

A Business Perspective

A.I.S.E. Information Day,
6 December 2012

Jonas Samuelson
CEO Major Appliances EMEA



Thinking of you
Electrolux

This is Electrolux



Position

- Sales EUR 12 billion
- Op income EUR 400 million
- Sales in more than 150 markets
- A world leader in appliances

150
MARKETS

People

- 58,000 in 60 countries

60
COUNTRIES

Products

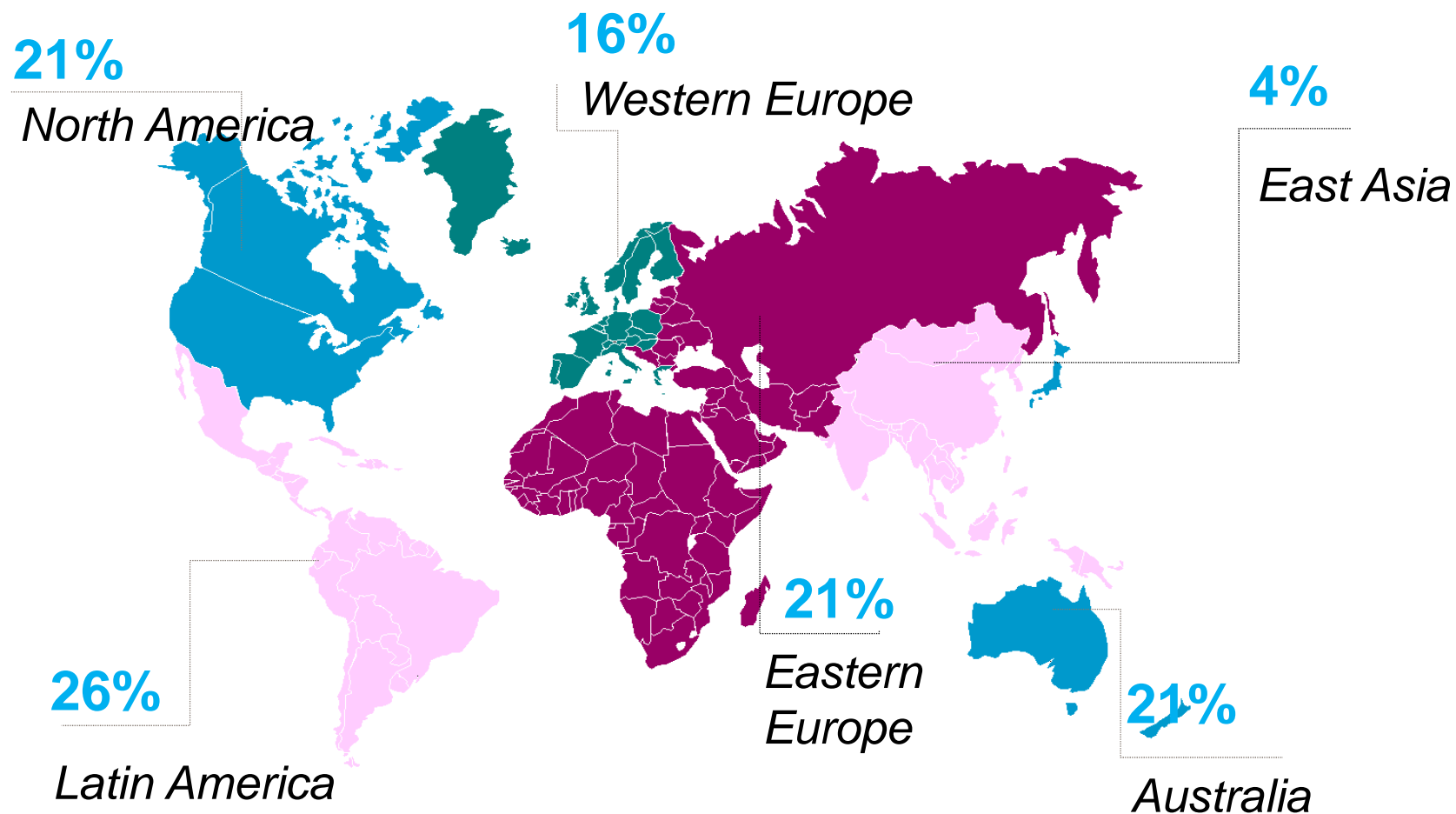
- More than 40 million products per year
- To meet the real needs of consumers and professionals

