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## Foreword



**Dr Peter Goetz,**  
**APPLiA President**

Alongside Europe banking on innovation as a driving force in enabling the roll-out of the twin transition to a climate neutral economy, this report portrays the 4.0 developments and progresses made by the home appliance industry in Europe to enhance circularity and facilitate the implementation of a EU policy framework for a circular economy that preserves the EU Single Market, competition, and innovation at all levels, confirming the sector as a lead actor in a fast-paced global economy. By the numbers, the latest steps moved by the industry to untap the full value of the energy transition.



**Paolo Falcioni,**  
**APPLiA Director-General**

Squaring the circle of climate targets and industrial prosperity is the foremost challenge of our time. And this has to do with advancing sustainable lifestyles, enabling a safe connected home and accelerating Europe's growth. Funding pillars of the home appliance industry, these objectives function as key drivers for the sector, towards a more prosperous future in Europe and the wider world. The 6th edition of the home appliance industry annual report provides a tangible update on the improving trends of the sector in each of the above mentioned areas, with an eye at reaching the EU's 2030 climate ambition.



# APPLiA Membership

## APPLiA Direct Members

		B/S/H/	
	dyson		gorenje
			
LIEBHERR			Panasonic
PHILIPS			
	VESTEL		

# National Associations



# Meet the Secretariat



**Paolo Falcioni**  
Director-General



**Candice Franck**  
Office Manager



**Federica Lavoro**  
Communication  
Officer



**John Byrne**  
Junior Communication  
Officer



**Korrina Hegarty**  
Policy Director,  
Environment



**Naomi Marc**  
Policy Officer,  
Environment



**Matteo Rambaldi**  
Policy Director,  
Energy



**Giulia Zilla**  
Policy Manager, Energy  
and Environment



**Madeline Vander Velde**  
Junior Policy Officer,  
Energy



**Candice Richaud**  
Senior Policy Manager,  
Corporate



**Maite Castells**  
Junior Policy Officer,  
Environment



**Michał Zakrzewski**  
Policy Director, Digital  
and Competitiveness



**Yannick Lenaerts**  
Data Officer



**Alvaro Vilas**  
Junior Policy Officer, Digital  
and Competitiveness

# The Home Appliance Industry in Europe in 2020



**€ 56.597 M**

Direct & indirect value added to GDP



**€ 54.679 M**

Turnover in the EU



**3.214**

Number of enterprises in the EU



**215.225**

Number of direct employees



**946.990**

Number of direct & indirect employees



**€ 32.073\***

Wages & salaries

\*2019 data, per employee

Data reflects "Manufacture of domestic appliances" as defined in Eurostat NACE rev.2: 27.5, including Manufacture of electric domestic appliances (NACE rev.2: 27.51) and Manufacture of non-electric domestic appliances (NACE rev.2: 27.52).





## 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



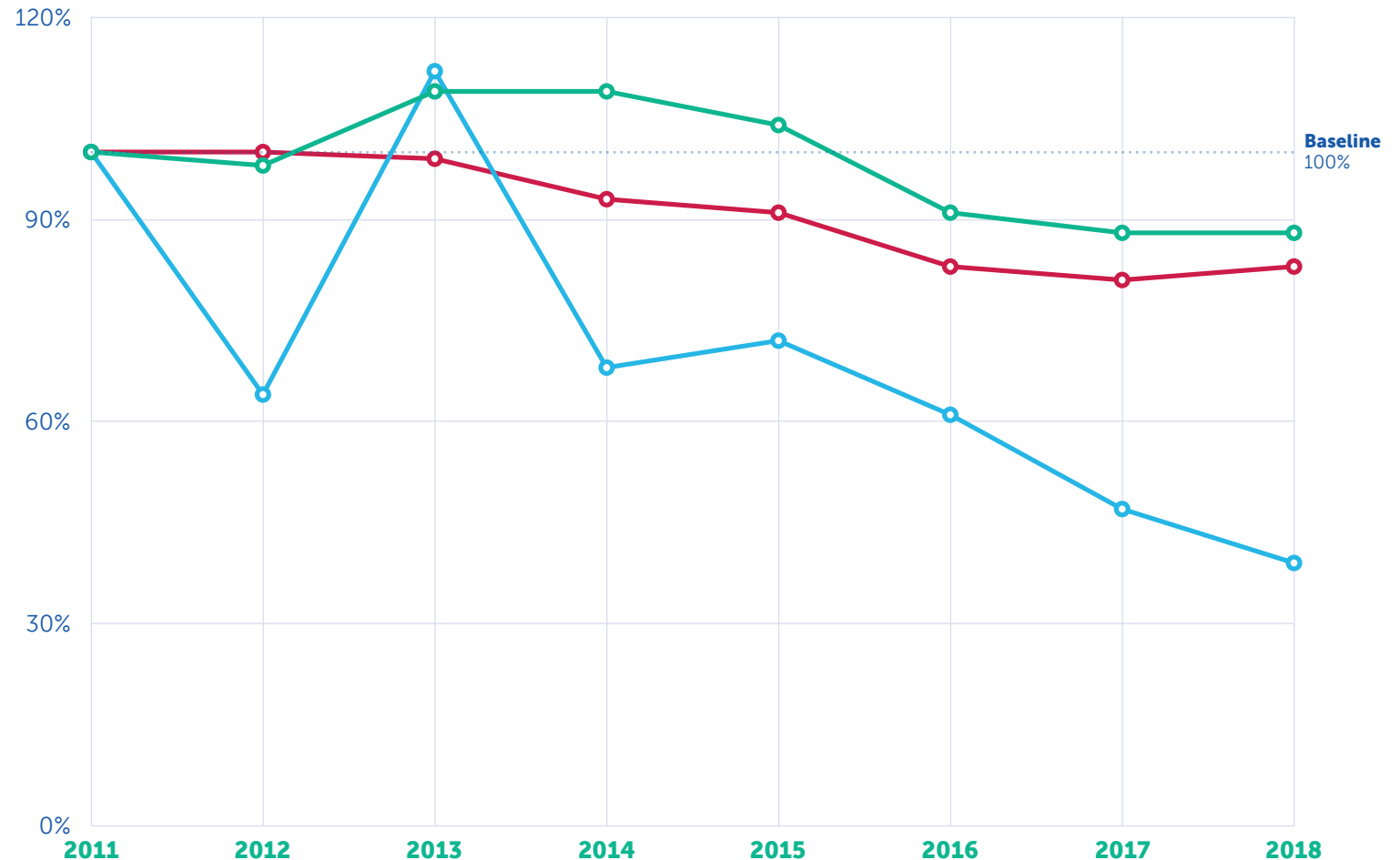
**-61%**

**Reduction in water**  
consumption during  
production



**-17%**

**Reduction in energy**  
consumption during  
production

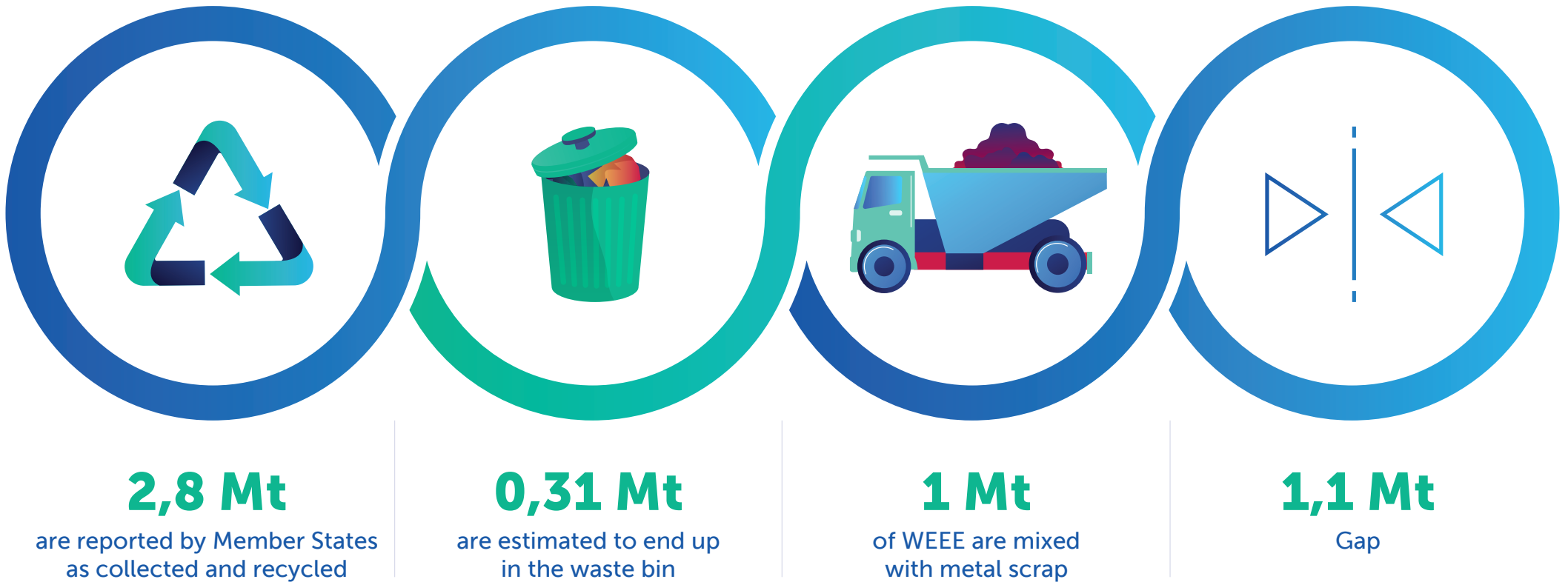


The home appliance industry continuously works to reduce the impact of production processes and particularly the consumption of energy and water as well as the reduction of waste during production processes. Benchmarking with the EU manufacturing industry shows that, in absolute consumption, the home 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

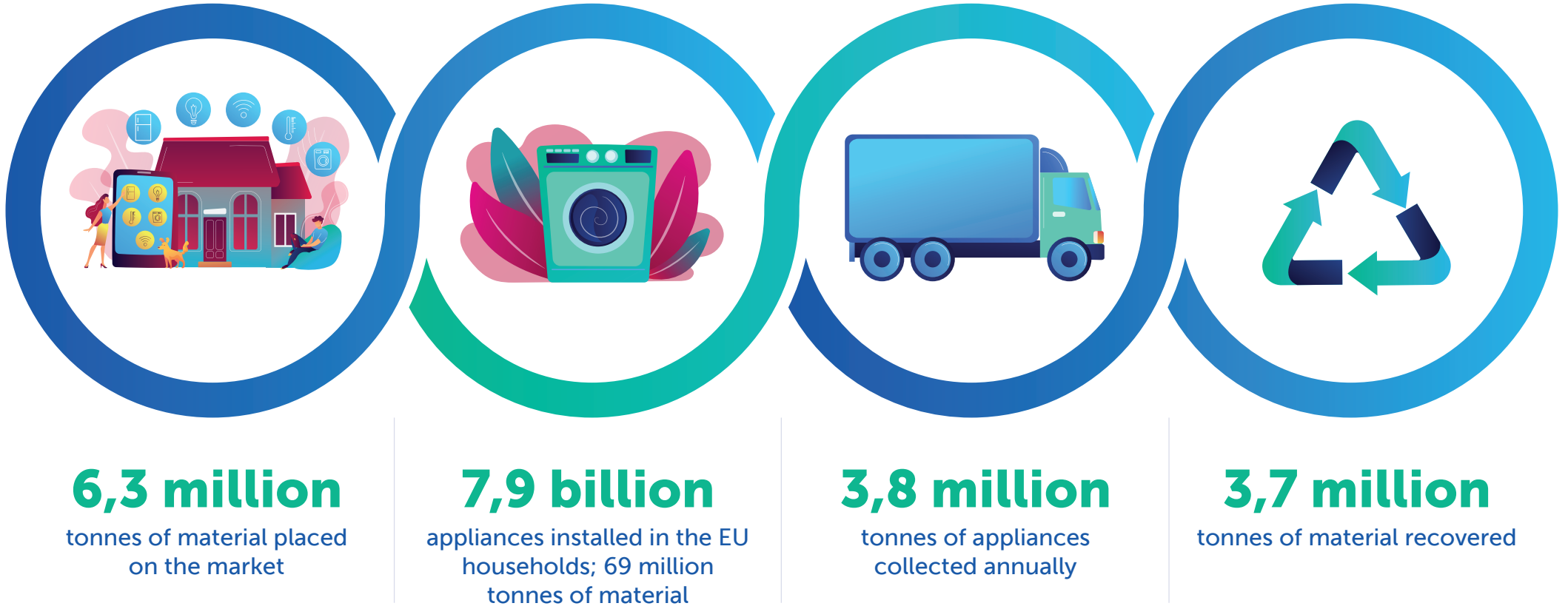


## Waste of Electrical and Electronic Equipment (WEEE) in Europe



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



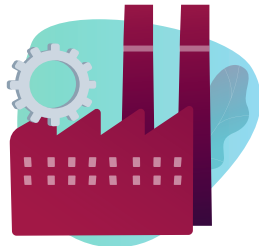
# When it comes to repair, #DontDespair



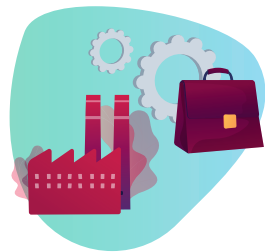
**205 M**  
units placed on the  
market in 2018



**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

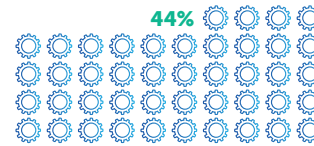
Labour

Transport

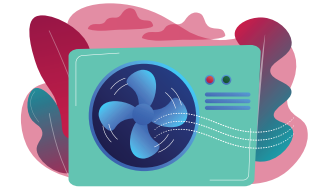
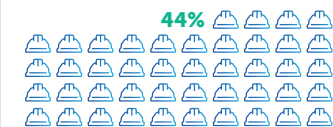
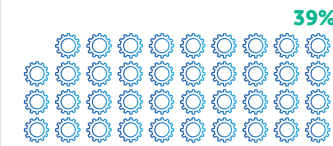
Other



