

A person wearing a white lab coat is holding a blue globe of the Earth. The globe is the central focus, showing the continents in a darker blue. The person's hands are visible, gripping the globe from the sides. The background is a soft, out-of-focus white, suggesting a clean, professional environment.

"Latest Trends in Major Domestic Appliances in CEE"
Focus on energy consumption

Ms.Natalia Morzhova
Retail and Technology dept.
GfK RUS

GfK

GfK Methodology and Mission

2

Data shown in the charts refers to sell out at the retailer level.

GfK is auditing continuously the sell out of shops in all Western and Eastern European countries.

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.

Monitored Countries

4

Central EU	Croatia (HR)	Slovenia (SI)		
	Czech Republic (CZ)	Slovakia (SK)		
	Poland (PL)	Hungary (HU)		
	Romania (RO)	Bulgaria (BG)		
Baltics	Estonia (EE)	Lithuania (LT)		
	Latvia (LV)			
East EU	Russia (RU)	Ukraine (UA)		

APPLIANCES object of the report

5

**T
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M
D
A**

- **Washing Machines**
- **Tumble Dryers**
- **Dishwashers**
- **Refrigerators**
- **Freezers**
- **Free Standing Cookers**
- **Built In Ovens**
- **Hobs**
- **Hoods**

FOCUS ON

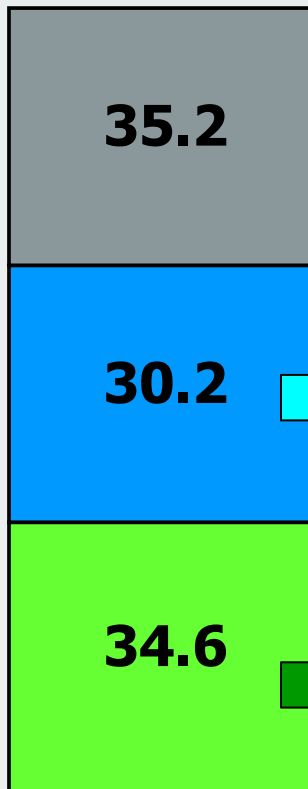


Importance of Appliances object of the report

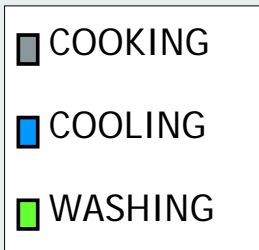
8 Countries Central Europe, Russia, Ukraine (2009)

6

Sales Units %



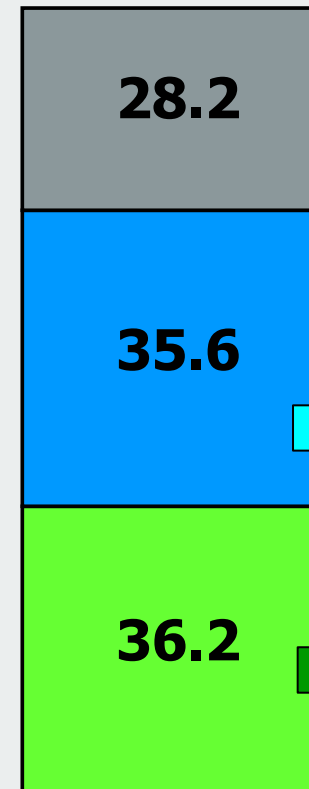
16 Mio



Refrigerators
26,8%

Washing
Machines
28,4%

Sales Value %



4.884,5 Mio €

Refrigerators
32,3%

Washing
Machines
27,7%

WASHING MACHINES
CENTRAL EASTERN EUROPEAN COUNTRIES
Year 2009

WASHING MACHINES

Sales Ths. Units

Year 2009

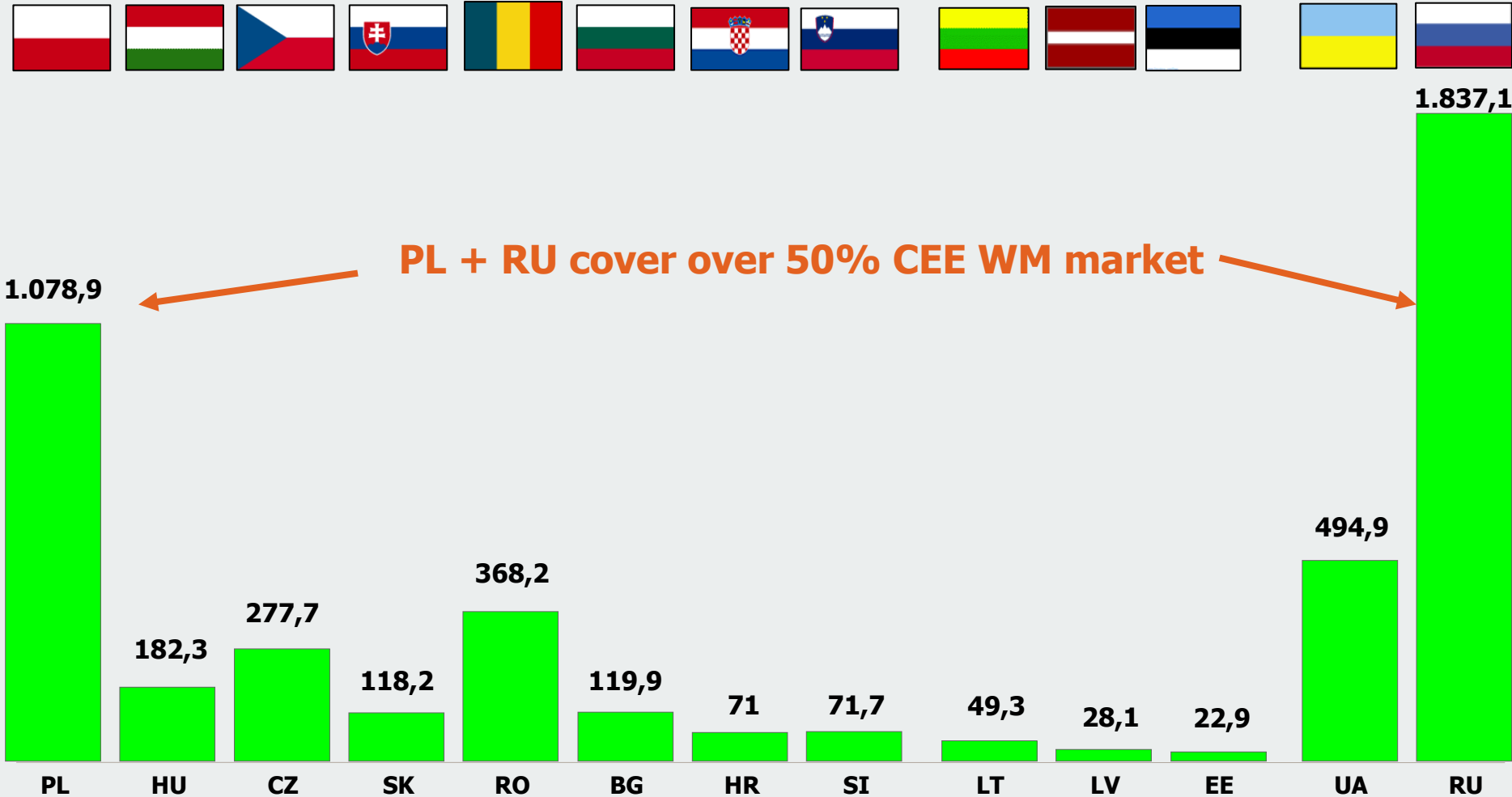
GfK Panelmarket Europe

Central EU

Baltics

East EU

8

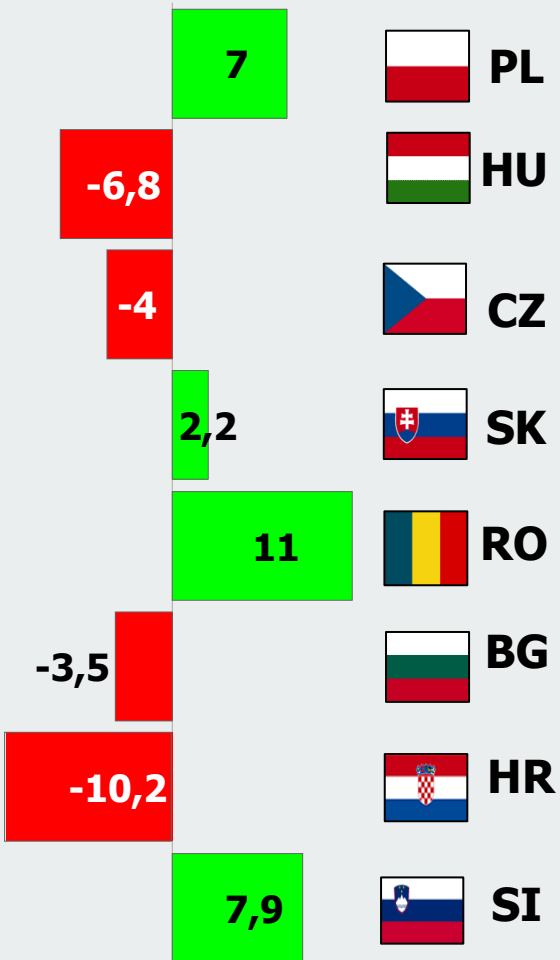


WASHING MACHINES

Trend over the last 2 years

Sales Units Growth Rate vs previous year, %

2008 vs 2007



WASHING MACHINES

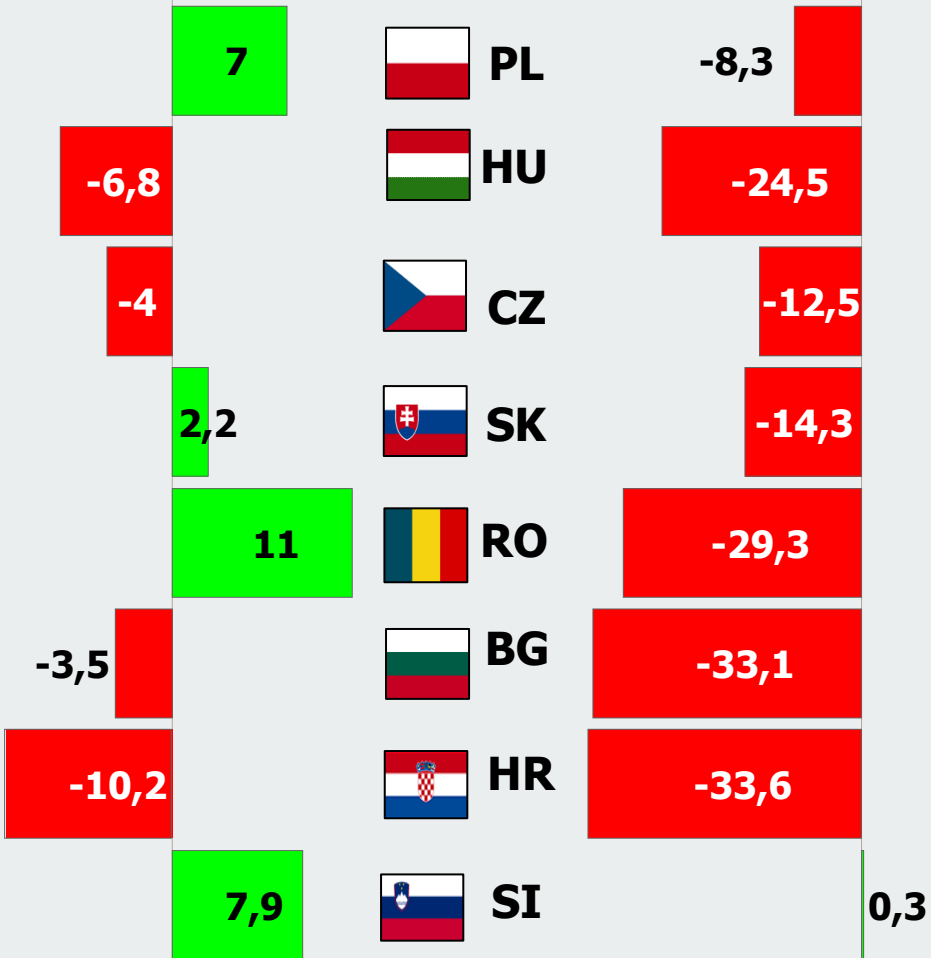
Trend over the last 2 years

Sales Units Growth Rate vs previous year, %

10

2008 vs 2007

2009 vs 2008



WASHING MACHINES

Trend over the last 2 years

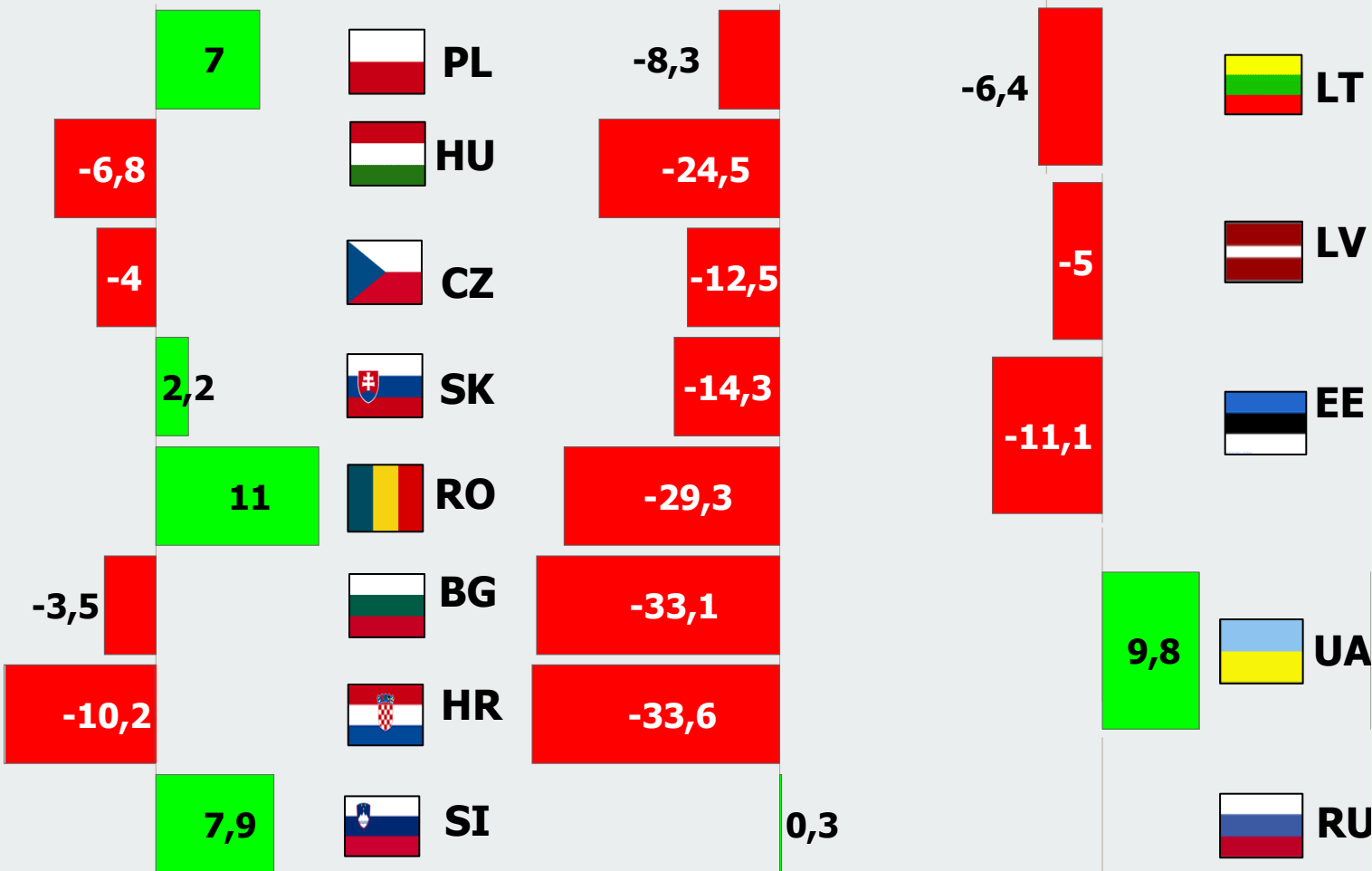
Sales Units Growth Rate vs previous year, %

