



Bedroom Furniture Market *Research & Analysis UK 2010*

Report Sample

**Bedroom Furniture Market Size & Review 2004-2010; SWOT & PEST Analysis,
Product Mix 2004-2014; Channel Mix 2004-2014; Market Leaders, Retailers'
Profiles & Key Financials; Market Forecasts to 2014**

March 2010

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This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

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Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, distribution channel mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT, Ansoff Matrix & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Distribution Channel Mix – Current & Future**

The report identifies the key distribution channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK BEDROOM FURNITURE MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Bedroom Furniture Market comprises of a range of products suitable for use within a domestic bedroom. Specifically, this report reviews the UK domestic bedroom furniture market between 2004 and 2010 with forecasts to 2014 for:-

- **Wardrobes**
- **Drawer Chests**
- **Bedside Tables**
- **Dressing Tables & Stools**
- **Childrens Bedroom Furniture**

This report further segments the market by:-

- **Fitted Bedroom Furniture**
- **Freestanding Bedroom Furniture**

The analysis also includes market sizes, trend review and mix for the following:-

- **Flat Pack Bedroom Furniture**
- **Rigid Bedroom Furniture**

The above includes all forms of materials and finishes used for bedroom furniture, including solid and veneer wood (oak, maple, birch, beech, pine, cherry etc), chipboard, MDF, OSB, resin, glass, aluminium, steel, leather / faux leather, foil finish, melamine etc. The above definitions exclude beds and associated storage units / under bed storage. Also excluded is upholstered furniture (e.g chaise longues, chairs etc) which are occasionally used in bedrooms. Products which are primarily designed and manufactured for use in non-domestic applications (ie hotels etc) are also excluded. Labour costs associated with installation are also excluded, with market sizes relating to material costs only.

Whilst the report provides market sizes and shares for each of the above key products, it should be noted that there is a degree of overlap between sectors. This is particularly the case between childrens furniture and other freestanding products and where products are sold as sets. Where market size estimates are provided, these are made on the basis of qualitative industry estimates of furniture purchases for this application coupled with quantitative analysis of supplier's financial information. Whilst we have made every effort to avoid double counting, there remain complexities of definition and size estimates should be regarded with a degree of caution.

The UK bedroom furniture market is currently valued at manufacturers selling prices, reflecting a market with a tentative closing price of \$1.2 billion in 2010, having grown by 10% over the last 2 years. The market is expected to continue to grow at an average rate of 5% per year over the next 5 years. The market value. This reflects a

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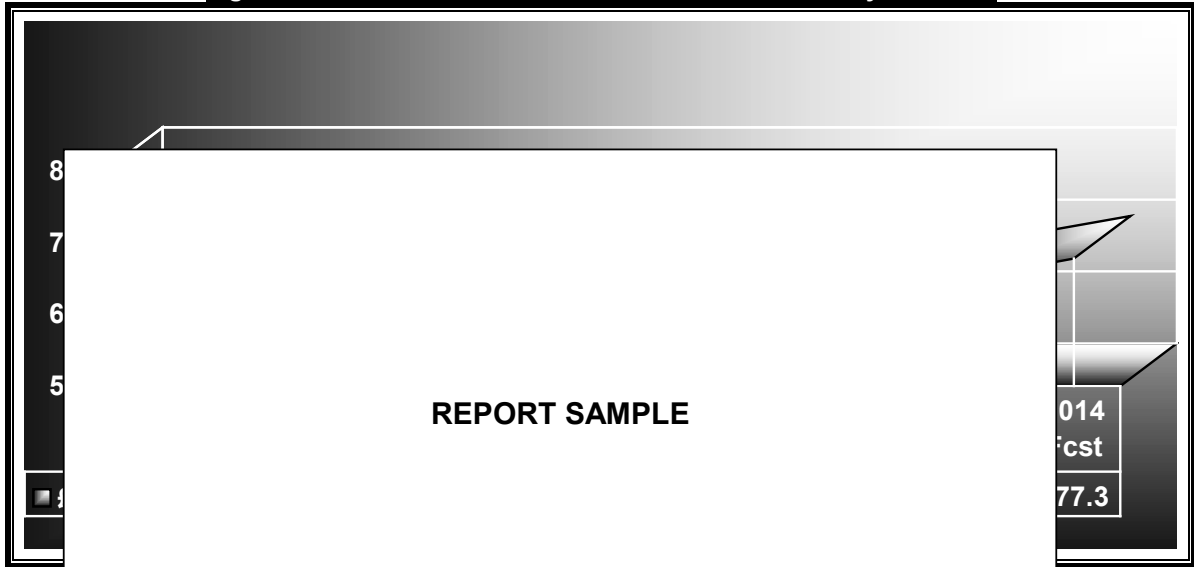
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2.2 BEDROOM FURNITURE MARKET SIZE & TRENDS 2004-2013

2.2.1 Bedroom Furniture Market Size 2004-2013 – Current Prices

The UK Bedroom Furniture market has is estimated to be worth just over £xxx million in 2010 as illustrated in the following chart:-

Figure 1: Bedroom Furniture Market – UK 2004 – 2013 By Value £m



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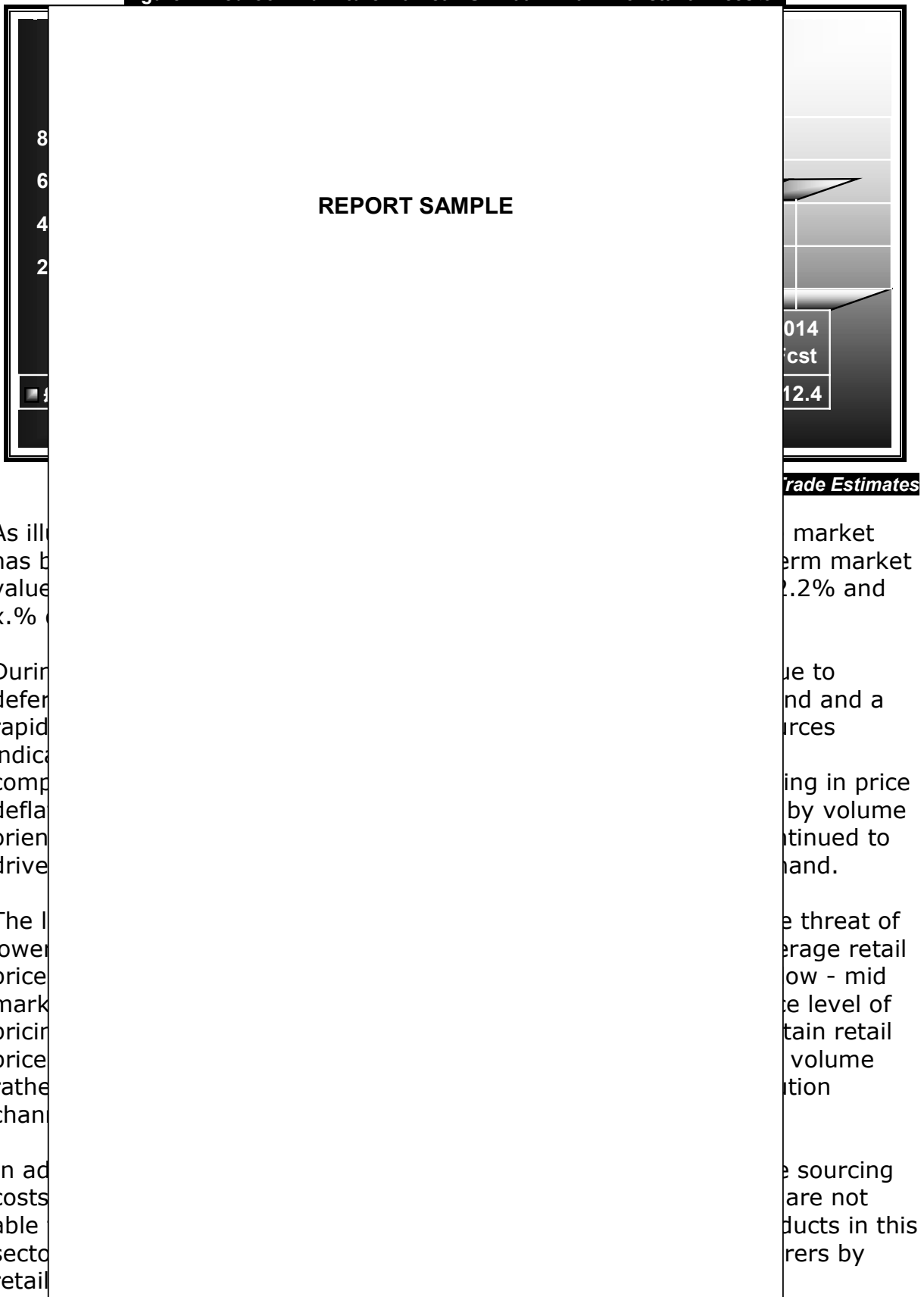
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2.2.2 Bedroom Furniture Market Size 2004-2014 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2014:-

Figure 2: Bedroom Furniture Market – UK 2004 – 2014 Constant Prices £M



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Output of the UK bedroom furniture manufacturers has declined rapidly since 2006, as illustrated in the following chart:-

