



**BY THE
NUMBERS:**
The Home Appliance
Industry in Europe,
2019-2020

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Foreword



Dr Peter Götz,
APPLiA President

Europe and the world have been going through an unprecedented period brought by the COVID-19 pandemic, impacting on our lives at every level. Priorities had to be reshuffled to ensure that the safety and well being of our workers and their families came first. Nevertheless, our sector has worked tirelessly to make sure our commitment to a better and greener Europe was not put aside. This report sums up the outcome of our efforts as an industry and is another step in the right direction.











Paolo Falcioni,
APPLiA Director-General

This is the 5th edition of our home appliance industry annual report, once again depicting improving trends by the sector. Despite the period we have been going through, with all the difficulties that the pandemic has inflicted on European industries and citizens, we are glad to share some positive figures around the sector's ongoing commitment to work for a better future. That is something for which our companies work every day. This report is a deep look into sustainability, digitalisation and European competitiveness as fostered by the home appliance sector.



APPLiA Membership

APPLiA Direct Members

			B/S/H/
			dyson
			LIEBHERR
			SAMSUNG
			
			

National Associations



Meet the Secretariat



Paolo Falcioni
Director-General



Candice Franck
Office Manager



Candice Richaud
Corporate Issues
Manager



Anna Rossignoli
Communication
Specialist



Federica Lavoro
Communication
Junior Specialist



Korrina Hegarty
Environment
Policy Director



Lara Carrier
Environment & Chemicals
Policy Manager



Naomi Marc
Environment
Policy Specialist



Matteo Rambaldi
Energy
Policy Director



Giulia Zilla
Energy & Environment
Policy Manager



Luis Galiano
Energy
Policy Specialist



Michał Zakrzewski
Digital and
Competitiveness
Policy Director



Eoin Kelly
Digital and
Competitiveness
Policy Specialist



Yannick Lenaerts
Data Analytics
Specialist

The Home Appliance Industry of EU Member States + UK, in 2019



€ 71.101 M

Direct & indirect value
added to GDP



€ 53.656 M

Turnover in the EU



3.429

Number of enterprises
in the EU



210.791

Number of direct employees



927.480

Number of direct & indirect employees



€ 33.863*

Wages & salaries

*2018 data, per employee



Pillar 1

Sustainable Lifestyles

Sustainability and environment protection are priorities in Europe's transition to a climate-neutral region. APPLiA has been successfully contributing to this change, by pursuing the circularity of the industry and engaging with a wide variety of actors active in the challenge.

The home appliance industry continuously works to reduce the impact of production process, (2011-2018)



-12%

Reduction in waste generation during production



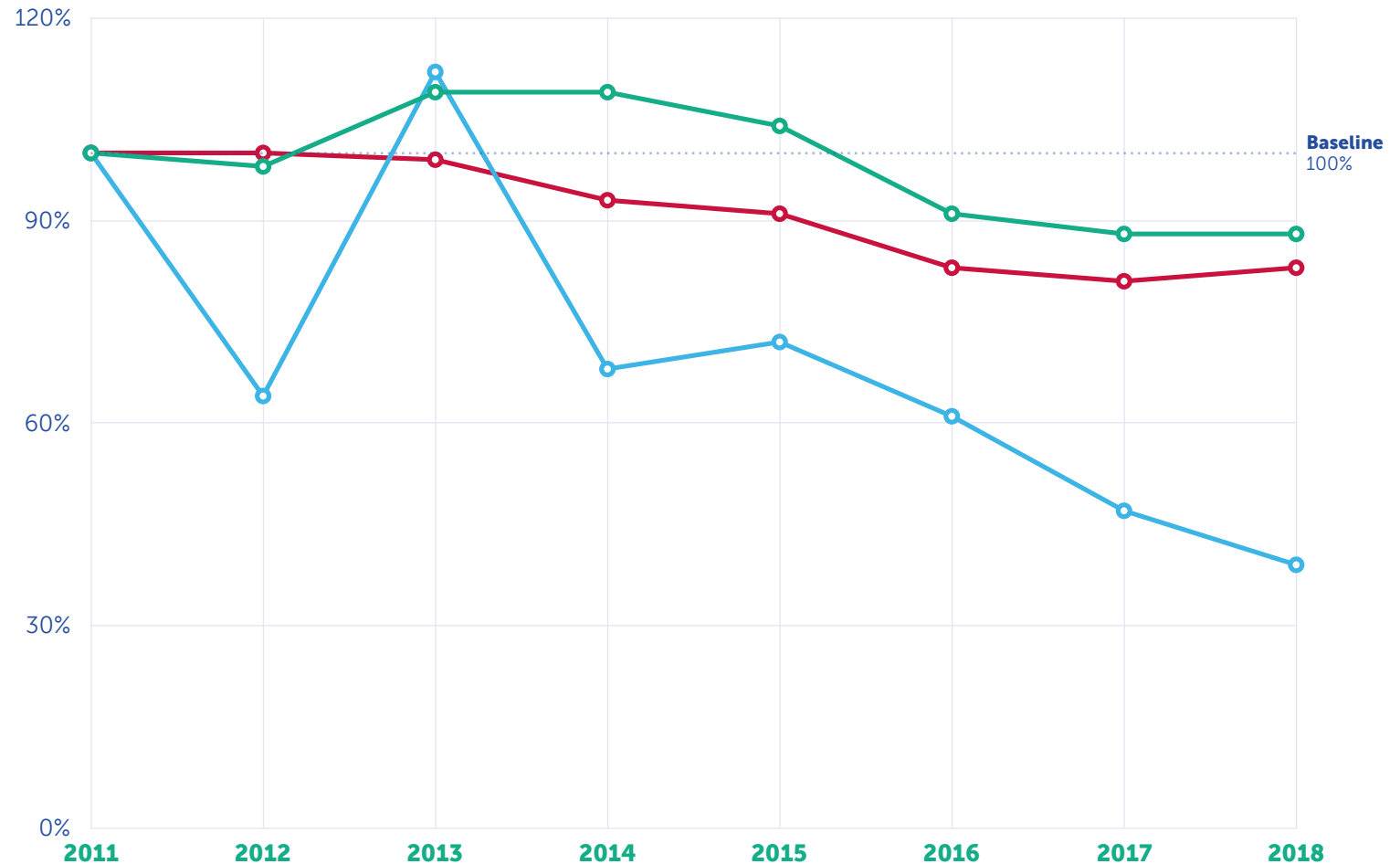
-61%

Reduction in water consumption during production



-17%

Reduction in energy consumption during production

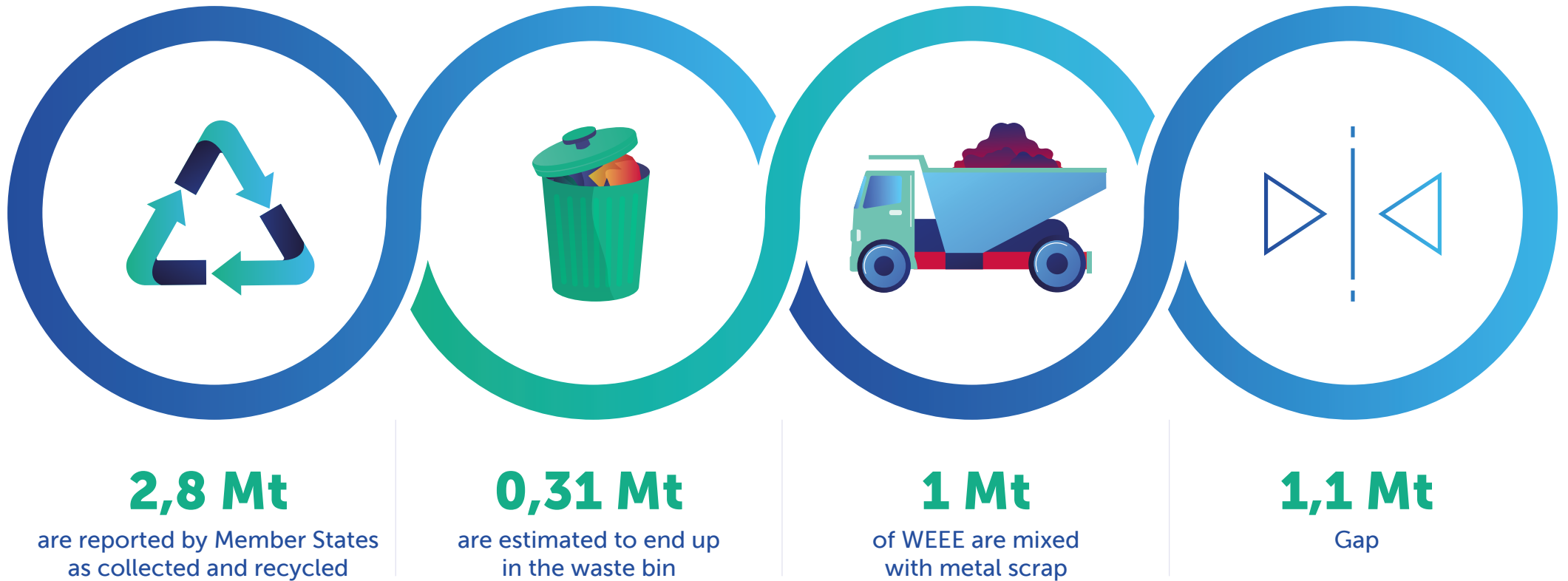


The home appliance industry continuously works to reduce the impact of production processes and particularly the consumption of energy and water as well as the reduction of waste during production processes. Benchmarking with the EU manufacturing industry shows that, in absolute consumption, the home appliance industry reduced the waste generated by 12% from 2011 to 2018. When looking at water consumption, it was reported a decrease of 61% from 2011 to 2018 due to a large improvement and changes in production in some of manufacturers' facilities. Finally, the energy consumption is reduced by 17% showing a positive trend.

Source: Sofies calculations based on APPLiA Members data

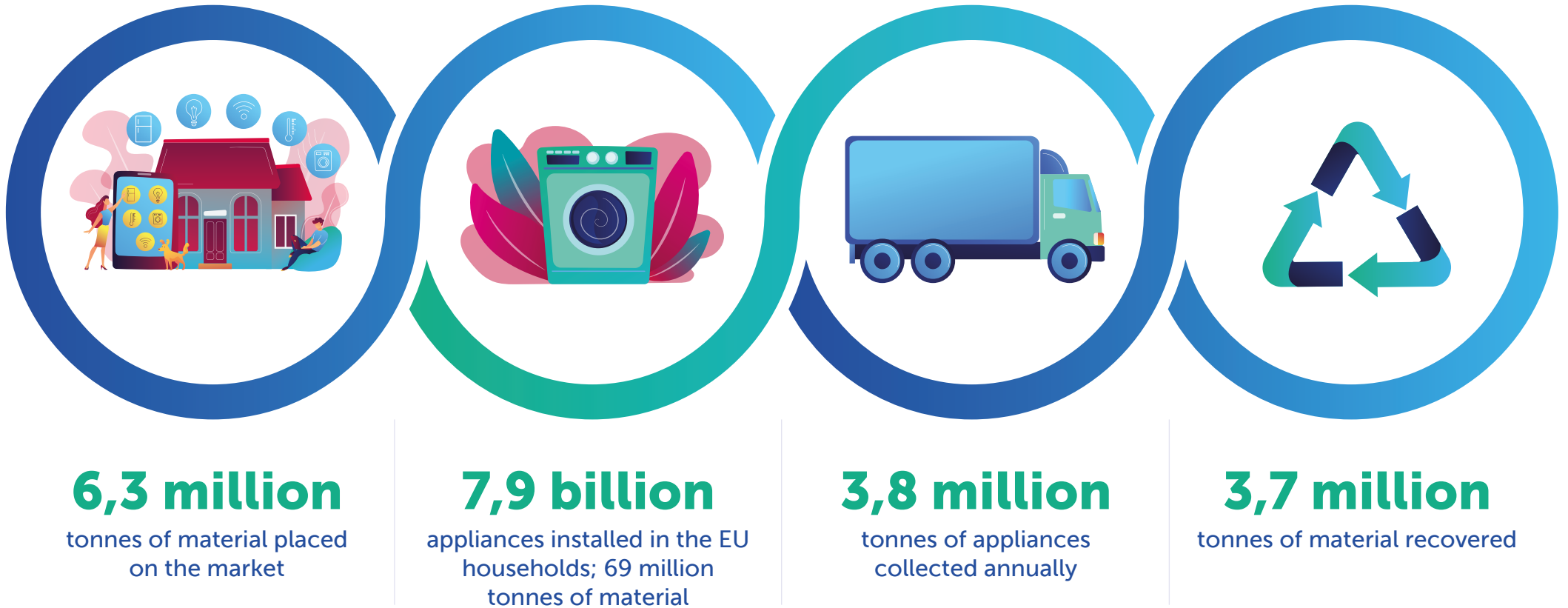


Waste of Electrical and Electronic Equipment (WEEE) in Europe



Source: Sofies calculations based on Eurostat data, collection rate based on Eurostat data, waste bin and complementary flows on Prosum data and Ecotic study, quantities of WEEE generated based on apparent consumption methodology

The circularity of the material flows of the home appliance industry



Source: Sofies

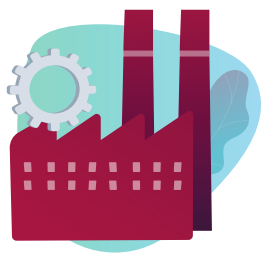
When it comes to repair, #DontDespair



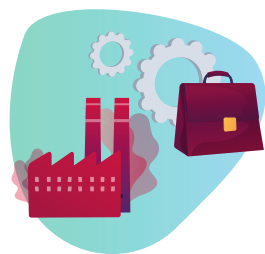
205 M
units placed on the
market in 2018



91%
of the requests
actually repaired



€1,9 bn
industry turnover
for repair & service



29.000
business partners in repair
and after-sale services

Costs

Spare parts

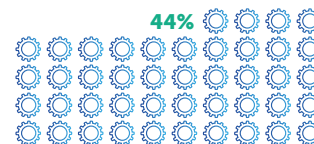
Labour

Transport

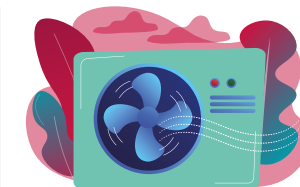
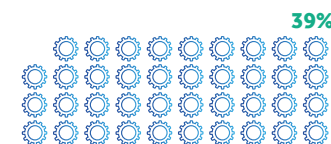
Other



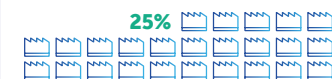
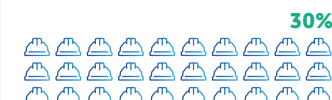
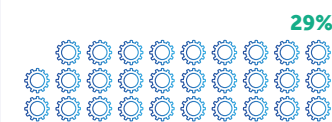
Small appliances



