

Professional
heritage

Alberto Zanata
Head of Professional
Products

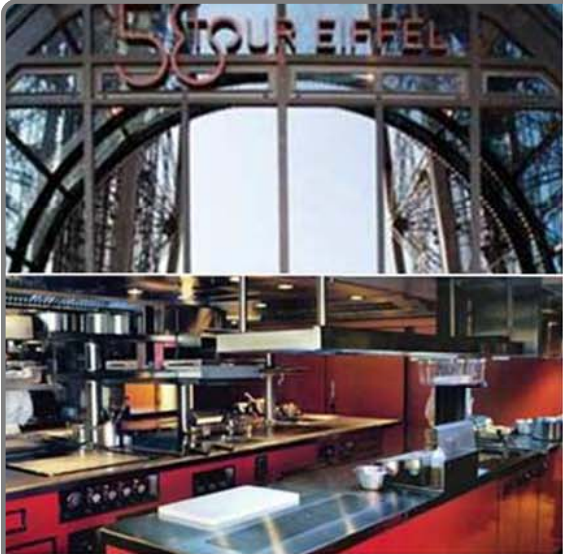


Electrolux



Thinking of you
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Electrolux professional business operations

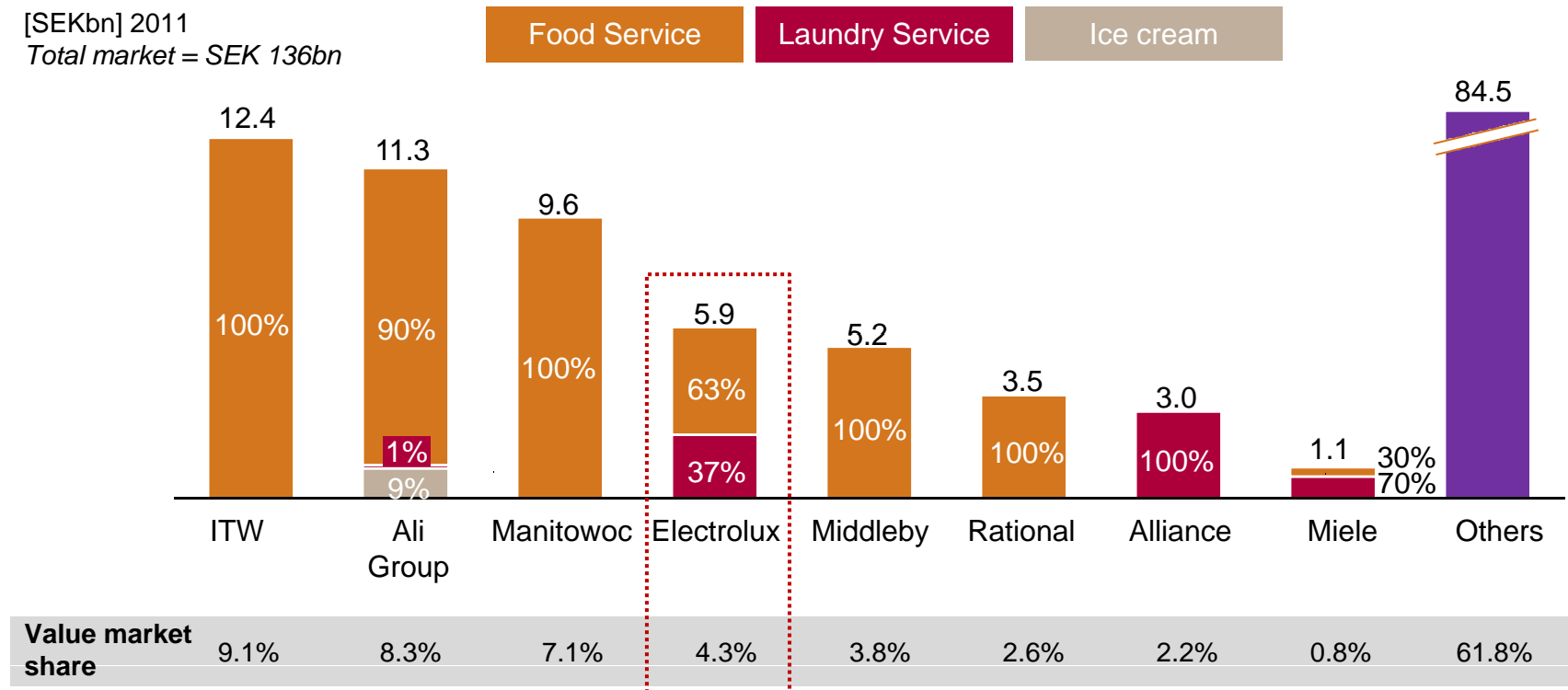


Key player in the global market



Professional appliance sales by company and product type

[SEKbn] 2011
Total market = SEK 136bn



Electrolux Professional country mix



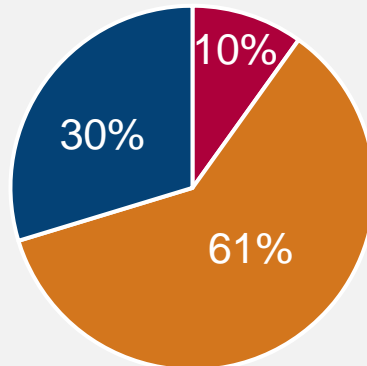
2011

Global Market

Electrolux Net sales

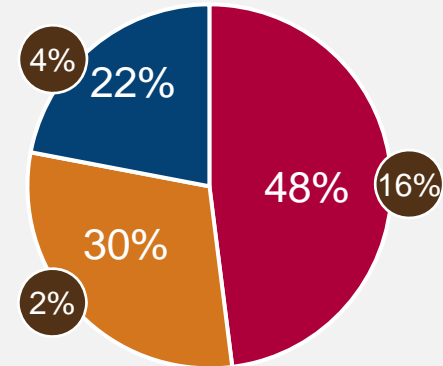
FOOD SERVICE

SEK 116bn



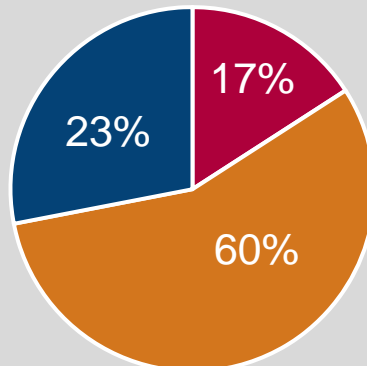
SEK 3.7bn

Global market share **3.2%**



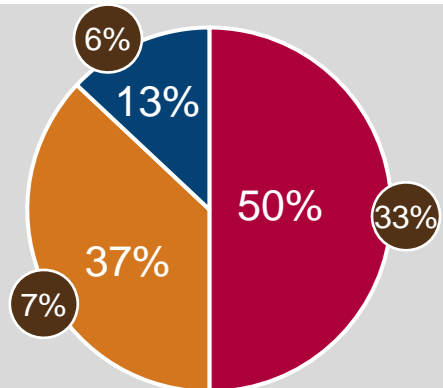
LAUNDRY

SEK 21bn



SEK 2.2bn

Global market share **10.8%**



Western Europe

Other Western countries

