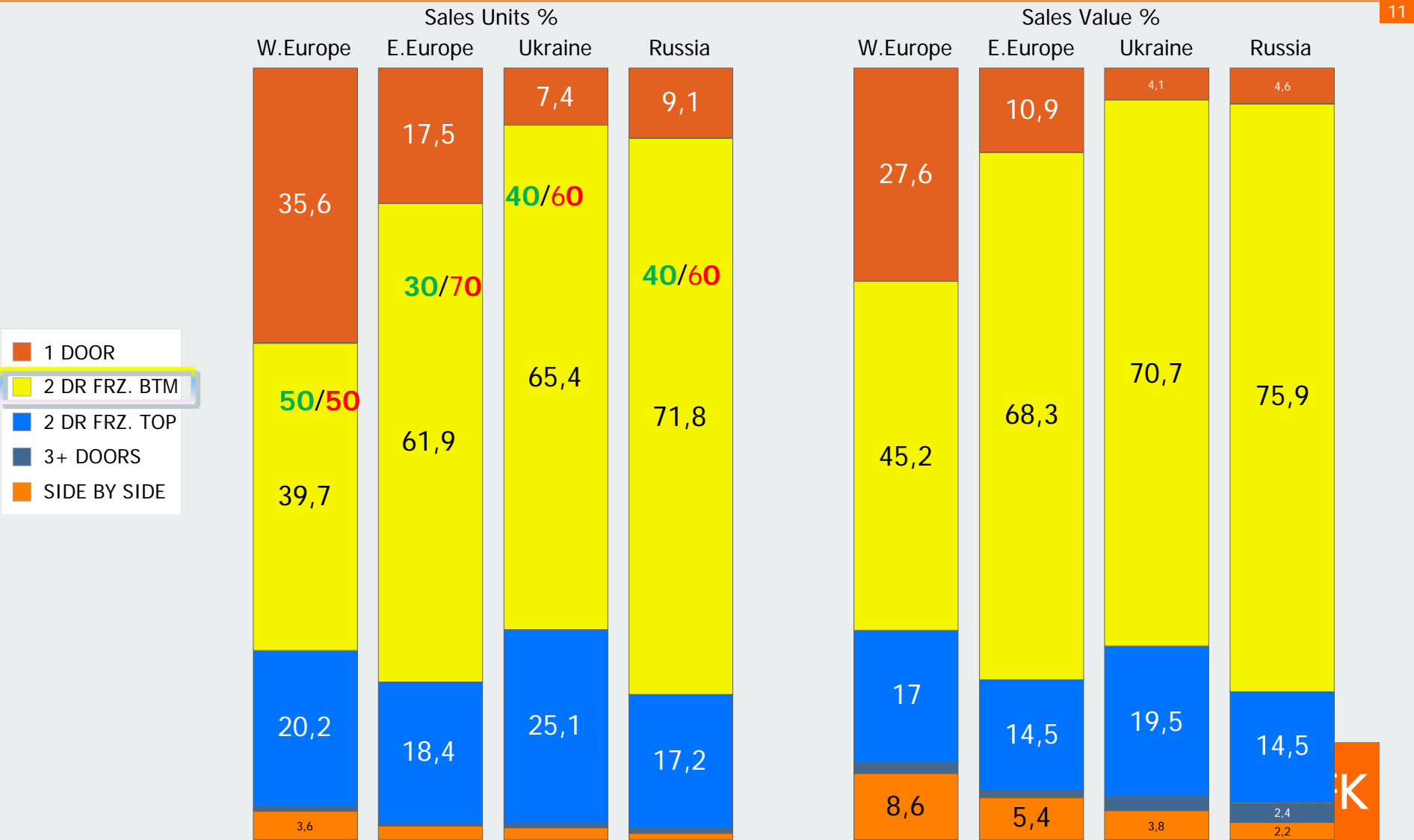


Refrigerators

Refrigerators

Importance of Types on Refrigerators Market 2010

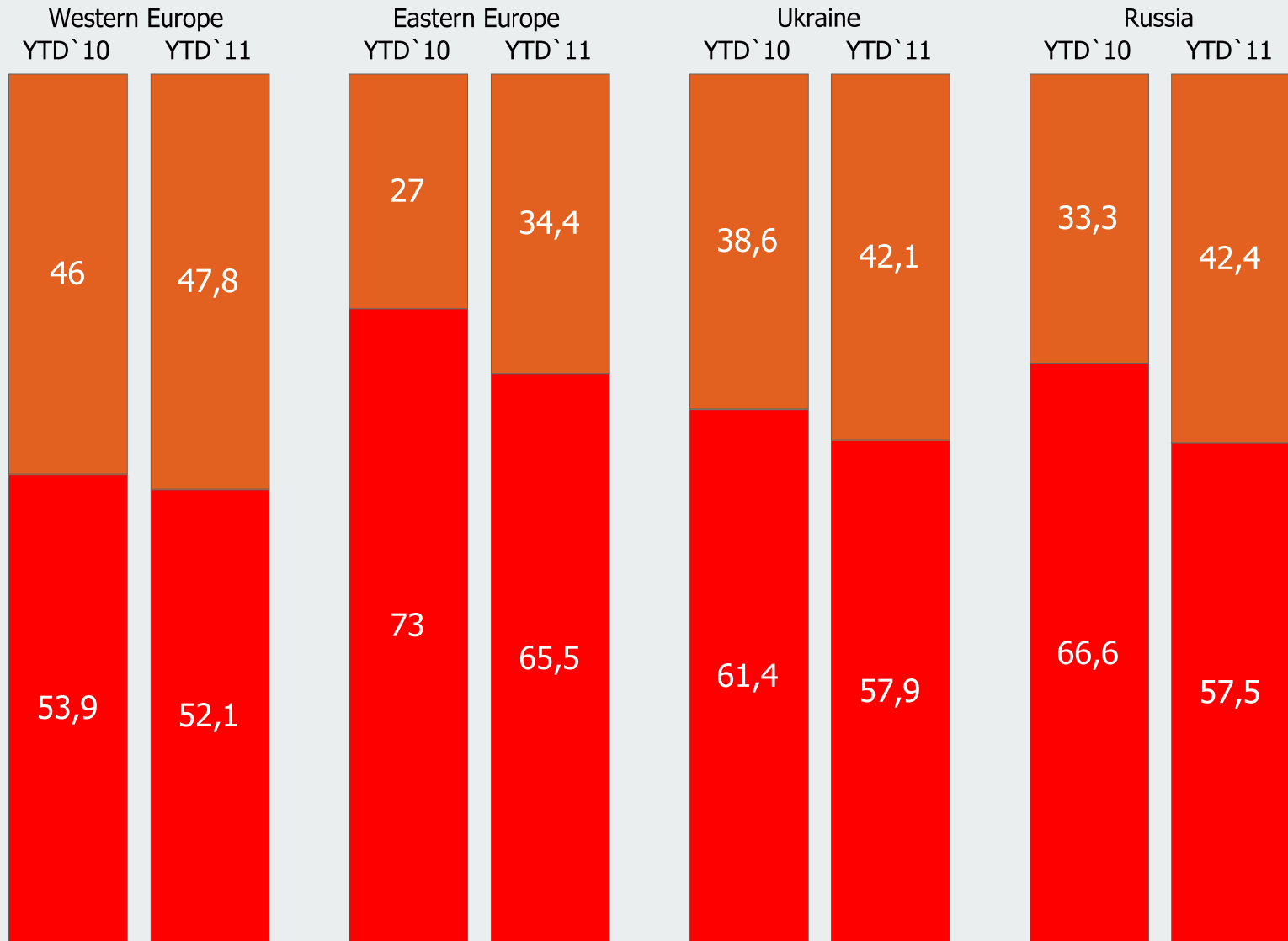
GfK Panelmarket Data



COOLING

Sales Units %
YTD `11

GfK Panelmarket
2 DR FRZ. BTM

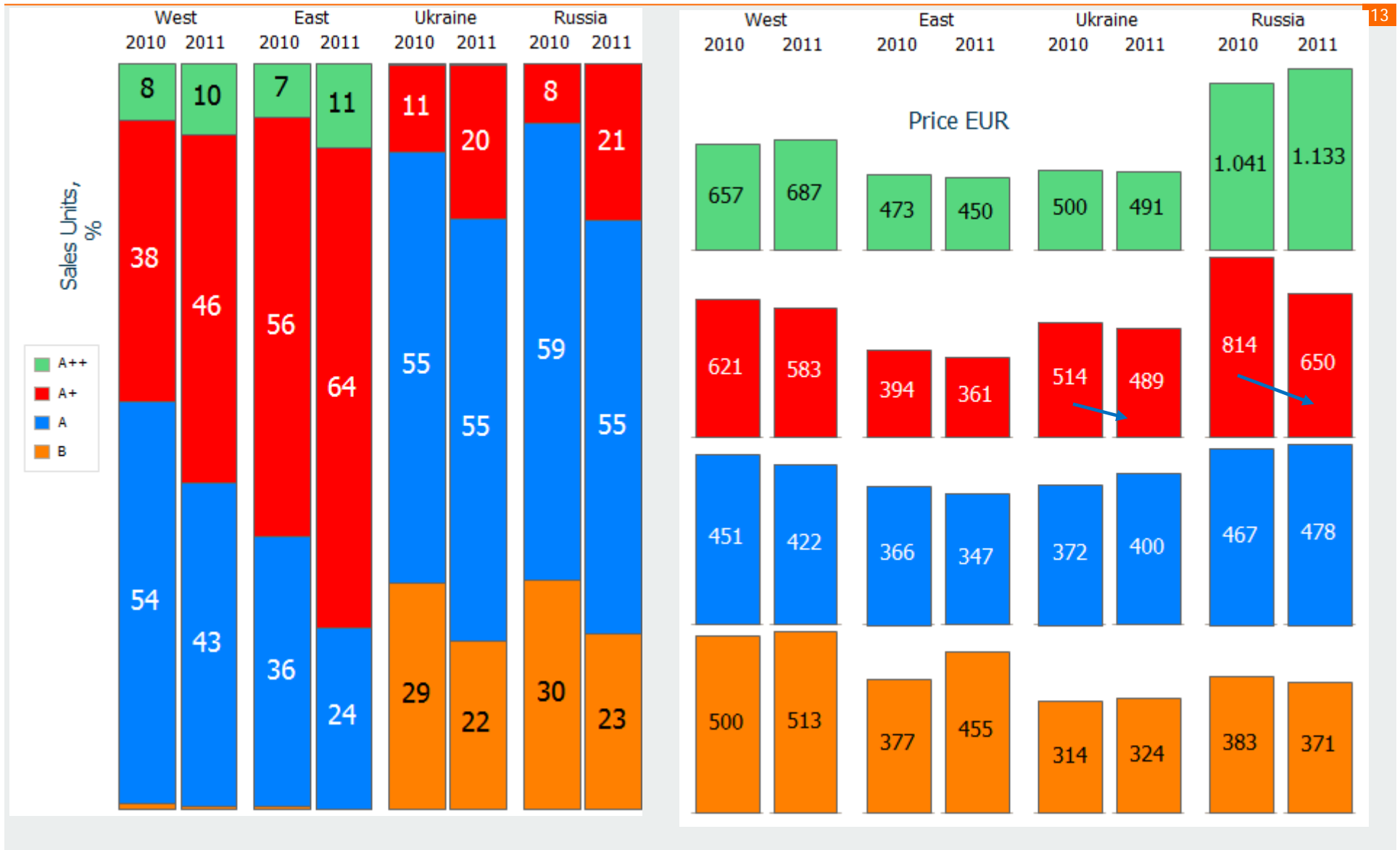


Refrigerators

GfK Panelmarket Data

Seasonally Adjusted 2011/2010

2 DR FRZ. BTM

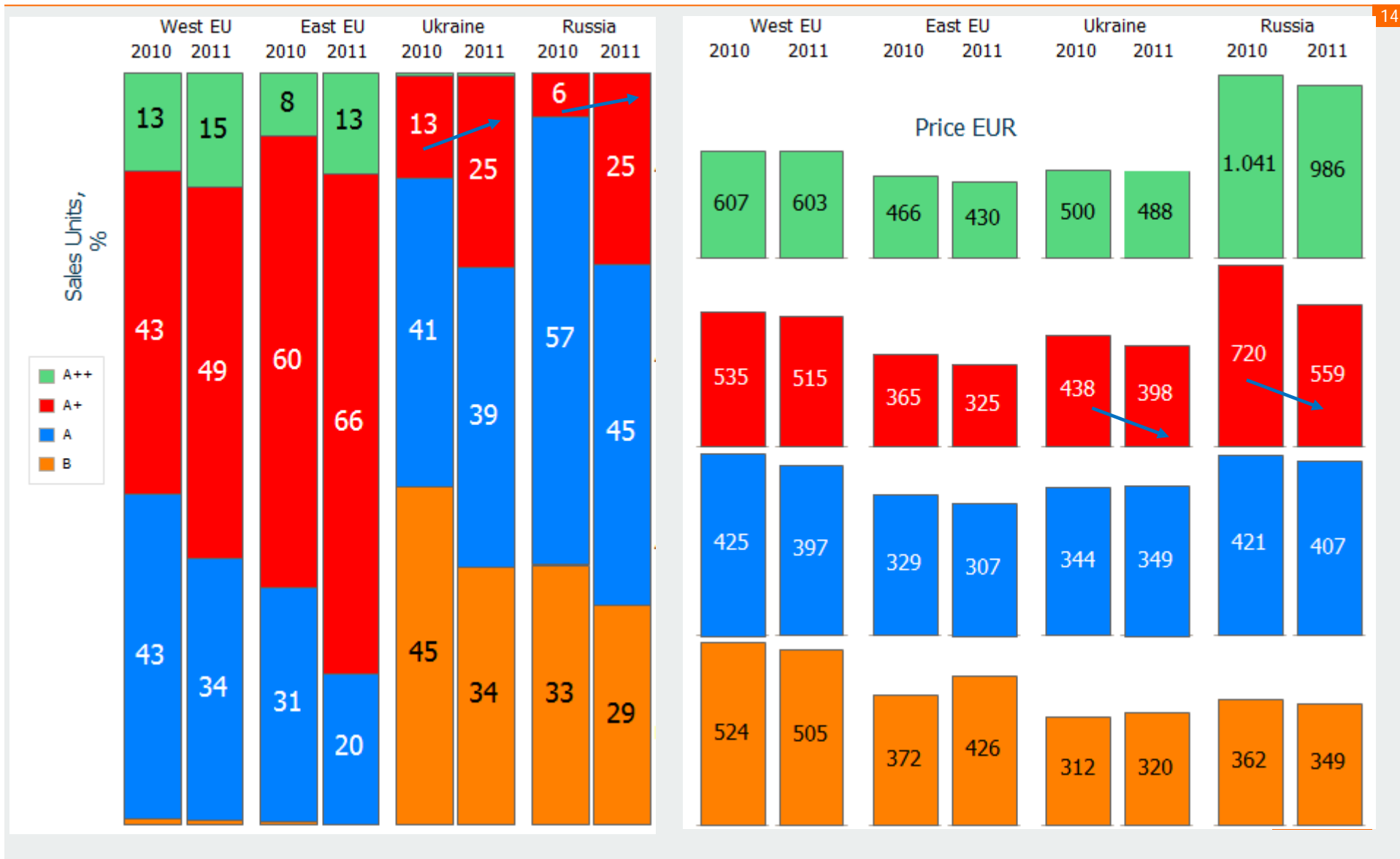


Refrigerators

