Dining, Living Room & Occasional Furniture Market
Research & Analysis UK 2010

REPORT SAMPLE

Dining, Living Room & Occasional Furniture Market Size & Review 2004-2009; SWOT & PEST Analysis, Product Mix 2004-2013; Channel Mix 2004-2013; Market Leaders, Retailers' Profiles & Key Financials; Market Forecasts to 2013

January 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.

Companies Included

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. 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 & 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 DINING, LIVING & OCCASIONAL FURNITURE MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Dining, Living Room & Occasional Furniture Market comprises of a wide range of products suitable for a variety of applications within a domestic environment. Specifically, this report reviews the UK domestic market between 2004 and 2010 with forecasts to 2013 for:-

- **Dining Tables** – wooden, metal, stone & other materials
- **Dining Chairs** – of all materials & styles
- **Display Units, Dressers & Sideboards**
- **Shelf Units, Bookcases & Shelving**
- **Coffee, Console & Lamp Tables**
- **TV & Hi-Fi Entertainment Units**
- **Bar Tables & Bar Stools** – used in Kitchens, diners, utility rooms etc

The UK dining, living & occasional furniture market is estimated to be worth just over £xxx million at retail selling prices in 2010, reflecting a market now entering a tentative growth phase following difficult trading conditions during the last 2 y

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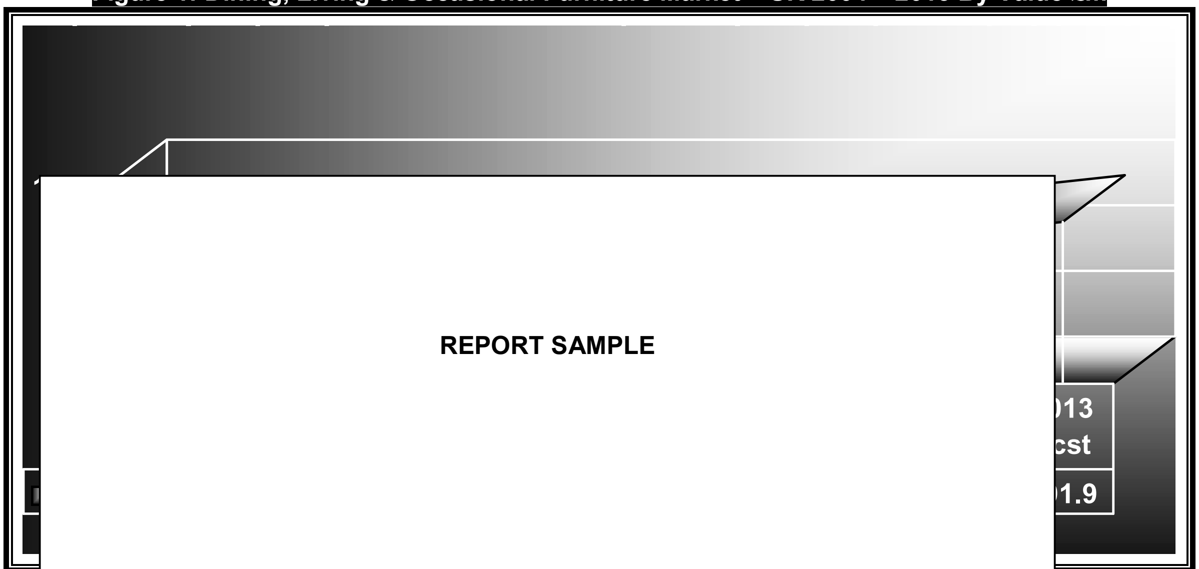
2.2 DINING, LIVING & OCCASIONAL FURNITURE MARKET SIZE & TRENDS 2004-2013

2.2.1 Dining, Living & Occasional Furniture Market Size 2004-2013 – Current Prices

The UK Dining, Living & Occasional Furniture market encompasses a wide range of products and is estimated to be worth just under £xxx million in 2010 as illustrated in the following chart:-

Figure 1: Dining, Living & Occasional Furniture Market – UK 2004 – 2013 By Value £m



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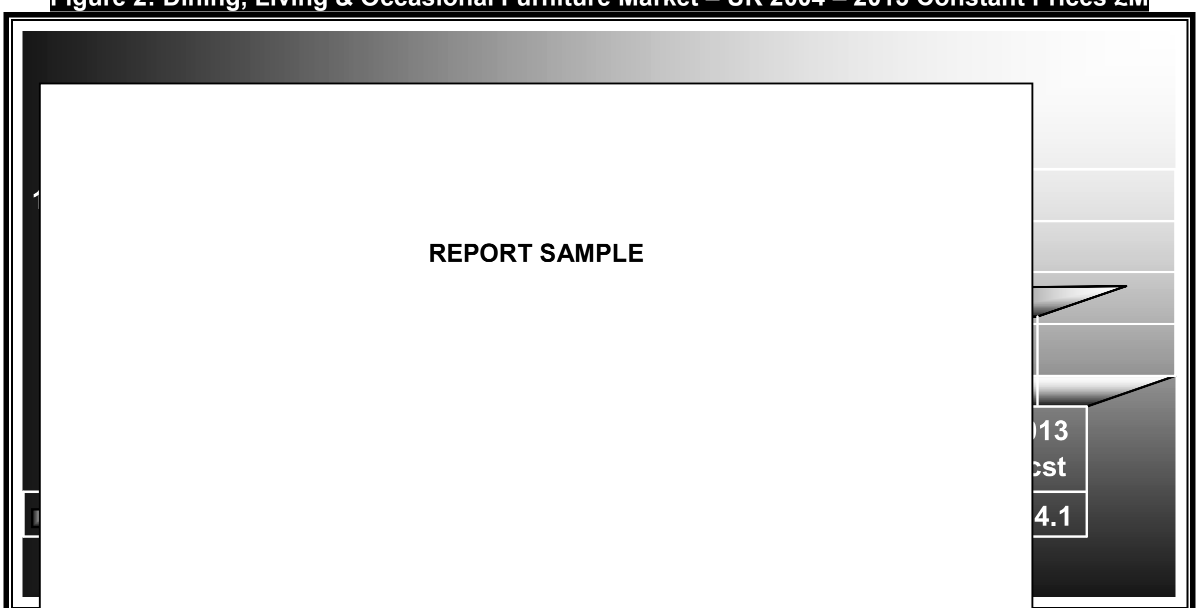
2.2.2 Dining, Living & Occasional Furniture Market Size 2004-2013 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2013:-

Figure 2: Dining, Living & Occasional Furniture Market – UK 2004 – 2013 Constant Prices £M



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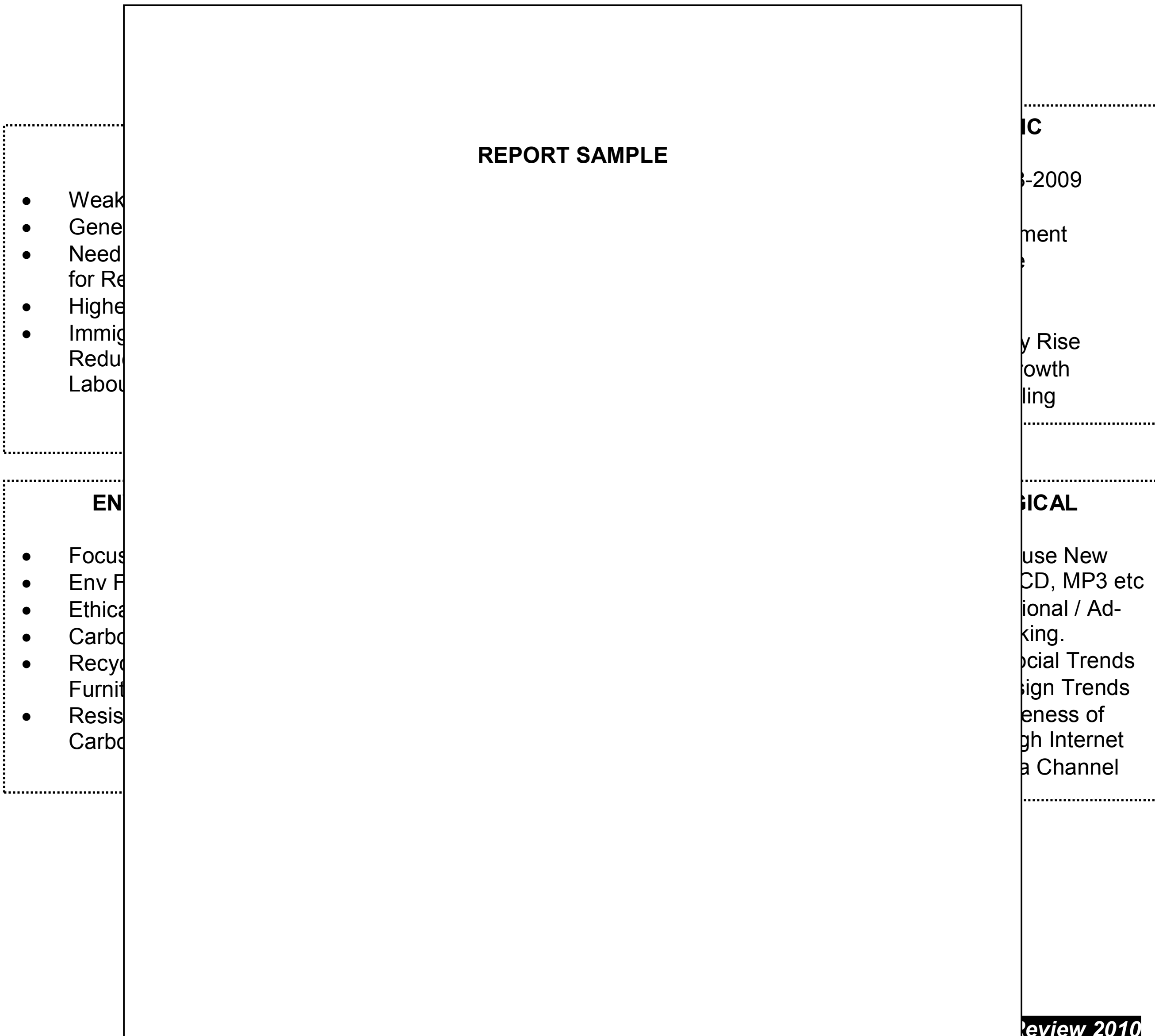
2.3 KEY MARKET TRENDS IN THE DINING, LIVING & OCCASIONAL FURNITURE MARKET

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 Dining, Living & Occasional 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 3: PEST Analysis for UK Dining, Living & Occasional Furniture Market in 2009



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2.3.2 Political & Legal Influences & Trends

The current UK political landscape is presently determined by the results of the last general election which was held in early May 2005. The Labour party was returned in 355 seats,

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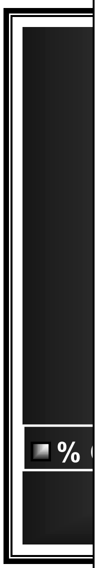

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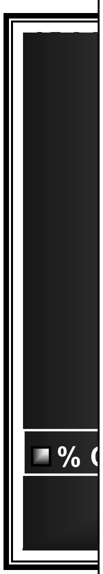

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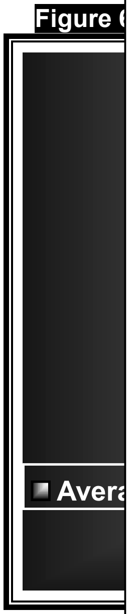

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2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the Dining, Living & Occasional Furniture market, the following table identifies some of the key strengths & weaknesses evident in the UK Dining, Living & Occasional Furniture market at present:-

Figure 8: Key Strengths & Weaknesses in the Dining, Living & Occasional Furniture Market 2009-2013

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Source: MTW Research Strategic Review 2010

The following table identifies some of the key opportunities and threats evident in the market at present:-

Figure 9: Key Opportunites & Threats in the Dining, Living & Occasional Furniture Market 2009-2013

OPPORTUNITIES	THREATS

REPORT SAMPLE

Source: MTW Research Strategic Review 2010

2.5 IMPORTS & EXPORTS OF FURNITURE 2004-2013

The following chart illustrates the level of imports of wooden dining and living room furniture since 2004 and forecasts to 2013 in value terms:-

