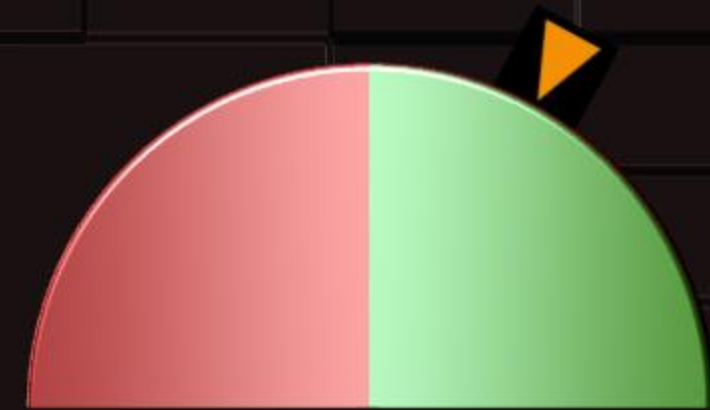


Dr. Reinhard C. Zinkann

**Member of ZVEI Board of Directors
Chairman ZVEI Large Domestic Electrical Appliances Division**

Major Domestic Appliances: growth rates Jan – June 2019 PY

Sales value local currency, GfK panel markets



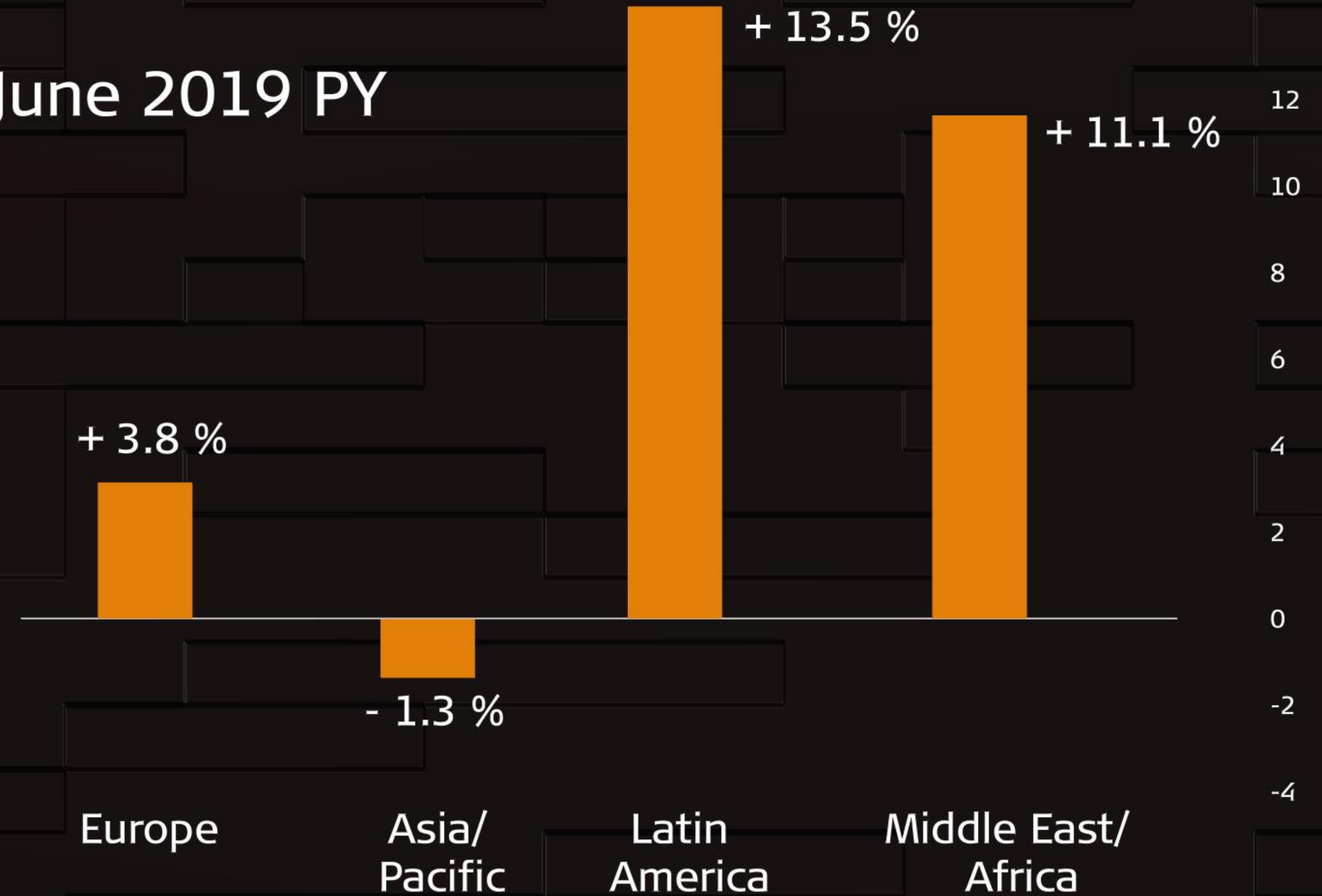
+ 2.7 %

Jan - June 2019

All GfK countries

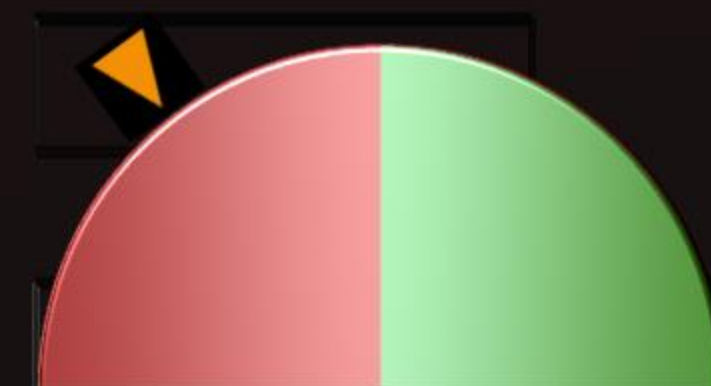
excl. North America

Built-In: - 1.8 %