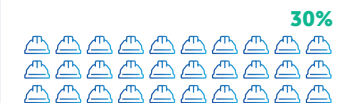
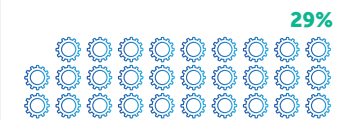
Small appliances



Large appliances



Cooling & Freezing

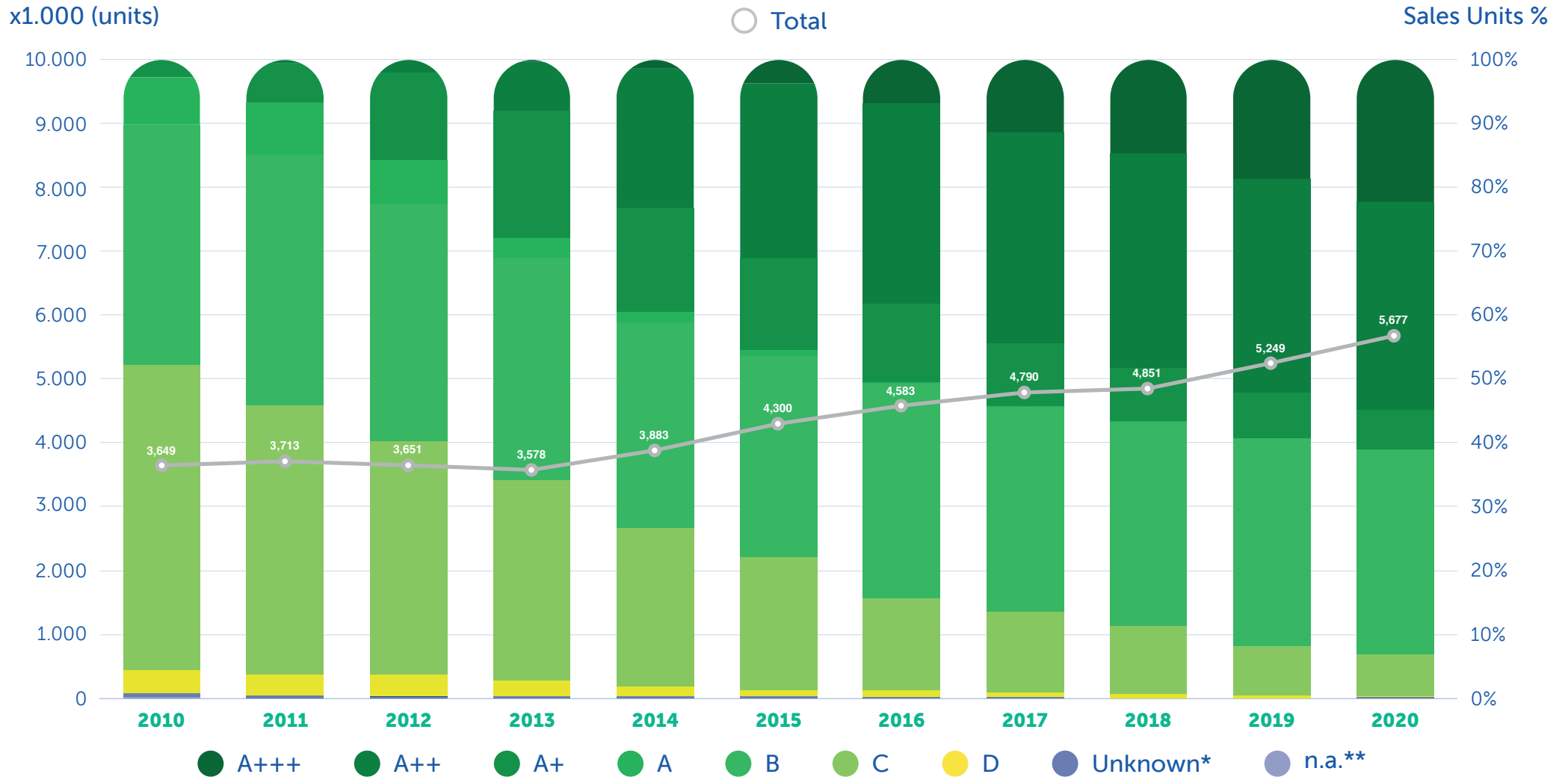


According to data collected from APPLiA's membership, 91% of the requests to manufacturers for a repair of a product resulted in an actual repair in 2018. Breaking down the cost for repair activities, for large appliances for instance, the biggest chunk is the labour cost, representing 44%; 39% of the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

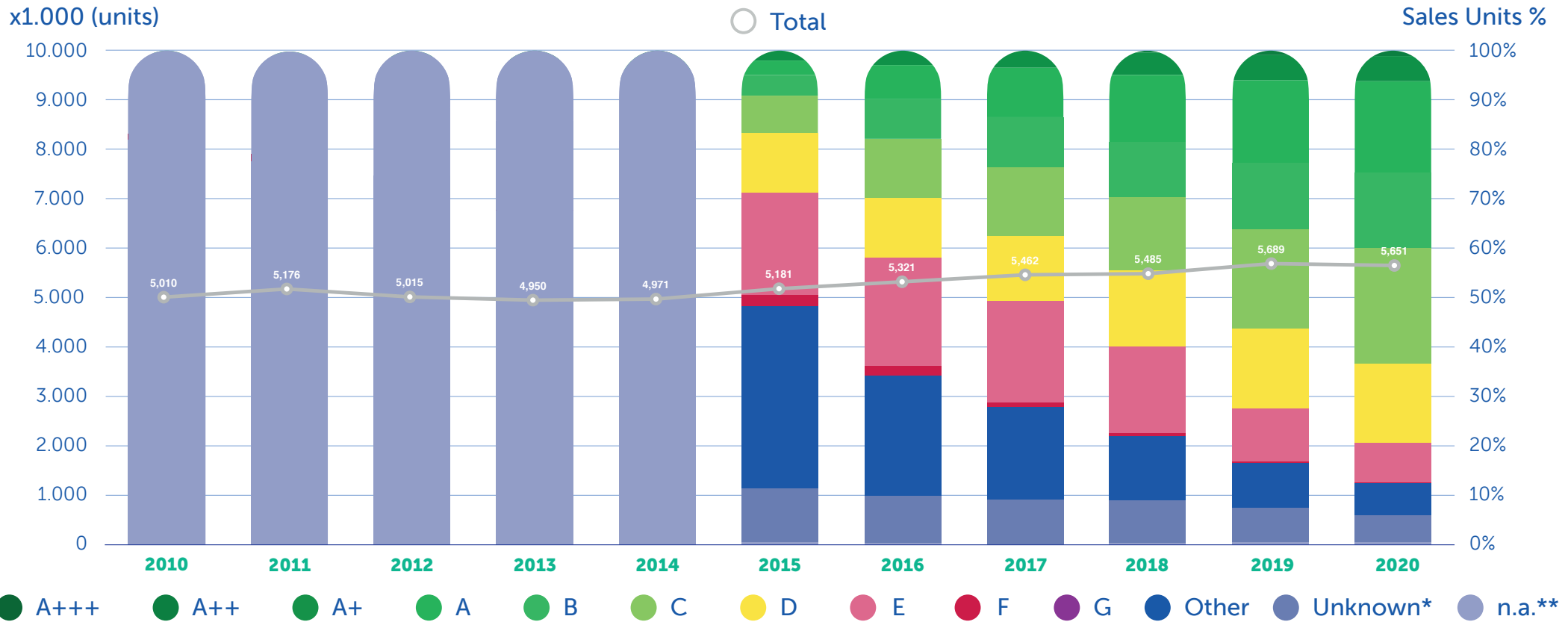
As an observation, nearly 50% of the cost is linked to the work behind the repair and it is not surprising because around 29.000 business partners are directly or indirectly linked to repair activities and services. Manufacturers already provide repair parts, documentation and software to repair services 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 tumblers, 2010-2020