Figure 10: Imports of Living & Dining Room Furniture By Value 2004-2013 £M

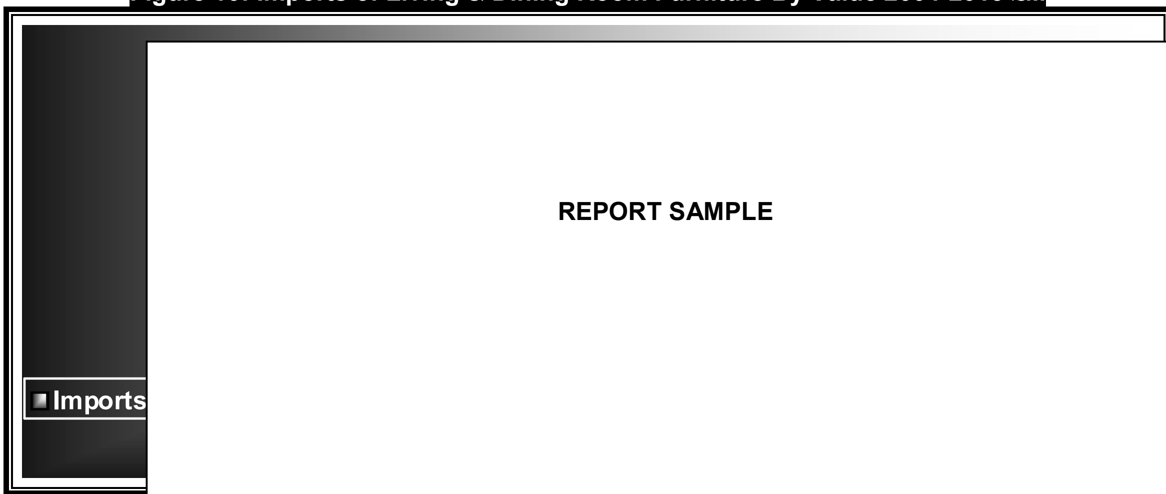

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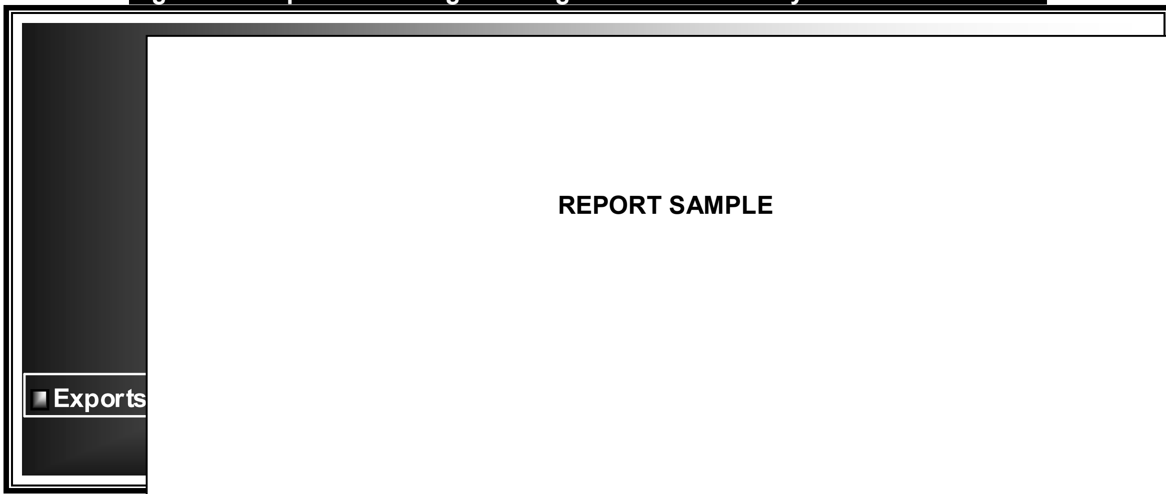
Figure 11: Exports of Living & Dining Room Furniture By Value 2004-2013 £M



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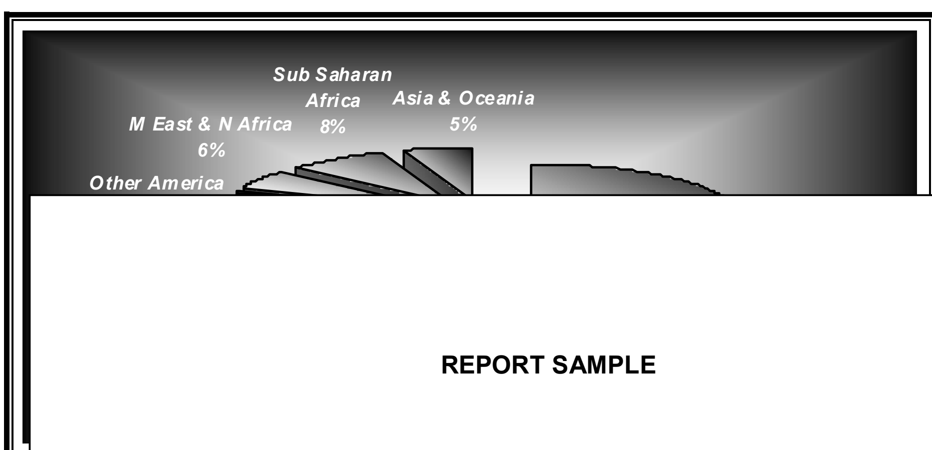
The following chart illustrates the share by key target countries for dining and living room furniture exports in 2010:-

Figure 12: Share by Key Export Country for Dining & Living Room Furniture 2009



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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 dining, living and occasional furniture market in 2010 is illustrated in the following chart:-

Figure 13: Share by Product in Dining, Living & Occasional Furniture Market 2010

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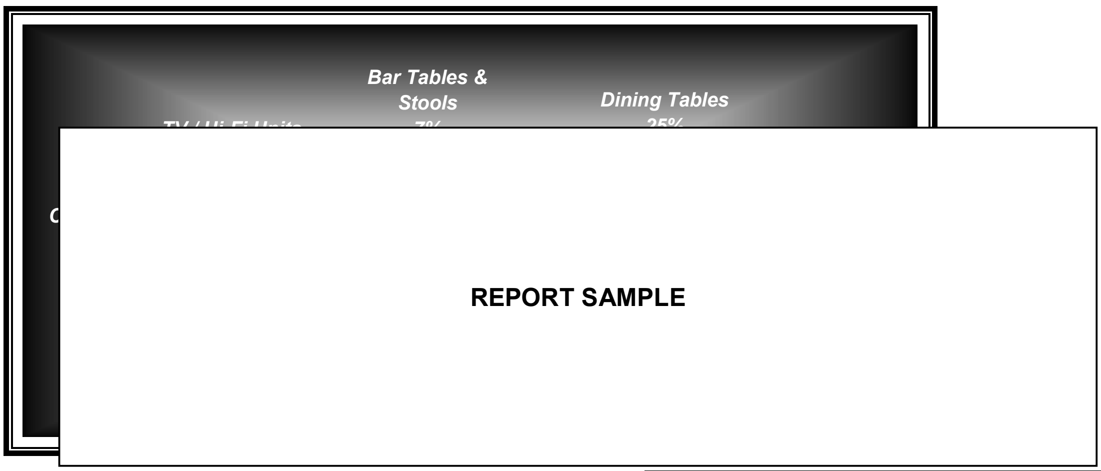
In order to illustrate historical trends, the following chart illustrates the share by key product sector in 2004:-

Figure 14: Share by Product in Dining, Living & Occasional Furniture Market 2004



Source: MTW Research / Trade Sources

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The following chart illustrates the forecast share for each key product sector within the dining, living and occasional furniture market in 2013:-

Figure 15: Forecast Share by Product in Dining, Living & Occasional Furniture Market 2013

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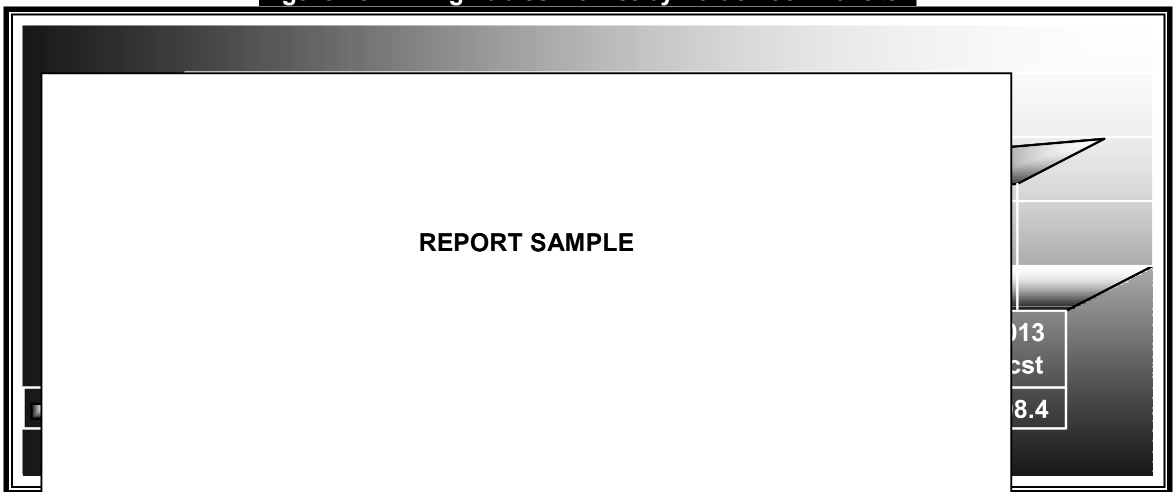
3.2 Dining Tables Market 2004-2013

The following chart illustrates the performance of the domestic dining tables market by value since 2004 and forecasts to 2013:-

Figure 16: Dining Tables Market by Value 2004-2013 £M



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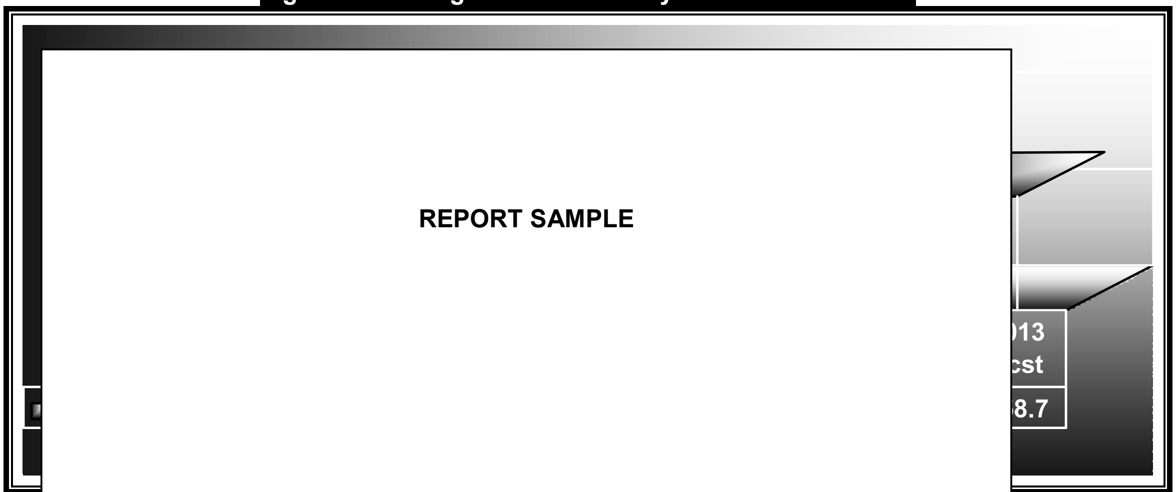
3.3 Dining Chairs Market 2004 – 2013

The following chart illustrates the performance of the domestic dining chairs market by value since 2004 and forecasts to 2013:-