Freestanding: + 3.9 %



Global MDA market – impact of China

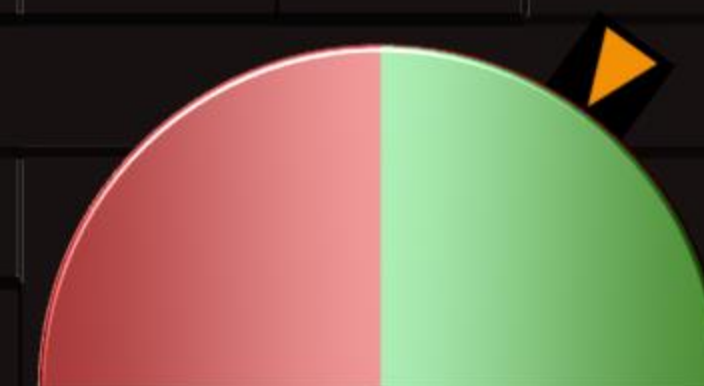
Sales value local currency, Jan - June 2019



- 6.5 %

Jan - June 2019

CHINA



+ 2.7 %

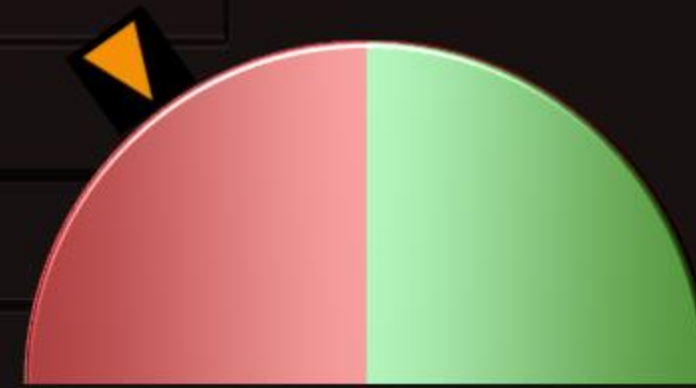
Jan - June 2019

All GfK countries
excl. North America

Built-In: - 1.8 %
Freestanding: + 3.9 %

Global MDA market – impact of China

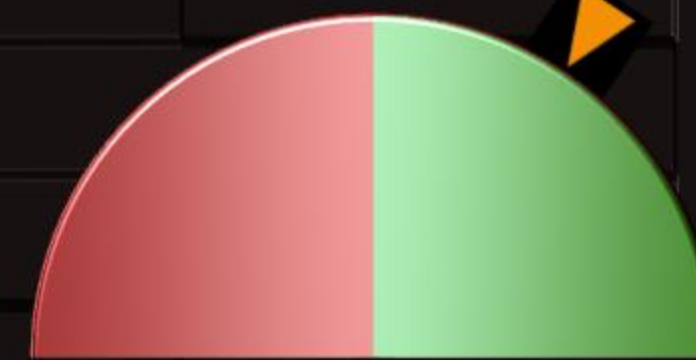
Sales value local currency, Jan - June 2019