Figure 3: Output by UK Bedroom Furniture Manufacturers 2004-2014 £m



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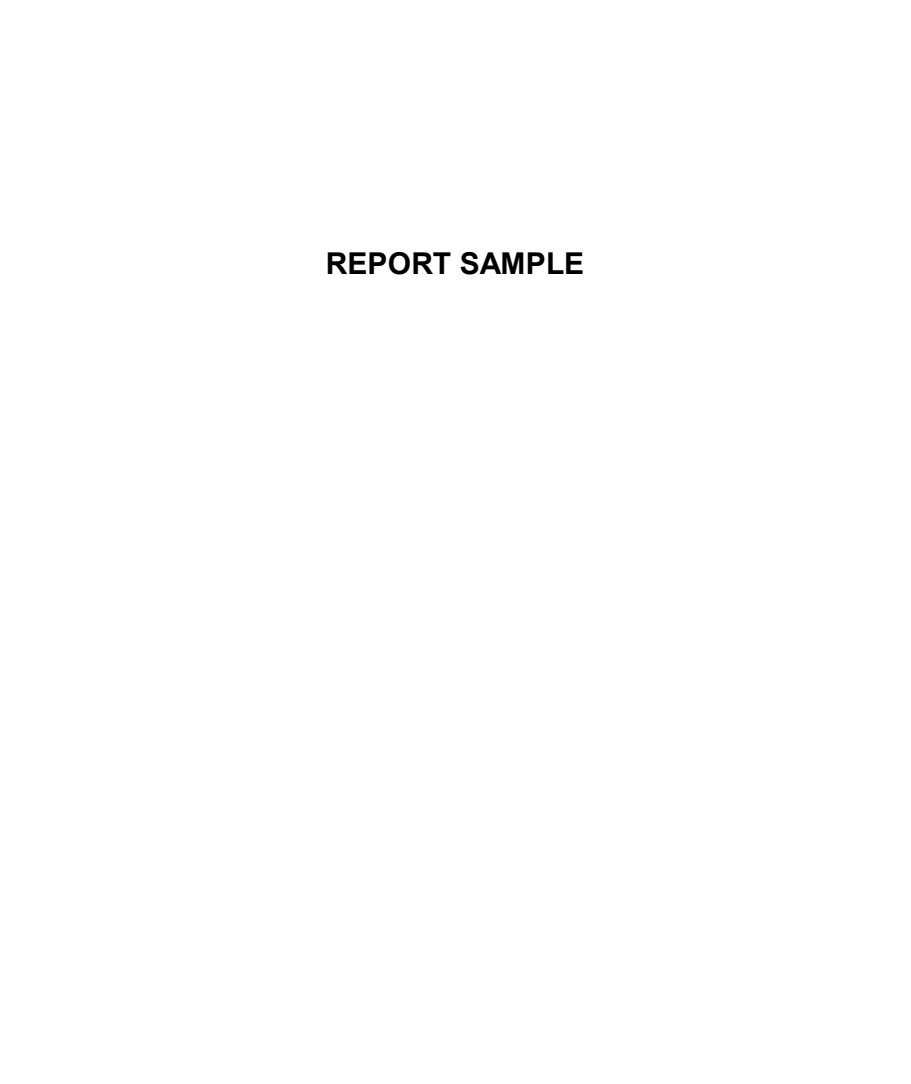
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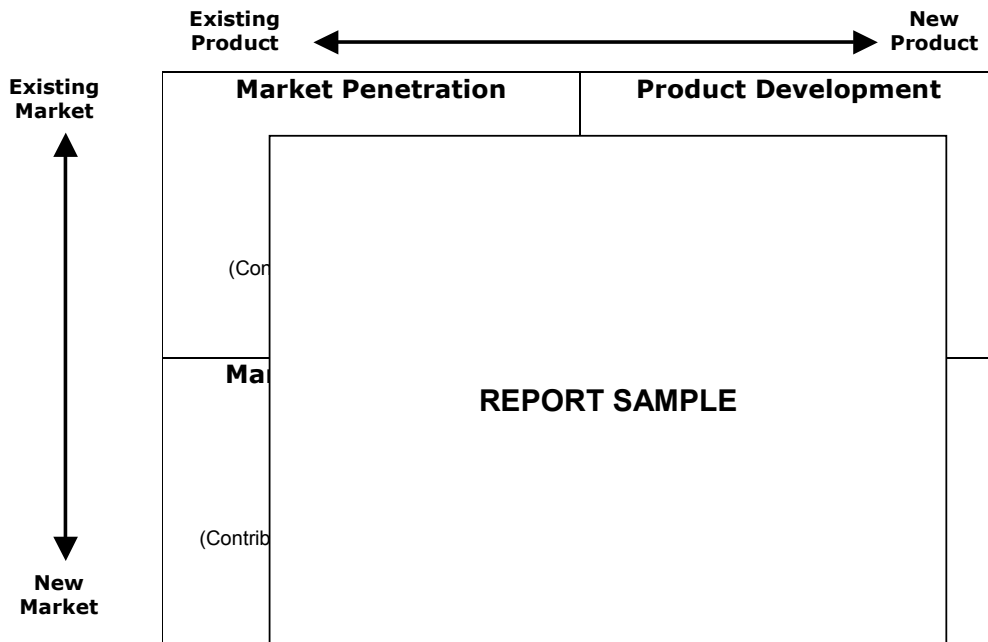


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The following table illustrates our estimates of the share by strategic direction for the anticipated 13% market growth to 2014:-

Chart 4: Bedroom Furniture Market Growth Share by Ansoff Strategy 2010-2014



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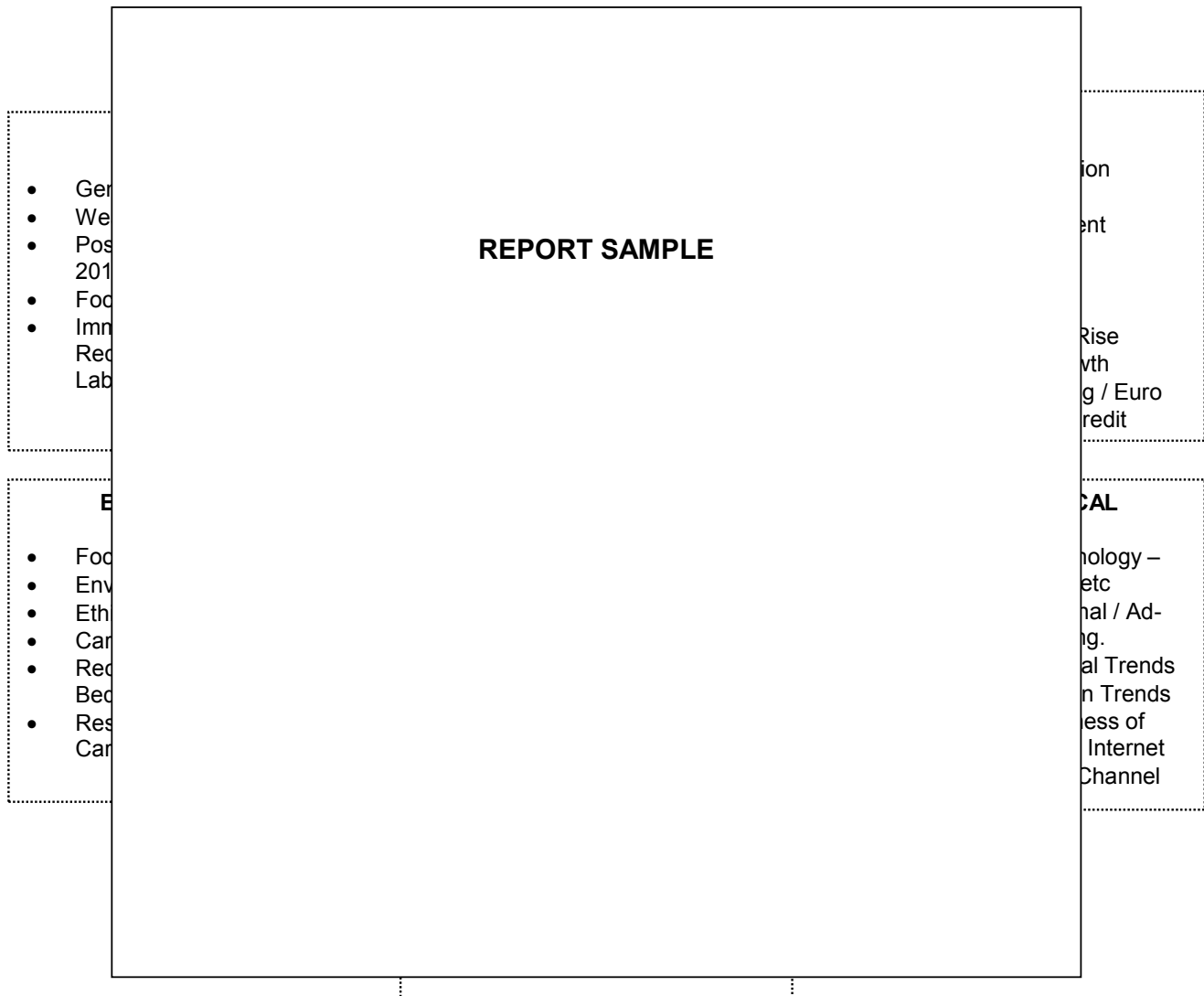
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2.3 KEY MARKET TRENDS IN THE BEDROOM FURNITURE MARKET

2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK Bedroom Furniture market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 5: PEST Analysis for UK Bedroom Furniture Market in 2010



Source: MTW Research Strategic Review 2010

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.3.2 Political & Legal Influences & Trends

2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the bedroom furniture market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

Figure 10: Key Strengths & Weaknesses in the Bedroom Furniture Market 2010-2014

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Inherently have • UK rather • High production • Focus on • Well managed • UK sector • Well established • High sector & export • Efficient retail add • Wide commodity • Sophisticated commodity • Most modern character • UK category definition 	<p style="text-align: center;">REPORT SAMPLE</p>