Figure 17: Dining Chairs Market by Value 2004-2013 £M



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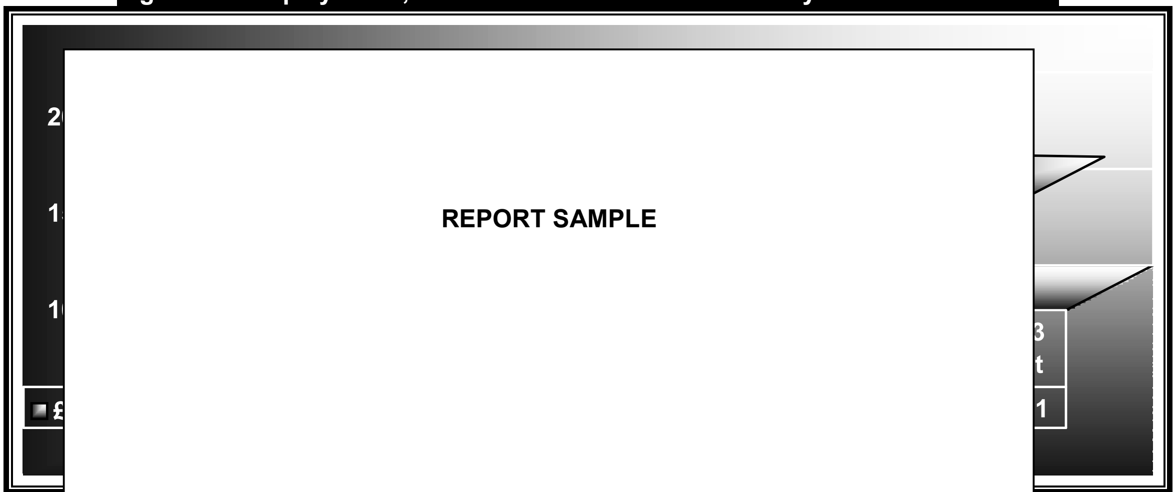
3.4 Display Units, Dressers & Sideboards Market 2004-2013

The following chart illustrates the performance of the display units, dressers and sideboards market by value since 2004 and forecasts to 2013:-

Figure 18: Display Units, Dressers & Sideboards Market by Value 2004-2013 £M



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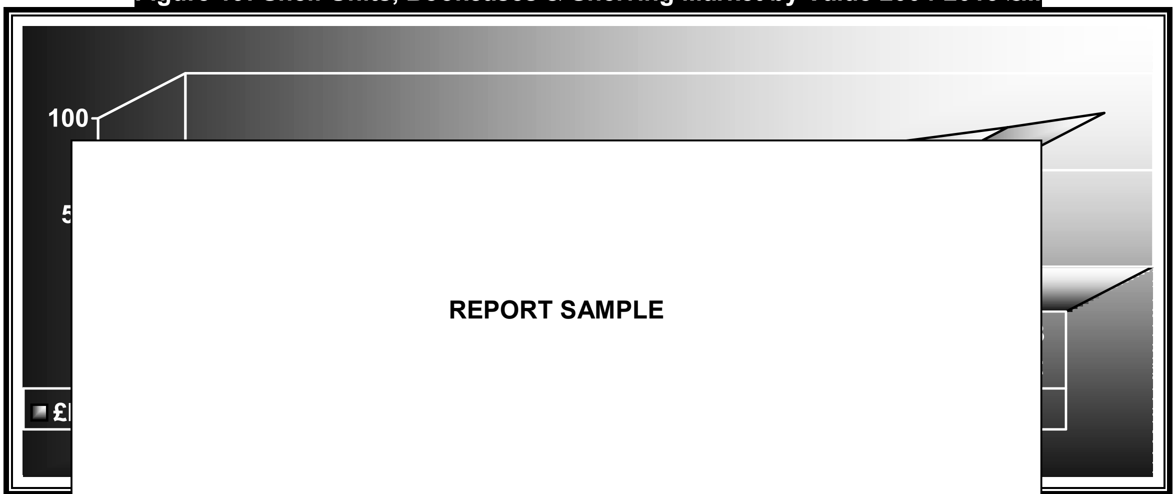
3.5 Shelf Units, CD/DVD Racks, Bookcases / Shelving Market 2004-2013

The following chart illustrates the performance of the shelf units, bookcases and shelving market by value since 2004 and forecasts to 2013:-

Figure 19: Shelf Units, Bookcases & Shelving Market by Value 2004-2013 £M



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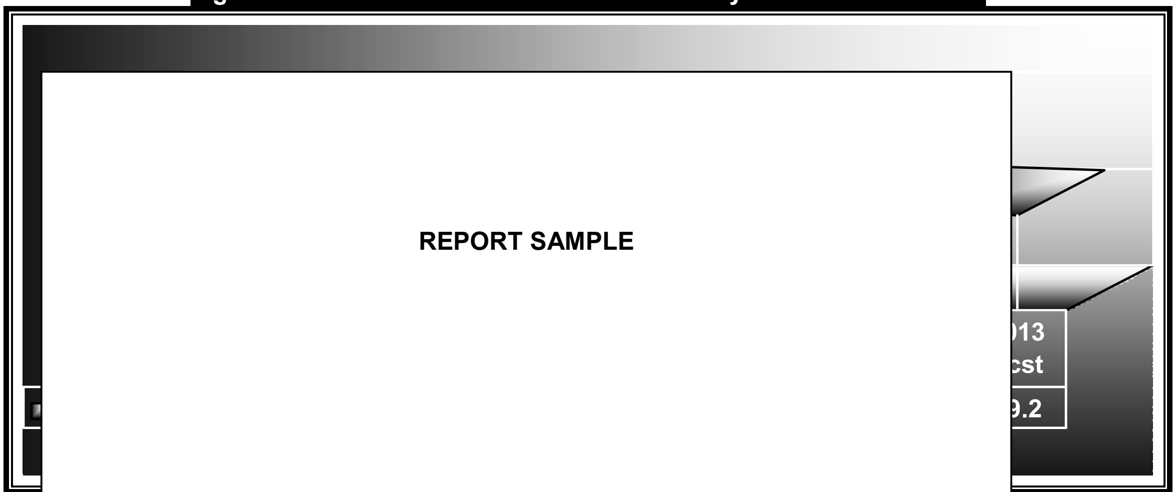
3.6 TV, HI-FI & Entertainment Units Market 2004 – 2013

The following chart illustrates the performance of the TV & Hi-Fi unit market by value since 2004 and forecasts to 2013:-

Figure 20: TV. Hi-Fi & Entertainment Market by Value 2004-2013 £M



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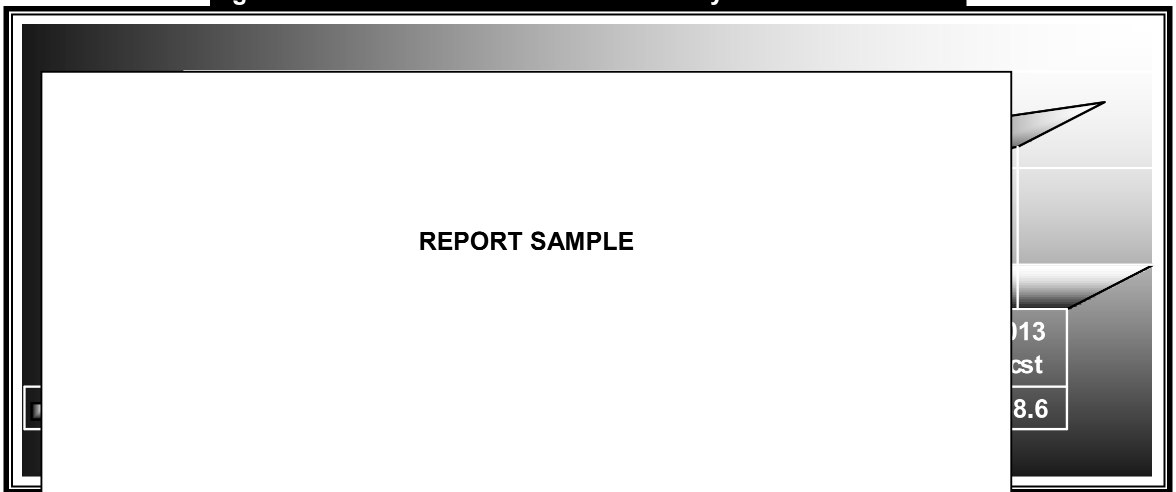
3.7 Bar Tables & Stools Market 2004 - 2013

The following chart illustrates the performance of the bars and stools market by value since 2004 and forecasts to 2013:-

Figure 21: Bar Tables and Stools Market by Value 2004-2013 £M



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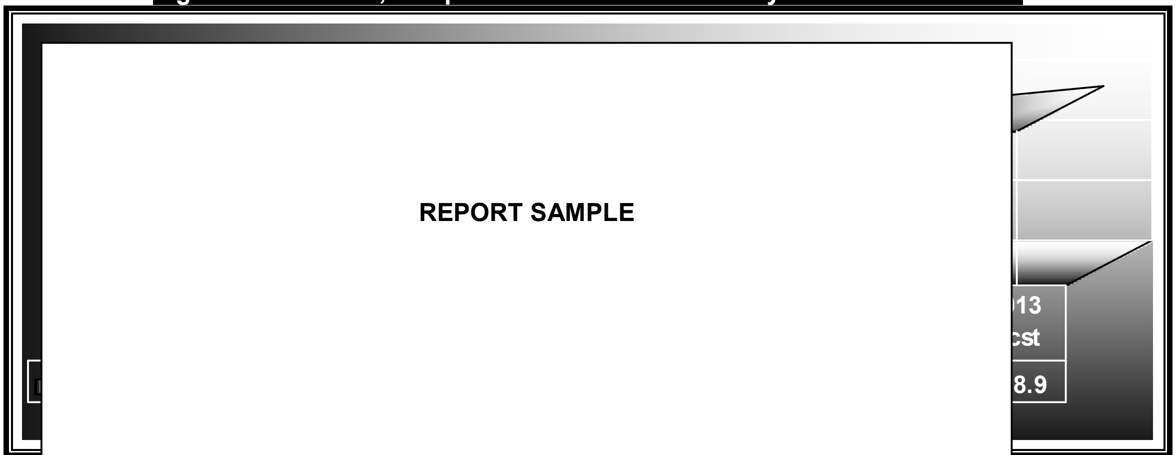
3.8 Console, Lamp & Coffee Tables Market 2004-2013

The following chart illustrates the performance of the Console, Lamp & Coffee Tables market by value since 2004 and forecasts to 2013:-

Figure 22: Console, Lamp & Coffee Tables Market by Value 2004-2013 £M



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4. FURNITURE MANUFACTURER PROFILES

The following section identifies some of the key UK manufacturers 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 Furniture Manufacturers Profiles & KPIs

Sample Ltd - Company Overview & *'At a Glance'*

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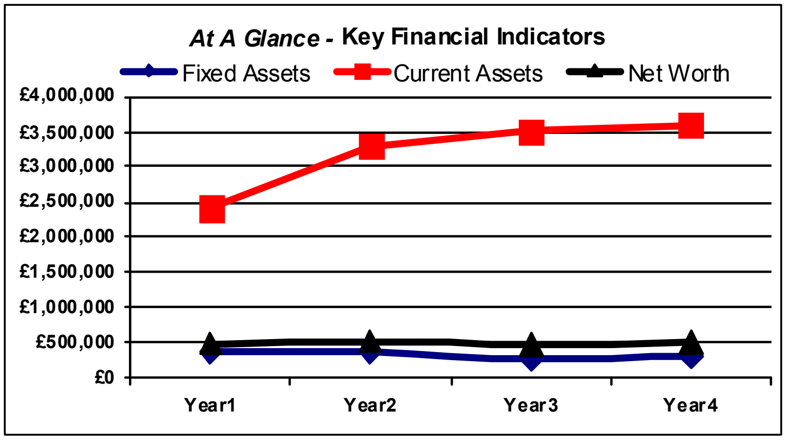
Sample Address
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on 18 July 1973. The company's main activities are recorded by Companies House as "The manufacture and wholesale of furniture." In early 2010, the company has an estimated 129 employees.