# Energy efficiency in Europe for hoods, 2010-2020







## Pillar 2

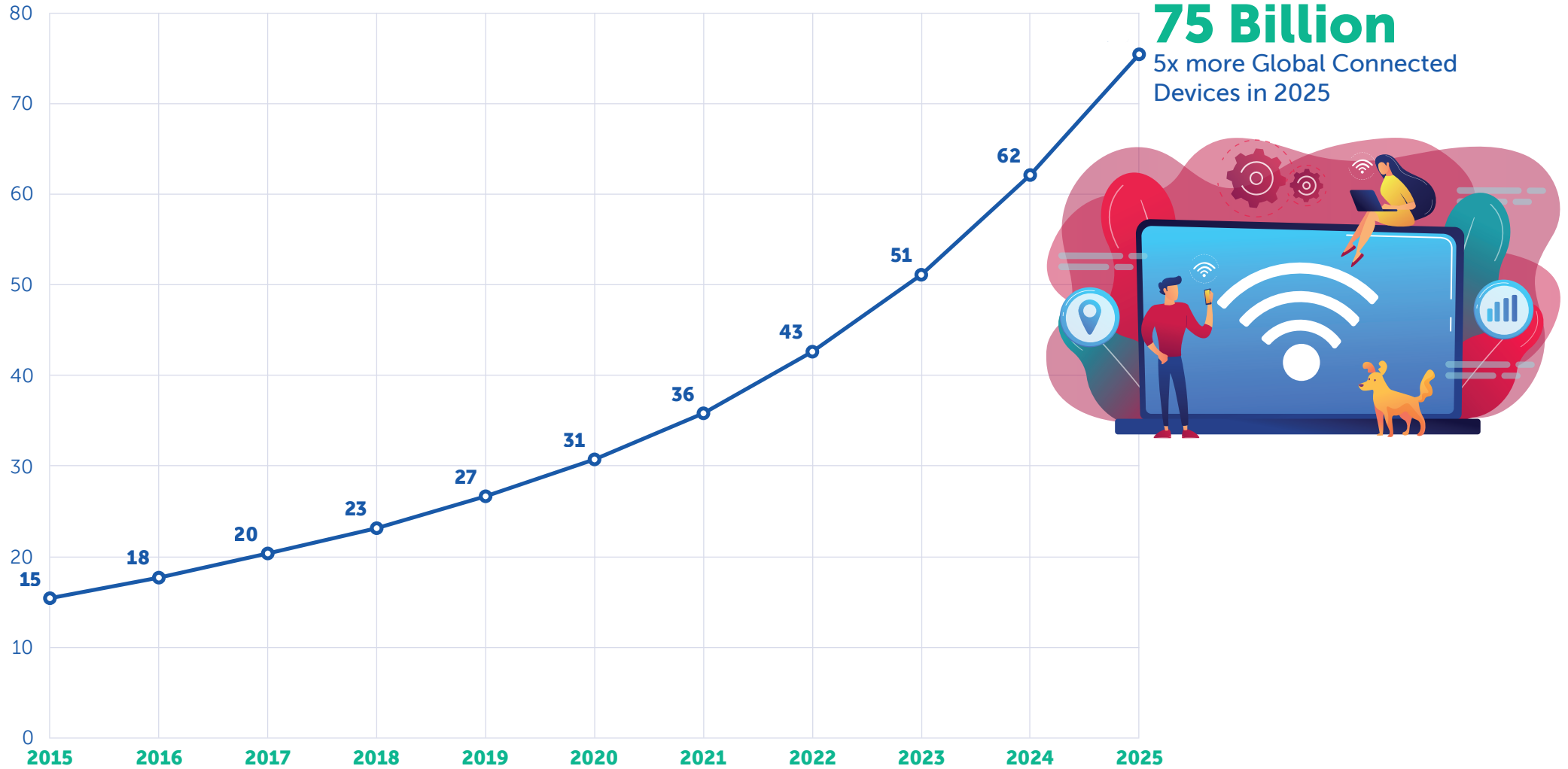
### Living the Connected Home

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

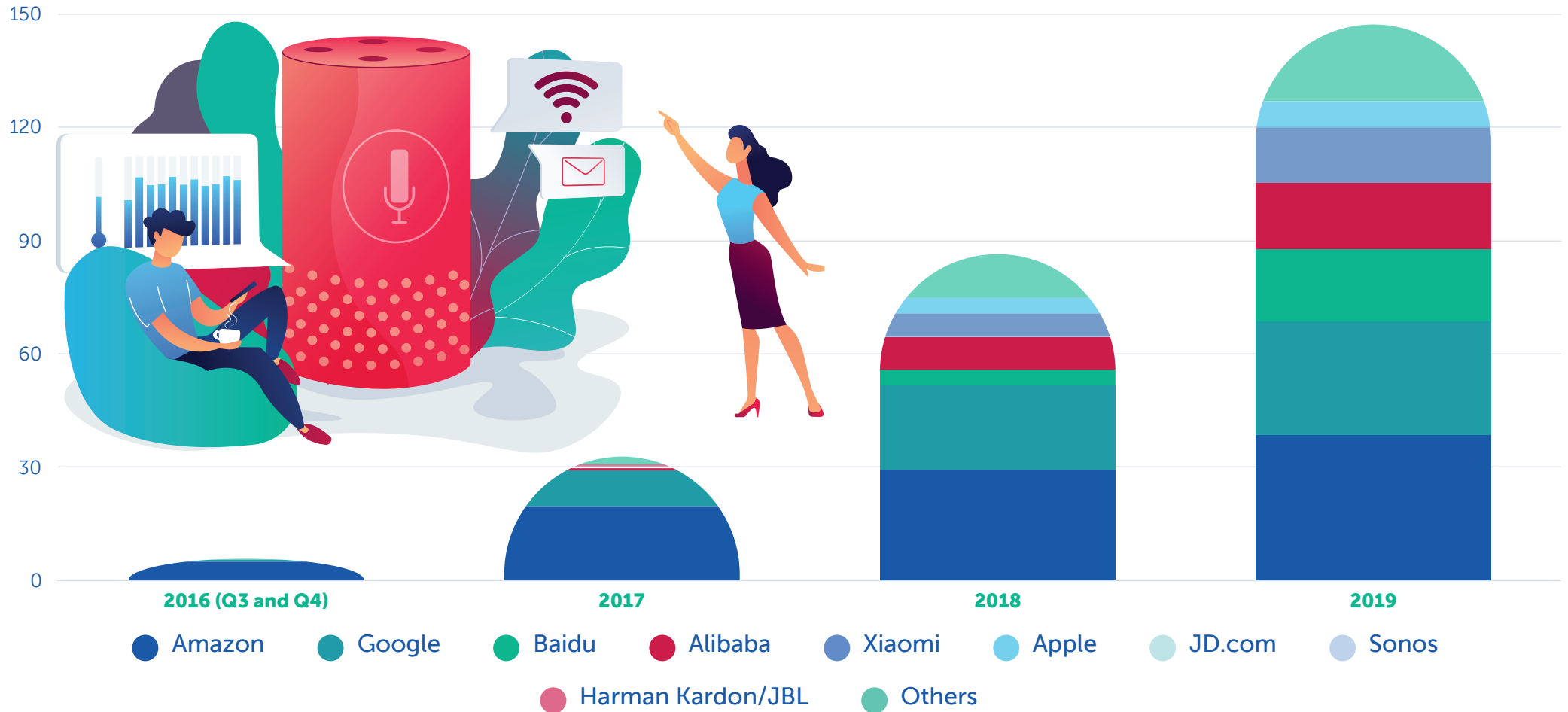


Source: IHS, Forbes

# 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

# Energy consumption in households, for the main energy products, in Europe, in 2019



**63,5%**  
Space heating

**14,8%**  
Water heating

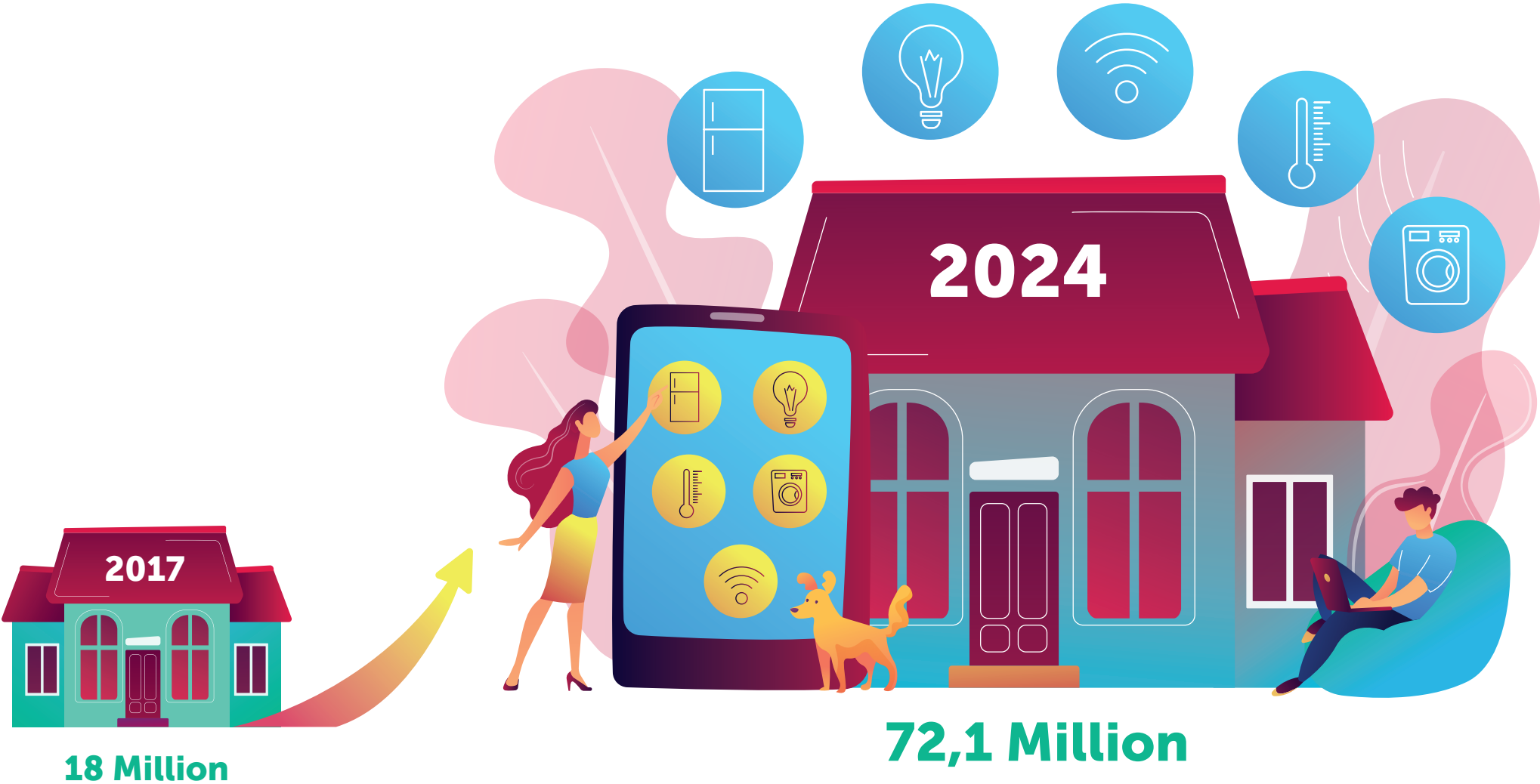
**14,1%**  
Lighting and  
appliances

**6,1%**  
Cooking

**0,4%**  
Space cooling

Source: Eurostat

# Total number of Smart Homes, in Europe

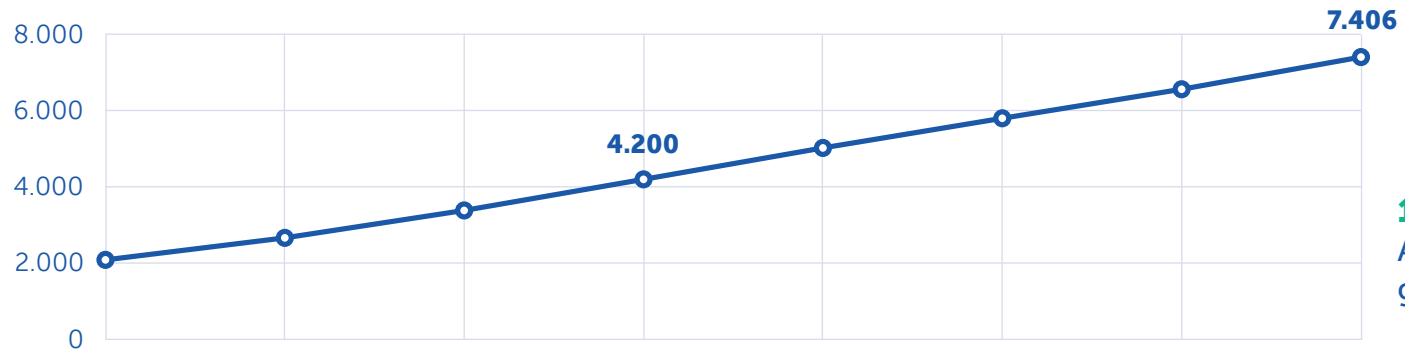


Source: Statista

# Smart appliances in Europe

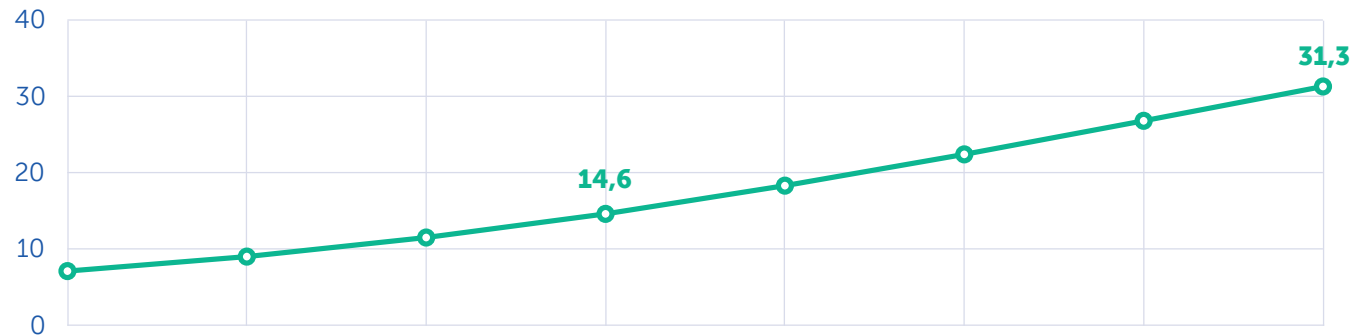
## Revenue of smart appliances in Europe

in million euros



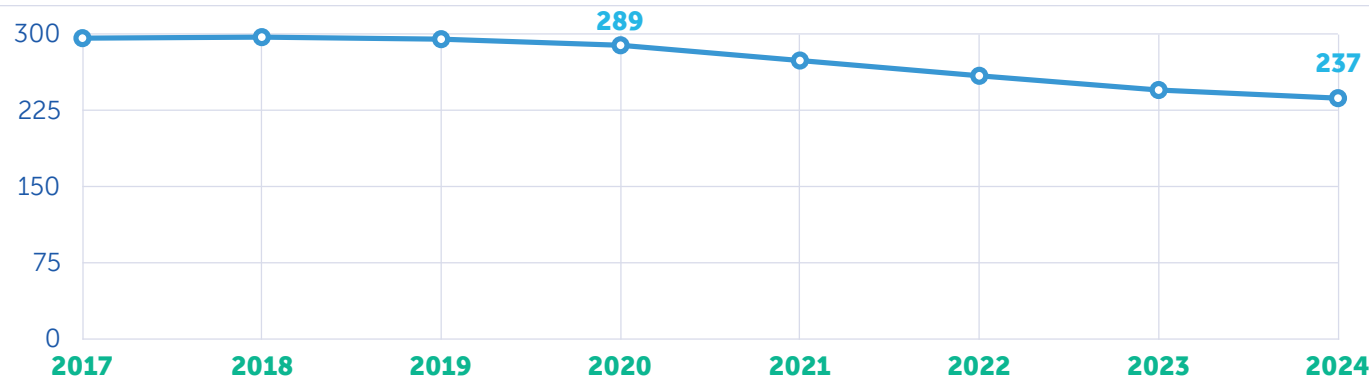
## Users of smart appliances in Europe

in million users



## Average revenue per user, in Europe

in million euros



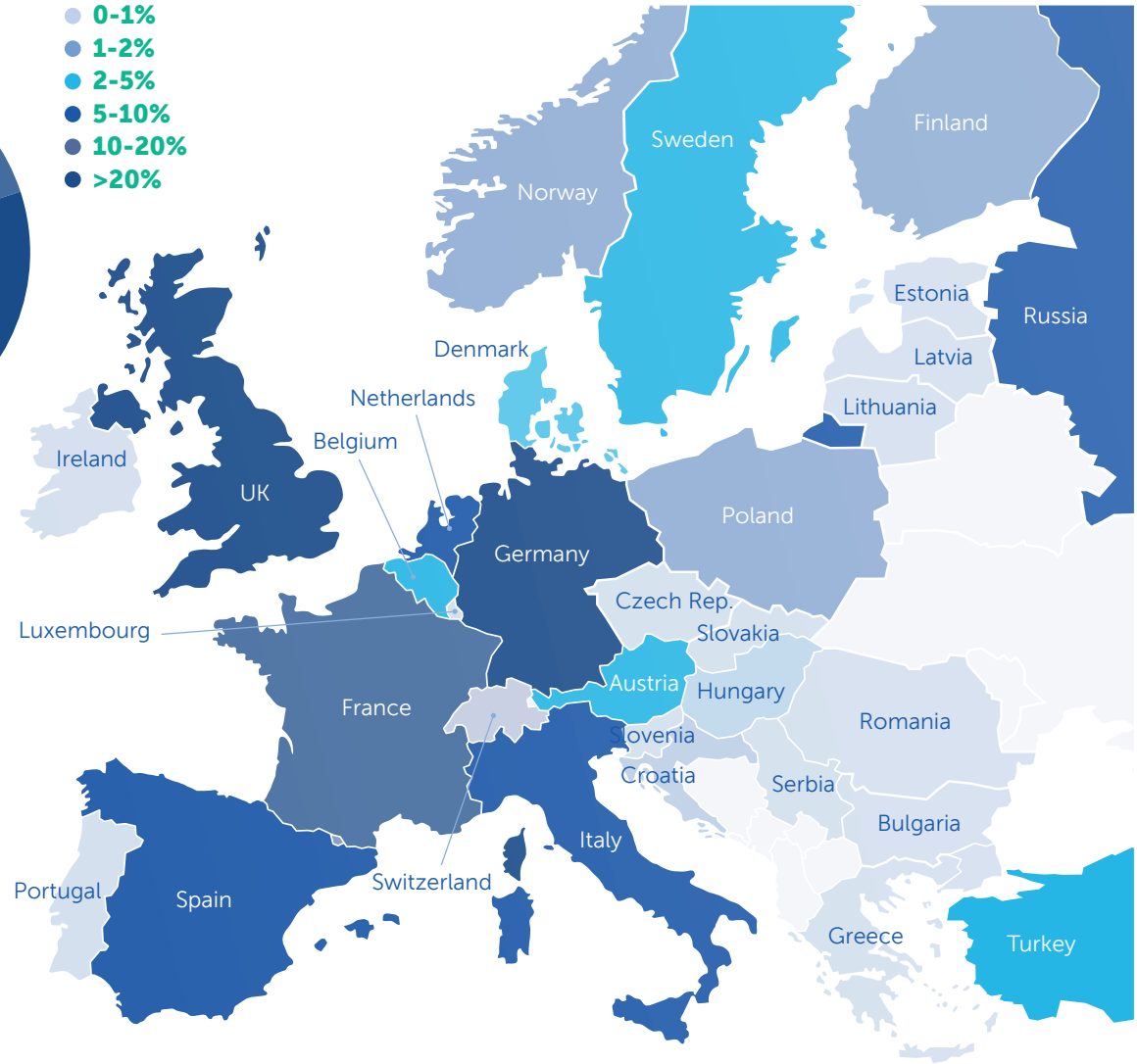
Source: Statista

# Revenue of smart appliances in Europe

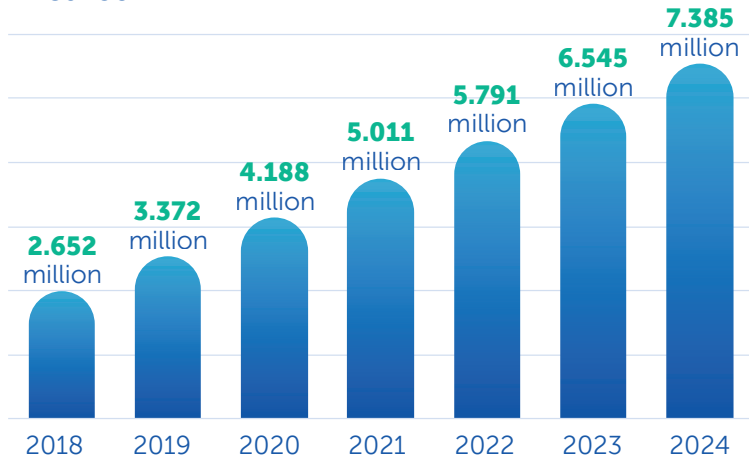
Country	%
Austria	2
Belgium	2,4
Bulgaria	0,2
Croatia	0,3
Czech Rep.	0,7
Denmark	2,1
Estonia	0,2
Finland	1,4
France	10,7
Germany	22,2
Greece	0,3
Hungary	0,4
Ireland	0,5
Italy	6,5
Latvia	0,1
Lithuania	0,2
Luxembourg	0,1
Netherlands	5,3
Norway	1,9
Poland	1,5
Portugal	0,7
Romania	0,7
Russia	5,1
Serbia	0,2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



