NIKHIL CELLY

HAIER IN INDIA: BUILDING PRESENCE IN A MASS MARKET BEYOND CHINA

In a short 25 years, Haier Inc had emerged from being a small refrigerator factory in northeast China to becoming the world’s biggest appliance seller by retail volume. It had exported to developed markets in the 1990s, set up factories overseas and created a global retail chain that made it an unmatched success in China. This company that made its name by exporting refrigerators all over the world was now going full swing to take its internationalisation to the next level. It believed it was time to spread its footprint in the developing world—this time India.

Against the backdrop of a rapidly expanding Indian economy and a market already packed with multinationals, Haier was launched in India in 2004. T. K. Banerjee, an industry veteran appointed president of its Indian operations, hit the ground running with aggressive plans. He wanted Haier to become a top-three home appliance brand in India. To achieve this, he pushed for a localisation strategy comparable to those Haier adopted in other markets. He developed a local sales network, launched media campaigns, acquired a manufacturing facility and rolled out products he thought appealing to locals.

But year after year, Haier India’s performance was disappointing. Turnover expanded by a mere 7.7% over five years, with virtually zero growth in certain periods. It was clear that the investments were not paying off and the operations needed an overhaul. In 2009, the company appointed Eric Braganza as the new president. He spotted problem areas and almost immediately revamped operations, from conducting changes in human resources to putting out a new sales strategy. With the new direction, sales figures started to look better and the market responded positively. But the question remained for Braganza and the company: Was this the right path for Haier? Could the company sustain its growth thereafter?
Haier’s China Story

Unlike most Chinese companies that had achieved successes with rapid Chinese economic growth since the 1980s, Haier did not build its business on an original equipment manufacturer model. Instead, it created products under the values of a strong corporate culture, quality awareness, and a clear identity as an innovative manufacturer designing and producing for its clients.

In 1984, when 35-year-old Zhang Ruimin took over as head of the company’s near-bankrupt Qingdao facility in northern China, Haier was in distress. The factory was US$630,901 in debt, workers were not showing up on time, and Zhang came on board as the factory’s fourth manager that year. He needed to take control and discipline workers with regard to product quality. There were 76 malfunctioning refrigerators in the inventory, and he used them to his purpose. He gathered all the workers, asked them to each take a sledgehammer, and told them to destroy all 76 machines. He then said, “If I allow these refrigerators to be sold today, I’m allowing you to produce more of the same faulty refrigerators. Today it’s 76, tomorrow it can be 760, or even 7,600.”

Zhang’s uncompromising, almost hard-line position on product quality was a major force that drove Haier to higher grounds in subsequent years. By 1991, Haier achieved US$156 million in sales and was named one of the top 10 brands in China. With growing popularity and a need to expand production capacity, the company decided to drop its mono-product strategy of seven years and diversify into other home electronics. China’s economy was booming at the time. With rising disposable income and a steadily increasing demand for Haier’s products, Zhang decided, at a sizable risk, to invest in a US$282 million industrial park when the company had only US$15 million in cash. It was a bold move. Yet it was necessary to propel the company into becoming a household appliance giant. Beginning in 1992, Haier moved forward to expand its production capacity and product diversity via acquisitions. It bought financially distressed appliance makers, instilled in them Haier’s corporate principles on quality and market-mindedness, and unleashed their potential production capacity. It did so with 18 companies with various levels of success, spreading Haier’s presence to other home appliance categories and further establishing itself as a go-to brand for air conditioners, refrigerators and washing machines in China.

Haier Going Global

With stable growth on the domestic front, Haier ventured into global markets and launched an internationalisation strategy in the 1990s [see Exhibit 1]. Haier, now a leader on the home front, was trying to prove to the world that it was not another Chinese copycat manufacturer delivering low-grade products. European retailers were at first wary of Haier’s product quality and were reluctant to make orders. A turning point came in 1993 when Haier’s refrigerators

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came in first in a blind test based on rigorous German standards. The results surprised local retailers and they started to order more of its products, thus beginning Haier’s gradual rise in Europe as a reliable “made-in-China” brand.5 Its sales in Europe soon picked up, later spreading to Italy, the United Kingdom, France, Belgium, Luxembourg and other corners of the vast developed markets. From 1998 to 2001, Haier’s share in the European white goods market increased 15-fold.6 In 2002, Haier entered Eastern Europe and captured 10% of the Bulgarian market in its first year. That year, six of its refrigerator models were awarded “A-plus” grades in energy efficiency, further enhancing its image as a quality brand [see Exhibit 2].