11

2008 vs 2007

2009 vs 2008

2008 vs 2007



WASHING MACHINES

Trend over the last 2 years

Sales Units Growth Rate vs previous year, %

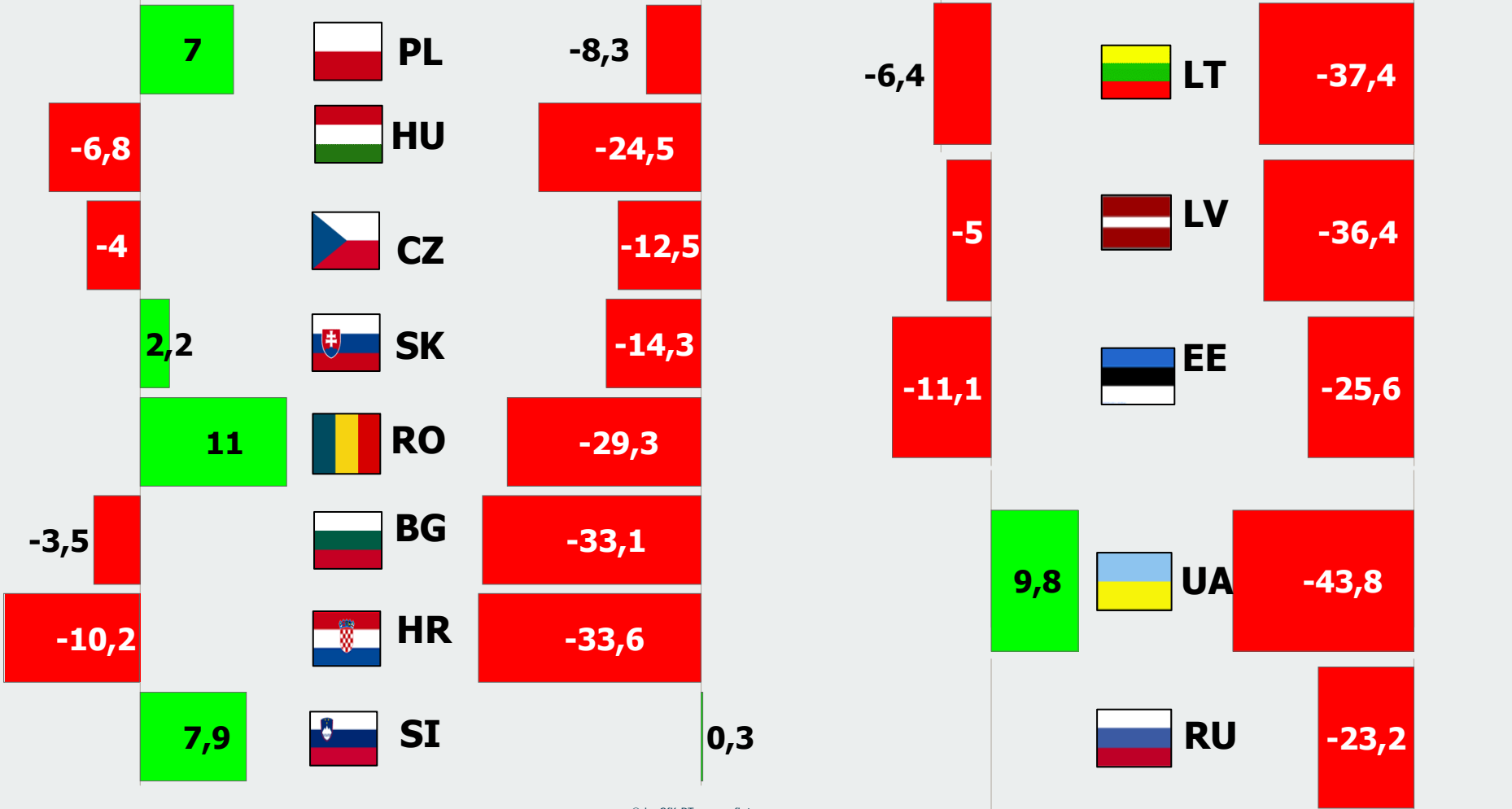
12

2008 vs 2007

2009 vs 2008

2008 vs 2007

2009 vs 2008



MDA Total 9

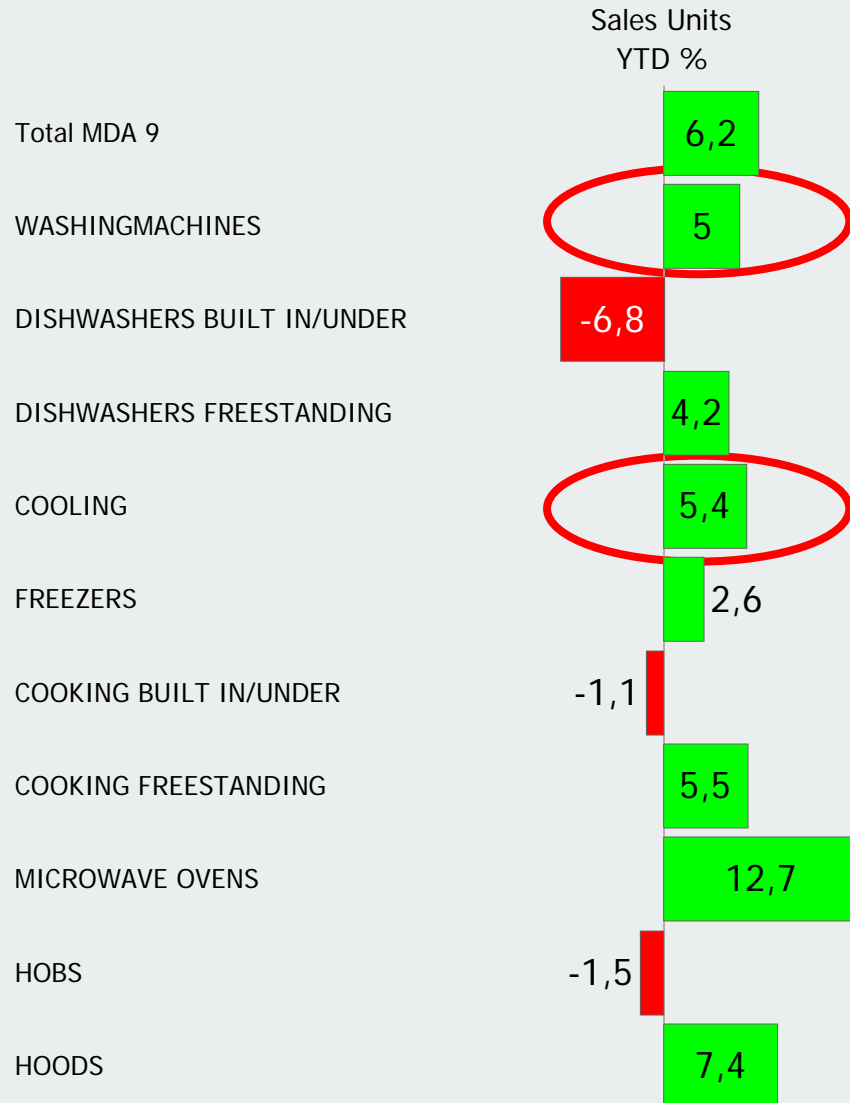
GROWTH RATES

Jan-June 2010 vs. Jan-June 2009

Russia Panelmarket

GfK

13



- MDA RU market is recovering
- Freestanding products are driving the trend
- BI market will also move to positive trend after "postponed" demand is back

