
WHIRLPOOL CORPORATION

LARGE RESIDENTIAL WASHERS FROM CHINA

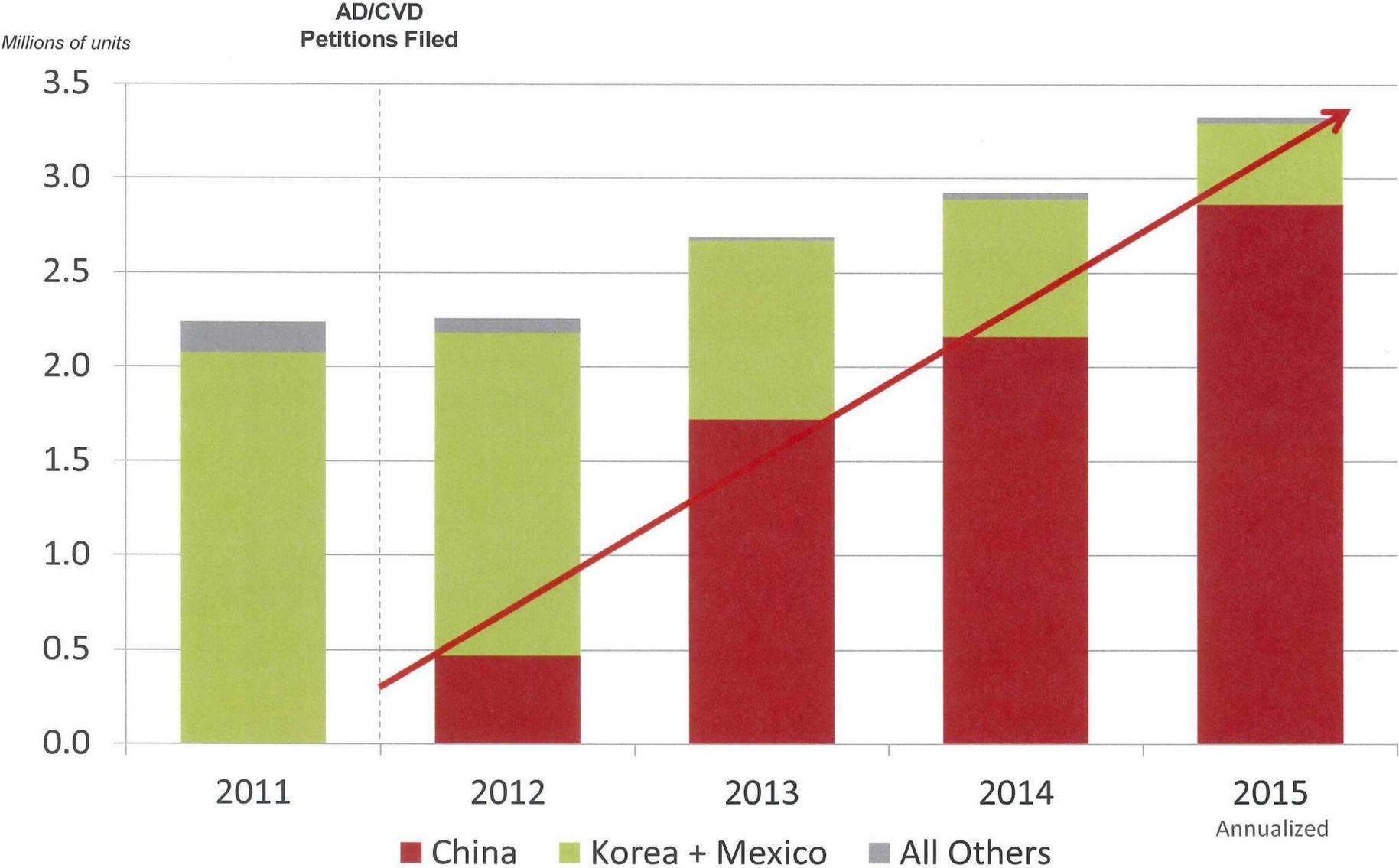
Petitioner's Staff Conference Exhibits

Inv. No. 731-TA-1306 (Preliminary)

January 6, 2016



U.S. WASHER IMPORTS FROM CHINA UP > 357%



Source: Official U.S. Census Data, General Imports HTSUS 8450.20.0090, 8450.20.0040, 8450.20.0080

ITC FINDINGS FROM PREVIOUS LRW INVESTIGATION

Competition Occurs at the Wholesale Level

- “we have focused our analysis of competition and pricing in the U.S. washer market on sales by domestic producers and importers to retailer/distributors”

ITC Final Determination at 18-19.