Emerging markets

Trends in the professional food and laundry industry



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Trends impacting the industry



Growing demand in emerging markets

Major appliances for laundry entering the professional market

New trends in eating out impacting the food service industry

Consumers inspired by professionals

Trends



Growing demand but Southern Europe impacted by the recession

Institutions and government spending declining

Change in user habits



**Electrolux Professional
- Performance**



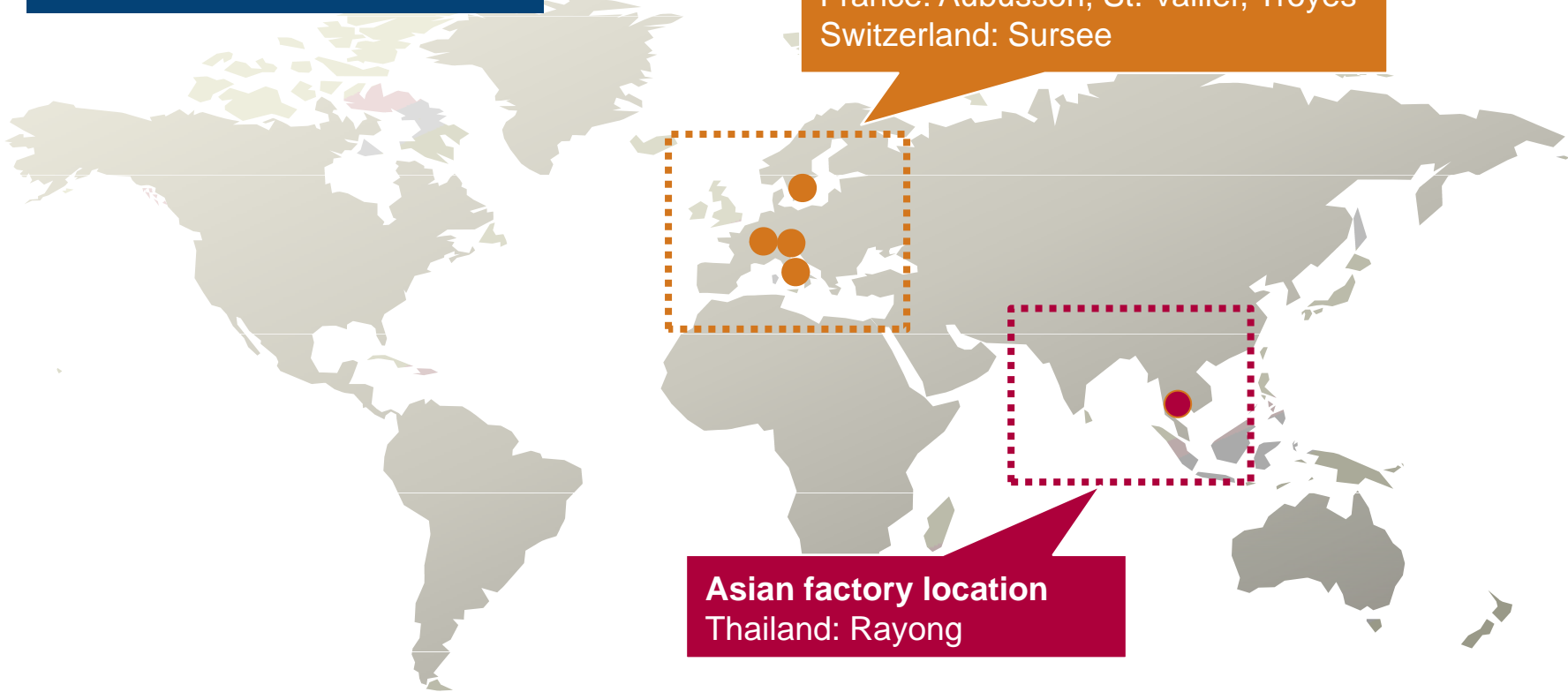
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Electrolux Professional Locations



Sales & service in over 100 countries

European factory locations
Italy: Vallenoncello
Sweden: Ljungby
France: Aubusson, St. Vallier, Troyes
Switzerland: Sursee