Source: MTW Research Strategic Review 2010

Key opportunities and threats evident in the market at present include:-

Figure 11: Key Opportunites & Threats in the Bedroom Furniture Market 2010-2013

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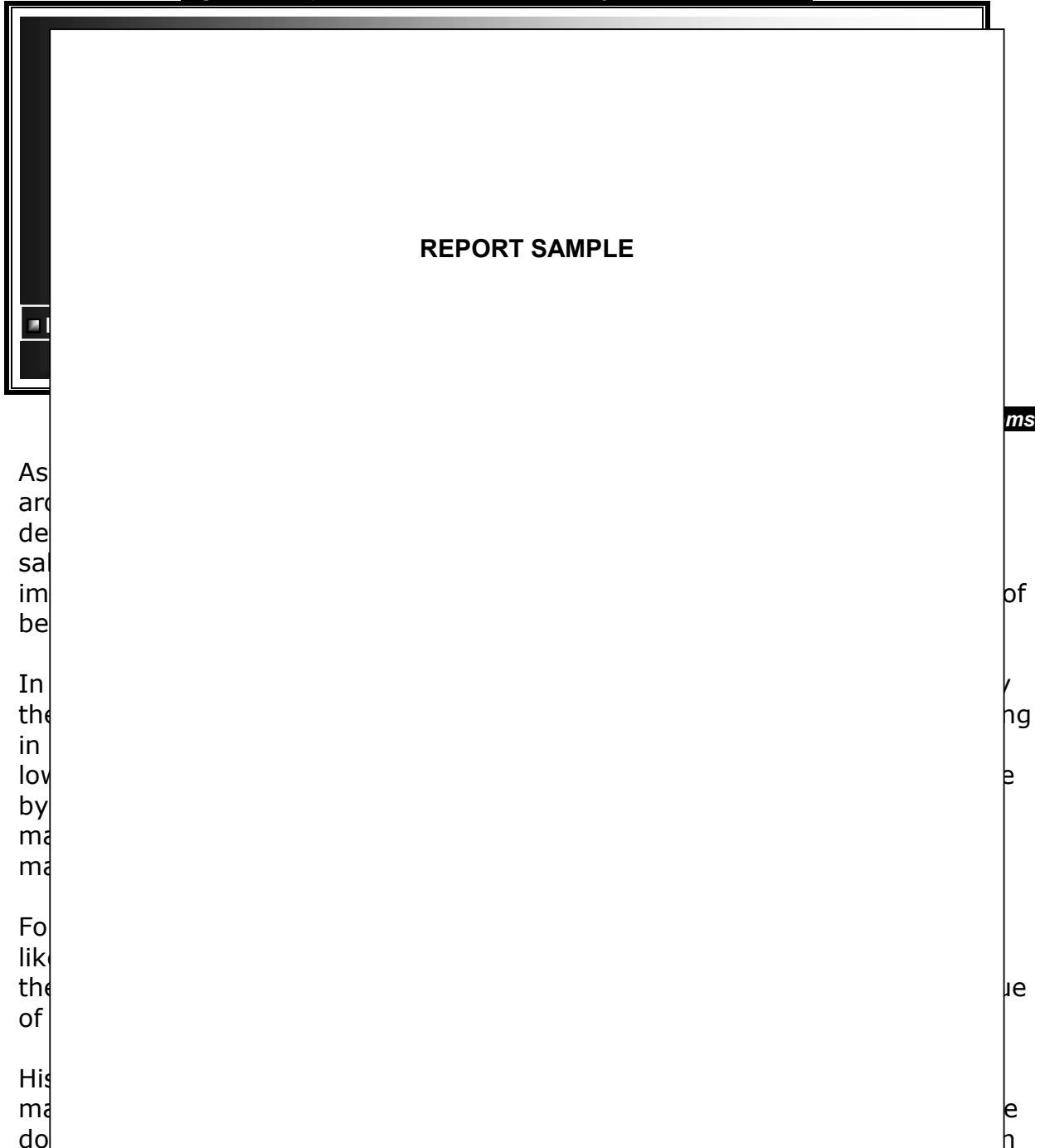
Source: MTW Research Strategic Review 2010

2.5 IMPORTS & EXPORTS OF FURNITURE 2004-2013

The UK bedroom furniture market has been increasingly dominated by the level of lower cost imports in recent years, with this issue a key inhibitor of growth within the low-mid market sectors.

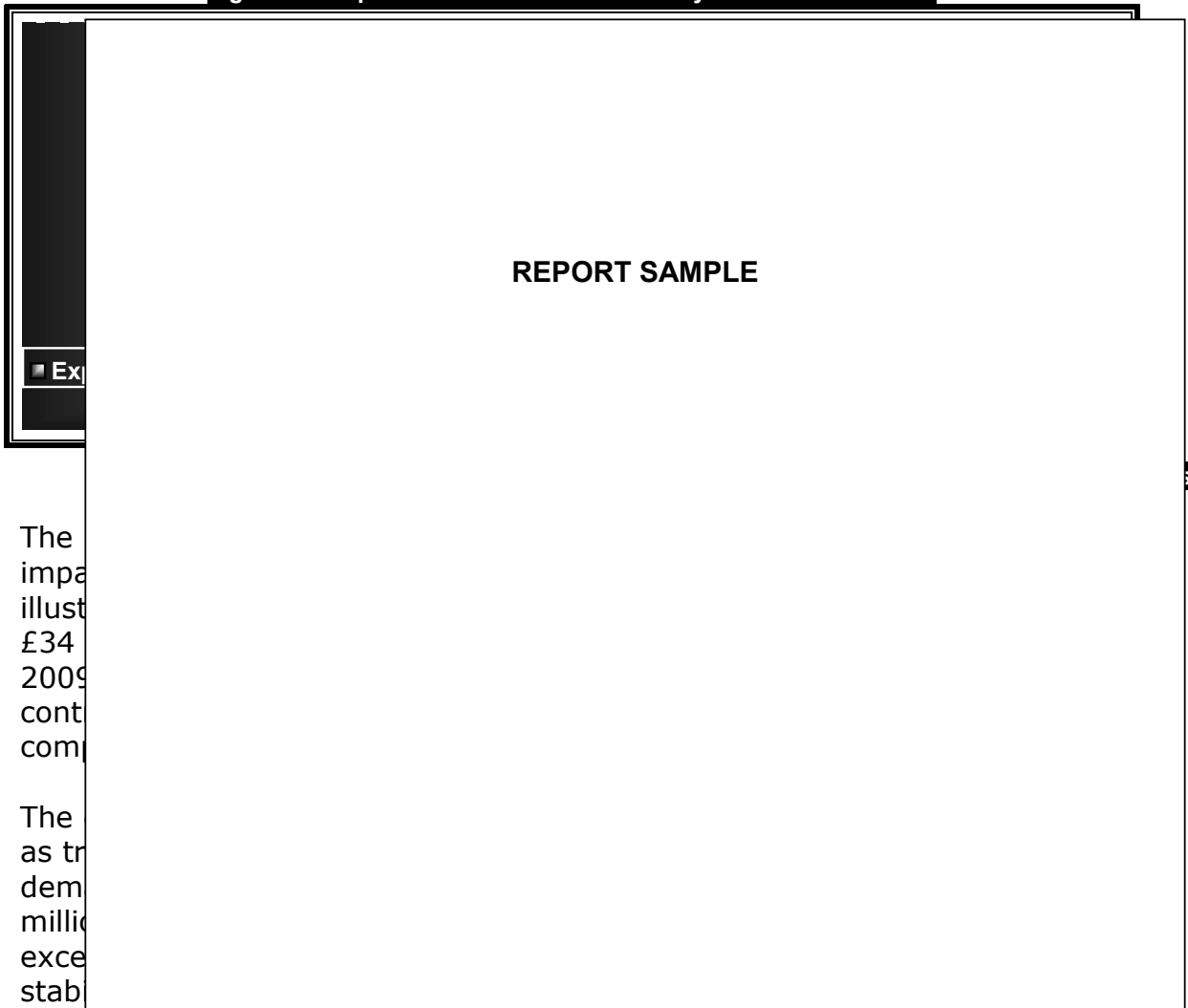
The following chart illustrates the level of imports of wooden bedroom furniture since 2004 and forecasts to 2014 in value terms:-

Figure 12: Imports of Bedroom Furniture By Value 2004-2013 £M



bedroom furniture since 2004 and forecasts to 2014 in value terms:-

Figure 13: Exports of Bedroom Furniture By Value 2004-2014 £M



The following chart illustrates the share by key target countries for bedroom furniture exports in 2010:-

Figure 14: Share by Key Export Region for Bedroom Furniture 2010



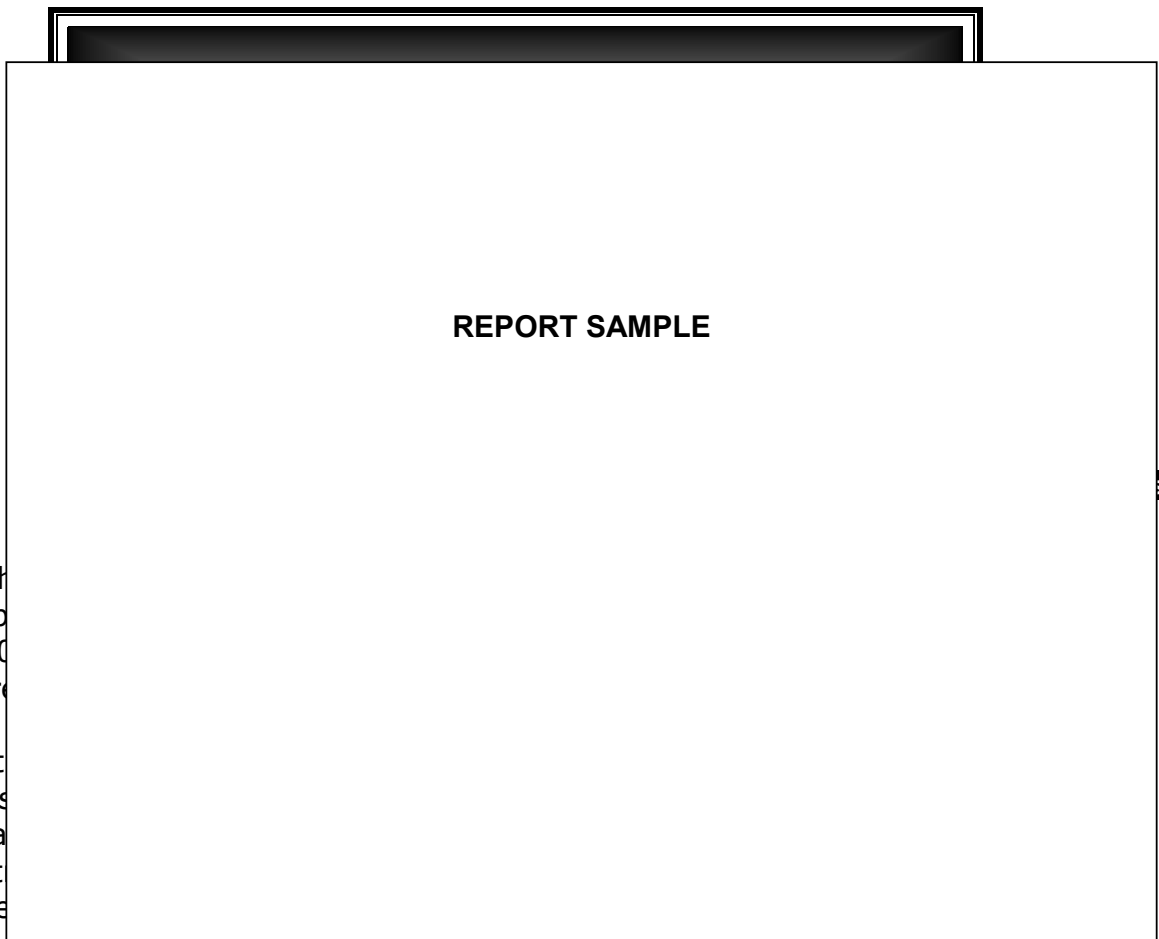
2.6 Regional Breakdown of Bedroom Furniture Sales in 2010

2.6.1 Sales Mix by England, Wales, Scotland & N. Ireland

There are a large number of complexities in determining breakdown of sales by region, given that many suppliers do not maintain accurate records of distribution by region. In addition, obviously the confidentiality of sales through the key distributors also adds further complexity when quantifying sales by a particular areas.