WASHING MACHINES

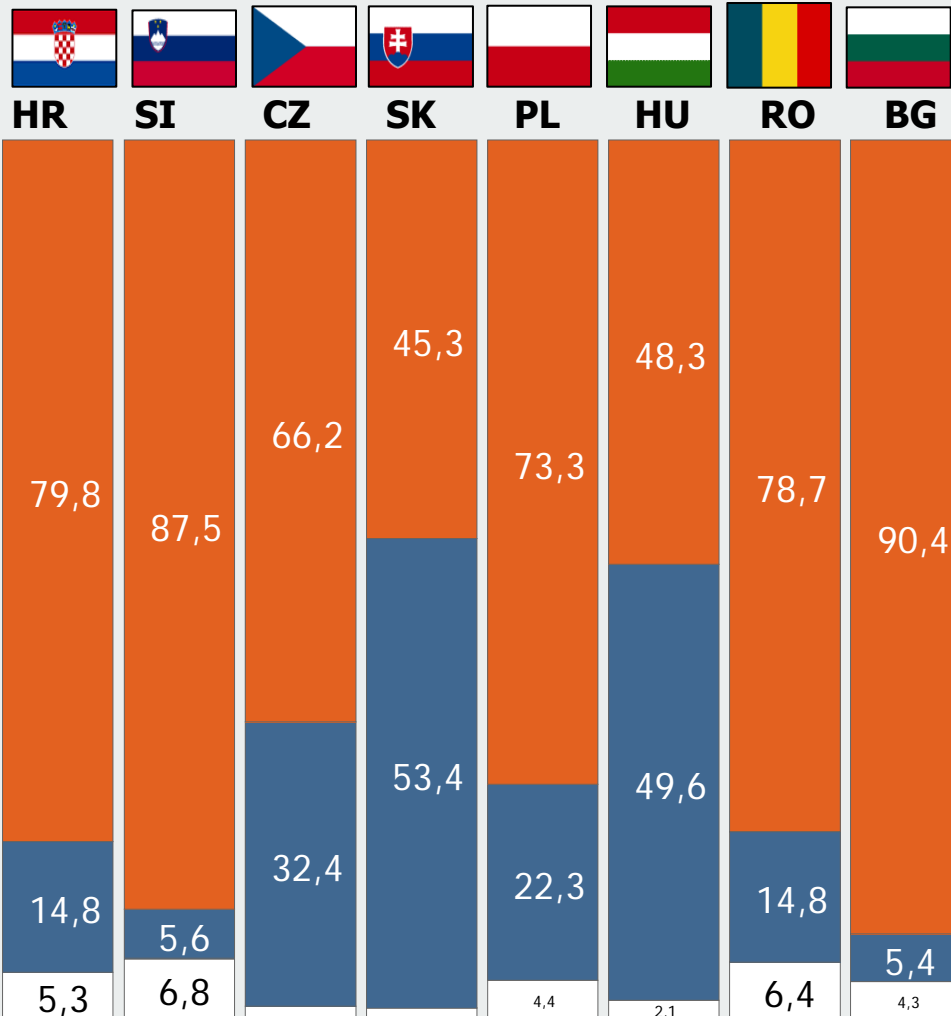
Sales Units %

Year 2009

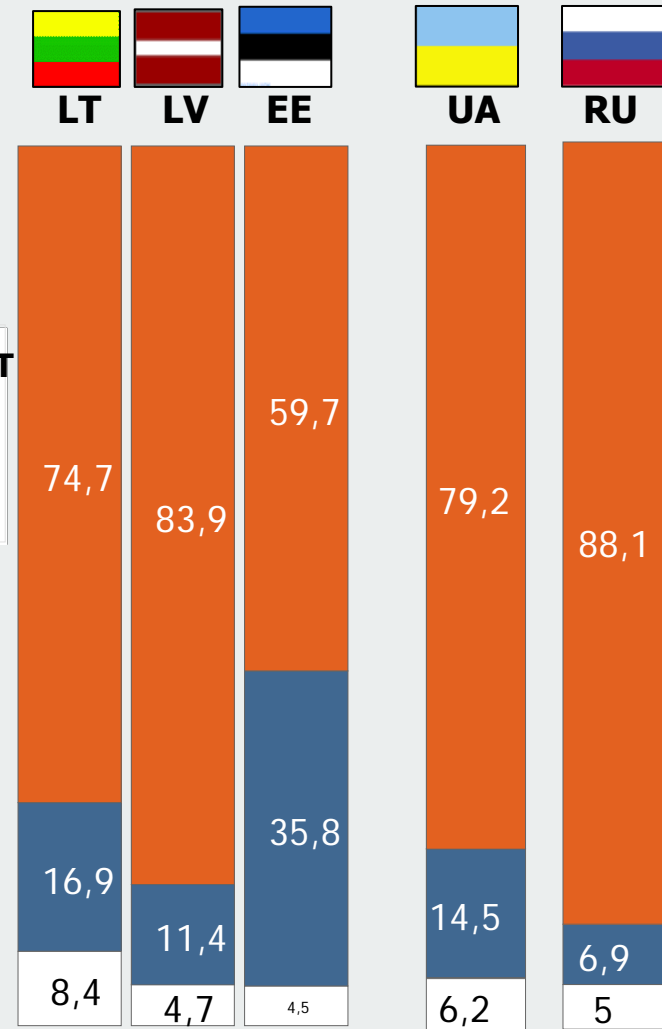
Importance of the 2 segments

Central EU and Baltics

Central EU



Baltics



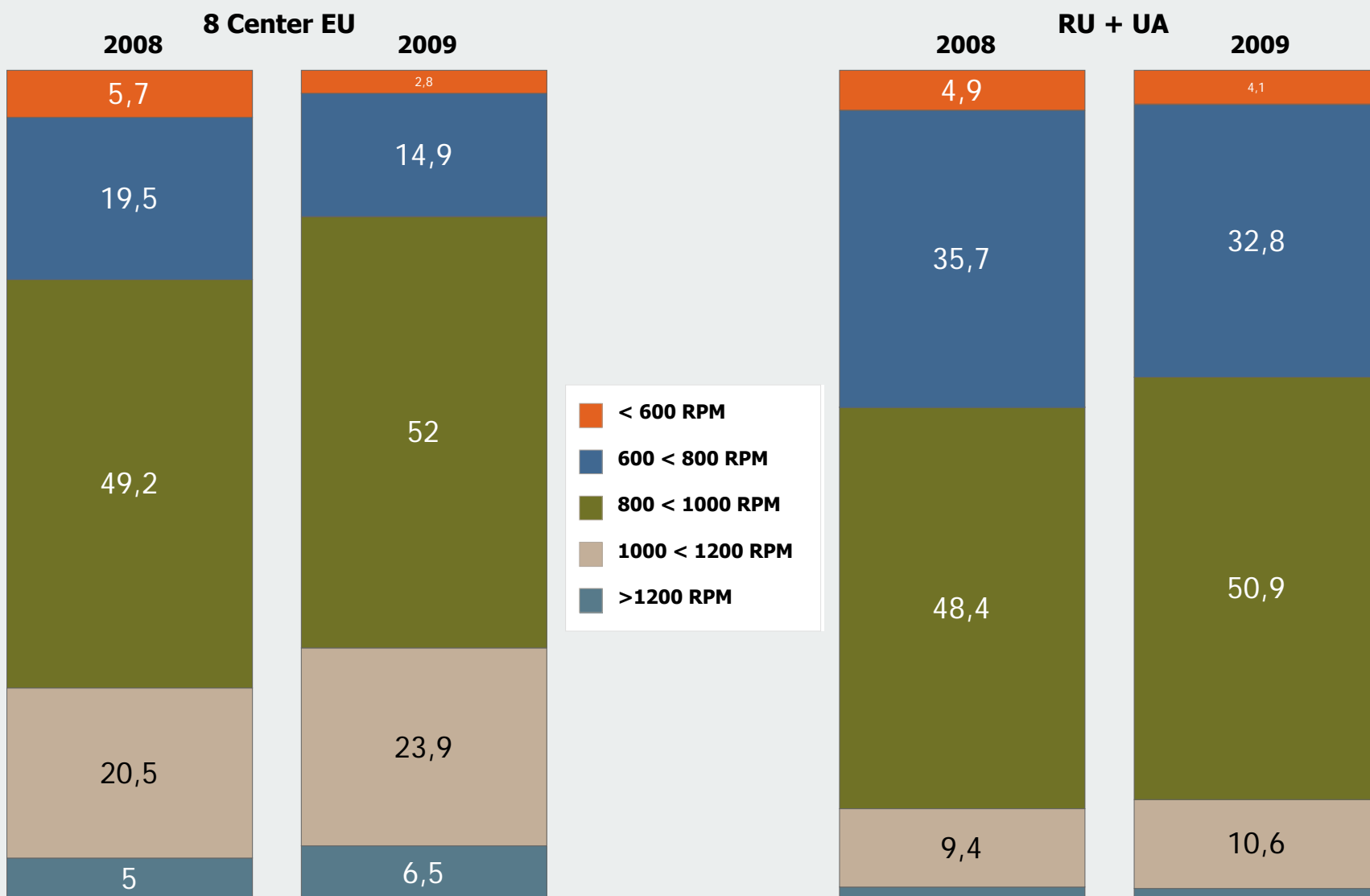
■ FA FRONT
■ FA TOP
■ Others

WASHING MACHINES

Sales Units %
Year 2009

FRONTLOADING

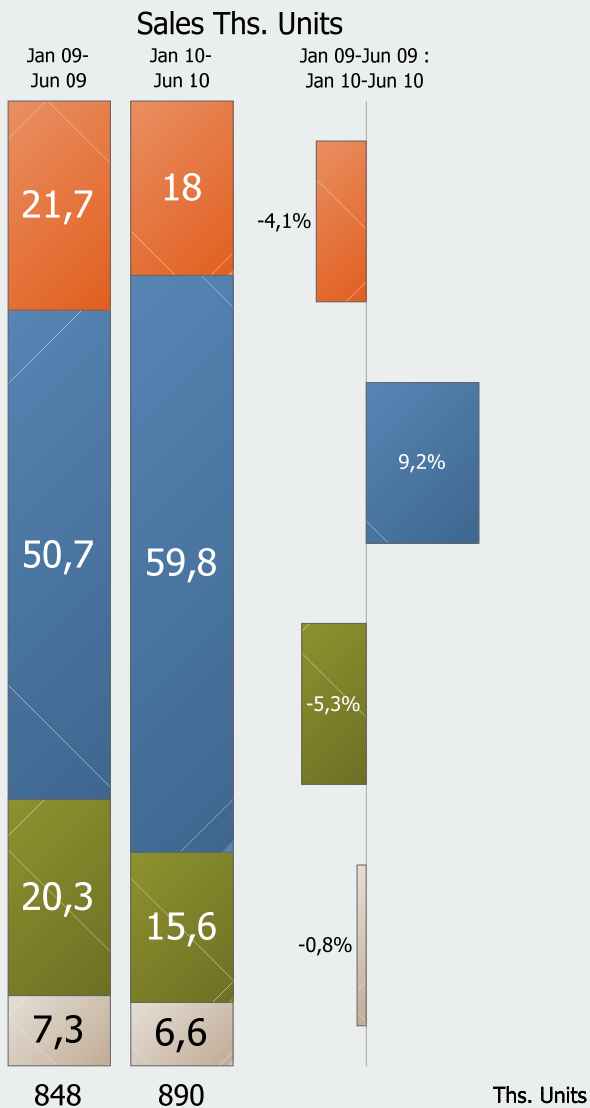
Spin Speed



WASHINGMACHINES

Main Types Shares and Growth
Jan 10-Jun 10

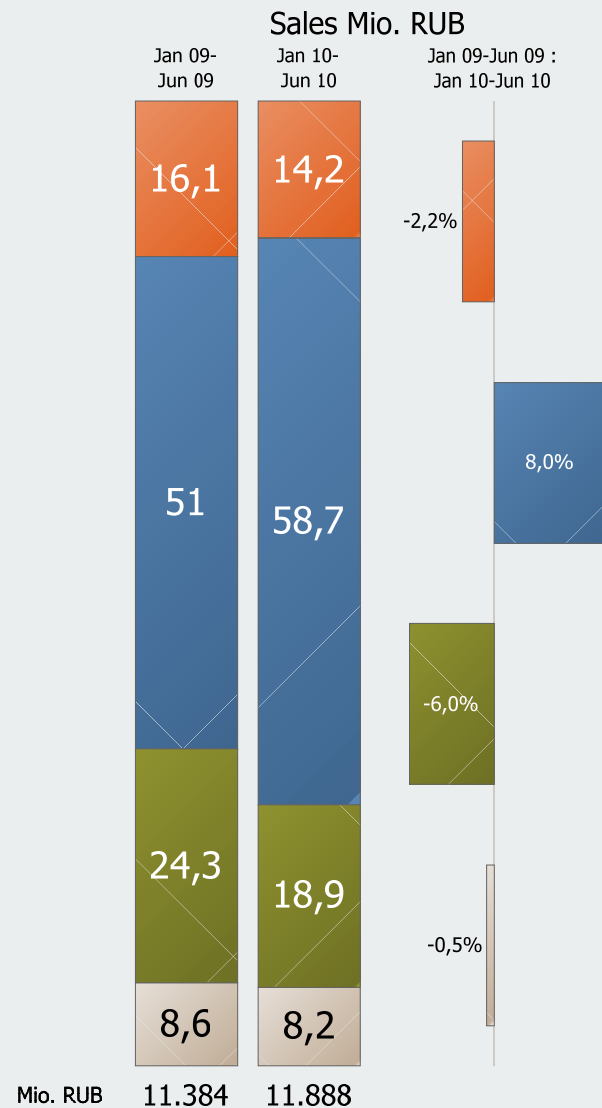
Russia Panelmarket
FULLAUTOMATIC



**+5 %
Total Un.
growth**

- FRONTLOADING <= 35 cm deep
- FRONTLOADING > 35 <= 45 cm deep
- FRONTLOADING > 45 cm deep
- TOPLOADING