40
MILLION

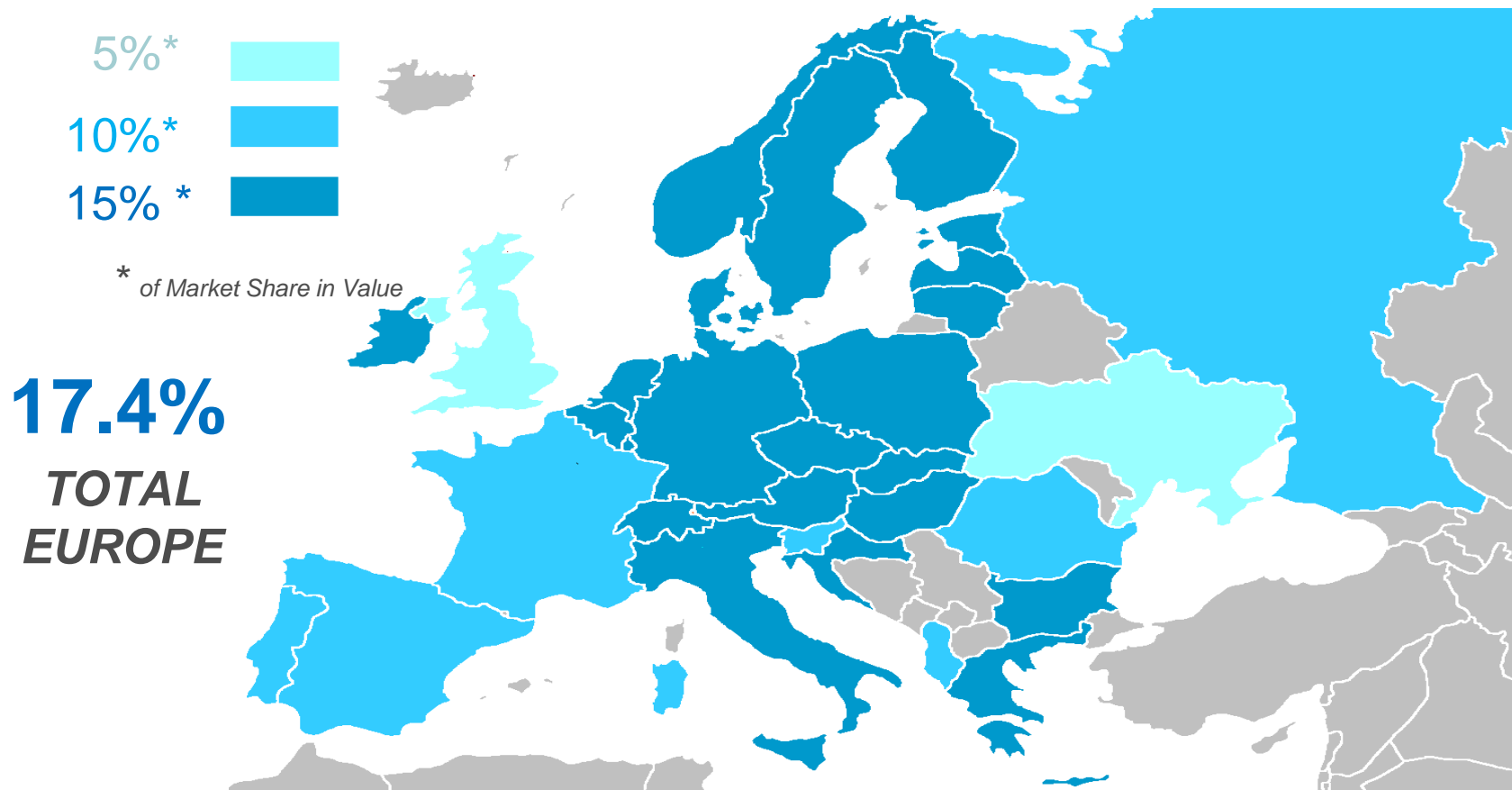


Figures as of 2011

Present and growing in all continents



Wide presence in Europe with growing market share



* 34 countries, internal estimations HY 2012

... leveraging some clear competitive strengths



'Glocal' presence



Scandinavian heritage



Professional expertise



Consumer insight



Product breadth



Dishwashers



- We are selling around 3 million units globally – no. 2-3 globally
- Large opportunity in global household penetration
- If every household in Europe used a dishwasher instead of washing by hand, over 990 billion liters of water a year could be saved in Europe, which is the equivalent of Denmark's water consumption for a whole year.