Jan - June 2019

CHINA

- 6.5 %

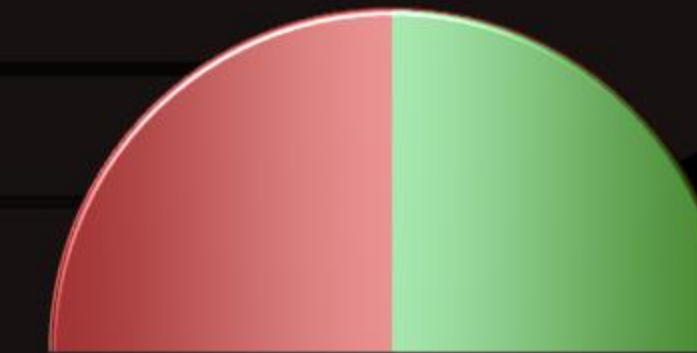


Jan - June 2019

All GfK countries
excl. North America

+ 2.7 %

Built-In: - 1.8 %
Freestanding: + 3.9 %



Jan - June 2019

All countries
excl. China

+ 6.2 %

Built-In: + 4.7 %
Freestanding: + 6.5 %

Key Themes of Major Domestic Appliances

Rich Experiences

delivered through



Performance

Growth in capacity,
but flattening in cooling

Innovations in cooking



Simplification

Smart Appliances

Multifunctional appliances



Premium

Built-In appliances

Low noise appliances,
hobs w. int. hoods,
3+Door refrigerators

MDA specific



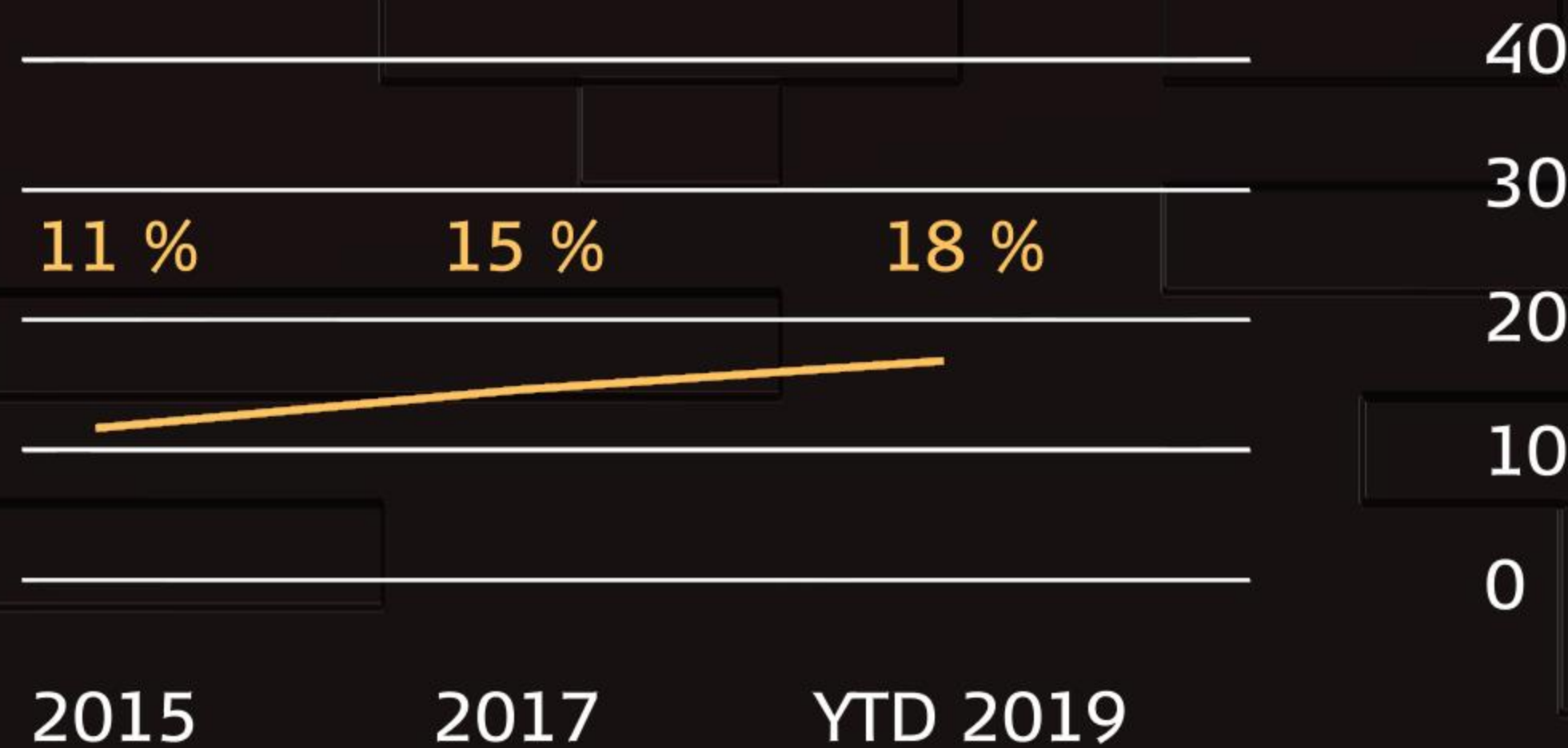
Sustainability

Energy and resources
efficiency

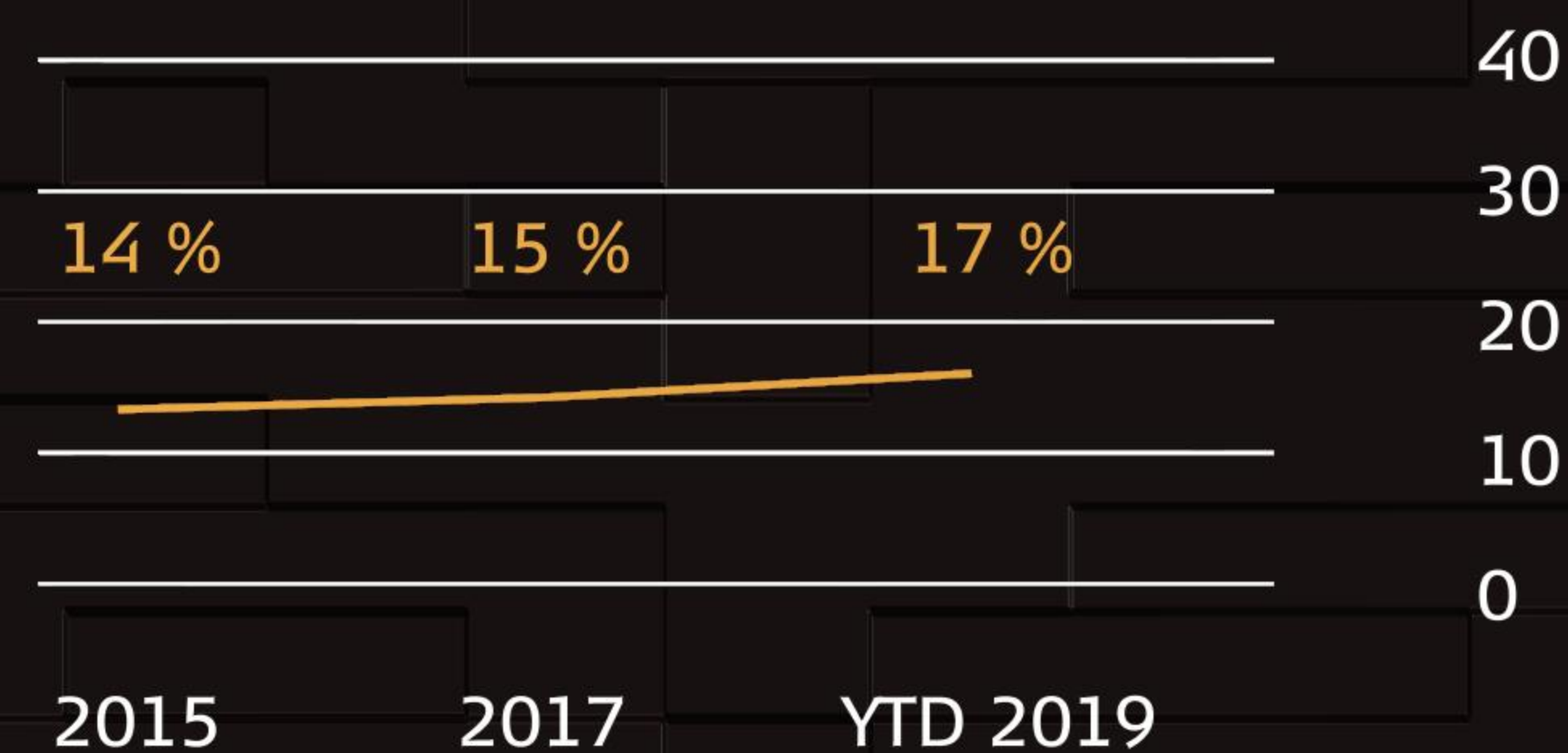
Ongoing: Multifunction in MDA – key driving segments