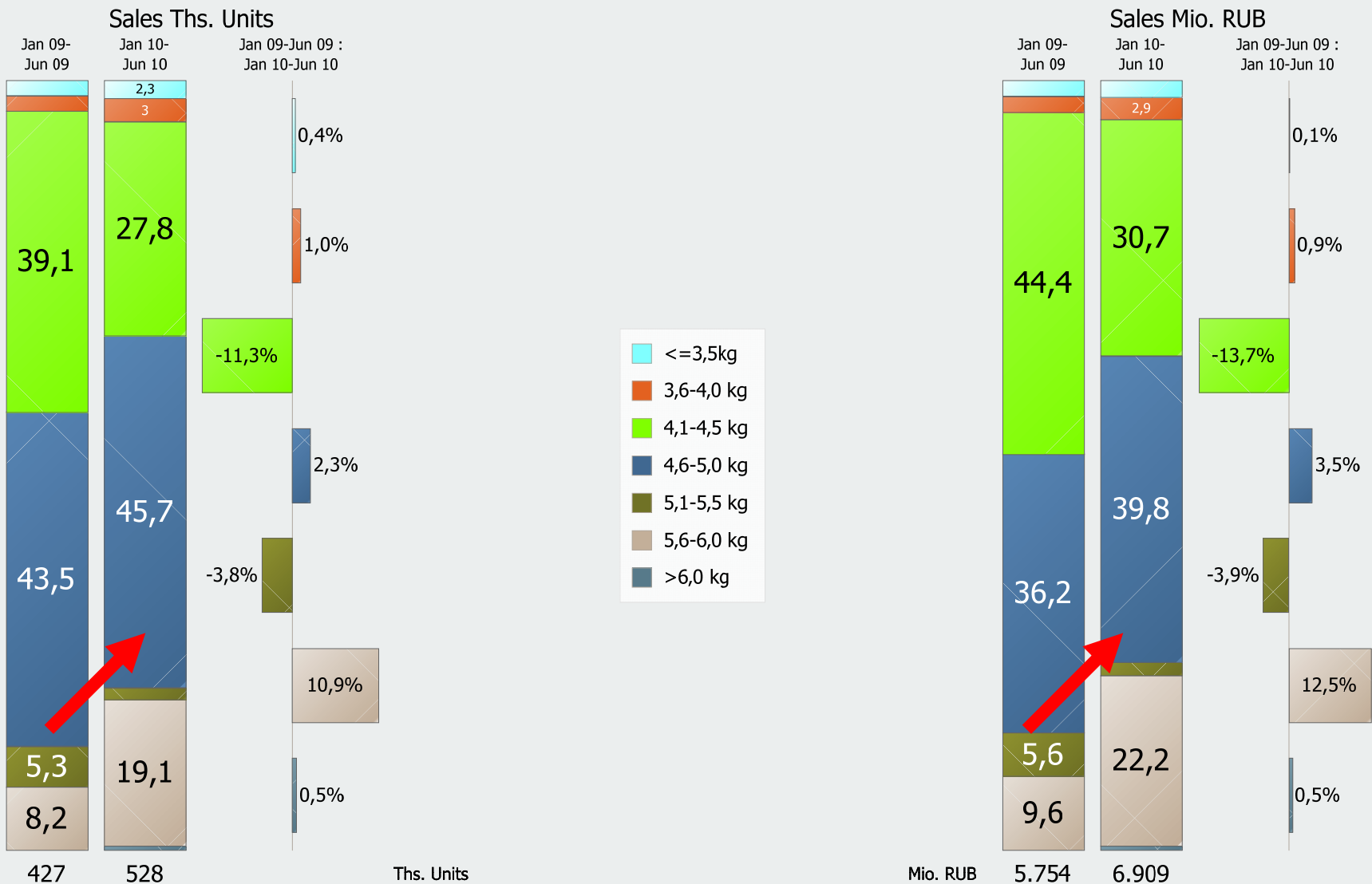
**+15 %
Total Val.
growth**



WASHINGMACHINES

Kilo classes Shares and Growth
Jan 10-Jun 10

Russia Panelmarket
FULLAUTOMATIC FR. > 35 <= 45 cm deep



WASHING MACHINES

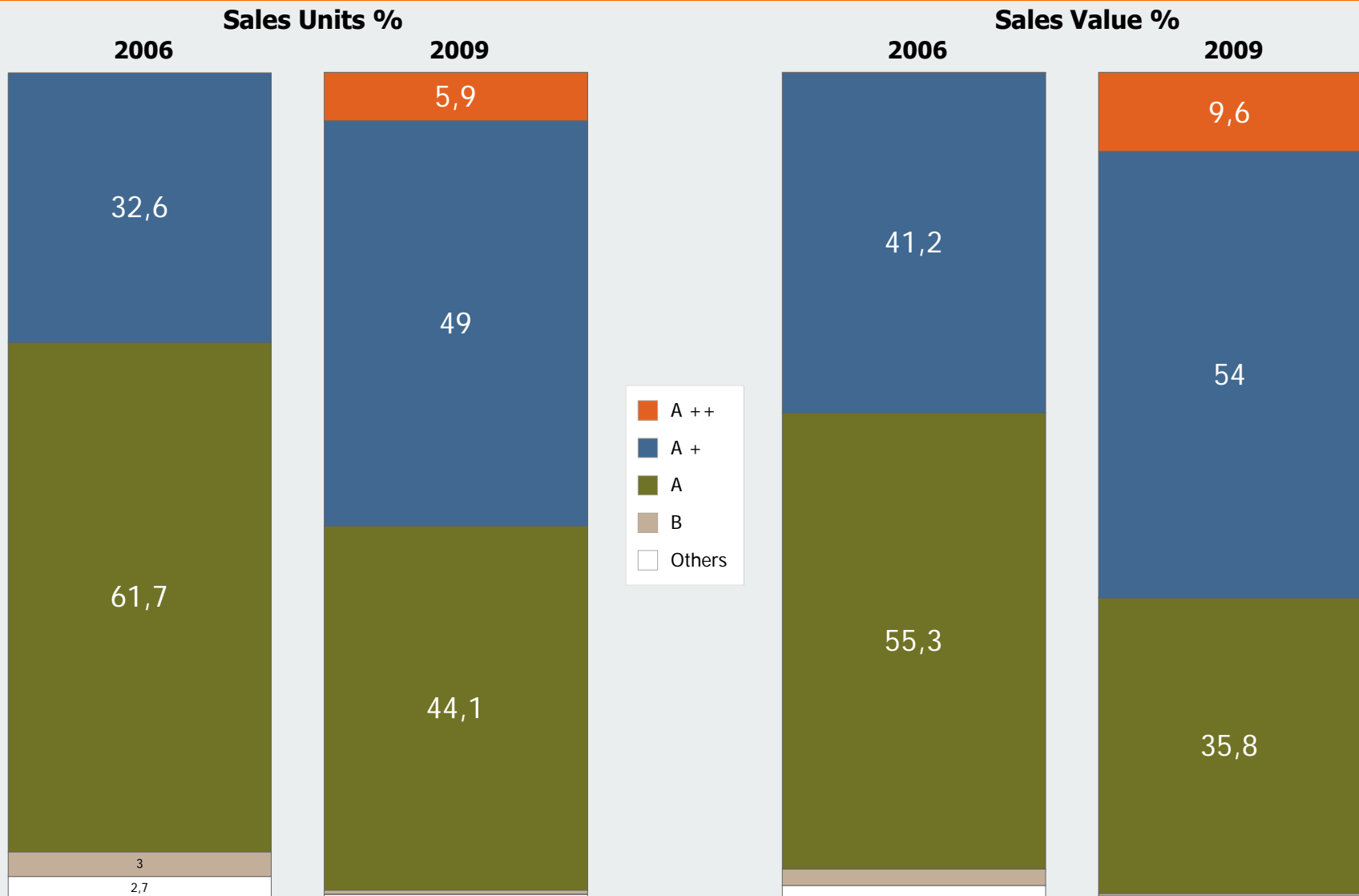
Sales Units %, Sales Value %

2006 vs 2009

FRONTLOADING

10 Countries West Europe

ENERGY EFFICIENCY CLASSES

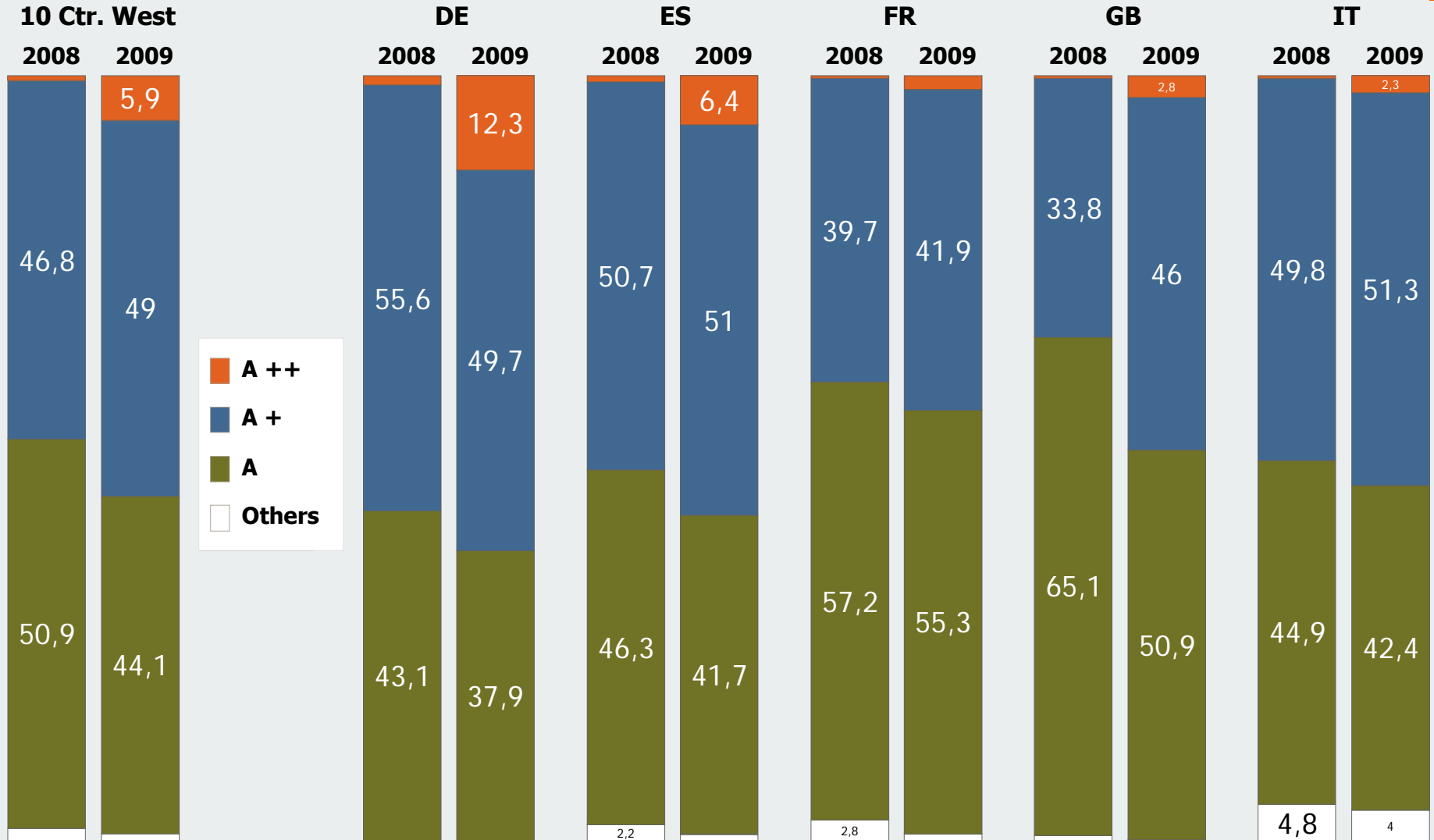


WASHING MACHINES

Sales Units %
2008 vs 2009

FRONTLOADING

West Europe
ENERGY EFFICIENCY CLASSES



WASHING MACHINES

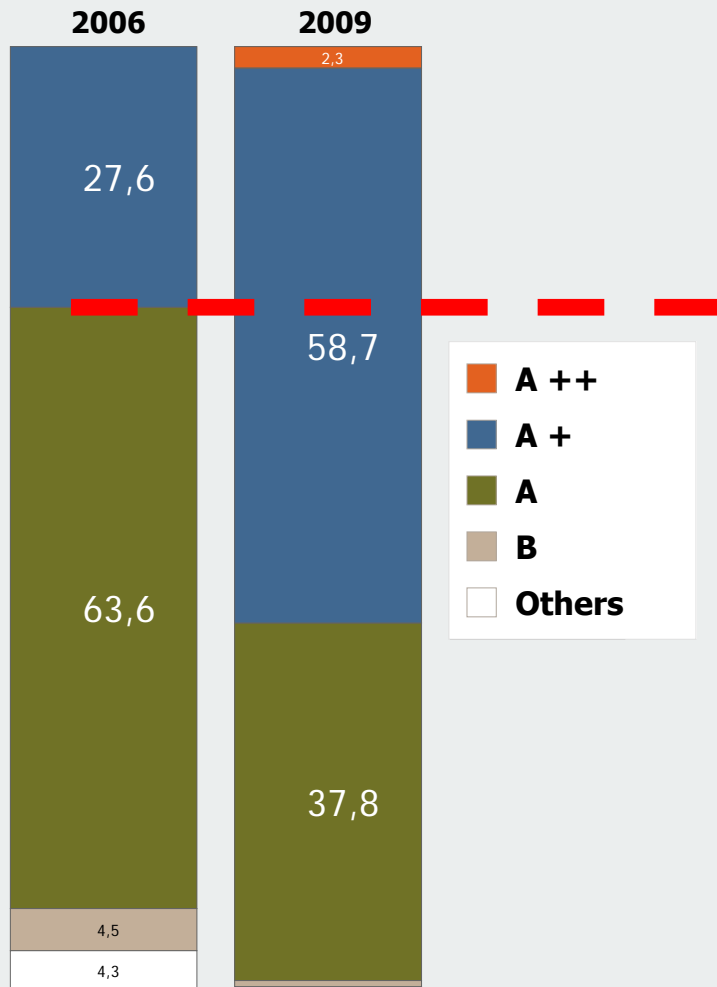
Sales Units %,

2006 vs. 2009, 2008 vs. 2009

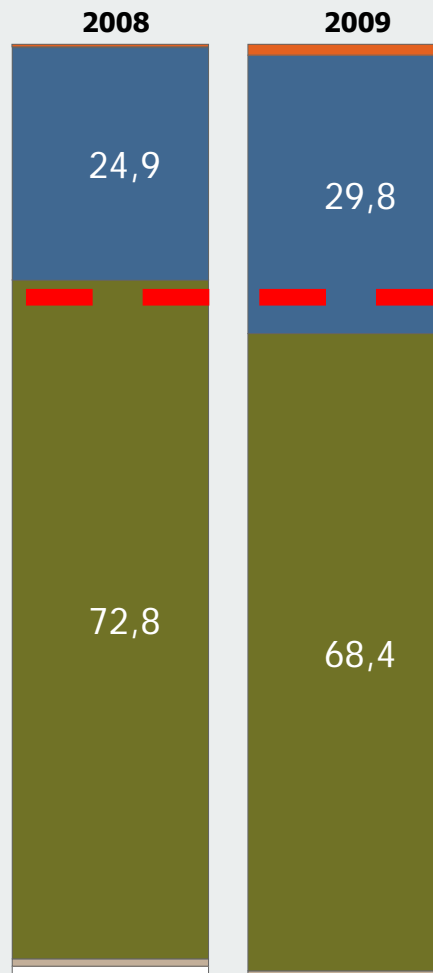
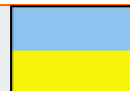
FRONTLOADING