In Asia, Haier opened its first overseas manufacturing facility in Indonesia in 1996, and within a year opened three other similar facilities in the Philippines, Malaysia and Yugoslavia. It forayed into the Japanese market in 2002.

In most of its overseas markets, Haier adopted a “Three-in-One” localisation strategy, meaning that Haier would position itself as a local brand, produce locally, carry out a local sales strategy and create products tailored to locals’ needs. In Indonesia, for example, Haier made all its products with energy-saving and flexible-voltage qualities to accommodate households that frequently experienced power shortages and unstable voltage supplies. This localisation helped Haier garner 28% of the Indonesian freezer market in just four years.7

**Entering India**

In the 1980s, India’s government was wary of foreign presences in the country and held tight protectionist protocols against foreign investments, particularly in nonessential sectors like consumer goods. Regulations forbade companies from having more than 40% foreign ownership. Import controls such as import licensing and high tariff rates also deterred foreign companies from manufacturing in India.8 LG, the Korean company that later became the dominant player in India’s home appliance market, failed twice in entering the market via joint ventures during this period. Then in 1991, after a balance of payment crisis that led to India being in debt with sizable loans from international agencies, the country entered a phase of liberalisation. The 1990s saw a series of policy changes that opened up the market to foreign investments. Some significant ones were allowing wholly owned foreign entities and treating them like local companies, and reducing import duties and trade barriers.

In China, the government had been pushing a “Go Global” policy since joining the World Trade Organization in 2001, which led to a decade-long period of overseas mergers and acquisitions by Chinese companies. It encouraged companies to invest abroad and sell and create a presence in overseas markets. State-owned corporations, often subsidised by policy banks’ loans, were considered vanguards of the movement. Haier, though not a state-owned entity, had been on board with the idea long beforehand. The positive sentiment at home only made investments easier for the company.

By the time Haier entered the Indian market in early 2004, the company had successfully gained ground in overseas markets. Haier had over the years become a multinational manufacturer and was actively promoting its global standing. Zhang, now its CEO, was eager

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5 For details, see Haier’s website: [http://www.haier.net/](http://www.haier.net/).
6 Ibid.
to thrust the company into adapting to the world market. He explained why it decided to enter the Indian market after all those years.

*When Chinese companies expand abroad, many of them choose to first enter developing countries and later more affluent markets. But Haier’s strategy is exactly the opposite. We first get into high-end markets in the US and Europe because we believe those markets are more mature and competition is more fierce. If we place ourselves in such situations, we can quickly spot our own problems.*

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Zhang Ruimin, CEO of Haier Inc

Crossing the southern border into the world’s second most populated economy seemed a logical step for Haier. India was experiencing rapid economic growth similar to the growth seen when Haier first achieved success in China. The country reported 8.3% gross domestic product growth in the 2003-2004 period, and was expected to log similar high growth rates in subsequent years. The market was favourable—with rising disposable income, an expanding middle class, and a relatively low entry barrier in the white goods market—which attracted Haier to become a mainstay in India.

Banerjee, who served in director positions at Indian consumer appliance manufacturers Godrej Appliances and IFB Appliances, assumed the role of Haier India’s president. He laid out specific targets for the company—to garner 20% of India’s white goods market in five years and to become one of the top three in the industry in seven years. Haier also planned to build an integrated manufacturing facility, a factory exclusively for making refrigerators (which would also be used as an R&D centre) and another for colour televisions.

Banerjee knew Haier had a market. Globally, the company was already a major player with proven technological strengths in consumer electronics. He thought as long as he understood the customers and drove the business in the right direction, there would be huge opportunities for new players in this expanding market.

### India: The White Goods Market

India’s white goods market was a growing piece of pie that seemed too good to miss. From 2000 to 2004, the home appliance sector was growing between 11% and 14% annually [see Exhibit 3], and growth was expected to expand to at least 20% between 2005 and 2010. Household income was rising, and the middle-class cohort was steadily expanding. There would be more double-income and nuclear families that could generate higher disposable incomes.