Panelmarket global (wo North America), %, value

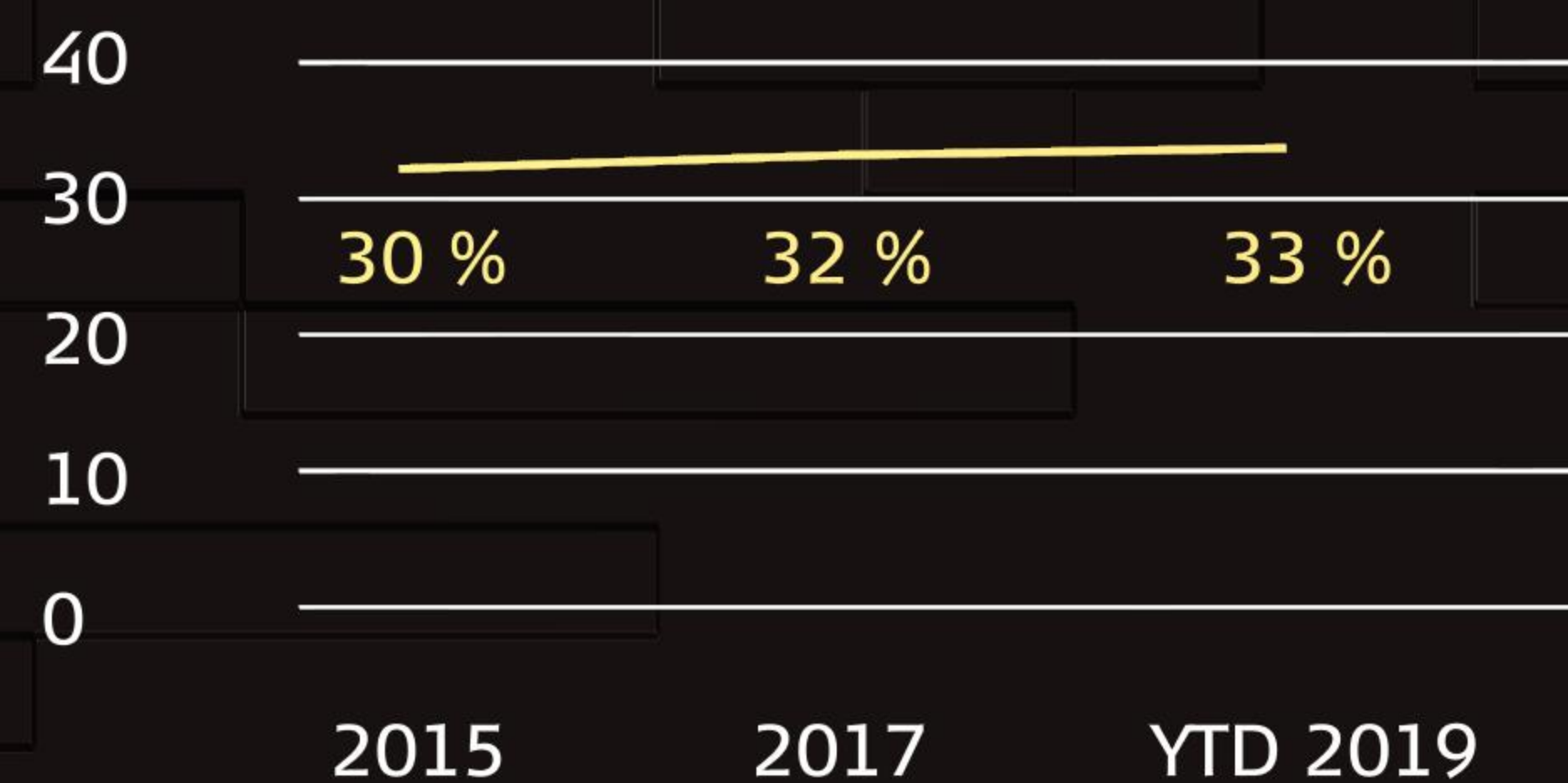
Wash & Dry Combi



Ovens combi



3+ Door fridge & freezer



Multifunction key segment: Hobs with integrated hoods, strong growth in Western Europe

Sales value, growth rate %, Jan - June 2019



+ 44 % (13 %)



+ 25 % (8 %)



+ 5 % (share 66%)



+ 38 % (3 %)



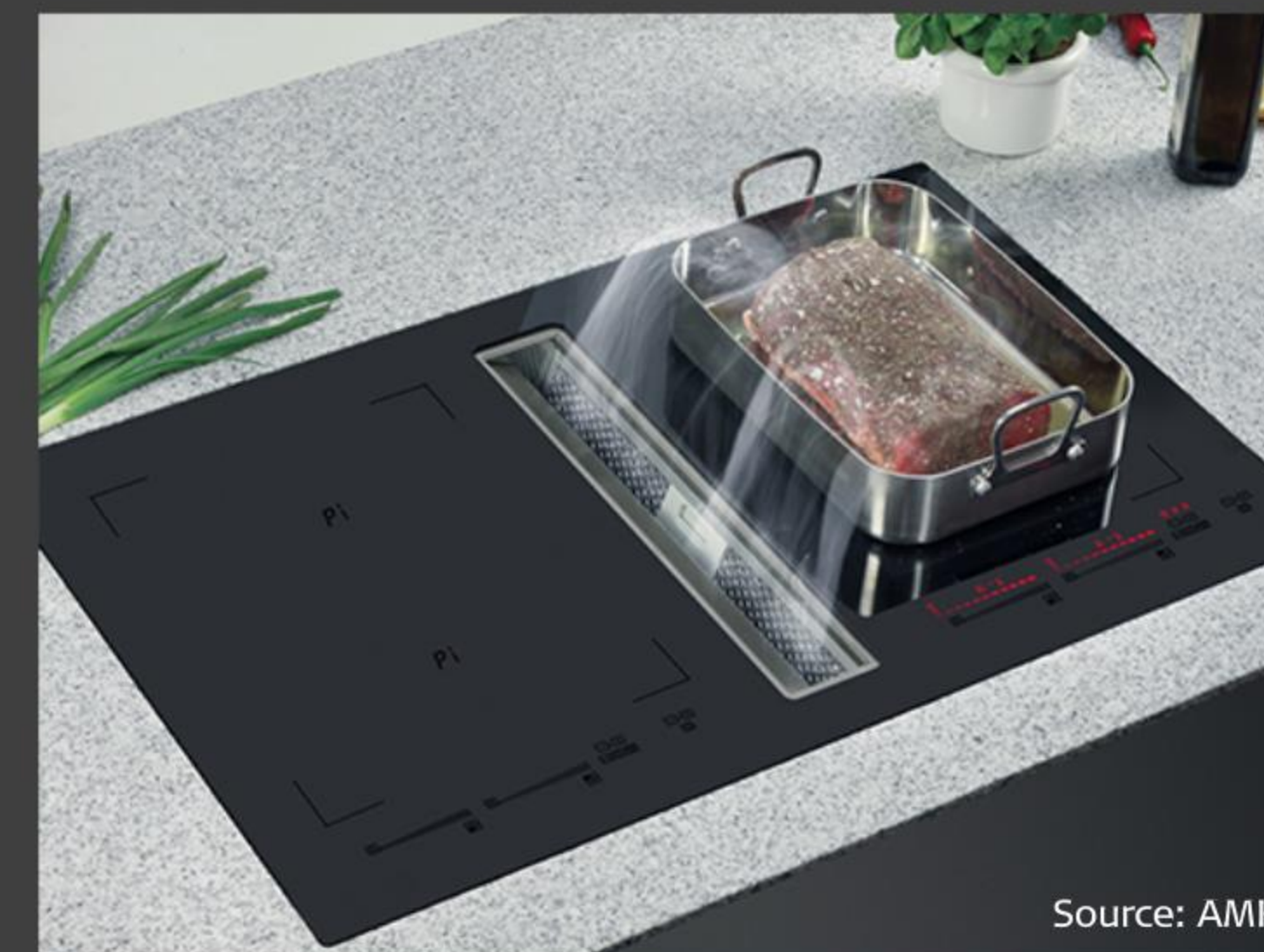
+ 100 % (5 %)



+ 44 % (2 %)



+ 100 % (3 %)