Domestic and Imported LRWs Are “Comparable” and “Substitutable”

- “there is a moderately high degree of substitutability between subject imports and domestically produced LRWs” *Id.* at 23.
- “Although non-price factors are also important, the record indicates that subject imports and domestically produced LRWs are comparable with respect to such factors.” *Id.* at 24.

Price is a Key Factor in Retailer Purchasing Decisions

- “Price is an important factor in the LRW market.” *Id.* at 23.
- “Responding purchasers ranked price more than any other factor as among the top three factors that influence their purchasing decisions.” *Id.*

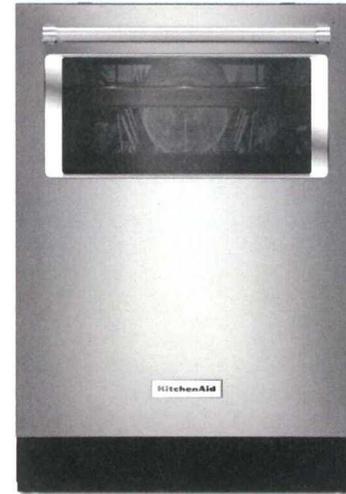
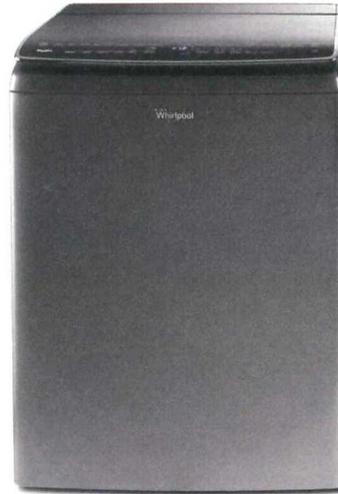
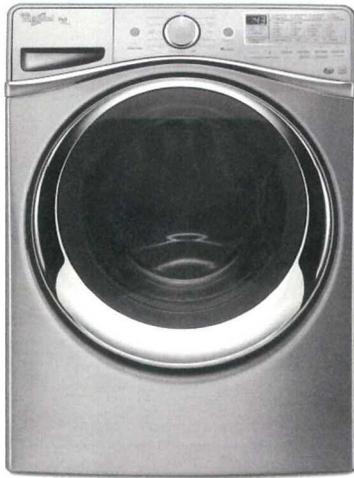
ITC FINDINGS FROM PREVIOUS LRW INVESTIGATION (CONT.)

Question from ITC Purchaser Questionnaire	% Responding "YES"
Does your firm vary its purchases based on price?	90%
Does your firm factor expected profits into its floor space allocation decisions?	70%
Does the availability of a highly featured washer at a low price affect the sales of less highly featured washers?	100%
Is the price you are willing to pay for offerings from one supplier influenced by the prices/features offered by competing suppliers?	79%