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11. Ibid.


income for electronics purchases. Low penetration in home electronics also made the market appealing [see Exhibit 4]. In 2005, the household penetration level of colour television, the biggest category among home electronics, was 21.3%, while that of refrigerators was even lower at 16.1%.

Rural India had an immense capacity for growth because many were still awaiting electrification. The urban market, on the other hand, was mainly a replacement and upgradation market, where users wanted more up-to-date products and demanded higher quality goods.

In anticipation of the high market demand, incumbents and new entrants scurried to ramp up production capacity [see Exhibit 5]. In 2004, the consumer durables industry had lined up investments of more than US$1.5 billion for the next five years. There were plans for new plants, new production lines, capacity expansions, and even Greenfield investments. The market was hyped up, yet market demand had yet to catch up. For example, India’s refrigerator industry had an installed capacity of 5 million refrigerators, but demand was still way below capacity at 3.3 million [see Exhibit 6].

The Indian market had its drawbacks. One persistent issue was a heavy tax burden. Not only were taxes high, but they were often levied at multiple levels, from taxes on imported raw materials to sales taxes. For example, picture tubes, a main component of colour televisions, would be charged a 20% customs duty when imported, and an excise duty of 16% would also be levied on the final product. The total tax incidence could stand at around 25% to 30%, compared to 7% to 17% in other Asian countries. Another problem was an inverted duty structure, whereby the imported parts of a product were taxed, but a finished product imported whole would be duty-free. This discouraged local manufacturing and assembling. All in all, the heavy taxes increased the costs of both imported and locally produced goods, resulted in higher prices, and impeded industry growth.

The high level of taxation in both imports and sales in the production process not only squeezed profit margins, but also resulted in a thriving grey market. The grey market for television sets was more than 50% in 2005. The lack of support for the sector also meant insufficient research and development, lack of quality inspection, and red tape that increased administration costs for manufacturers.

Besides, since 2005, the market had been plagued by an escalating price war that kept margins to a minimum. Companies resorted to a sell-by-volume approach to prevent losses. In 2005, the price of a 5-kg washing machine was down 25% from two years before, while the price of a 1.5-tonne air conditioner was slashed 40% from four years before. Mass market

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19 Ibid.
players LG and Samsung, while keeping prices low to maintain market share, were barely making a profit.  

Another major factor that influenced demand was government spending on infrastructure, particularly the rural electrification programme. While 65% of the Indian population still lived in villages, it was critical to have roads and bridges to take products all over India. The Indian government also tended to delay execution of rural electrification programmes, holding up potential market demand.

**Market Competition: The Korean Giants**

The Indian white goods market was dominated by Korean brands and local Indian brands. Korean producer LG was the evident market leader in almost every sector of the white goods market. By 2004, it had amassed 24% of the colour television market, 33% of the washing machine market, 26% of the refrigerator market and 35% of the air conditioner market.  

Coming in as close seconds were Samsung and Whirlpool, followed by Indian brands and Japanese brands [see Exhibit 7]. The Indian companies mostly competed in the low-price segment, and the Japanese companies competed on the premium end with more sophisticated products.

LG and Samsung entered the Indian market in the mid-1990s on two ends of the price spectrum. LG adopted low pricing strategies with basic-function products. For example, it launched Sampoorna, a colour television made for rural users, and priced it just above black-and-white televisions. In 2004, more than 65% of its revenue came from non-urban sources. After taking hold of the low-priced market, LG later seeped into the medium-end segment by offering feature-rich products and branding itself as an “aspirational brand.” Samsung, on the other hand, while initially launching premium products, later crossed into the mass market and released more price-sensitive products, aiming for leadership in both the premium and large-volume categories.

Both companies invested heavily in research and development. In 2008, Samsung spent US$13 million to set up a R&D centre with 75 staff in India. The following year, LG budgeted US$50 million for R&D and human resources. Around 18% of Samsung’s staff in India were in R&D.

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Gaining a Foothold with “Three-in-One” Localisation

Haier’s target is to become one of the prominent player in the Indian market in the coming few years, we wish to achieve this by following the localisation strategy, where R&D, manufacturing & marketing activities are carried out as per local way.

- Shi Zhiyuan, Managing Director, Haier Appliances India Pvt Ltd

Haier officially began operations in India in January 2004. Instead of making bold moves and executing rapid localisation, it took a step-by-step approach.