However, given these complexities, the following provides broad estimates of the sales breakdown in 2010 for bedroom furniture by each country in the United Kingdom:-

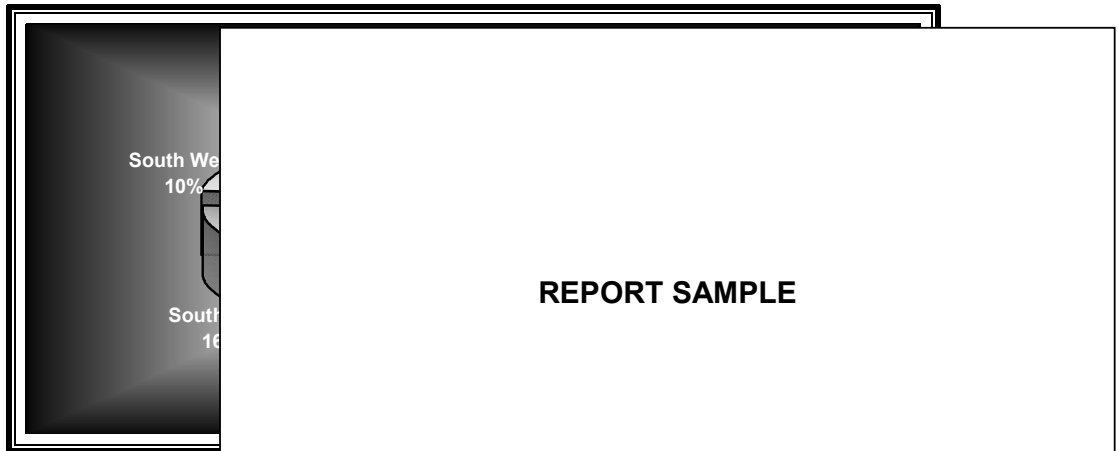
Figure 15: Bedroom Furniture Sales by UK Country 2010



2.6.2 Bedroom Furniture Sales by English Region 2010

The following chart illustrates our estimates of the sales mix for bedroom furniture by key English region in 2010:-

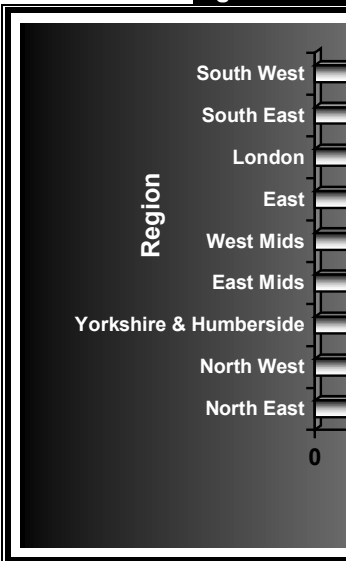
Figure 16: Bedroom Furniture Sales by English Region 2010



As illustrated, key sectors accounting for around furniture sales. Region xxxxxx at 5% and East

The estimated value of chart:-

Figure 17: Sa



xxxxxx and the xxxxx bedroom furniture sales that this is likely to cover trends and regional effects other areas. The xxx reflecting a lower level of households in this area and the generally lower economic health of the area in comparison to other areas.

2.7 Key Specification Criteria & Design Trends & Fashions in Bedroom Furniture

In terms of specifying bedroom furniture, there are a number of key issues which are indicated to impact on the purchasing process for bedroom furniture. These issues include but are not limited to:-

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3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2010, 2004 & 2013

The share accounted for by each of the key sectors within the UK bedroom furniture market in 2010 is illustrated in the following chart:-

Figure 18: Share by Product in Bedroom Furniture Market 2010



As the above wide range of sales of individual product sectors estimates are wardrobes, bed around xx% of

The childrens market by value volume demand market.

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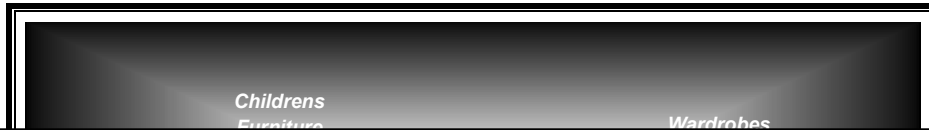
Drawer Chests sales in 2010, Sources indicate market in recent significance re

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lose some slight share in the longer term as pricing pressures are indicated to be relatively strong in this segment of the market.

In order to illustrate historical trends, the following chart illustrates the share by key product sector in 2004:-

Figure 19: Bedroom Furniture Product Mix by Value 2004



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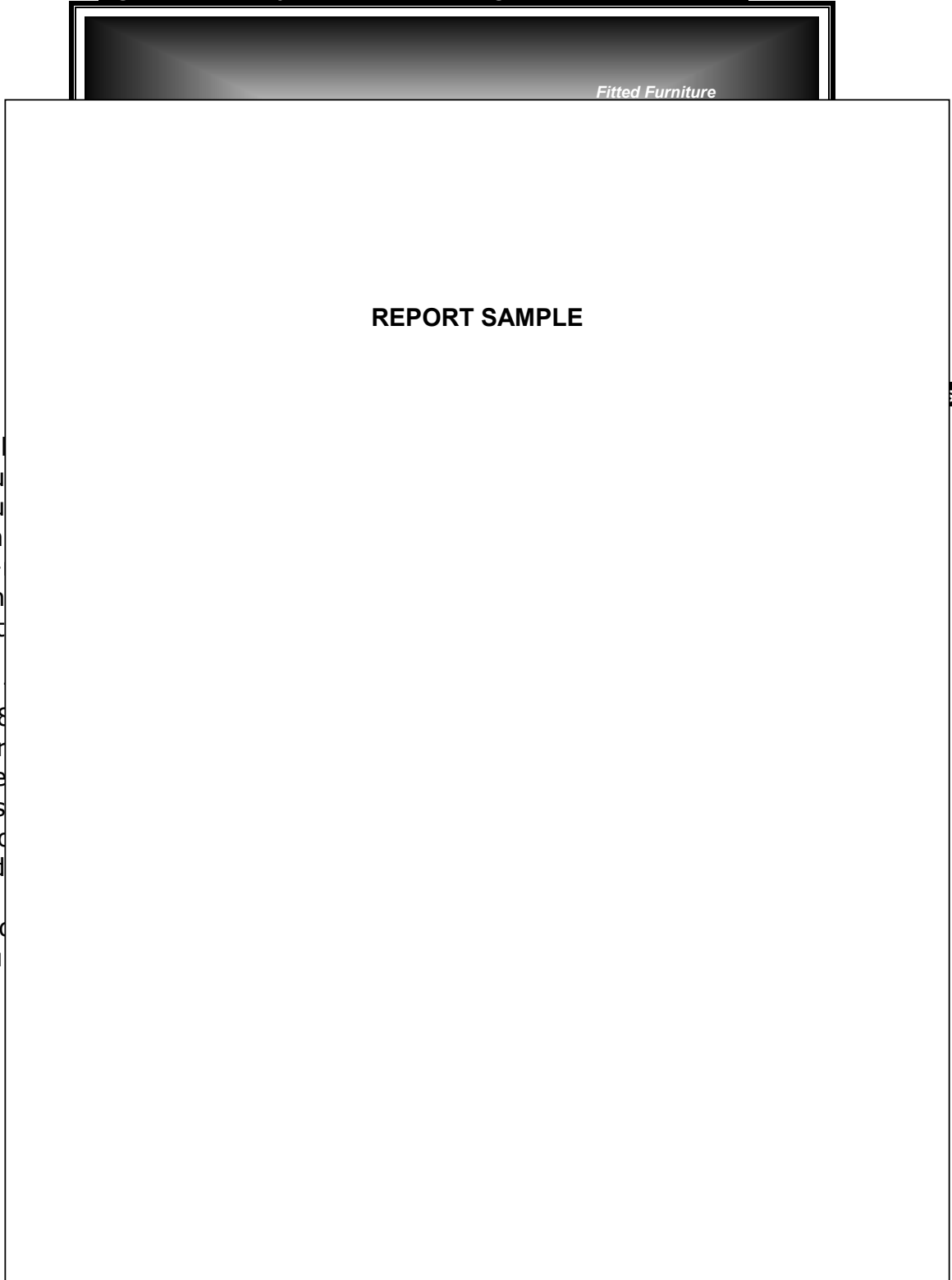
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3.2 Share & Key Trends for Fitted & Freestanding Bedroom Furniture 2010

The following chart illustrates our estimates of the mix by fitted and freestanding bedroom furniture in 2010 by value:-