Large appliances



Cooling & Freezing

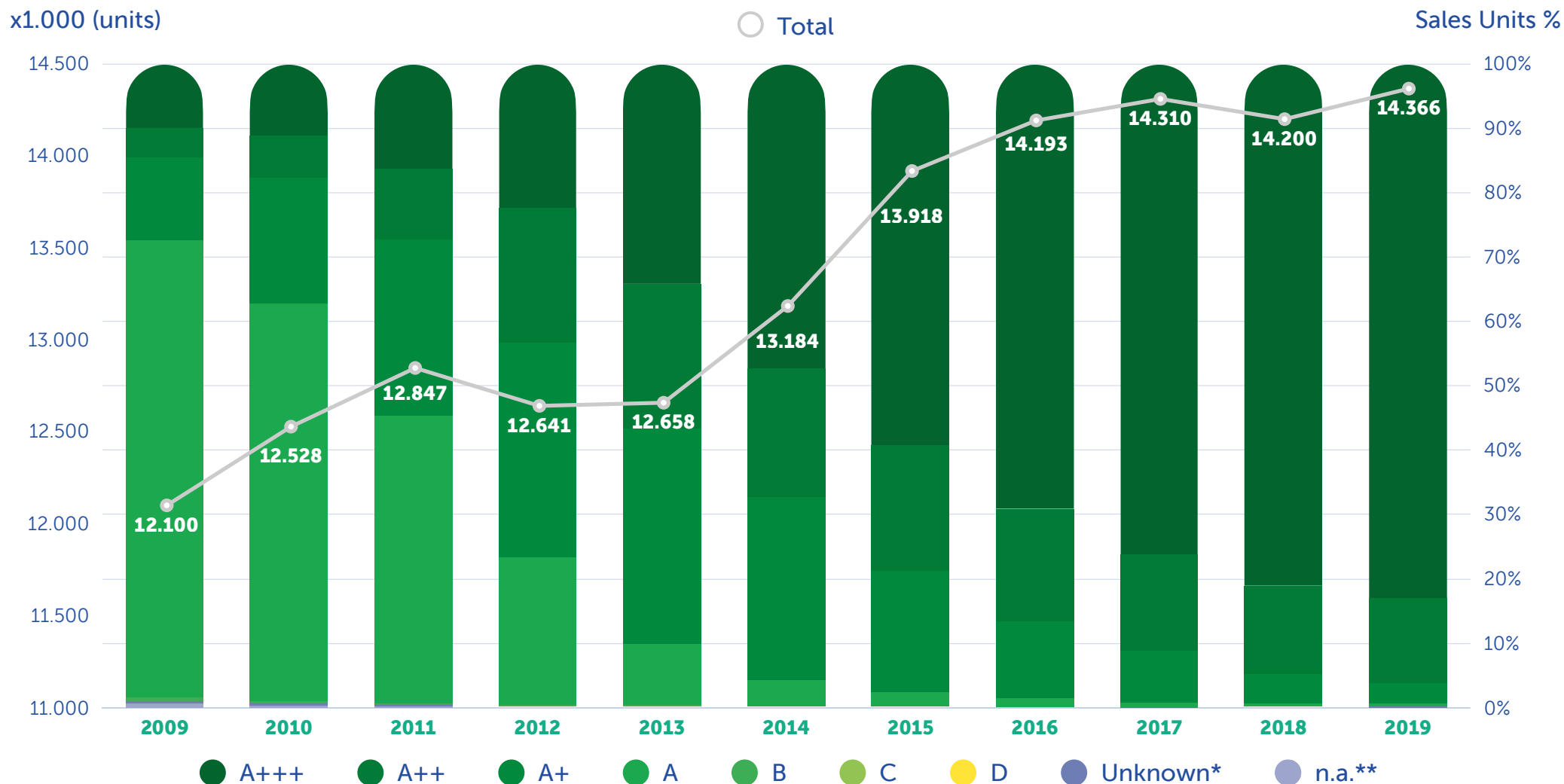


According to data collected from APPLiA's membership, 91% of the requests to manufacturers for a repair of a product resulted in an actual repair in 2018. Breaking down the cost for repair activities, for large appliances for instance, the biggest chunk is the labour cost, representing 44%; 39% of the average price for a repair is the cost of the spare parts; 16% goes to transport and 1% are listed as other costs.

As an observation, nearly 50% of the cost is linked to the work behind the repair and it is not surprising because around 29.000 business partners are directly or indirectly linked to repair activities and services. Manufacturers already provide repair parts, documentation and software to repair services that are authorised to undertake repairs in a safe manner and securing the quality of repair and future safe operation of the appliances at the customer's continued use of appliances and, in general, there is no shortage of spare parts.

Source: Sofies calculations based on APPLiA Members data

Energy efficiency in Europe for washing machines, 2009-2019

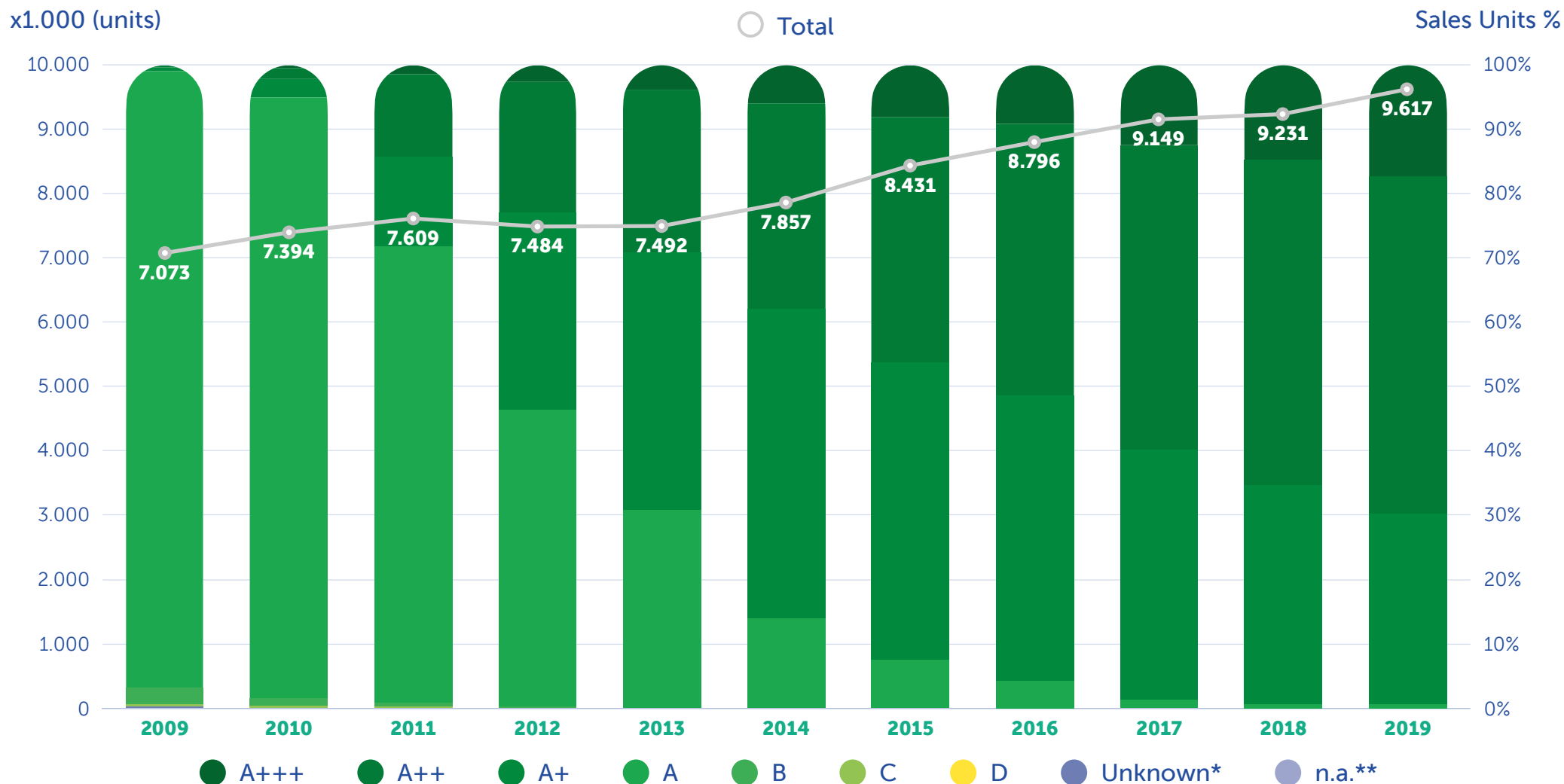


Unidentified during the time of coding*
Not applicable**

Note: in 2019, 68,8% of the washing machines sold were A+++, whereas it was only 8,2% in 2009. The countries included in the data collection are Austria, Belgium, Croatia, Czech Republic, Denmark, Finland, France, Germany, Great Britain, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden.

Source: GfK

Energy efficiency in Europe for dishwashers, 2009-2019

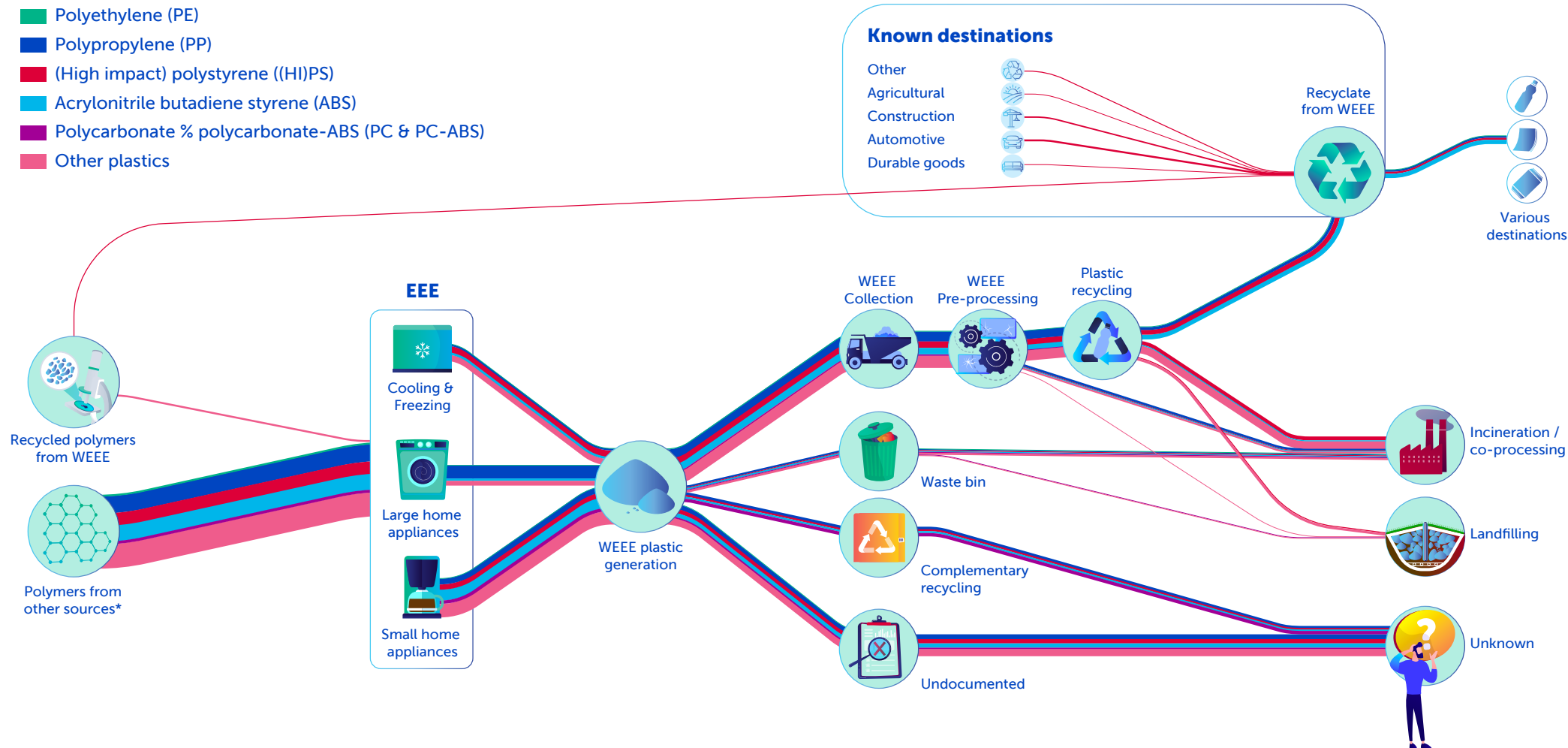


Unidentified during the time of coding*
Not applicable**

Note: in 2019, 99.4% of the dishwashers sold have an energy label of A+++, A++ or A+. The countries included in the data collection are Austria, Belgium, Croatia, Czech Republic, Denmark, Finland, France, Germany, Great Britain, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden.

Source: GfK

Plastic flows from home appliances



*Polymers from other sources include virgin plastics as well as recycled plastics from other sources than WEEE e.g. Packaging.

Source: Sofies



Pillar 2

Living the Connected Home

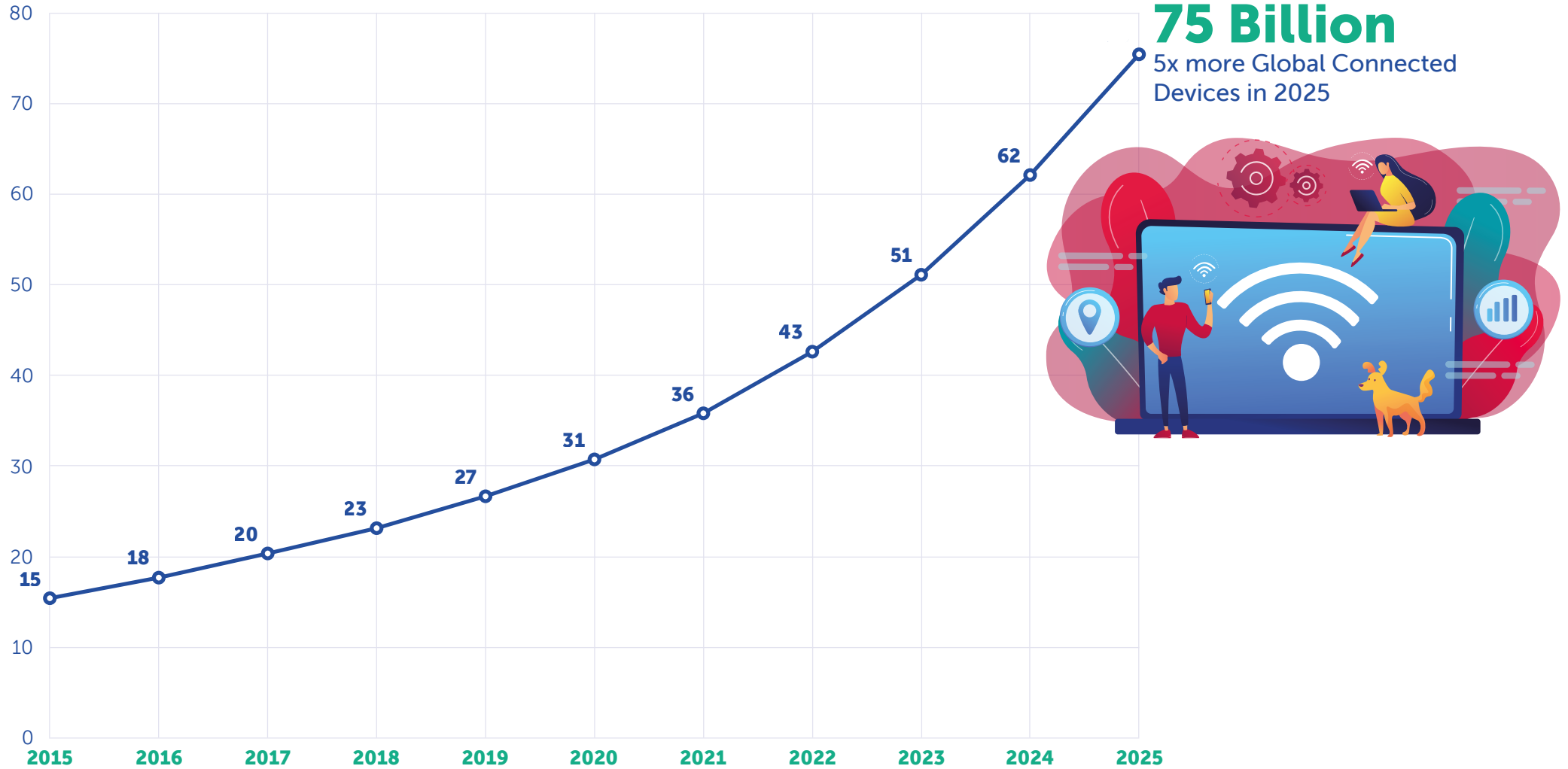
Digitalisation is shaping the future of Europe and of its citizens. The number of smart homes is constantly growing and consumers recognise both an advantage in using connected appliances and a potential for making their lives easier. 31 million Europeans will be using smart appliances in 2024.