To year end 31/07/2008, Sample Ltd is estimated to have achieved a turnover of around £11 million. Pre-tax profit for the same period is estimated at around £30,000.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	The manufacture and wholesale of furniture.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	129
Senior Decision Maker / Director	Sample Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Figure 27: Sample Ltd - 4 Year KPIs to Year End 31/07/2008

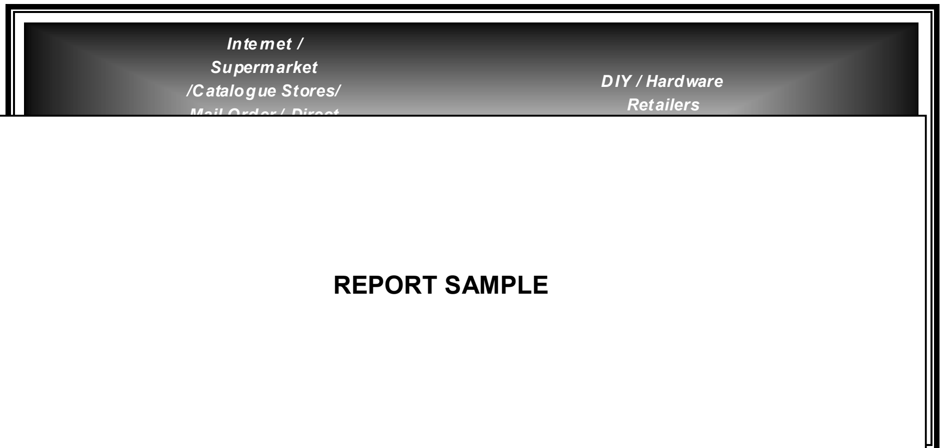
Key Indicator £	Year End 31/07/2005 (Year1)	Year End 31/07/2006 (Year2)	Year End 31/07/2007 (Year3)	Year End 31/07/2008 (Year4)
Fixed Assets	£370,000	£355,000	£264,000	£318,000
Current Assets	£2,406,000	£3,287,000	£3,507,000	£3,599,000
Current Liabilities	£1,748,000	£2,556,000	£2,757,000	£2,963,000
Long Term Liabilities	£543,000	£561,000	£534,000	£458,000
Net Worth	£485,000	£525,000	£480,000	£496,000
Working Capital	£658,000	£731,000	£750,000	£636,000
Profit per Employee	-£1,868	£217	£2,102	£233
Sales per Employee	n/a	n/a	n/a	n/a

5. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Distribution Channel 2010, 2004 & 2013

The share accounted for by each of the key distribution channels within the UK dining, living and occasional furniture market in 2010 is illustrated in the following chart:-

Figure 53: Share by Distribution Channel for Dining, Living & Occasional 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 54: Share by Distribution Channel for Dining, Living & Occasional Furniture Market 2004

REPORT SAMPLE

/ Trade Sources

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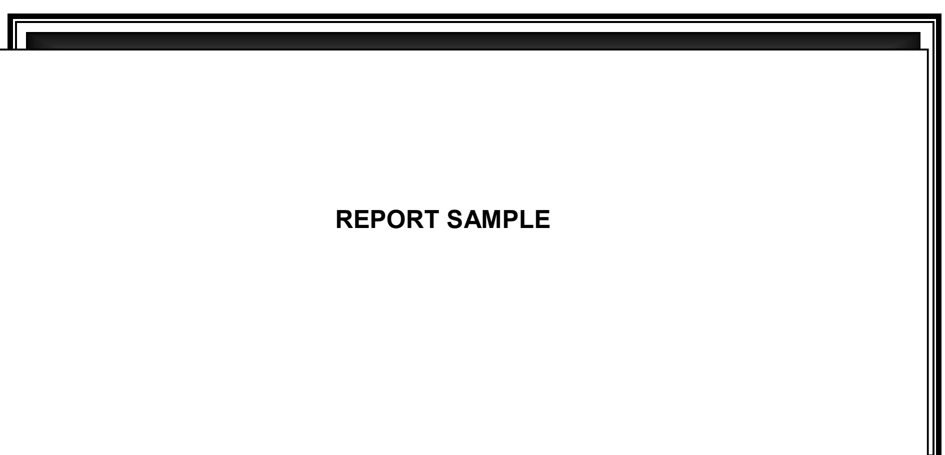
In terms of future prospects, the following chart illustrates the forecast share for each key channel in 2013:-

Figure 55: Share by Distribution Channel for Dining, Living & Occasional Furniture Market 2013



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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 dining, living and occasional 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:-

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the …

5.4 Key Market Trends in the Furniture Retailers Industry 2004-2013

The following section reviews some of the key trends in terms of financial performance of the UK Furniture Retail market since 2004, and forecasts to 2013.

5.4.1Furniture Retail Market Profitability 2004-2013

The following table illustrates the performance of the Furniture Retail market in terms of profitability between 2004 and 2009 and provides forecasts to 2013:-

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5.4.2 Furniture Retail Industry Assets 2004-2013

The following table illustrates the Furniture Retail market in terms of current and fixed assets between 2004 and 2009 and forecasts to 2013:-

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 71: Furniture Retailers Company Listing

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

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 72: Furniture Retailers Ranked By Turnover 2009

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47.

REPORT SAMPLE

Source: MTW Research / Company Accounts

5.5.3 Furniture Retailer Turnover Estimates 2009

The following table illustrates the estimated turnover for each company for 2009:-

Figure 73: Furniture Retailer Sales Estimates 2009 £M

REPORT SAMPLE

Trading Name	Turnover 2009	Trading Name	Turnover 2009
I			10.0
F			10.0
S			10.0
D			10.0
F			9.0
C			9.0
H			8.0
F			8.0
H			8.0
F			8.0
E			8.0
S			7.0
T			7.0
S			6.5
M			6.5
C			6.0
C			6.0
W			6.0
H			6.0
F			6.0
S			5.5
T			5.0
M			5.0
F			5.0
H			5.0
C			4.0
C			4.0
T			4.0
J			3.5
W			3.5
F			3.5
L			3.0
C			3.0
T			3.0
C			3.0
S			2.8
T			2.0
A			2.0
E			2.0
A			1.5
N			0.8
S			0.4
C			0.3
C			0.3
F			0.2
			0.1

Source: MTW Research / Company Accounts

5.5.4 Furniture Retailers Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the furniture retailers in 2009:-

Figure 74: Furniture Retailers Ranked By Profit 2009

REPORT SAMPLE

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5.5.5 Furniture Retailers Ranking by Assets

The following table illustrates our estimates of the rank by total fixed and current assets for each company in 2009:-

Figure 75: Furniture Retailers Ranked By Assets 2009

REPORT SAMPLE

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ishers

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5.5.6 Furniture Retailers Ranking by Debt

The following table illustrates the rankings by total debt for each company in 2009:-

Figure 76: Furniture Retailers Ranked By Debt 2009

REPORT SAMPLE

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47.Browns York

5.5.7 Furniture Retailers Ranking by Net Worth

The following table illustrates the ranking for each company by net worth in 2009:-

Figure 77: Furniture Retailers Ranked By Net Worth 2009

REPORT SAMPLE

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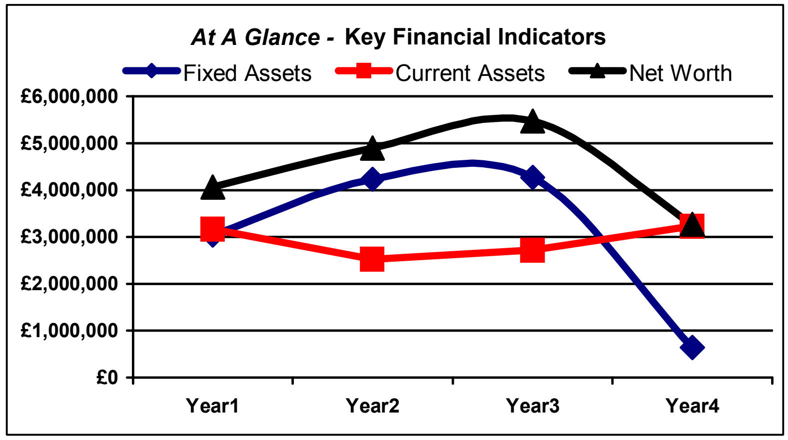
Source: MTW Research / Company Accounts

5.6 Furniture Retailers Profiles, KPIs & 'At a Glance'T

The following chapter illustrates the key financial indicators for the key players active in the UK FM industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description of activities, estimate of number of employees and contact details.

Sample Ltd - Company Overview & *'At a Glance'*

Sample Street
Sample Address
Sample Postcode
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on February 26, 1951. The company's main activities are recorded by Companies House as "Retail trading and the provision of financial services." In early 2010, the company has an estimated 70 employees.

To year end 28/01/2009, Sample Ltd is estimated to have achieved a turnover of around £13.0 million. Pre-tax profit for the same period is estimated at around £0.50 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Retail trading and the provision of financial services.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	70
Senior Decision Maker / Director	T Sample

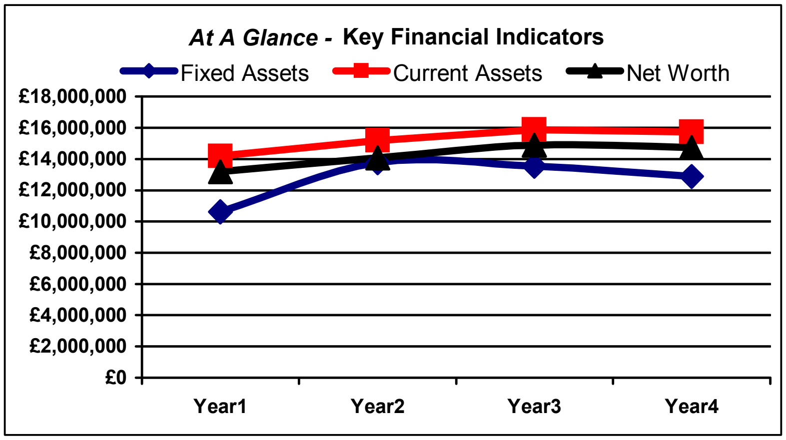
The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 28/01/2009

Key Indicator £	Year End 25/01/2006 (Year1)	Year End 31/01/2007 (Year2)	Year End 30/01/2008 (Year3)	Year End 28/01/2009 (Year4)
Fixed Assets	£3,039,000	£4,232,000	£4,271,000	£646,000
Current Assets	£3,164,000	£2,523,000	£2,713,000	£3,232,000
Current Liabilities	£1,005,000	£1,264,000	£842,000	£542,000
Long Term Liabilities	£1,128,000	£589,000	£666,000	£69,000
Net Worth	£4,070,000	£4,902,000	£5,476,000	£3,267,000
Working Capital	£2,159,000	£1,259,000	£1,871,000	£2,690,000
Profit per Employee	£5,846	£9,072	£10,574	£7,246
Sales per Employee	n/a	n/a	n/a	n/a

Sample Ltd - Company Overview & *'At a Glance'*

Sample Street
Sample Park
Sample
Sample
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on August 20, 1968. The company's main activities are recorded by Companies House as "A group engaged in the retail of furniture." In early 2010, the company has an estimated 370 employees.

To year end 31/03/2008, Sample Ltd is estimated to have achieved a turnover of around £60.0 million. Pre-tax profit for the same period is estimated at around £0.03 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	A group engaged in the retail of furniture.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	370
Senior Decision Maker / Director	Peter Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31/03/2008

Key Indicator £	Year End 31/03/2005 (Year1)	Year End 31/03/2006 (Year2)	Year End 31/03/2007 (Year3)	Year End 31/03/2008 (Year4)
Fixed Assets	£10,608,000	£13,766,000	£13,542,000	£12,895,000
Current Assets	£14,191,000	£15,178,000	£15,881,000	£15,745,000
Current Liabilities	£9,750,000	£10,915,000	£11,118,000	£10,728,000
Long Term Liabilities	£1,856,000	£3,960,000	£3,438,000	£3,162,000
Net Worth	£13,193,000	£14,069,000	£14,867,000	£14,750,000
Working Capital	£4,441,000	£4,263,000	£4,763,000	£5,017,000
Profit per Employee	£9,544	£4,493	£4,468	£92
Sales per Employee	£162,877	£151,752	£154,209	£152,862

Dining, Living Room & Occasional Furniture Market
Research & Analysis UK 2010

REPORT SAMPLE

Dining, Living Room & Occasional Furniture Market Size & Review 2004-2009; SWOT & PEST Analysis, Product Mix 2004-2013; Channel Mix 2004-2013; Market Leaders, Retailers' Profiles & Key Financials; Market Forecasts to 2013

January 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.