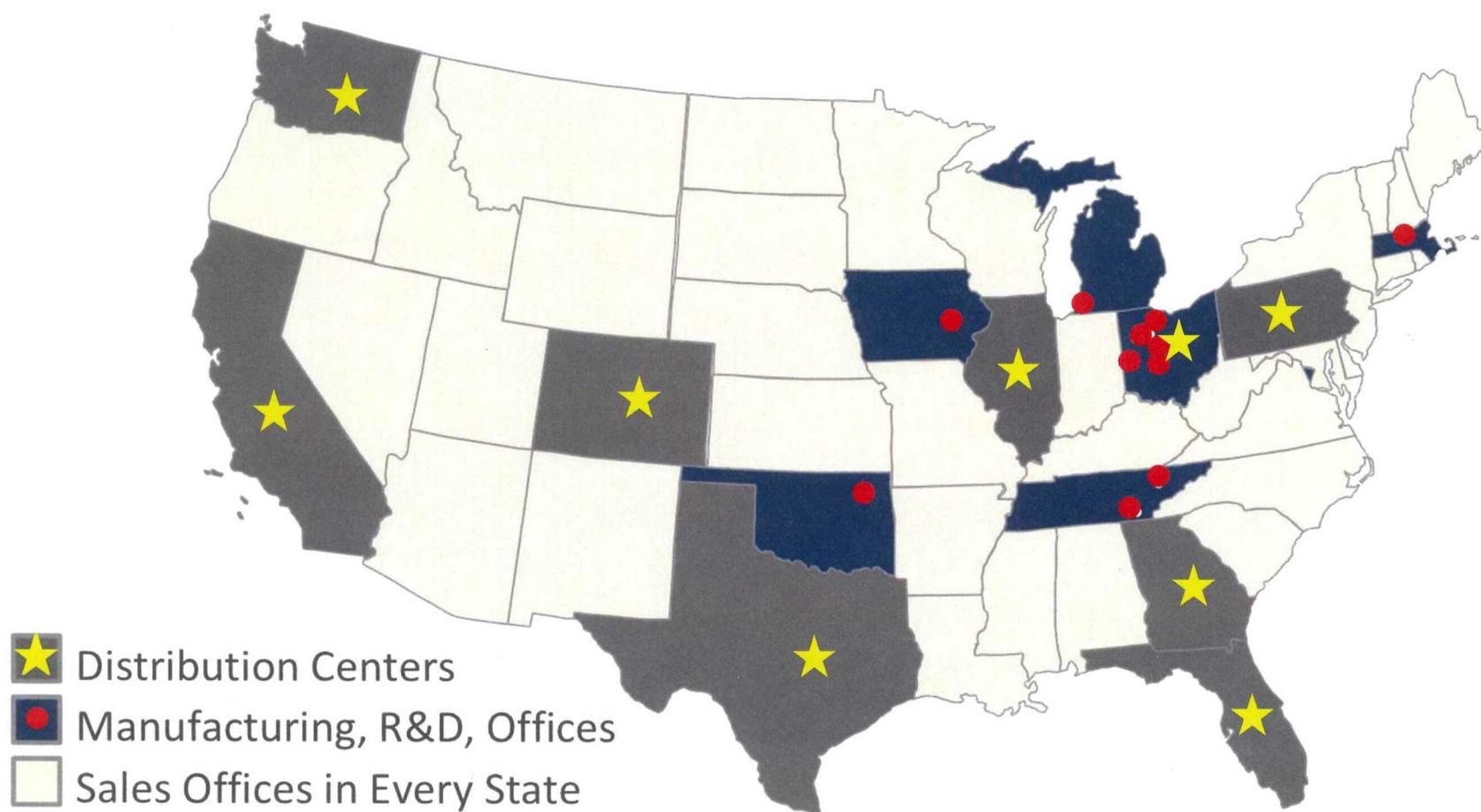
Source: Final Staff Report at II-27, V-4, V-12, and V-13.

LEADING PORTFOLIO OF APPLIANCES

EXHIBIT D



WHIRLPOOL OPERATIONS IN AMERICA

**Over 104 years Invested in America**

22,000+ U.S. employees, including 15,000 manufacturing jobs

Nine U.S. manufacturing facilities, 106 distribution centers

\$1.4+ billion invested in U.S. facilities since 2010

PLANT INFORMATION



INTERESTING FACTS

- World's largest washing machine plant (2.4 Million square feet)
- 3,000 employees (half with 20+ years of seniority)
- Makes a washer every 4 seconds
- 30 miles of overhead conveyor inside
- 400 trucks cross the property each day

