



Electrolux

Electrolux
Capital Markets Day
Australia & New Zealand

Mike Putt, Managing Director
February 24, 2016

Key Message

Electrolux is strengthening our leadership in ANZ through our **strong brand portfolio** and focus on remarkable **consumer experience**



ANZ Market
and
Business

Electrolux
Leadership

Key Success
Factors

Strategic
Focus Area

Electrolux Major Appliances

Australia & New Zealand

People
1,100
In 2 Countries

Net Sales
780m
AUD

EBIT
87m
AUD
11.2% EBIT Margin

Annual
Shipments
1.6m
Units

Australia and New Zealand

Land area	AU	7.7kmsq
	NZ	0.3kmsq
	US	9.5kmsq

Population	AU	23.5M
	NZ	4.4M
	US	321.5M

Avg person/household	AU	2.6
	NZ	2.5
	US	2.6

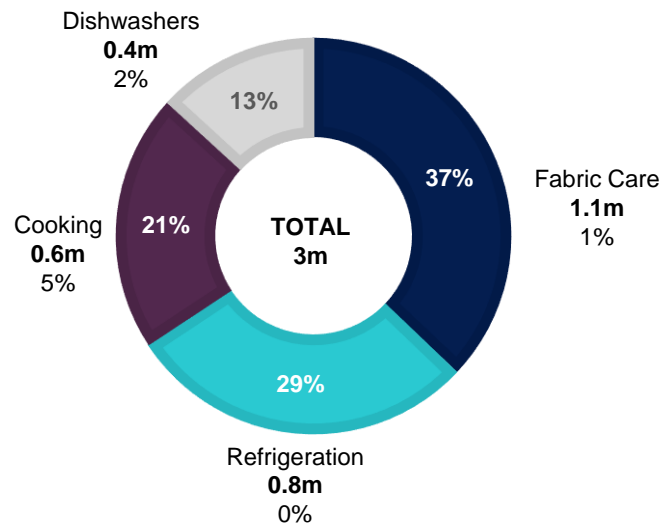
GDP/capita	AU	46K
	NZ	25K
	US	54K



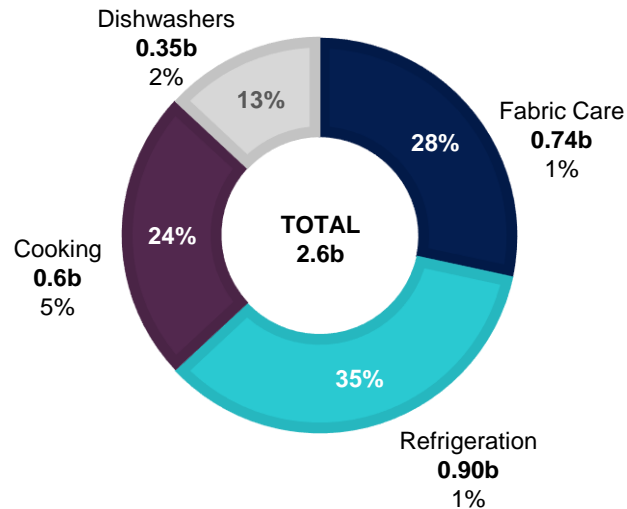
Australia Core Appliance Market

2015 Shipments

CORE WHITE SELL-IN
MILLION UNITS 2015 GROWING ~2%

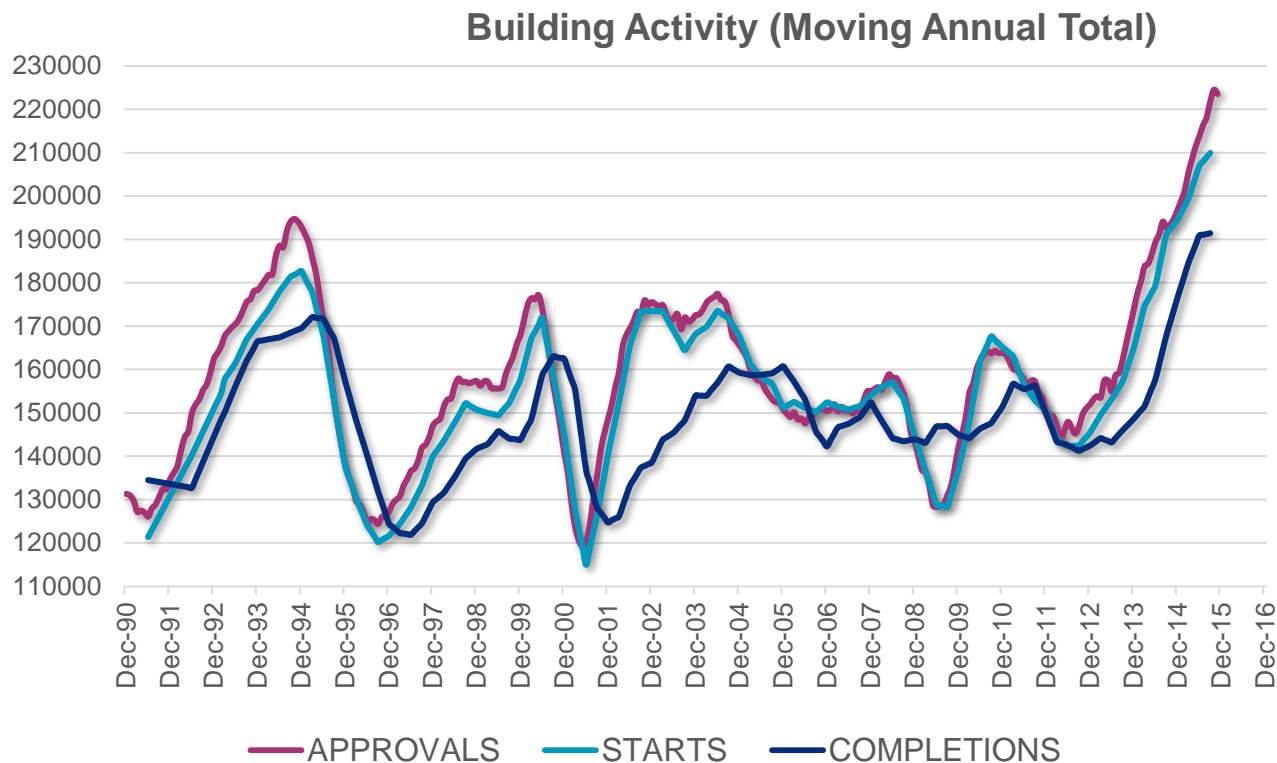


CORE WHITE SELL-IN
VALUE 2015 BILLION AUD ~2.5%



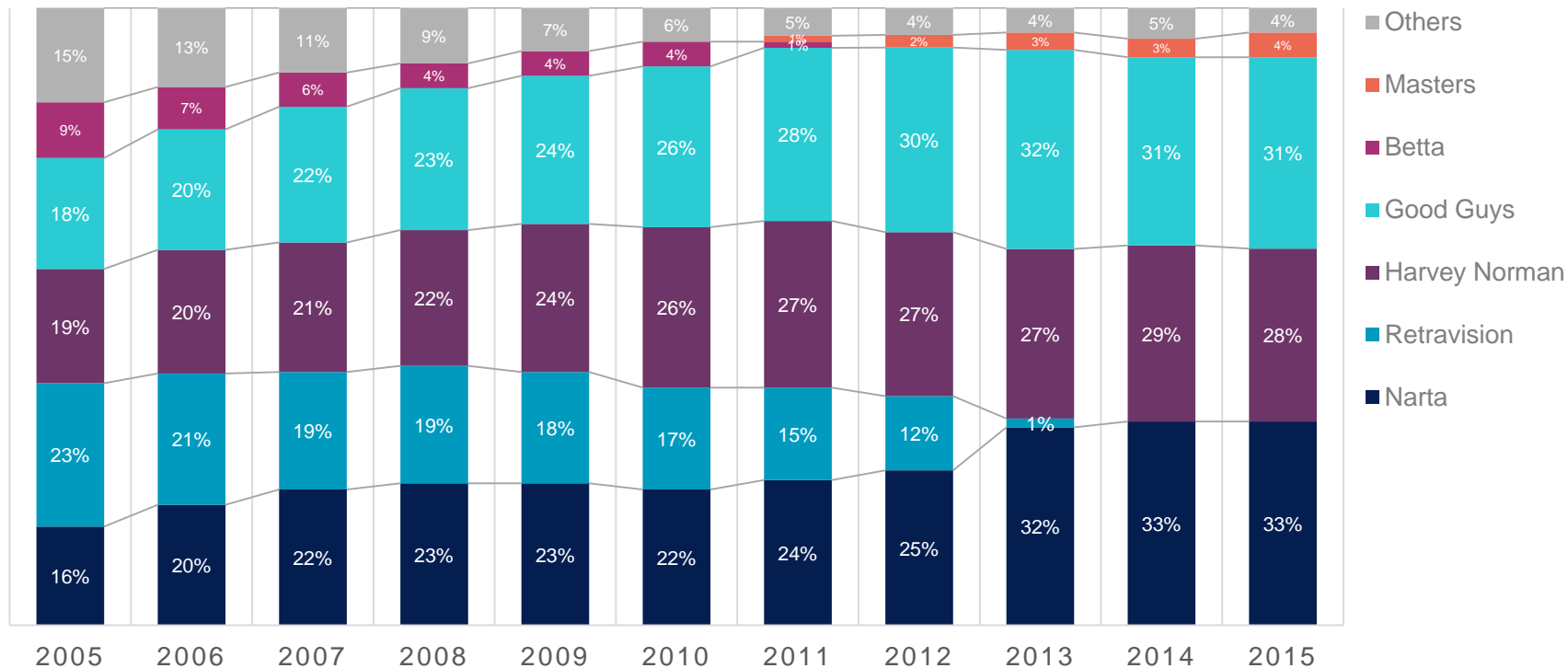
Australian Housing Market