Companies Included

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. 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 & 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 DINING, LIVING & OCCASIONAL FURNITURE MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Dining, Living Room & Occasional Furniture Market comprises of a wide range of products suitable for a variety of applications within a domestic environment. Specifically, this report reviews the UK domestic market between 2004 and 2010 with forecasts to 2013 for:-

- **Dining Tables** – wooden, metal, stone & other materials
- **Dining Chairs** – of all materials & styles
- **Display Units, Dressers & Sideboards**
- **Shelf Units, Bookcases & Shelving**
- **Coffee, Console & Lamp Tables**
- **TV & Hi-Fi Entertainment Units**
- **Bar Tables & Bar Stools** – used in Kitchens, diners, utility rooms etc

The UK dining, living & occasional furniture market is estimated to be worth just over £xxx million at retail selling prices in 2010, reflecting a market now entering a tentative growth phase following difficult trading conditions during the last 2 y

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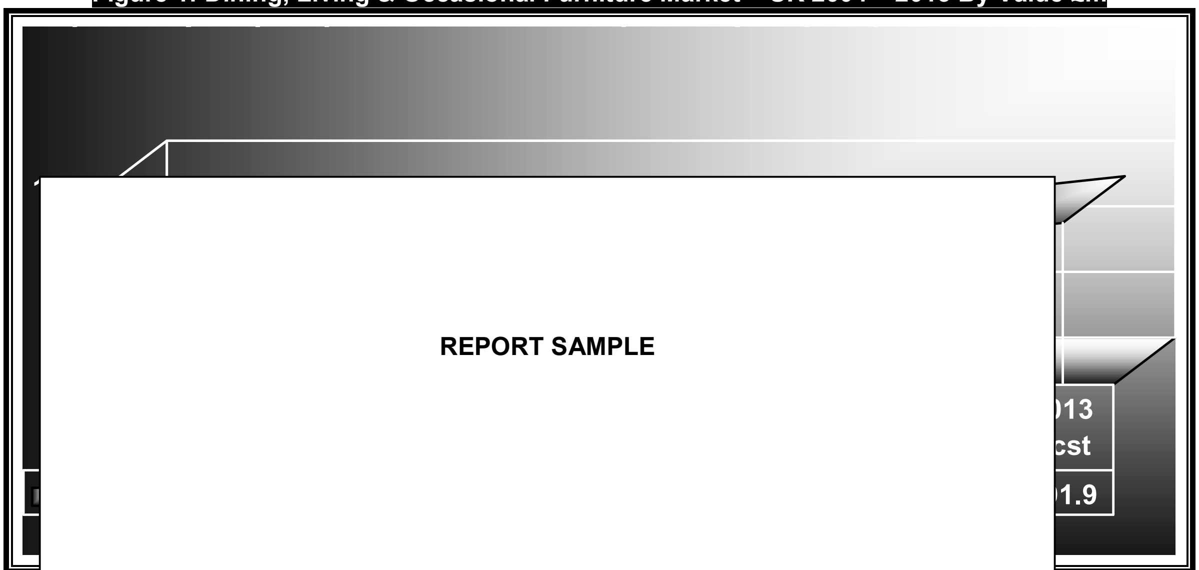
2.2 DINING, LIVING & OCCASIONAL FURNITURE MARKET SIZE & TRENDS 2004-2013

2.2.1 Dining, Living & Occasional Furniture Market Size 2004-2013 – Current Prices

The UK Dining, Living & Occasional Furniture market encompasses a wide range of products and is estimated to be worth just under £xxx million in 2010 as illustrated in the following chart:-

Figure 1: Dining, Living & Occasional Furniture Market – UK 2004 – 2013 By Value £m



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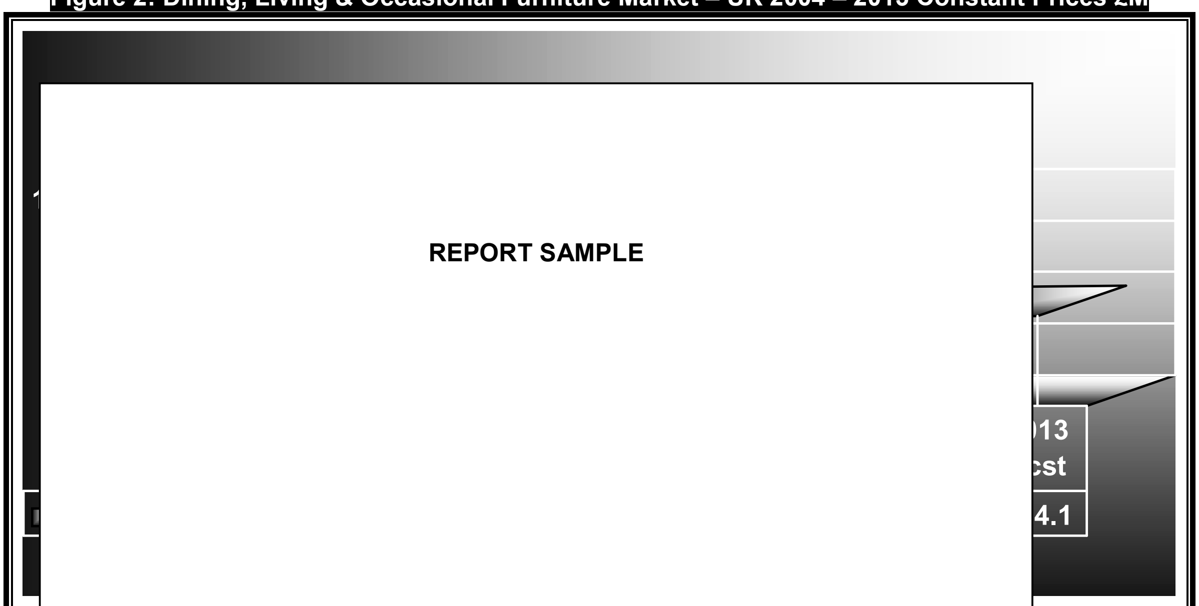
2.2.2 Dining, Living & Occasional Furniture Market Size 2004-2013 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2013:-

Figure 2: Dining, Living & Occasional Furniture Market – UK 2004 – 2013 Constant Prices £M



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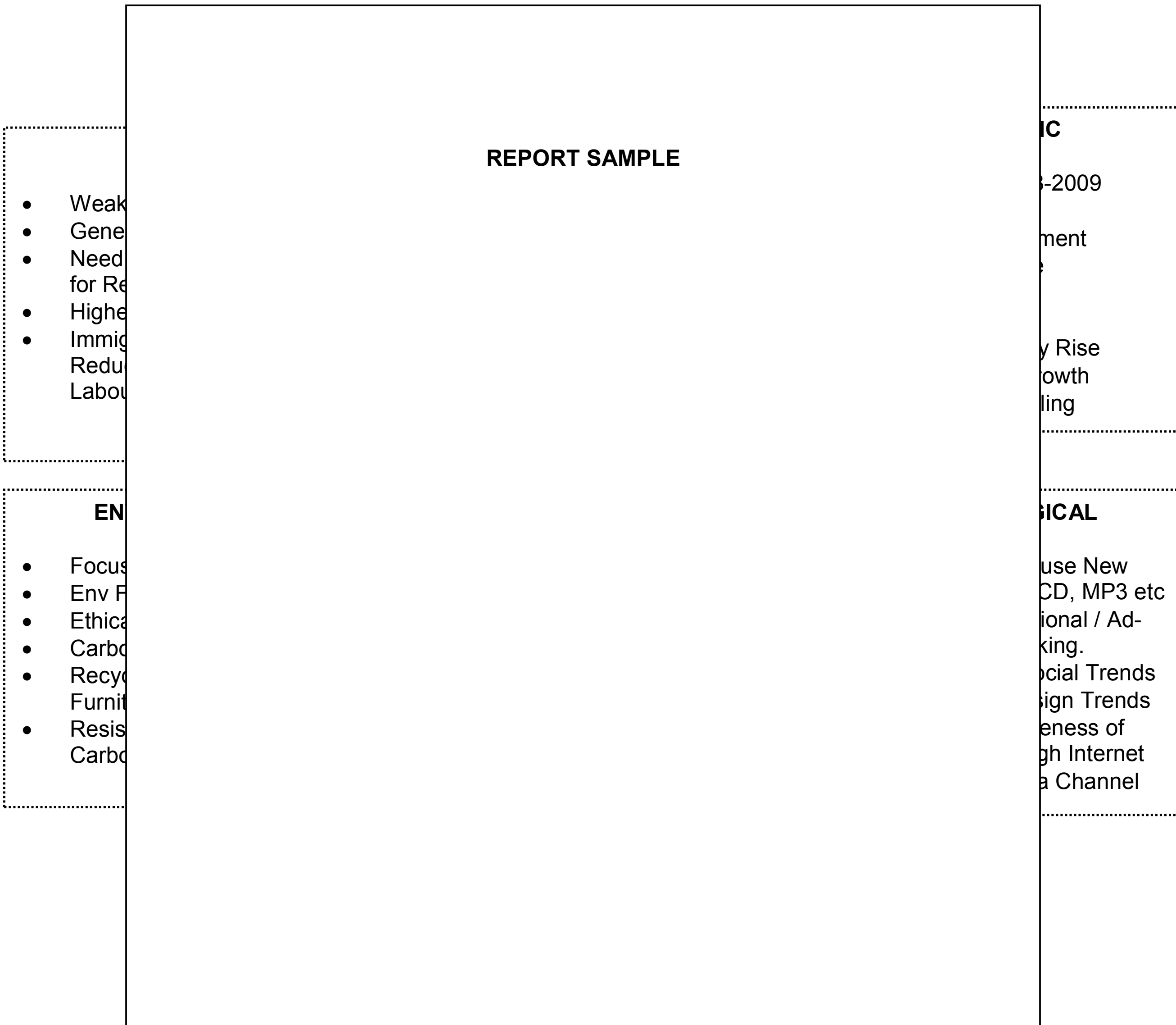
2.3 KEY MARKET TRENDS IN THE DINING, LIVING & OCCASIONAL FURNITURE MARKET

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 Dining, Living & Occasional 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 3: PEST Analysis for UK Dining, Living & Occasional Furniture Market in 2009



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2.3.2 Political & Legal Influences & Trends

The current UK political landscape is presently determined by the results of the last general election which was held in early May 2005. The Labour party was returned in 355 seats,

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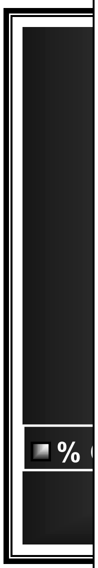

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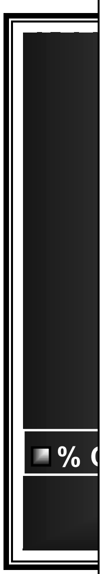

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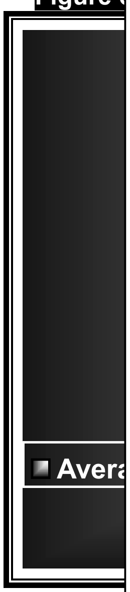

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2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the Dining, Living & Occasional Furniture market, the following table identifies some of the key strengths & weaknesses evident in the UK Dining, Living & Occasional Furniture market at present:-

Figure 8: Key Strengths & Weaknesses in the Dining, Living & Occasional Furniture Market 2009-2013

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REPORT SAMPLE

Source: MTW Research Strategic Review 2010

The following table identifies some of the key opportunities and threats evident in the market at present:-

Figure 9: Key Opportunites & Threats in the Dining, Living & Occasional Furniture Market 2009-2013

OPPORTUNITIES	THREATS
• Gr kitc • Use eat etc • Use thr • Re stin • Gr furr • Tec – e • Ho stin • 'Tra pur • 'Pe pur • Dif ada ava • Use sus eth • Use net con • Ris imp • Ris inc • Ava a re • Use to c • Pro mir con	. our for es from npanies ers of cts. which s. ntiated m et. me tax. at nt. etailers overall y cost es. esulting distinct azines,

REPORT SAMPLE

Source: MTW Research Strategic Review 2010

2.5 IMPORTS & EXPORTS OF FURNITURE 2004-2013

The following chart illustrates the level of imports of wooden dining and living room furniture since 2004 and forecasts to 2013 in value terms:-