DAILY RAW MATERIAL USAGE

Pounds of steel	2,000,000
Pounds of plastic resin	200,000

OVERALL STATISTICS

Number of unique parts	6,000
Number of parts used each day	7,000,000

Statistics are rounded to protect BPI



IMPORTANCE OF CLYDE TO BROADER U.S. ECONOMY

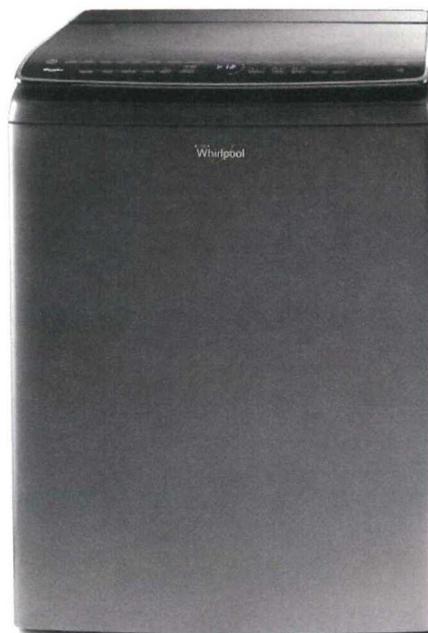


Thousands of Upstream and Downstream Jobs Supported Across the U.S.