GfK Panelmarket

Seasonally Adjusted 2011/2010

2 DR FRZ. BTM w/o NoFrost system

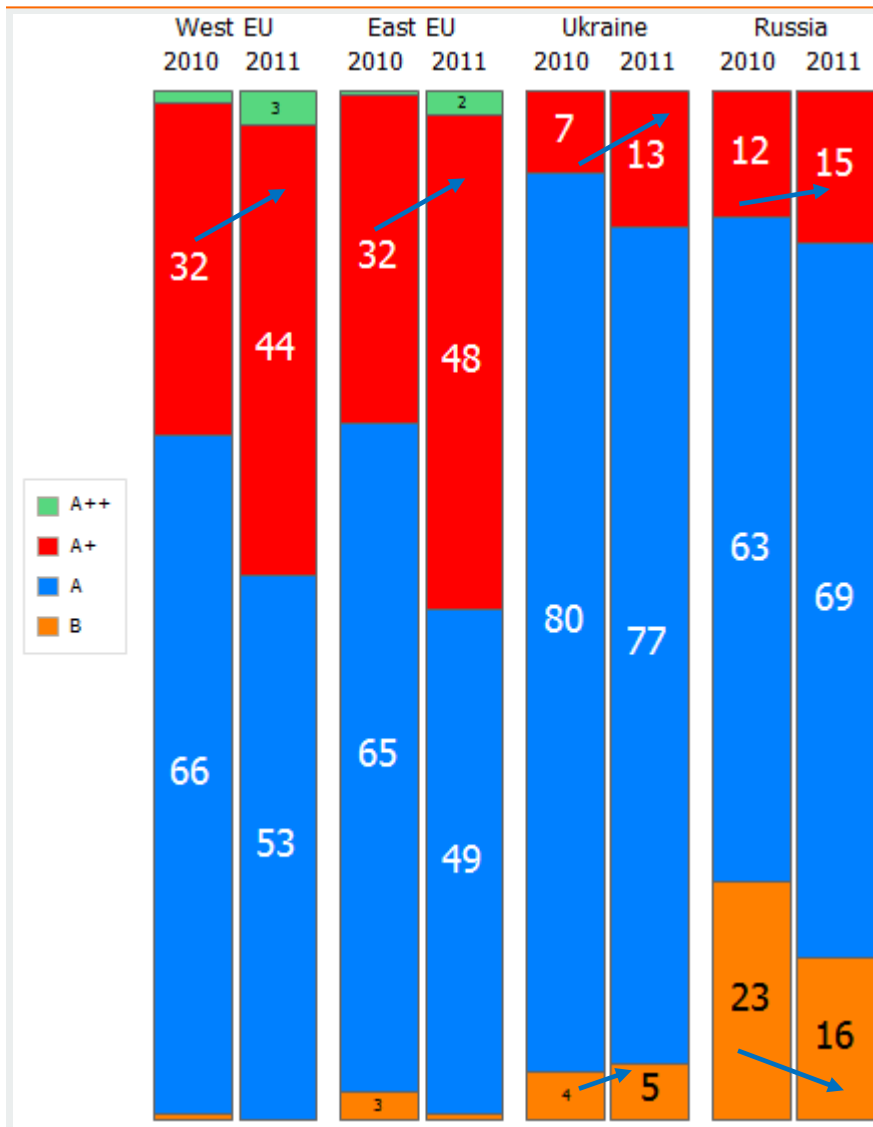


Refrigerators

GfK Panelmarket

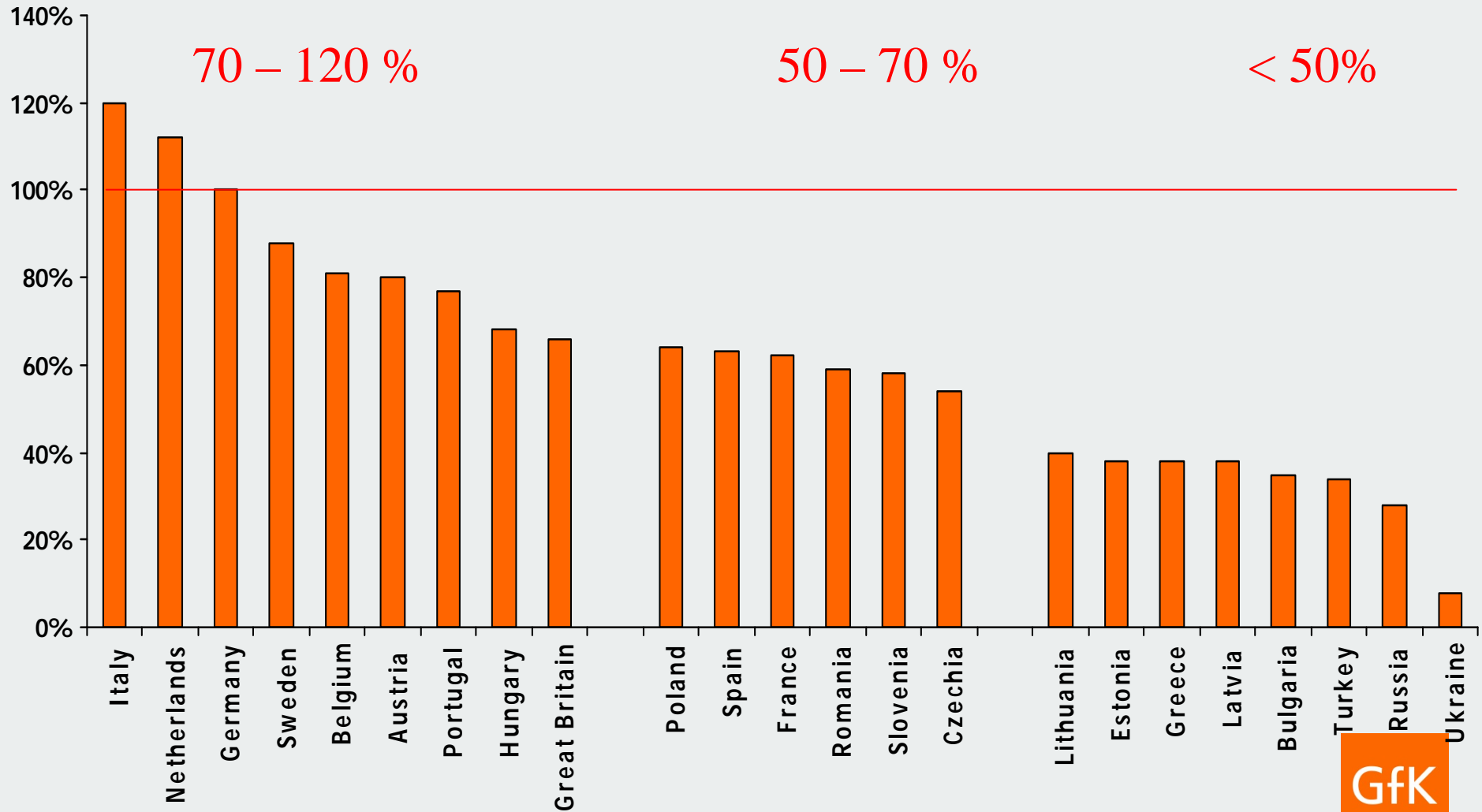
Seasonally Adjusted 2011/2010

2 DR FRZ. BTM with NoFrost system



Energy cost in West and East Europe

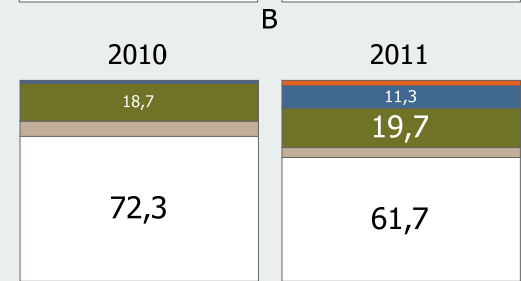
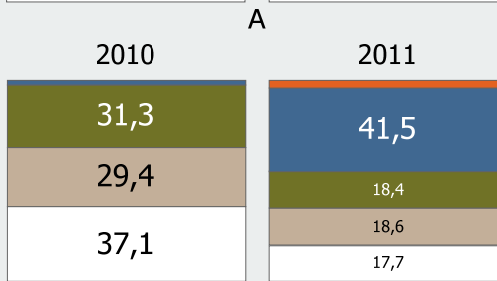
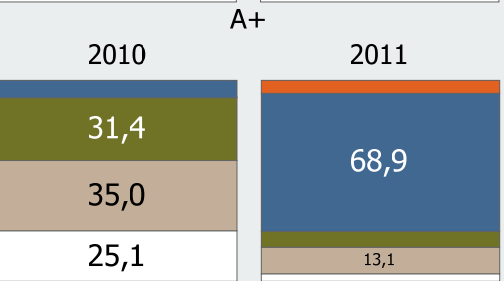