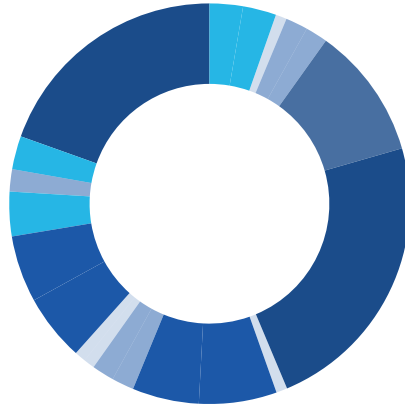
## In euros



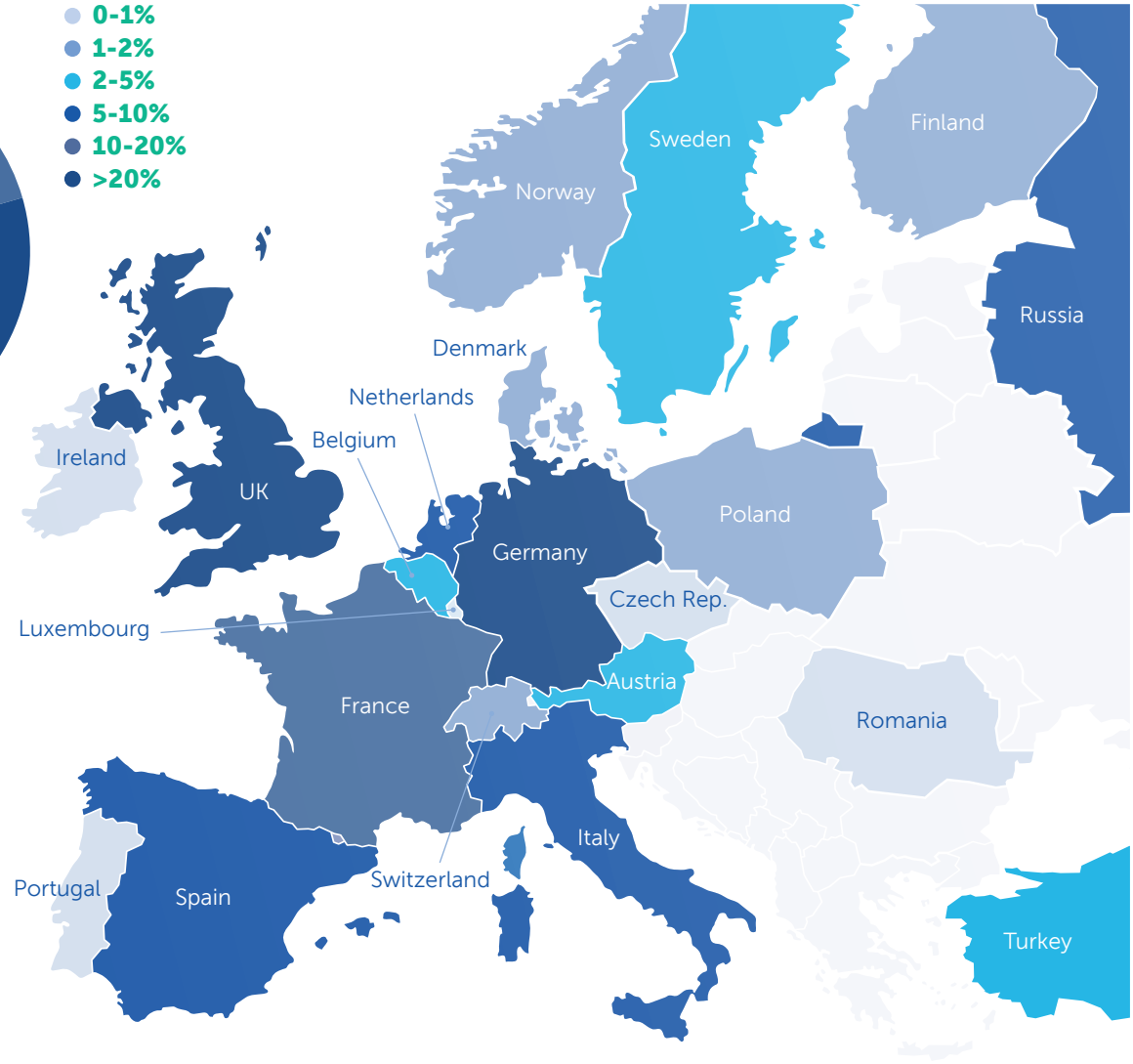
Source: Statista

# Users of smart appliances in Europe

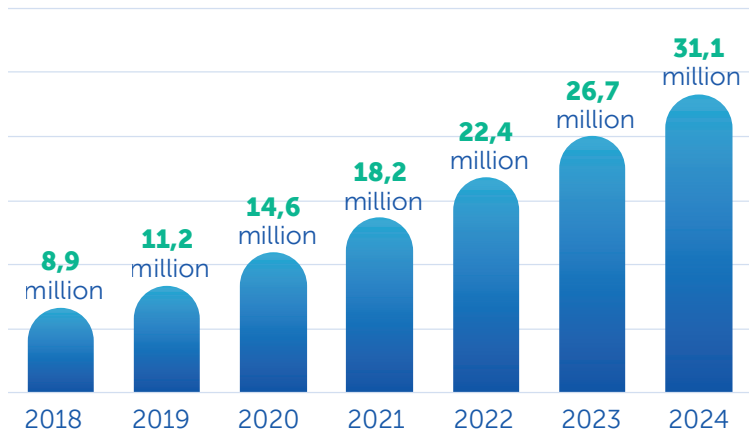
Country	%
Austria	2,7
Belgium	2,7
Czech Rep.	0,9
Denmark	1,8
Finland	1,8
France	10,7
Germany	23,2
Ireland	0,9
Italy	6,3
Netherlands	5,4
Norway	1,8
Poland	1,8
Portugal	0,9
Romania	0,9
Russia	5,4
Spain	5,4
Sweden	3,6
Switzerland	1,8
Turkey	2,7
UK	19,6