ENERGY EFFICIENCY CLASSES

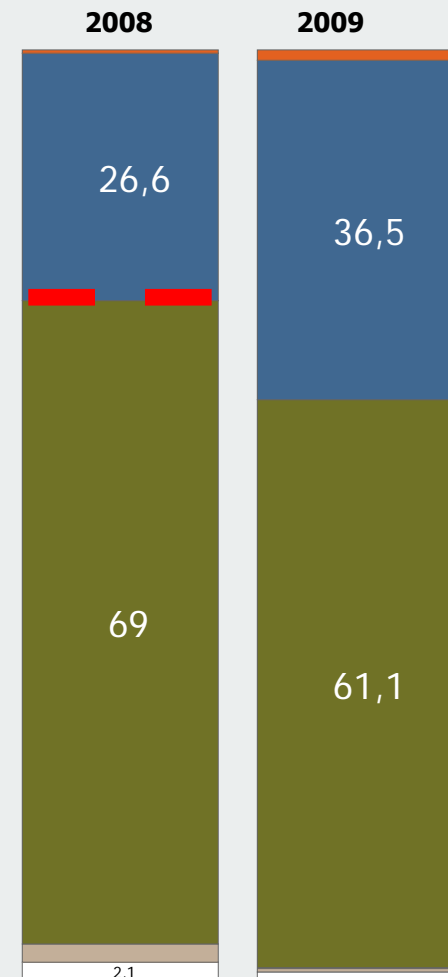
8 Countries Central Europe



UA



RU

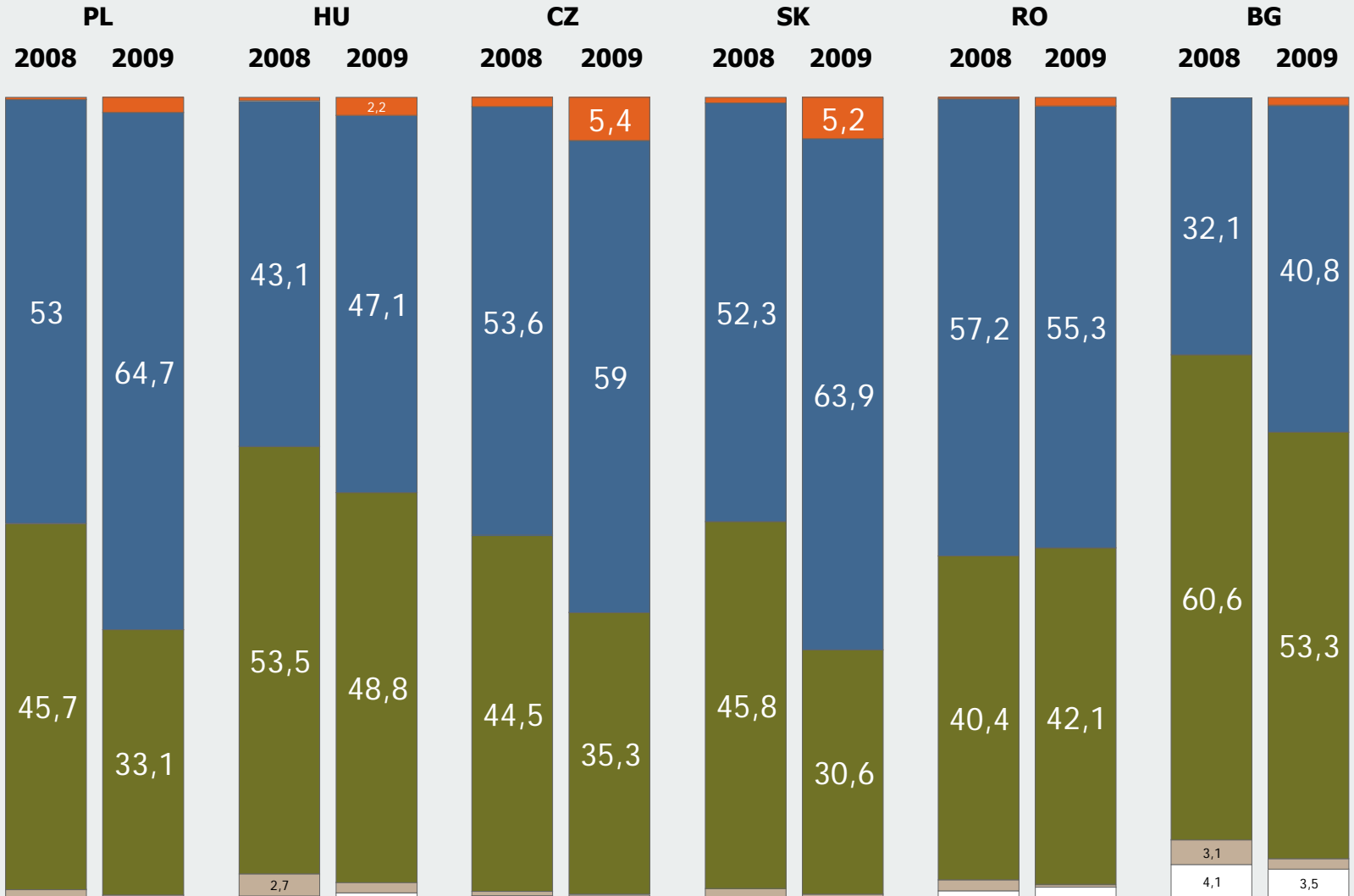


WASHING MACHINES

Sales Units %
2008 vs 2009

FRONTLOADING

Central Europe
ENERGY EFFICIENCY CLASSES



WASHING MACHINES

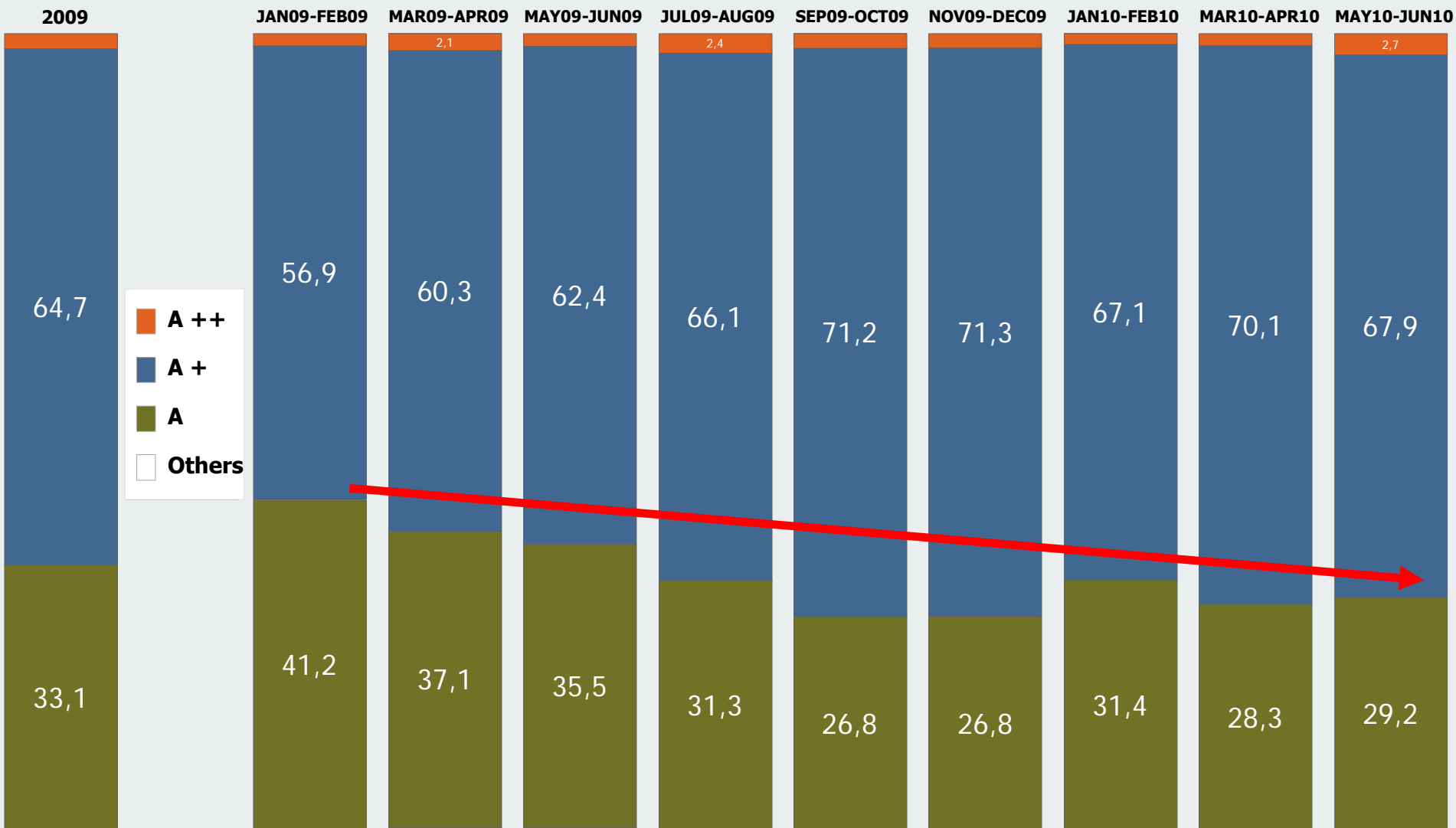
Sales Units %

Year 2009 + 9 BIMONTHS

FRONTLOADING

Poland

ENERGY EFFICIENCY CLASSES



WASHING MACHINES

Sales Units %

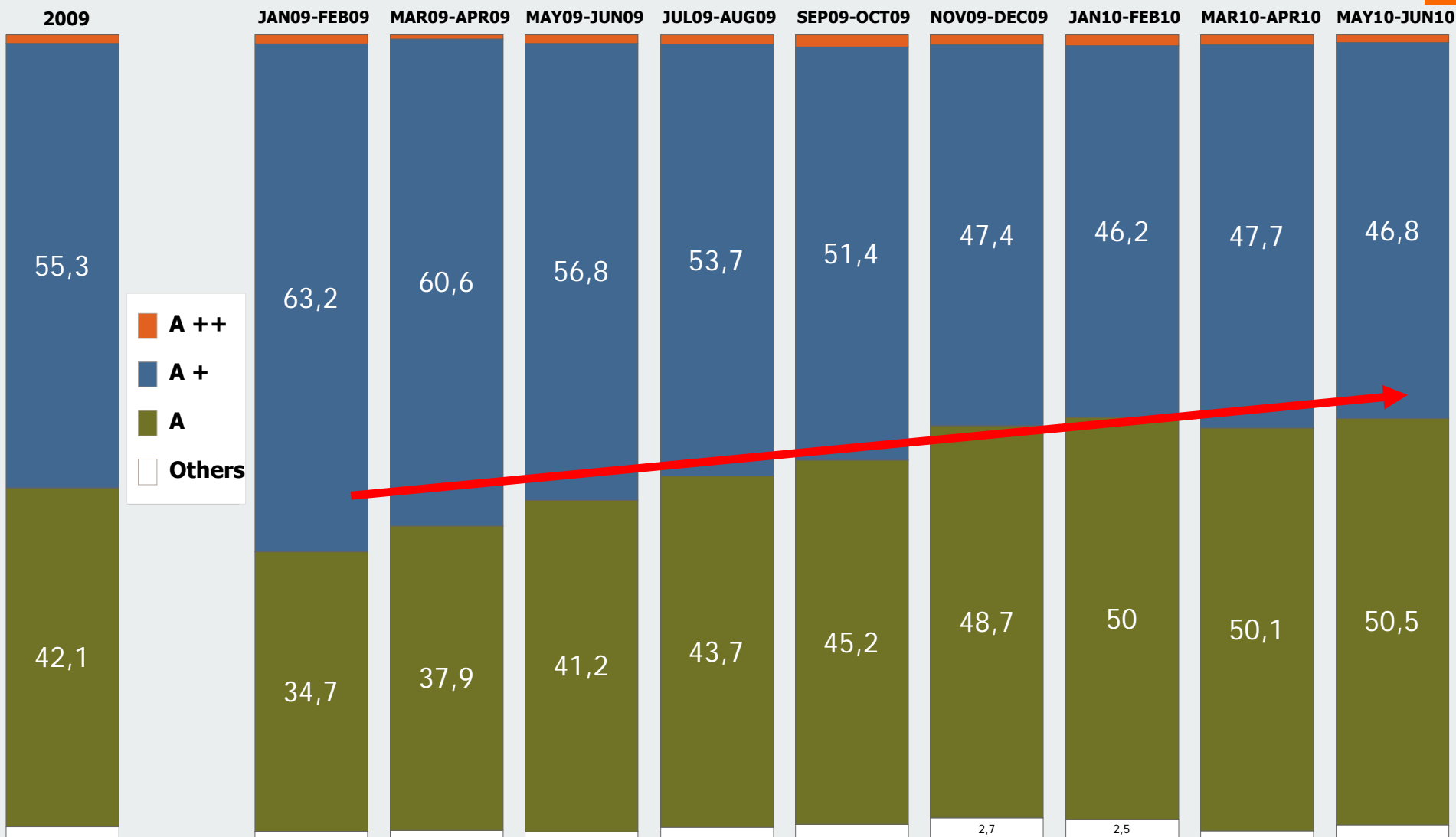
Year 2009 + 9 BIMONTHS

FRONTLOADING

Romania

ENERGY EFFICIENCY CLASSES

28



WASHING MACHINES

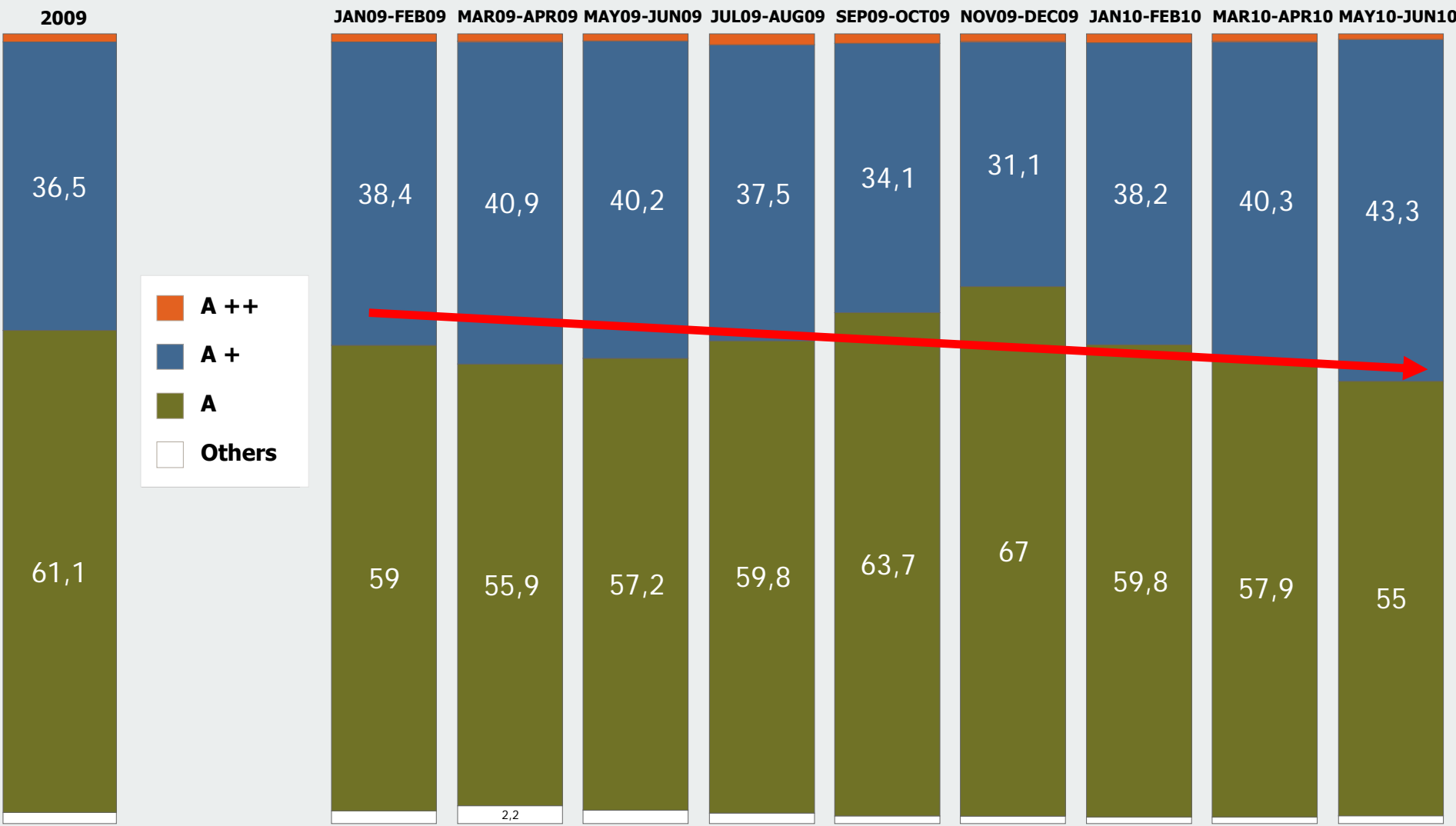
Sales Units %

Year 2009 + 9 BIMONTHS

FRONTLOADING

Ukraine

ENERGY EFFICIENCY CLASSES



WASHING MACHINES

Sales Units %

Year 2009 + 9 BIMONTHS

FRONTLOADING

Russia

ENERGY EFFICIENCY CLASSES

30

2009

JAN09-FEB09

MAR09-APR09

MAY09-JUN09

JUL09-AUG09

SEP09-OCT09

NOV09-DEC09

JAN10-FEB10

MAR10-APR10

MAY10-JUN10

29,8

68,4



28

70

27

70,8

26,5

72

29,5

68,9

32

66,2

34,5

63,8

32,4

66

35,1

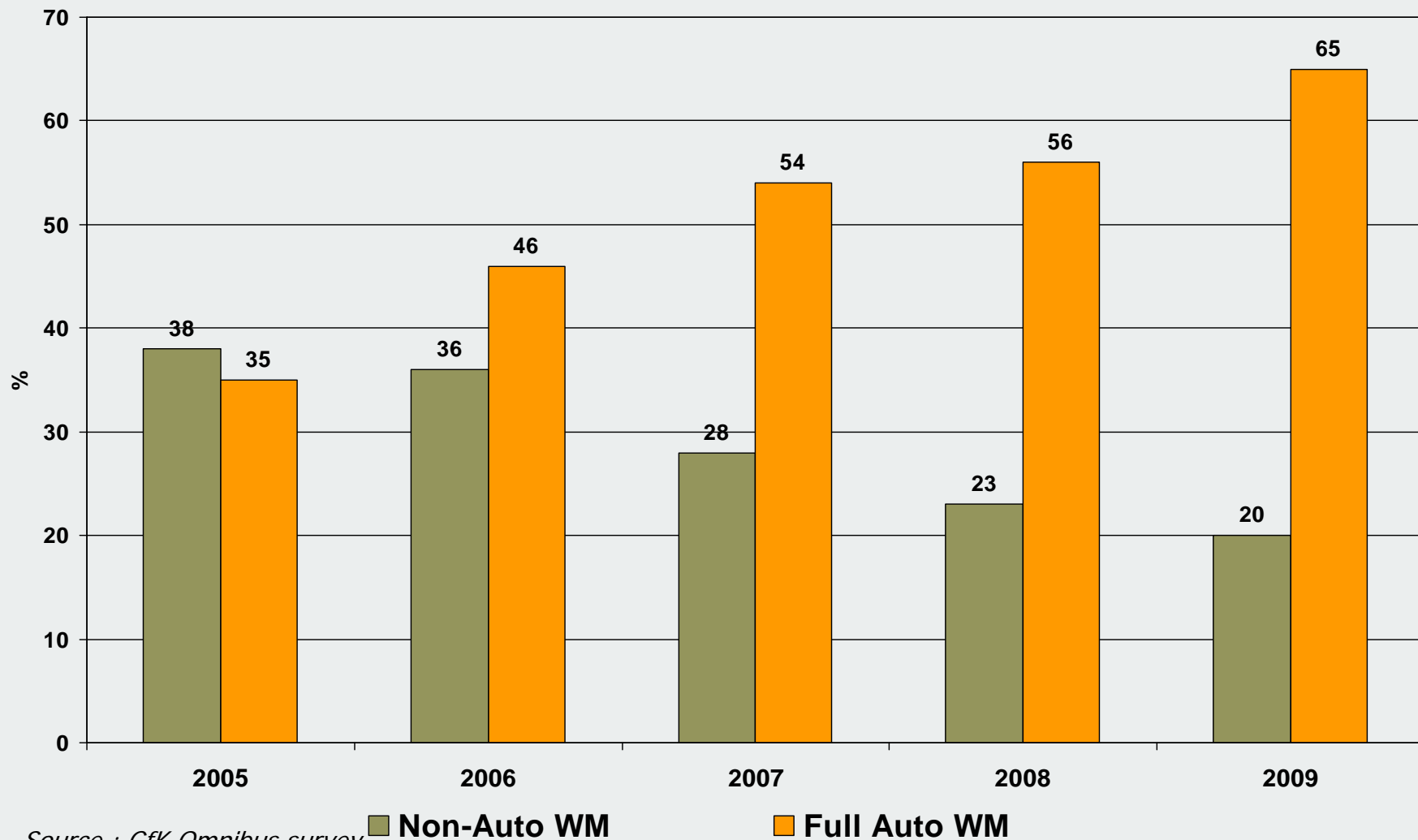
62,9

33,4

64,6

Ownership rate MDA Russia, % Washing Machines replacement

