

B/S/H/

BSH Home Appliances Group

New Generation of Thermador Built-In Cooling

—

Bernardo & Courtney



RNA Luxury Refrigeration by Type

Major Categories Only



Bottom Freezers

Refrigerator on the top, freezer on the bottom. Consists of a mix of traditional bottom freezers (replacement) and true flush (new construction) product. Sizes range primarily from 30" - 42" width.



Side by Side

Freezer on the left, refrigerator on the right, Exclusively replacement traditional (replacement) product. Sizes range primarily from 42" - 48" width.



Columns

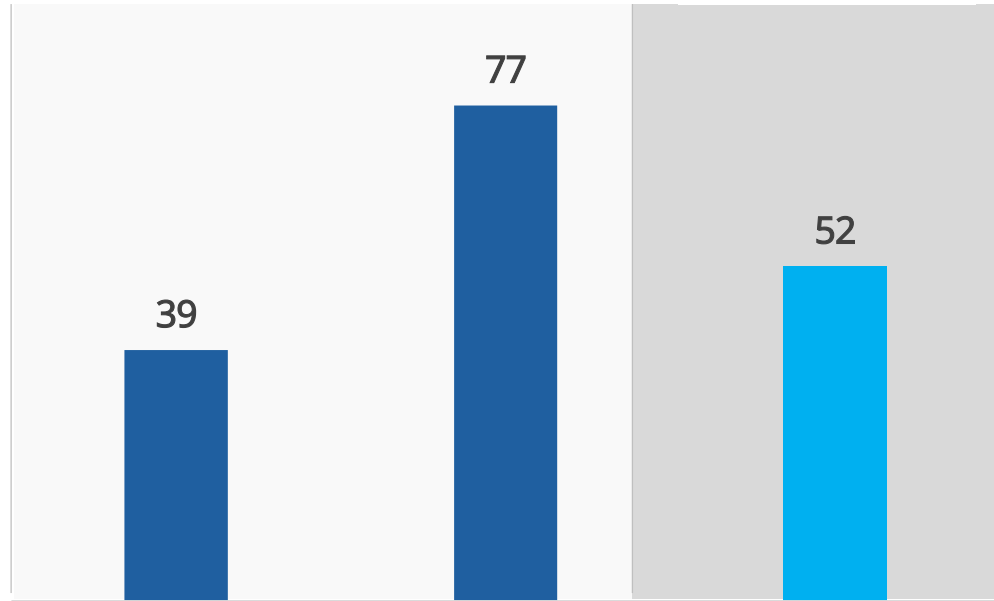
All freezer or refrigerator, single door units. Only new construction available in sizes from 18" - 36".

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Luxury Market Access BI SBS 1.0

AHAM Market Research Estimate for 2024

← BI 1.0 ACCESS: 69% → ← 31% MISSING →



169K
US TOTAL UNITS

\$816M

69%
Limited Access

Columns & Bottom Mounts
New Construction

Door Type	Column	Bottom Mount	Side-by-Side
Width	18", 24", 30", 36"	30", 36", 42"	42", 48"
Market Access	New Construction	New Constr. & Replacement	Replacement
BSH Play	YES	LIMITED	NONE

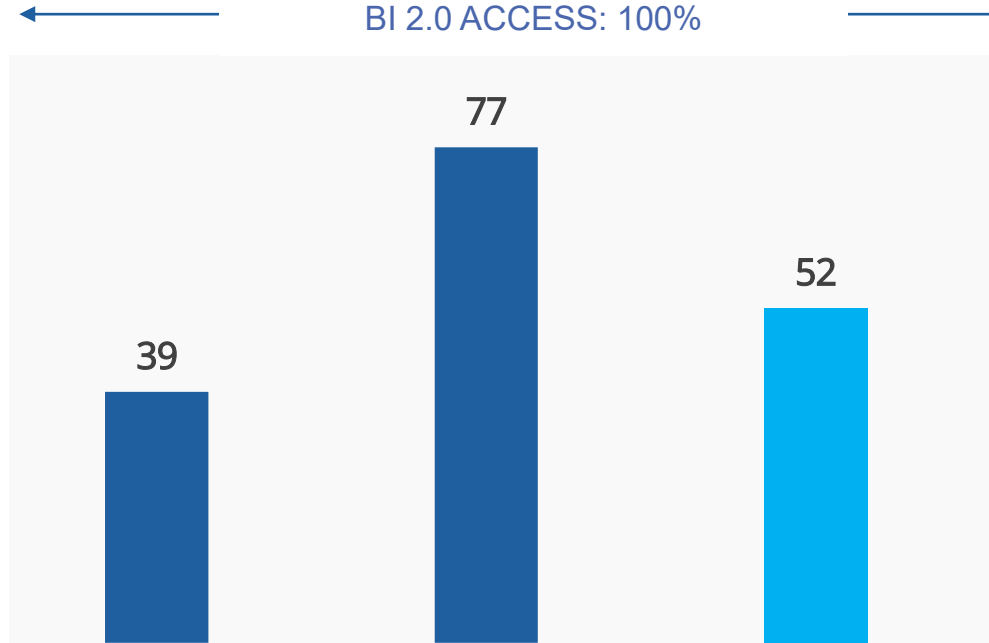
Source: Market Research MDA July 2019. Estimate is total RNA, Columns exclude freezers and wine.

B/S/H/

Luxury Market Access BI SBS 2.0

AHAM Market Research Estimate for 2024

BI 2.0 ACCESS: 100%



169K
US TOTAL UNITS

\$816M

100%
Full Access

Column & 30", 36", 42", 48"
New Construction & Replacement

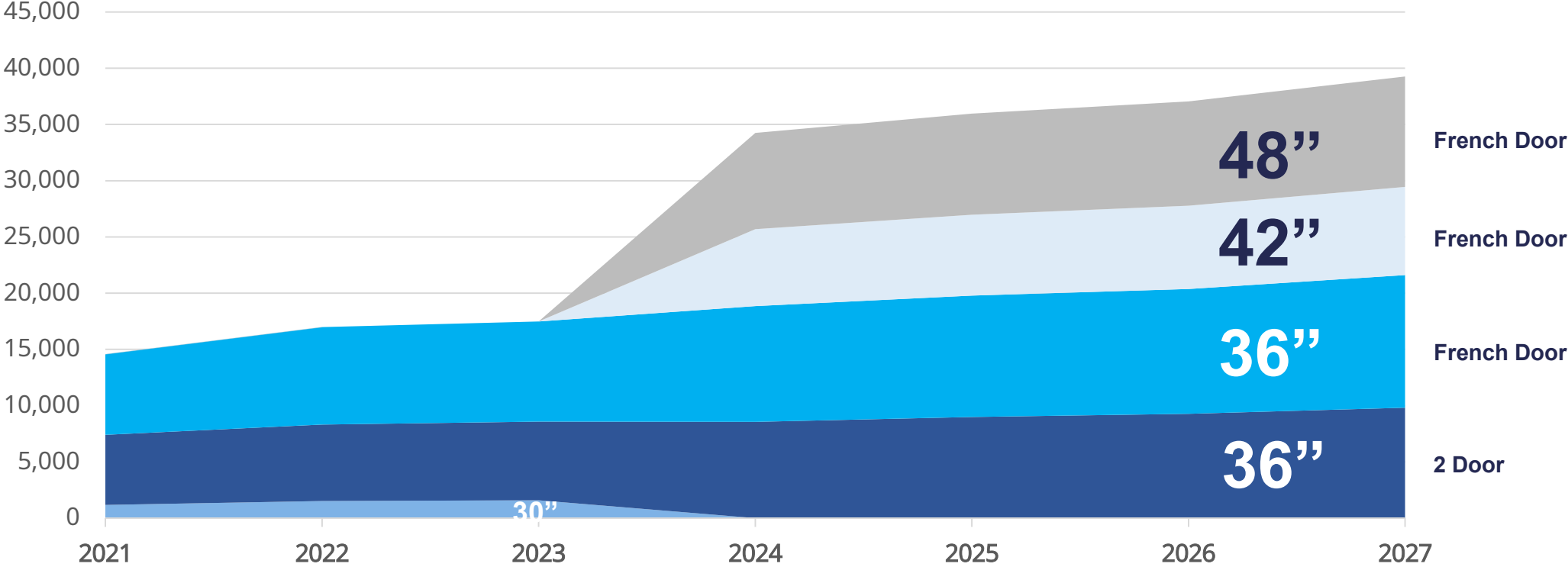
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B/S/H/