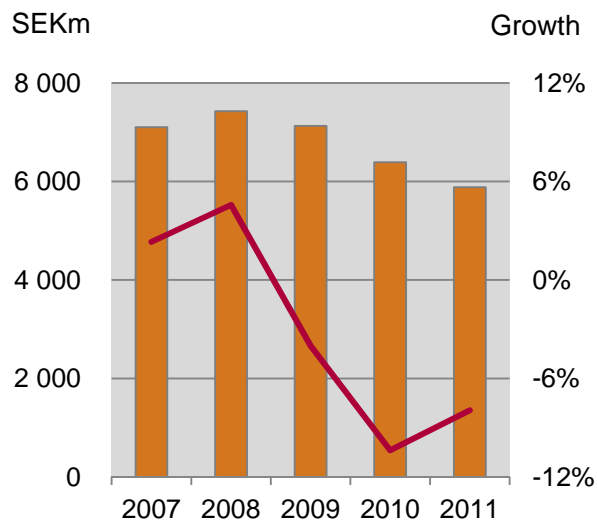


Asian factory location
Thailand: Rayong

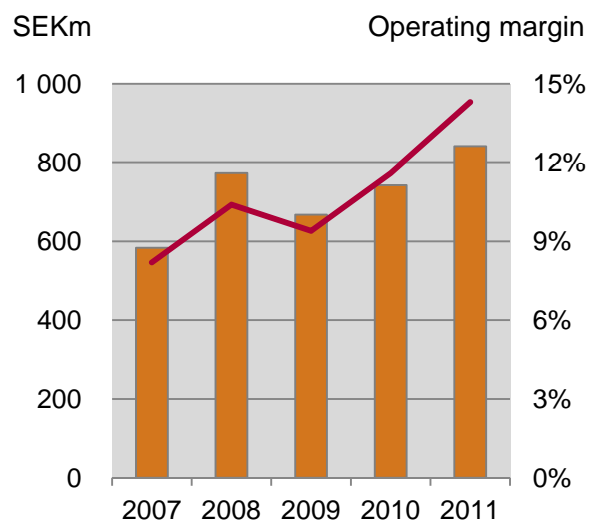
A stable financial performance



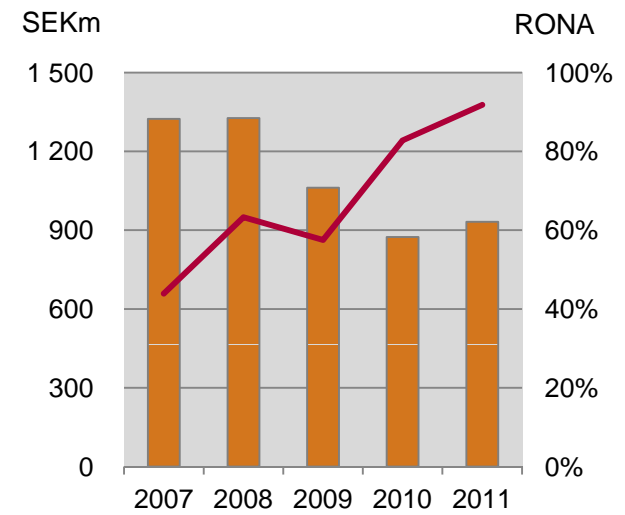
Net sales



Operating income



Net assets and RONA



Electrolux Professional strengths & uniqueness



The Brand

Electrolux is the **#1 brand worldwide**.
The only full system solution provider.

Leadership in innovation

Electrolux is known to be the **industry leader** in providing innovative solutions. Electrolux is a synonym for “**Green**” solutions.

Global presence in projects

Electrolux is the only company able to provide **both Food Service and Laundry** equipment for large projects worldwide.

Growth opportunities



Possibilities to further grow in:

Quick-service restaurants and full-service restaurant chains thanks to innovative solutions and “green” approach in manufacturing and product performances.

Emerging markets thanks to the development of the already served international hotel chains and international consultants with global influence looking for “one stop shop” both from product and, mainly, service sides.

Commercial laundry thanks to the unique solution offer and customer segment specialization.