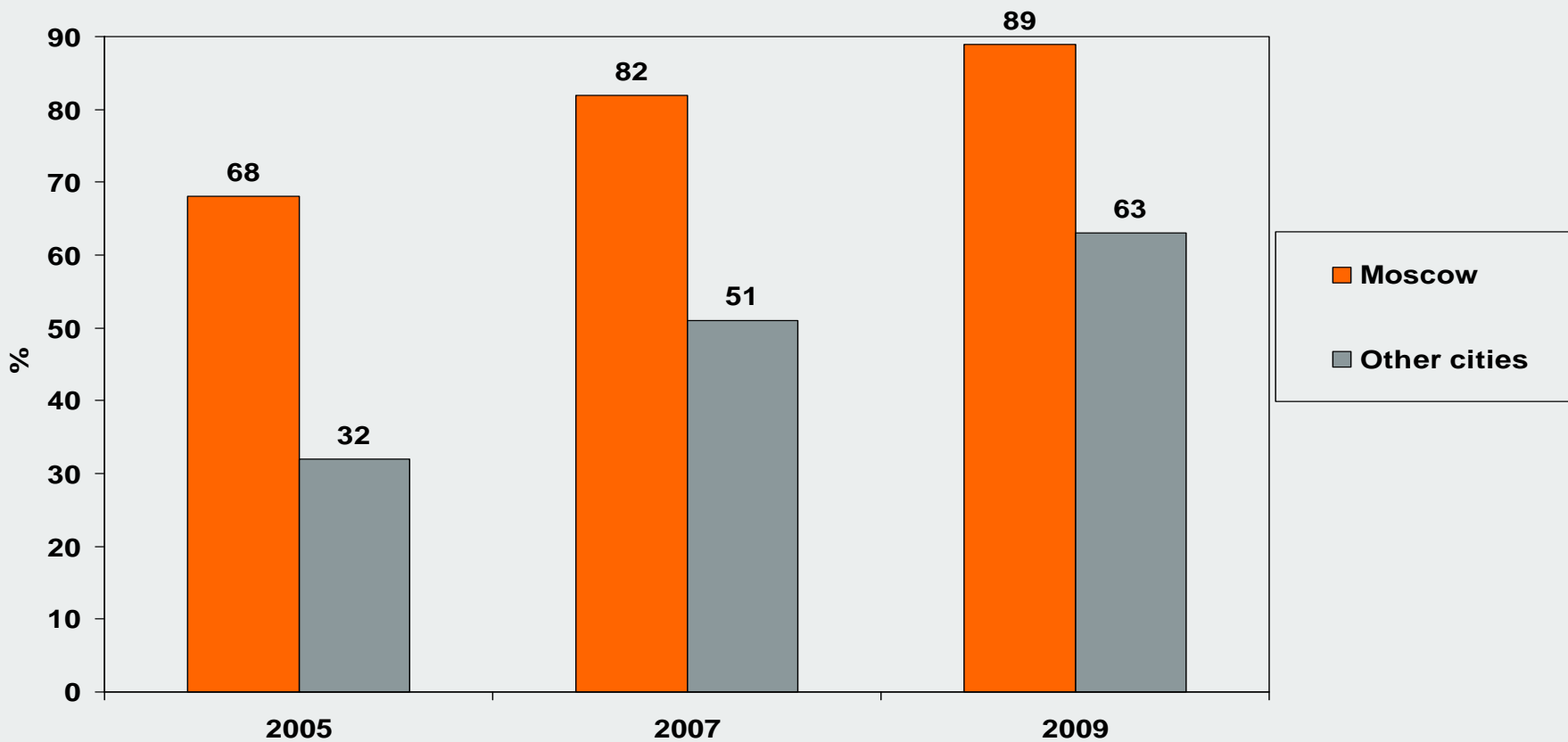
31



Ownership rate Full Auto Washing Machines Russia, %

Moscow and Russia

32



WASHING MACHINES

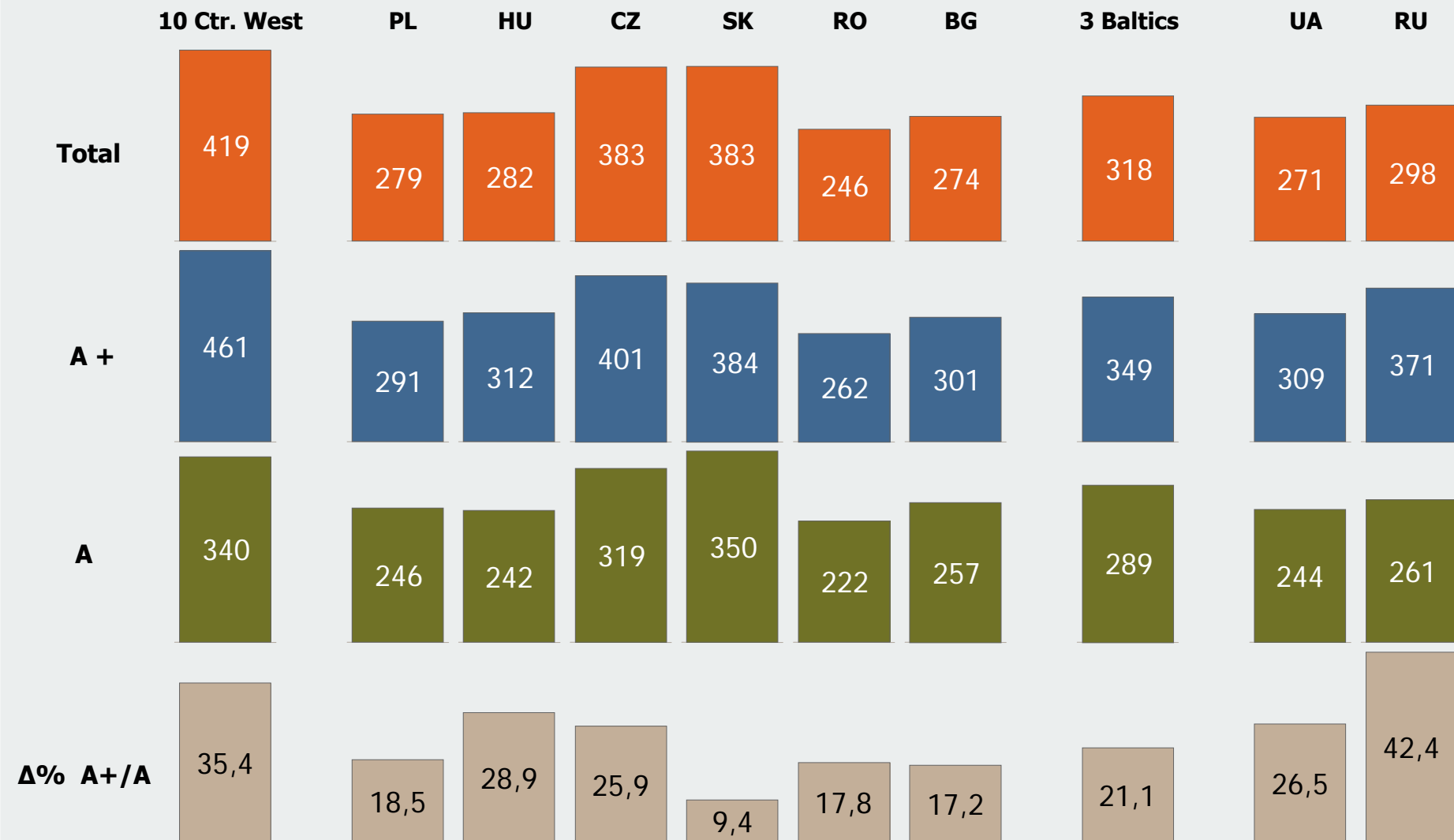
Price EUR

Year 2009

FRONTLOADING

COMPARISON A+ vs A

33



REFRIGERATORS
CENTRAL EASTERN EUROPEAN COUNTRIES
Year 2009

COOLING

Sales Ths. Units

Year 2009

GfK Panelmarket Europe

Central EU

Baltics

East EU

35



1.643,7

940,6

PL

187,6

HU

316

CZ

111,6

SK

375,7

RO

147,1

BG

83,9

HR

63,4

SI

56

LT

29

LV

22

EE

486,9

UA

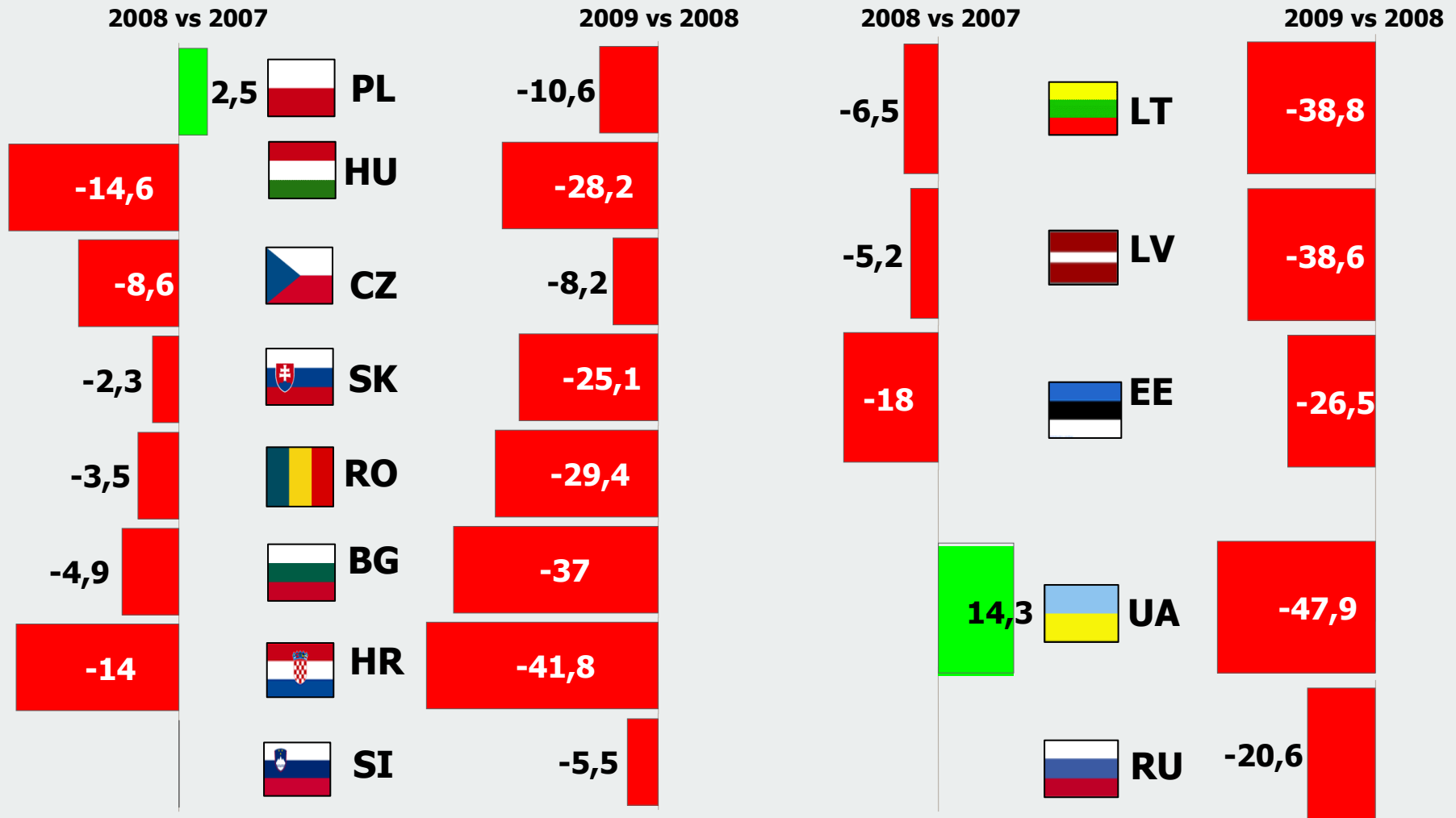
RU

COOLING

Sales Units Growth Rate vs previous year

Trend over the last 2 years

36



REFRIGERATORS the segments

37

1 DOOR



2 DR FREEZER BOTTOM



2 DR FREEZER TOP



COOLING

Sales Units %

Year 2009

Importance of segments

GfK Panelmarket Europe

38

10 Ctr. West

8 Ctr. Central

PL

HU

CZ

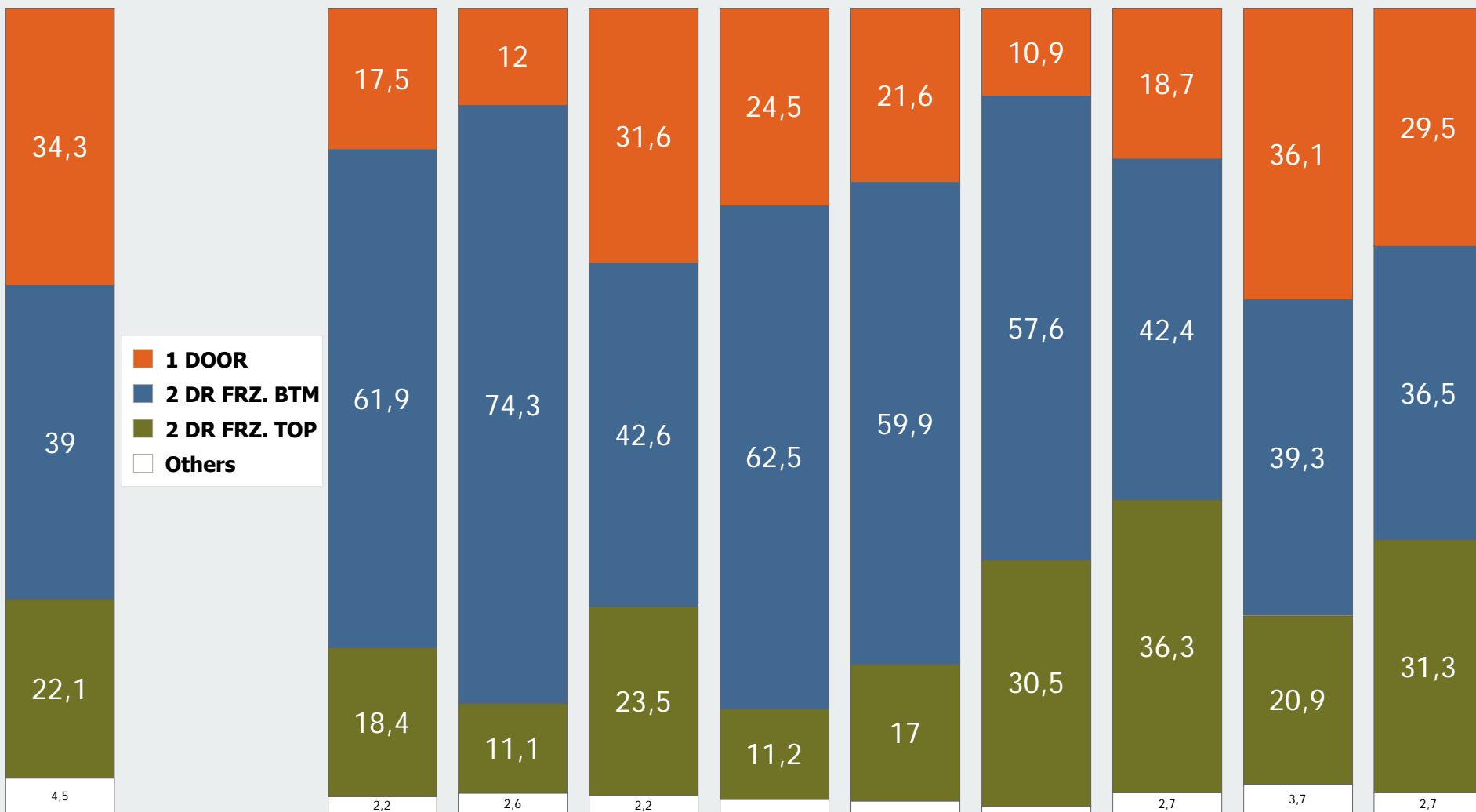
SK

RO

BG

SI

HR



COOLING

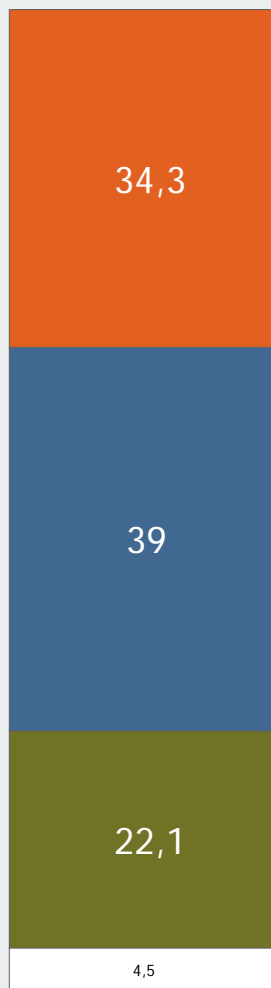
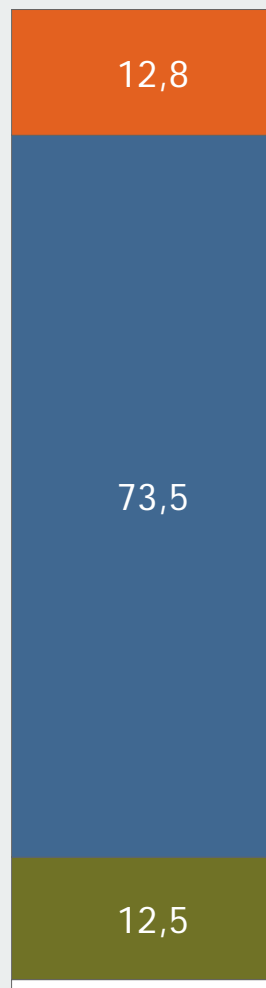
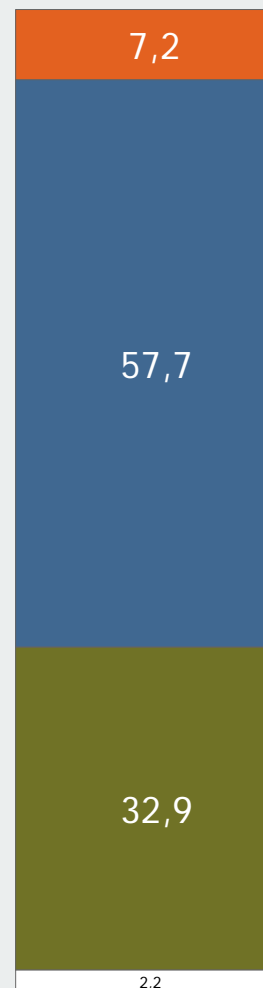
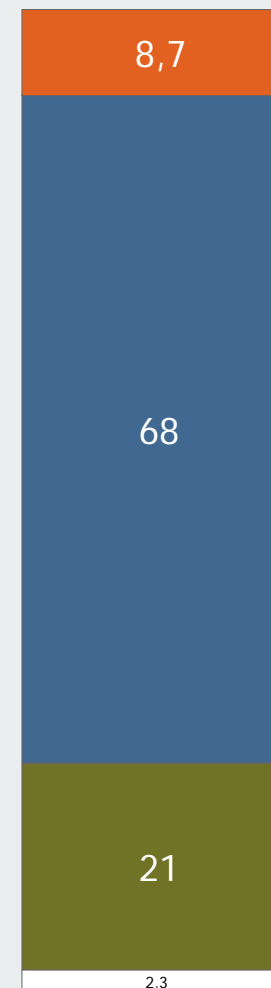
Sales Units %