Number of dwelling unit completions



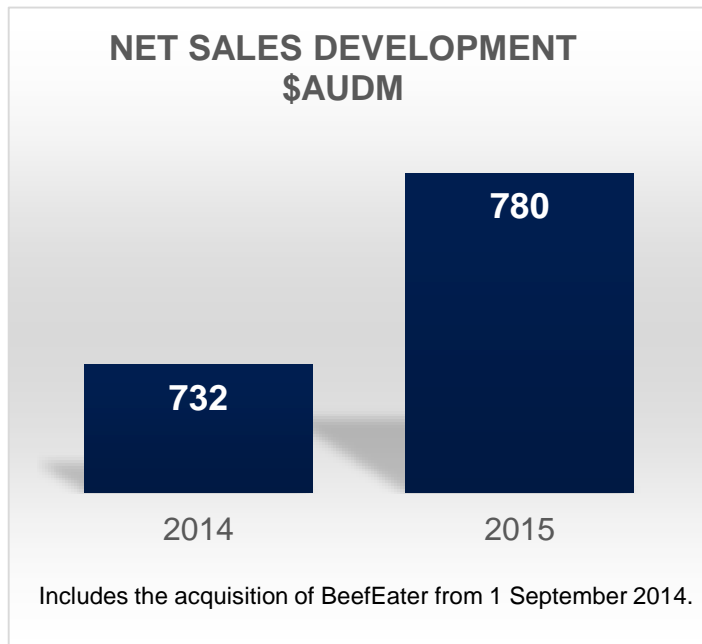
Retail Environment Australia

EMA's historical challenge was to maintain share and margin amid retailer consolidation



Profitable Sales Growth

Australia & New Zealand



>11% since 2010

- Maintain profit margins whilst adjusting to consolidation of retail landscape
- Maintain profit margins with the volatility of AUD



ANZ Market
and
Business

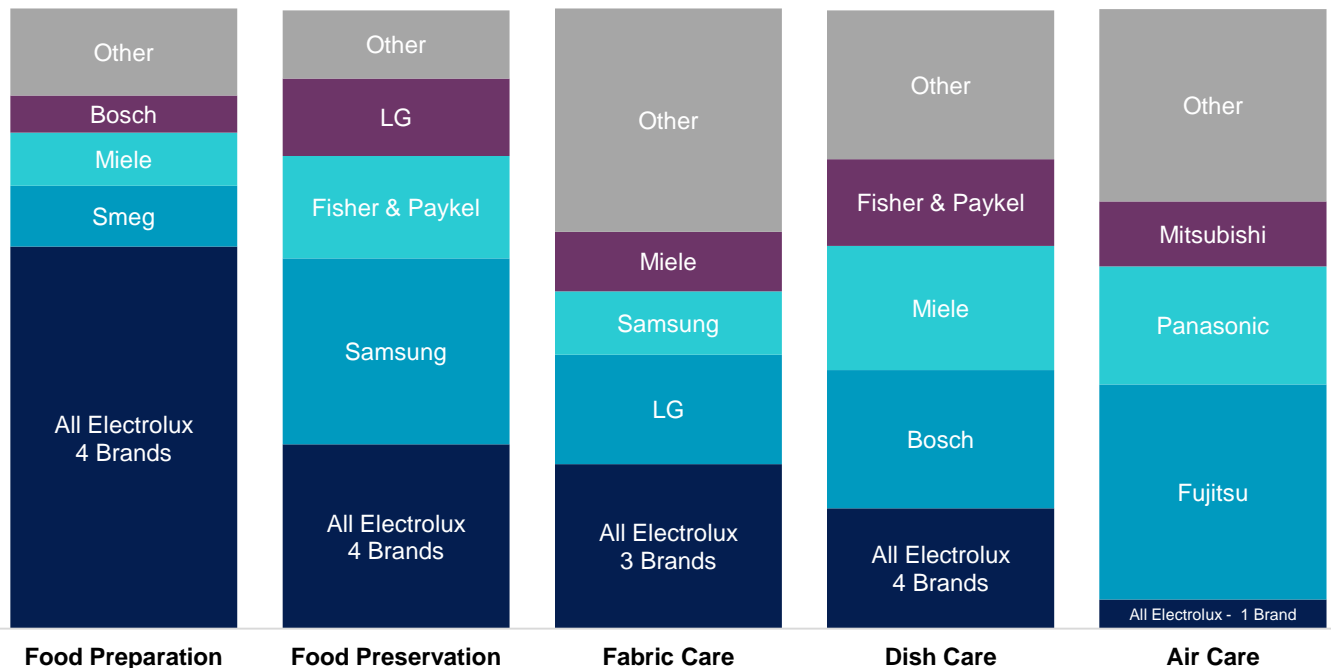
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Brand Volume Share by Category