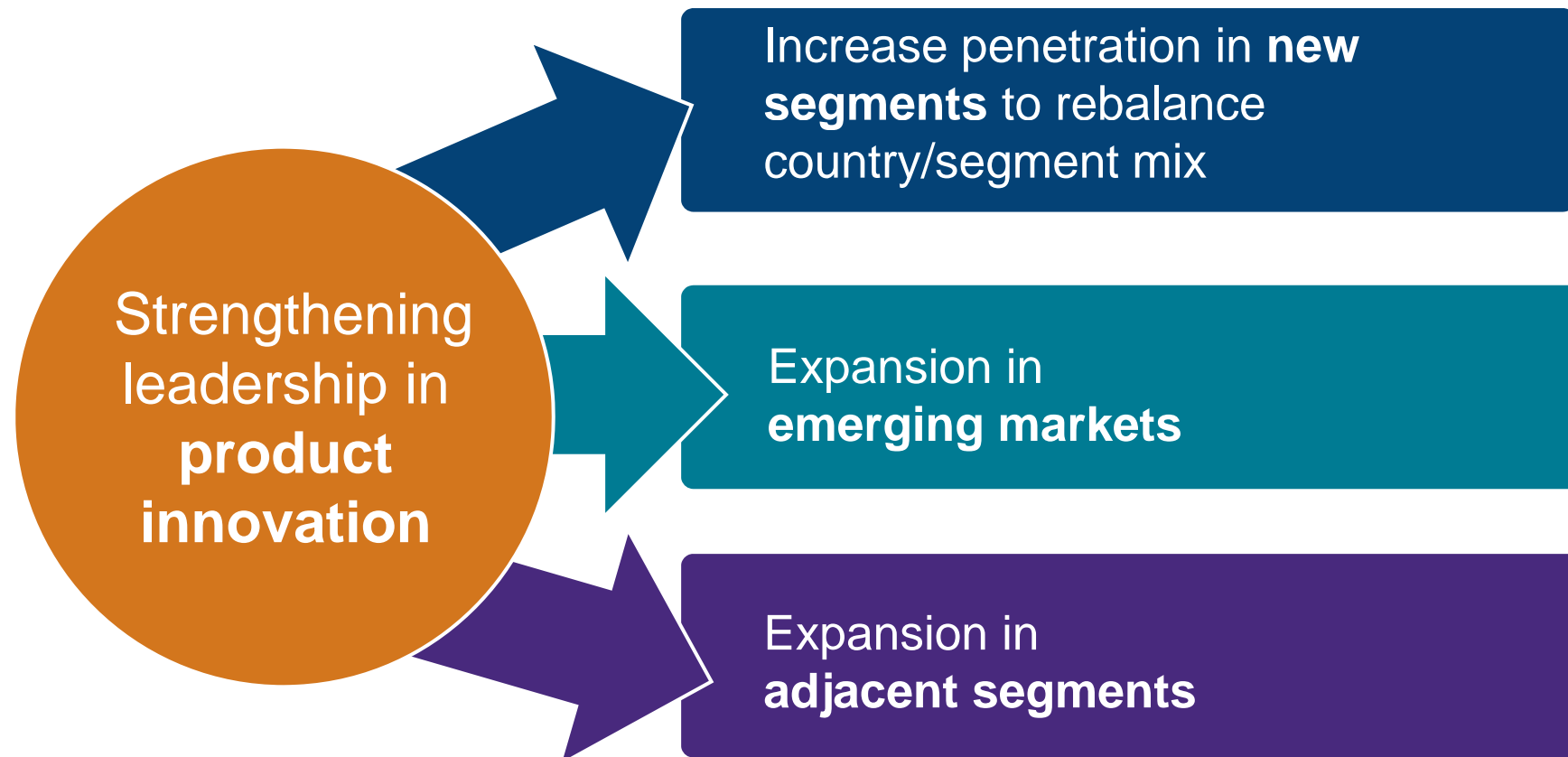
Our strategy in the Professional business

Profitable growth 2011 - 2015



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Strategy to grow

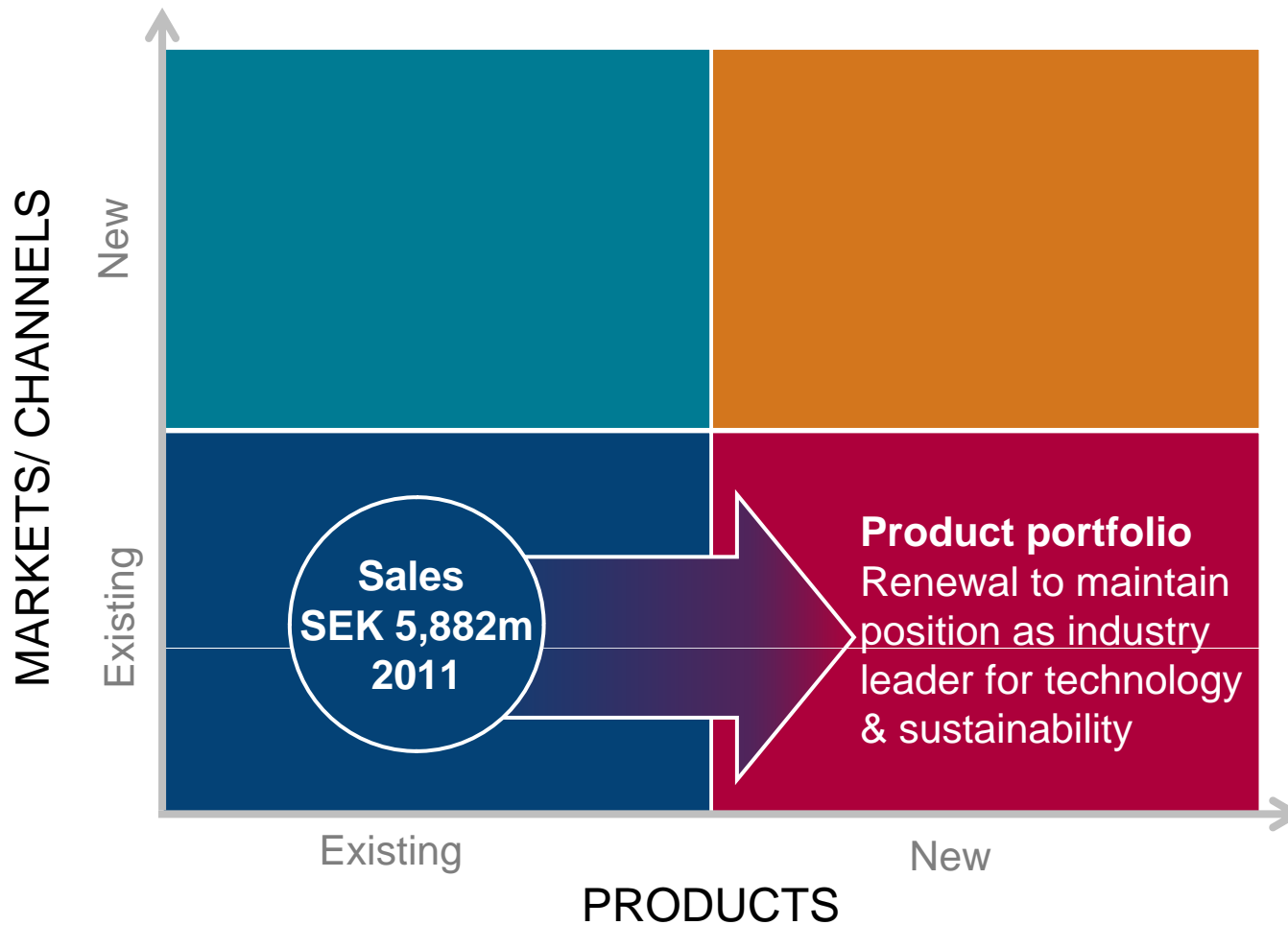


These investments will be financed through product-cost and other cost-reduction initiatives.