Figure 21: Share by Fitted & Freestanding Bedroom Furniture 2010



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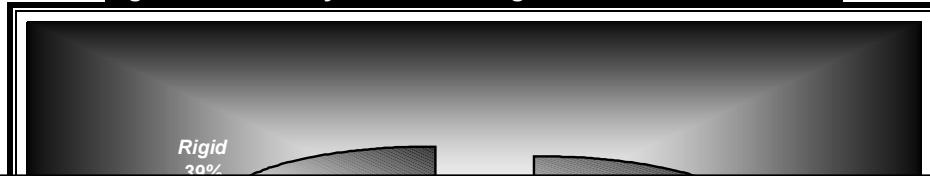
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3.3 Flat Pack Vs Rigid Bedroom Furniture Market 2010

The following chart illustrates the share accounted for by flat pack of rigid bedroom furniture products in 2010:-

Figure 22: Share by Flat Pack & Rigid Bedroom Furniture 2010



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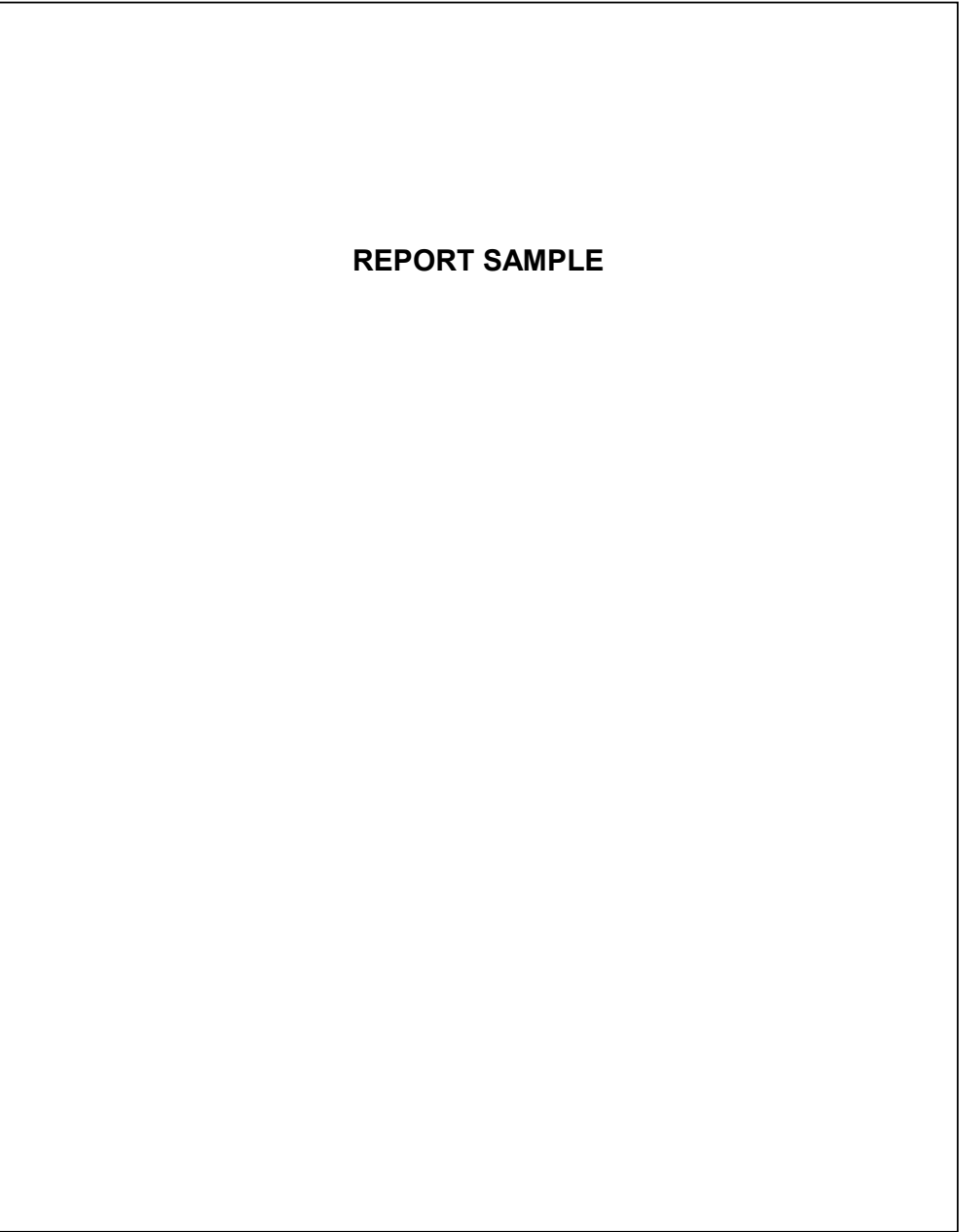
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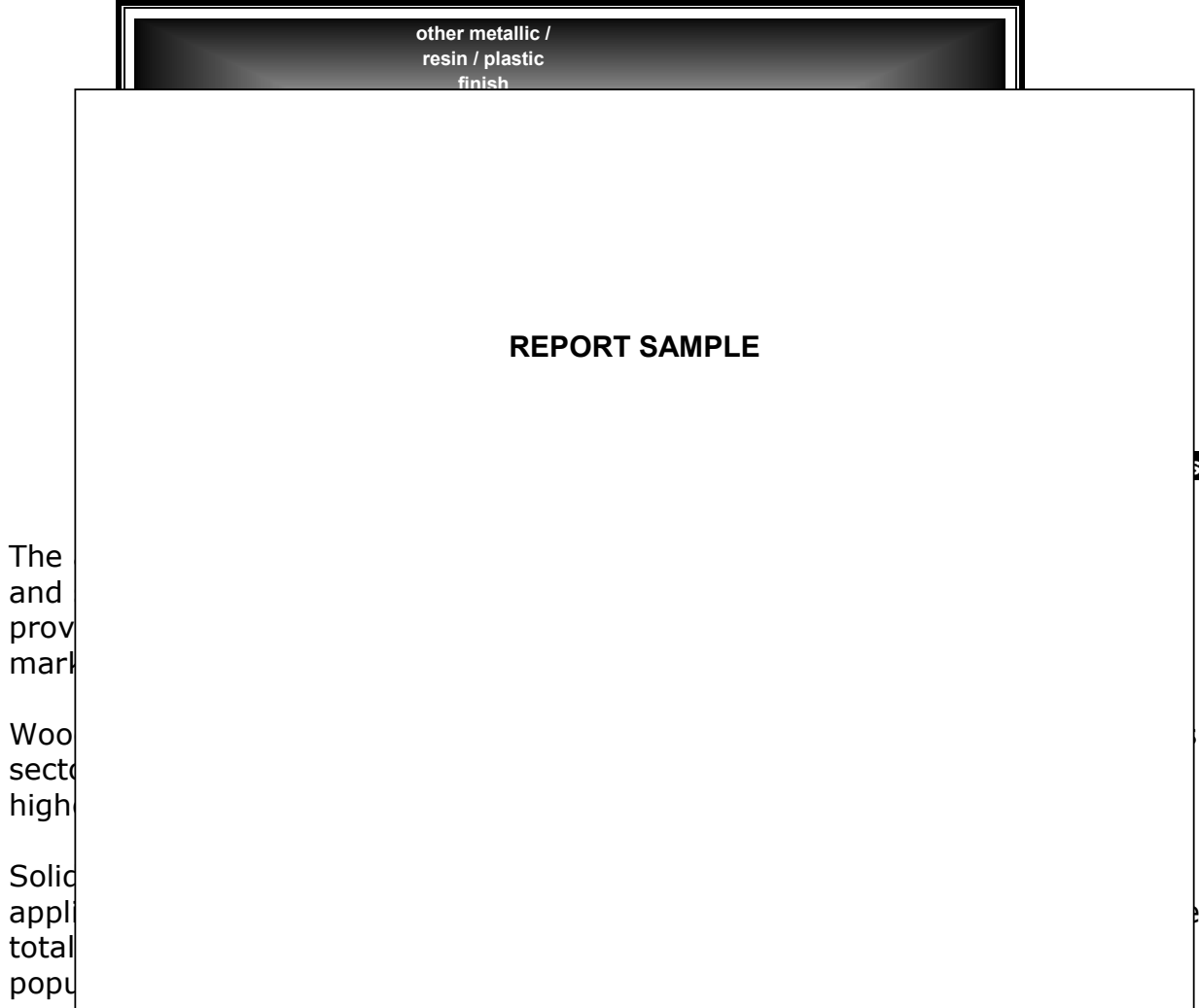
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3.4 Bedroom Furniture Share by Material & Finish 2010

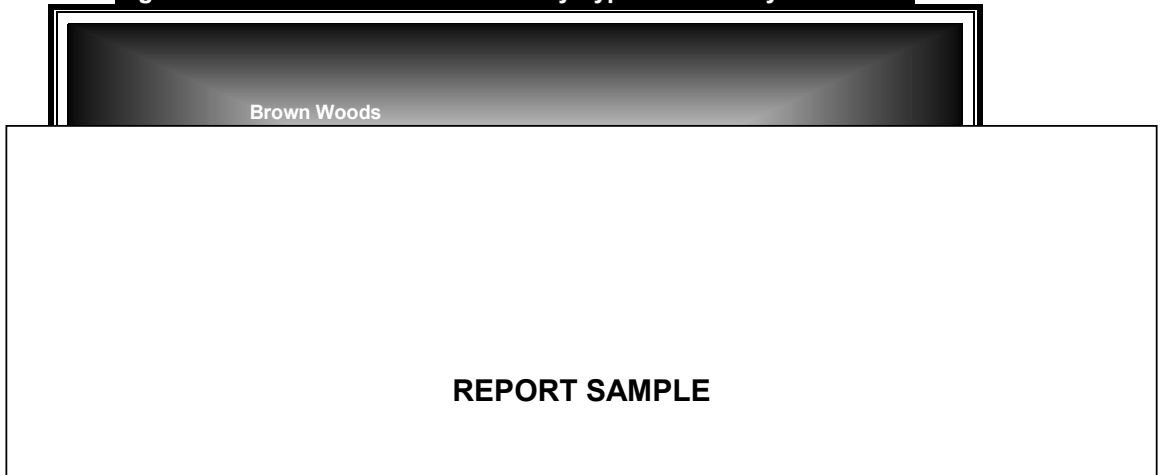
The bedroom furniture sector is composed of a number of products consisting of a wide range of materials. However, in terms of finish, there are a few key materials which are generally used, as indicated below:-

Figure 23: Bedroom Furniture Mix by Material Finish by Value 2010



The solid wood sector can be further segmented into types of wood used, with share estimates for the key sectors provided below:-

Figure 24 Bedroom Furniture Share by Type of Wood by Value 2007



Source: MTW Research / Trade Estimates

Whilst the above are estimates and should therefore be regarded with a degree of caution, the chart does illustrate that light coloured woods remain popular in the market, though higher value brown woods such as mahogany, oak and teak account for around xx% of the wooden bedroom furniture sector in 2010.