SAMPLING OF WHIRLPOOL INNOVATIONS DURING POI



Elegant Knob Control



**Largest TL Capacity (6.2 cf)
Front control touch interface
Load & Go™ for TL**

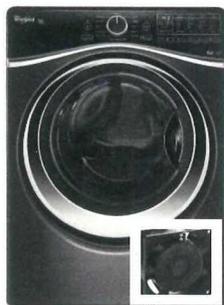


**Intuitive touch interface
“What to Wash, How to Wash”**



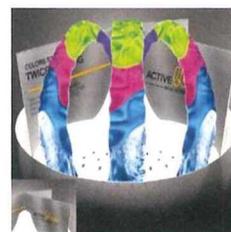
**Load & Go™
for FL**

**Remote Connectivity
with NEST**



**Dynamic Venting
Technology™**

ColorLast™ Cycle

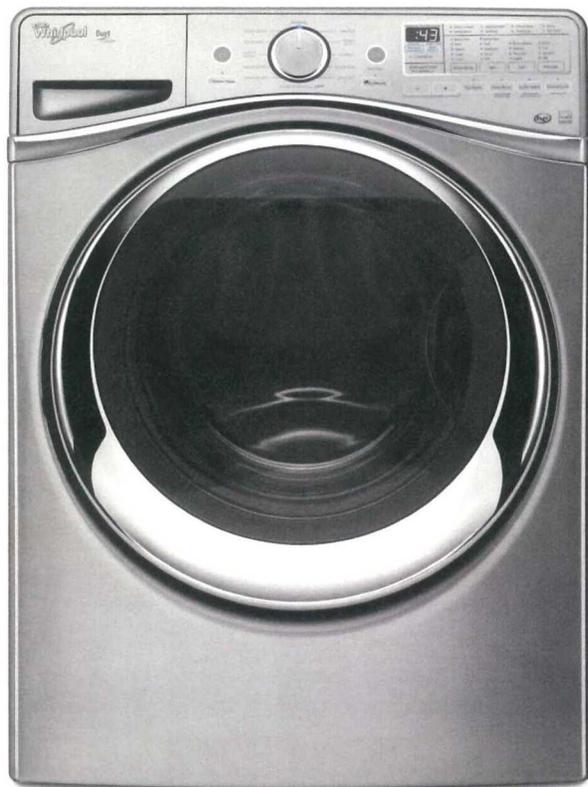


**Active Bloom™
Wash Action**



**Active Spray
Technology**

KEY LRW FEATURES



Front Load vs. Top Load

Capacity

Heater

Steam

Color

Impeller

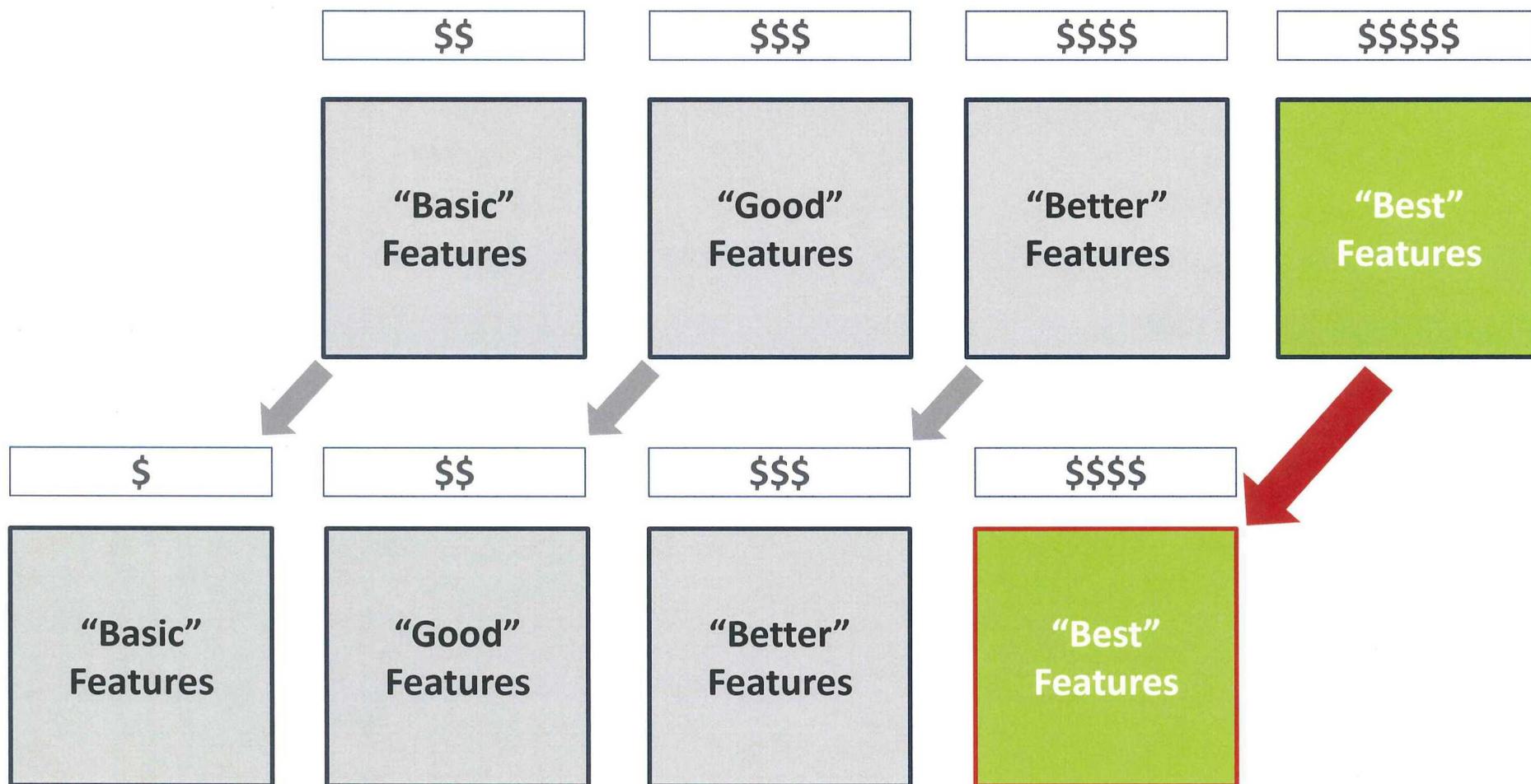
Direct Drive

TL Lid (Clear or Opaque)