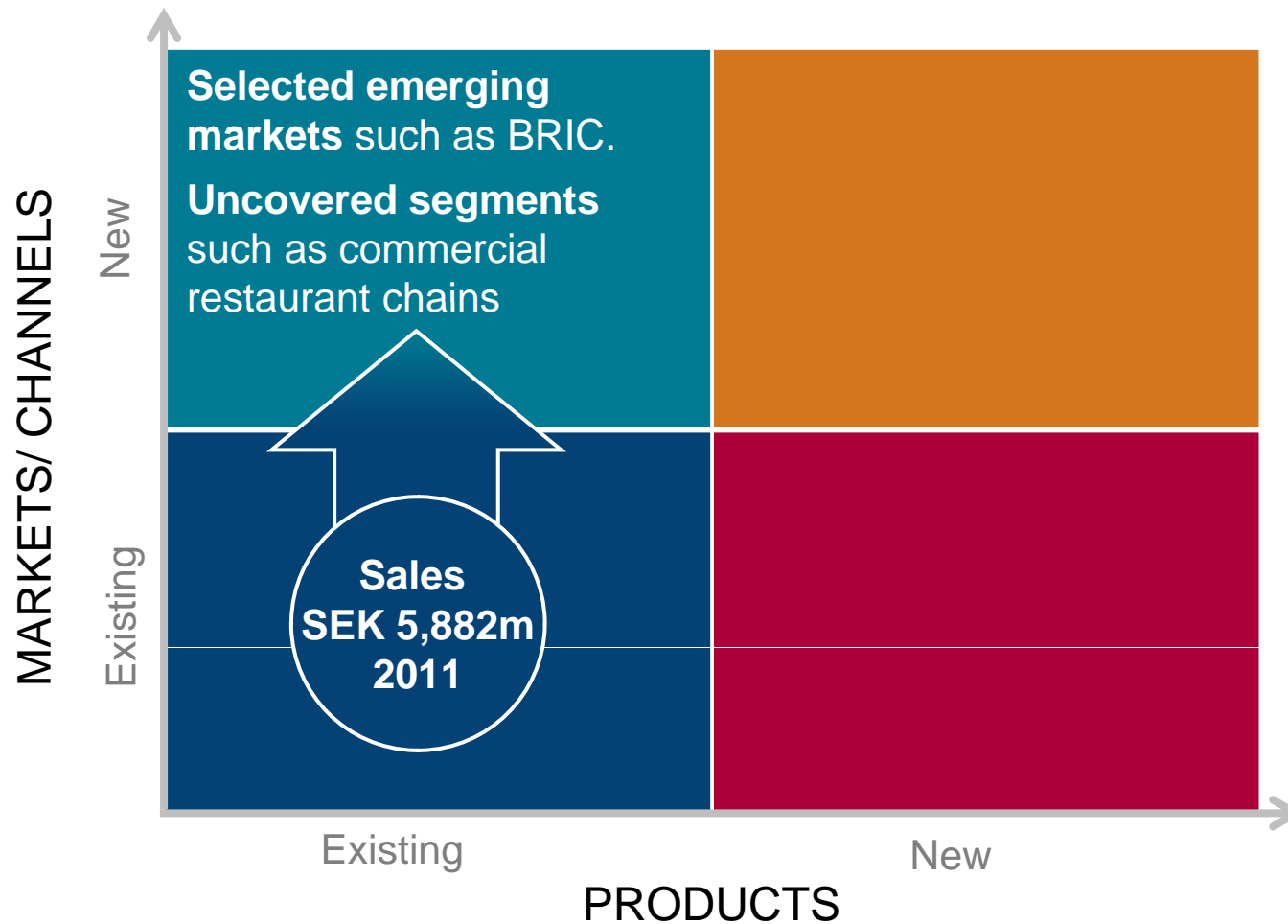
Innovative products to be launched



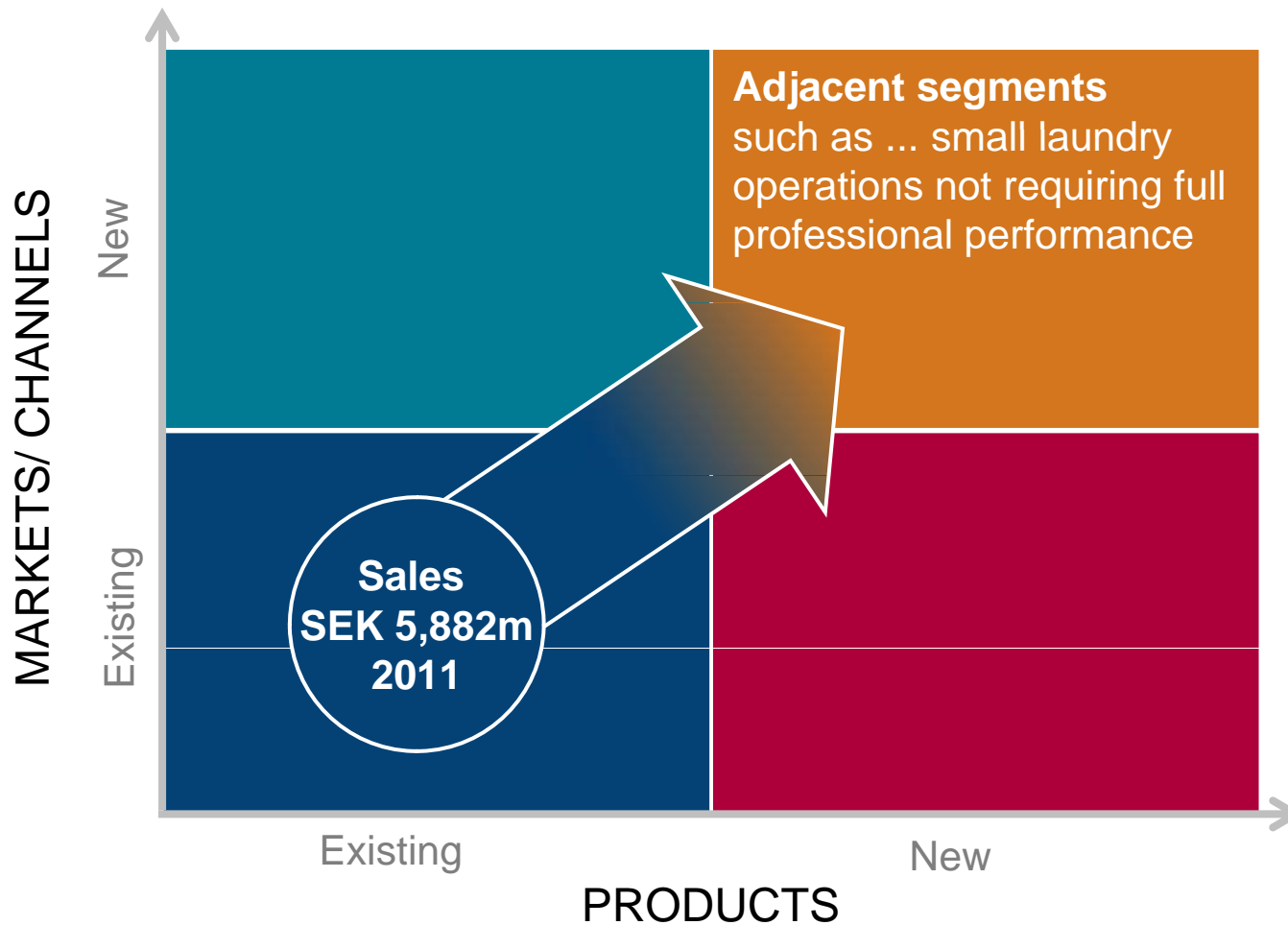