The types of wood illustrated above are classified in the following table:-

Figure 25: Wood Classifications – Wood Types by Light, Red, Brown & Dark Woods

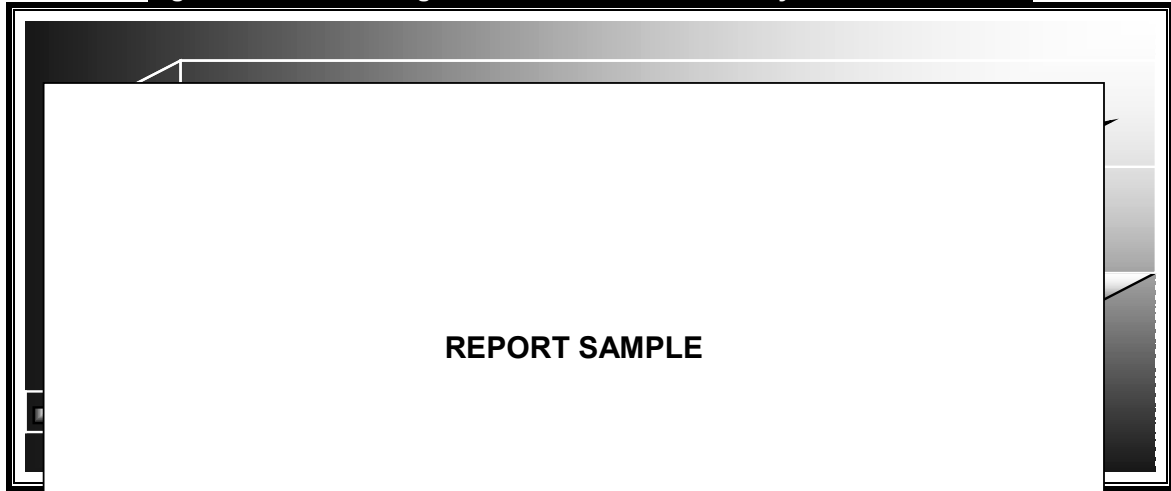
Light Woods	Red Woods	Brown Woods	Dark Woods
Ailanthus	Birch	Beech	Benge
Anigre	Bubinga	Benin	Cocobolo
Ash	Cedar	Coconut	Mahogany
Ash, Quilted	Cherry	Elm –Burl	Purpleheart
Aspen	Laurel	Kelobra	Rosewood,
Avoidire	Luaun	Koa	Indian Walnut,
Birch	Makore	Lacewood	Black Walnut,
Birch (Masur)	Mahogany	Limba	Claro Walnut,
Butternut	Mahogany-Cuban	Lignum Vitae	FrenchWenge
Elm	Mahogany-Fiddleback	Locust	
Elm, ChineseElm,	Mahogany-Striped	Mahogany	
Grey	Narra	Mesquite	
Holly	Red Oak	Monkeypod	
Kelala	Padauk	Myrtlewood Burl	
Kentucky	Red Gum	Nutmeg	
Coffeetree	Robusta	Oak-White, Oak-Red Crotch	
Maple	Rosewood-Honduras	Oak English Brown	
Maple, Birdseye		Oak-White Rift	
Maple, Curly		Oak-W/Quartersawn	
Mulberry		Ocle	
Ramin		Paldao	
Pearwood		Pecan	
Poplar, Poplar Burl		Persimmon, Sapele	
Poplar, Spalted		Sassafras, Teak	
Satinwood		Zebrawood	

Source: MTW Research / Trade Estimates

3.5 Wardrobes Market 2004-2014

The following chart illustrates the performance of the domestic wardrobes market by value since 2004 and forecasts to 2014:-

Figure 26: Freestanding & Fitted Wardrobes Market by Value 2004-2014 £M



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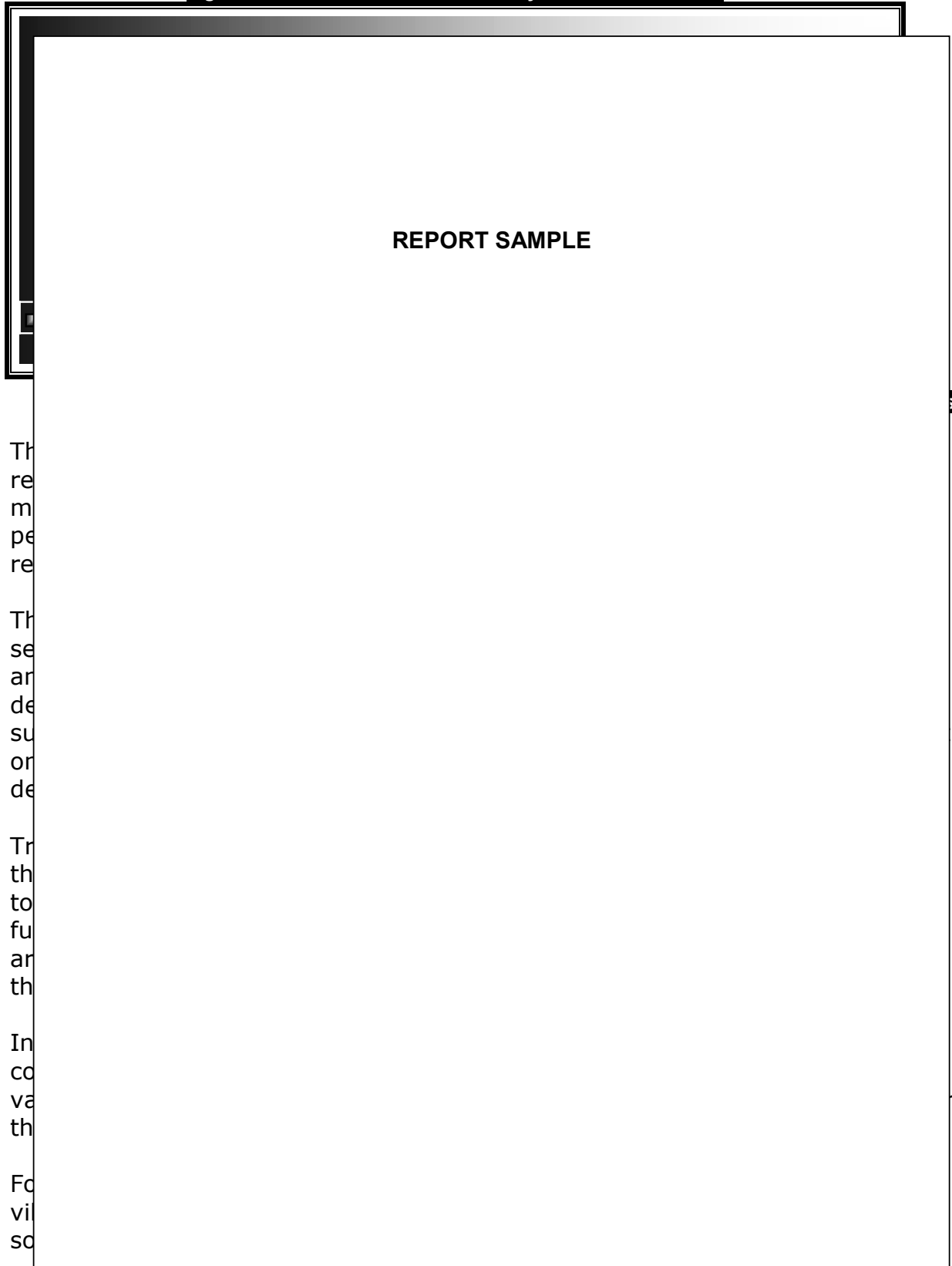
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3.3 Bedroom Drawer Chests Market 2004 – 2014

The following chart illustrates the performance of the domestic bedroom drawer chests market by value since 2004 and forecasts to 2014:-