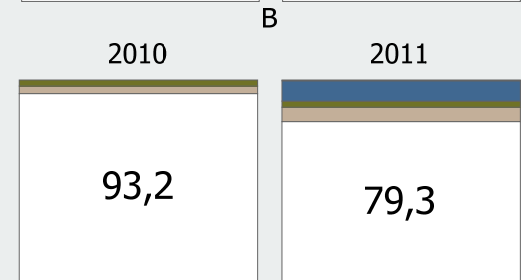
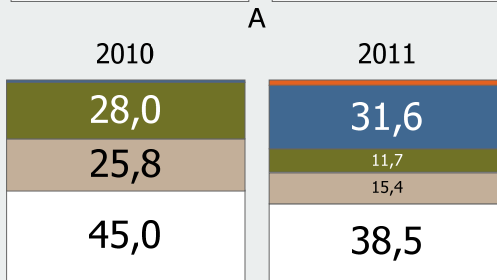
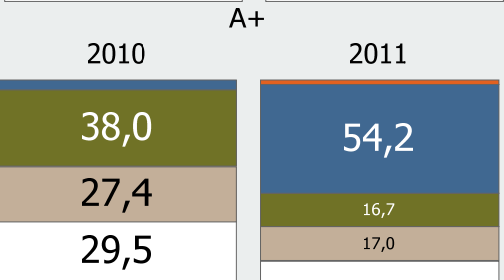
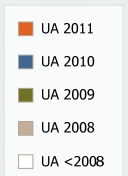
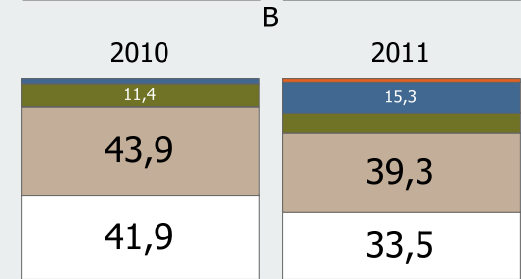
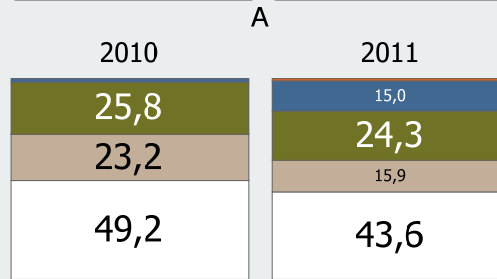
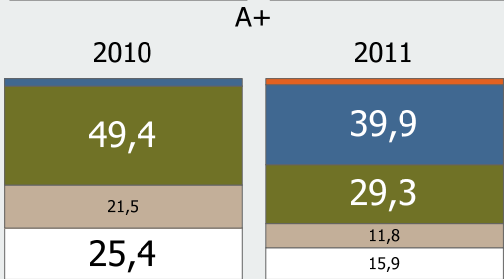
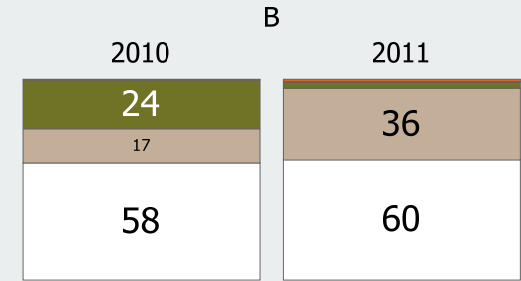
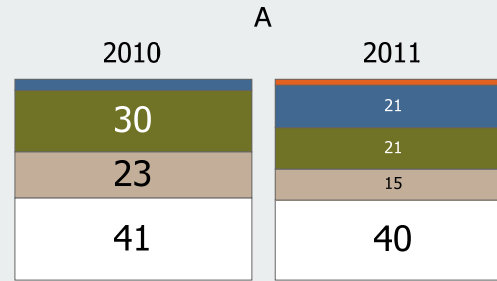
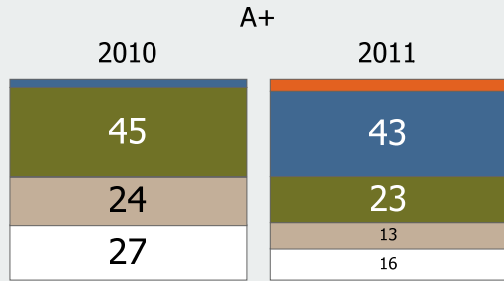
Germany = 100%