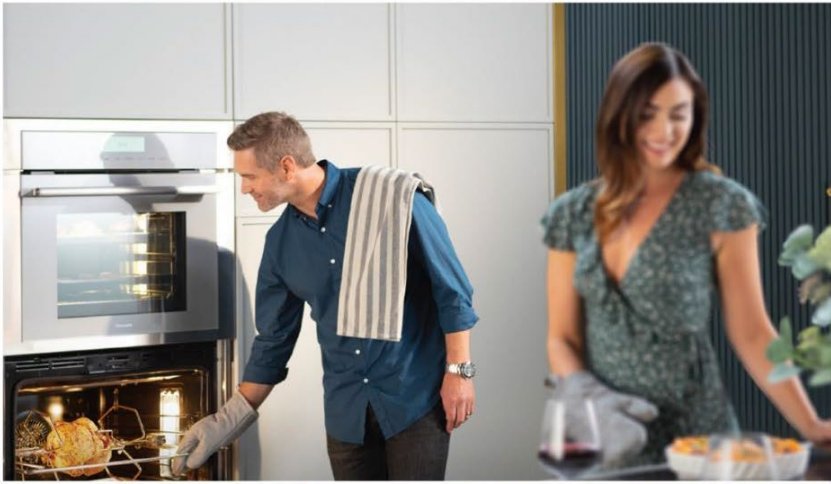
Business Development BI SBS 2.0

YoY per Basic Type - US



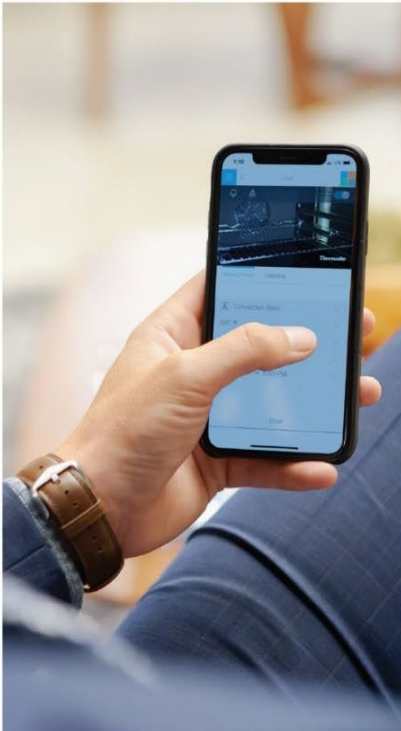
B/S/H/

Who is this product for?



THE CULINARY IMPRESSIVE

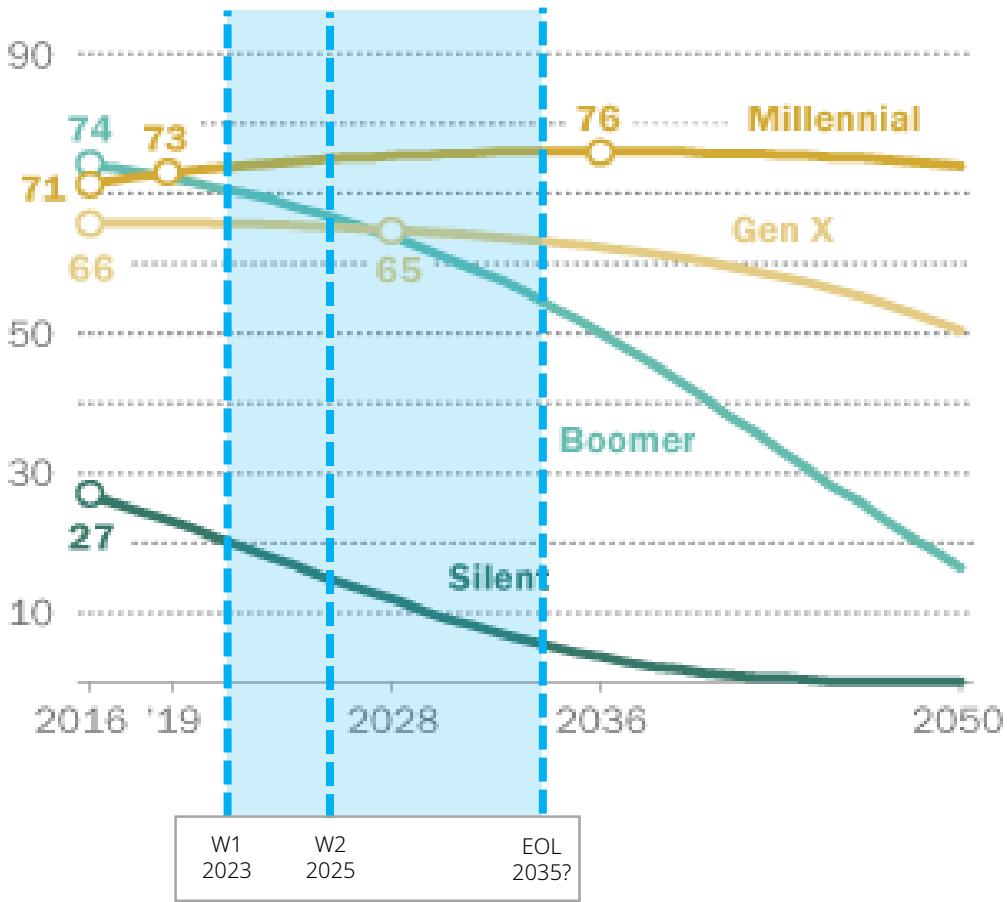
Well-informed and well-traveled with complex, elevated palates, Culinary Impressives make every meal a conversation starter. They fully immerse themselves and their guests in every aspect of cooking, from sharing the story behind a unique recipe to revealing how they chose each piece in their kitchen. For these bold cooks, every bite is an adventure—and they take pride in bringing family and friends along for the ride.