Internet of things - connected devices installed globally, from 2015-2025



In billions

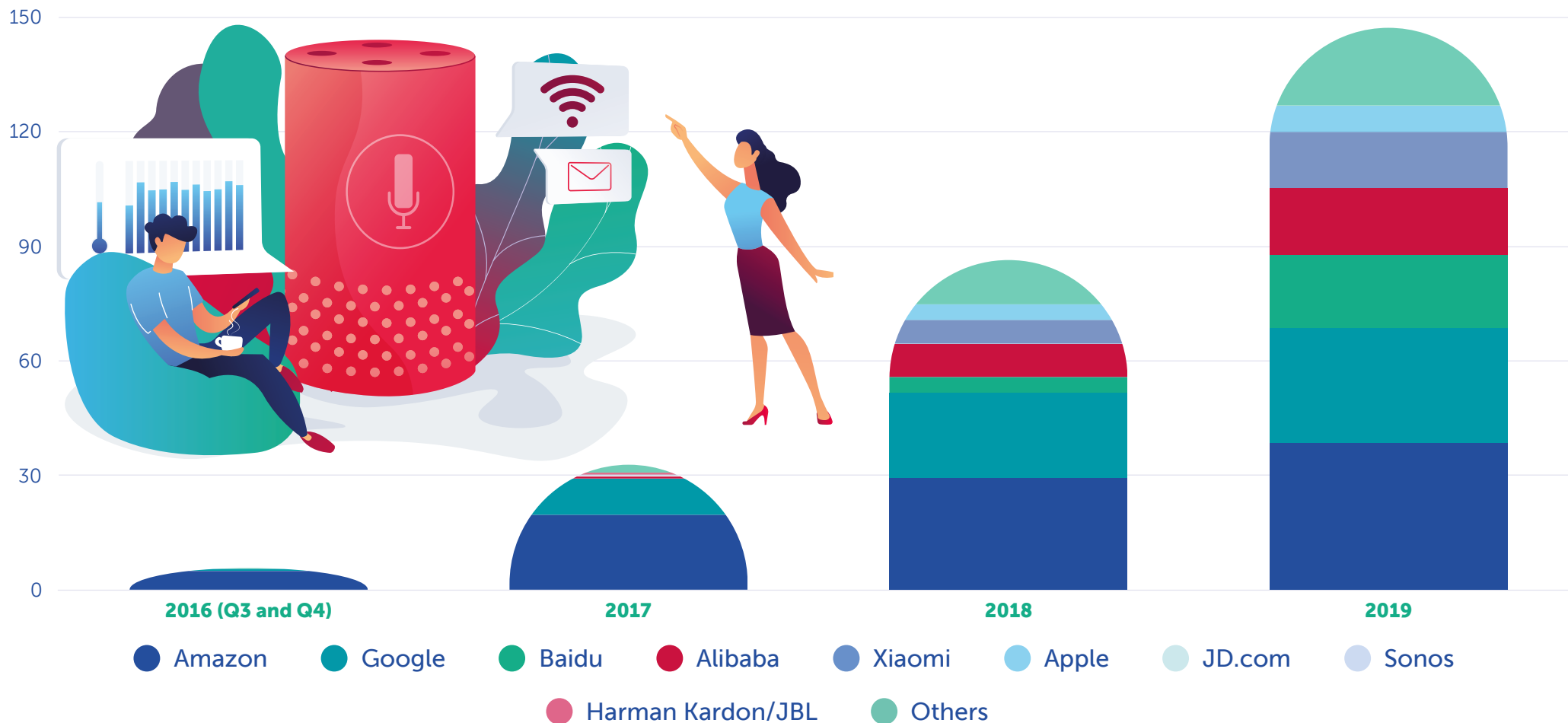


Source: IHS, Forbes

Shipments of smart speaker with intelligent personal assistant worldwide, from 2016 to 2019



In millions

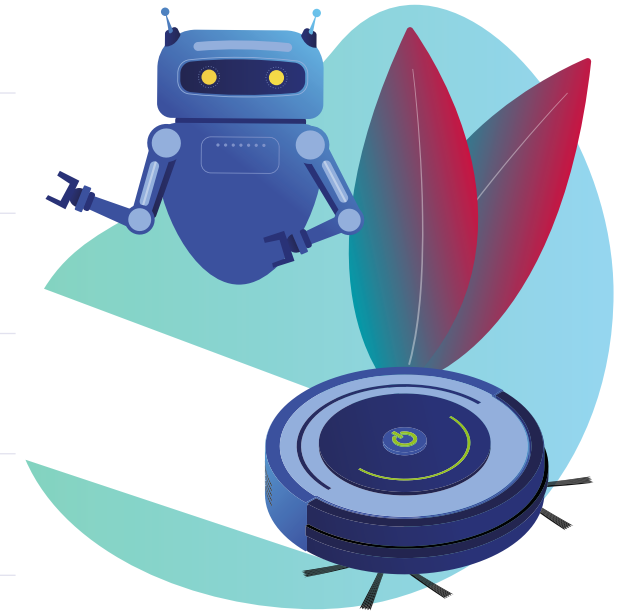
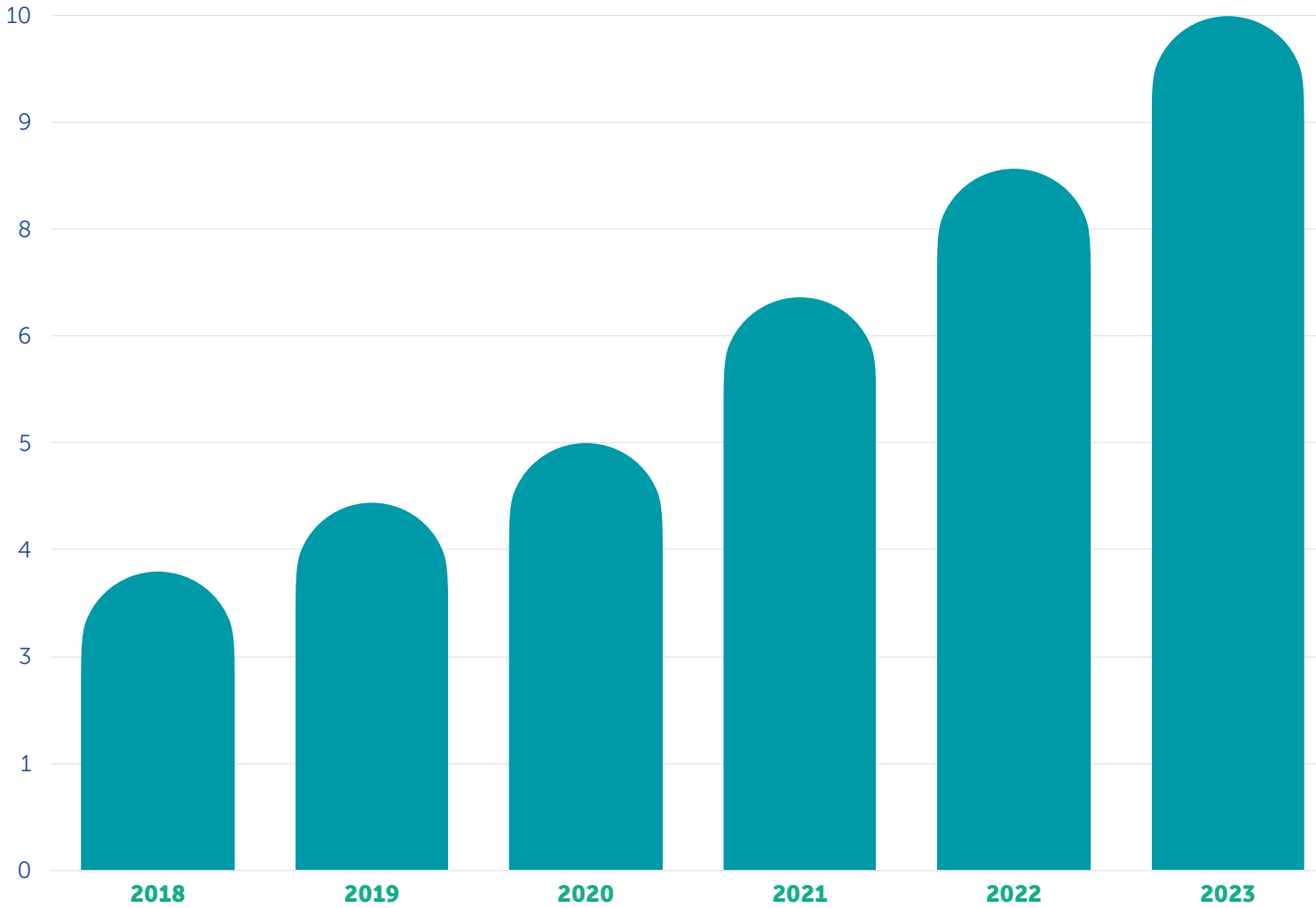


In the fourth quarter of 2019, 55.9 million smart speakers were shipped worldwide confirming an important increase in the demand for this type of device. Smart speakers with an integrated virtual assistance can carry out tasks based on users' voice command and provide control over smart home functions.

Source: Statista

Sales value of service robots for domestic use worldwide from 2018 to 2023

In billion U.S. dollars



Source: Eurostat

Energy consumption in households, for the main energy products, in Europe, in 2018