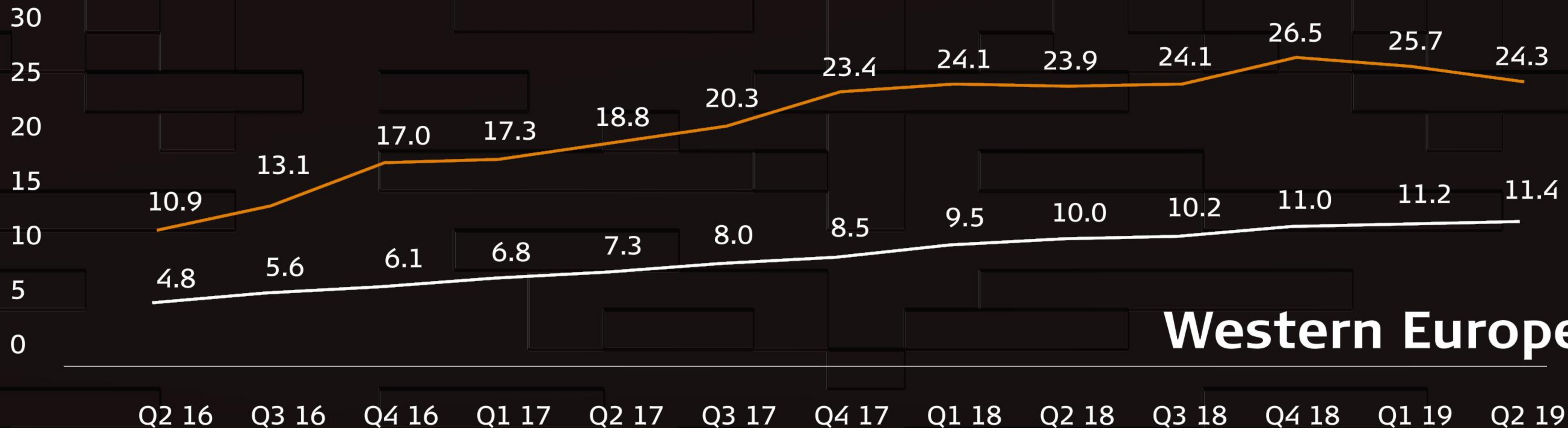


MDA connected - share of total MDA Market

(% sales value)

Asia/Pacific

Western Europe



Small Domestic Appliances: Key themes

Rich Experiences delivered through

SDA specific



Simplification

Simplify regular tasks
Smart
Voice assistants



Well - being

Compensating (urban) pollution
Air and water quality
Sleep



Premium

Aspirational products express
identity
Pamper the "Me"