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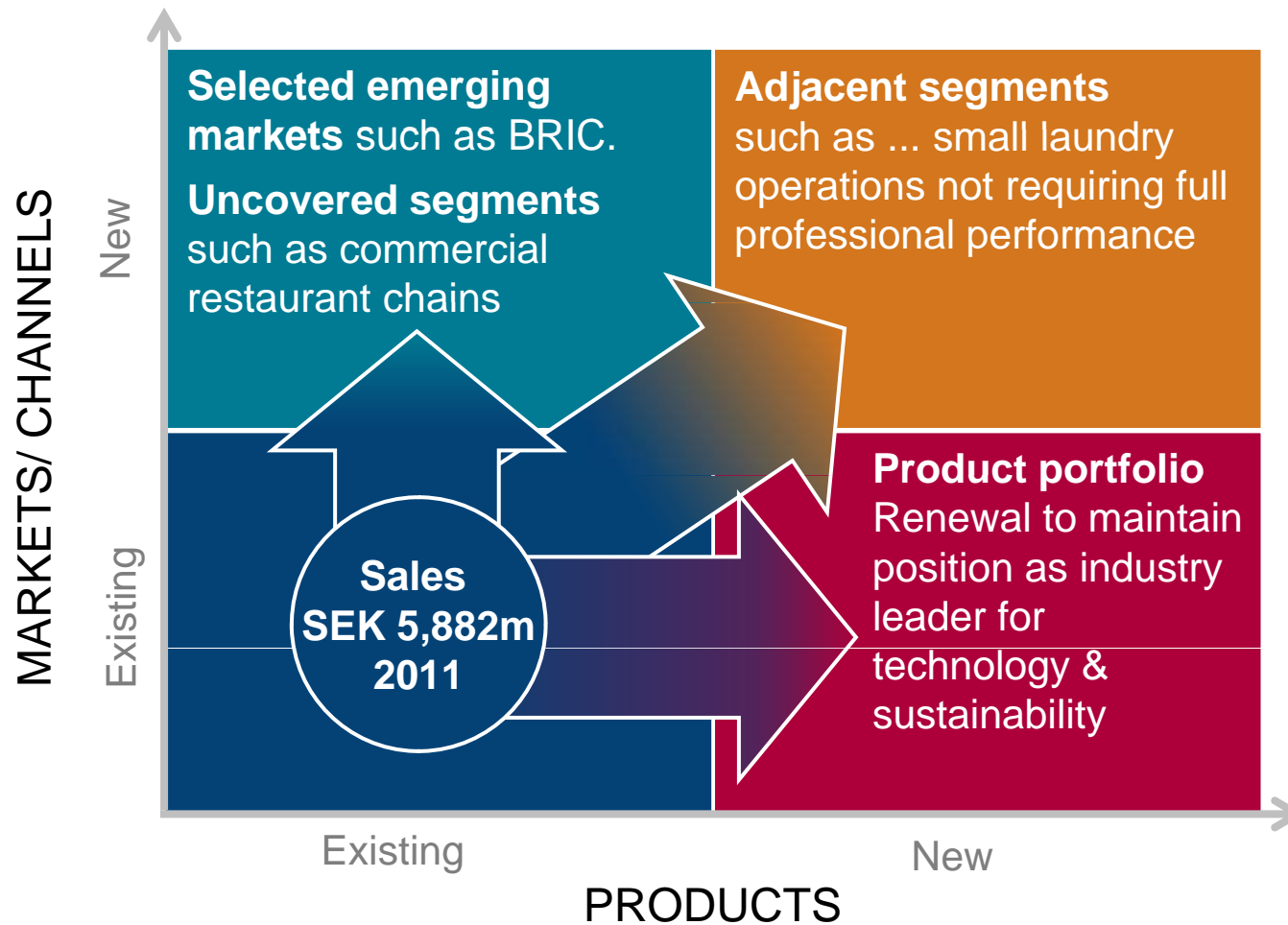
Expansion in new segments and markets



