EU household appliance market · Sample weekly digest

Week to 14 August 2026 · Laundry and large appliances

MARKET TONE

SUBDUED · Neutral 2026 demand outlook

Out-of-quota steel duty [1] **50%** From 25%, since 1 Jul 2026	Duty-free steel quota [1] **18.3 Mt/yr** About 47% vs 2024	Right to Repair deadline [2] **31 Jul 2026** Washing machines in Annex II
China share of EU large-appliance deliveries [12] **43%** 2025, APPLiA Poland	Online share of MDA sales value [15] **27%** Western Europe, H1 2025	

Summary

European appliance demand is flat and price-led. Electrolux described Q2 2026 demand as broadly stable with weak consumer sentiment and kept a neutral full-year outlook for Europe [7], and BSH expects no tailwinds in 2026 [8]. Two rule changes now shape costs: the Right to Repair Directive, whose transposition deadline passed on 31 July 2026 and which covers washing machines [2], and the EU steel regime under Regulation (EU) 2026/1384, which from 1 July 2026 cut duty-free steel quotas by about 47% and doubled the out-of-quota duty to 50% [1]. Chinese-owned groups keep gaining share: Hisense Europe added one percentage point in 2025 [11] and Haier grew European revenue by double digits [10]. No change to the EU washing machine energy label takes effect in 2026; the review of the label and ecodesign rules is still at the study stage [5].

Executive summary

- Demand: Europe broadly stable in Q2 2026 with weak sentiment; Electrolux keeps a neutral 2026 outlook for Europe [7].
- Regulation: Right to Repair obligations now apply to washing machines; Germany's implementing law passed the Bundestag on 25 June and the Bundesrat on 10 July 2026 [3] [4].
- Input costs: the new EU steel regime applies from 1 July 2026 with 50% out-of-quota duties and melt-and-pour origin evidence [1].
- Competition: Hisense Europe +6% revenue and +1 pp share in 2025 [11]; Haier Europe double-digit growth and Candy back in profit [10].

• Correction to earlier digests: there is no revised EU energy label for washing machines effective 1 October 2026; the review is still in the study phase [5] [6].

Price movements

No public index tracks European washing machine prices weekly, so this section reports the price direction stated by manufacturers and market researchers. The signal is consistent: list prices are not moving up, promotional intensity is high, and input-cost risk from steel is rising.

Item	Direction	Magnitude	Evidence
European appliance selling prices	Down	Not quantified	Pricing under pressure in Q2 2026 [7]
BSH European sales	Up	+1.2% FY 2025	Growth despite price pressure [8]
Steel import cost (EU)	Up risk	Out-of-quota duty 25% ’ 50%	Regulation (EU) 2026/1384 [1]
Western Europe tech and durables value	Flat	+1% 2025; MDA +1.5% projected 2026	NIQ outlook [15]
US duty on EU-made washers	Up (standing)	50% on steel content	Section 232 derivatives since 23 Jun 2025 [14]

Price direction signals, latest available

Regulatory updates

STATUS: ATTENTION

The Right to Repair Directive requires manufacturers of products listed in Annex II, including household washing machines and washer-dryers, to offer repair beyond the legal guarantee at a reasonable price, and extends the seller's liability by 12 months when the consumer chooses repair [2]. Germany adopts it through new manufacturer repair provisions in the Civil Code [3]. Distributors should expect suppliers to pass on spare-parts and repair-network costs.

The steel regime affects appliance makers through sheet-steel costs. Importers must provide mill certificates showing where the steel was melted and poured; the Commission is due to set the evidence rules by 31 August 2026 [1].

On energy labels, the Commission's review of the ecodesign rules (Regulation (EU) 2019/2023) and the energy label (Delegated Regulation (EU) 2019/2014) for washing machines runs under the Ecodesign for Sustainable Products Regulation, with the support study extendable to December 2026 [5]. Current labels remain valid [6].

Measure	Jurisdiction	Date	Effect for laundry appliances
Right to Repair Directive (EU) 2024/1799	EU	Transposition by 31 Jul 2026	Repair obligation for washing machines; +12 months liability on repair [2]
German implementing law	Germany	Bundestag 25 Jun; Bundesrat 10 Jul 2026	New manufacturer repair duty in the BGB [3] [4]
Steel regime, Regulation (EU) 2026/1384	EU	Applies from 1 Jul 2026	18.3 Mt quota; 50% out-of-quota duty; melt and pour [1]

Ecodesign and energy label review	EU	Study to Dec 2026 (optional)	No new label in 2026 [5] [6]
Section 232 steel derivatives	United States	Since 23 Jun 2025	50% duty on steel content of washers [14]

Regulatory items relevant to EU washing machine sourcing

Supply signals

- Miele is relocating assembly of almost all domestic washing machines from Gütersloh to Ksawerów, Poland, in stages through 2027, affecting about 700 jobs in Gütersloh [16].
- Miele completed its Performance Programme in 2025 with €500m in savings and about 23,000 employees (2.4%), avoiding redundancies in Germany [9].
- Poland produced about 26 million household appliances in 2025 (4%) and accounts for more than half of EU output of washing machines, dishwashers and dryers [12].
- China supplied 43% of large-appliance deliveries to EU countries in 2025, with shipments up 13% year on year [12].

Demand signals

- Electrolux: European demand broadly stable in Q2 2026, consumer sentiment weak, built-in kitchen demand low and replacement-driven [7].
- BSH: European sales grew 1.2% in 2025; management sees no market recovery and no tailwinds in 2026 [8].
- Miele: Professional business passed €1bn in turnover in 2025, while the domestic business developed unevenly [9].
- Channel: online accounted for 27% of major domestic appliance sales value in Western Europe in H1 2025 [15].

Competitive moves

Company	Development	Date	Source
Hisense Europe	Revenue about €4.8bn (+6%), +1 pp share, 10% share target for 2026	Dec 2025	[11]
Haier Smart Home	Europe revenue double-digit growth; Candy returned to profit	Mar 2026	[10]
Electrolux / AEG	Value and volume share gains in Europe; operating margin excl. items 3.8%	Jul 2026	[7]
APPLiA	Miele co-owner Reinhard Zinkann elected president, succeeding Hakan Bulgurlu	Jun 2026	[13]

Competitor and industry developments, latest disclosures

Risks flagged

• Steel cost pass-through: higher out-of-quota duties raise sheet-steel prices for EU assembly plants, while finished Chinese appliances do not face the same input duty [1] [12].

• Repair liability: Right to Repair obligations add spare-parts stocking and service cost that may show up in 2027 price lists [2] [3].

• Uneven transposition: national repair rules arrive on different timetables per member state, so obligations can differ by market for a period; Germany completed parliamentary passage in July 2026 [2] [3] [4].

• Mid-tier pressure: Haier and Hisense are growing faster than a flat market, which concentrates price pressure on mid-priced European brands [7] [10] [11].

• US export exposure: EU makers shipping washers to the US pay 50% on steel content under Section 232 [14].

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