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Which Generation Fuels The Future Thermador Consumer?

Projected US Population in Millions**



MILLENNIAL (1981 – 1996)
 Consumer Age Range*: 27-54 years
 Context: Globalization, Economic Stability, Emerging Internet
 Behavior: Globalist, Questioning, Oriented to Self
 Consumption: Experience, Festivals, Travel, Flagships

GEN X (1965 – 1980)
 Consumer Age Range*: 43-70 years
 Context: Political Transition, Capitalism and Meritocracy Dominate
 Behavior: Materialistic, Competitive, Individualistic
 Consumption: Status, Brands and Cars, Luxury Articles

Likely Most Influential Groups for BI SBS 2.0



BABY BOOMER (1946 – 1964)
 Consumer Age Range*: 59-89 years
 Context: Postwar, Dictatorships
 Behavior: Idealism, Revolutionary, Collectivist
 Consumption: Ideology, Vinyl and Movies

*Median Consumer Age range during project life time from 2023 - 2035
 ** Source: Tabulation of US Census Bureau
<https://www.pewresearch.org/fact-tank/2018/03/01/millennials-overtake-baby-boomers/>

**We've spent a lot of quality
time with our consumer.**

SPENDING TIME WITH LUXURY CONSUMERS ACROSS THE GLOBE



2018

2019

2020

2021

FRESHNESS ICE & WATER STUDY



DESIGNER IMMERSIONS



BUILT-IN CONFIGURATION TESTING



DESIGN + AESTHETICS TESTING



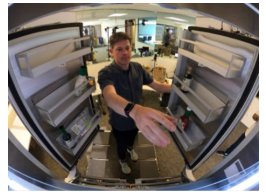
SMART INVENTORY SYSTEM TEST



DESIGN ACCEPTANCE & UX TESTING



DIGITAL FEATURES CONSUMER TESTING



ETHNOGRAPHY



CONJOINT ANALYSIS



myClimate Study



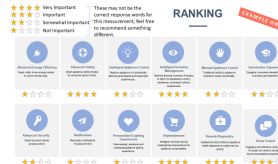
DESIGNER IMMERSION CONCEPT TESTING



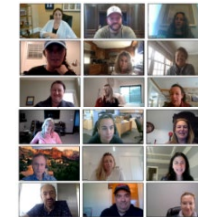
BSH Internal "Schulterblick"



DIGITALIZATION TEST



UI USER TEST



PDF USABILITY CONSUMER TESTING



Wine Journey



Ethnography



Food Journey

INTERVIEW FLOW
Me and My Home
 Gather first impression of consumers' attitudes towards Me and their homes.
Me and My Kitchen
 Understand culinary behaviour & within this context, the emotional role of kitchen.
My Cooking
 Understand routines, problems, workarounds and open desires from planning to cleaning.
My Appliances
 Gather hunches for improvements via functional exploration of the kitchen.
Connectivity – Today & Tomorrow
 Understand the current benefits, barriers and future potentials of connected kitchens.

BI Luxury Research



UX Test



GG "Gourmet vitrine"



UX Test Design-to-Value



UI Usability Test



More coming this year...

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#1 Consumer Choice

Powerful Portfolio

More Market Access With A Large Product Portfolio



Delight the trade and the consumer with **choice** to enable standard North American kitchen styles and sizes.

Also give consumers the ability to choose the right refrigerator size for their personal storage needs.

B/S/H/

Revolutionizing the Replacement Fit

New Offering – More Access with First to Market integrated 42" & 48" Bottom Mount Combinations.



- 42" -

- 48" -

B S H R N A STRATEGY

- Deliver to established built-in cabinet dimensions (42", 48")
- Deliver a unique design together with unique feature innovation

Disrupt Replacement Market.

Capitalize on additional 31% Market Access.

Key to Market Leadership Position.

B/S/H/

Powerful Portfolio

The Thermador Built-in Refrigeration Product Offer



Single Door
Columns



Bottom Mounts

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B/S/H/

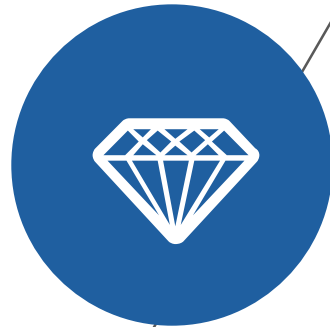
Meaningful Consumer Experience

Meaningful Luxury Refrigeration

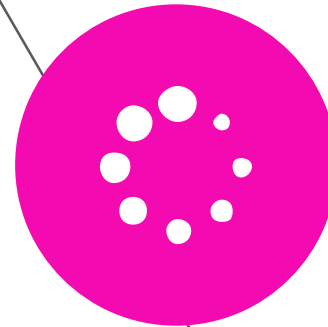
Hardware and Digital Experiences to delight our consumer

Unmatched Luxury Hardware

Aspirational Design
Elevated Ice and Water
Adaptable Freshness



BI SBS 2.0



Meaningful Digital Experience

Continuous, lifetime
consumer engagement and
ever evolving product
experience.