3
MILLION UNITS
GLOBALLY



Laundry Products



- We are selling around 7 million units globally – no. 2 globally
- Many industry firsts:
 - Washers above A+++ efficiency
 - A+++ heat pump tumble dryer
 - 8kg capacity
 - 1800 rpm spinning
- The most silent washing machines on the market
- Leading Professional Laundry division

7
MILLION UNITS
GLOBALLY



Trends Washing Machines



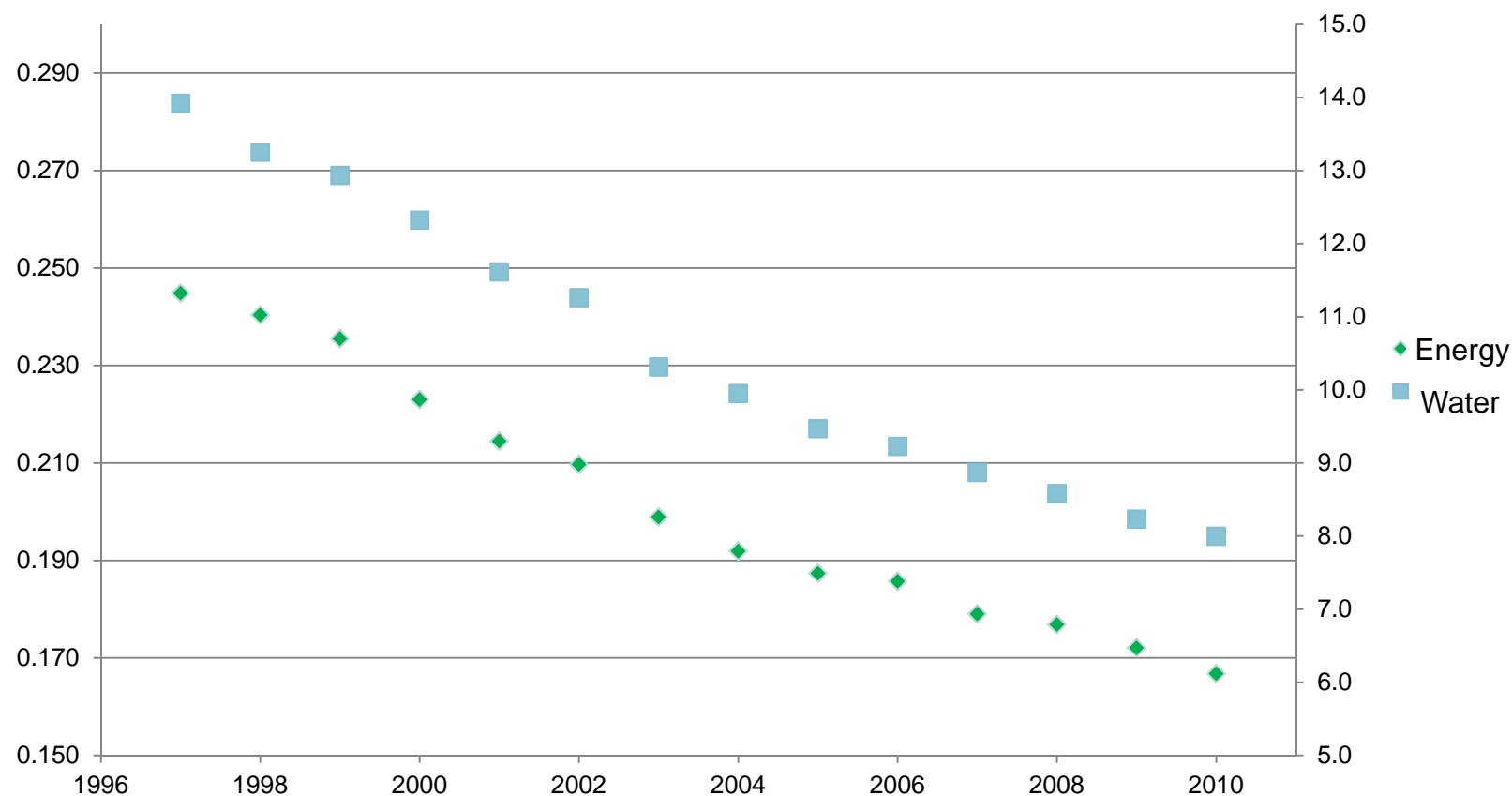
- Further improvement of energy efficiency
 - Low temperature and cold wash
 - High efficiency motors
- Larger capacities – Increased flexibility of use
- More focus on fabric care
- Further reduction of water consumption – potentially impacting rinsing
- Autodosing