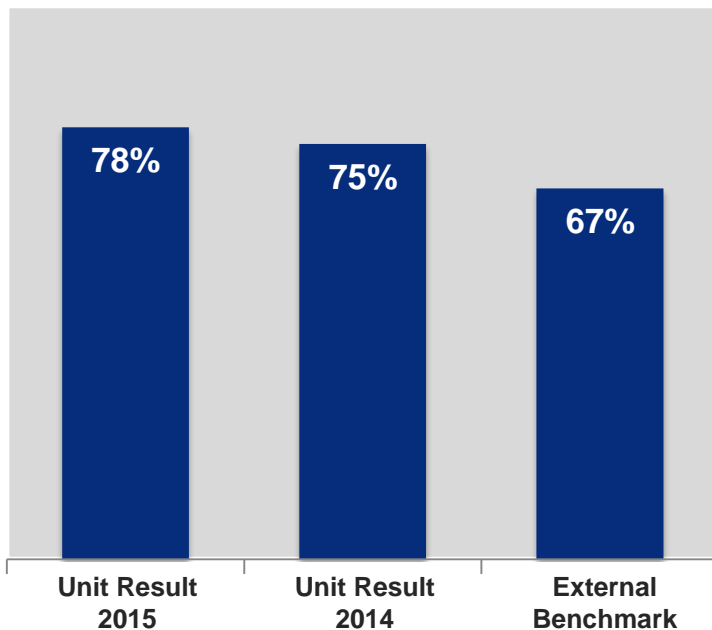
Australia



High Performance Organisation Scorecard

Australia

HIGH PERFORMANCE ORGANISATION INDEX



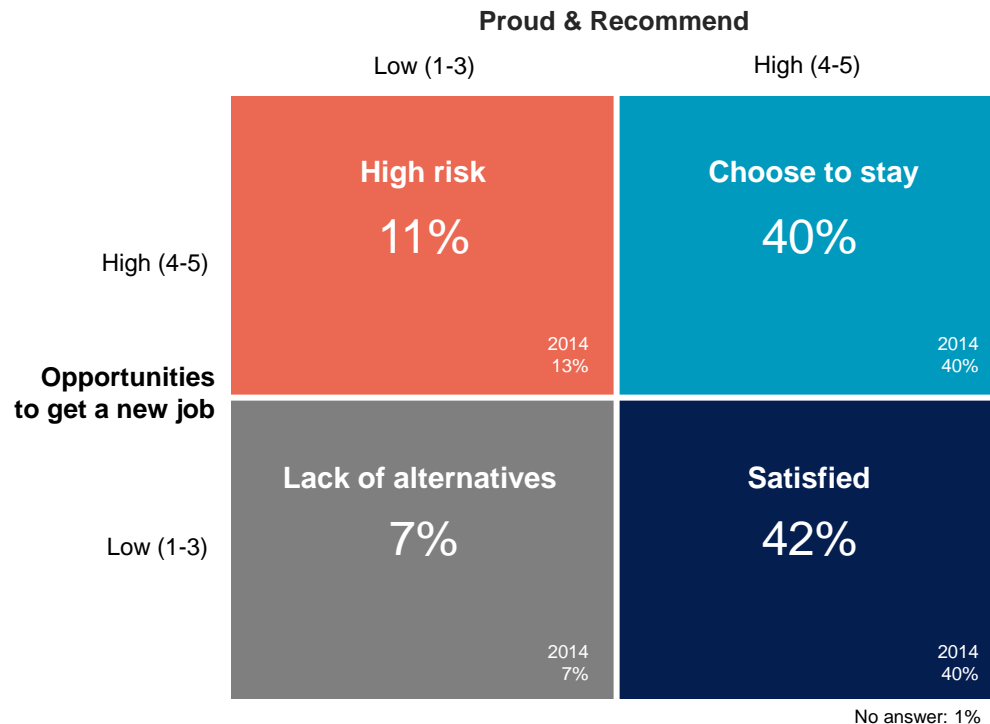
	Unit Result 2015	Unit Result 2014	External Benchmark
ENGAGEMENT PLUS	81%	78%	66%
ORGANIZATIONAL CAPABILITIES	72%	68%	67%
STRATEGY & PURPOSE	85%	81%	73%
* LEADERSHIP	85%	80%	