**Real Innovation Transforms
Luxury Refrigeration**





Internal Water Dispense

Thermador
Deli Drawer + Split Shelves



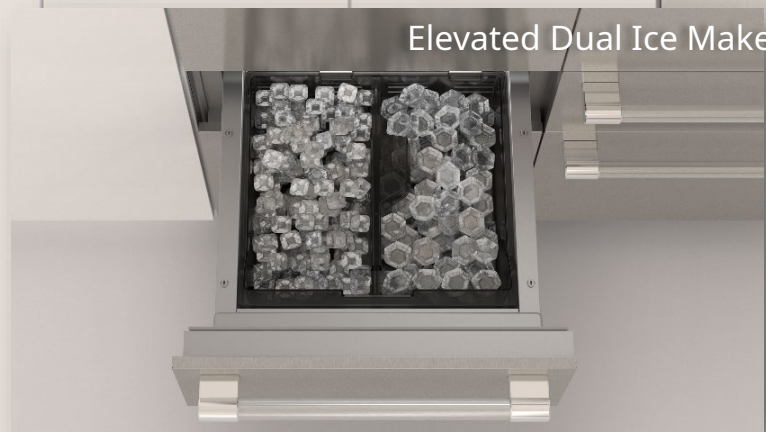
Gallon Bin



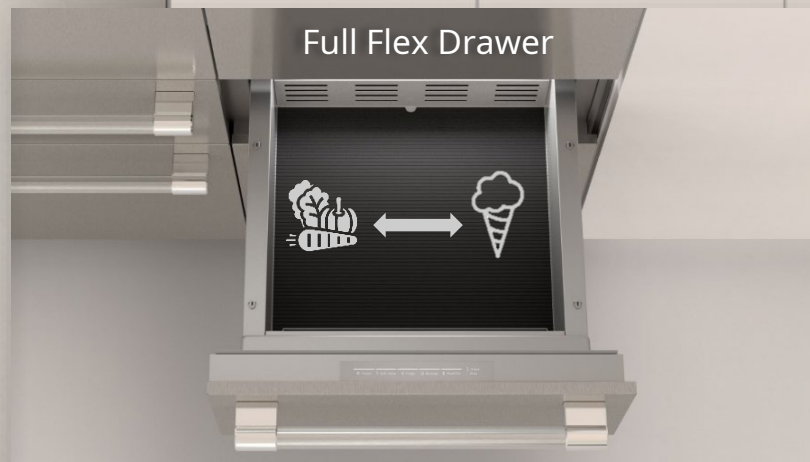
ThermaFresh Pro

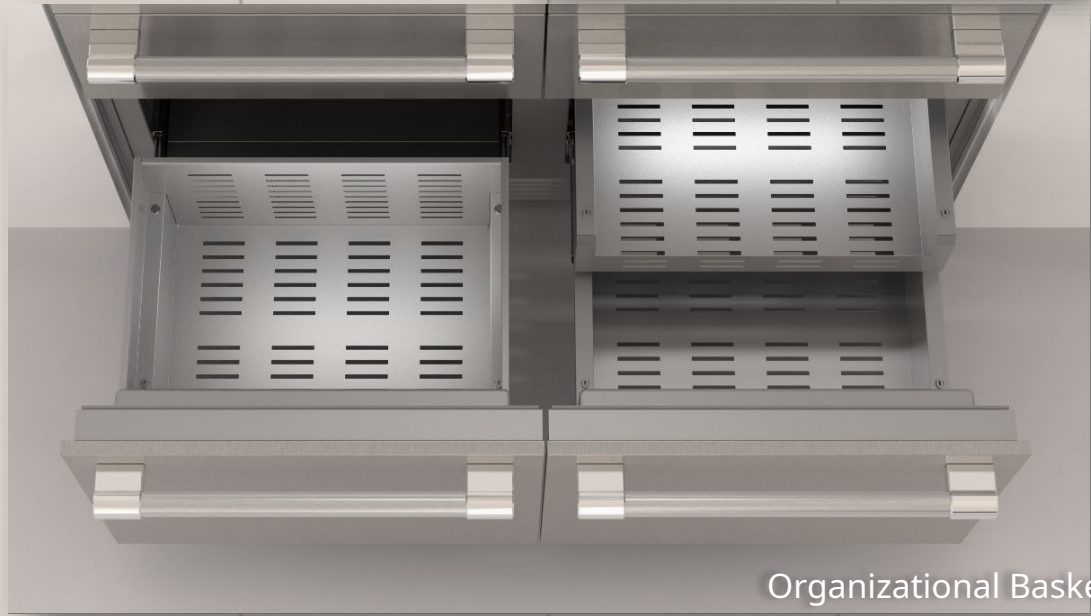


Elevated Dual Ice Maker



Full Flex Drawer





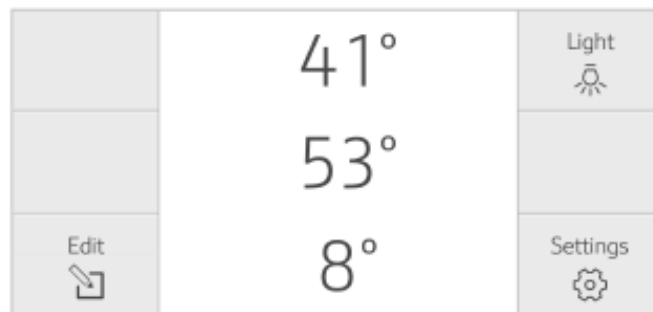
Organizational Baskets



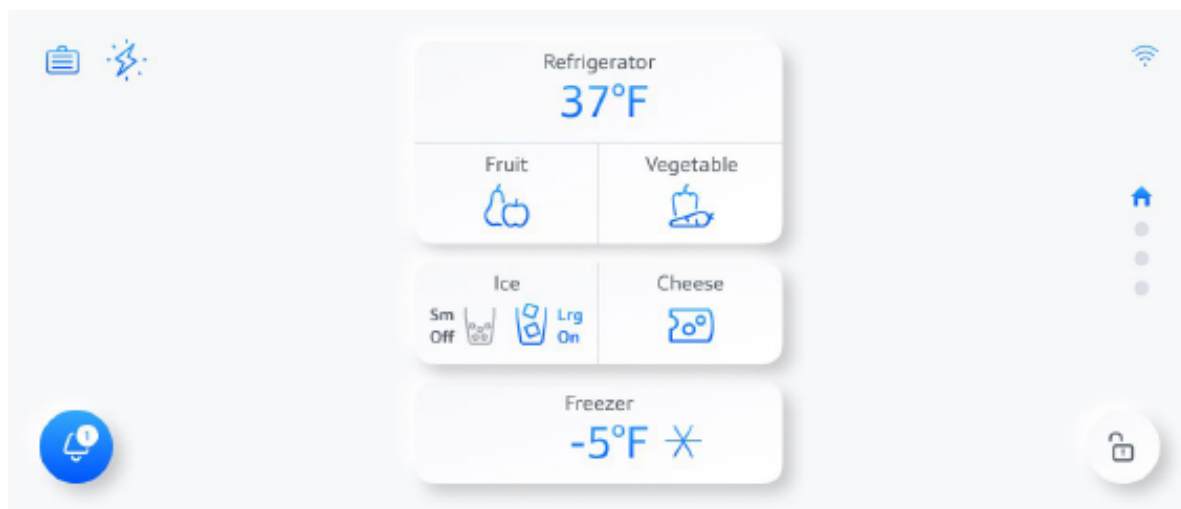
A NEW LOOK & FEEL

- Intuitive “smart phone like” touch interactions.
- Provides right information at the right time.
- Layout mirrors the appliance structure.
- Options are content driven.
- Expresses technical capacity.
- Design is unique for Thermador.
- Neumorphic design
 - modern, minimalist
 - just enough depth & visual interest
 - supports usability

Existing UI

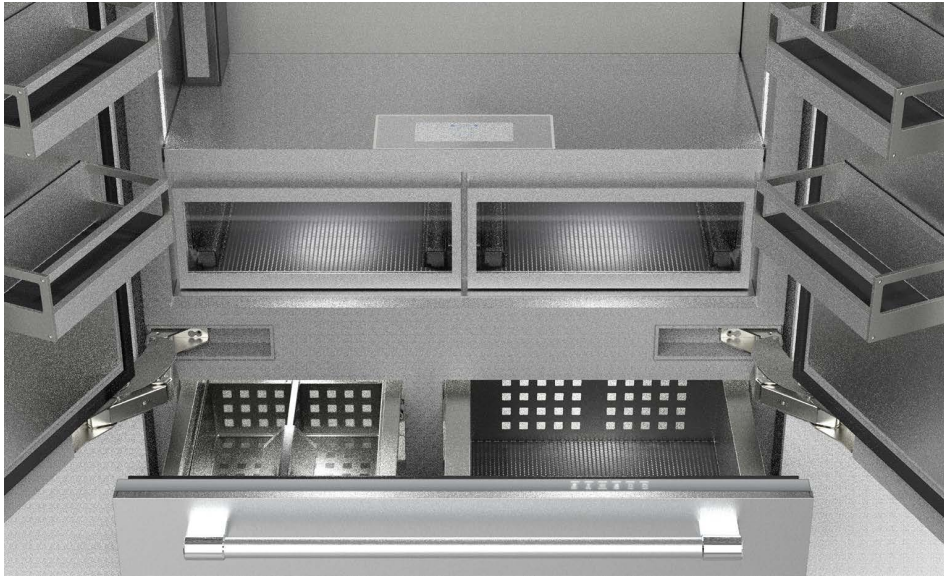


New UI



Drawer Configuration

Differences between 36"/42" and 48"