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

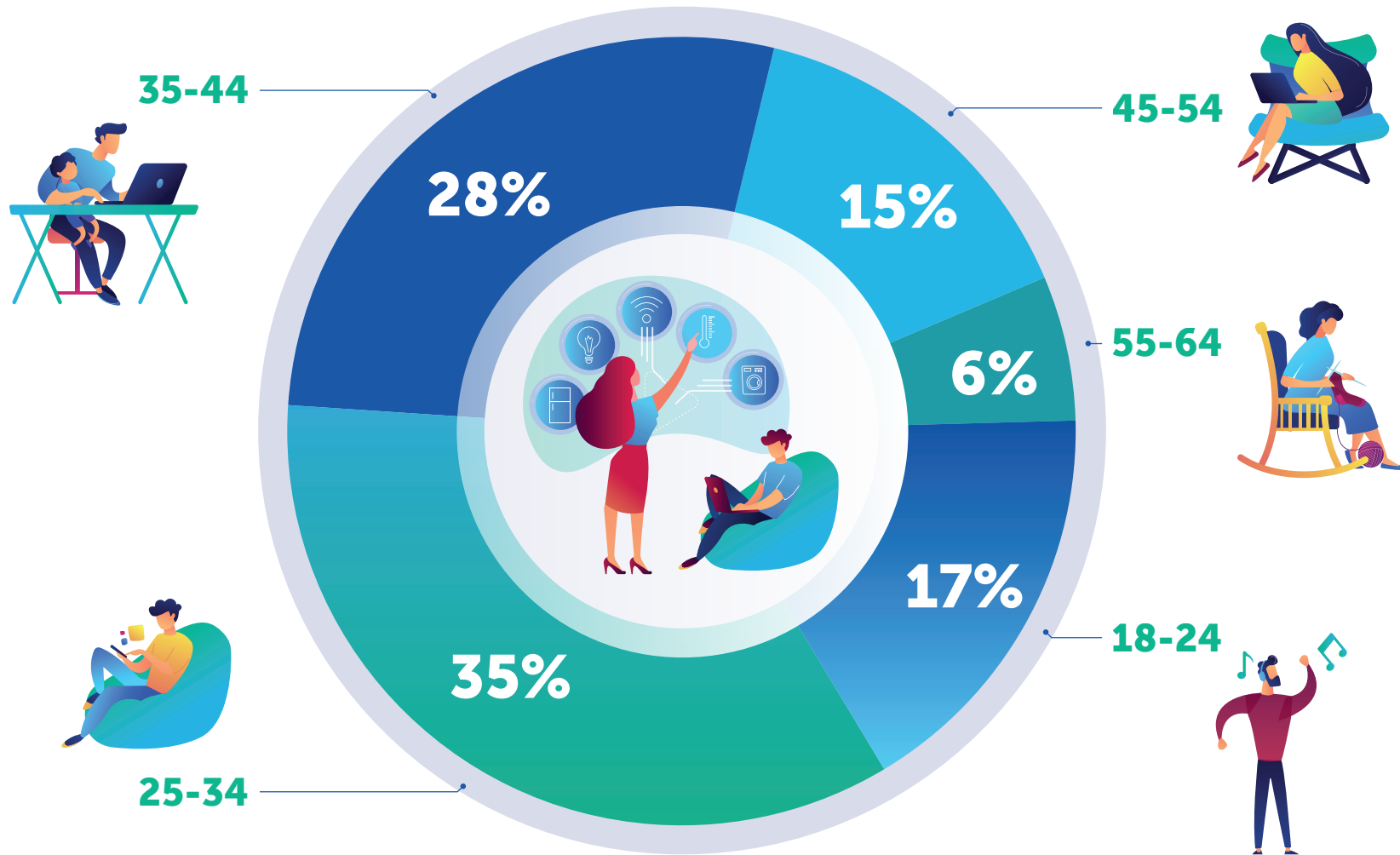


## In users



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





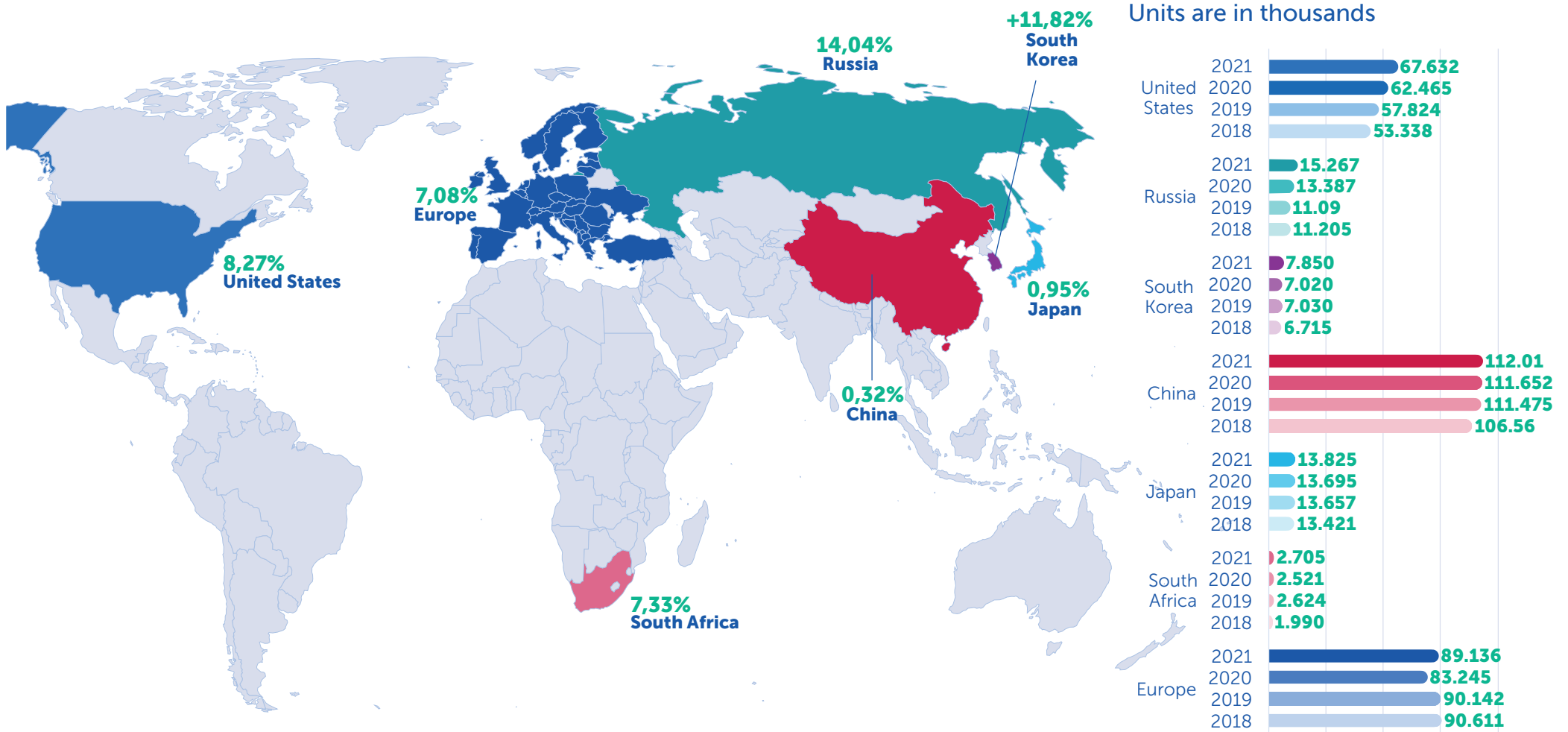
## Pillar 3

### 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 2021

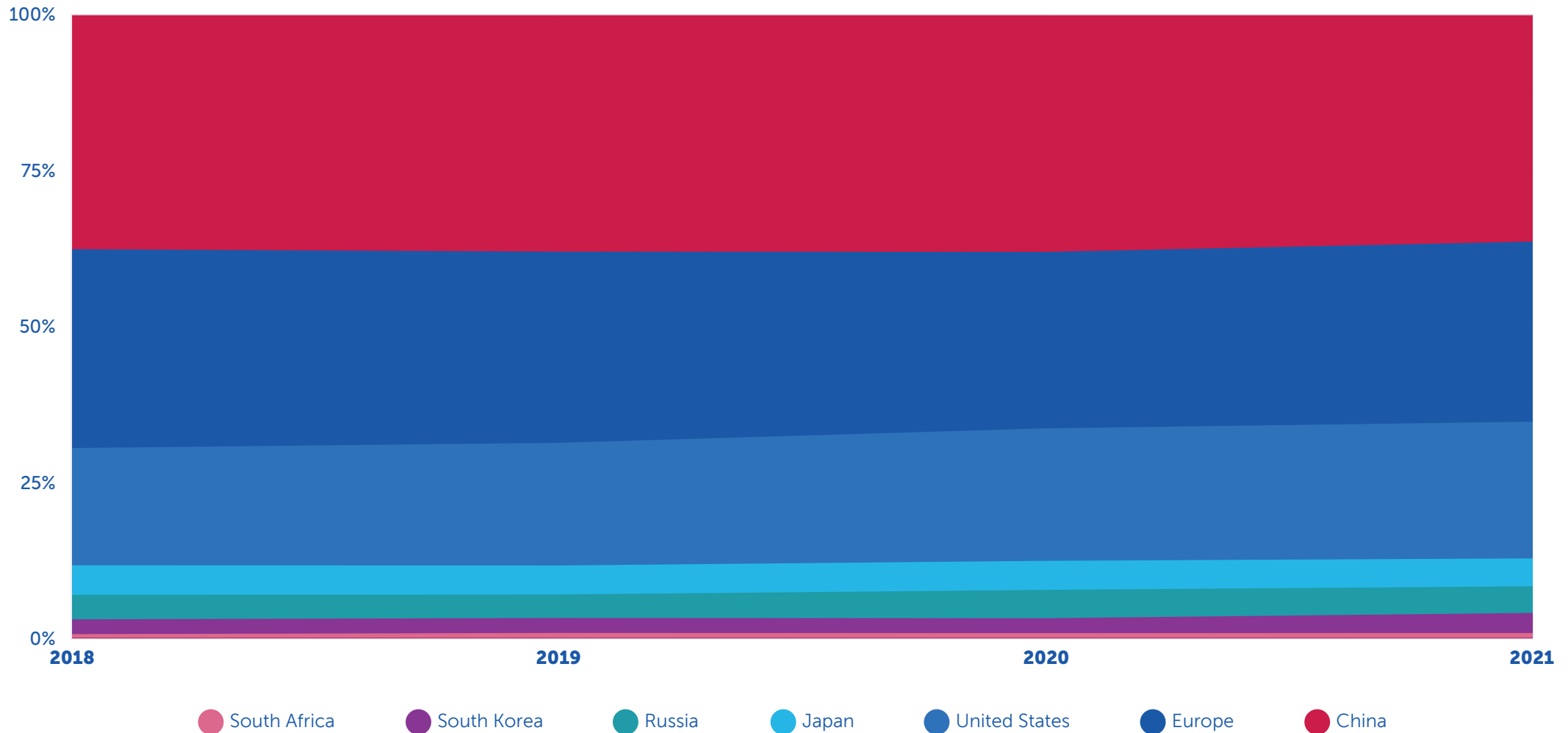


MDA7 product groups shown in graph include: fridges, freezers, dishwashers, washing machines, tumble dryers, hoods, microwave ovens.

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



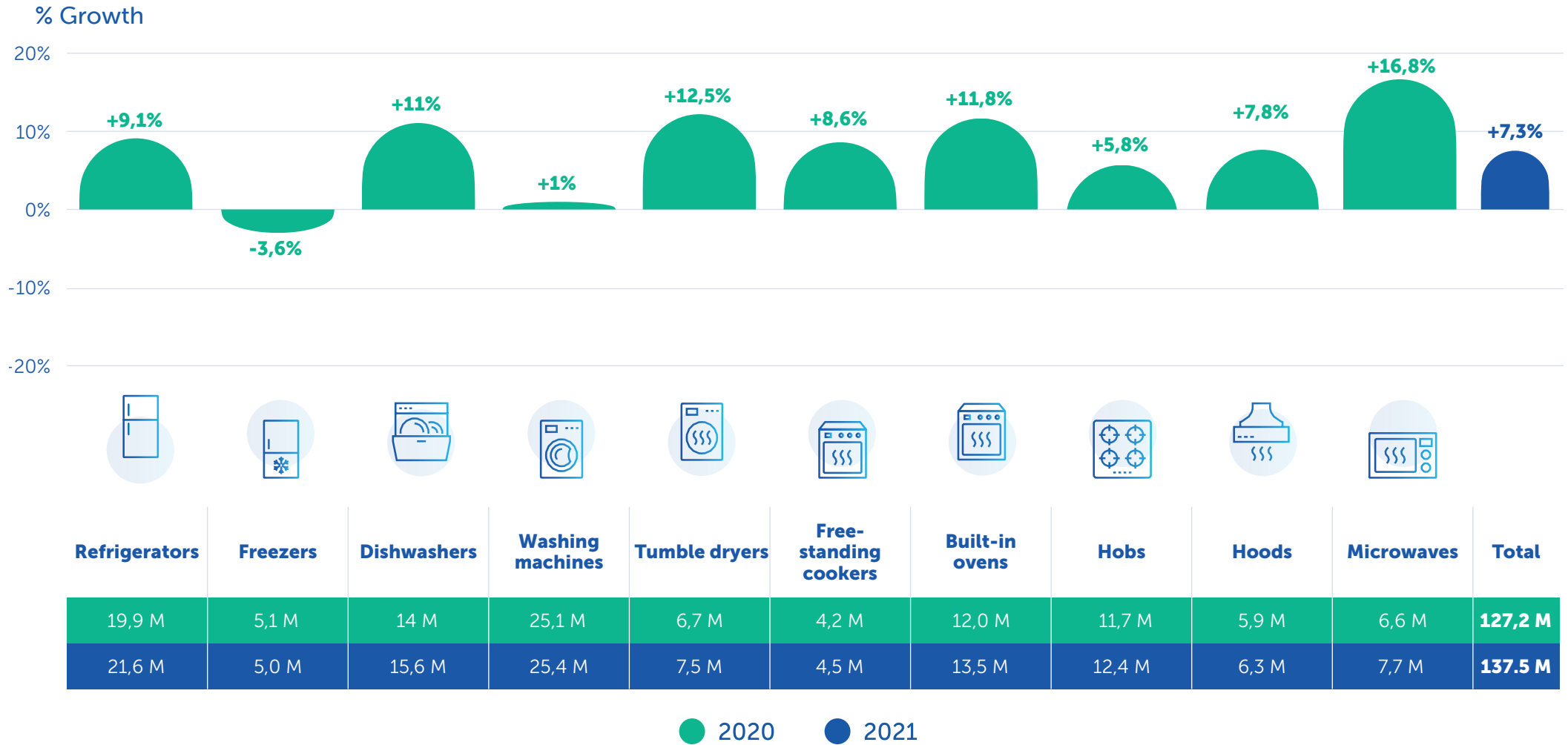
## Units traded globally, % growth in 2021



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)

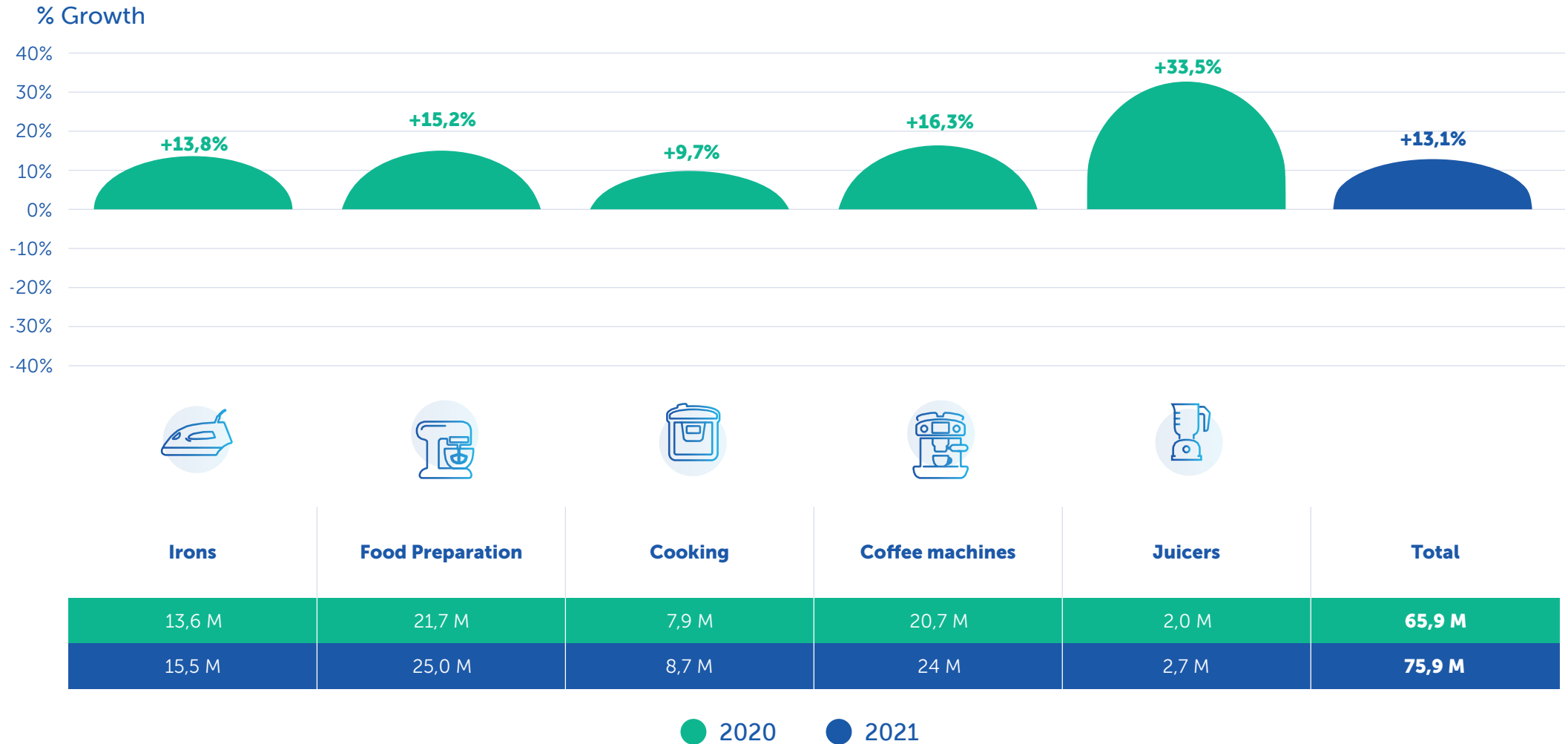
# Units traded in Europe, in 2020-2021 – large home appliances



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

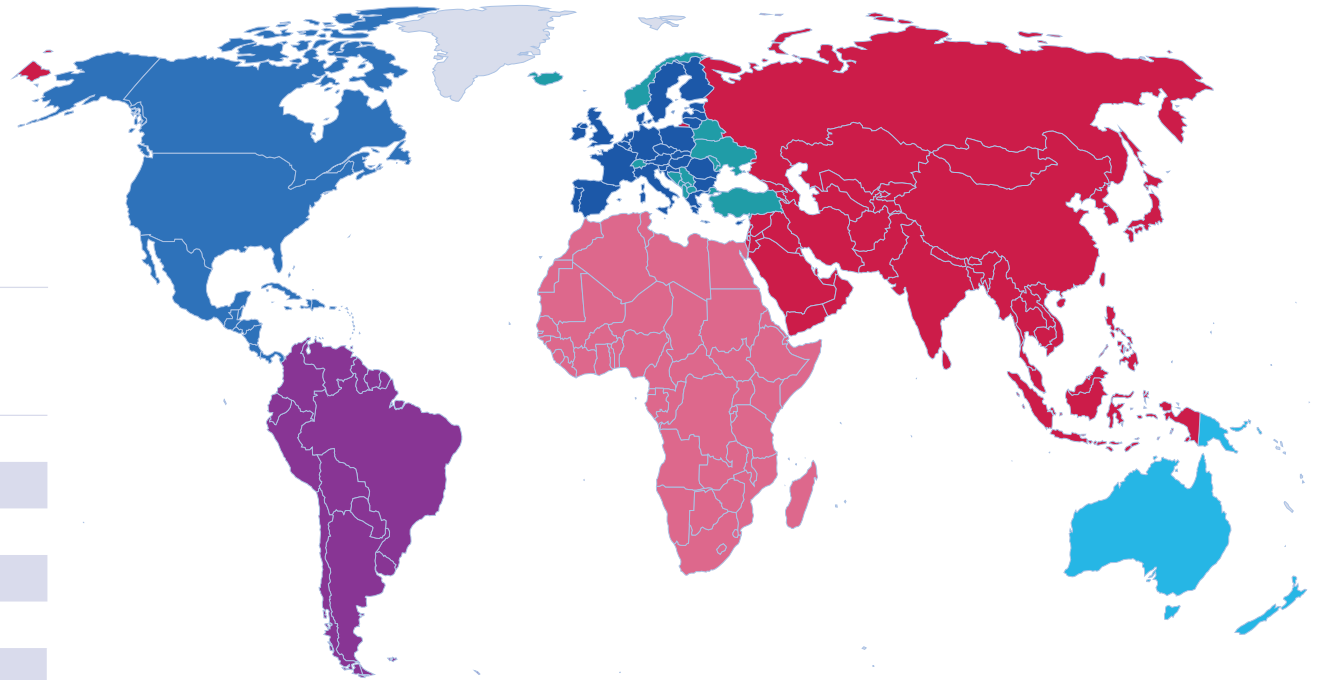
# Units traded in Europe, in 2020-2021 – small home appliances