In the first couple of years, Haier outsourced production, sourcing low-end goods from local manufacturers and importing high-end goods. For example, the company directly imported handsets, split air conditioners and high-end models like plasma and flat screen TVs from its Chinese factories, and assembled colour televisions via local Indian manufacturers. Despite all the third-party manufacturing, Haier wanted to produce locally in India. Asset acquisitions had always been part of Haier’s growth strategy elsewhere, and Banerjee had been looking at factory sites since the beginning. He was just waiting for sales volume to grow large enough to justify local production costs.

Eventually, in August 2007, Haier acquired a 40-acre manufacturing facility at Ranjangoan in the Pune district of Maharashtra. The facility was formerly owned by Anchor Daewoo Industries Ltd, a failed venture between Korea’s Daewoo Electronics and India’s Anchor Group. It had an annual capacity of 400,000 units of refrigerators. Though Haier had yet to start producing washing machines and air conditioners at Pune, it was importing parts and assembling them on site.

Apart from supplying the Indian market, the factory also served as a sourcing hub to markets in Africa, the Middle East, and Southern and Western Asia. Haier could then cut delivery time and better serve its broader global network of clients. An order from the Middle East, which used to take 20 days from factories in China, would now take half the time from its Pune plant. Having a new factory in one of the government’s technology parks also allowed Haier to import capital goods, raw materials and components duty-free, and to receive tax exemptions on export profits or refunds on central sales tax.

For sales, Haier developed a network of direct dealers and distributors in India. The company was responsible for all the in-shop branding in retail outlets, including showrooms called

Haier Experience Centres. These showrooms typically spanned over 1,200 square feet in area and exclusively showcased Haier’s products. By 2009, Haier’s products were available at 4,000 retail outlets across India, as compared to the 18,000-outlet presence for LG and Samsung.\(^{38}\) In its first year, colour televisions contributed 60% to revenue and refrigerators contributed 35%.\(^{39}\)

Haier’s approach in India mirrored its initial steps in the United States. The company began exporting to the United States via scattered channels in 1990 and later appointed a single distributor in New York in 1994. That year, Haier concluded with sales of 165,000 refrigerators. Michael Jemal, head of the distributor chain, later became head of Haier’s US operations and expanded the company into a 120-staff team in five years.\(^{40}\) In 1999, when refrigerator sales reached 290,000 units, Haier kick-started its “Three-in-One” plan.\(^{41}\) It first built a manufacturing base in South Carolina. Three years later it acquired the former Greenwich Savings Bank building and turned it into its North America sales headquarters. Soon after, it opened a design centre in Los Angeles to realise true localisation. It rolled out its first “made in America” product in 2000, 10 years after its products were first sold in the country. Haier replicated the localisation model in Europe. It acquired a manufacturing unit and established a sales headquarters in Italy, and opened two design centres in France and Amsterdam.

**Branding Its Way into India**

Haier adopted a global branding strategy in 2004 to raise its profile on the world stage. Zhang wanted to shift the company’s export-based mindset to one that focused on creating a name brand in the host market.\(^{42}\) As a result, the company made its entrance in India a shout out to its global brand value and presence in other parts of the world. Banerjee made it a priority to build a brand name for Haier in India.\(^{43}\) He believed its Chinese identity, framed in this context, would become less of a weakness and more of a strength.

> Our brand message is “Inspired Living”. We also did a very simple brand communication—that Haier is a global player. We are not ashamed of the fact that we are born in China. In fact, our strength lies in the fact that we have conquered the world.

-T. K. Banerjee, President of Haier Appliances India Pvt Ltd\(^{44}\)

“Made in China” labels often came with connotations of poor value, low quality and being cheap.\(^{45}\) Haier, recognising this liability, undertook a strategy of acquiring household brands

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in overseas markets to leave its “Chinese-ness” behind, such as an attempt to buy US appliance maker Maytag Corp in 2005. Haier’s often-localised production also made it more akin to being a local brand. The branding exercise gradually paid off, and global consumers were buying more from Haier. From 2009 to 2011, Haier ranked first in worldwide major appliance brands by retail volume.46