Figure 10: Imports of Living & Dining Room Furniture By Value 2004-2013 £M

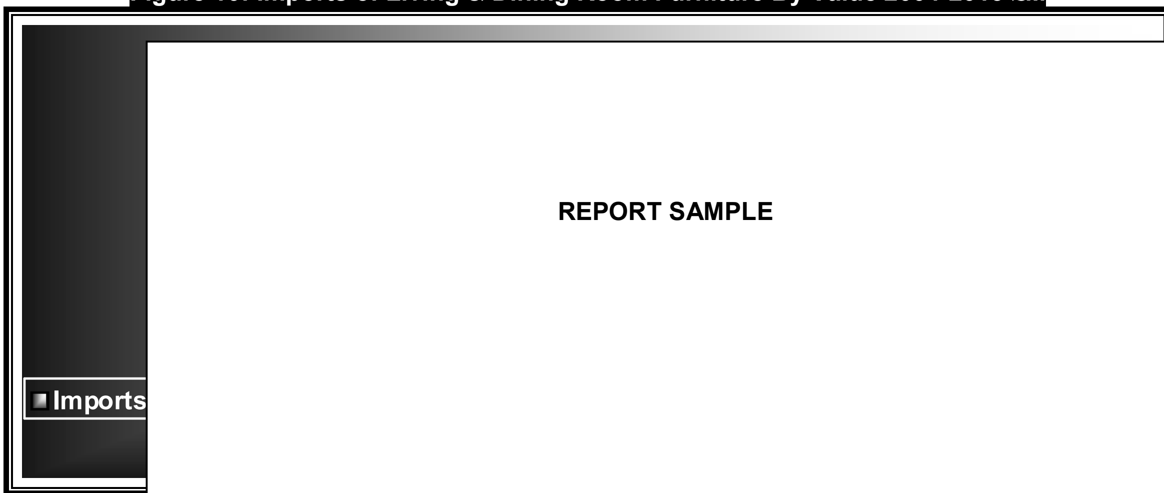

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Figure 11: Exports of Living & Dining Room Furniture By Value 2004-2013 £M

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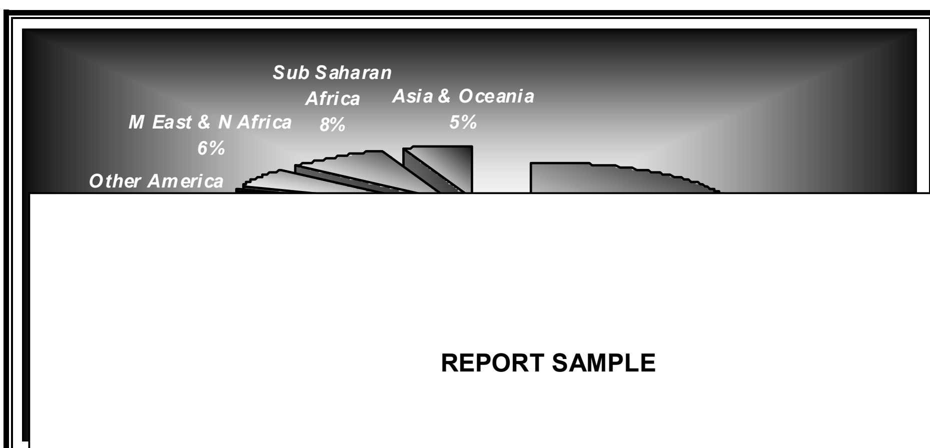
The following chart illustrates the share by key target countries for dining and living room furniture exports in 2010:-

Figure 12: Share by Key Export Country for Dining & Living Room Furniture 2009



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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 dining, living and occasional furniture market in 2010 is illustrated in the following chart:-

Figure 13: Share by Product in Dining, Living & Occasional Furniture Market 2010

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REPORT SAMPLE

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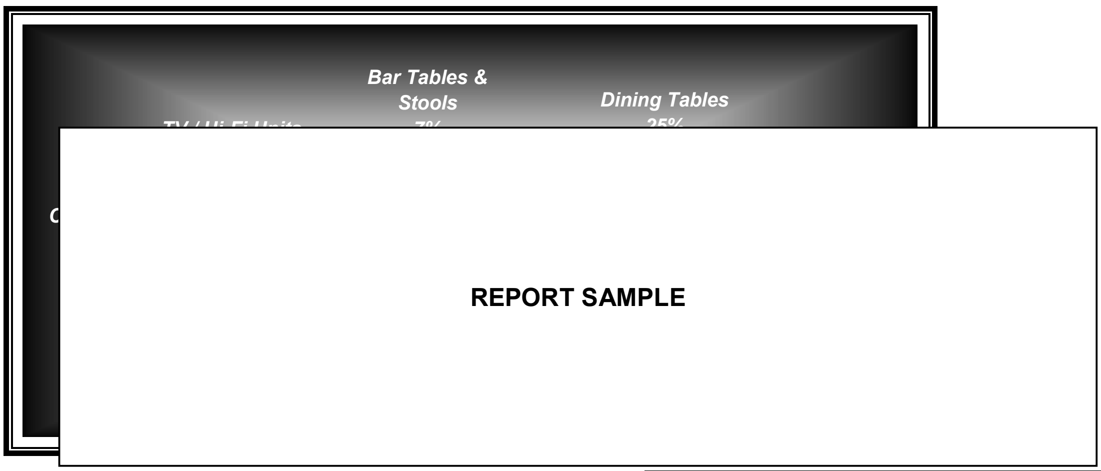
In order to illustrate historical trends, the following chart illustrates the share by key product sector in 2004:-

Figure 14: Share by Product in Dining, Living & Occasional Furniture Market 2004



Source: MTW Research / Trade Sources

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REPORT SAMPLE

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The ra… …the above … entert… promp…

The following chart illustrates the forecast share for each key product sector within the dining, living and occasional furniture market in 2013:-

Figure 15: Forecast Share by Product in Dining, Living & Occasional Furniture Market 2013

REPORT SAMPLE

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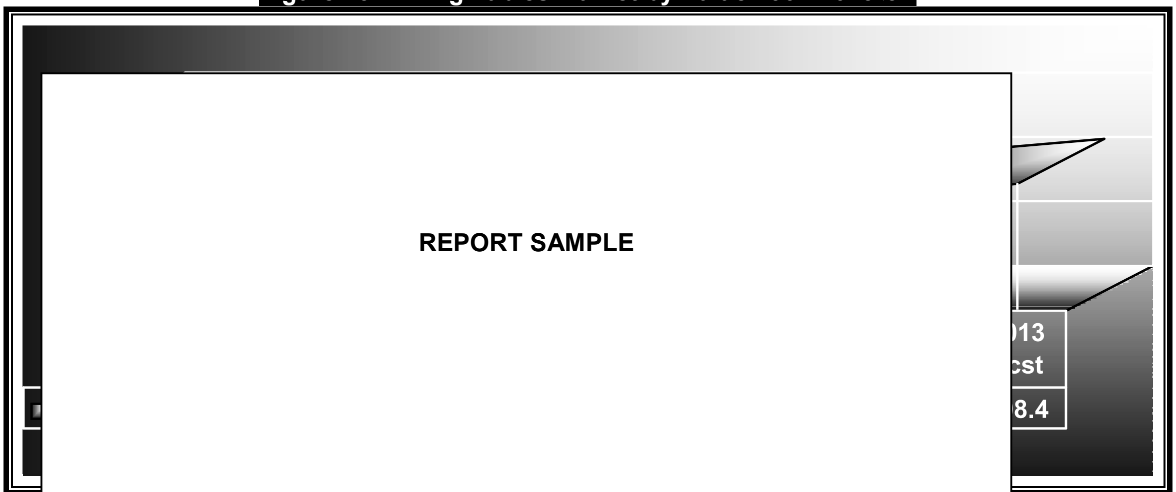
Historica …

3.2 Dining Tables Market 2004-2013

The following chart illustrates the performance of the domestic dining tables market by value since 2004 and forecasts to 2013:-

Figure 16: Dining Tables Market by Value 2004-2013 £M



REPORT SAMPLE

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fast ... Separate
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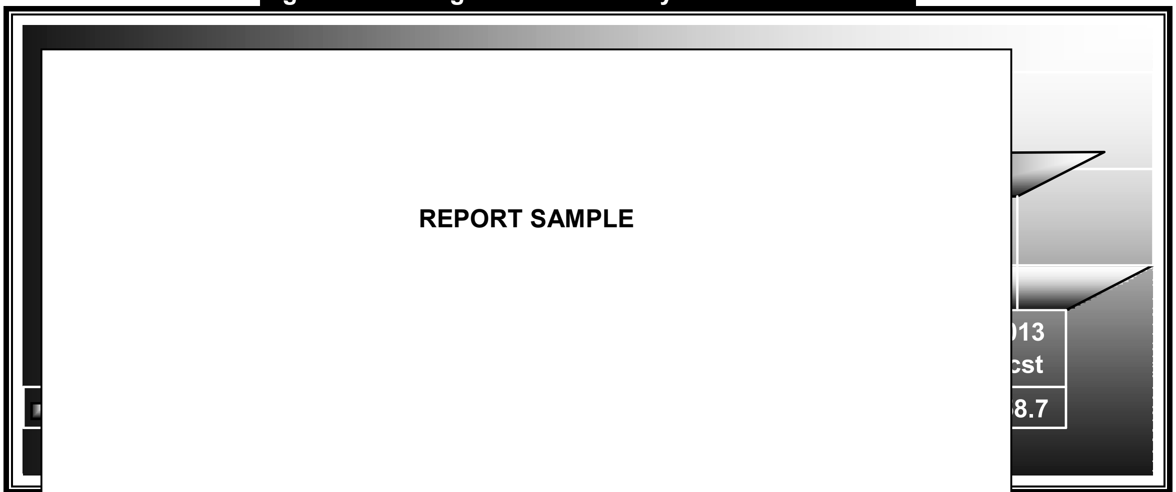
The ... w, with
brea ... s likely to

3.3 Dining Chairs Market 2004 – 2013

The following chart illustrates the performance of the domestic dining chairs market by value since 2004 and forecasts to 2013:-

Figure 17: Dining Chairs Market by Value 2004-2013 £M



REPORT SAMPLE

h / Trade Estimates

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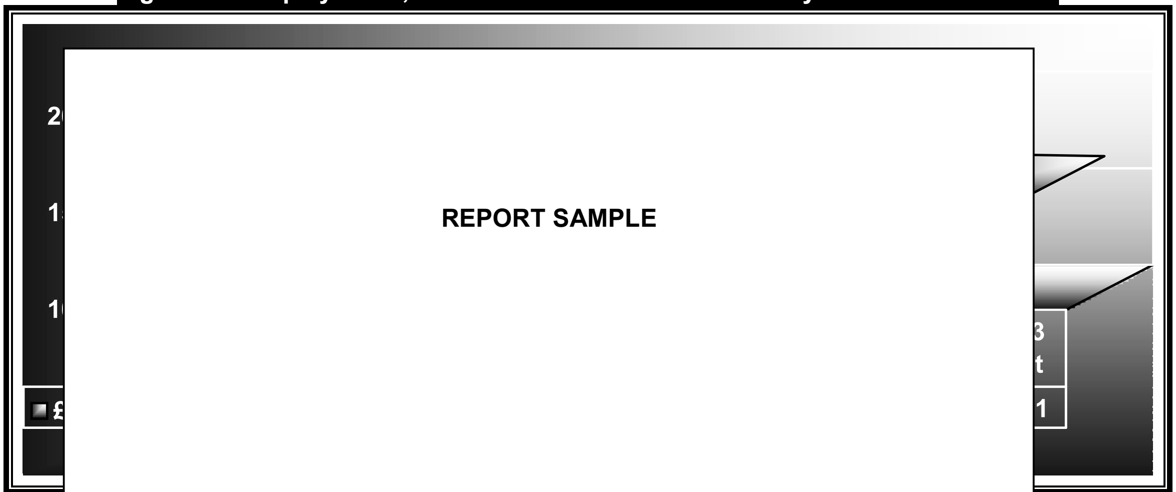
3.4 Display Units, Dressers & Sideboards Market 2004-2013

The following chart illustrates the performance of the display units, dressers and sideboards market by value since 2004 and forecasts to 2013:-