COOLING

Sales Units %
2011

GfK Panelmarket
2 DR FRZ. BTM



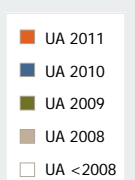
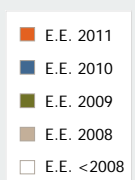
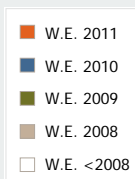
COOLING

Sales Units %

Seasonally Adjusted 2011

GfK Panelmarket

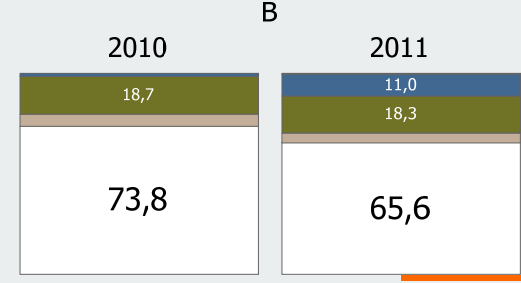
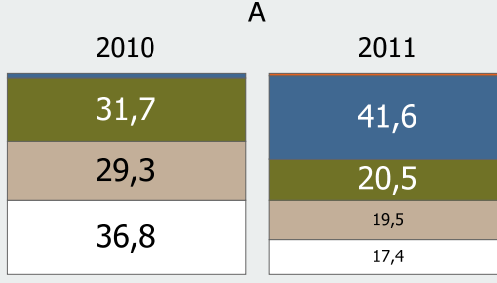
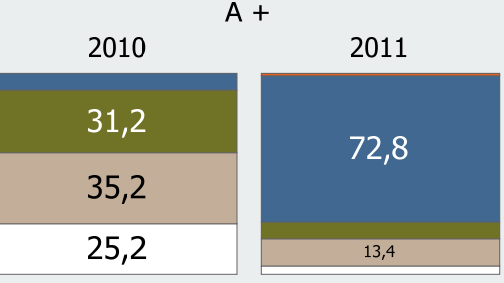
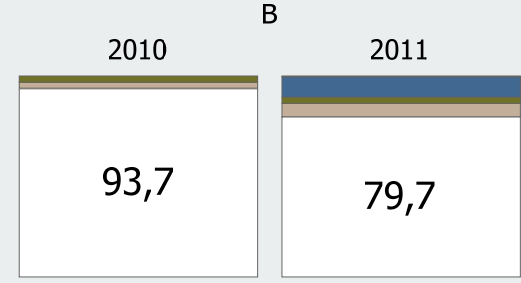
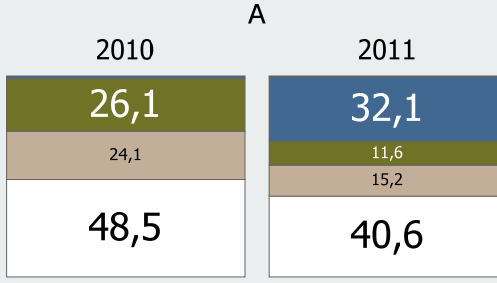
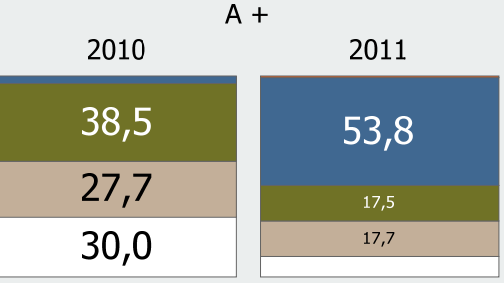
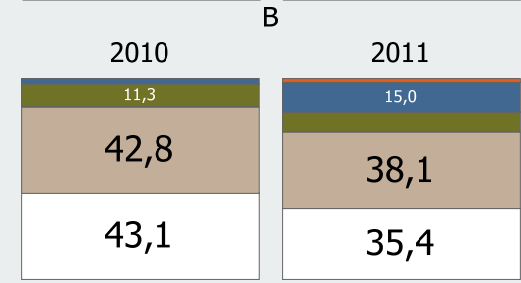
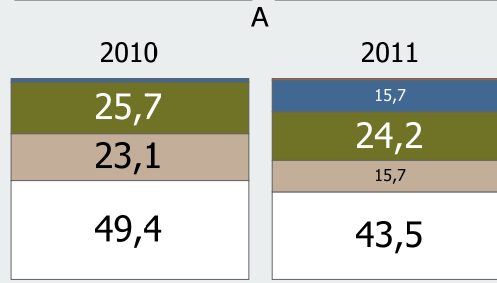
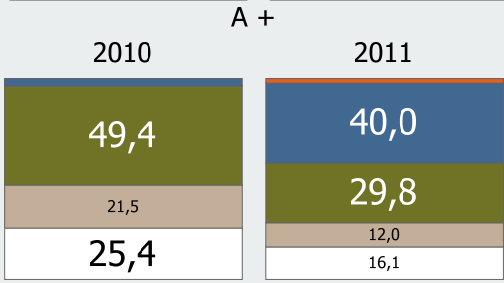
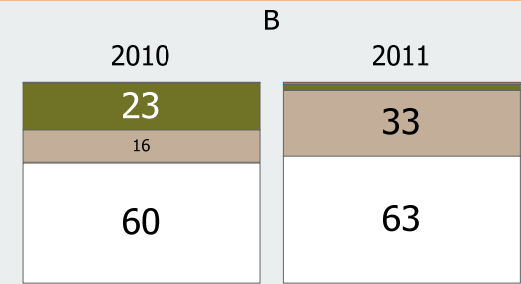
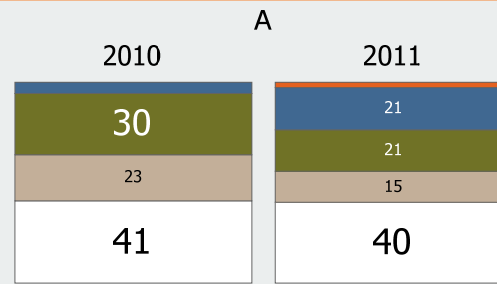
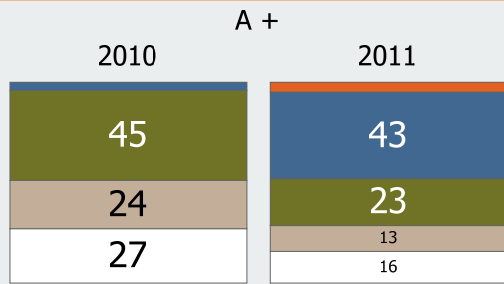
2 DR FRZ. BTM