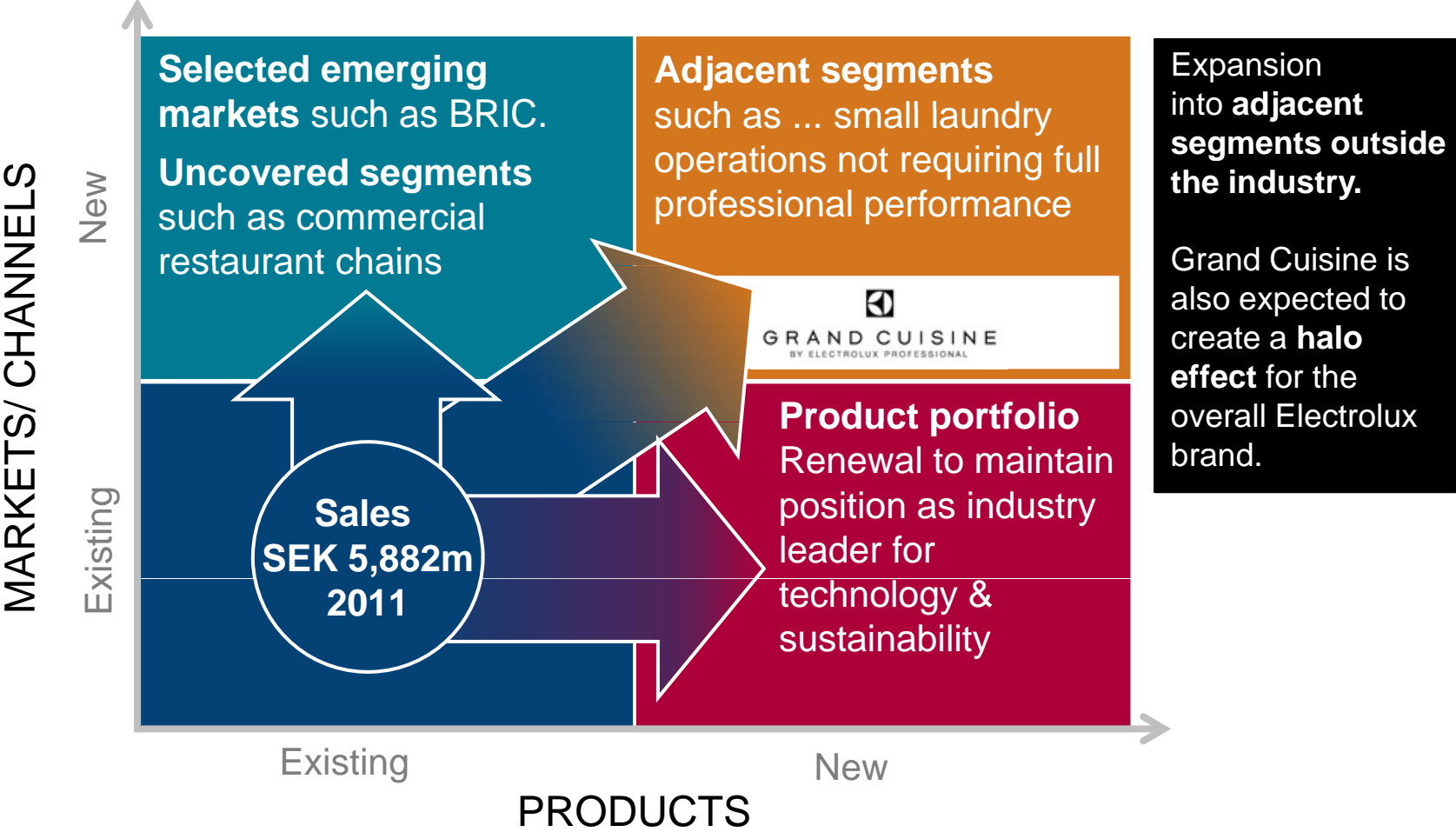
Expansion in adjacent segments



Professional strategy Overall summary



Entering a new segment



Strategy to enter a new customer segment in the consumer industry
Electrolux Grand Cuisine