Figure 18: Display Units, Dressers & Sideboards Market by Value 2004-2013 £M



REPORT SAMPLE

Trade Estimates

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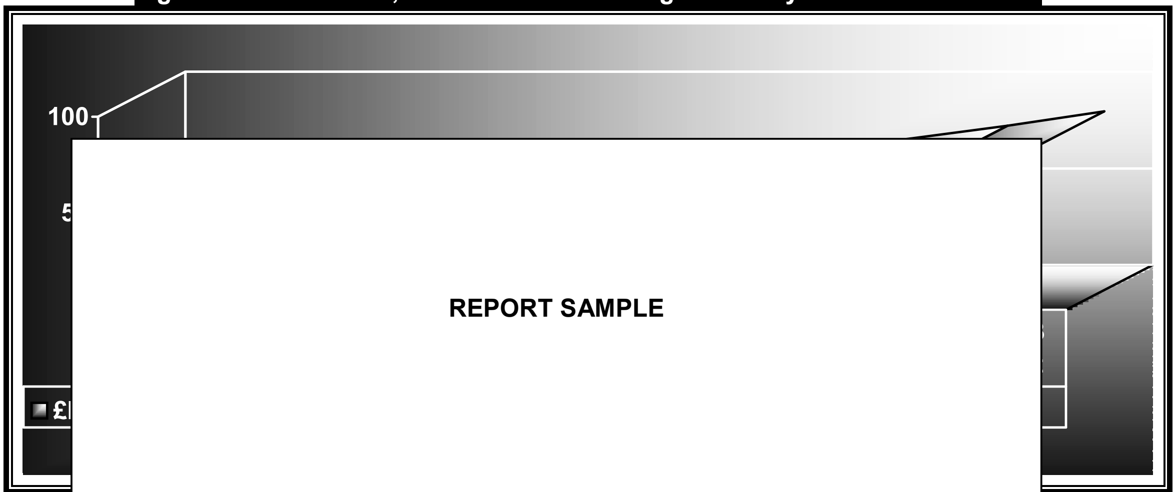
3.5 Shelf Units, CD/DVD Racks, Bookcases / Shelving Market 2004-2013

The following chart illustrates the performance of the shelf units, bookcases and shelving market by value since 2004 and forecasts to 2013:-

Figure 19: Shelf Units, Bookcases & Shelving Market by Value 2004-2013 £M



REPORT SAMPLE

Trade Estimates

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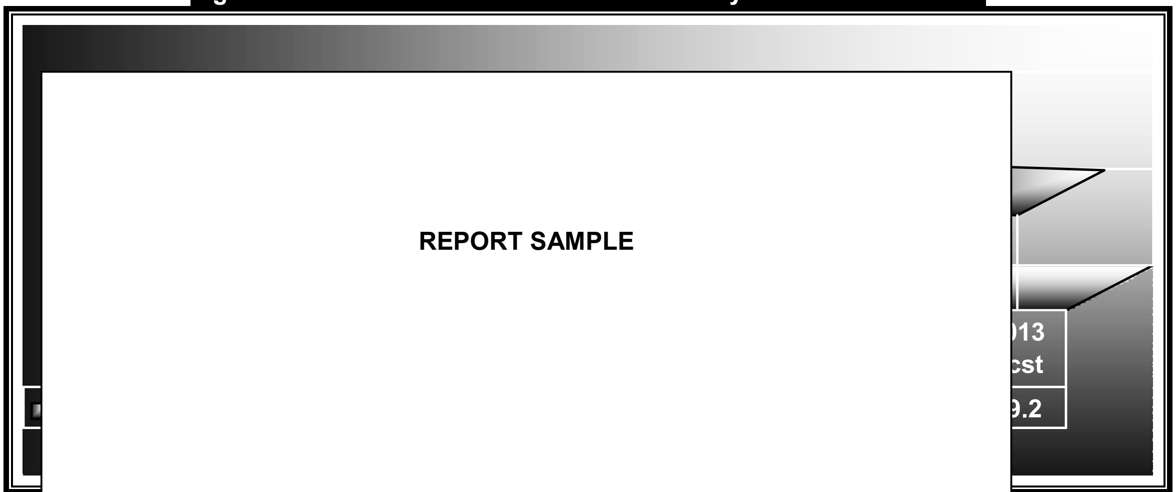
3.6 TV, HI-FI & Entertainment Units Market 2004 – 2013

The following chart illustrates the performance of the TV & Hi-Fi unit market by value since 2004 and forecasts to 2013:-

Figure 20: TV. Hi-Fi & Entertainment Market by Value 2004-2013 £M



REPORT SAMPLE

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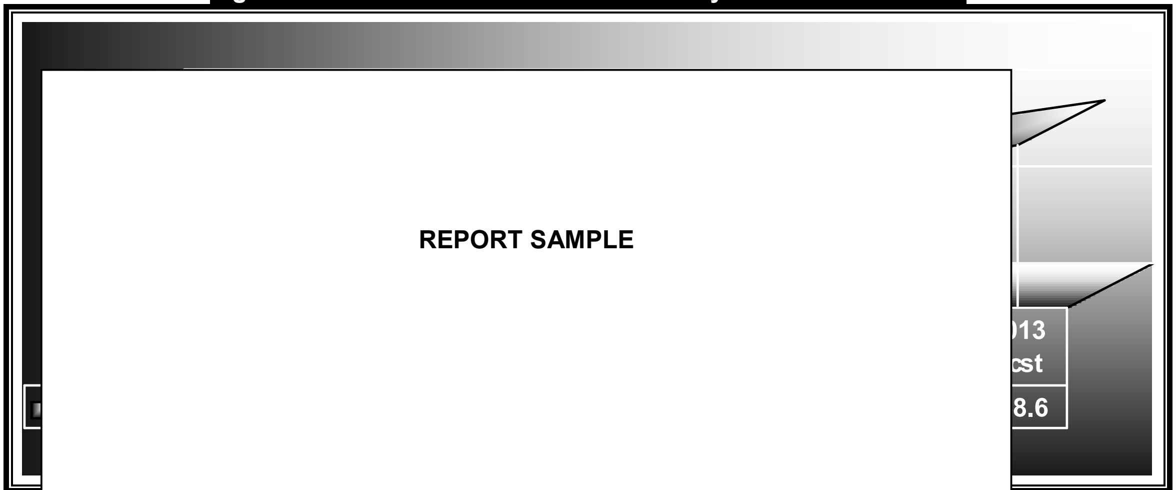
3.7 Bar Tables & Stools Market 2004 - 2013

The following chart illustrates the performance of the bars and stools market by value since 2004 and forecasts to 2013:-

Figure 21: Bar Tables and Stools Market by Value 2004-2013 £M



REPORT SAMPLE

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co … n as a place
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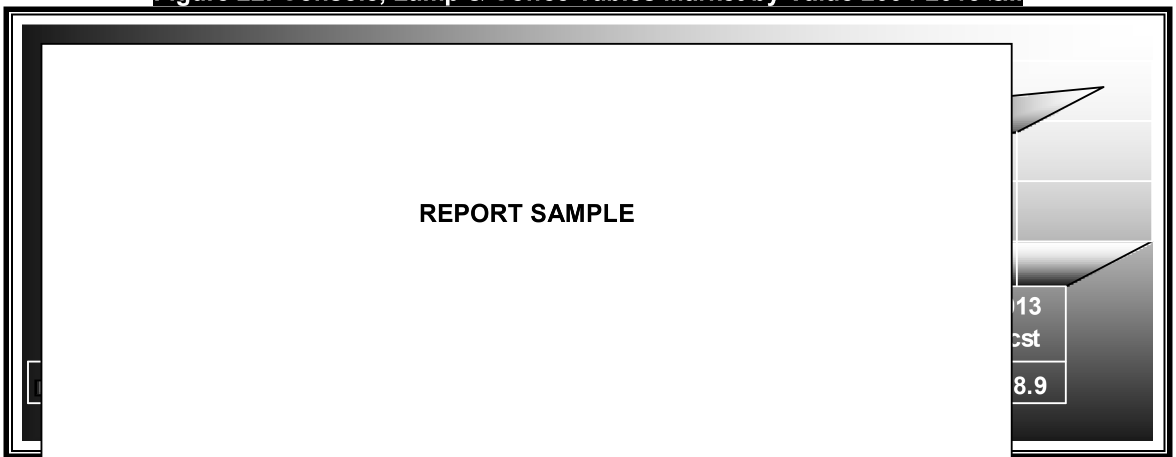
3.8 Console, Lamp & Coffee Tables Market 2004-2013

The following chart illustrates the performance of the Console, Lamp & Coffee Tables market by value since 2004 and forecasts to 2013:-

Figure 22: Console, Lamp & Coffee Tables Market by Value 2004-2013 £M



REPORT SAMPLE

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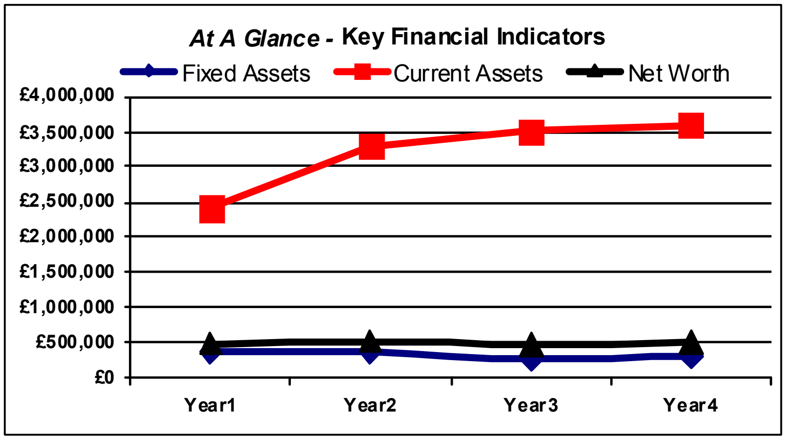
4. FURNITURE MANUFACTURER PROFILES

The following section identifies some of the key UK manufacturers 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 Furniture Manufacturers Profiles & KPIs

Sample Ltd - Company Overview & *'At a Glance'*

Sample Address
Sample Address
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on 18 July 1973. The company's main activities are recorded by Companies House as "The manufacture and wholesale of furniture." In early 2010, the company has an estimated 129 employees.

To year end 31/07/2008, Sample Ltd is estimated to have achieved a turnover of around £11 million. Pre-tax profit for the same period is estimated at around £30,000.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	The manufacture and wholesale of furniture.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	129
Senior Decision Maker / Director	Sample Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Figure 27: Sample Ltd - 4 Year KPIs to Year End 31/07/2008

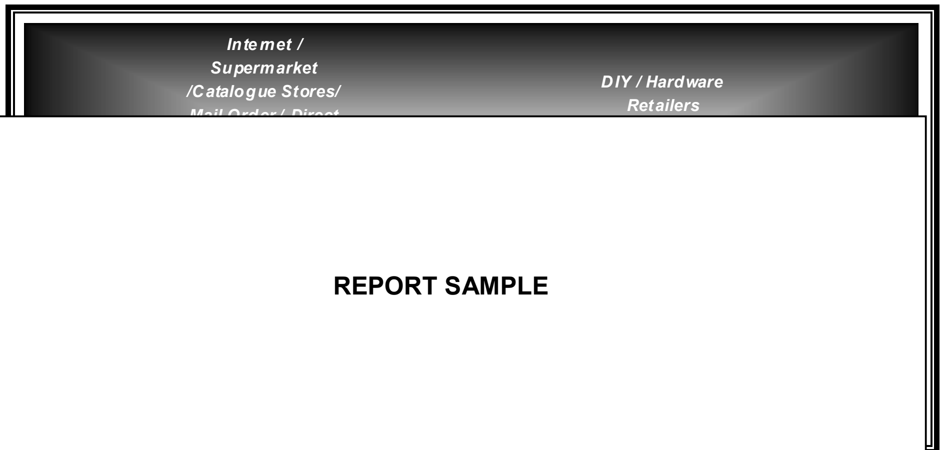
Key Indicator £	Year End 31/07/2005 (Year1)	Year End 31/07/2006 (Year2)	Year End 31/07/2007 (Year3)	Year End 31/07/2008 (Year4)
Fixed Assets	£370,000	£355,000	£264,000	£318,000
Current Assets	£2,406,000	£3,287,000	£3,507,000	£3,599,000
Current Liabilities	£1,748,000	£2,556,000	£2,757,000	£2,963,000
Long Term Liabilities	£543,000	£561,000	£534,000	£458,000
Net Worth	£485,000	£525,000	£480,000	£496,000
Working Capital	£658,000	£731,000	£750,000	£636,000
Profit per Employee	-£1,868	£217	£2,102	£233
Sales per Employee	n/a	n/a	n/a	n/a

5. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Distribution Channel 2010, 2004 & 2013

The share accounted for by each of the key distribution channels within the UK dining, living and occasional furniture market in 2010 is illustrated in the following chart:-

Figure 53: Share by Distribution Channel for Dining, Living & Occasional 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 54: Share by Distribution Channel for Dining, Living & Occasional Furniture Market 2004