With the stronger global recognition of its parent company, Haier India came out less tarnished than other Chinese companies operating in the country. In fact, five months after its launch in India, Haier conducted a brand perception survey that showed that 97% of its customers did not believe Haier was a Chinese brand, and some believed it was from Germany or the United States.47 Banerjee thought Haier’s tactical brand communication was a major reason behind the recognition. Haier projected itself as a global brand delivering the latest technology and marketed its products as premium.48 In 2011, Haier became the 19th most trusted brand in India, and fourth in the electronics sector, placing behind foreign giants such as Sony, LG and Samsung, but ahead of local counterparts including Onida, Videocon and Godrej.49

**Market Position and Product Offerings**

_The biggest concern for the Chinese and Haier has been to manage the speed of growth. If we had gone for a price war, we could have easily doubled the size of our business...We don’t want to grow too fast.... It is a matter of time—we will hit the mass market by 2006, when we have enough brand acceptance.”_

- T. K. Banerjee, President of Haier Appliances India Pvt Ltd50

Given its upscale brand image, Haier naturally opted for a premium price strategy in India. It targeted the higher income bracket and charged products at a 5% premium. While price wars were prevalent among major players, Haier stayed out of them. In China, Haier had been known to keep price wars at bay and win customers through innovation and product design, a belief heralded by its CEO, Zhang, who said that the company would fight in a “value war” but not a “price war”.51

Banerjee planned to launch an India-centric product line-up for Indian consumers. Its major product categories would still be refrigerators, air conditioners, washing machines, heaters and colour televisions. Haier introduced unique models into this market, such as bottom-mount refrigerators, a product that later became one of the most popular models in the segment. It also brought in its patented double-driving washing machines, expecting them to be welcomed by energy-strapped Indian consumers for their ability to save water and electricity. Other innovative products included detergent-free washing machines, which were launched in China, and niche products like wine cellars and mini bars that were sold at higher

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prices. It even came up with a line of water heaters with the patented SafeCare Technology that protected users from electric shocks. “The perfect bath now totally shock-proof” was the product’s promotion slogan.52

In 2008, Haier launched commercial-use refrigerators, air conditioners and water heaters. It also introduced a range of cooling products with high-performance technology that could save power by up to 51%.53 In 2010, about 48% of Haier India’s revenue came from refrigerators and washing machines.54

In China, innovative product designs had been a core pursuit of Haier’s engineers. When CEO Zhang learned that rural users rinsed sweet potatoes with washing machines and clogged the draining tubes with dirt, he ordered engineers to design machines that allowed for both washing potatoes and clothes without undermining functionality. He also came up with small-load 1.5-litre refrigerators, one of the first in the world, when he learned that people were more conscious of saving water and energy in the summer months. The same concept of creating products tailored for end-users was reflected in Haier’s products across markets. For the US market, it entered with two niche offerings—wine cellars and compact refrigerators. Haier researched American consumption behaviours and concluded from the growing trend of wine consumption that there would be high demand for wine cellars. It then designed a range of cellars specifically for Americans and eventually took over 60% of the market.55 Haier carried out similar consumer-oriented research before launching compact refrigerators designed for college dormitories.

Challenges and Makeover

In 2009, six years into its India business endeavours, Haier was reporting sluggish revenue growth. Turnover had remained near stagnant from 2005 to 2009 [see Exhibit 8 and Exhibit 9]. Haier then owned a mere 3.5% of India’s consumer durables market,6 a far cry from the 15% it had envisioned.7 Year after year, it had set revenue targets it failed to achieve. Its goal of becoming one of the top three white goods brands was becoming a distant vision. Its Indian operations were only contributing 2% to global revenues as of 2008, as compared to the 10% it aimed for.58 Haier was also developing a poor reputation for after-sales care.59 To put it lightly, Haier India had fallen flat of expectations.

Faced with disappointing sales, Haier attempted to break into the mass market segment in 2007 with direct cool refrigerators and other mass volume categories. In 2008, it rolled out 16

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52 For details, see Haier’s India website: http://www.haier.com/in.
new air conditioner models and nine refrigerator models, plus new washing machines and LCD television sets. It even considered acquiring other brands.

In September 2009, Haier India replaced Banerjee with Eric Braganza as president of its India operations. Prior to joining Haier, Braganza served in senior positions at Electrolux and Videocon Industries.