64,1%
Space heating

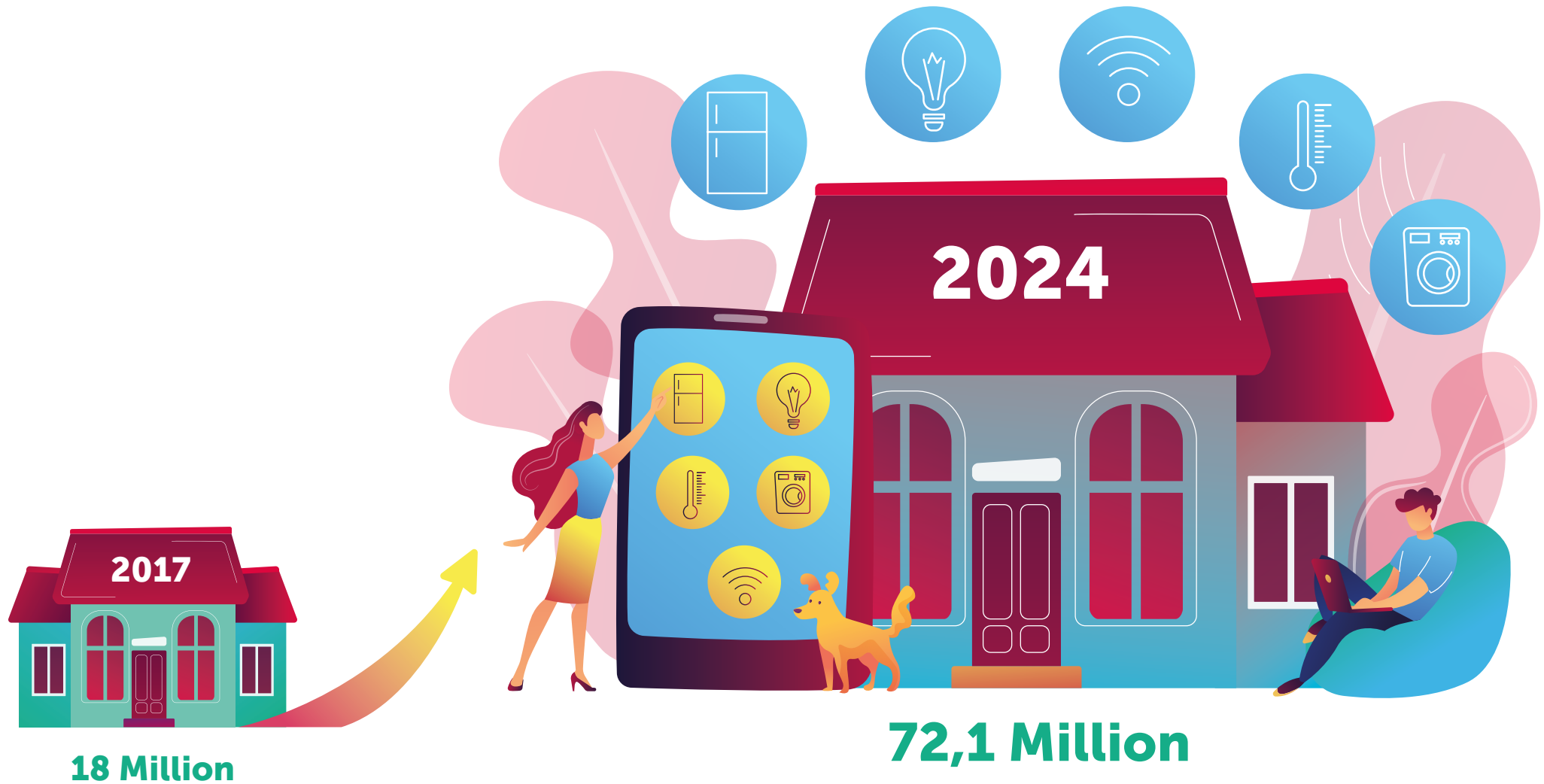
14,8%
Water heating

14,4%
Lighting and
appliances

5,6%
Cooking

0,3%
Space cooling

Total number of Smart Homes, in Europe

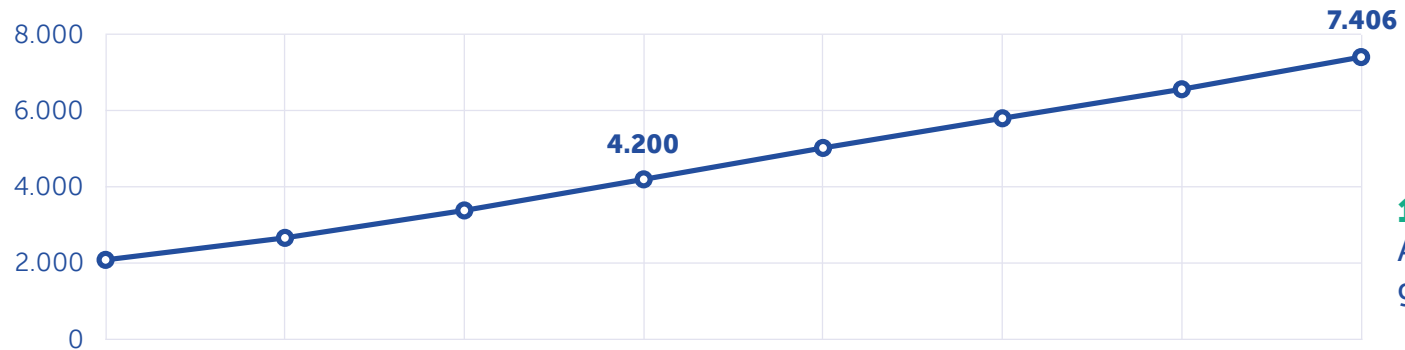


Source: Statista

Smart appliances in Europe

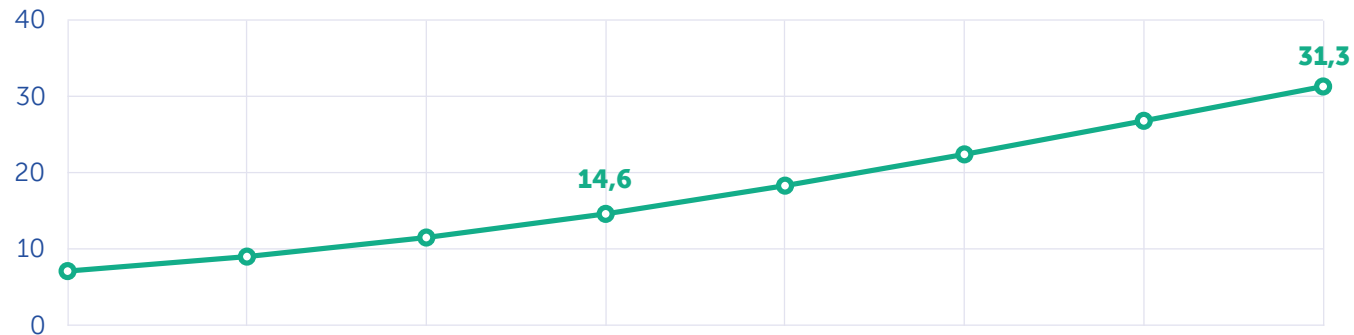
Revenue of smart appliances in Europe

in million euros



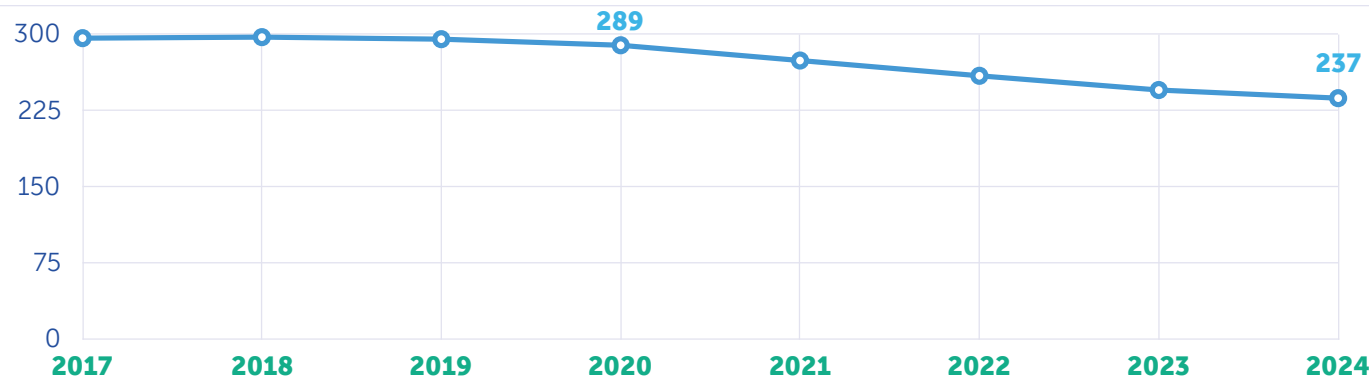
Users of smart appliances in Europe

in million users



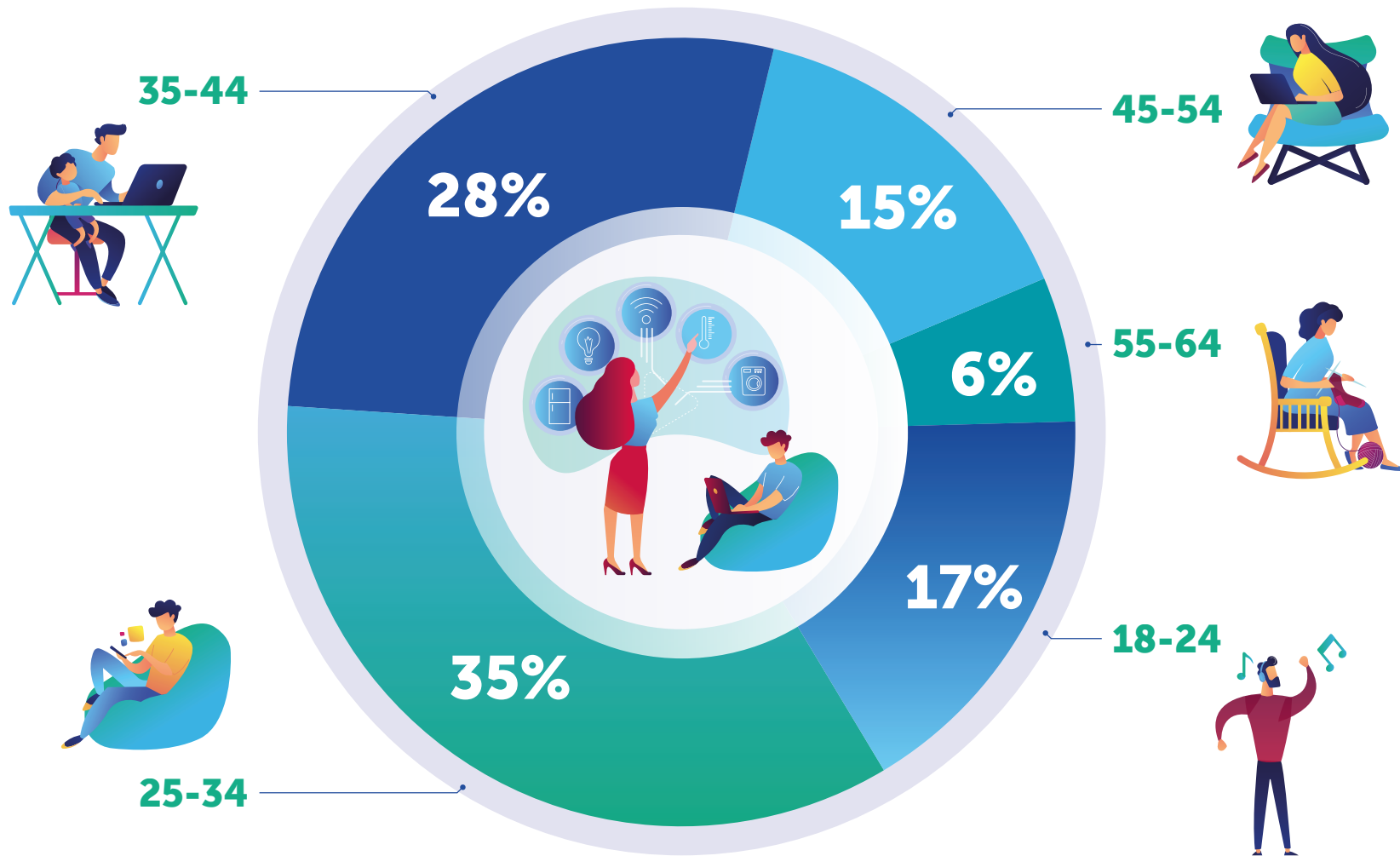
Average revenue per user, in Europe

in million euros



Source: Statista

Users of smart appliances by age



Considering the use of smart appliances, those between 25 and 44 years constitute the vast majority of the used in 2018 with 63%. On the other side, only 17% of the 18-24 years and 15% of the 45-64 years are using smart appliances in 2018.

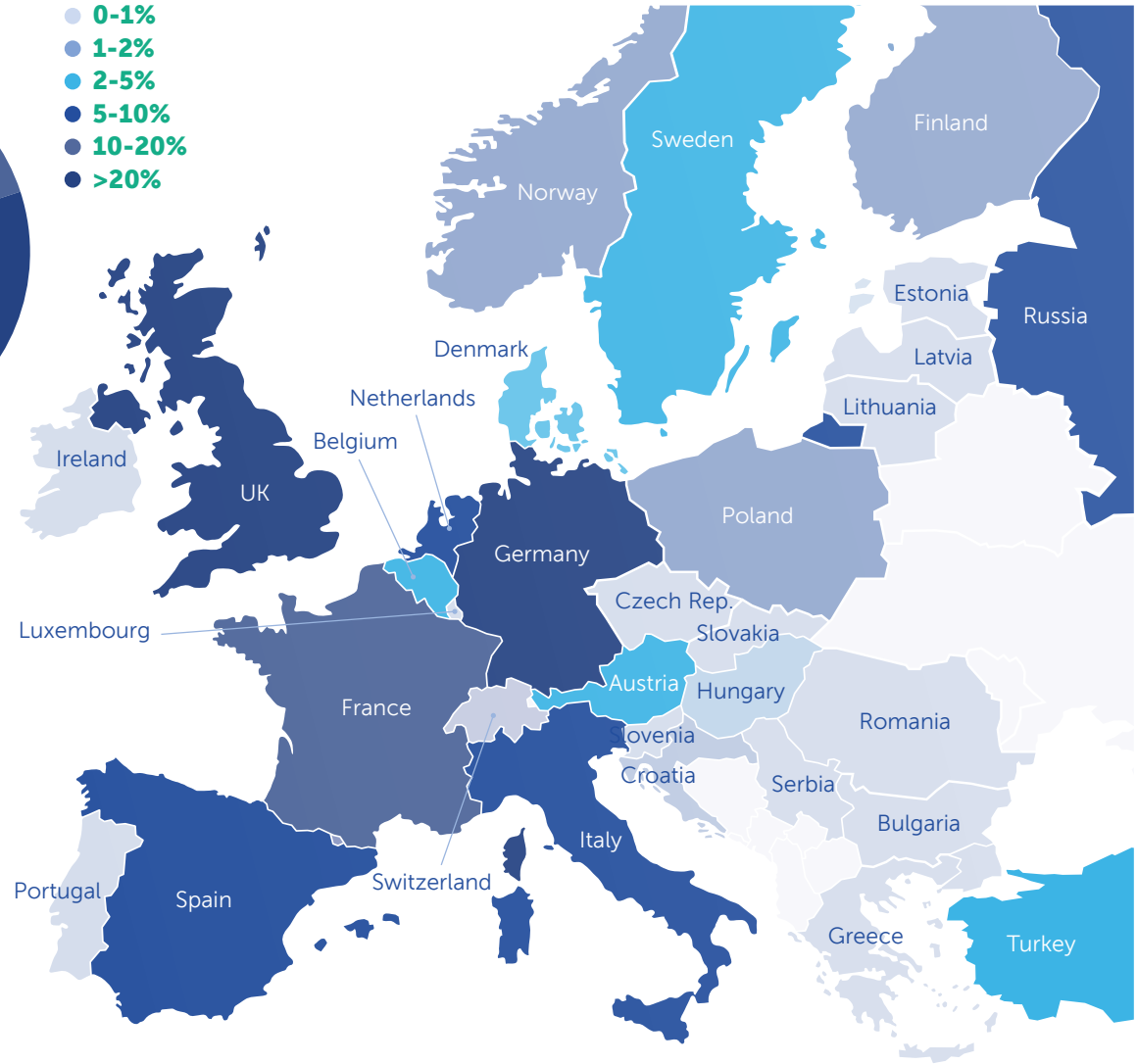
Source: Statista

Revenue of smart appliances in Europe

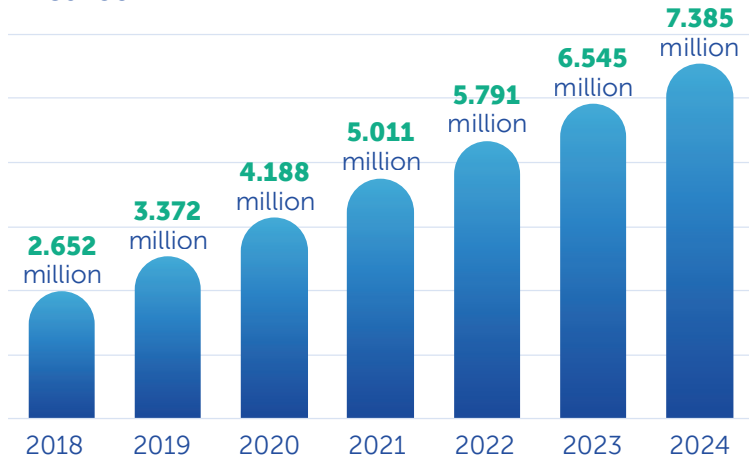
Country	%
Austria	2
Belgium	2,4
Bulgaria	0,2
Croatia	0,3
Czech Rep.	0,7
Denmark	2,1
Estonia	0,2
Finland	1,4
France	10,7
Germany	22,2
Greece	0,3
Hungary	0,4
Ireland	0,5
Italy	6,5
Latvia	0,1
Lithuania	0,2
Luxembourg	0,1
Netherlands	5,3
Norway	1,9
Poland	1,5
Portugal	0,7
Romania	0,7
Russia	5,1
Serbia	0,2
Slovakia	0,3
Slovenia	0,1
Spain	5,3
Sweden	3,6
Switzerland	1,9
Turkey	2
UK	21,2



- 0-1%
- 1-2%
- 2-5%
- 5-10%
- 10-20%
- >20%



In euros



Source: Statista



Research & Development expenditure by EU countries, in 2019



Total:
€ 204.142 Million

Source: Eurostat, R&D related to the business sector

Slovakia	426 M	0,21%
Luxembourg	382 M	0,19%
Bulgaria	344 M	0,17%
Croatia	294 M	0,14%
Estonia	242 M	0,12%
Lithuania	210 M	0,10%
Cyprus	57 M	0,03%
Latvia	51 M	0,03%
Malta	49 M	0,02%