- 36"/42" -



- 48" -

Full Flex Drawer Configuration

**36" Built-in Two Door Bottom Mount
36" Built-in French Door Two Drawer**



*Single Ice Maker – diamond ice

42" Built-in French Door Two Drawer



Dual Ice Maker – diamond ice and cocktail ice

48" Built-in French Door Four Drawer



Dual Ice Maker – diamond ice and cocktail ice

Meaningful Digital



Consumer Value Proposition



Camera in Fridge



Camera in Fridge

DELIVER A MEANINGFUL DIGITAL EXPERIENCE



Coming 2024

Intelligent Inventory Management

Machine learning inventory AI engine to allow for seamless inventory monitoring, ordering and consumption experiences

- Inventory list update based on OR¹ as enabler for smart groceries use cases (i.e. recipes based on stock)

Intelligent Appliance Control

Reactive appliance AI contextually delivers personalized and meaningful experiences.

- Semi-automatic Thermafresh settings
- Extended data logging as enabler for potential future "learning appliance" implemented

Replenishment

Intelligent and time saving replenishment transactions for appliance consumables.

- Filter reordering through HC App

Introduction Experience

Engaging consumer onboarding and everyday use experience.

- Pre-purchase: Extensive demo / showroom mode & HC demo appliance
- Post-purchase appliance introductions on UI and in HC

Personalized Experiences

Personalized, emotional and contextual appliance experience.

- Individual presets for FullFlex and VitaFresh Drawer
- Individual light brightness adjustment and ambient light sensor for auto-adjustment

Voice Control

Engaging and effective voice control for super convenient, hands and device free appliance experiences.

- Remote control functionalities like changing temperature or mode
- Beyond remote control use cases like adding items to HC inventory list

Notifications

Meaningful notifications for peace of mind

- Flex drawer transition time / transition finished
- Filter Status updates
- Food safety critical notifications

Remote Diagnostics

Fastest and most effective appliance health diagnosis to enable service quickly.

- Standard remote diagnostics functionalities
- Extended data logging as enabler for more sophisticated remote diagnostics capabilities implemented

Manual Appliance Control

Traditional hands on appliance command center functionality.

- Fully fledged remote monitoring and control of the appliance

Advanced Energy Efficiency

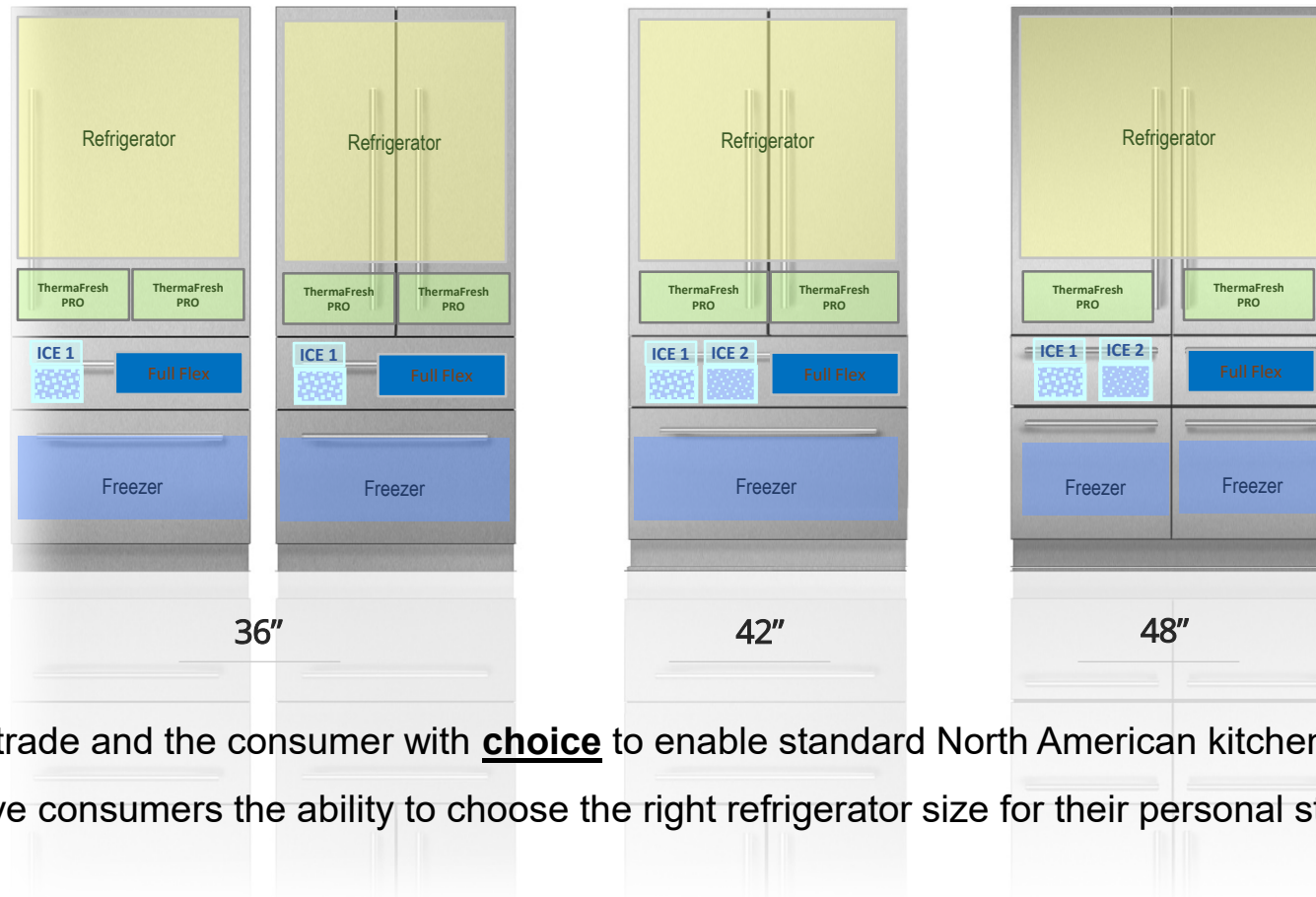
Smart, utility driven energy modes to unlock real savings.