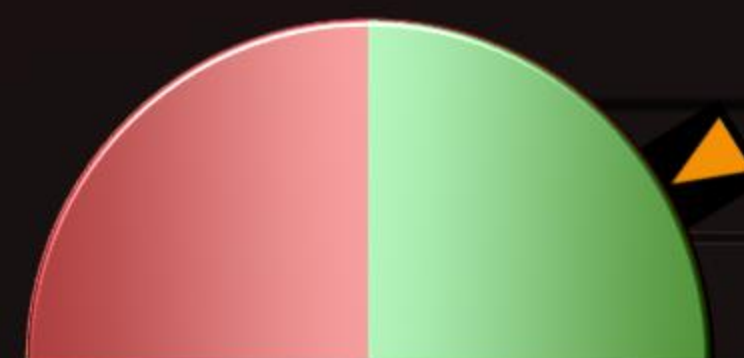
Performance

Rich experiences
high-end features

SMALL Domestic Appliances – Growth rates

Jan - June 2019 % PY

value local currency, GfK Panel markets, comparable product groups

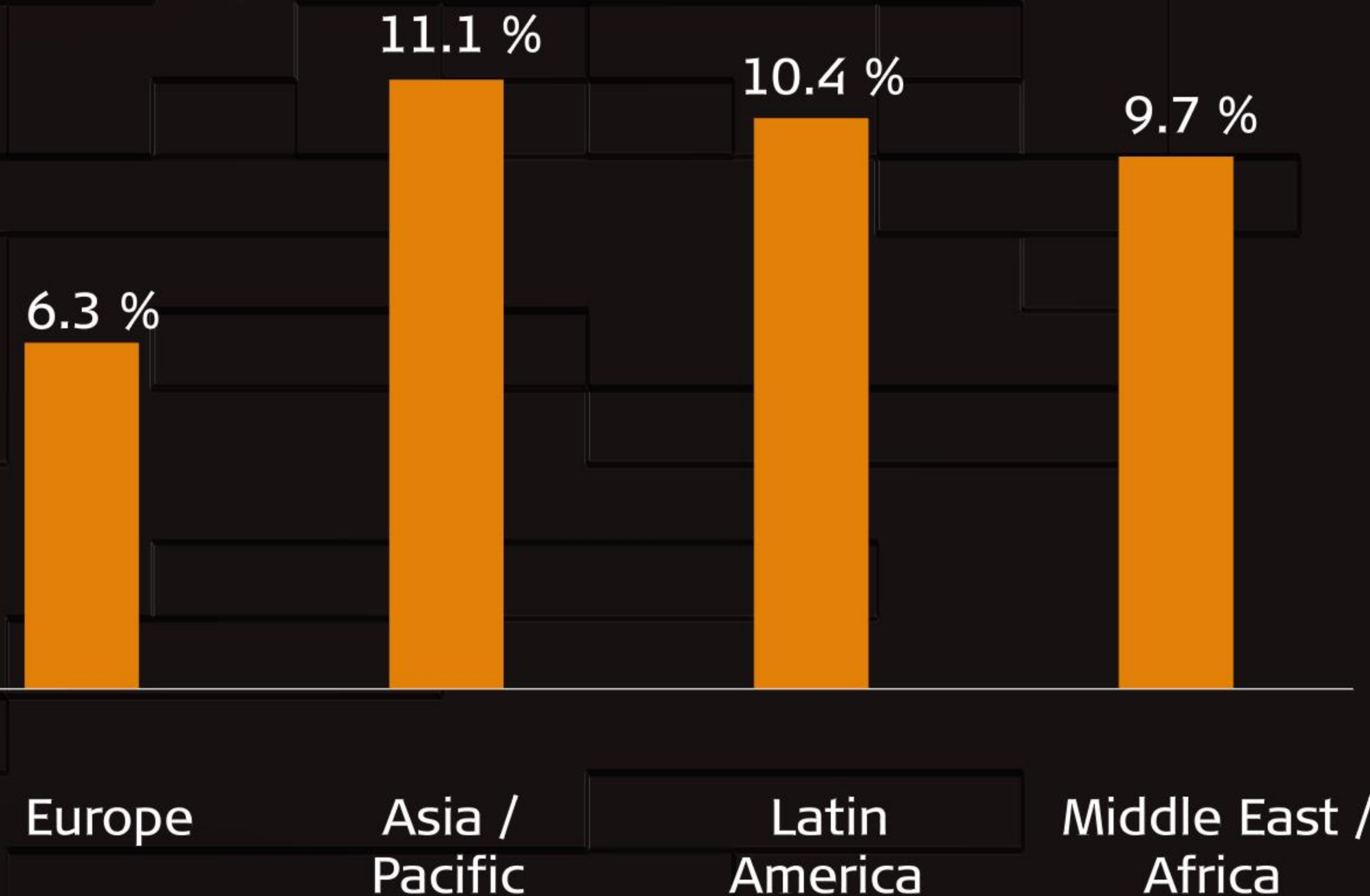


+ 8.8 %

Jan - June 2019

All GfK countries

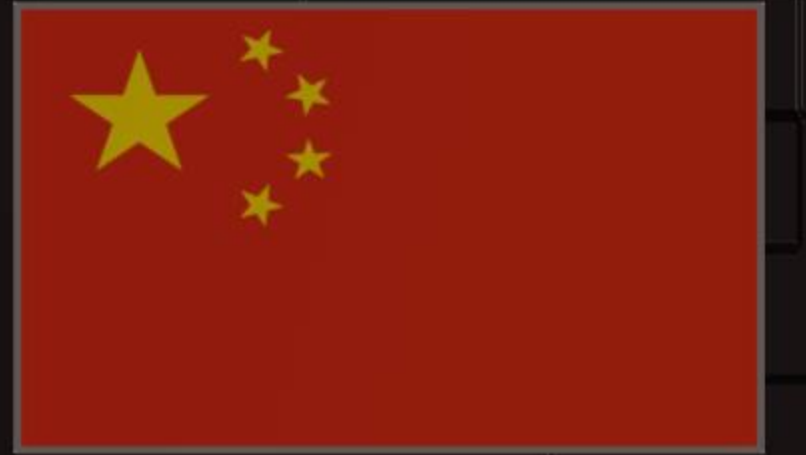
excl. North America



China: Small Domestic Appliances market sustains growth

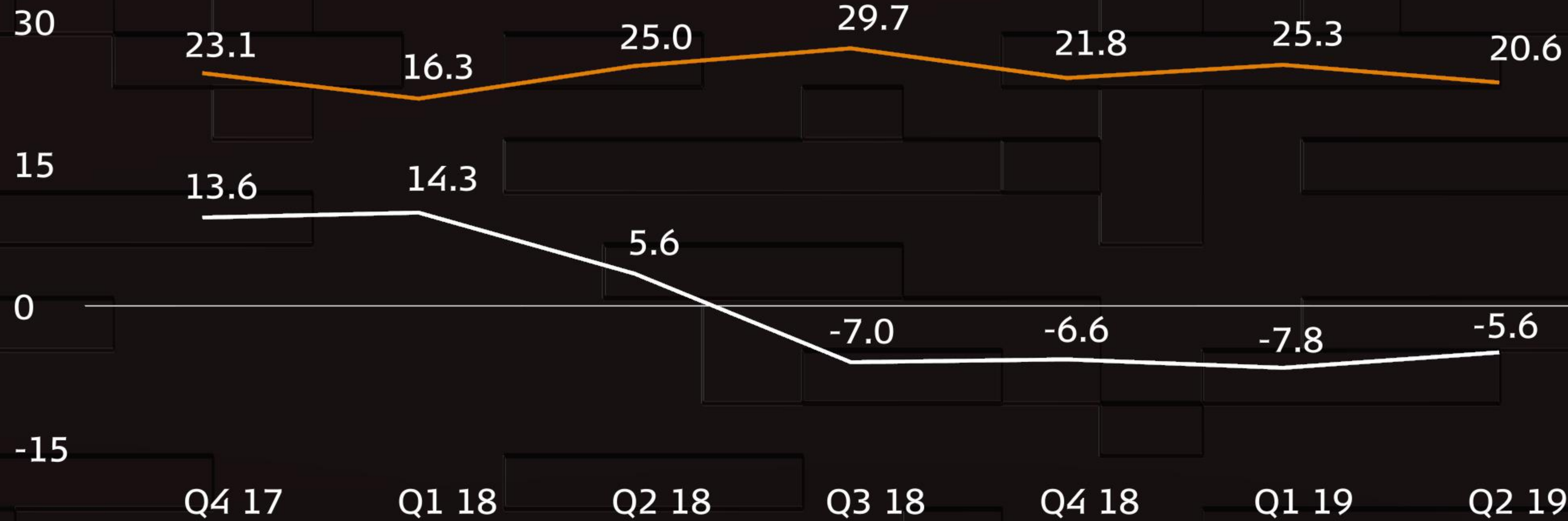
Growth rates % (sales units!)