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 2021

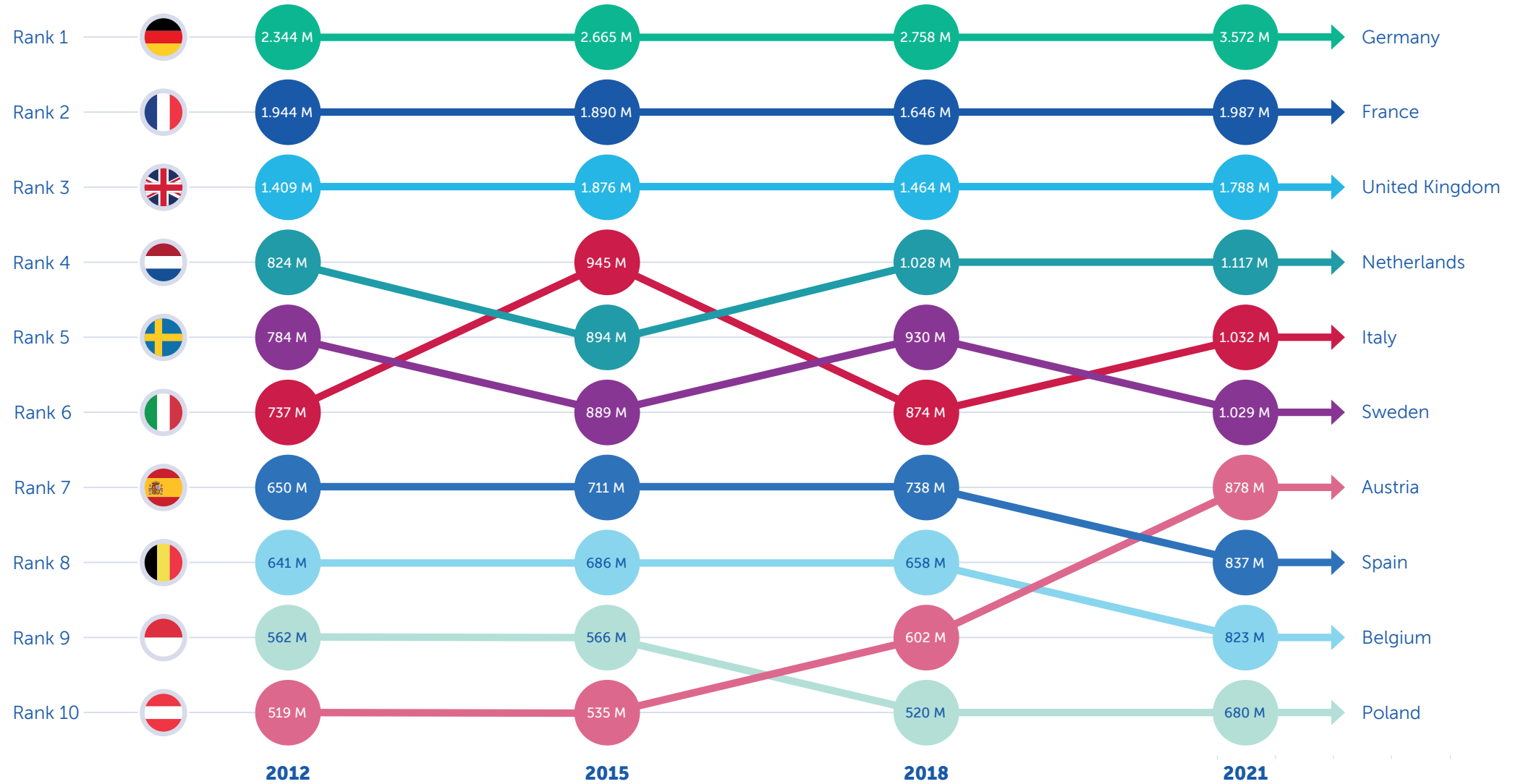


Area	Exports MDA 10	% Share
● EU28	€ 17.671 M	75,68%
● Rest of Europe	€ 2.377 M	10,18%
● Asia	€ 1.548 M	6,63%
● North America	€ 810 M	3,47%
● Oceania	€ 471 M	2,02%
● Africa	€ 363 M	1,55%
● South America	€ 102 M	0,44%

Value market share in 2021. MDA10 include refrigerators, freezers, dishwashers, washing machines, tumble dryers, free-standing cookers, built-in ovens, hobs, hoods and microwaves.

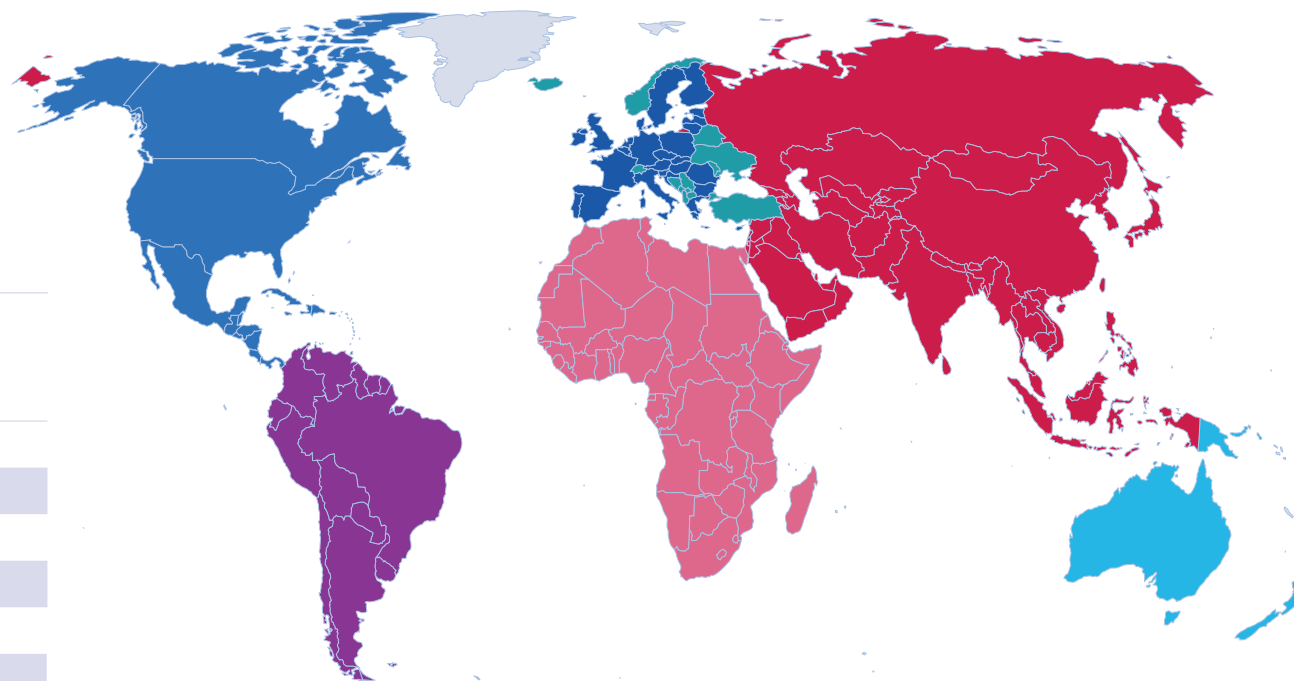
Source: Eurostat

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



Source: Eurostat

## EU exports of large home appliances, by continent, in 2021



Area	Exports SDA	% Share
● EU28	€ 15.500 M	79,92%
● Rest of Europe	€ 1.449 M	7,47%
● Asia	€ 1.248 M	6,44%
● North America	€ 800 M	4,12%
● Africa	€ 164 M	0,85%
● Oceania	€ 160 M	0,83%
● South America	€ 70 M	0,36%

Value market share in 2021. SDA include vacuum cleaners, appliances for food and beverage preparation and personal care appliances.

Source: Eurostat

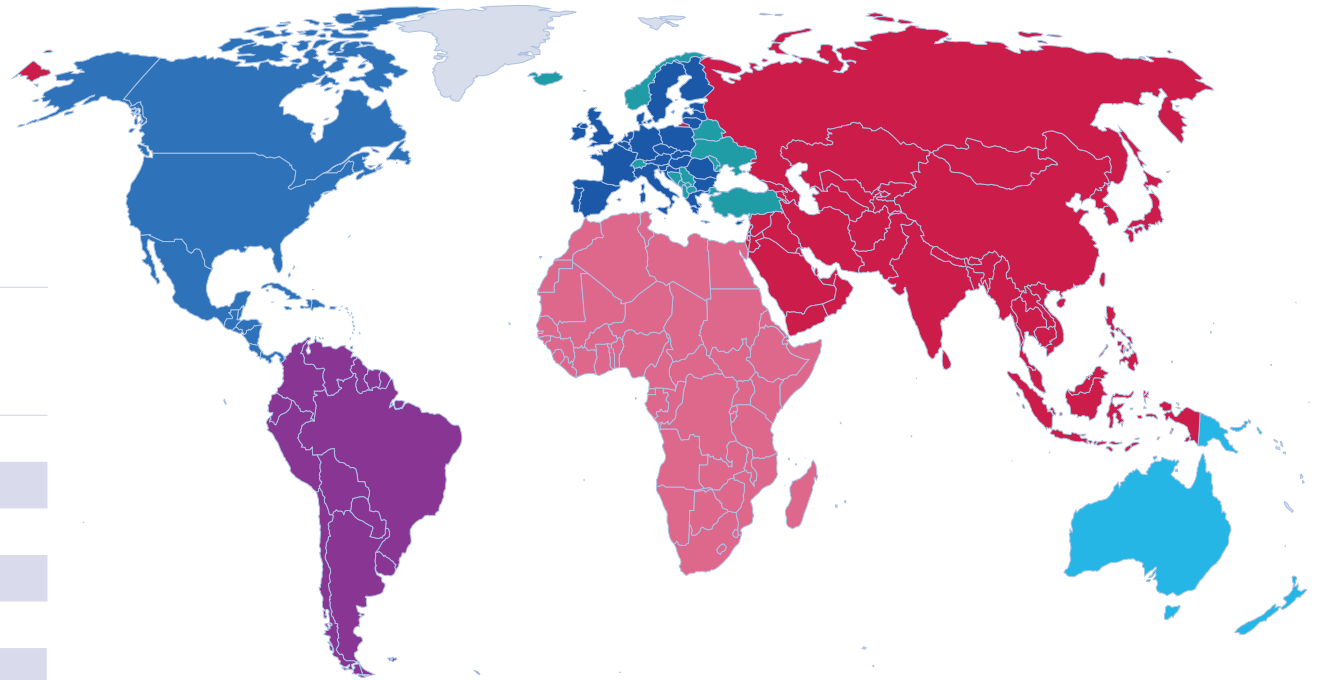
# Top 10 EU export destinations for small home appliances, throughout the years



Source: Eurostat



## EU imports of large home appliances, by continent, in 2021

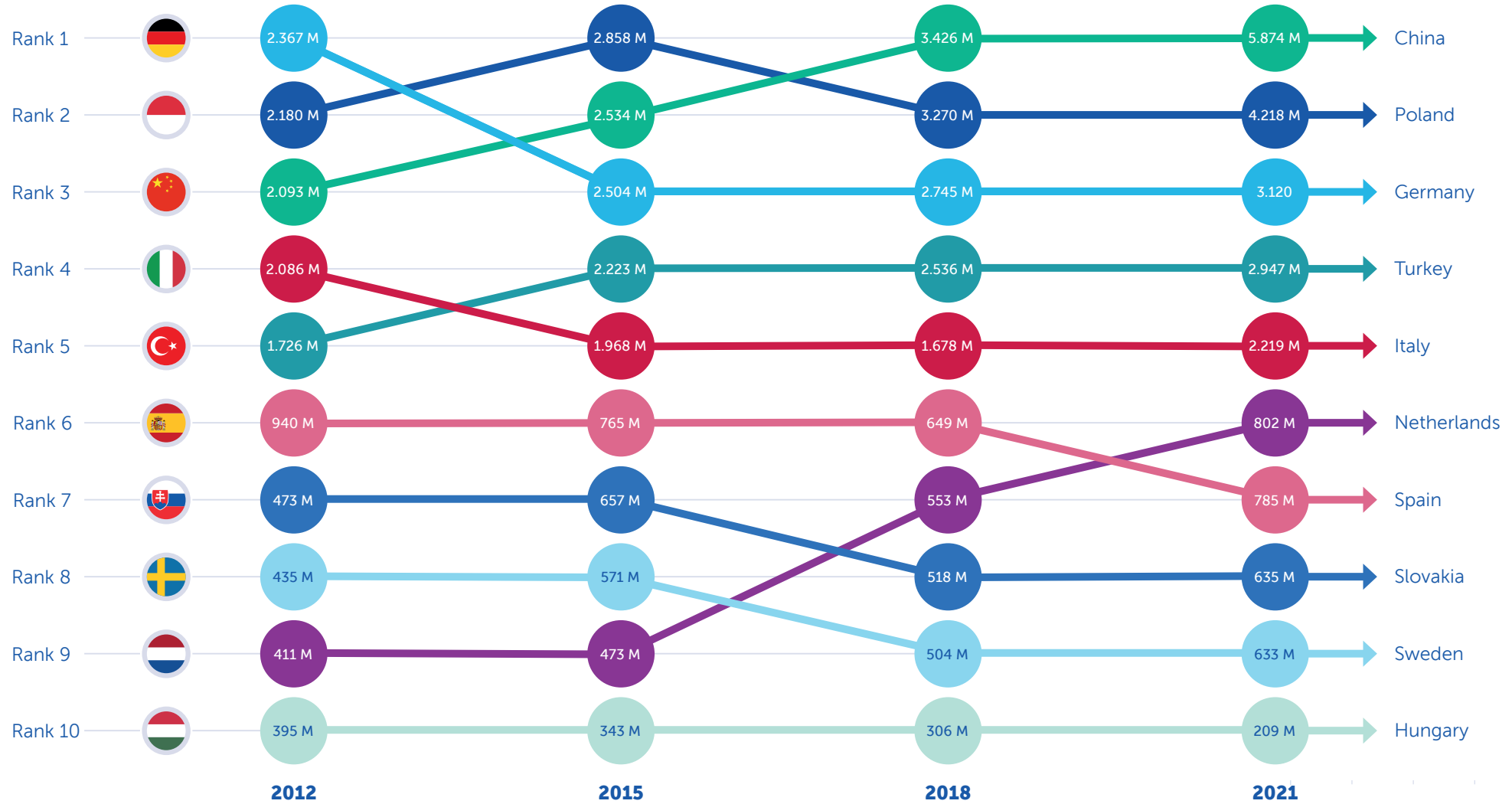


Area	Imports MDA 10	% Share
● EU28	€ 15.849 M	61,59%
● Asia	€ 9.375 M	36,43%
● Rest of Europe	€ 416 M	1,62%
● North America	€46 M	0,18%
● Africa	€ 43 M	0,17%
● South America	€ 2 M	0,01%
● Oceania	€ 1 M	0,00%

Value market share in 2021. MDA10 include refrigerators, freezers, dishwashers, washing machines, tumble dryers, free-standing cookers, built-in ovens, hobs, hoods and microwaves.