COOLING

Sales Units %
2011

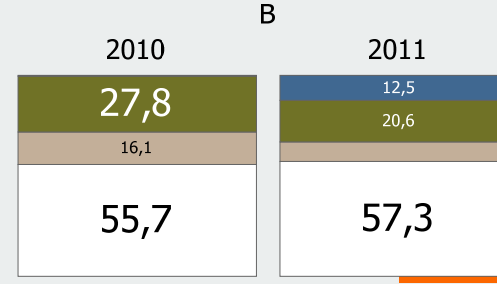
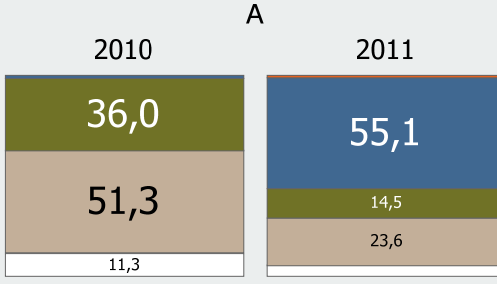
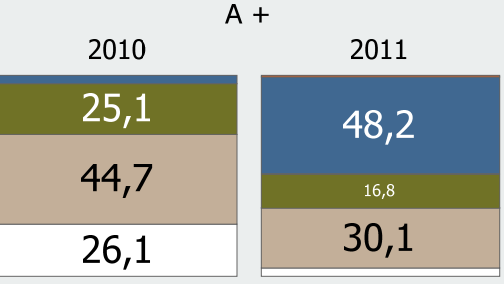
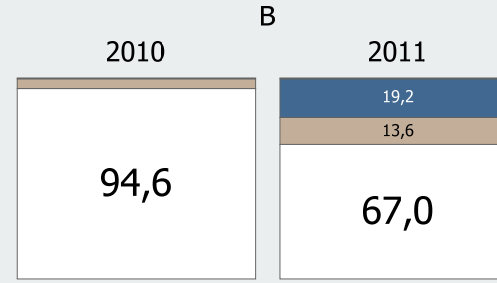
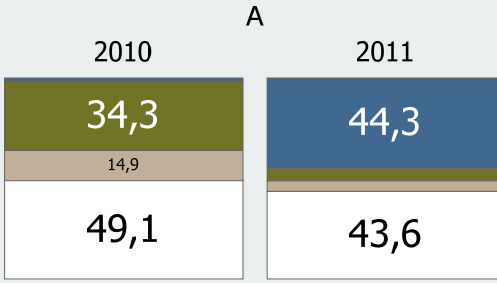
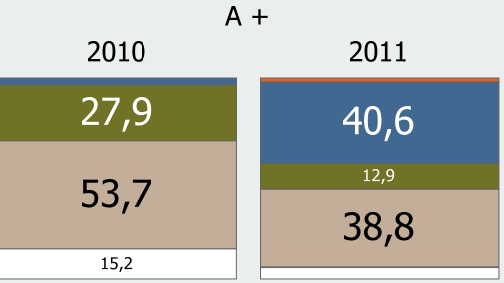
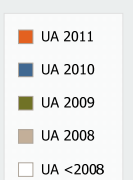
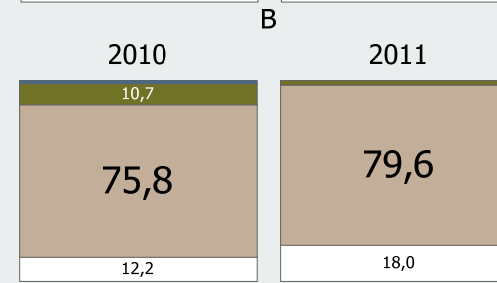
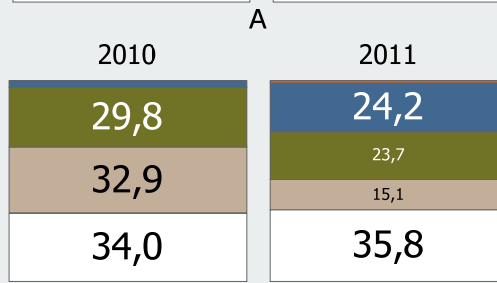
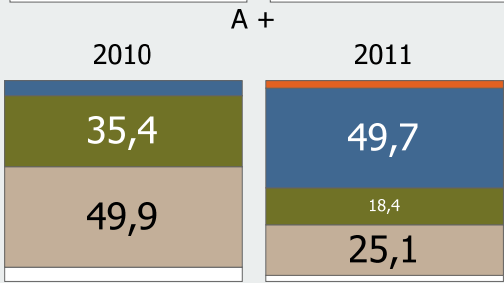
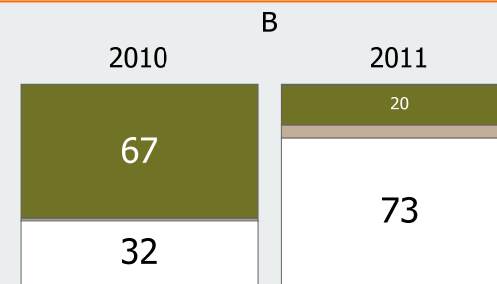
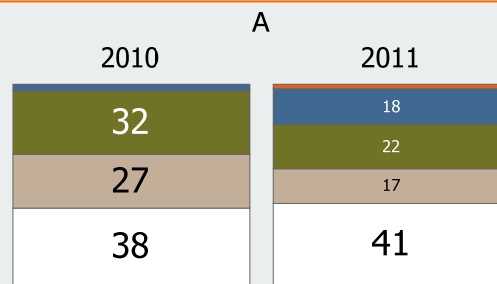
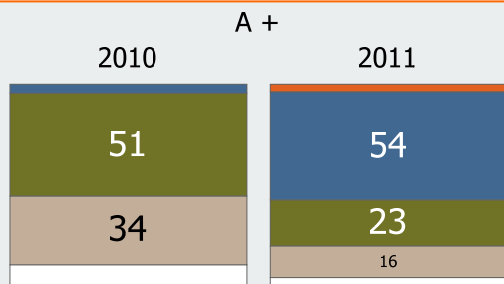
GfK Panelmarket
2 DR FRZ. BTM



COOLING

Sales Units %
2011

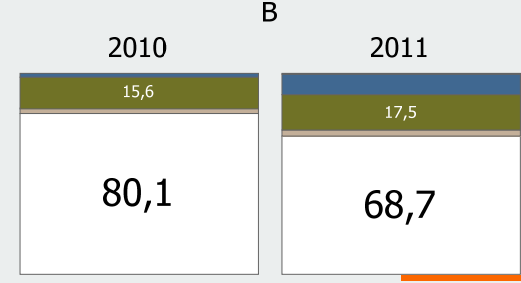
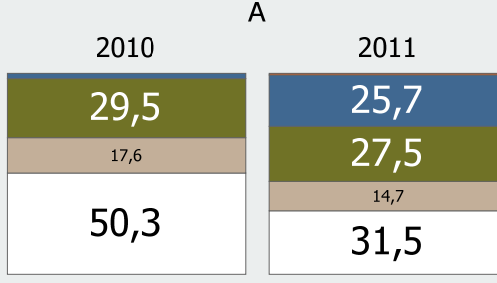
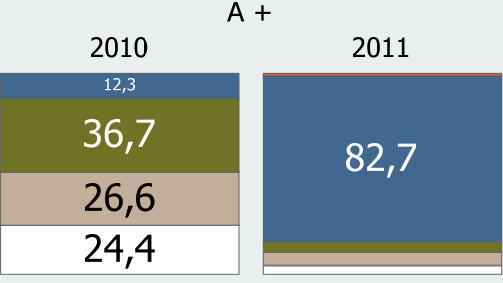
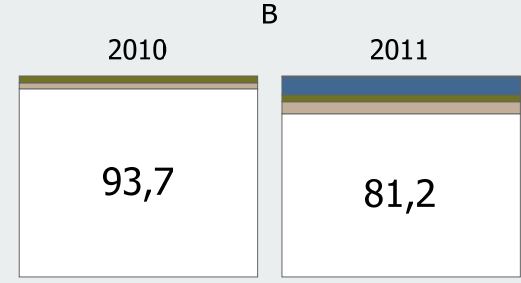
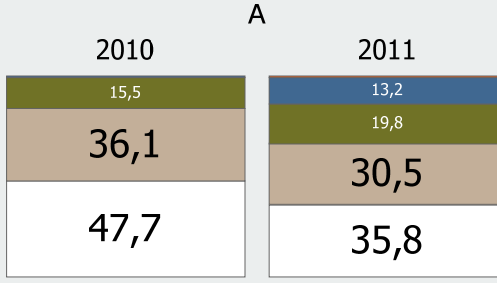
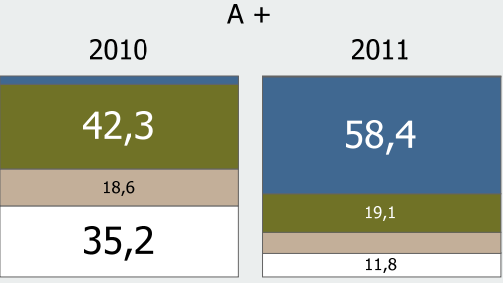
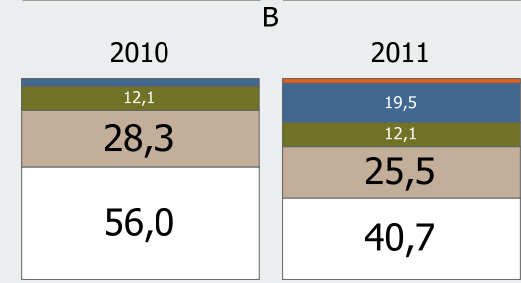
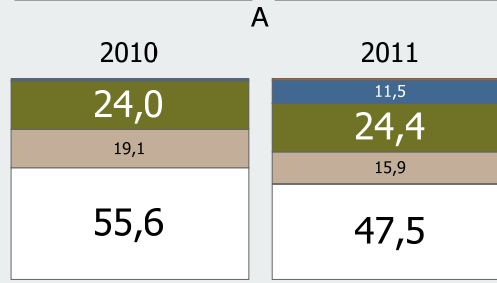
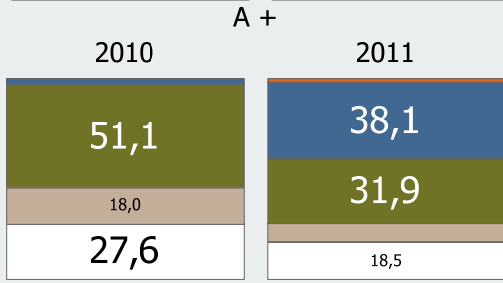
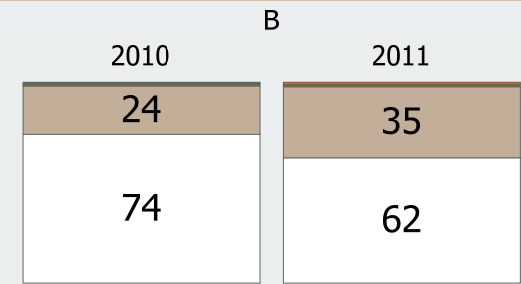
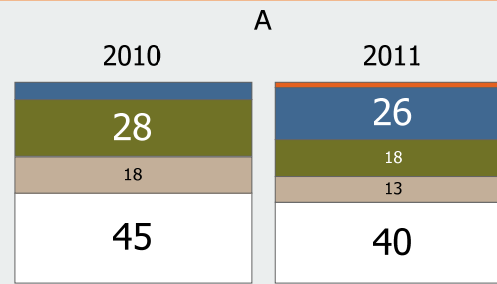
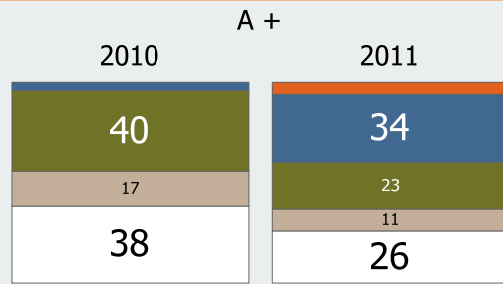
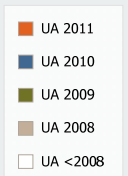
GfK Panelmarket
2 DR FRZ. BTM YES