- Smart grid / demand response functionalities (can be utilized by 3rd party energy manager)

Partner Enabled

Powerful Portfolio

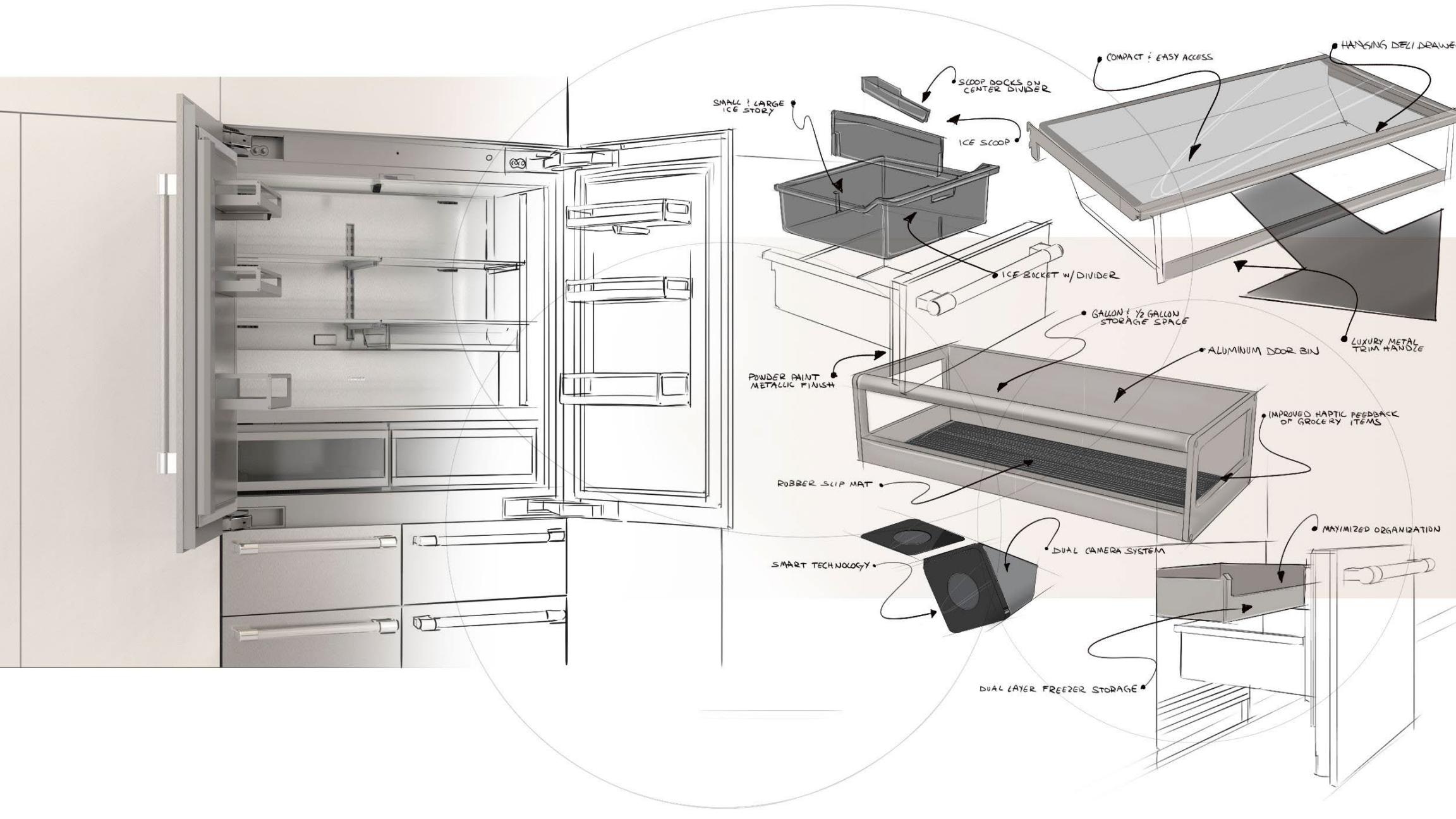
More Market Access With A Large Product Portfolio



Delight the trade and the consumer with **choice** to enable standard North American kitchen styles and sizes.

Also give consumers the ability to choose the right refrigerator size for their personal storage needs.

B/S/H/



SMALL & LARGE ICE STORY

SCOOP DOCKS ON CENTER DIVIDER

ICE SCOOP

COMPACT & EASY ACCESS

HANGING DELI DRAWER

ICE BUCKET W/ DIVIDER

GALLON & 1/2 GALLON STORAGE SPACE

ALUMINUM DOOR BIN

LUXURY METAL TRIM HANDLE

POWDER PAINT METALLIC FINISH

IMPROVED HAPTIC FEEDBACK OF GROCERY ITEMS

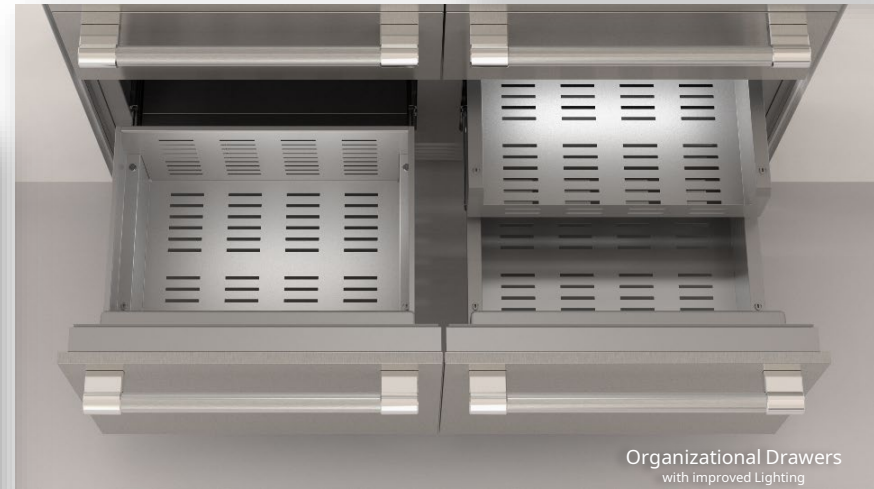
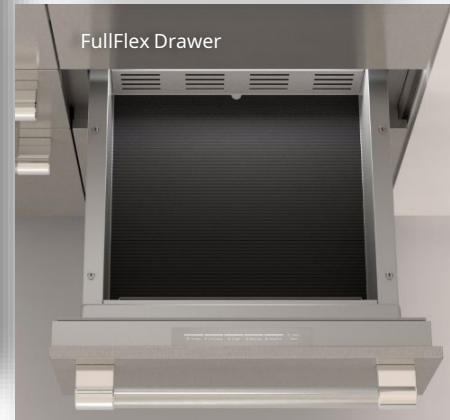
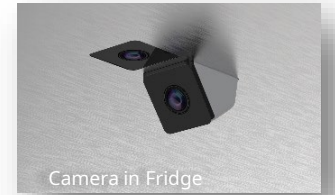
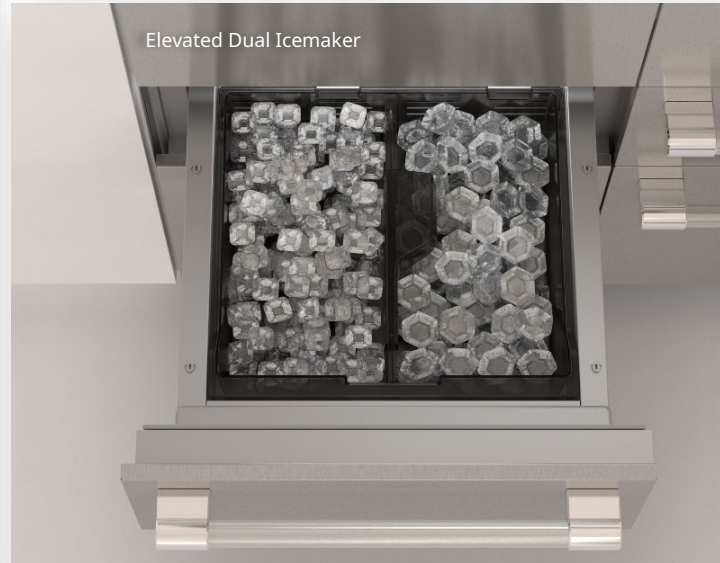
RUBBER SLIP MAT