REPORT SAMPLE

/ Trade Sources

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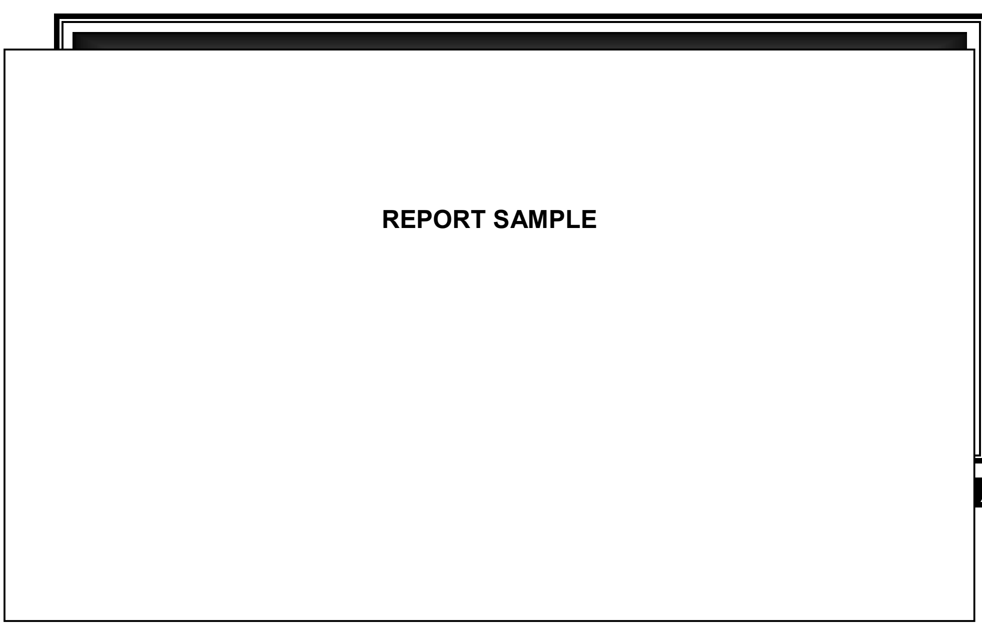
In terms of future prospects, the following chart illustrates the forecast share for each key channel in 2013:-

Figure 55: Share by Distribution Channel for Dining, Living & Occasional Furniture Market 2013



/ Trade Sources

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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 dining, living and occasional 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:-

REPORT SAMPLE

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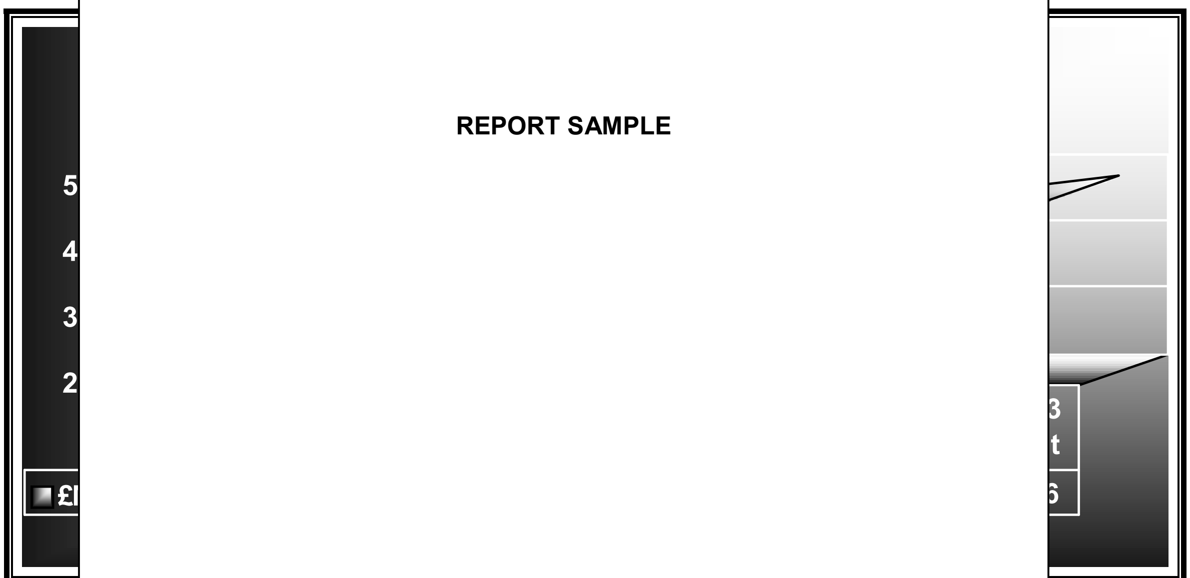
5.4 Key Market Trends in the Furniture Retailers Industry 2004-2013

The following section reviews some of the key trends in terms of financial performance of the UK Furniture Retail market since 2004, and forecasts to 2013.

5.4.1Furniture Retail Market Profitability 2004-2013

The following table illustrates the performance of the Furniture Retail market in terms of profitability between 2004 and 2009 and provides forecasts to 2013:-

REPORT SAMPLE



Trade Estimates

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5.4.2 Furniture Retail Industry Assets 2004-2013

The following table illustrates the Furniture Retail market in terms of current and fixed assets between 2004 and 2009 and forecasts to 2013:-

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 71: 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	Skan-Dansk 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	Sturtons & 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 72: Furniture Retailers Ranked By Turnover 2009

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Source: MTW Research / Company Accounts

5.5.3 Furniture Retailer Turnover Estimates 2009

The following table illustrates the estimated turnover for each company for 2009:-

Figure 73: Furniture Retailer Sales Estimates 2009 £M

REPORT SAMPLE

Trading Name	Turnover 2009	Trading Name	Turnover 2009
I			10.0
F			10.0
S			10.0
D			10.0
F			9.0
C			9.0
H			8.0
F			8.0
H			8.0
F			8.0
E			8.0
S			7.0
T			7.0
S			6.5
M			6.5
C			6.0
C			6.0
W			6.0
H			6.0
F			6.0
S			5.5
T			5.0
M			5.0
F			5.0
H			5.0
C			4.0
C			4.0
T			4.0
J			3.5
W			3.5
F			3.5
L			3.0
C			3.0
T			3.0
C			3.0
S			2.8
T			2.0
A			2.0
E			2.0
A			1.5
N			0.8
S			0.4
C			0.3
C			0.3
F			0.2
			0.1

Source: MTW Research / Company Accounts

5.5.4 Furniture Retailers Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the furniture retailers in 2009:-

Figure 74: Furniture Retailers Ranked By Profit 2009

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5.5.5 Furniture Retailers Ranking by Assets

The following table illustrates our estimates of the rank by total fixed and current assets for each company in 2009:-

Figure 75: Furniture Retailers Ranked By Assets 2009

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gs)

h / Company Accounts

5.5.6 Furniture Retailers Ranking by Debt

The following table illustrates the rankings by total debt for each company in 2009:-

Figure 76: Furniture Retailers Ranked By Debt 2009

REPORT SAMPLE

ishers
lisle)

urniture

h / Company Accounts

47.Browns York

5.5.7 Furniture Retailers Ranking by Net Worth

The following table illustrates the ranking for each company by net worth in 2009:-

Figure 77: Furniture Retailers Ranked By Net Worth 2009

REPORT SAMPLE

ld

ishers

gs)

urniture

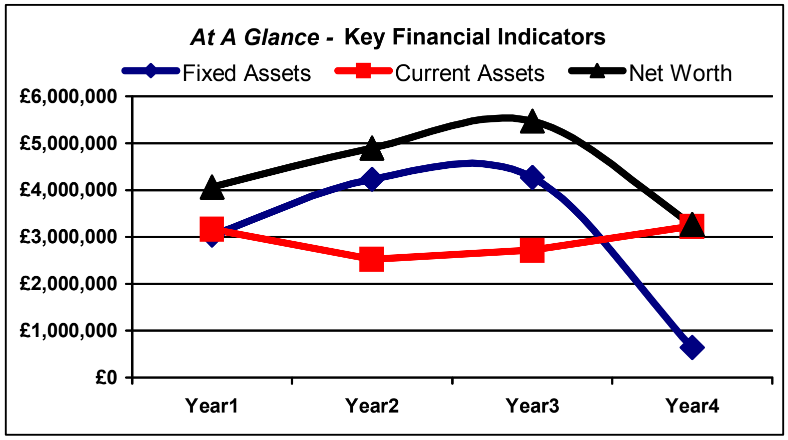
Source: MTW Research / Company Accounts

5.6 Furniture Retailers Profiles, KPIs & 'At a Glance'T

The following chapter illustrates the key financial indicators for the key players active in the UK FM industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description of activities, estimate of number of employees and contact details.

Sample Ltd - Company Overview & *'At a Glance'*

Sample Street
Sample Address
Sample Postcode
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on February 26, 1951. The company's main activities are recorded by Companies House as "Retail trading and the provision of financial services." In early 2010, the company has an estimated 70 employees.

To year end 28/01/2009, Sample Ltd is estimated to have achieved a turnover of around £13.0 million. Pre-tax profit for the same period is estimated at around £0.50 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Retail trading and the provision of financial services.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	70
Senior Decision Maker / Director	T Sample

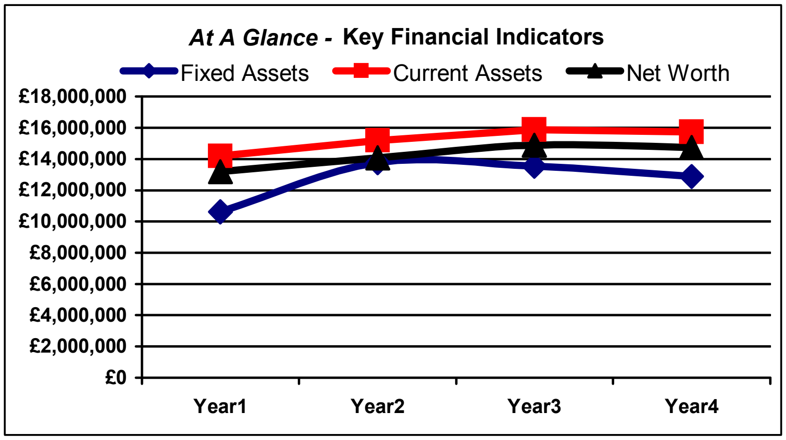
The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 28/01/2009

Key Indicator £	Year End 25/01/2006 (Year1)	Year End 31/01/2007 (Year2)	Year End 30/01/2008 (Year3)	Year End 28/01/2009 (Year4)
Fixed Assets	£3,039,000	£4,232,000	£4,271,000	£646,000
Current Assets	£3,164,000	£2,523,000	£2,713,000	£3,232,000
Current Liabilities	£1,005,000	£1,264,000	£842,000	£542,000
Long Term Liabilities	£1,128,000	£589,000	£666,000	£69,000
Net Worth	£4,070,000	£4,902,000	£5,476,000	£3,267,000
Working Capital	£2,159,000	£1,259,000	£1,871,000	£2,690,000
Profit per Employee	£5,846	£9,072	£10,574	£7,246
Sales per Employee	n/a	n/a	n/a	n/a

Sample Ltd - Company Overview & *'At a Glance'*

Sample Street
Sample Park
Sample
Sample
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on August 20, 1968. The company's main activities are recorded by Companies House as "A group engaged in the retail of furniture." In early 2010, the company has an estimated 370 employees.

To year end 31/03/2008, Sample Ltd is estimated to have achieved a turnover of around £60.0 million. Pre-tax profit for the same period is estimated at around £0.03 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	A group engaged in the retail of furniture.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	370
Senior Decision Maker / Director	Peter Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31/03/2008

Key Indicator £	Year End 31/03/2005 (Year1)	Year End 31/03/2006 (Year2)	Year End 31/03/2007 (Year3)	Year End 31/03/2008 (Year4)
Fixed Assets	£10,608,000	£13,766,000	£13,542,000	£12,895,000
Current Assets	£14,191,000	£15,178,000	£15,881,000	£15,745,000
Current Liabilities	£9,750,000	£10,915,000	£11,118,000	£10,728,000
Long Term Liabilities	£1,856,000	£3,960,000	£3,438,000	£3,162,000
Net Worth	£13,193,000	£14,069,000	£14,867,000	£14,750,000
Working Capital	£4,441,000	£4,263,000	£4,763,000	£5,017,000
Profit per Employee	£9,544	£4,493	£4,468	£92
Sales per Employee	£162,877	£151,752	£154,209	£152,862