

EU household appliance market · Sample weekly digest

Executive Summary

- Premium appliance segment sees continued demand resilience despite consumer softness in mid-tier
- EU EPREL energy-label revisions effective 2026-10-01 will require re-labeling across most washing machine SKUs
- Chinese entrants (Midea, Haier) gain share in mid-tier via distribution partnerships; premium German brands hold in top-tier retail

Price Movements

- Premium washing machines (Miele, V-Zug, AEG): FLAT — stable list pricing YoY
- Mid-tier washing machines (Bosch, Siemens, BSH group): UP +3% — component + logistics cost pass-through
- Steel / white-goods raw materials: DOWN -2% — softer commodity inputs expected to ease Q4 pressure

Regulatory Updates

- EU EPREL energy-label revision (EU) — eff. 2026-10-01. Distributors should verify all SKUs have updated labels before Q4 orders.

Supply Signals

- Miele expands Polish production capacity for washing machines to serve EU demand — additional capacity phasing in through 2027

Demand Signals

- Premium hospitality projects across EU driving multi-year commercial-laundry tenders

Risks Flagged

- Consumer softness in mid-tier retail could pressure mid-market distributors' volume commitments through H1

QUELLEN (5)

[1] Miele & Cie. KG · Company profile

<https://www.northdata.com/Miele+%26+Cie.+KG,+G%C3%BCtersloh>

[2] Miele Group · Annual Press Conference 2024

<https://www.miele.com/en/com/press-releases.htm>

[3] German Company Registry · Miele & Cie. KG

<https://www.unternehmensregister.de>

[4] LinkedIn · Miele

<https://www.linkedin.com/company/miele/>

[5] TARIC EU · Household laundry machines (HS 8450)

https://ec.europa.eu/taxation_customs/dds2/taric/