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Consumer target



ENTERTAINERS

EMOTIONAL BENEFIT
Absolute Confidence

FUNCTIONAL BENEFIT
Effortless Excellence



FOODIES

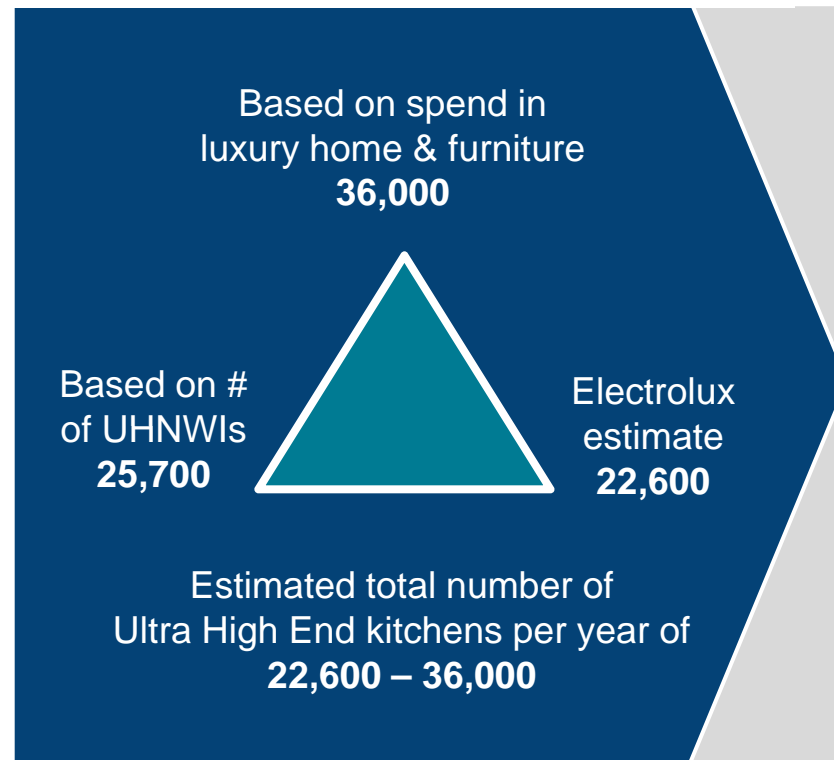
EMOTIONAL BENEFIT
Absolute Empowerment

FUNCTIONAL BENEFIT
Ultimate Capabilities

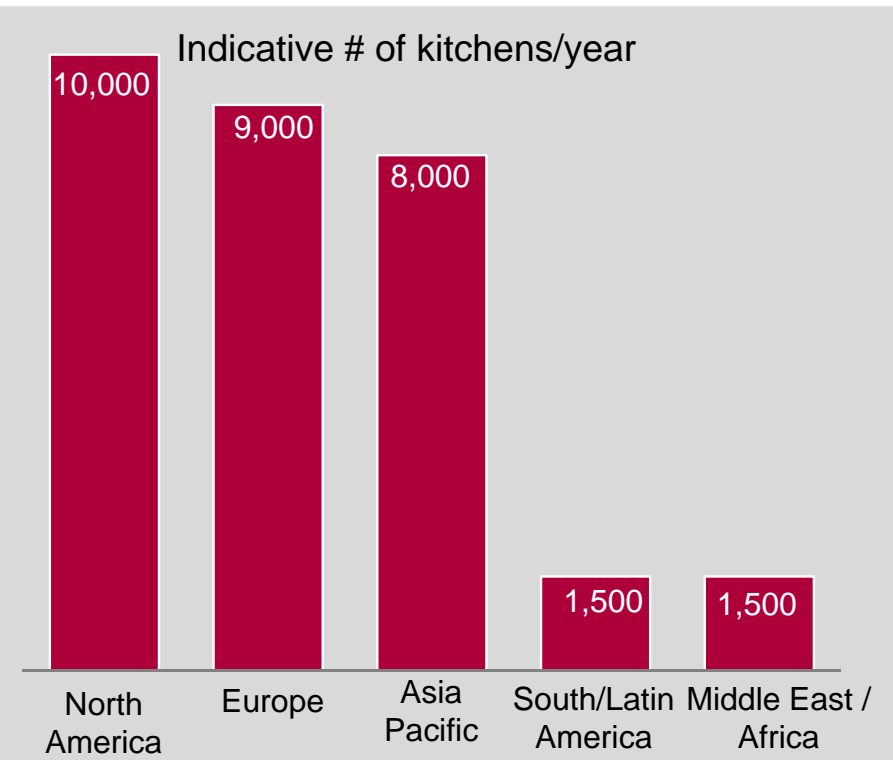
Luxury kitchen market up to 50,000 kitchens/year



Average market size of ~30,000 kitchens

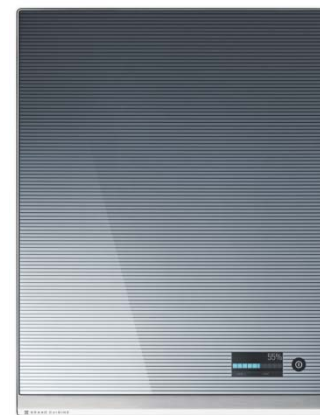


North America and Europe with most potential

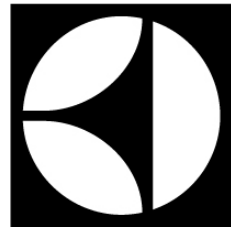


Based on that Ultra High Net Worth Individuals (UHNWI) own 2.5 apartments on average and that kitchen is remodeled/renovated every 10th year.
Source: IPSOS market research 2009-2011; "World Wealth Report 2011" (Merrill Lynch); "World Wide Markets Monitor" (Altgamma); "The Wealth Report 2011" (Knight Frank); Expert Interviews; BCG analysis.

Cooking system



Many **innovative technologies are born in the Professional industry** where performance can justify higher prices and costs. These technologies can be adapted to the consumer market resulting in products with great functionality and competitive advantages.



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