SMART TECHNOLOGY

DUAL CAMERA SYSTEM

DUAL LAYER FREEZER STORAGE

MAXIMIZED ORGANIZATION



B/S/H/

Time To Market

Launch Dates

2024



SoS: Q2 2024

Single Door
BM

- 36" -

FDBM

T36IB100SP Custom Panel

T36BB110SS Masterpiece

T36BB120SS Professional

UMRP Custom Panel:
\$9,999*

T36IT100NP Custom Panel

T36BT110NS Masterpiece

T36BT120NS Professional

UMRP Custom Panel:
\$10,499*

SoS: Q1 2024

- 42" -

T42IT100NP Custom Panel

T42BT110NS Masterpiece

T42BT120NS Professional

UMRP Custom Panel:
\$12,499*

- 48" -

T48IT100NP Custom Panel

T48BT110NS Masterpiece

T48BT120NS Professional

UMRP Custom Panel:
\$14,499*

B/S/H/

*Price may vary until launch

Competitor Comparison

Built-In 48" Comparison

Width: 48" / Height: 84"

LG Signature
New 48" Bottom Mount



**Price Not
Announced**

Highlights:

- First competitor on 48" BM Market
- "Lift&Go Drawers" for easy cleaning
- Full-flex drawer
- Dual Ice Maker
- "True" Cocktail Ice
- Internal Water Dispenser

Thermador
T48BT120NS



Price \$15,999*

Highlights:

- Deli Drawer
- Gallon Bin
- Camera in fridge
- New Innovative UI
- ThermaFresh Pro
- Full Flex Drawer
- Dual Ice Maker (Diamond+Cocktail)
- Organizational Freezer Baskets
- Internal Water Dispenser

Sub-Zero
PRO4850



Price \$20,390

Highlights:

- 2 metal shelf drawers
- "NASA" Air Purification System
- SbS with a Bottom Mount Look
- Slide out shelves
- Drawer Flexible Dividers

B/S/H/

*Price may vary until launch

Built-In 42" Comparison

Width: 42" / Height: 84"

Dacor
DRF425300AP



Price \$9,999

Highlights:

- Temperature Controlled Doors
- Hidden Touch Control Panel
- Internal Water
- 4 Door Design

Thermador
T42BT120NS



Price \$13,999*

Highlights:

- Deli Drawer
- Gallon Bin
- Camera in fridge
- New Innovative UI
- ThermaFresh Pro
- Full Flex Drawer
- Dual Ice Maker (Diamond+Cocktail)
- Organizational Freezer Baskets
- Internal Water Dispenser

Sub-Zero
BI-42UFDID/S



Price \$14,155

Highlights:

- Internal Water Dispenser
- "NASA" Air Purification System
- White Interior
- UI on top of the unit
- Wi-Fi Enabled

B/S/H/

*Price may vary until launch

Go to Market Strategy

Sales Tools

Available Now:

- Preliminary Spec Sheets
- Sell Sheet
- Images
- Line Drawings
- Teaser Video
- Custom Panel Dimensions

Refrigeration Share Point Link

T48IT100NP 48-INCH BUILT-IN FRENCH DOOR FOUR DRAWER REFRIGERATOR PANEL READY



Also Available In:
T48BT100NS - Pre-Assembled with Masterpiece® Handles
T48BT100NS - Pre-Assembled with Professional Handles

FEATURES & BENEFITS

- Intelligent Freshness System automatically sets optimal temperature and humidity for fruits and vegetables. ThermoFresh Pro technology keeps your food fresher longer.
- Flex drawer can be utilized as an additional refrigerator or freezer space for maximum versatility.
- Dual ice maker provides two sizes of ice, diamond ice and cocktail ice, perfect for entertaining.
- See what's inside without opening the door with four cameras located in the refrigerator cavity.

TEMPERATURE RANGES

Refrigerator	33°F (1°C) to 43°F (6°C)
SuperCool	34°F (1°C) for Approximately 6 Hours
Energy Saving (Economy) Mode	Refrigerator: 42°F (6°C) Freezer: 32°F (0°C)
Freezer	-7°F (-22°C) to 0°F (-16°C)
SuperFreeze®	-19°F (-28°C) for Approximately 8 Hours
Flex Drawer	0°F (-18°C) to 39°F (4°C)

GENERAL PROPERTIES

Home Connect™ (Wi-Fi Enabled)	Yes
Flex Drawer	Yes
Carbon Air Filter	Yes
Ethylene Filter	2
Lighting	LED SideWall and Theater Lighting
Dual Compressions / Evaporators	Yes
SoftClose® Drawers	Yes
Adjustable Shelves - Refrigerator	4
Shelf Material	Glass w/Metal Profile
ThermoFresh Temperature & Humidity Managed Drawers	2
Non-slip Mats	10
Standard Door Bins - Refrigerator	4
Gallon Door Bins - Refrigerator	2
Defrost Process - Freezer	Automatic
Freezer Drawers	2
Internal Water Dispenser with Water Filter	Yes
SoftClose® Door	Yes
Ice Maker with Diamond Ice System	Dual System w/ two sizes
Door Open Alarms	Yes
Full Extension Drawers @ 115° Door Opening Angle	Yes
Full Extension Drawers @ 90° Door Opening Angle	Yes
Special Modes	Sabbath, Economy, Vacation, Theater

CAPACITY

Total Capacity (cu. ft.)	27.7 cu. ft.
Refrigerator / Freezer Capacity (cu. ft.)	18.4 / 4.9 cu. ft.