* Only non-production employees

People Retention

Australia

>80% staff have a positive intention to continue their career at Electrolux



Average Service Tenure 10.56 yrs**

** (EMA Non-Manufacturing ANZ)



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Brand Portfolio that meets diverse needs of Australian Consumers

Consumer Segment	Share	Food Preparation	Food Preservation	Dish Care	Fabric Care	Air Care	
Passionate Perfection	9%	AEG					
Cultivating Personal Community	11%	Electrolux					
Self Expression	15%						
Social Aspiration	18%						
Organised Sanctuary	12%	Westinghouse					
Practical Efficiency	9%						
Comfortable Living	26%	Beef 'n' Water	CHEF	Kelvinator	dishlex	SIMPSON	Kelvinator

Westinghouse 360 approach

Connecting at every touchpoint







Westinghouse

Ultimately the ads have had a very strong emotional and rational reaction from consumers – with strong appeal, persuasion and re-appraisal of the brand

RESPONSE

Steam 30" TVC

Pause 15" TVC

CAMPAIGN



Benchmark



Brand appeal

73

81

★ TOP 3%

59

85

★ TOP 3%

It contained new information about Westinghouse

77

87

★ TOP 10%

55

85

★ TOP 10%

It made you think differently about Westinghouse

56

66

40

71

It made you more likely to use Westinghouse

61

★ TOP 10%

68

★ TOP 10%

43

71

★ TOP 2%

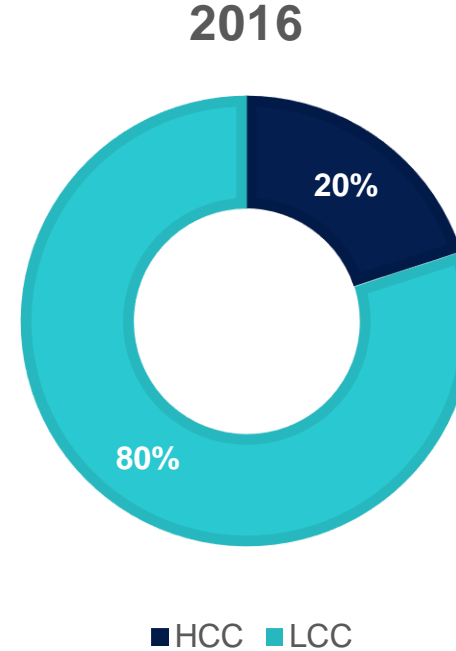
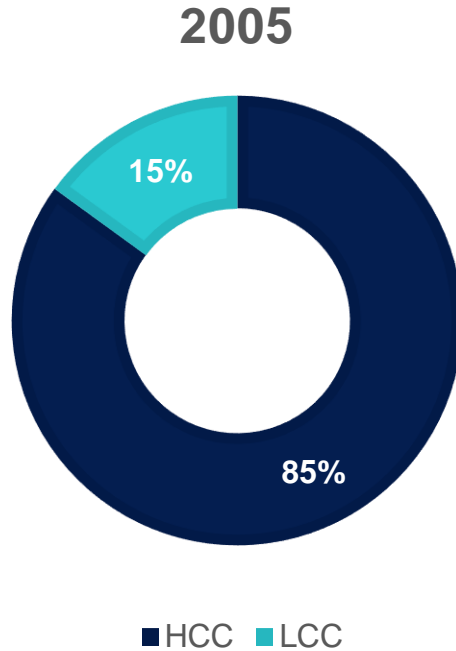


Taste Festival - Sydney



in partnership with  **Electrolux**

Transition of Manufacturing from High Cost to Low Cost Countries





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Invest Behind Brand, with Focus on Digital

1 Commercial Launch excellence

2 Digital Transformation

3 Winning In-store



Remarkable Consumer Experience

Best in Class Digital touchpoints

Onboarding

Maximize impact of physical contacts –
home delivery service calls

Webshops

Maintain Product Launch Momentum

Westinghouse

AEG

Electrolux



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