Figure 27: Chest of Drawers Market by Value 2004-2014 £M



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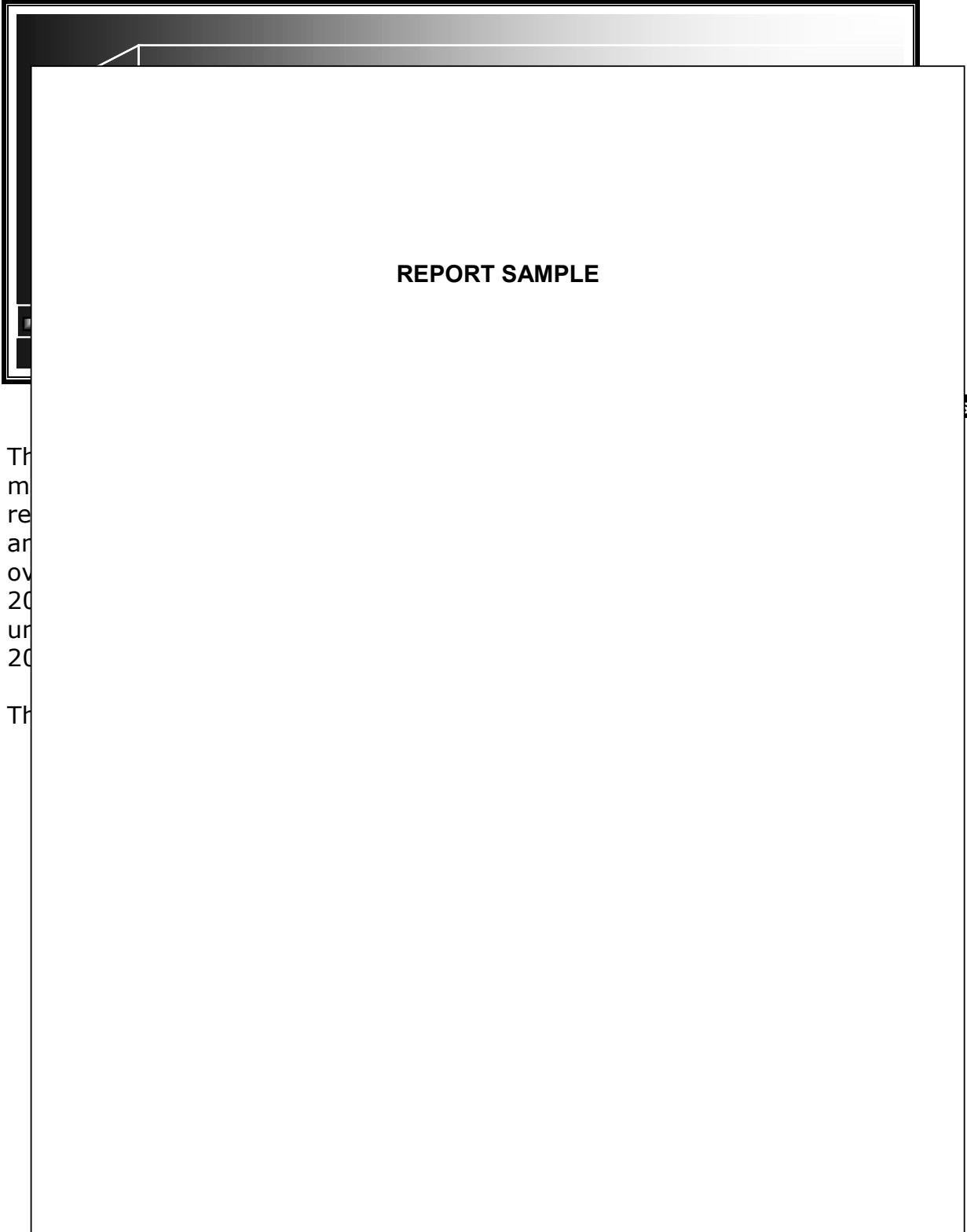
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3.6 Childrens Bedroom Furniture Market 2004 – 2014

3.6.1 Childrens Bedroom Furniture Market Trends

The following chart illustrates the performance of the UK childrens bedroom furniture market by value since 2004 and forecasts to 2014:-

Figure 30: Childrens Bedroom Furniture Market by Value 2004-2014 £M



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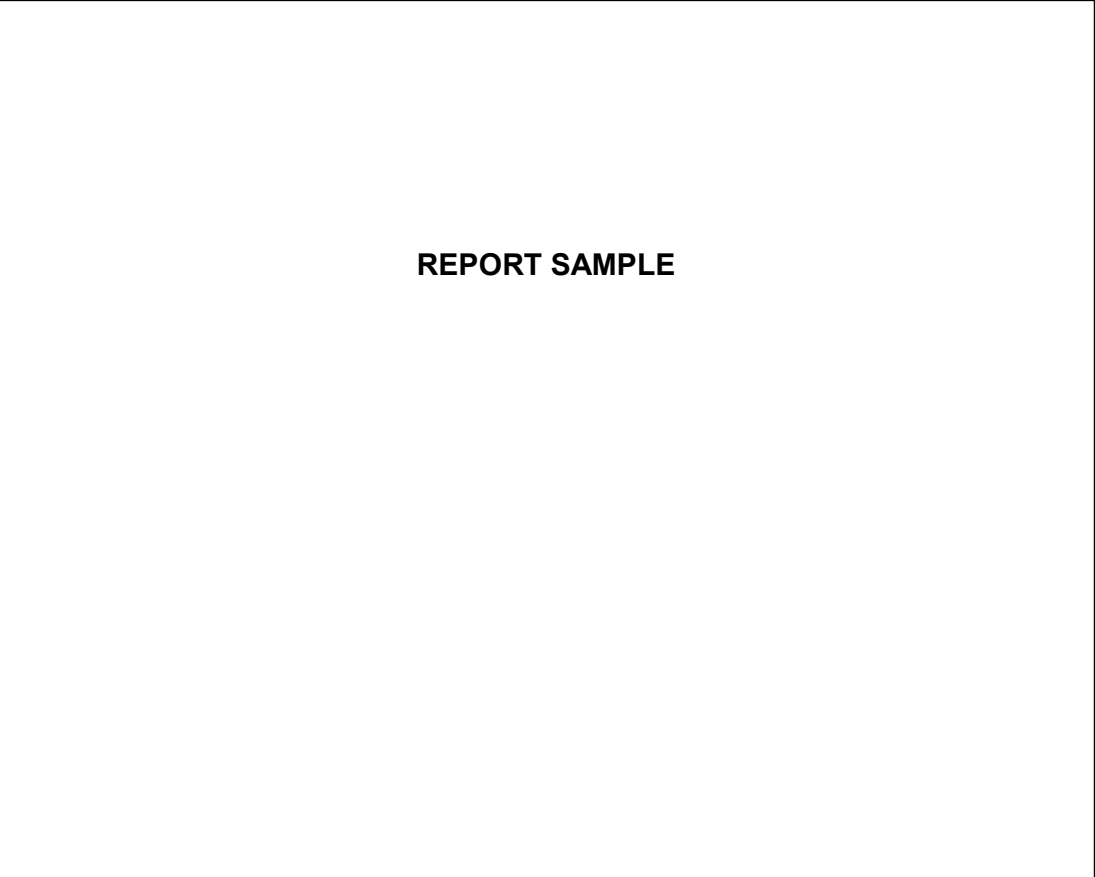
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3.6.2 Key Specification Criteria for Childrens Bedroom Furniture

Products in the childrens furniture sector need to be aimed at two differing types of consumer – the end user (ie the child) and the purchaser (the parent). Given that the decision making process for these two separate types of consumer are clearly quite different, the key specification criteria also vary substantially, as illustrated below:-

Figure 31: Childrens Furniture Key Specification Criteria – For Children & Adults

Child (end user)	Adult (purchaser/customer)
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4. BEDROOM FURNITURE MANUFACTURER PROFILES

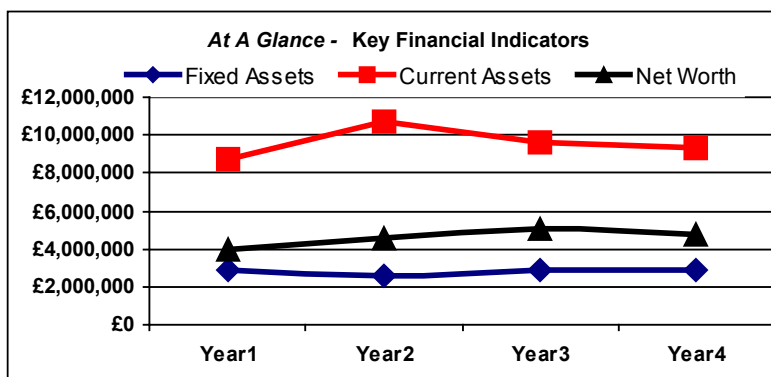
The following section identifies some of the key UK manufacturers & importers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

4.1 Bedroom Furniture Manufacturers Profiles & KPIs

Sample Ltd - Company Overview & 'At a Glance'

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Sample Park
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Sample
Tel: Sample Sample

Sample Ltd is a Private limited with share capital company, incorporated on July 12, 1946. The company's main activities are recorded by Companies House as "The manufacture and distribution of kitchen and bedroom furniture and associated products.". In early 2010, the company has an estimated 180-190 employees.



To year end December 2009, Sample Ltd is estimated to have achieved a turnover of around £30 million. Pre-tax profit for the same period is estimated at around £1.26 million. The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	The manufacture and distribution of kitchen and bedroom furniture and associated products.
Parent Company	N/A
Ultimate Holding Company	N/A
Estimated Number of Employees	180-190
Senior Decision Maker / Director	Sample Sample

Sample Ltd - 4 Year KPIs to Year End 30/09/2008

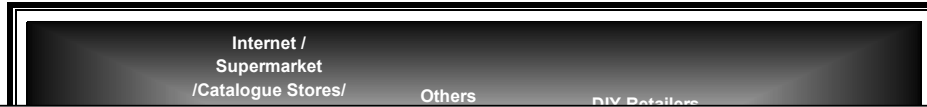
Key Indicator £	Year End 30/09/2005 (Year1)	Year End 30/09/2006 (Year2)	Year End 30/09/2007 (Year3)	Year End 30/09/2008 (Year4)
Fixed Assets	£2,902,000	£2,610,000	£2,846,000	£2,888,000
Current Assets	£8,702,000	£10,754,000	£9,652,000	£9,292,000
Current Liabilities	£7,424,000	£8,738,000	£7,313,000	£7,413,000
Long Term Liabilities	£212,000	£92,000	£93,000	£54,000
Net Worth	£3,968,000	£4,534,000	£5,092,000	£4,713,000
Working Capital	£1,278,000	£2,016,000	£2,339,000	£1,879,000
Profit per Employee	£-1,409	£3,973	£3,787	£-2,359
Sales per Employee	£171,601	£197,870	£203,989	£179,392

5. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Distribution Channel 2010, 2004 & 2014

The share accounted for by each of the key distribution channels within the UK bedroom furniture market in 2010 is illustrated in the following chart:-

Figure 94: Share by Distribution Channel for Bedroom Furniture Market 2010



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In order to provide a historical context, the 2004 share for each of the key channels illustrated in the following chart:-