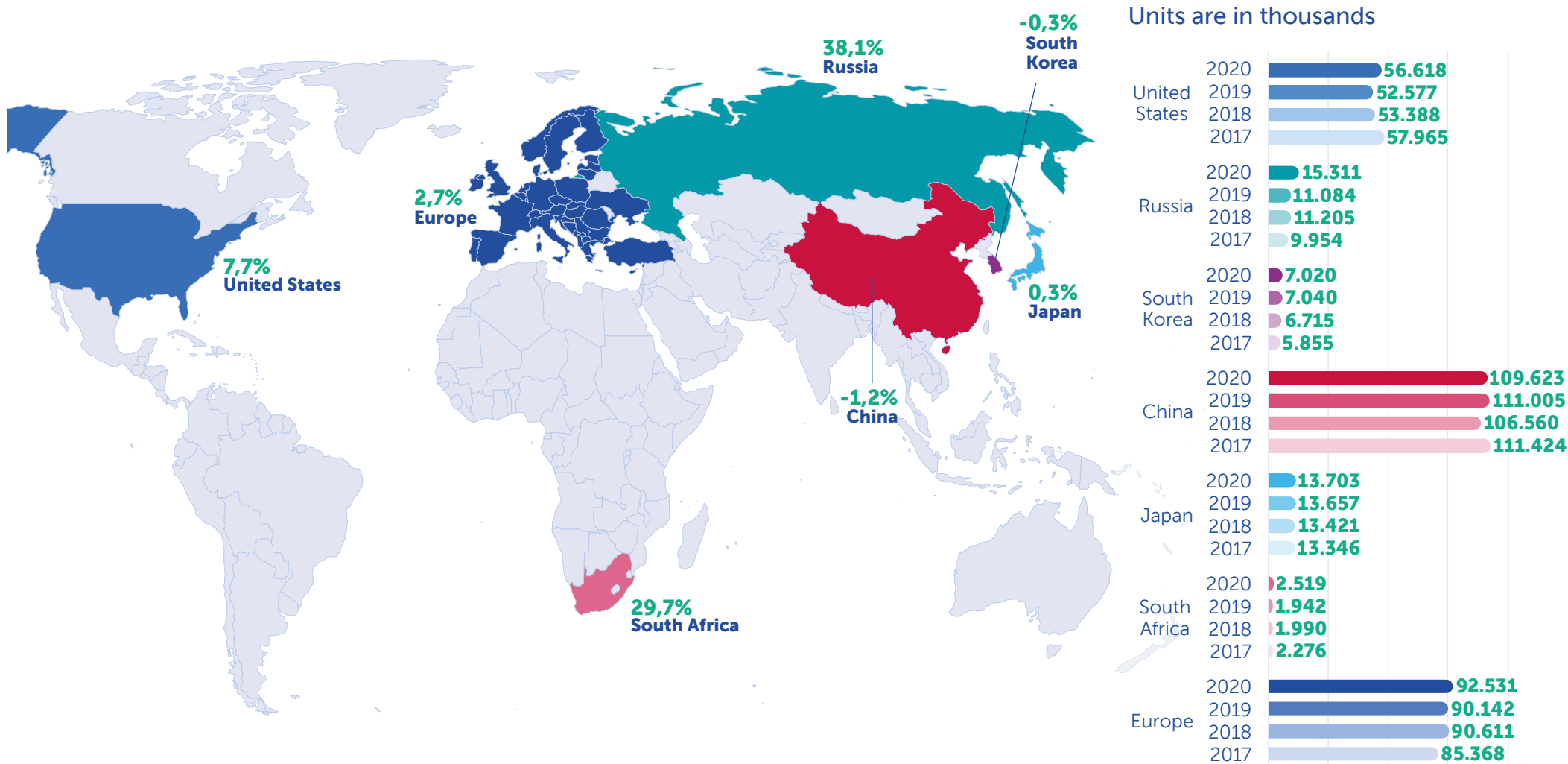
Pillar 3

Accelerating Europe's Growth

Our industry thrives in a system based on free and fair trade, both among the EU's Member States and with third countries.



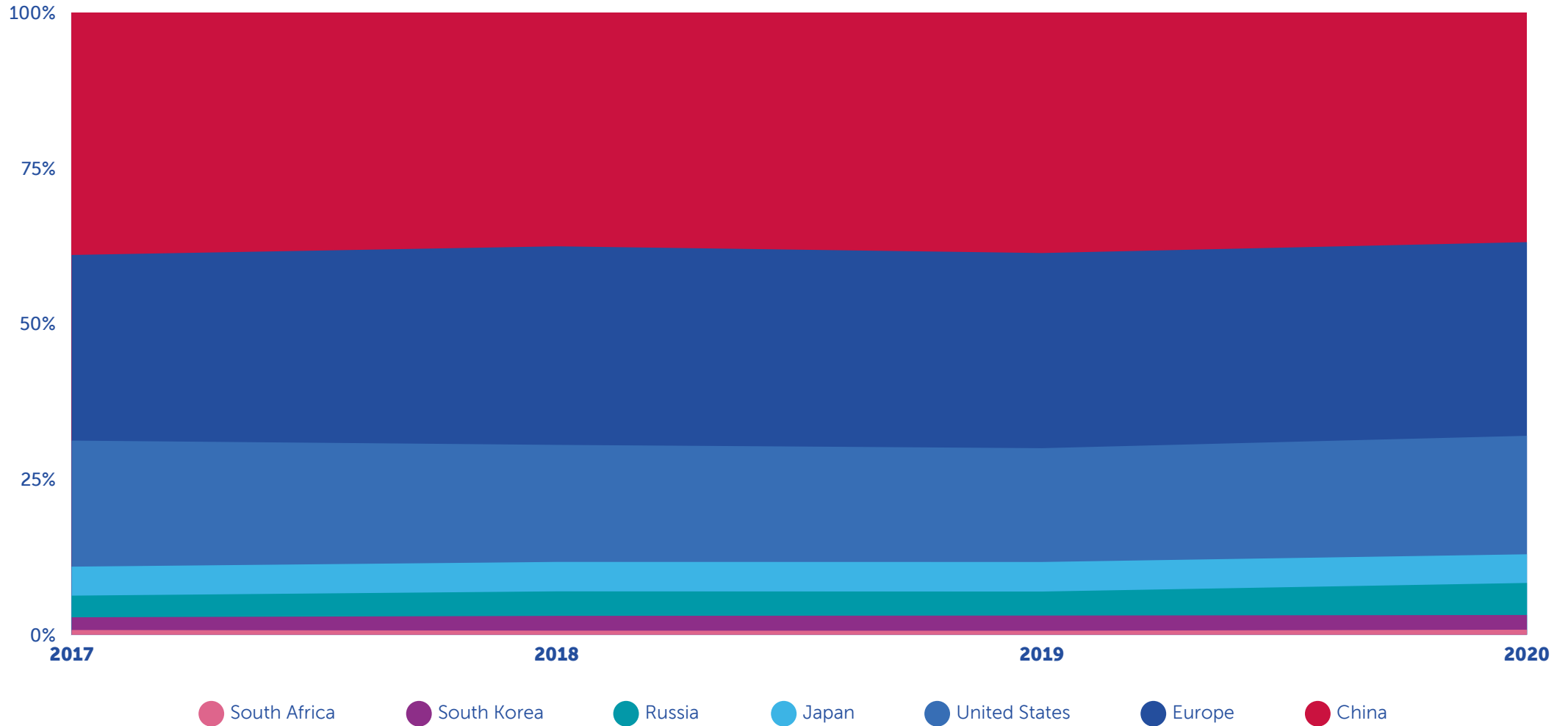
Units traded globally, % growth in 2020



MDA7 product groups shown in graph include: fridges, freezers, dishwashers, washing machines, tumble dryers, hoods, microwave ovens.

Source: International Roundtable of Household Appliance Manufacturer Associations (IRHMA)

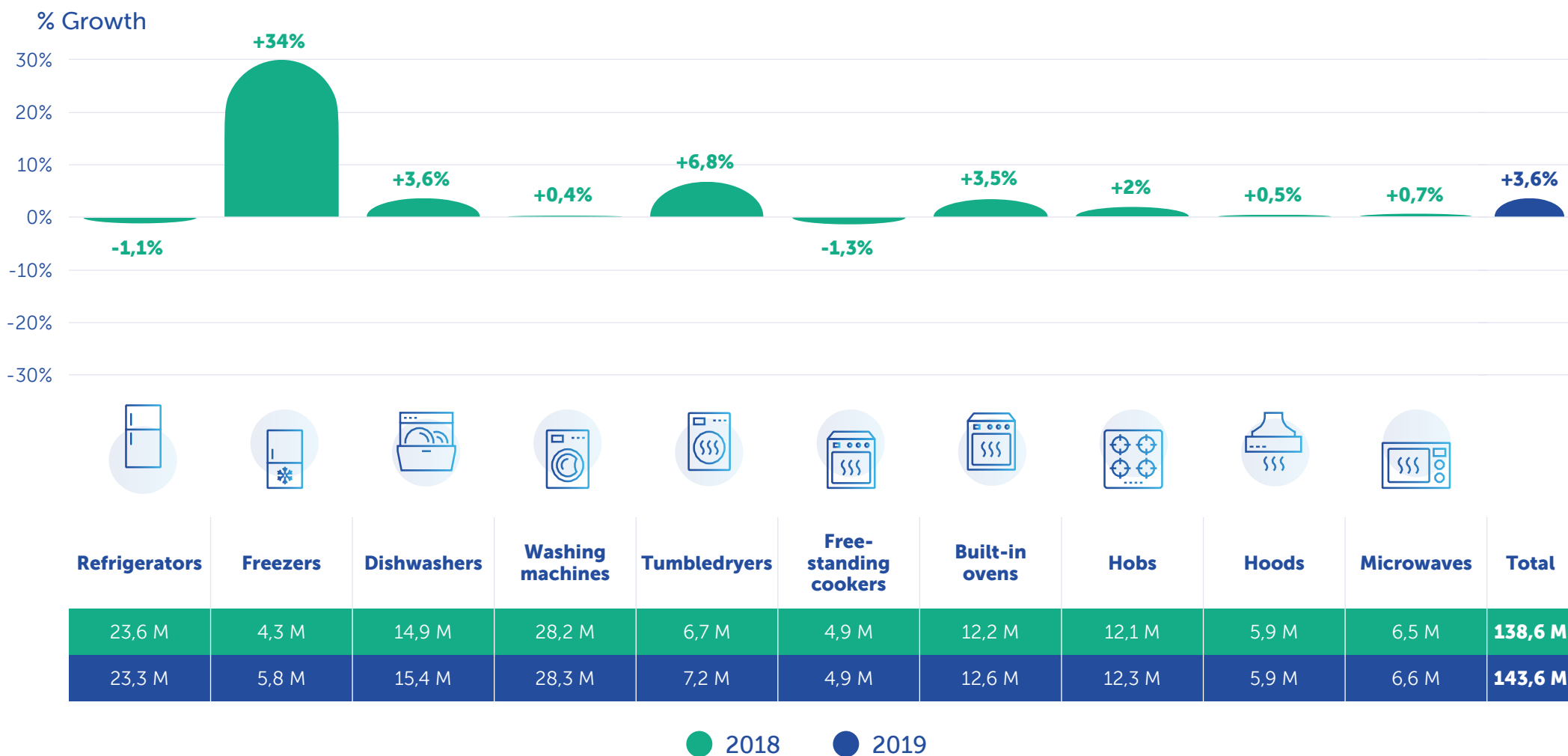
Units traded globally, % share by geographical area



MDA7 product groups shown in graph include: fridges, freezers, dishwashers, washing machines, tumble dryers, hoods, microwave ovens.

Source: International Roundtable of Household Appliance Manufacturer Associations (IRHMA)

Units traded in Europe, in 2019-2020 – large home appliances



MDA10 product groups shown in graph include: refrigerators, freezers, dishwashers, washing machines, tumble dryers, freestanding cookers, built-in ovens, hobs, hoods, microwaves. Countries that are included in the calculations are EU28 + Albania, Bosnia, Serbia, Montenegro, Ukraine, Russia, Turkey and Norway.

Source: APPLiA Membership

Units traded in Europe, in 2018-2019 – small home appliances

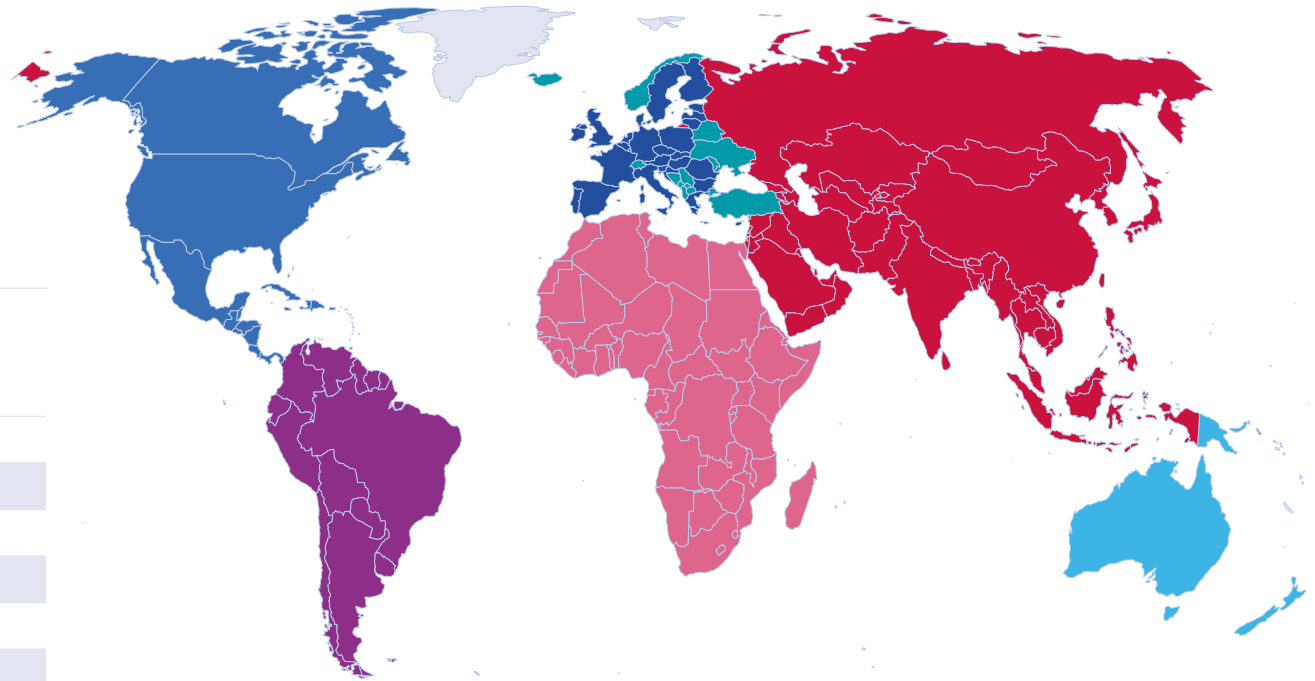


SDA product groups shown in graph include: Vacuum cleaners, food preparation and beverage and personal care appliances. Countries that are included in the calculations are EU28 + Albania, Bosnia, Serbia, Montenegro, Ukraine, Russia, Turkey and Norway.