Energy Star

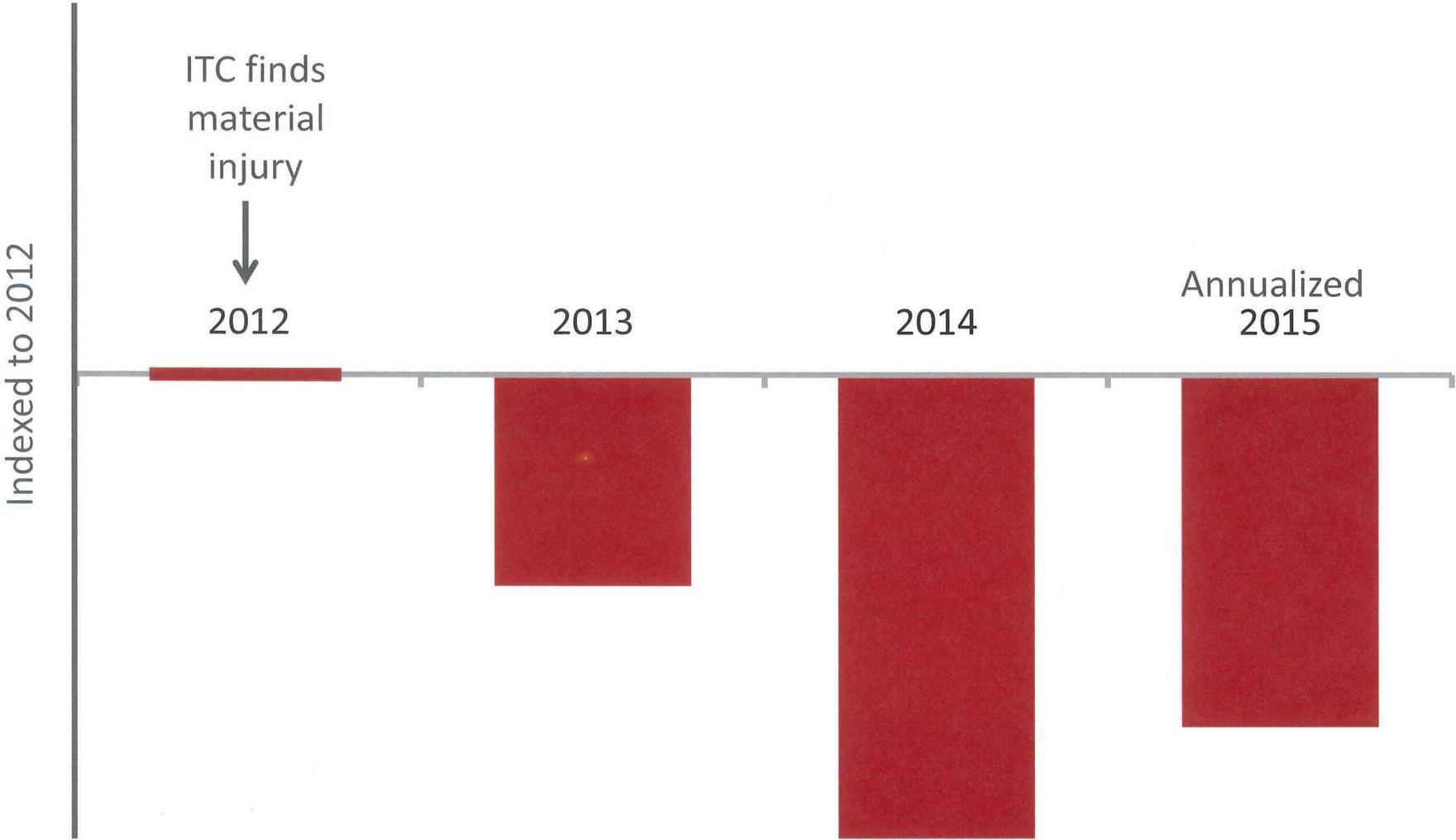


WHOLESALE PRICE COMPRESSION



Price reduction for premium models compresses prices down the entire model lineup