A Second Chance

Braganza immediately identified marketing and sales as the weak link. He overhauled Haier’s branch and sales structure, and restructured its manpower so that 30% of its employees were new. On the sales front, he planned to add 100 direct dealers and 1,000 indirect dealers to Haier’s distribution network. He wanted the company to focus on dealer retention. He began treating dealers as Haier’s first customers and offered them good products and competitive margins, together with single dealings in select locations to encourage brand loyalty. Haier offered them a gross margin of 10% to 15%, above the 10% to 12% industry average.

He also planned to open more Experience Centres and add up to 700 retail outlets to Haier’s existing 4,500 across the nation. Braganza aimed to raise the revenue contribution from Experience Centres from 5% to 12%. The company would spend up to US$2.7 million on in-store promotions. He also took measures to strengthen after-sales support, which was previously heavily reliant on dealers. He was set to take over the service and planned to solve every customer issue within six hours in all metro cities. He also planned to open after-sales service stations, called InstaCare, first in eight cities and later across all state capitals. The first two were launched in Delhi and Mumbai.

Braganza also repositioned Haier’s pricing strategy closer to the masses. He did not want to sacrifice the upscale image Haier had spent years building up, and decided to align its products to the middle market, making them still above the price-fighter brands, at about 3% higher than Samsung and LG on some products, yet lower on others.

Since Braganza had taken office, Haier had launched 25 new products, including LED TVs, deep freezers, dishwashers, and small kitchen appliances such as juicers and blenders. The company also laid down plans to launch laptops and cameras in the near future. In 2010,
Haier invested US$22.2 million\textsuperscript{70} to upgrade its factory’s capacity and added new lines to produce air conditioners and washing machines. In 2011, it invested another US$9.5 million\textsuperscript{71} with the aim to double refrigerator production and triple washing machine production by 2013. In 2010, Braganza launched an aggressive marketing and branding campaign. This included a “You Inspire Us” media campaign that emphasised that Haier’s products had always been inspired by Indian consumers. He also brought in Bollywood actor John Abraham as Haier’s brand ambassador. Braganza further exposed Haier to the masses by spending US$6.6 million in above-the-line marketing, 60% of which was in television advertisements.\textsuperscript{72}

**Going Forward**

Seven years into the market, Haier was going strong for the first time [see Exhibit 10]. Braganza’s fixes for Haier India seemed to work. In the first quarter of 2010, the company reported a 200% increase in turnover.\textsuperscript{73} Sales in 2010 expanded 136% to US$182.8 million.\textsuperscript{74} Haier’s market share in consumer durables rose to 7%.\textsuperscript{75} Refrigerators and washing machines now each contributed a third to Haier’s sales in India, with LCDs, air conditioners, dishwashers and microwave ovens among others accounting for the rest.\textsuperscript{76}

Braganza was looking at expanding. In the initial years of Haier India’s existence, the thrust was to position its presence in India, and now the plans were on course and the company should be looking further into the future, he thought. The changing market landscape was a promising opportunity, but could turn into a disaster if Haier failed to catch the wave. Braganza wondered what the best ways to keep the company growing were. It would take time to tell whether the current pricing strategy would be effective, and Haier still needed to work on the range and diversity of its products. Braganza had to evaluate current strategies and map out a sustainable plan for Haier.


EXHIBIT 1: HAIER’S CORPORATE STRATEGIES

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Source: Company’s website.

EXHIBIT 2: HAIER’S GLOBALISATION: A BRIEF OVERVIEW


EXHIBIT 4: OWNERSHIP OF CONSUMER DURABLES IN 2012 (PERCENTAGES OF HOUSEHOLDS)

EXHIBIT 5: PRODUCTION VOLUMES OF MAJOR HOME APPLIANCES IN INDIA

EXHIBIT 6: SALES VOLUME OF TVS & REFRIGERATORS IN INDIA (2005-2009)

Source: Corporate Catalyst India (2009) “Consumer Durable Industry in India”,

EXHIBIT 7: MARKET SHARE OF WASHING MACHINES & TELEVISIONS IN INDIA (2006-2007)

Source: Corporate Catalyst India (2009) “Consumer Durable Industry in India”,
EXHIBIT 8: REVENUES FROM REFRIGERATORS AMONG TOP PLAYERS (2009)

EXHIBIT 9: HAIER INDIA’S ANNUAL TURNOVER (2005-2010)

EXHIBIT 10: TIMELINE OF HAIER IN INDIA