COOLING

Sales Units %
2011

GfK Panelmarket
2 DR FRZ. BTM NO



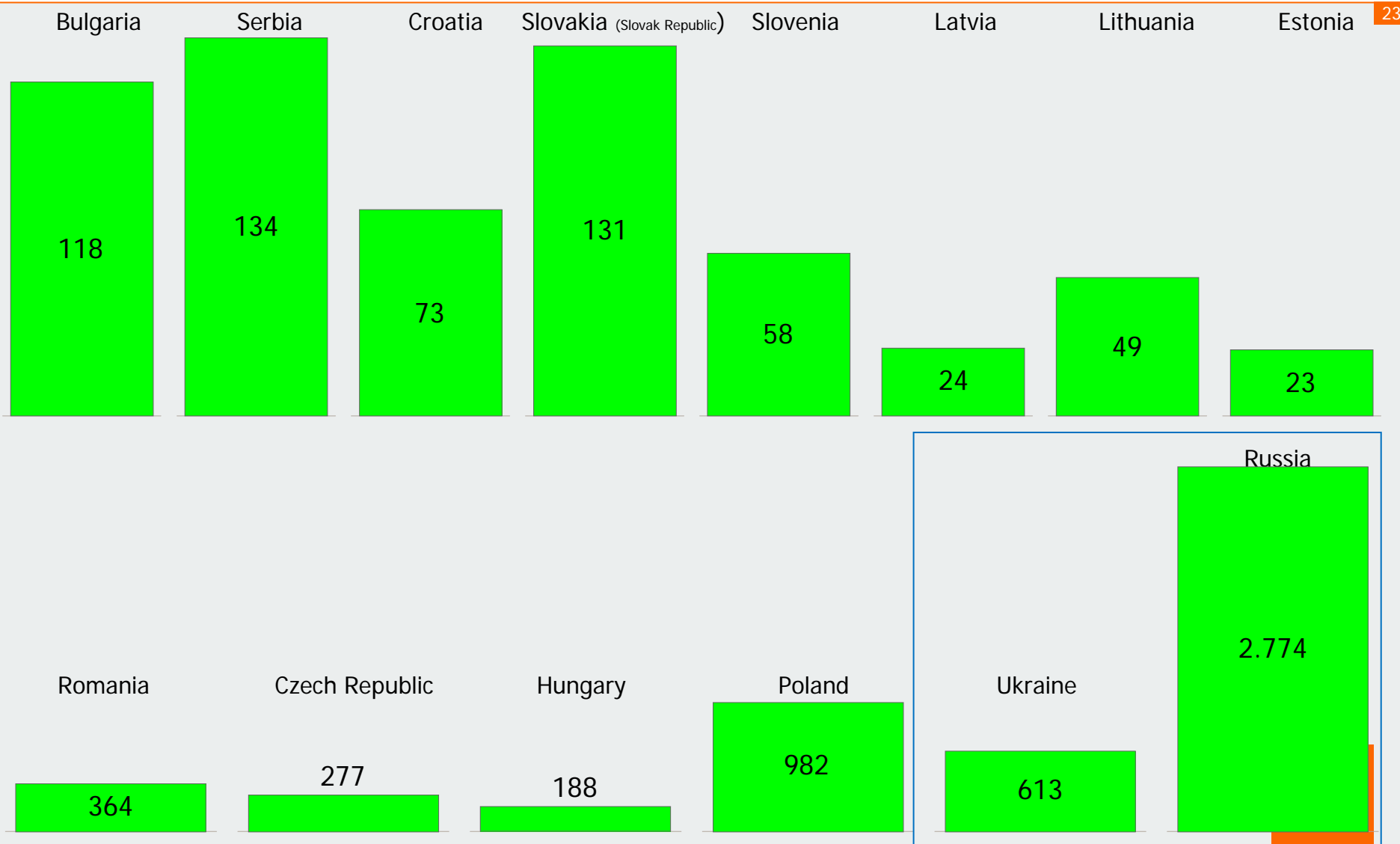
Washing Machines

WASHINGMACHINES

Sales Ths. Units

GfK Panelmarket

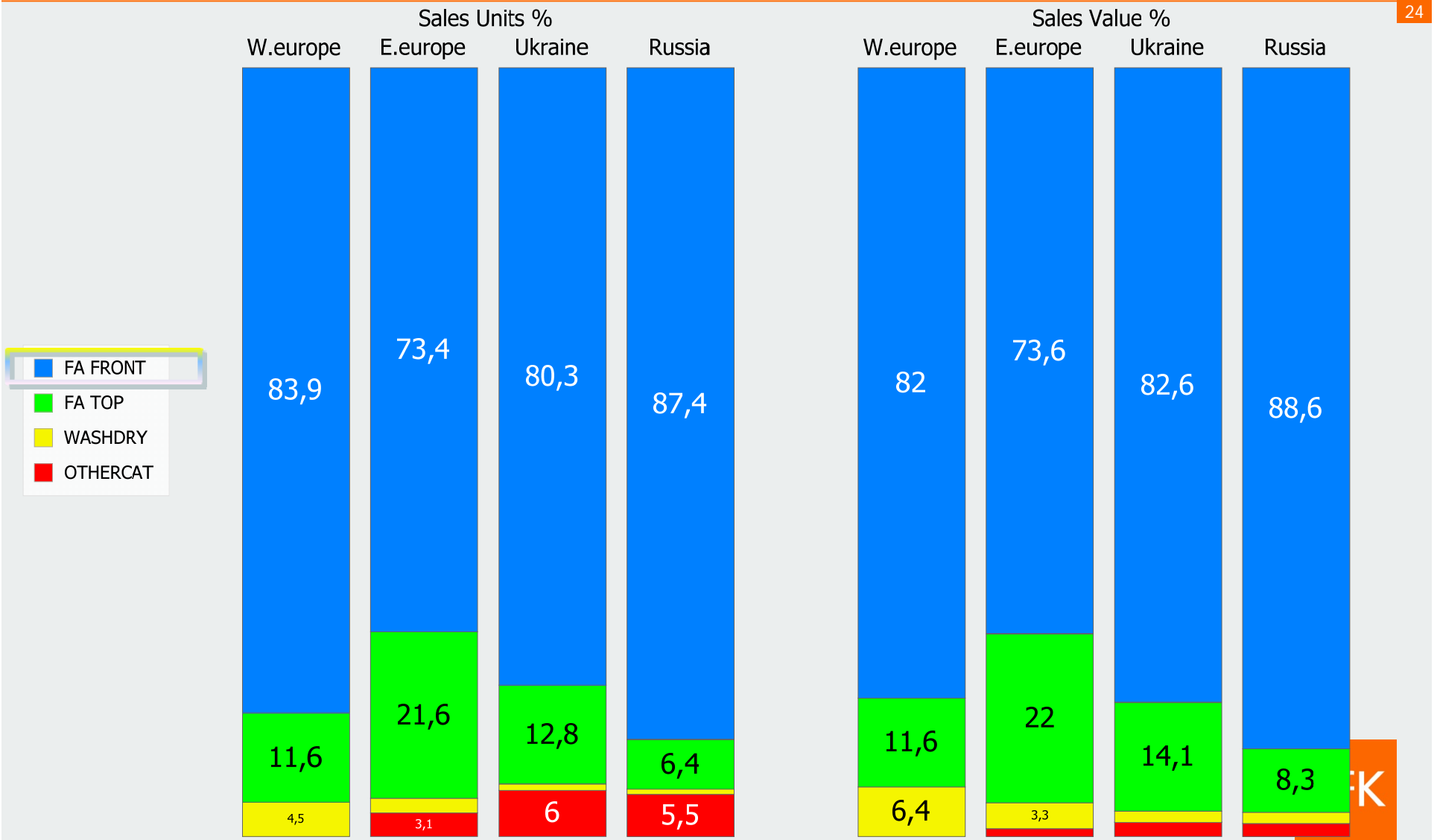
2010



WASHINGMACHINES

Sales Units %, Sales Value %
2010

GfK Panelmarket

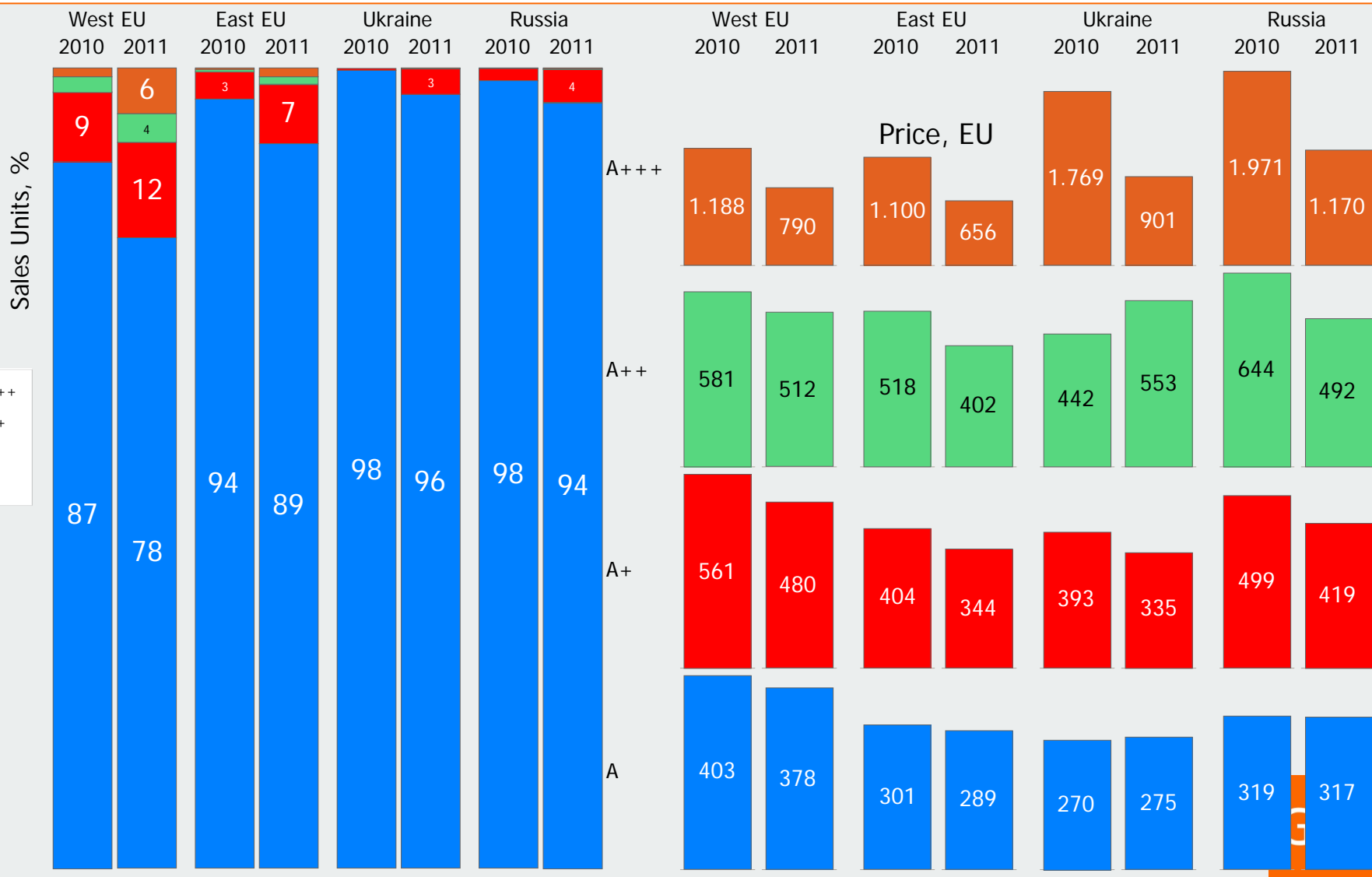


WASHINGMACHINES

GfK Panelmarket Data

Seasonally Adjusted 2011/2010

FA FRONT

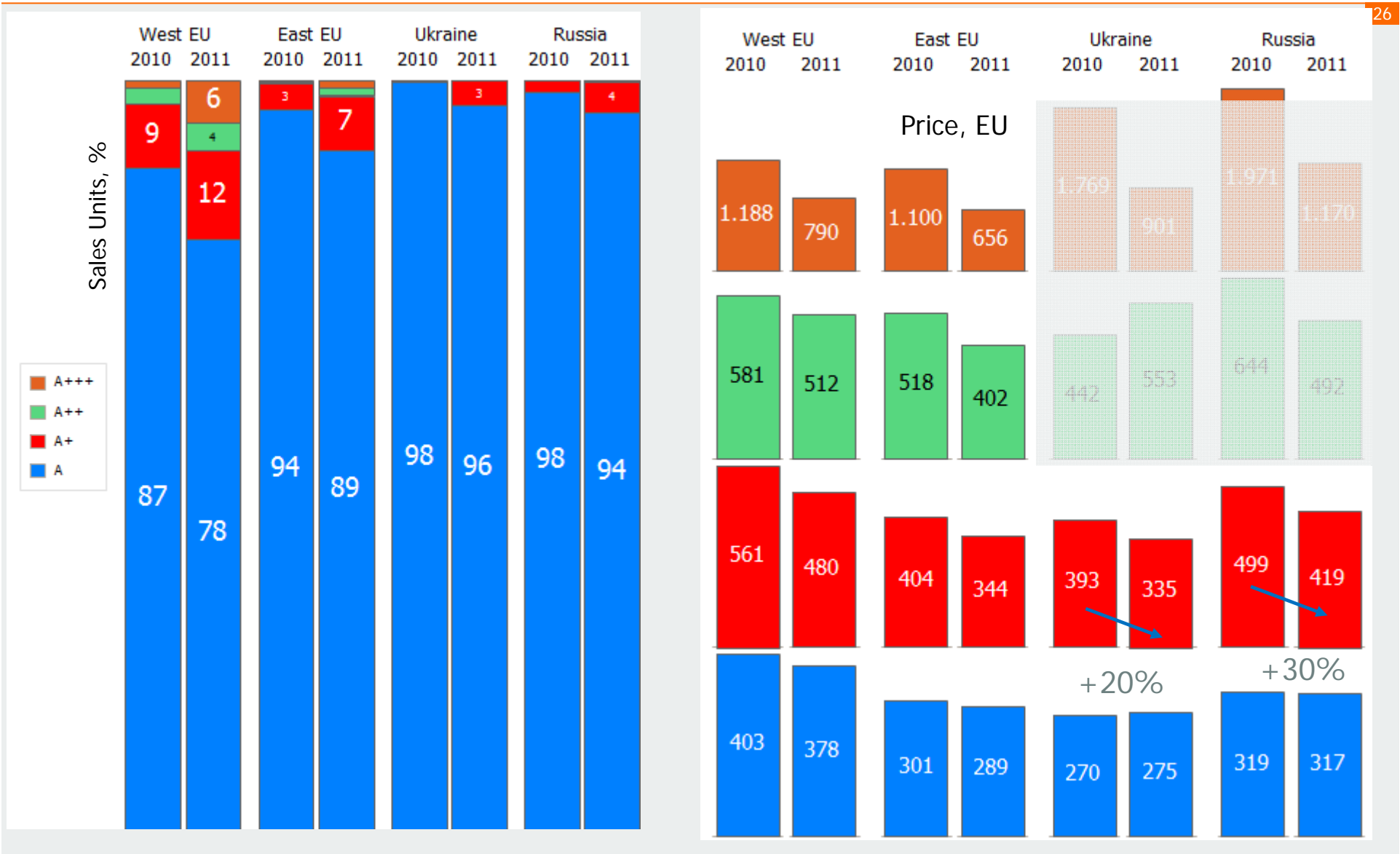


WASHINGMACHINES

Seasonally Adjusted 2011/2010

GfK Panelmarket Data

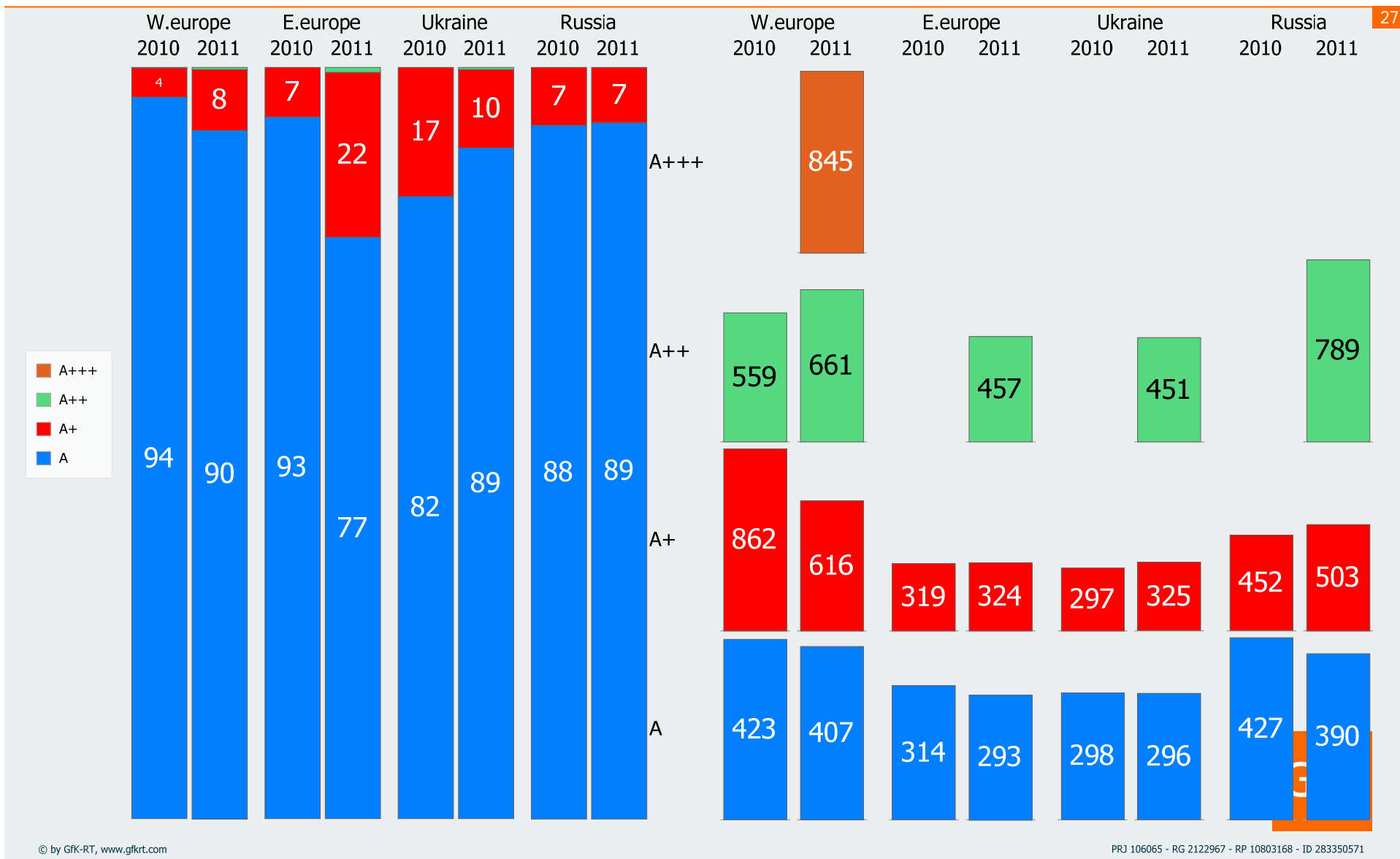
FA FRONT



WASHINGMACHINES