Source: Eurostat

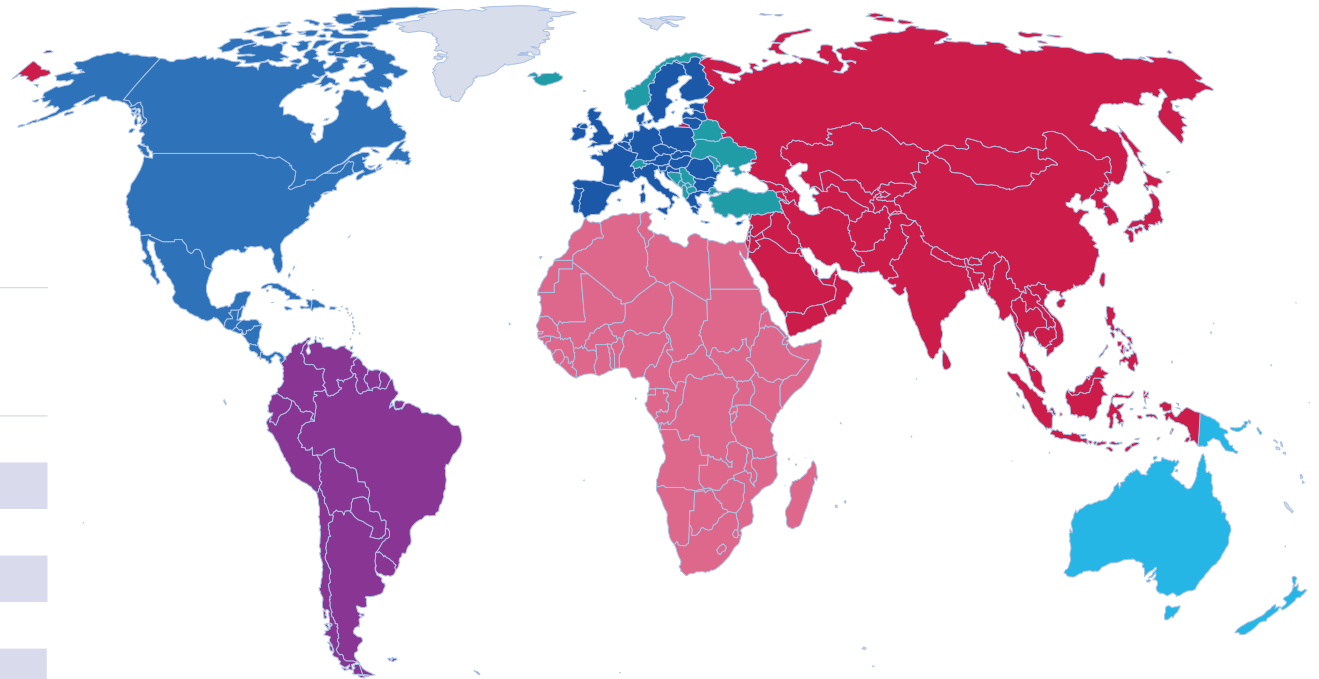
# Top 10 countries of origin for large home appliances, throughout the years



Source: Eurostat



## EU imports of small home appliances, by continent, in 2021

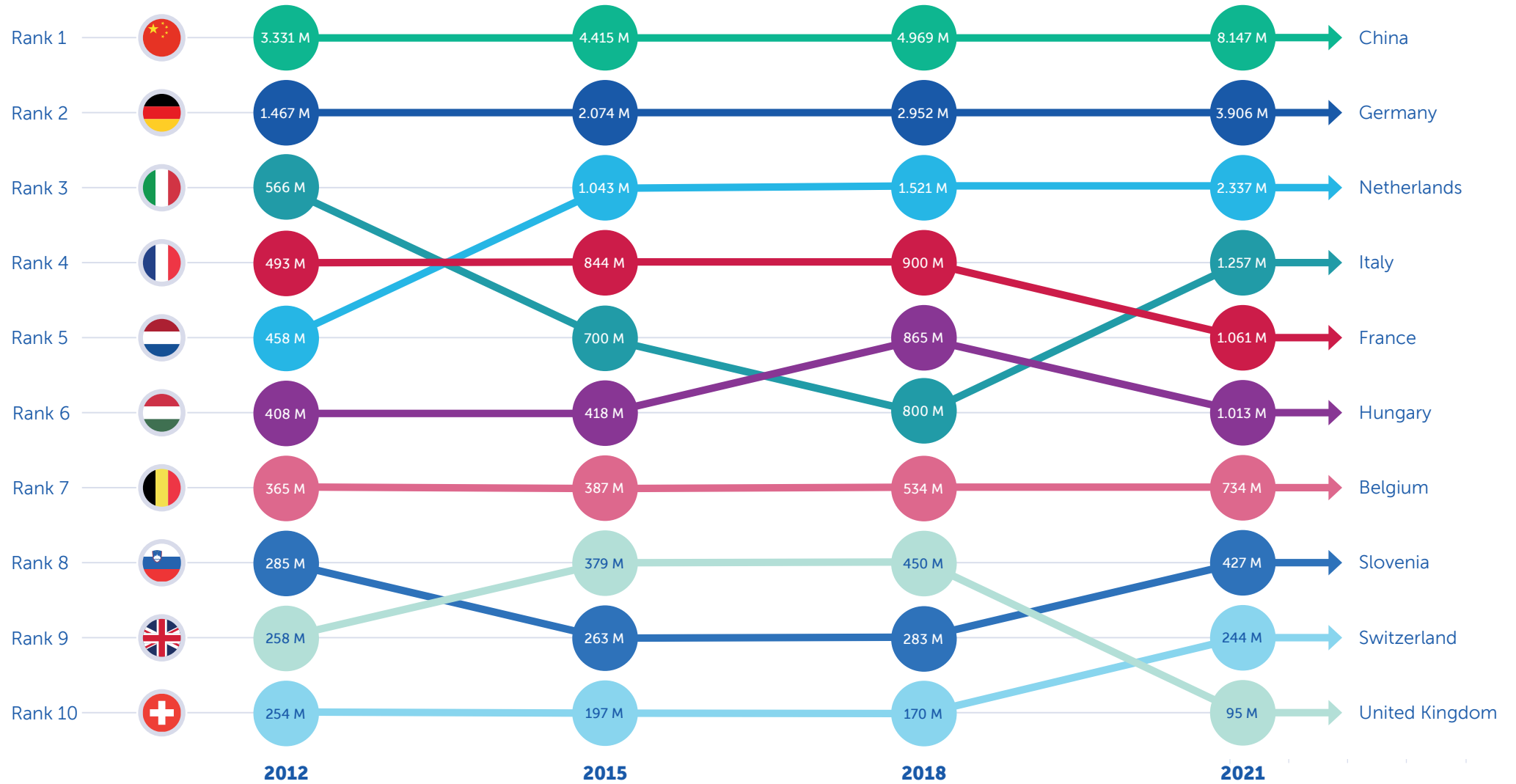


Area	Imports SDA	% Share
● EU28	€ 15.160 M	59,20%
● Rest of Europe	€ 9.621 M	37,58%
● Asia	€ 603 M	2,36%
● North America	€ 213 M	0,83%
● Africa	€ 3 M	0,01%
● Oceania	€ 2,5 M	0,01%
● South America	€ 0,8 M	0%

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



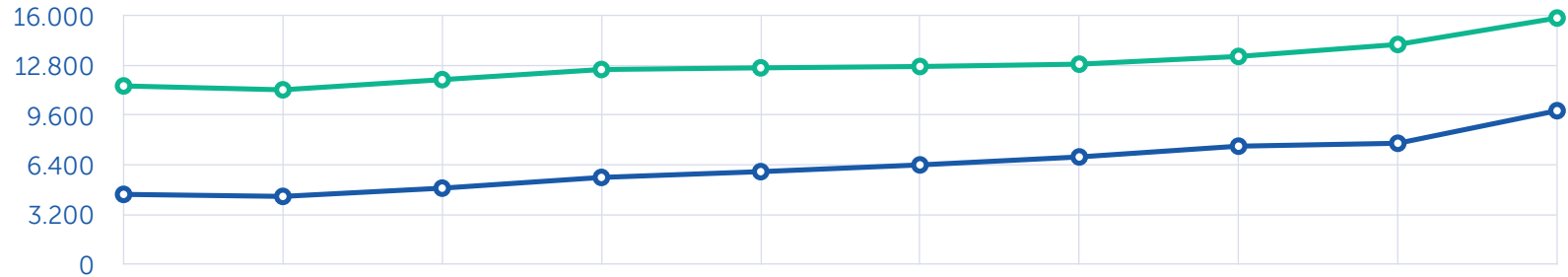
Source: Eurostat

# Import trends of large home appliances, 2012-2021



Imports in value

Millions

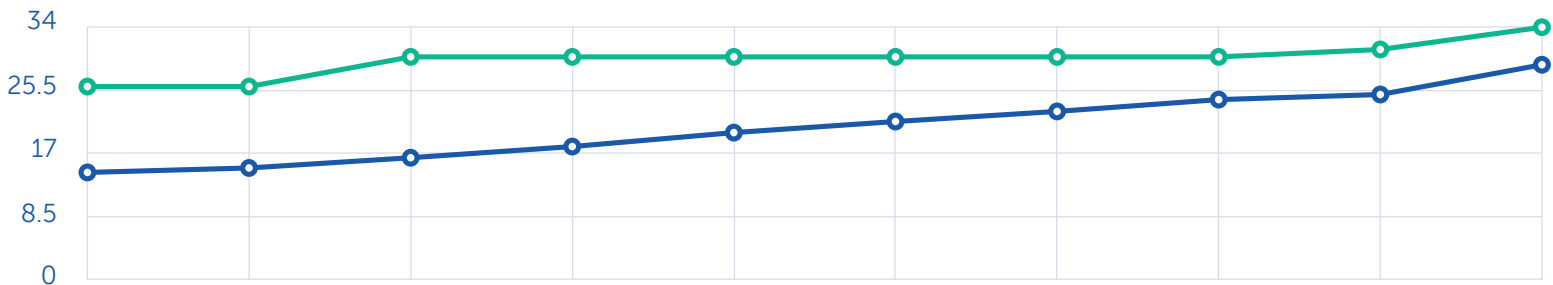


<b>Non-Eu Trade in values</b>	€ 4.498 M	€ 4.386 M	€ 4.898 M	€ 5.589 M	€ 5.961 M	€ 6.394 M	€ 6.908 M	€ 7.601 M	€ 7.787 M	€ 9.883 M
<b>Intra Eu trade in values</b>	€ 11.478 M	€ 11.229 M	€ 11.882 M	€ 12.535 M	€ 12.642 M	€ 12.728 M	€ 12.879 M	€ 13.376 M	€ 14.147 M	€ 15.849 M
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>Non Eu trade in volumes</b>	14 M	15 M	16 M	18 M	20 M	21 M	23 M	24 M	25 M	29 M
<b>Intra Eu trade in volumes</b>	26 M	26 M	30 M	30 M	30 M	30 M	30 M	30 M	31 M	34 M