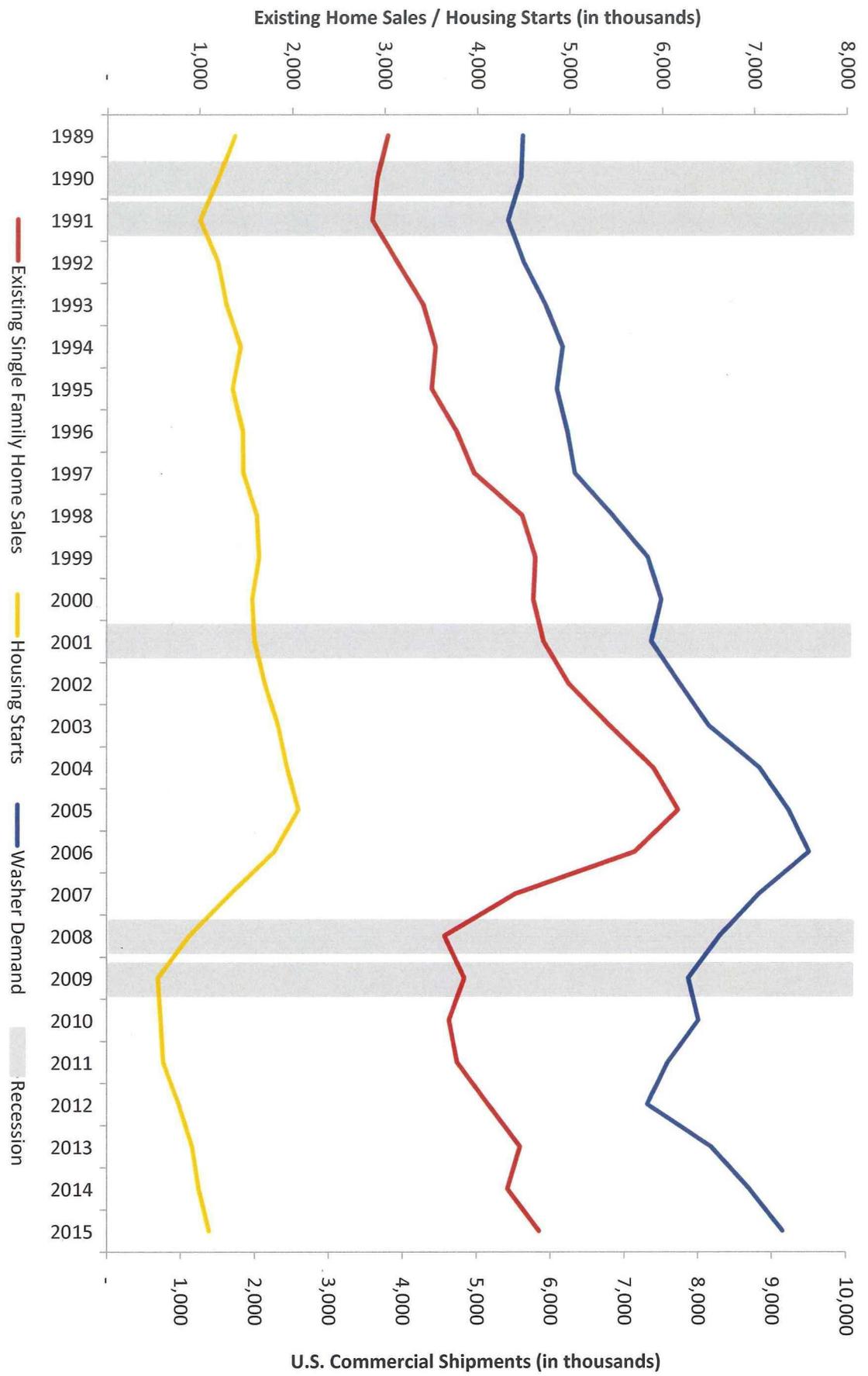
WHIRLPOOL OPERATING LOSSES FOR LRWS



Whirlpool profitability continues to erode as subject import volumes increase

WASHER DEMAND VS. HOUSING SECTOR ACTIVITY

EXHIBIT L



Sources: AHAM, IHS Global Insight, WHR Intelligence