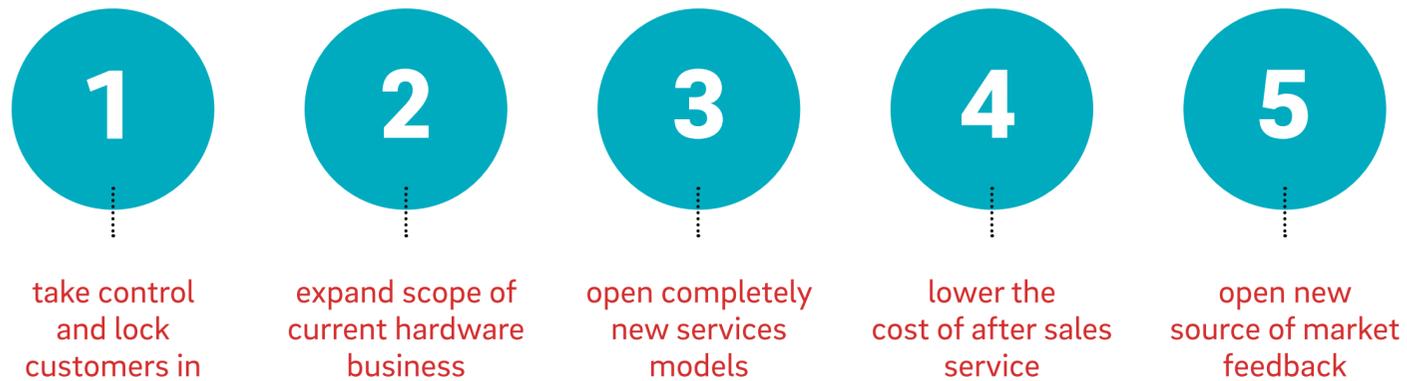


Connectivity is a game changer: customer centric digitalisation of white goods producers

5 reasons why producers are connecting washing machines and other appliances with the internet (and your smart phones):



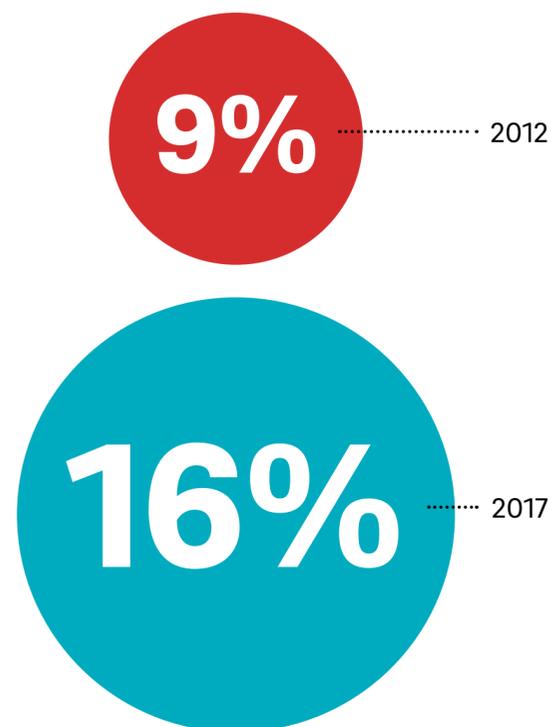
CONNECTIVITY TURNING INTO STANDARD FEATURE

Share of connected washing machines in major markets 2017



ONLINE SALES SOAR

Global online sales share of white goods



DATA ANALYTICS COULD SPARK NEW SERVICES

Examples of new business models

E-commerce

- From simple basket analysis to customer predictive algorithms

- Fast & effective recommendation engines

- User experience analytics

Drive & home delivery analytics

- Campaign delivery performance

- Ad exposure & effectiveness

Data monetization

- Data feed: interest/intent segments supplied on data exchanges platforms or for display bid enrichment (RTB)

- Enriched/packaged data: production of market reports gathering geographical analysis, basket analysis, brand analysis, etc.

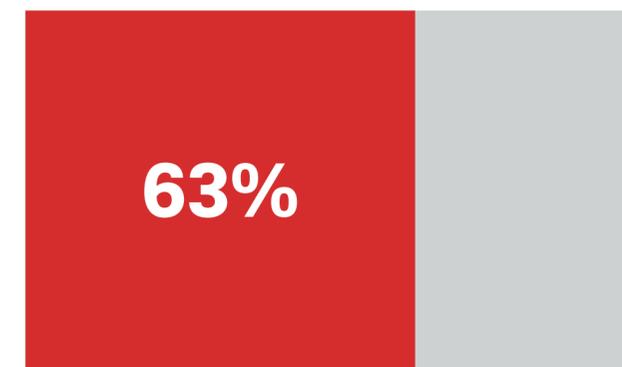
EXAMPLES OF CUSTOMER-ORIENTED DIGITAL OFFERS



MARKET CONCENTRATION

The top 10 manufacturers of white goods hold a combined **63%** of market share; market share of Asian producers has risen to 37%

World Market



Top 10 manufacturers

- 1 Haier Group
- 2 Whirlpool Corp
- 3 Midea Group Co Ltd
- 4 Electrolux AB
- 5 BSH Hausgeräte GmbH
- 6 LG Corp
- 7 Samsung Corp
- 8 Panasonic Corp
- 9 Arçelik AS
- 10 Hon Hai Precision Industry Co Ltd