Imports in volumes

Millions



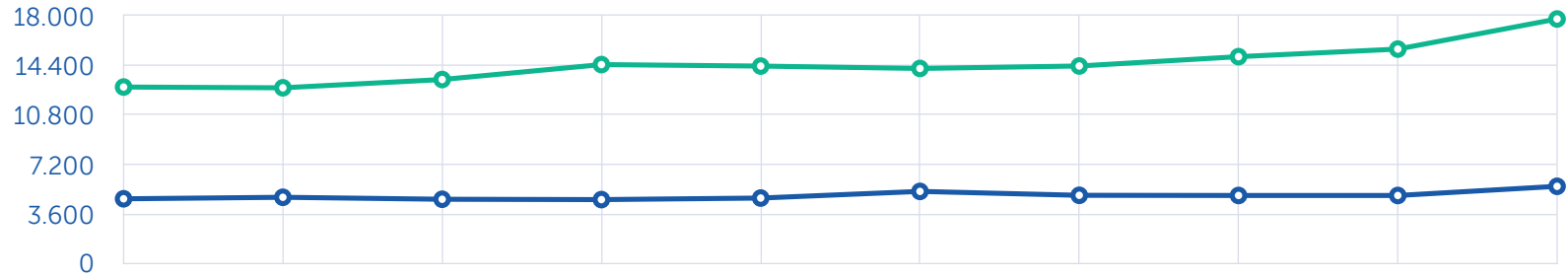
Source: Eurostat

## Export trends of large home appliances, 2012-2021



Exports in value

Millions

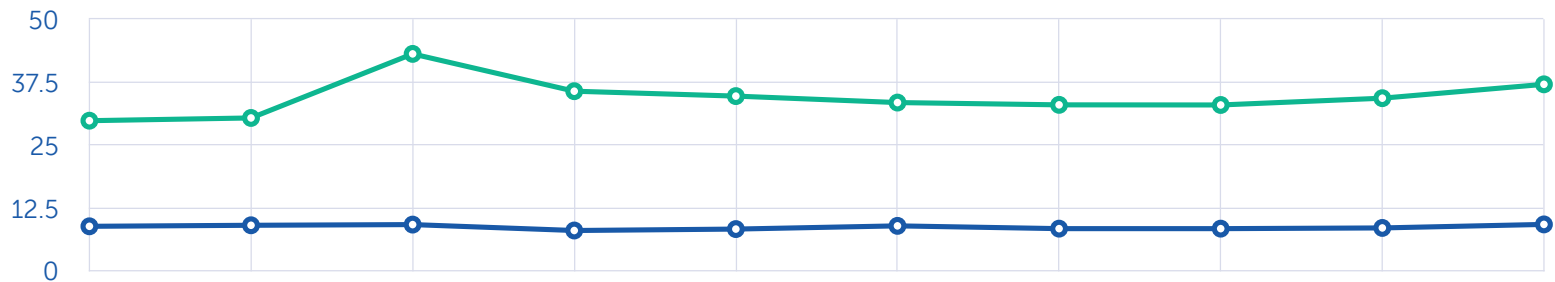


<b>Non-Eu Trade in values</b>	€ 4.712 M	€ 4.822 M	€ 4.679 M	€ 4.655 M	€ 4.766 M	€ 5.248 M	€ 4.965 M	€ 4.953 M	€ 4.952 M	€ 5.616 M
<b>Intra Eu trade in values</b>	€ 12.805 M	€ 12.750 M	€ 13.349 M	€ 14.431 M	€ 14.323 M	€ 14.152 M	€ 14.329 M	€ 15.005 M	€ 15.553 M	€ 17.733 M
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>Non Eu trade in volumes</b>	9 M	9 M	9 M	8 M	8 M	9 M	8 M	8 M	9 M	9 M
<b>Intra Eu trade in volumes</b>	30 M	30 M	43 M	36 M	35 M	33 M	33 M	33 M	34 M	37 M



Exports in volumes

Millions

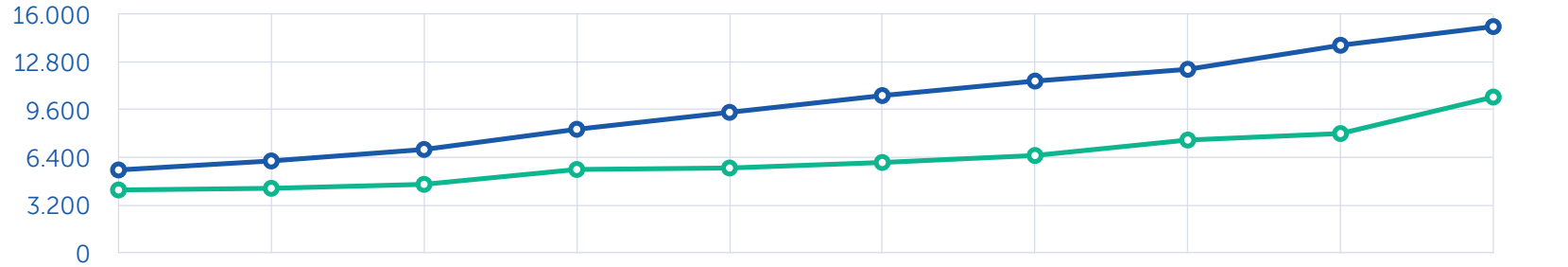


# Import trends of small home appliances, 2012-2021



Imports in value

Millions

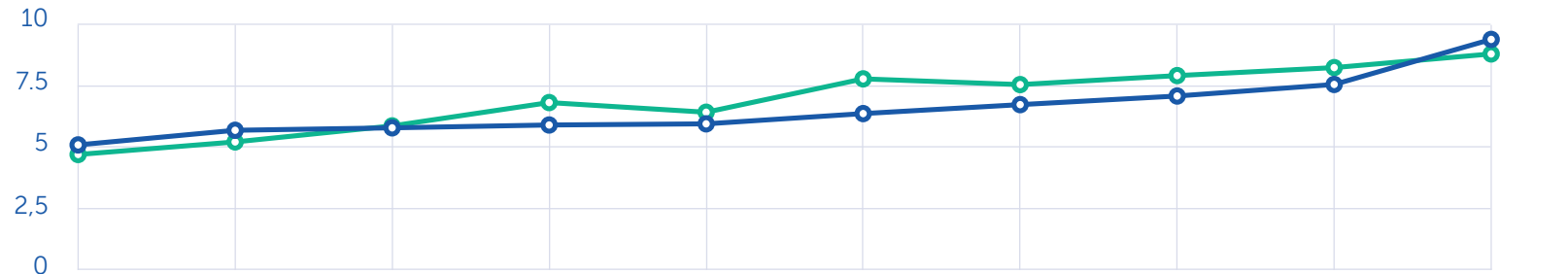


<b>Non-Eu Trade in values</b>	€ 5.557 M	€ 6.161 M	€ 6.929 M	€ 8.283 M	€ 9.419 M	€ 10.541 M	€ 11.514 M	€ 12.302 M	€ 13.912 M	€ 15.165 M
<b>Intra Eu trade in values</b>	€ 4.216 M	€ 4.326 M	€ 4.593 M	€ 5.589 M	€ 5.688 M	€ 6.057 M	€ 6.526 M	€ 7.563 M	€ 7.998 M	€ 10.442 M
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>Non Eu trade in volumes</b>	5 M	6 M	6 M	6 M	6 M	6 M	7 M	7 M	8 M	9 M
<b>Intra Eu trade in volumes</b>	5 M	5 M	6 M	7 M	6 M	8 M	8 M	8 M	8 M	9 M



Imports in volumes

Millions



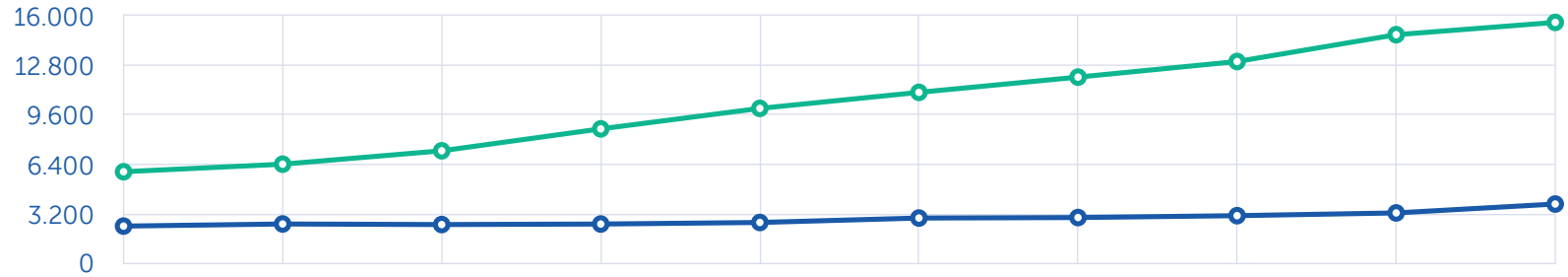
Source: Eurostat

## Export trends of small home appliances, 2012-2021



Exports in value

Millions

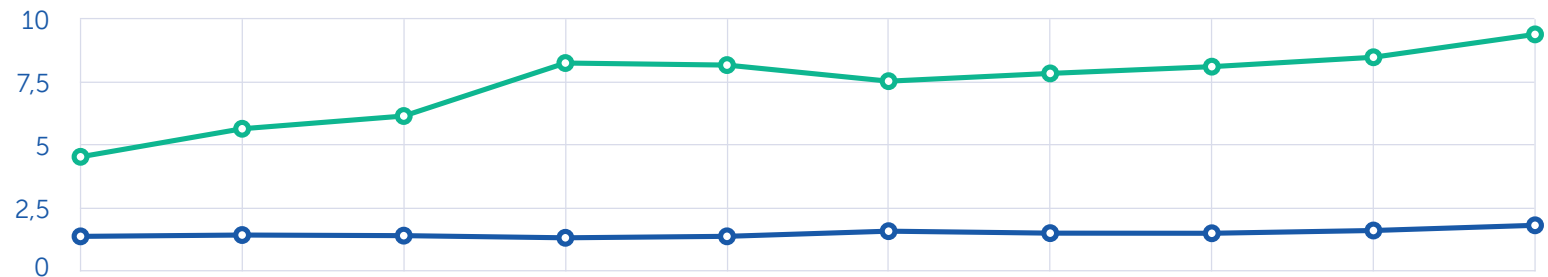


<b>Non-Eu Trade in values</b>	€ 2.432 M	€ 2.568 M	€ 2.531 M	€ 2.565 M	€ 2.665 M	€ 2.950 M	€ 2.983 M	€ 3.103 M	€ 3.279 M	€ 3.852 M
<b>Intra Eu trade in values</b>	€ 5.931 M	€ 6.417 M	€ 7.278 M	€ 8.690 M	€ 10.008 M	€ 11.040 M	€ 12.021 M	€ 13.025 M	€ 14.751 M	€ 15.543 M
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>Non Eu trade in volumes</b>	1 M	1 M	1 M	1 M	1 M	2 M	2 M	1 M	2 M	2 M
<b>Intra Eu trade in volumes</b>	5 M	6 M	6 M	8 M	8 M	8 M	8 M	8 M	8 M	9 M



Exports in volumes

Millions

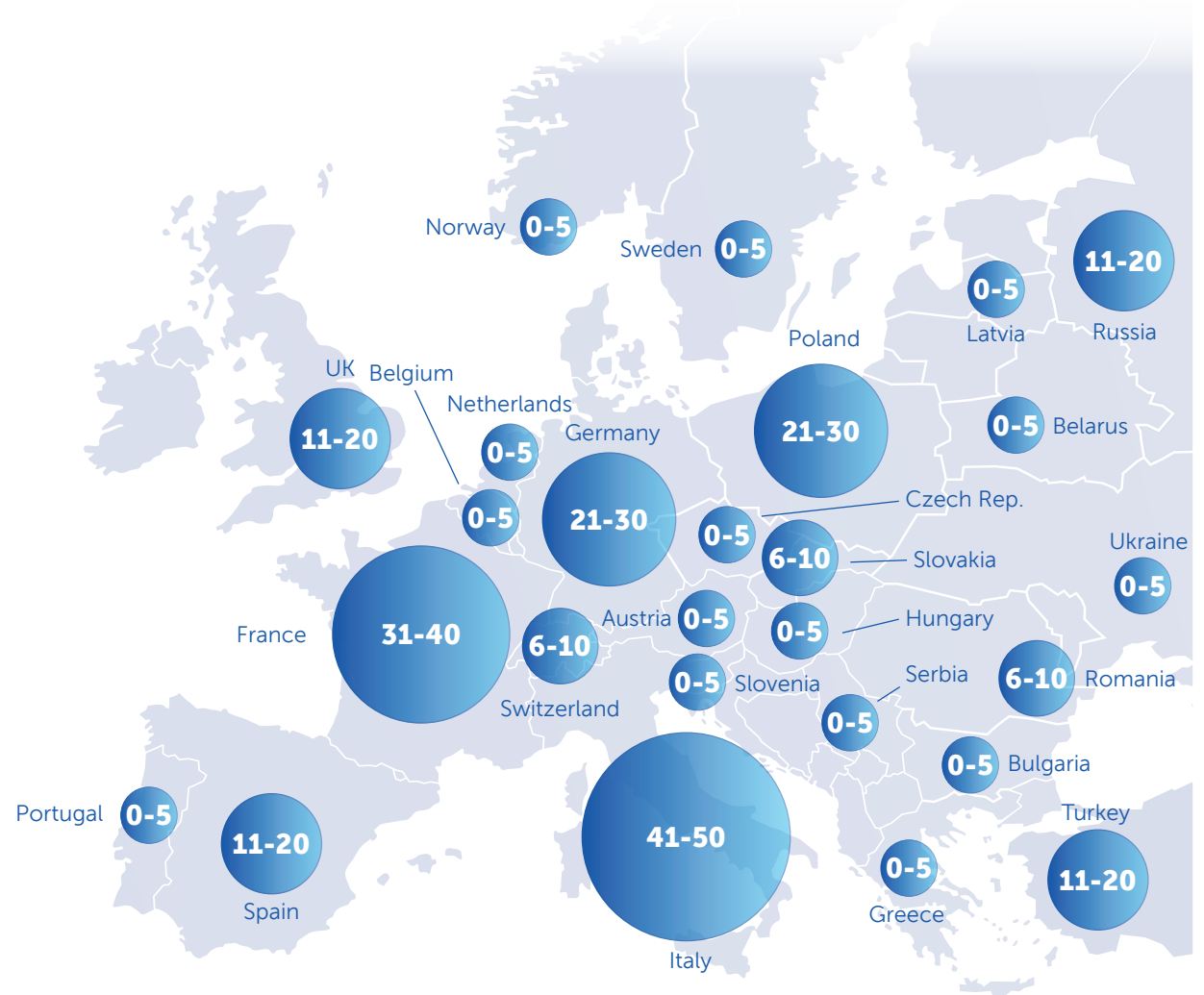


Source: Eurostat



# APPLiA Direct Members' Manufacturing Sites in Europe, in 2021

Country	Number of manufacturing sites	Scale
Austria	3	0-5
Belarus	3	0-5
Belgium	3	0-5
Bulgaria	3	0-5
Czech Rep.	4	0-5
Denmark	2	0-5
France	36	31-40
Germany	26	21-30
Greece	3	0-5
Hungary	2	0-5
Italy	42	41-50
Latvia	1	0-5
Netherlands	2	0-5
Norway	1	0-5
Poland	21	21-30
Portugal	1	0-5
Romania	9	6-10
Russia	13	11-20
Serbia	3	0-5
Slovakia	6	6-10
Slovenia	5	0-5
Spain	13	11-20
Sweden	1	6-10
Switzerland	7	6-10
Turkey	15	11-20
UK	12	11-20
Ukraine	3	0-5



Source: APPLiA Membership

# Full version available online now at:

<https://www.statreport2021applia-europe.eu>



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