China



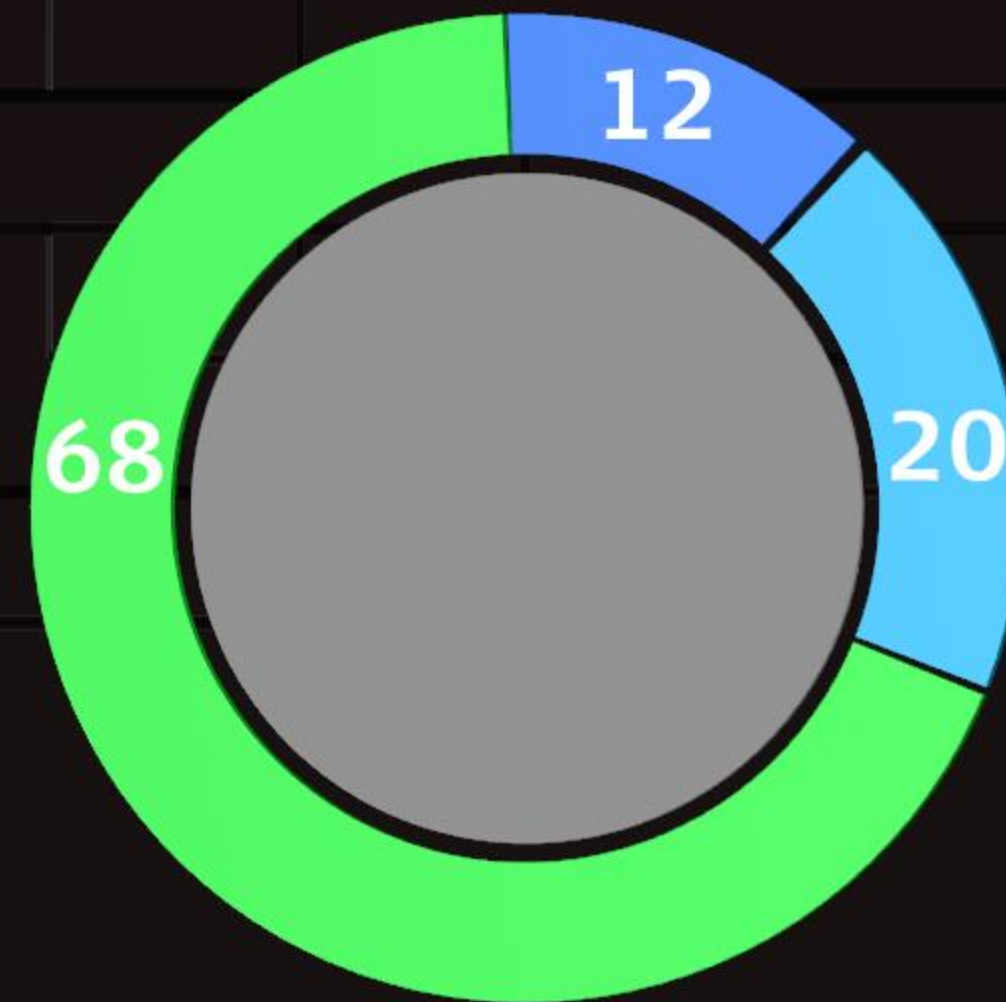
SDA

MDA



Small Domestic Appliances segments: shares and growth

Sales Values Share



- Personal Care
- Well - being
- Rest of SDA

Growth Rates



SDA Total



Personal Care



Well - being



All other SDA
(growth mainly due to VC and Espresso)

All other SDA Total include all GfK tracking countries and all comparable SDA Products
Personal Care category: Hair Dryer, Hair Styler , Hair Clipper, Dental Care
Well-being: Food Preparation, Juicers/Presses, El. Cooking Pots, Hot Air Fryers, Air Treatment

Handstick Rechargeable is now the dominant vacuum cleaner segment.
Robotic Vacuum cleaner segment is growing strongly.

Convenience seems to be the driving factor

Key Vacuum Cleaner Segments



877

+ 18 %



1,496

- 10 %



2,266

+ 27 %

0 500 1000 1500 2000 2500

Jan - June 2019; Sales Values Mio Euro fix

73 %

of Robots are **Smart** of which
nearly 80 % App-controlled.

Espresso Full Automatic continues to be the dominant segment. Comeback of Pump Traditional

Espresso
Pump Trad.

158

+ 26 %

■ Espresso FA is particularly strong
in FR, ES, DE, PL, CZ

Portioned
Coffee

426

- 1 %

■ Key Convenience features

Espresso
FA

758

+ 18 %

■ One touch

■ Integrated Coffee Grinder

0 200 400 600 800

■ Sales Values Mio Euro fix