TECHNICAL DETAILS

Current (A) / Volts (V) / Frequency (Hz)	15 A / 115 V / 60 Hz
Power Cord Length (in.)	TBD
Plug Type	120V/3 Prong

DIMENSIONS & WEIGHT

Appliance Dimensions (H x W x D) (in.)	83 7/8" x 47 1/2" x 24"
Appliance Dimensions with Hinges and Doors (H x W x D) (in.)	83 7/8" x 47 1/2" x 24"
Appliance Dimensions with Hinges and Doors, No Handles (H x W x D) (in.)	84" x 48" x 25"
Net / Gross Weight(s)	654 / 673 lbs.

EFFICIENCY

ENERGY STAR® Certified	Yes
Annual Energy Consumption	675 kWh / yr

Page 1 of 2
Specifications are subject to change without notice. Refer to installation instructions and consult your consumer engineer prior to installation. Consult with a heating and ventilation engineer for your specific ventilation requirements. For the most detailed information, refer to installation instructions accompanying product or visit us Thermador.com for the master reader. Specifications are current as of time of printing. Thermador reserves the right to change product specifications or design without notice. Some models are certified for use in Canada. Thermador is not responsible for products that are transported from the U.S. for use in Canada.
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Manufacturing Defect 2 Year
3rd to 6th Year
7th to 12th Year
Lifetime

Home Connect™
Sealed Water Dispenser
FullFlex Drawer
36", 42", and 48" Widths

HEATKRITZO - 13W @ 120V
Freeborn® Heater Kit
When two appliances are installed side-by-side a sealing kit must be used. For combinations that involve a freezer column, this sealing kit is included. For all other frons in additional, i.e. two wine columns, two bottom freezers, etc.) side-by-side combinations or instances where any appliances are installed less than 6-inches (152 mm) apart from one another but not connected side-by-side, purchase this kit. This kit is recommended for use with any installation in areas that are subject to humidity, or located next to an outside wall.

Page 2 of 2

Revolutionizing Refrigeration Once Again

All-New Built-in Bottom-Mount Collection Coming 2023
 Thermador built-in bottom-mount Refrigeration returns in a big way with the exciting expansion of the Freedom® Collection. Offering single-configuration solutions that combine Refrigerator and Freezer into 36", 42", and 48" widths, the powerful Thermador portfolio will provide consumers more features, more innovation, and more choices for exceptional preservation, truly personalized.

Seamless built-in aesthetic with midline drawer handles matching the height of undercounter products like Dishwasher for enhanced visual continuity.
 Outfitted with luxury hardware for an elevated look and feel.
 Available in Professional and Masterpiece® Collection seamless steel designs as well as custom panel.
 Offered in 36", 42", and 48" widths.
 Available in single-door and French-door configurations with bottom-mount freezer drawers.

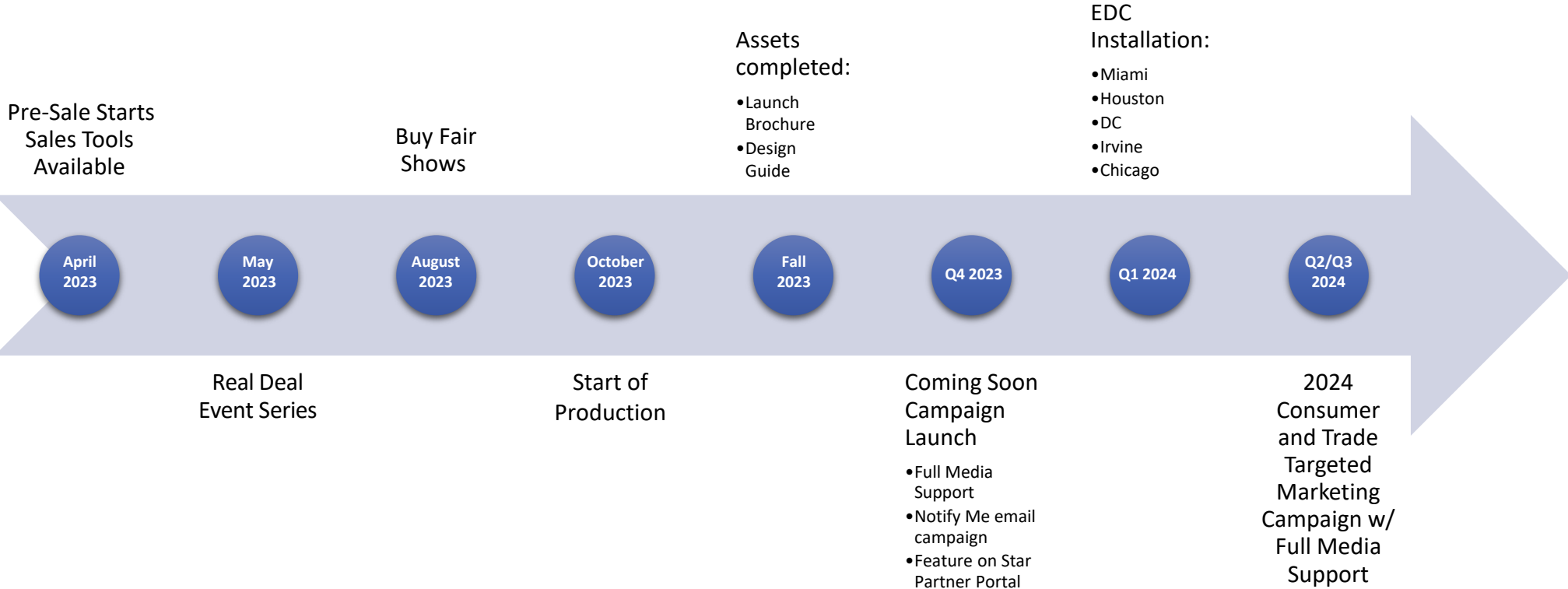
Feature Highlights

- Dual Ice**
Ice is always ready with our Elevated Dual Ice Makers, including our signature Diamond for plus-size rock-solid ice in a unique geometric shape.
*42" and 48" only.
- Updated UI**
Our interface has been expanded and redesigned for an even better user experience, plus a dedicated UI for FullFlex Drawer.
- FullFlex Drawer**
Reconfigure your FullFlex Drawer's temperature at any time with multiple settings from refrigerator to freeze, so you can store snacks, chill wine, soft-freeze ice cream, and more.

Masterpiece® Handles
 Dual and optional with the flexibility to harmonize products throughout the kitchen.

*Both new and classic handles are available.

Launch Calendar



Summary



Summary Slide



1 Market Leader

Next Generation will give us a the top position in the RNA market if we listen to the consumer demands



Revolutionary Bottom Mount Concept

Next generation of Bottom Mounts will help us grow largely in the Bottom Mount Market



Reinvented Replacement Market Fit

One plug preassembled solutions to help us gain massive market access unattainable before



Consumer Experience through a Digital Strategy

Consumer pains, gains and wants not only addressed by new portfolio, but also by post purchase experiences



#1 Built In Market Share

Dominate Luxury Cooling



#1 Cooling Choice Overall



#1 Bottom Mount Choice



#1 Columns Position

BSH to take lead role in the Luxury Market outperforming every competitor.

Thermador will take lead role gaining #1 MS in RNA.

B/S/H/

BSH Home Appliances Group

Thank you!

—

BSH Home Appliances Group