Figure 95: Share by Distribution Channel for Bedroom Furniture Market 2004



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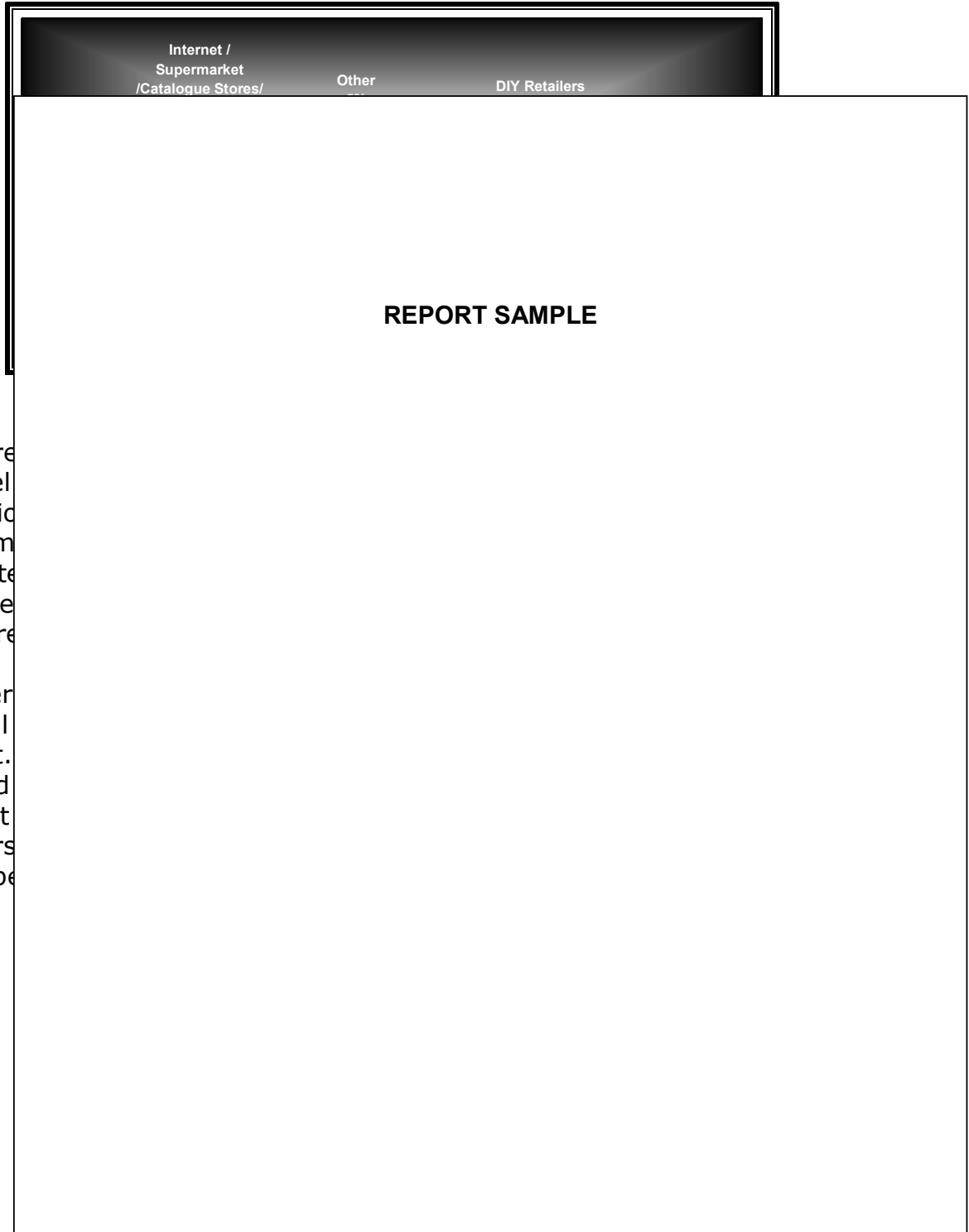
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Figure 96: Share by Distribution Channel for Bedroom Furniture Market 2014



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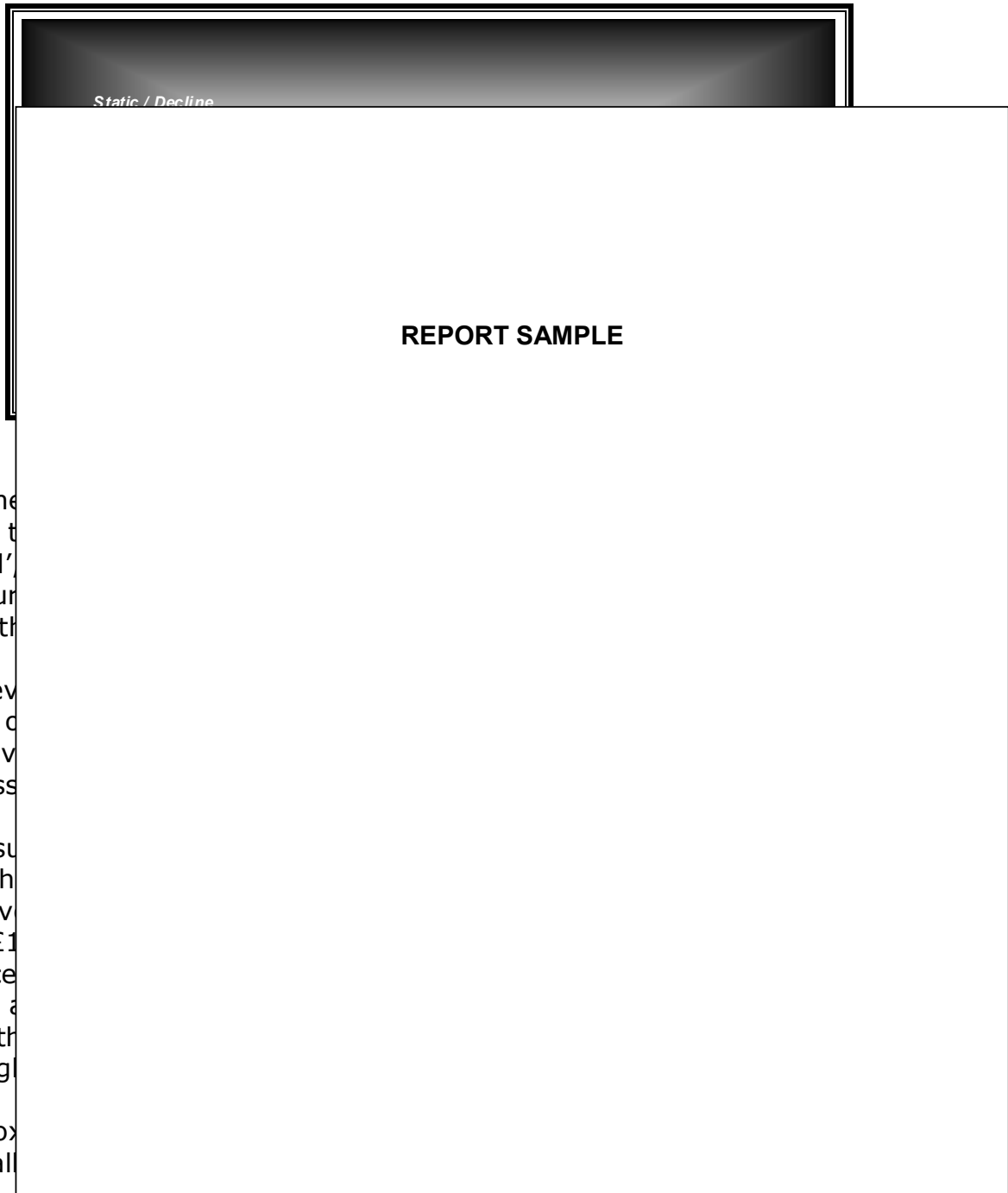
5.3 Furniture Retailers Market – Industry Structure

The following section reviews the UK furniture retail market in 2010 in terms of industry structure and provides key performance indicators for the largest channel of the UK bedroom furniture market.

3.1.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 97: Market Share by Furniture Retailer Sales Growth / Decline 2009



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this sector typically consisted of some larger companies, where even a small decline in revenue will have a fairly dramatic impact on the market.

3.1.2 Industry Share by Credit Rating in 2010

5.5 Furniture Retailers Industry Ranking & Turnover Estimates

5.5.1 Furniture Retailers Listing

The list below illustrates the key players active in the market at present:-

Figure 112: Furniture Retailers Company Listing

Alan Ward	Futon	Oldrid & Co. (Downtown)
And So To Bed	Gatenby	R & M Deluxe Holdings
Anderson House Furnishers	George Smith	Reid Furniture
Ardis Living	Glasswells World Of Furniture	Reid Furniture (Ireland)
Bannons	Graham & Green	Rolfe Carpets
Barker & Stonehouse	Habitat	Shackletons
Bart 221 (Cotswold)	Hafren Furnishers	Sharps Bedrooms
Beaumont Beds	Harding & Sons	Skandansk Design
Better Choice	Hatfields Furnishers	Smallbone (Mark Wilkinson)
Browns York	Heals & Sons	Sofa Workshop
C D S	High Seat Limited	Space Solutions
C S Lounge Suites	Highly Sprung	Steinhoff UK Retail
Camp Hopson Furniture Centre	Hilco UK	Sterling Furniture Group
Castlewarehouse	Hills Office Furniture	Stollers Furniture World
Clement Joscelyne	Homeform Group	Stone Dam Mills
Cloham	Hopewells Furnishers	Sturtions & Tappers Furniture
Cookes Furniture	House Of Holland	Take
Cousins Furniture Stores	Housing Units	Textiles Direct (Holdings)
Creations Interiors	Ikea	The Cotswold Co
Cw Barsley & Son	JH Haskins And Son	The Furniture Factory Shop
Delcor Furniture	Joysleep	The House Shop
Derryvale Furniture	Kingcome Sofas	The Sofa Workshop
Dunelm Group Plc	Kirkdale Mail Order	The Suite Superstore
Feather & Black	Lenleys Furnishers	Vale Upholstery
Fenwick (Bentalls)	Levines	Vasey W & Sons (Carlisle)
Fishpools	Lombok	Walmsley Furnishing
Forrest Furnishing	Maskreys	Wesley Barrell
Full Circle Future (DFS)	Montgomery Tomlinson	Whitfield & Lindsay
Fultons	Multiyork Furniture	WJ Aldiss
Furniture 123	Natuzzi Services	
Furniture Village	Oka Direct	

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

5.5.2 Furniture Retailers Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 113: Furniture Retailers Ranked By Turnover 2009

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