Source: APPLiA Membership



EU exports of large home appliances, by continent, in 2019

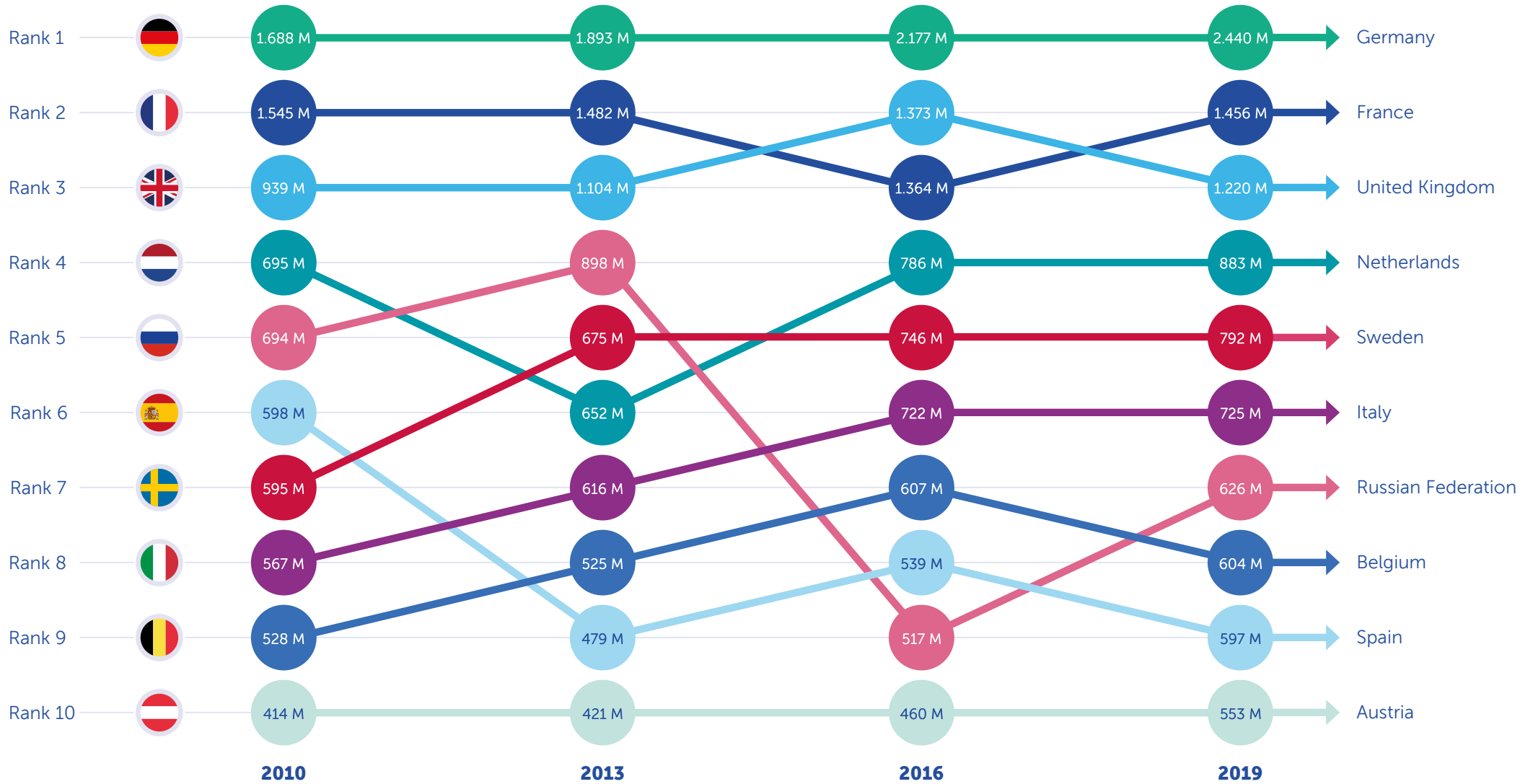


Area	Exports MDA10	% Share
● EU28	€ 12.536 M	74,8%
● Rest of Europe	€ 1.885 M	11,2%
● Asia	€ 1.092 M	6,5%
● North America	€ 592 M	3,5%
● Africa	€ 251 M	1,5%
● Oceania	€ 342 M	2,0%
● South America	€ 68 M	0,4%

Value market share in 2019. MDA10 include refrigerators, freezers, dishwashers, washing machines, tumble dryers, free-standing cookers, built-in ovens, hobs, hoods and microwaves.

Source: Eurostat

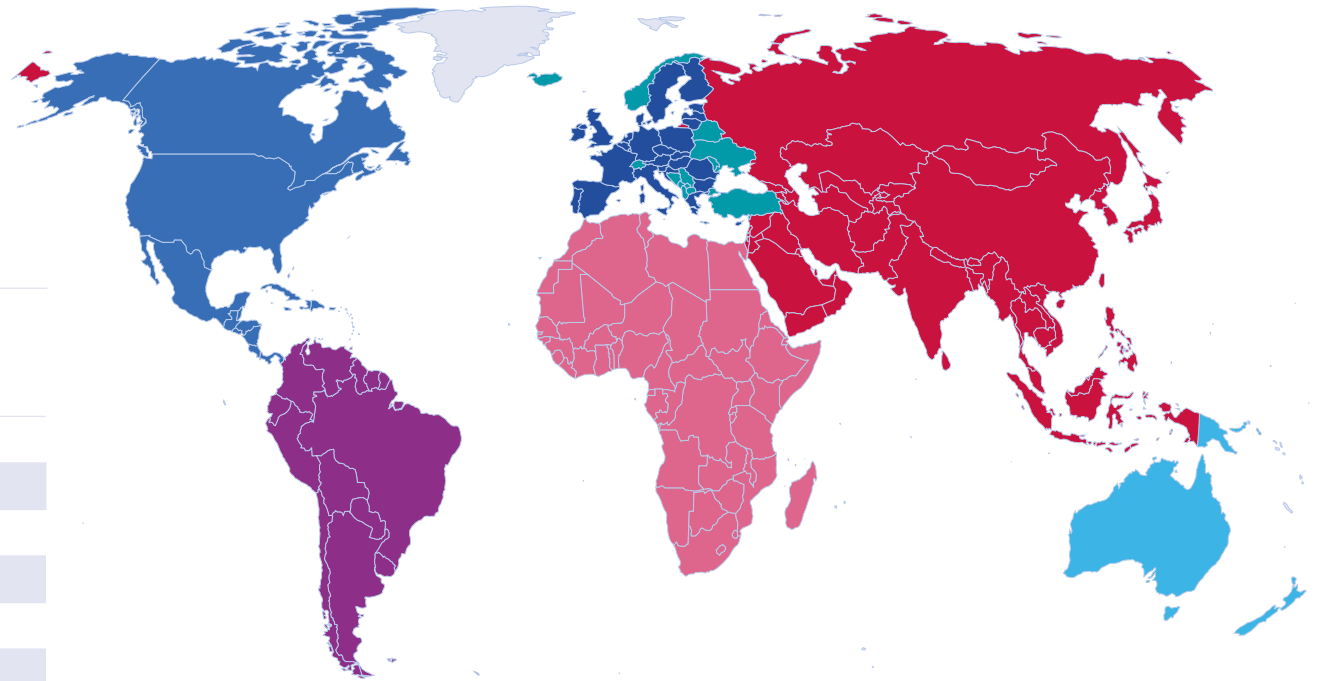
Top 10 EU export destinations for large home appliances, throughout the years



Source: Eurostat



EU exports of small home appliances, by continent, in 2019

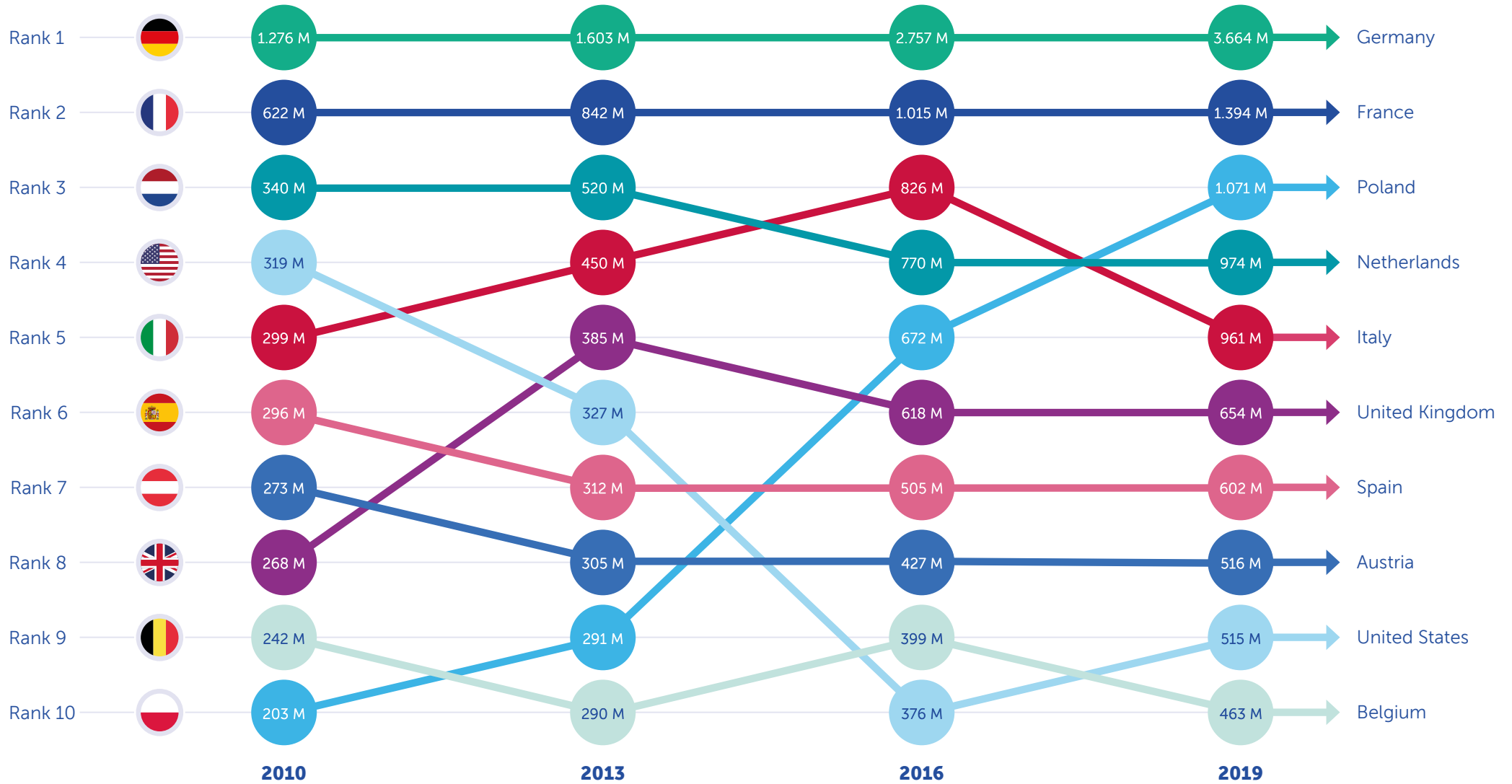


Area	Exports SDA	% Share
● EU28	€ 13.294 M	80,5%
● Rest of Europe	€ 1.148 M	7,0%
● Asia	€ 1.117 M	6,8%
● North America	€ 611 M	3,7%
● Africa	€ 152 M	0,9%
● Oceania	€ 128 M	0,8%
● South America	€ 56 M	0,3%

Value market share in 2019. SDA include vacuum cleaners, appliances for food and beverage preparation and personal care appliances.

Source: Eurostat

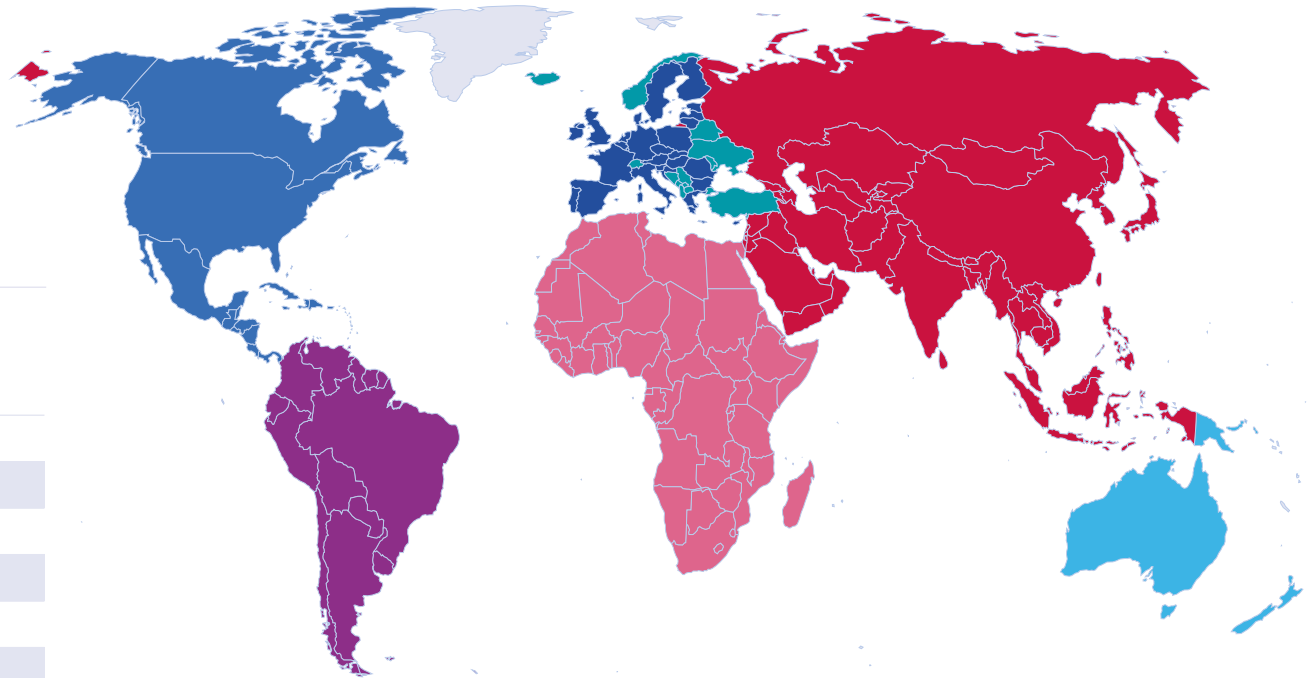
Top 10 EU export destinations for small home appliances, throughout the years