Sales Units %, Price EUR fix
2011

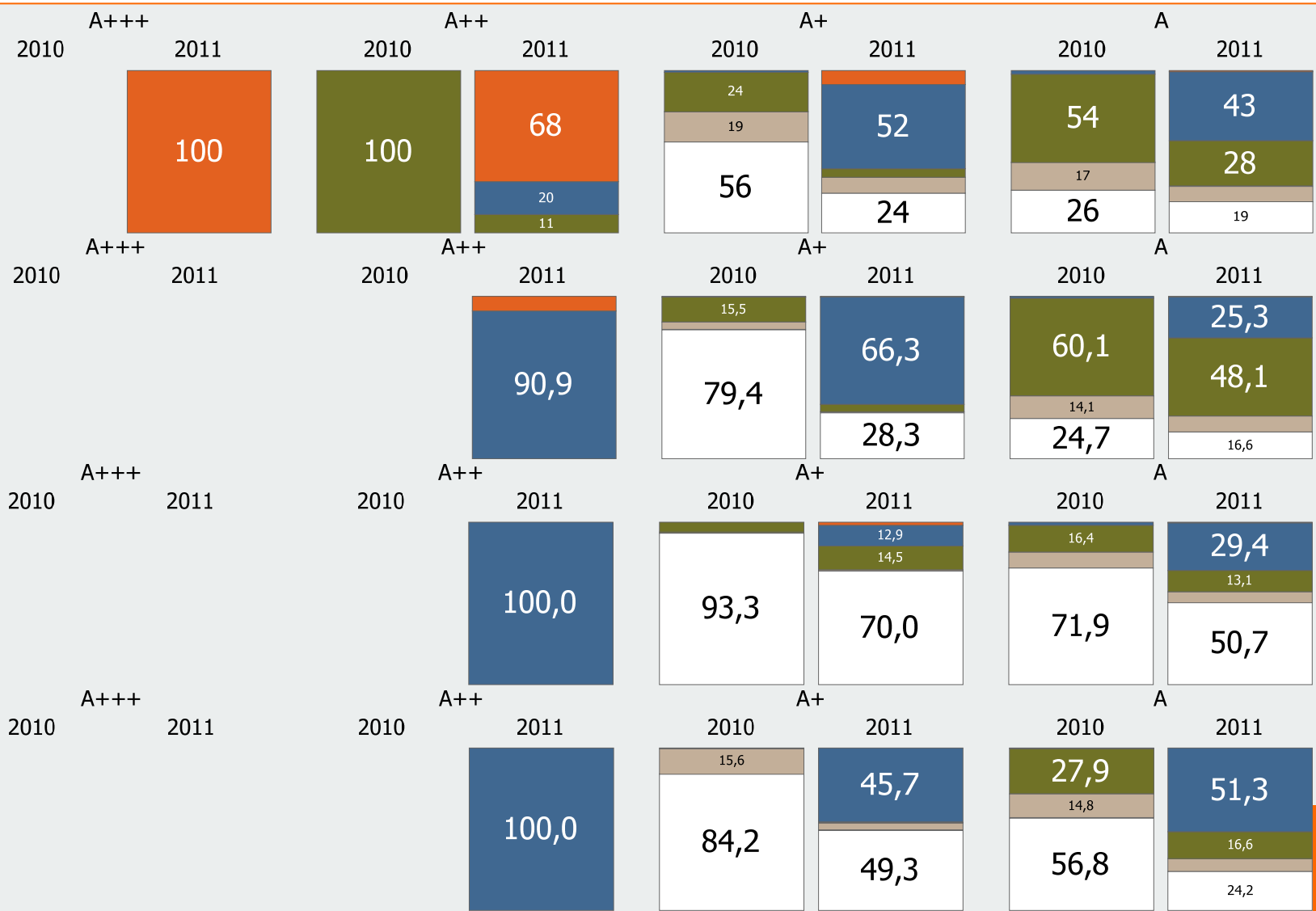
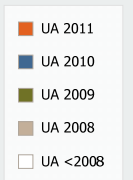
GfK Panelmarket
FA TOP



WASHINGMACHINES

Sales Units %
2011

GfK Panelmarket
FA TOP



WASHINGMACHINES

Sales Units %

Seasonally Adjusted 2011/2010

GfK Panelmarket

FA FRONT



The main trends on MDA markets focusing on energy efficiency Ukraine/Russia vs Western and Eastern Europe

30

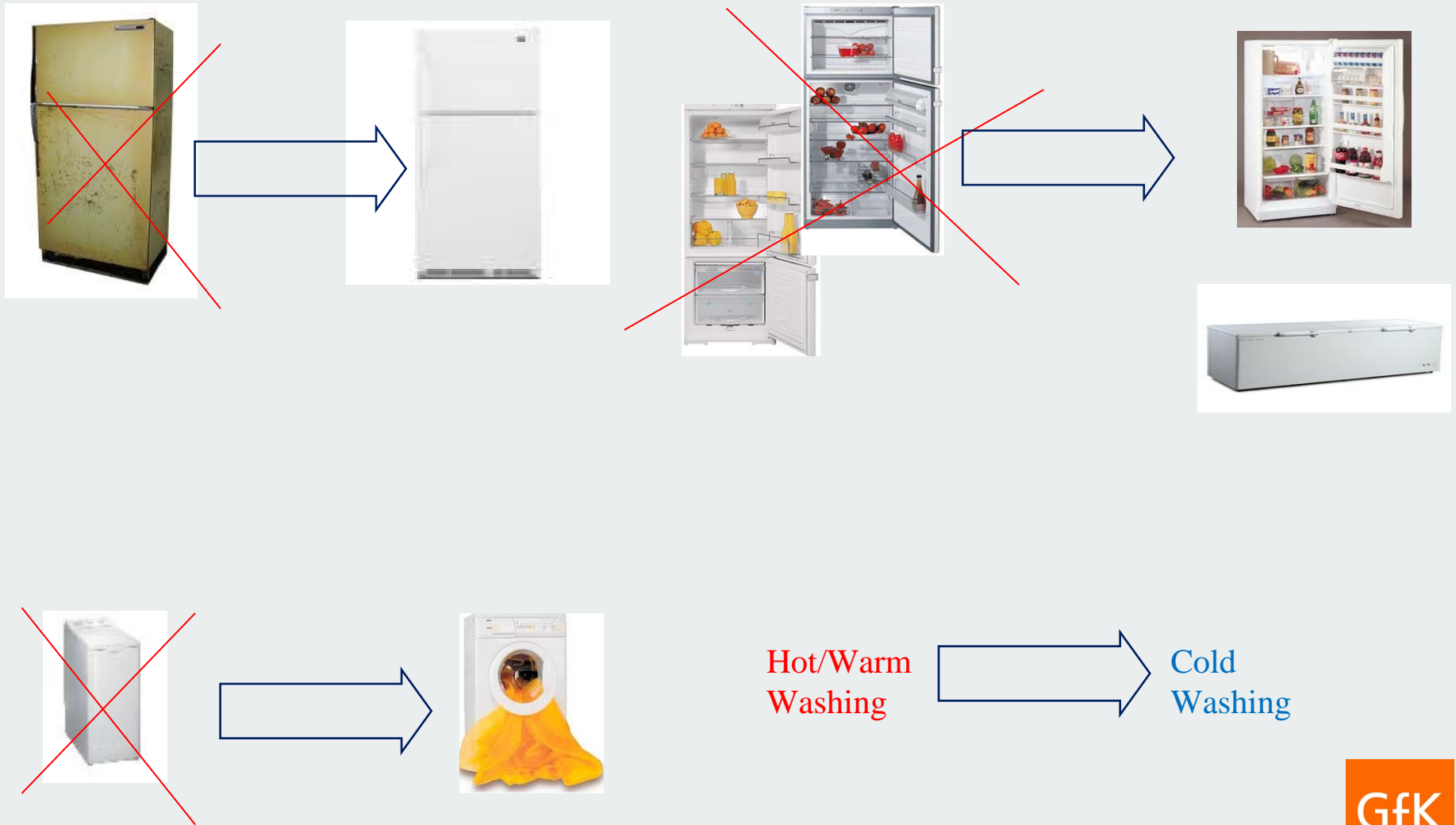
- **Ukrainian and Russian markets of major domestic appliance are recovering.**
- **These markets are one of the biggest in Eastern Europe.**
- **Trend on increase of energy efficiency of major domestic appliance is remarkable**

- **Refrigerators and Washing machines are one of the most energy consumable appliances at home. Decrease in energy losses can save money to consumers**

Producer's helpful price policy regarding energy efficiency can be additional stimulus in appliance substitution on more "friendly" one.

Information support can help consumers to choose more efficient home appliance

The more efficient appliance is, the more money you can save





THANK YOU

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• GfK. Growth from Knowledge