Evolution of Energy and Water Consumption, Washing Machines



Energy kWh/kg/cycle

Water liter/cycle

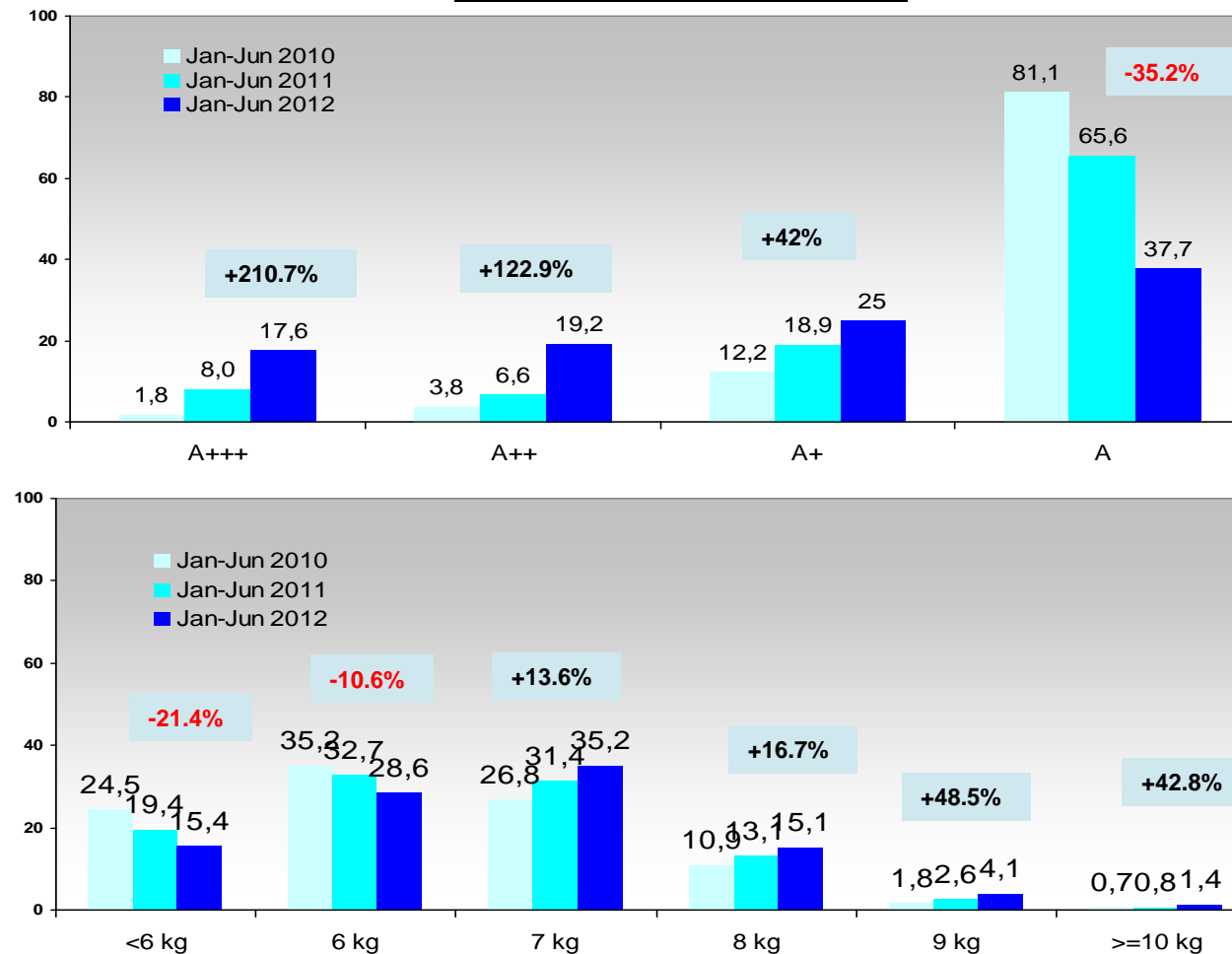


Average of models sold in Europe. Source: CECED Data

Growth in Energy Efficient and High Capacity Washing Machines



Market % breakdown - Volume



The Potential of Lower Temperatures



- **Washing Machines**

- 60° vs. 90° : -35 % energy
- 40° vs. 60° : -35 % energy
- 30° vs. 40° : -25 % energy
- Cold wash vs. 40° : -65% energy



Low Temperature Washing



- Saves energy and money but:
 - Longer wash programs
 - Good washing performance has to be secured
 - Hygiene and smell risks
 - $< 30\text{ C}$ needs special liquid detergent



The Importance of Machine Loading and Water/Detergent Dosing



- ~40% more energy per kg if Washing Machine runs half full instead of full
- Similar for Dish Washers
- Auto sensing and detergent dosing assistance important with larger capacities
- Dosing is complex and influences:
 - Cleaning result
 - Consumer economy
 - Environment and resource efficiency



AEG Neue Kollektion



Electrolux Inspiration Range



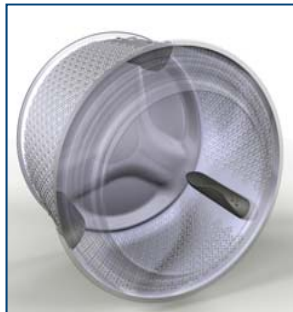
Electrolux Laundry Focus Areas



LAUNDRY CARE FOR A SMART LOOK



SteamSystem – Dewrinkle and Refresh:
Removes creases & folds from dry laundry.
Refresh function helps reduce dry cleaning