Year 2009

Importance of segments

GfK Panelmarket Europe

39

10 Ctr. West**3 Baltics****Ukraine****Russia**

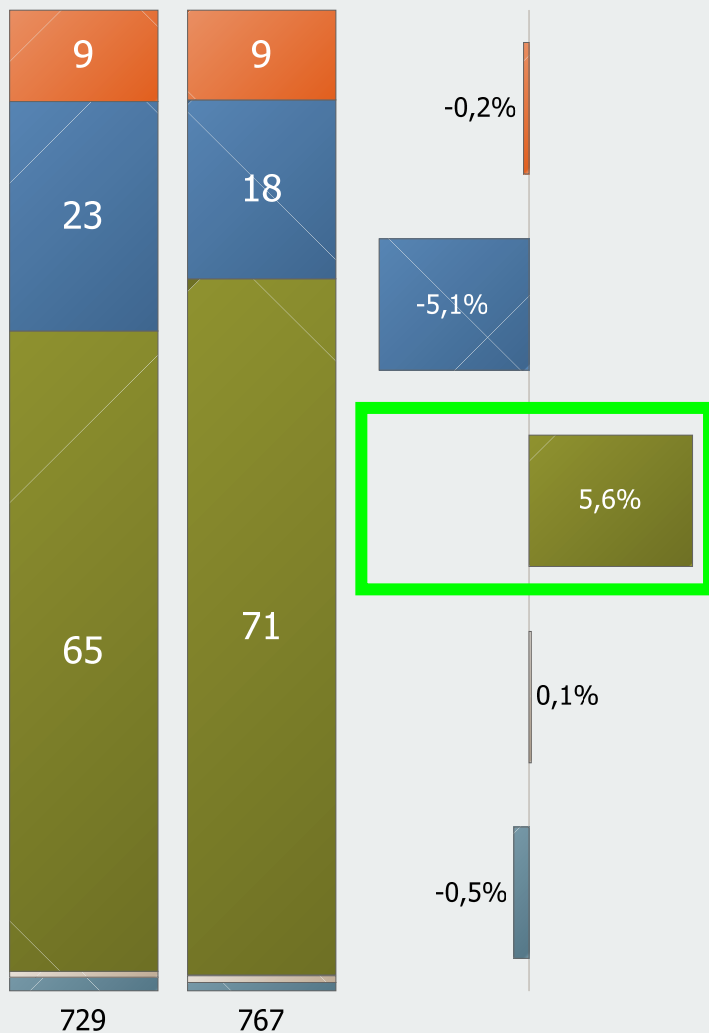
■ **1 DOOR**
■ **2 DR FRZ. BTM**
■ **2 DR FRZ. TOP**
■ **Others**