Source: Eurostat



EU imports of large home appliances, by continent, in 2019

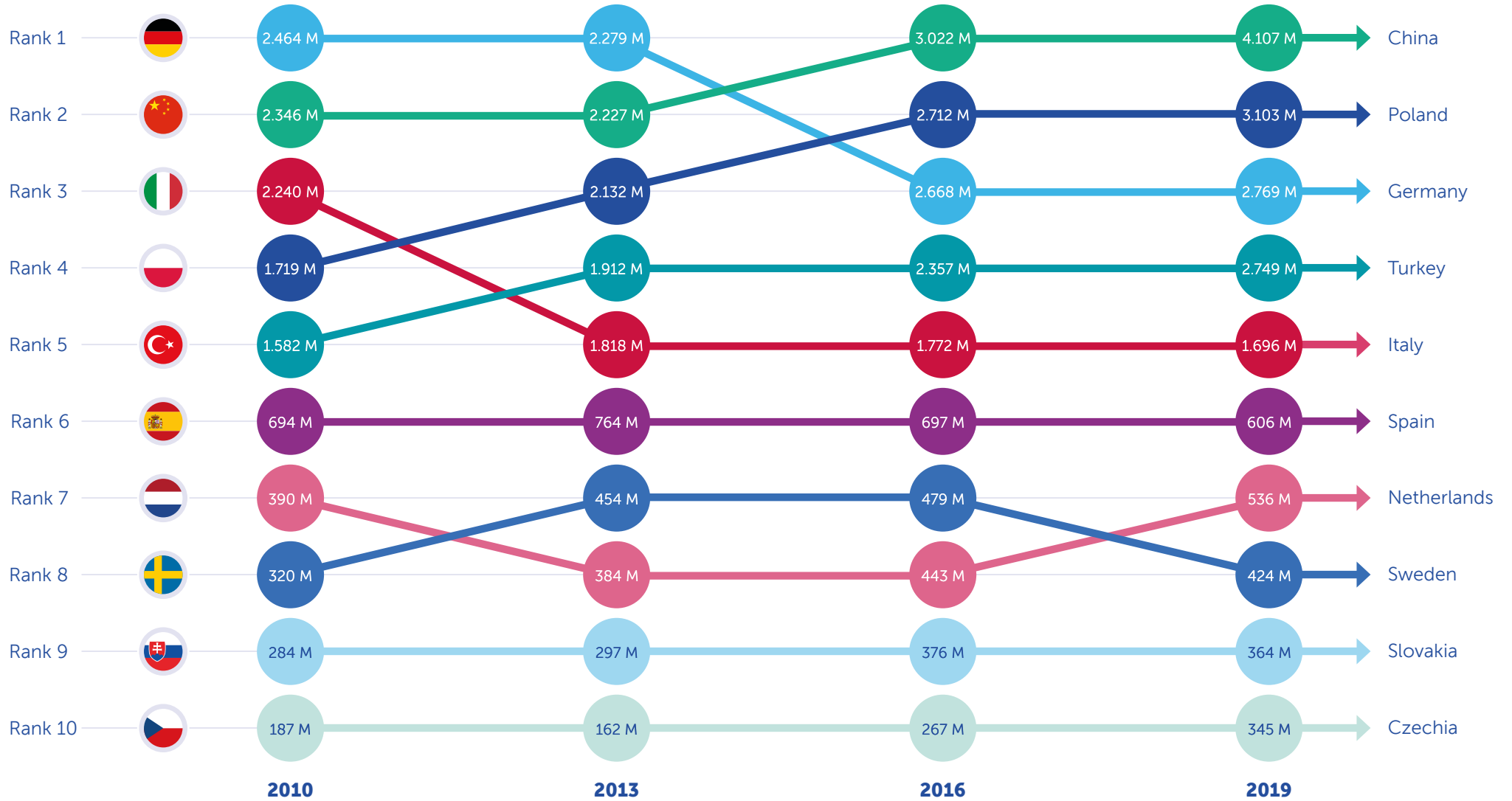


Area	Imports MDA10	% Share
● EU28	€ 12.300 M	61,4%
● Asia	€ 7.371 M	36,8%
● Rest of Europe	€ 255 M	1,3%
● North America	€ 65 M	0,3%
● Africa	€ 26 M	0,1%
● Oceania	€ 1,5 M	0,01%
● South America	€ 0,6 M	0,003%

Value market share in 2019. MDA10 include refrigerators, freezers, dishwashers, washing machines, tumble dryers, free-standing cookers, built-in ovens, hobs, hoods and microwaves.

Source: Eurostat

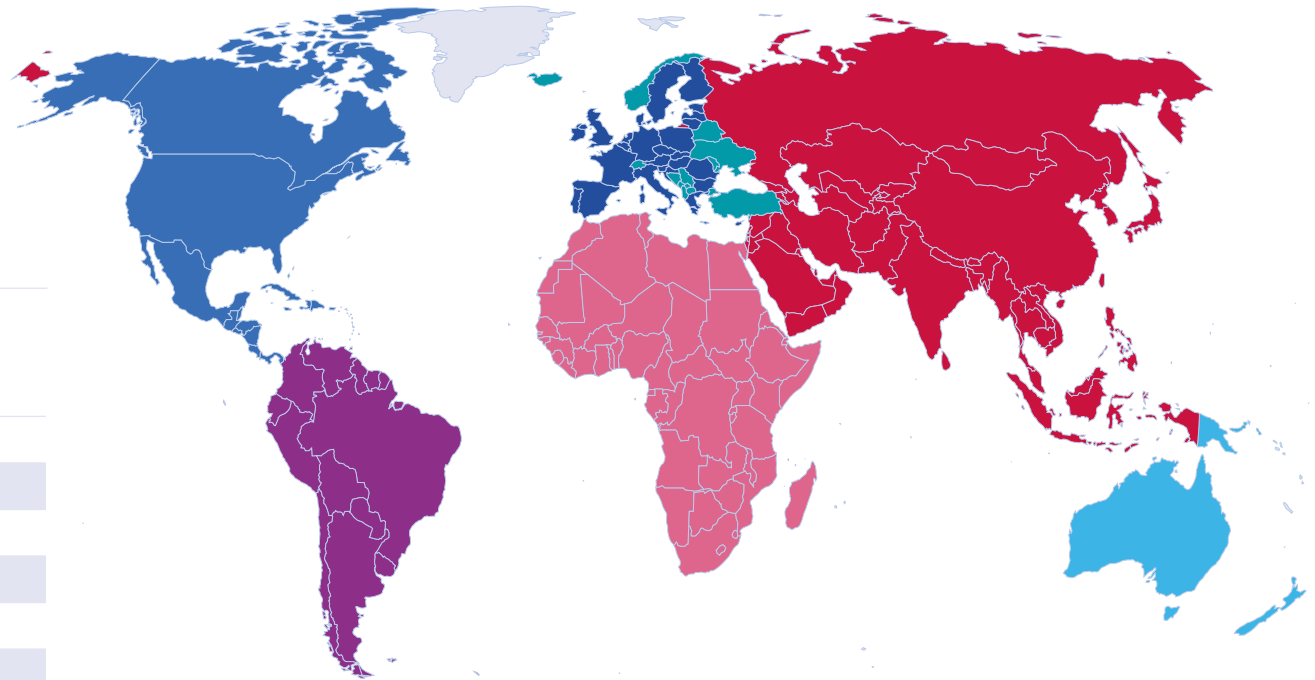
Top 10 countries of origin for large home appliances, throughout the years



Source: Eurostat



EU imports of small home appliances, by continent, in 2019

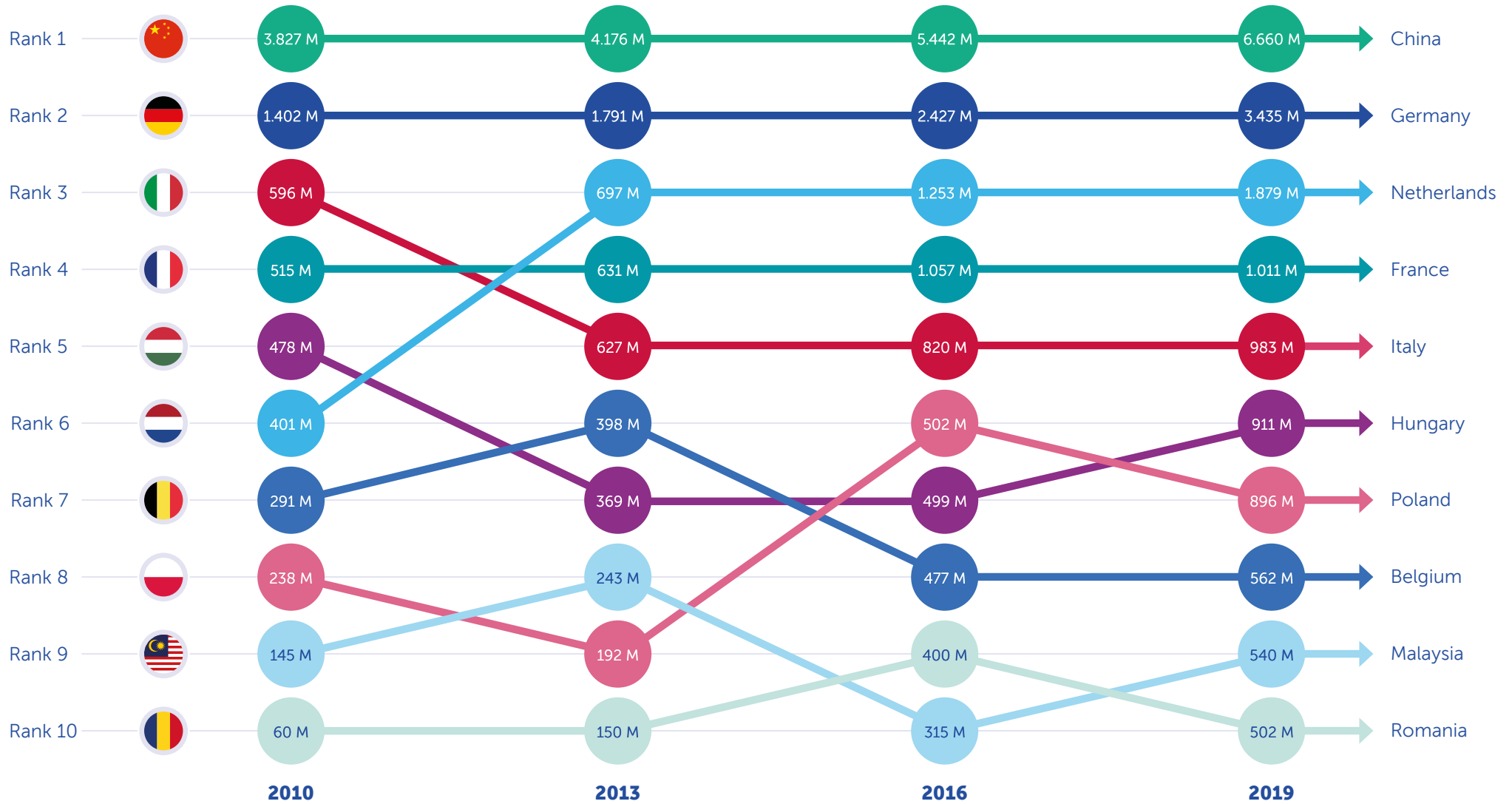


Area	Imports SDA	% Share
● EU28	€ 12.877 M	59,4%
● Asia	€ 68.098 M	37,4%
● Rest of Europe	€ 446 M	2,1%
● North America	€ 237 M	1,1%
● Africa	€ 2,2 M	0,01%
● Oceania	€ 1,9 M	0,008%
● South America	€ 0,2 M	0,0009%

Value market share in 2019. SDA include vacuum cleaners, appliances for food and beverage preparation and personal care appliances.

Source: Eurostat

Top 10 countries of origin for small home appliances, throughout the years

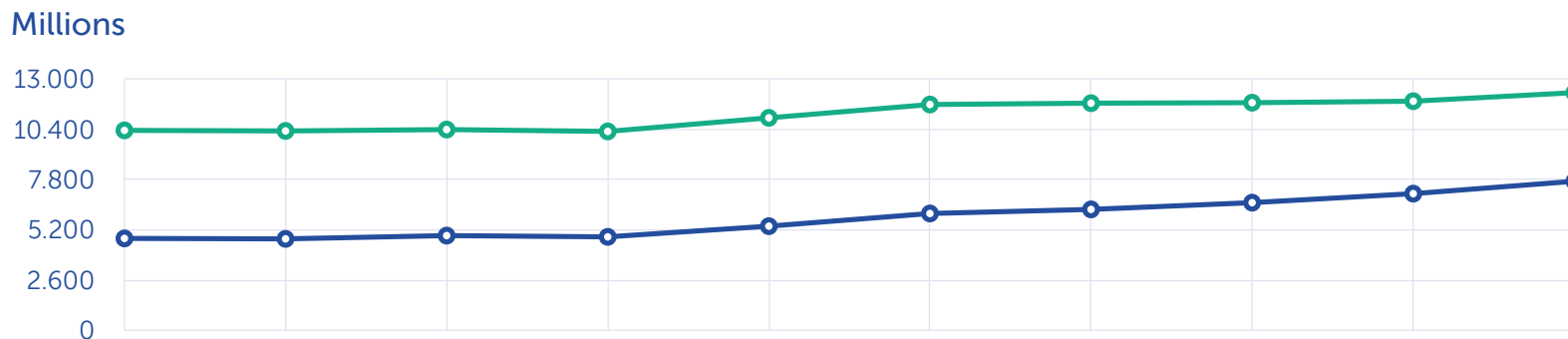


Source: Eurostat

Import trends of large home appliances, 2010-2019



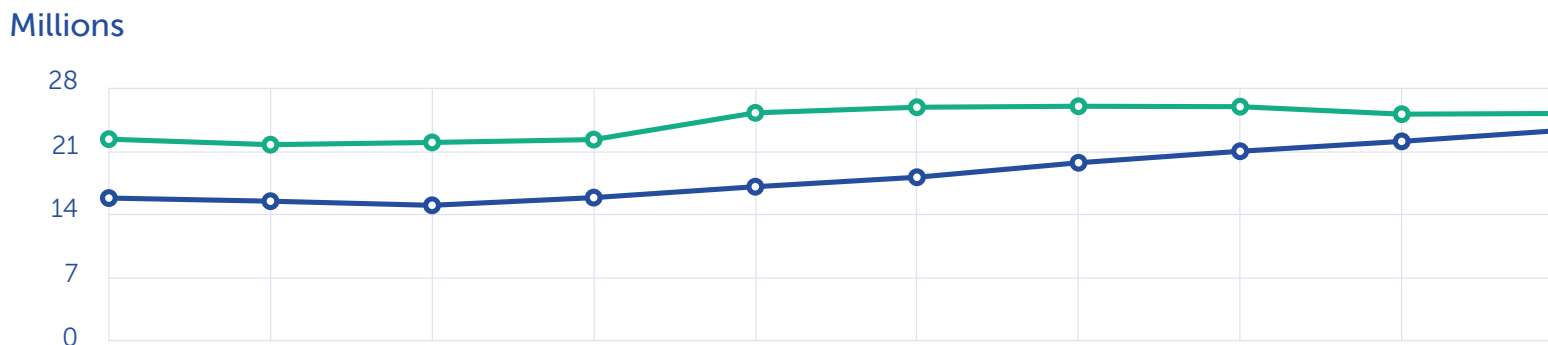
Imports in value



Non-EU trade in value	€ 4.764 M	€ 4.741 M	€ 4.909 M	€ 4.845 M	€ 5.397 M	€ 6.053 M	€ 6.264 M	€ 6.613 M	€ 7.078 M	€ 7.718 M
Intra EU trade in value	€ 10.350 M	€ 10.321 M	€ 10.391 M	€ 10.296 M	€ 10.998 M	€ 11.688 M	€ 11.756 M	€ 11.781 M	€ 11.858 M	€ 12.300 M
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-EU trade in volume	15,9 M	15,5 M	15 M	15,9 M	17,1 M	18,2 M	19,8 M	21,1 M	22,1 M	23,4 M
Intra EU trade in volume	22,4 M	21,8 M	22 M	22,3 M	25,3 M	25,9 M	26 M	26 M	25,2 M	25,2 M