Truly XXL drum: Space to stretch out, much less creasing



Woolmark Gold:
Exceptionally gentle hand wash cycle

FLEXIBILITY AND EASE-OF-USE



Direct Touch & LCD:
Modern and intuitive, truly self-explanatory



TimeManager®:
You decide the cycle time, not the machine



Detergent: 125 ml

Dosing advice in ml:
Weight sensor gives perfect dosage info

WASHING MORE, USING LESS ENERGY



A+++(-20%), Auto-Off:
Exceptional energy rating, no stand-by



10 kg XXL soft drum:
Better washing and rinsing with any load



Inverter motor:
Silent, much quicker, 10 years warranty

Trends Dish Washers

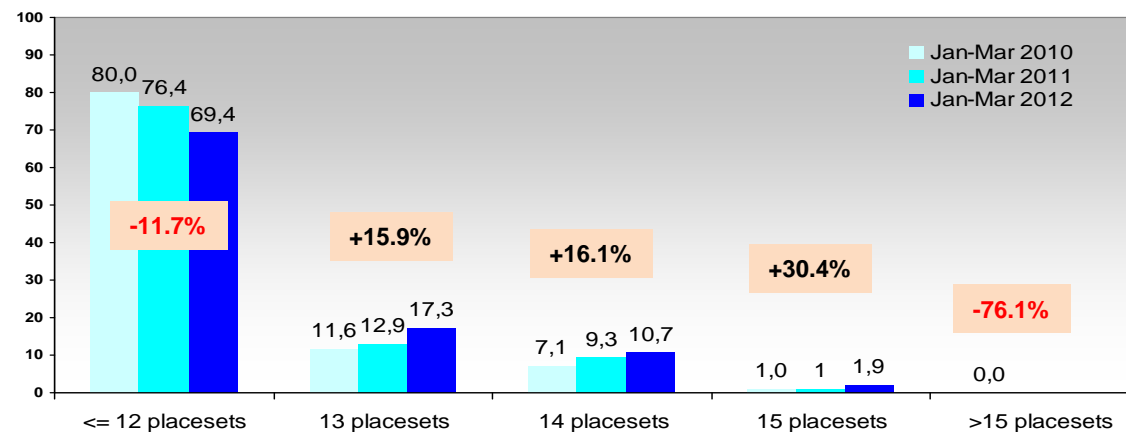
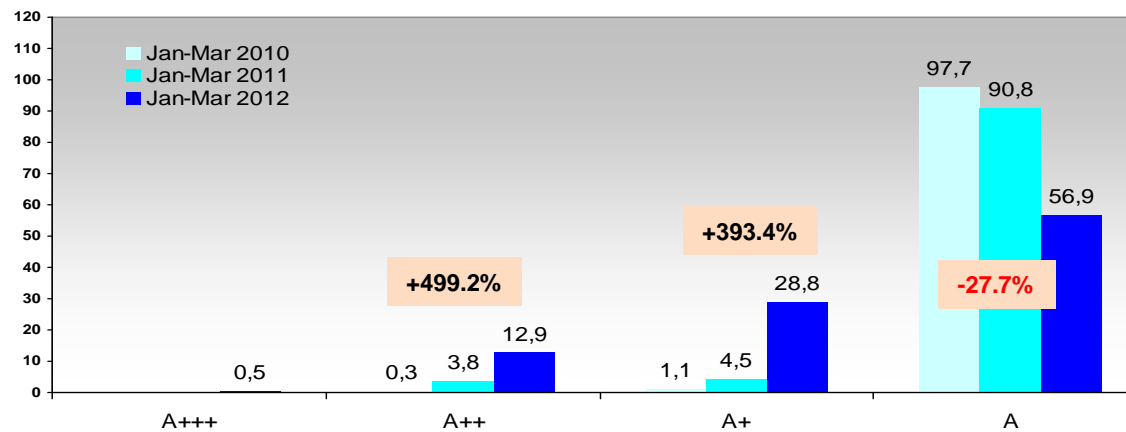


- Further improvement of energy efficiency
- Further reduction of water consumption (water recycling with tanks)
- Load and dirt sensing and automatic detergent dosing
- Cleaning Zones for differentiated loads
- Fast programs
- Advanced Auto programs and professional programs (glass – silver)
- New concepts for improved drying
- Importance of number of settings

Growth in Energy Efficient and High Capacity Dishwashers



Market % breakdown - Volume



Electrolux Dish Focus Areas



LESS ENERGY

ENERGY LABEL A+++

A+++ is the best class of energy labeling available.

INVERTER TECHNOLOGY

Lower noise, higher performance, less energy.

AUTOOPEN

Better drying using less energy, door opens automatically at the cycle end.

AUTOOFF

Lower energy consumption, with automatic switch off at end of cycle.



CAPACITY

LARGEST, MOST FLEXIBLE TUB

"Just put it all in"

PLACE SETTINGS

New innovations on the way.

SPEED

TIMESAVER

Reduced program time by approx. 50%.

FLEXIBILITY

XTRAPOWER

Professional cleaning results, even on the toughest dirt.

FLEXIWASH

Different temperature and pressure in upper and lower basket.

MYFAVOURITE

Set and memorize your favorite program. One touch to select it.

AUTOFLEX

Determines the time and temperature of the cycle, based on the soil level.

Conclusions



- Consumer and regulatory pressure on energy consumption and sustainability will continue
- Consumers will continue to request more capacity, performance, speed and flexibility at affordable cost
- Emerging trends in weight/dirt sensing and automatic detergent dosing, but unclear strength of consumer pull
- Further deepening of cooperation between equipment manufacturers and detergent manufacturers will be needed to face challenges and opportunities