COOLING

Main Types Development
JAN10-JUN10

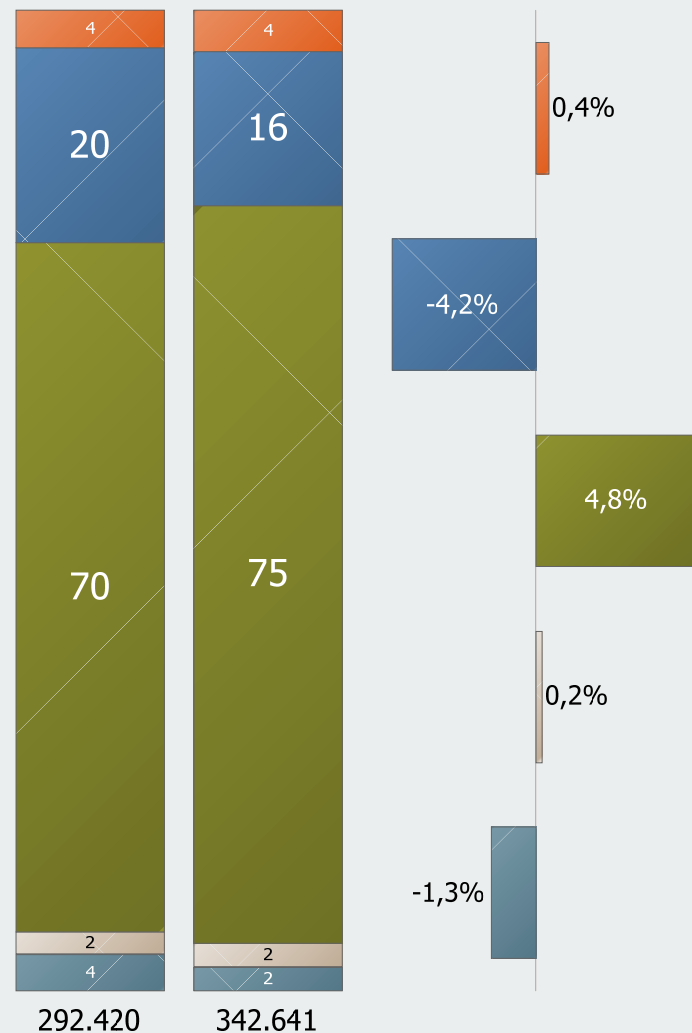
Russia Panelmarket
FREESTANDING

Sales Units %
JAN09-JUN09 JAN10-JUN10 JAN09-JUN09 : JAN10-JUN10



- 1 DOOR
- 2 DR FRZ. TOP
- 2 DR FRZ. BTM
- 3+ DOORS
- SIDE BY SIDE

Sales Value %
JAN09-JUN09 JAN10-JUN10 JAN09-JUN09 : JAN10-JUN10



COOLING

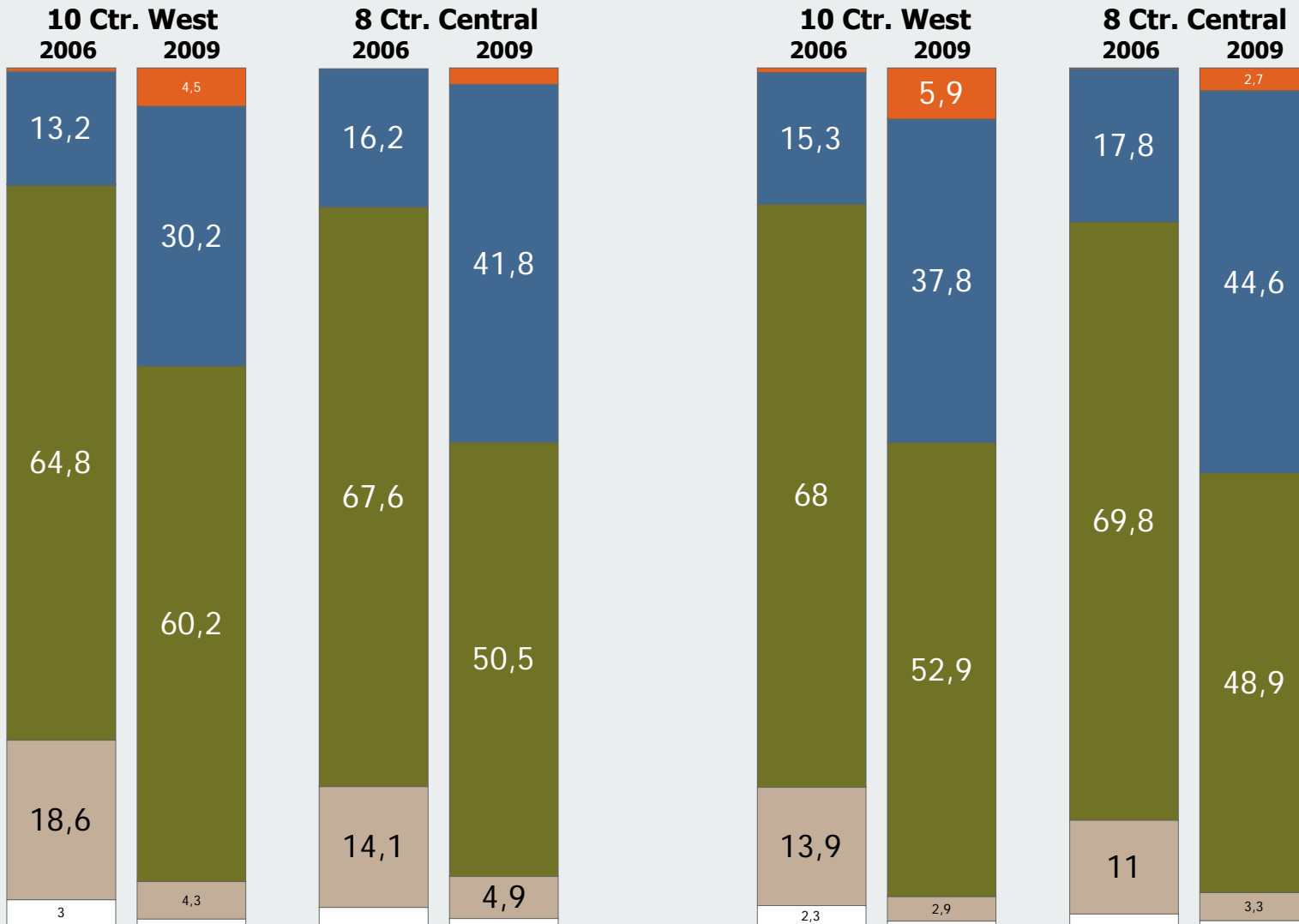
Sales Units, Sales Value

2006 vs 2009

ENERGY EFFICIENCY CLASSES

Sales Units %

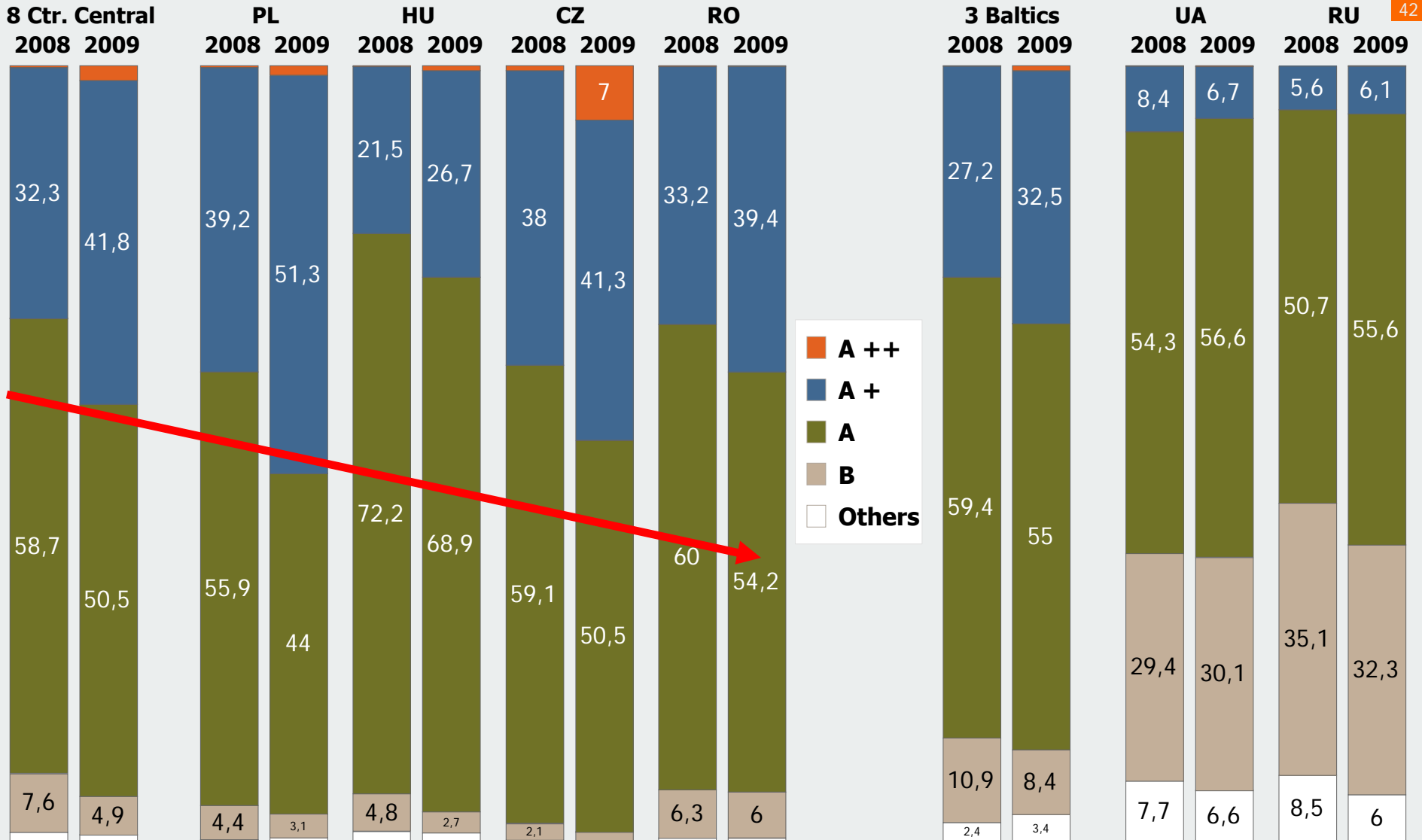
Sales Value %



COOLING

Sales Units %
2008 vs 2009

ENERGY EFFICIENCY CLASSES



COOLING

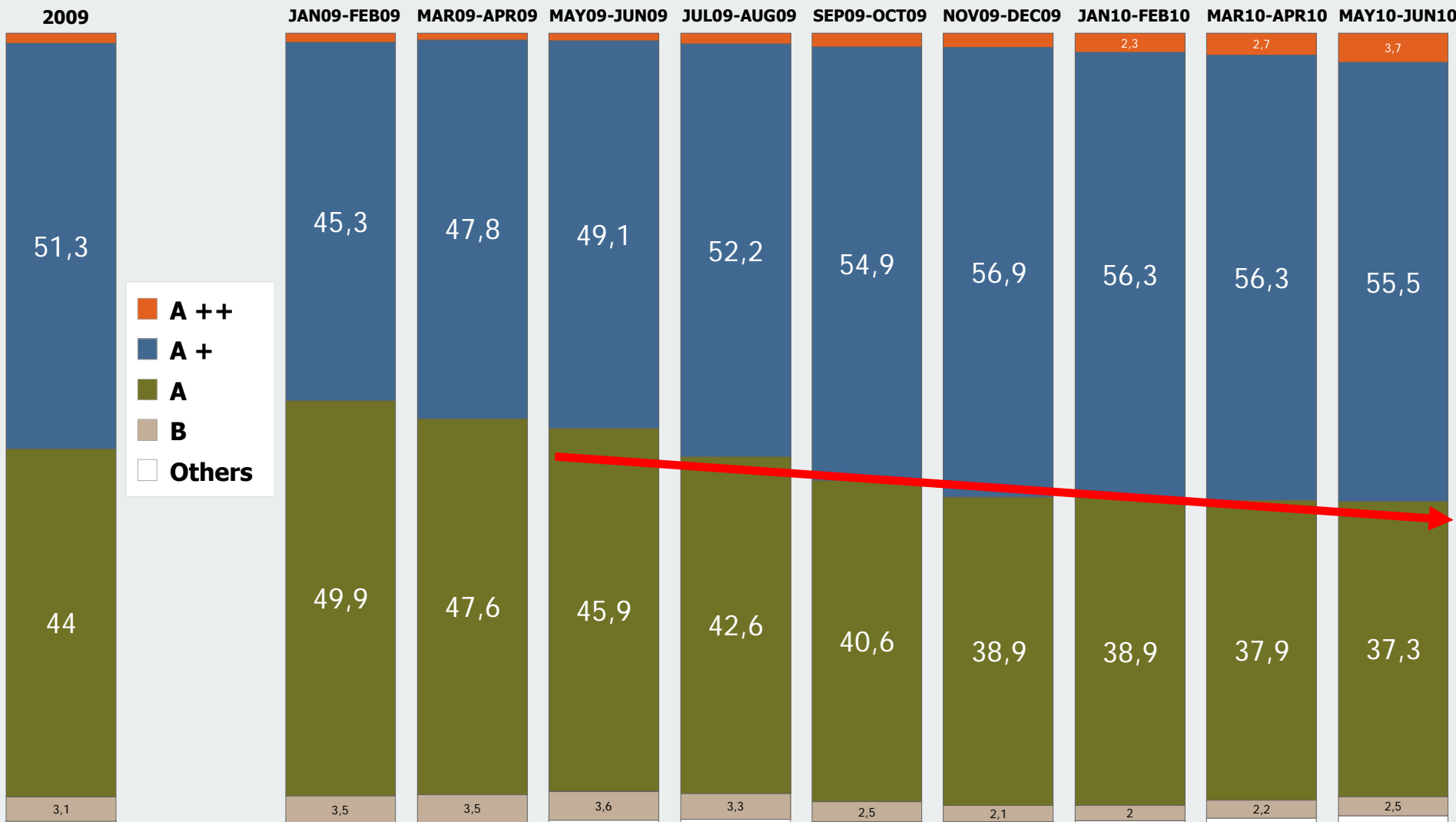
Sales Units %

Year 2009 + 9 BIMONTHS

Poland

ENERGY EFFICIENCY CLASSES

43



COOLING

Sales Units %

Year 2009 + 9 BIMONTHS

Ukraine

ENERGY EFFICIENCY CLASSES

45

2009

JAN09-FEB09

MAR09-APR09

MAY09-JUN09

JUL09-AUG09

SEP09-OCT09

NOV09-DEC09

JAN10-FEB10

MAR10-APR10

MAY10-JUN10

6,7

56,6

30,1

6,6



8,2

56,5

25,9

9,4

6,8

55,4

29,2

8,4

5,6

54,9

33

6,4

6,5

58

31,2

4,1

6,4

56,1

31,8

5,7

6,8

57,9

28,3

6,8

7,1

57,8

27,3

7,5

7,5

54,2

31,6

6,6

8,3

57

29,5

4,9

COOLING

Sales Units %

Year 2009 + 9 BIMONTHS

Russia

ENERGY EFFICIENCY CLASSES

46

2009

JAN09-FEB09

MAR09-APR09

MAY09-JUN09

JUL09-AUG09

SEP09-OCT09

NOV09-DEC09

JAN10-FEB10

MAR10-APR10

MAY10-JUN10

6,1

7

6,5

6,3

5,5

5,6

6,1

6,8

6,6

7,9

55,6

52,9

52,5

54,9

56,2

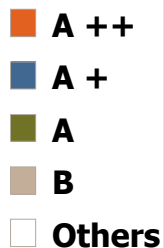
57,4

58,7

57,6

58,9

56,6



32,3

33,6

33,9

32,6

32,1

31,5

30,2

29,4

28,5

26,5

6

6,4

7,1

6,1

6,1

5,5

4,9

6

5,9

8,8

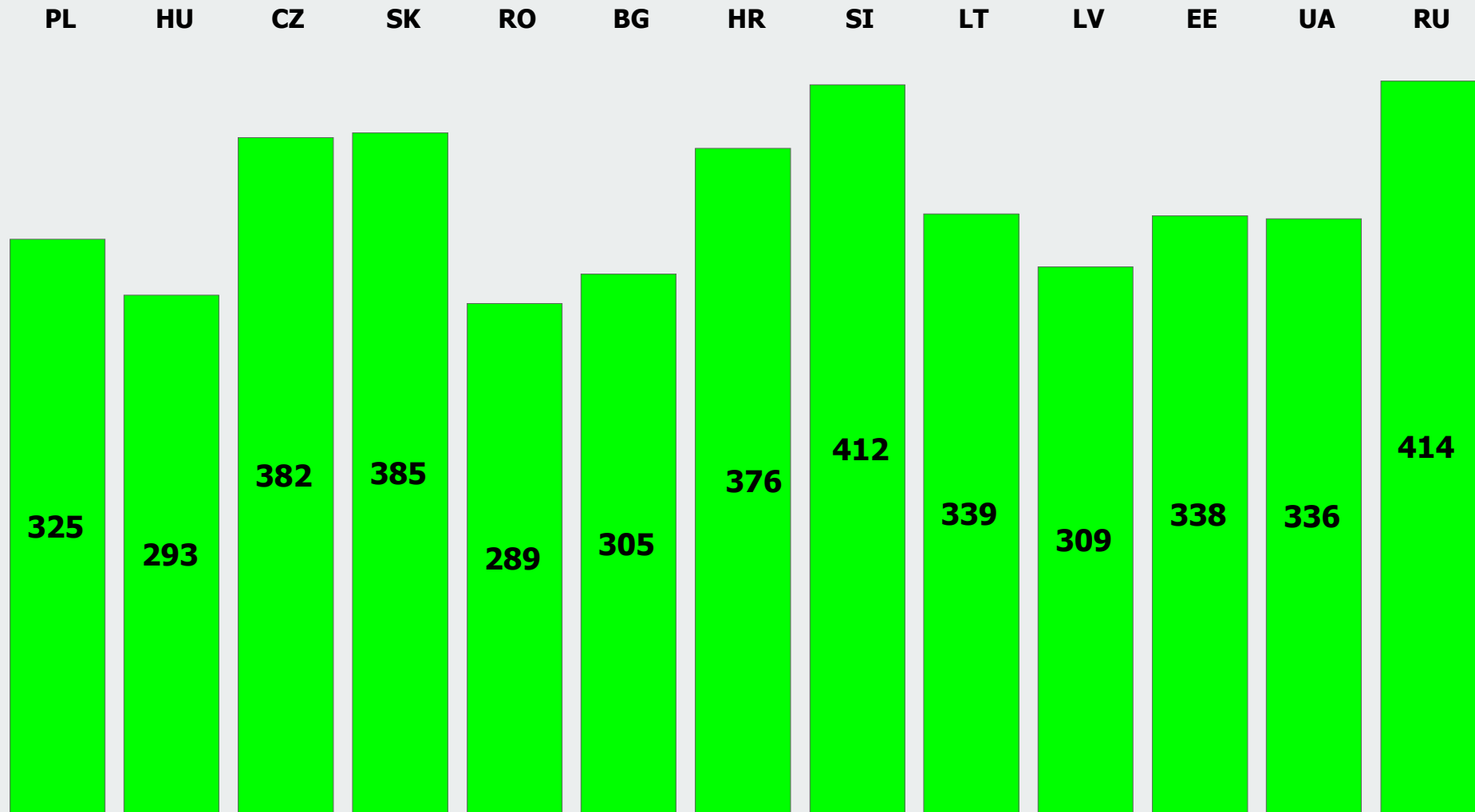
COOLING

Price EUR

Year 2009

GfK Panelmarket Europe

47



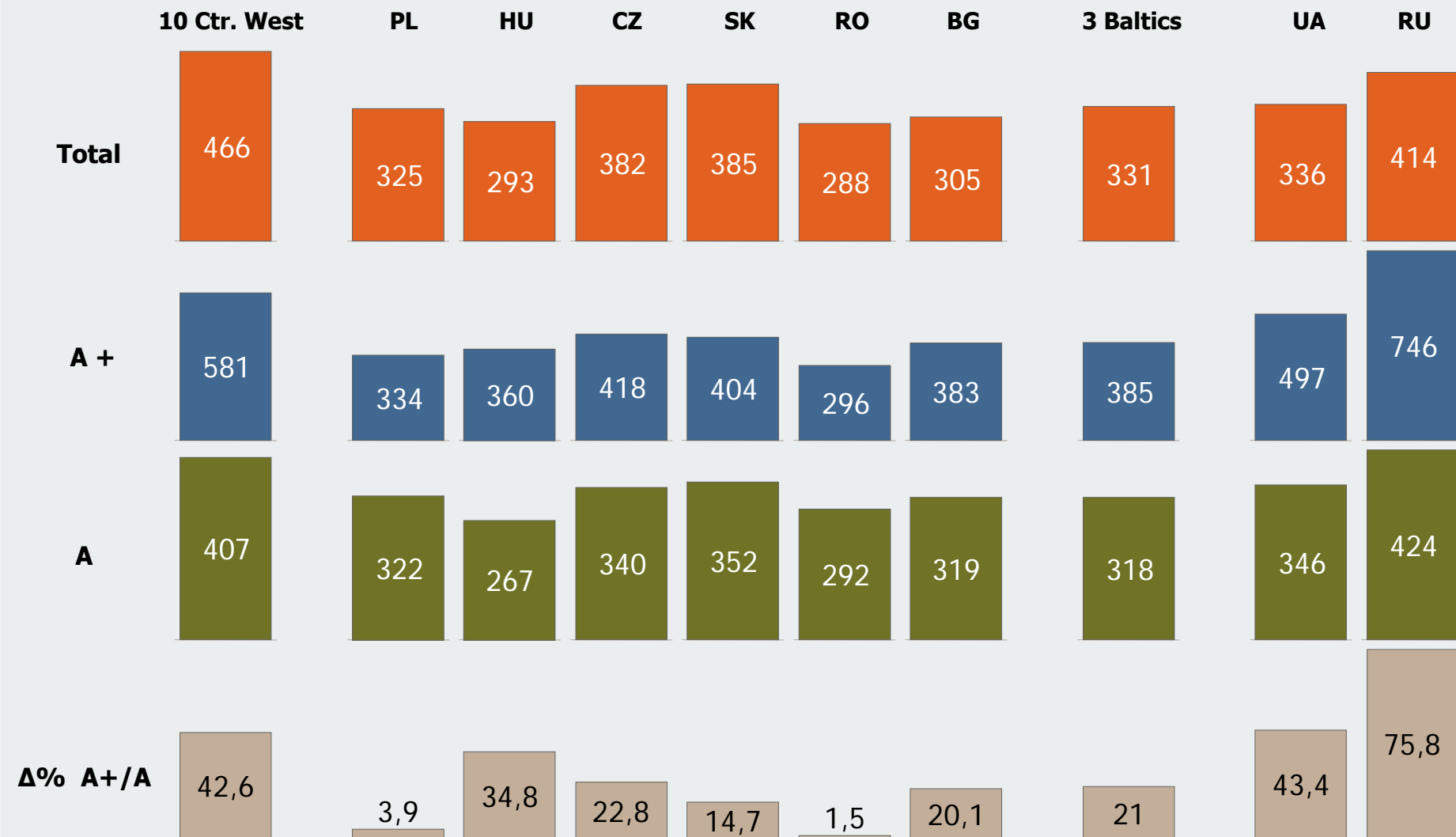
COOLING

Price EUR

Year 2009

Price for the different segments**COMPARISON A+ vs A**

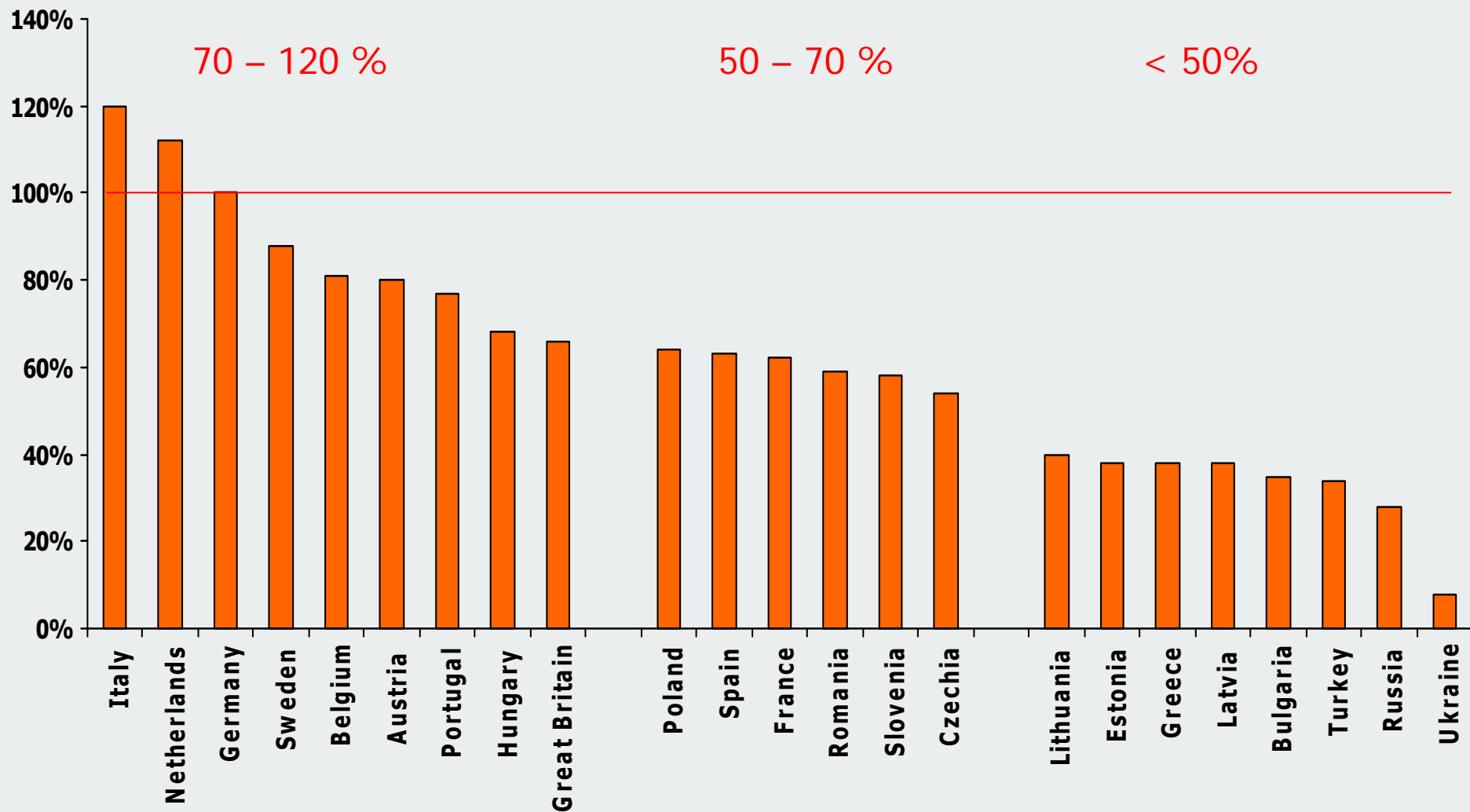
48



Energy cost in West and East Europe

Germany = 100%

49



Summary

50

- **Knowing consumer habits and expectations**
- **Consumer Education and motivation for purchasing energy efficient products**
- **Methodology for calculation the consumption per household**
- **Explaining the real saving purchasing high energy efficient Domestic Appliance**
- **Motivation for Retailers selling energy efficient products**

A person wearing a white lab coat is holding a blue globe of the Earth with both hands. The globe is centered in the frame, and the person's hands are visible on either side, gripping the globe. The background is a soft, out-of-focus white. A semi-transparent white banner is overlaid across the middle of the image, containing the text "THANK YOU" and "СПАСИБО" in bold, dark blue capital letters.

THANK YOU
СПАСИБО