Imports in volumes



Source: Eurostat

Export trends of large home appliances, 2010-2019



Exports in value

Millions

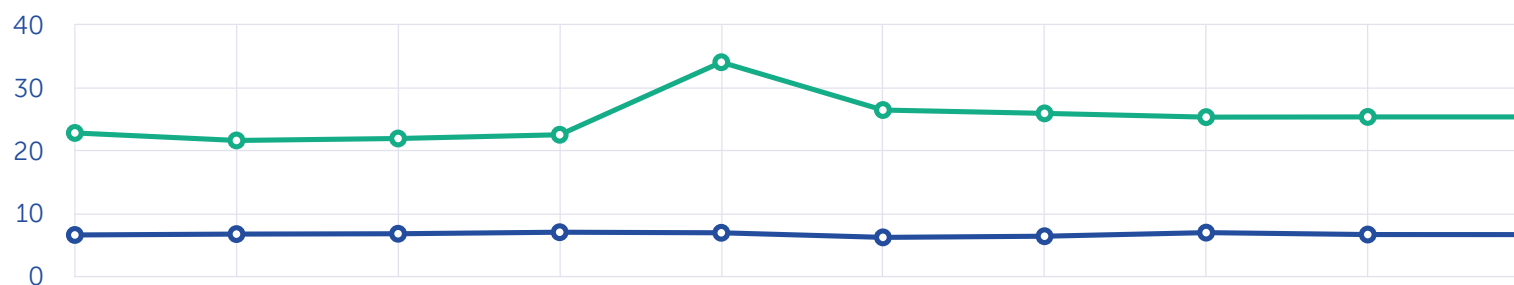


Non-EU trade in value	€ 3.619 M	€ 3.816 M	€ 3.909 M	€ 4.048 M	€ 3.929 M	€ 3.932 M	€ 3.984 M	€ 4.419 M	€ 4.212 M	€ 4.197 M
Intra EU trade in value	€ 10.045 M	€ 10.315 M	€ 10.339 M	€ 10.295 M	€ 10.761 M	€ 11.685 M	€ 11.670 M	€ 11.681 M	€ 11.989 M	12.574 M
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-EU trade in volume	6,6 M	6,8 M	6,8 M	7,1 M	7 M	6,3 M	6,4 M	7 M	6,7 M	6,7 M
Intra EU trade in volume	22,8 M	21,6 M	21,9 M	22,5 M	34 M	26,5 M	25,9 M	25,3 M	25,4 M	25,4 M



Exports in volumes

Millions

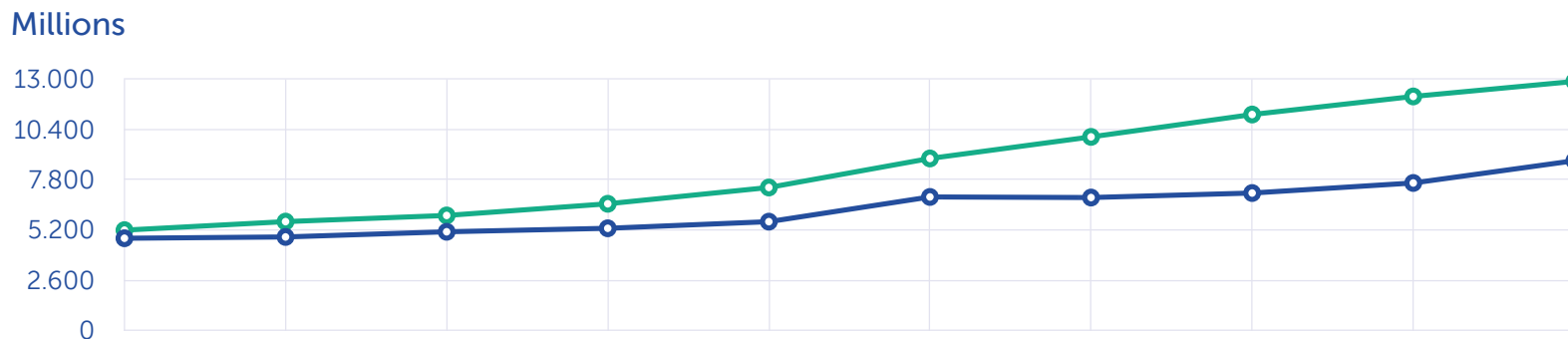


Source: Eurostat

Import trends of small home appliances, 2010-2019



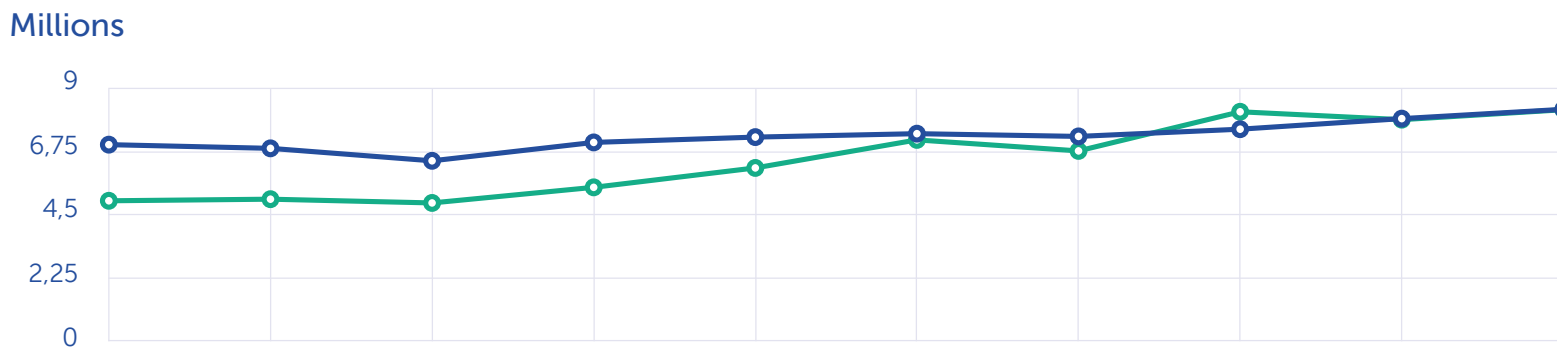
Imports in value



Non-EU trade in value	€ 4.772 M	€ 4.840 M	€ 5.107 M	€ 5.287 M	€ 5.630 M	€ 6.908 M	€ 6.878 M	€ 7.110 M	€ 7.631 M	€ 8.781 M
Intra EU trade in value	€ 5.191 M	€ 5.633 M	€ 5.951 M	€ 6.554 M	€ 7.397 M	€ 8.898 M	€ 10.013 M	€ 11.170 M	€ 12.104 M	€ 12.881 M
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-EU trade in volume	7 M	6,9 M	6,4 M	7,1 M	7,3 M	7,4 M	7,3 M	7,6 M	7,9 M	8,3 M
Intra EU trade in volume	5 M	5,1 M	4,9 M	5,5 M	6,2 M	7,2 M	6,8 M	8,2 M	7,9 M	8,2 M



Imports in volumes



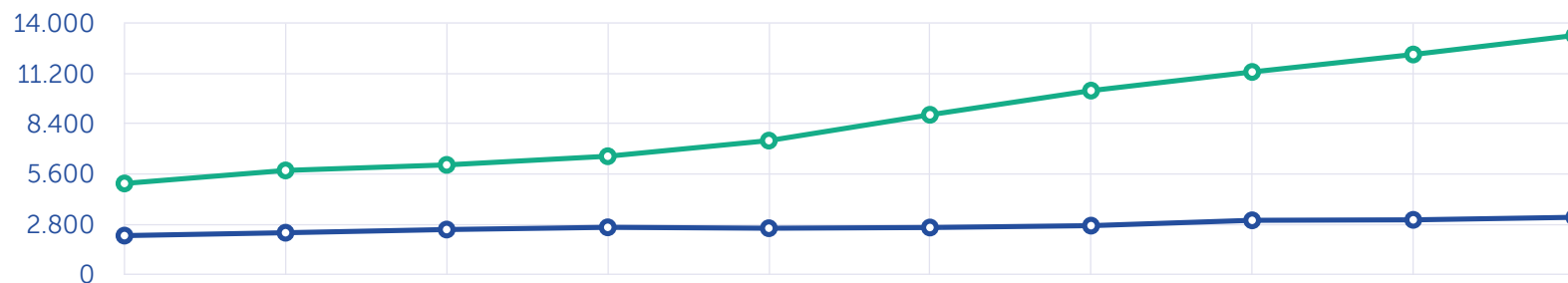
Source: Eurostat

Export trends of small home appliances, 2010-2019



Exports in value

Millions

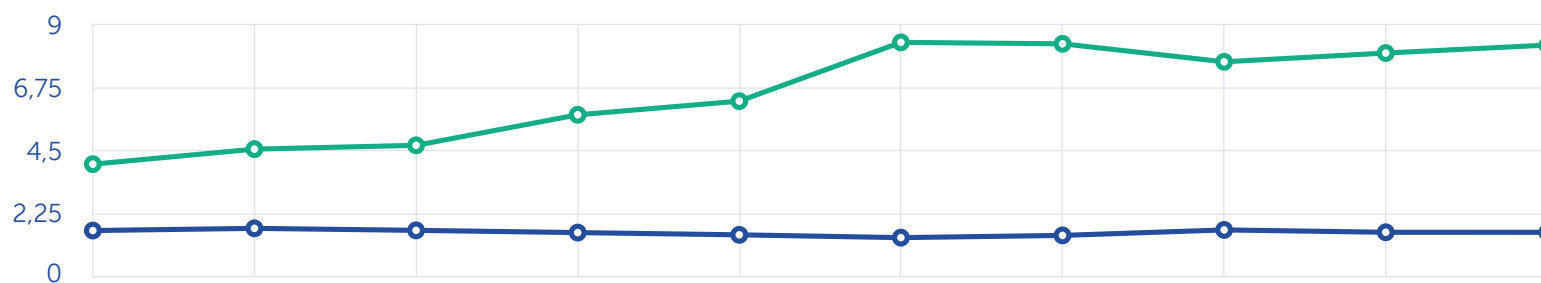


Non-EU trade in value	€ 2.170 M	€ 2.331 M	€ 2.508 M	€ 2.632 M	€ 2.582 M	€ 2.621 M	€ 2.725 M	€ 3.023 M	€ 3.048 M	€ 3.190 M
Intra EU trade in value	€ 5.076 M	€ 5.801 M	€ 6.110 M	€ 6.592 M	€ 7.463 M	€ 8.902 M	€ 10.249 M	€ 11.288 M	€ 12.261 M	€ 13.320 M
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-EU trade in volume	1,7 M	1,7 M	1,7 M	1,6 M	1,5 M	1,4 M	1,5 M	1,7 M	1,6 M	1,6 M
Intra EU trade in volume	4,0 M	4,6 M	4,7 M	5,8 M	6,3 M	8,4 M	8,3 M	7,7 M	8 M	8,3 M



Exports in volumes

Millions

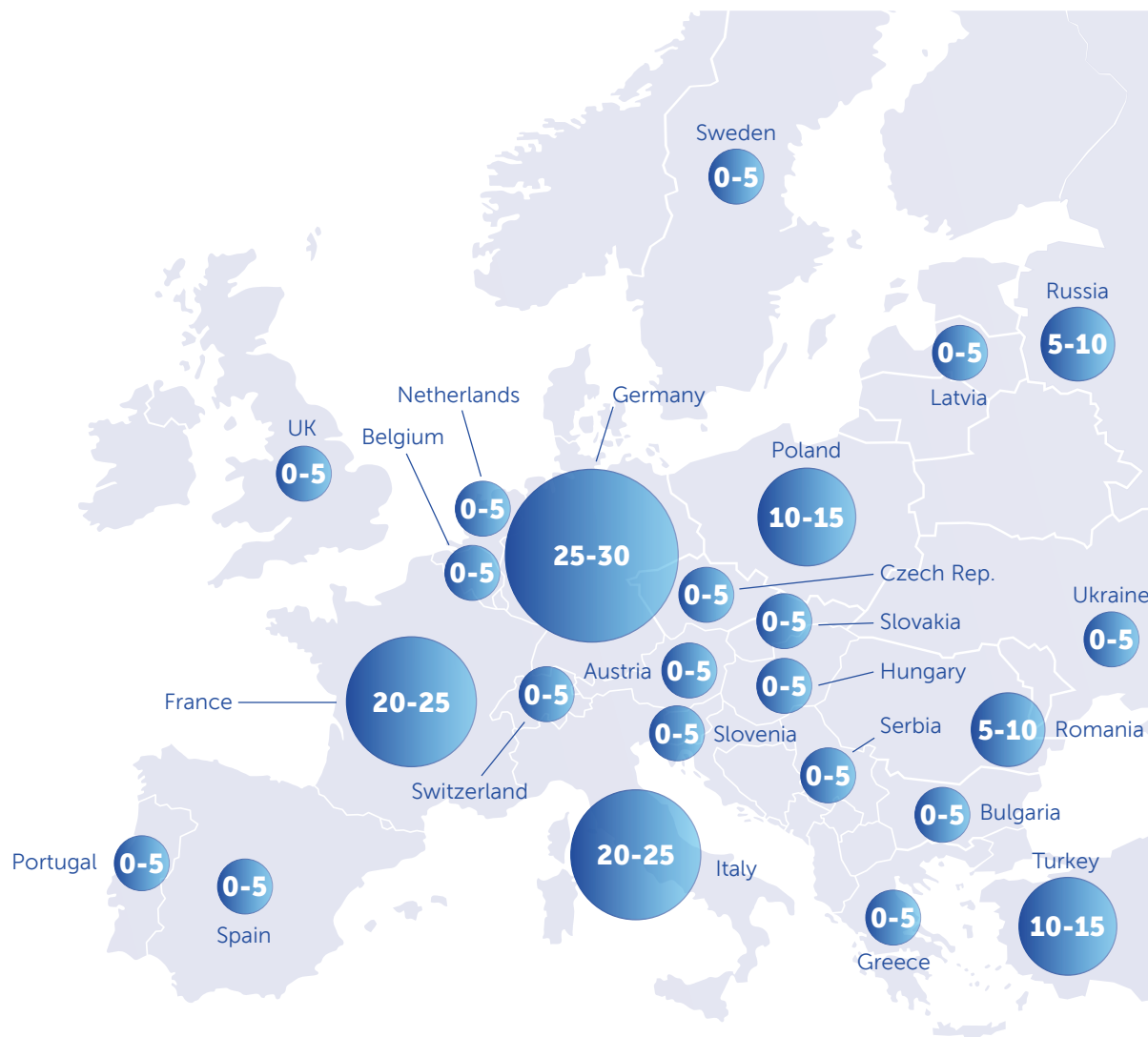


Source: Eurostat



APPLiA Direct Members' Manufacturing Sites in Europe, in 2020

Country	Number of manufacturing sites	Scale
Austria	3	0-5
Belgium	2	0-5
Bulgaria	1	0-5
Czech Rep.	4	0-5
France	20	20-25
Germany	26	25-30
Greece	1	0-5
Hungary	2	0-5
Italy	20	20-25
Latvia	1	0-5
Netherlands	3	0-5
Poland	14	10-15
Portugal	1	0-5
Romania	8	5-10
Russia	8	5-10
Serbia	3	0-5
Slovakia	3	0-5
Slovenia	5	0-5
Spain	4	0-5
Switzerland	2	0-5
Turkey	13	10-15
UK	5	0-5
Ukraine	2	0-5



Source: APPLiA Membership

Full version available online now at:

www.applia-europe.eu/statistical-report-2019-2020/introduction



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