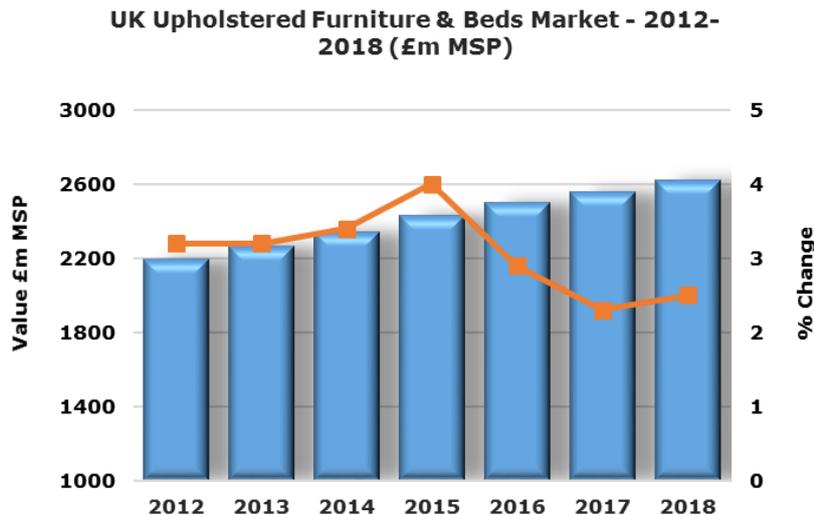




## PRESS RELEASE

### Steady growth overall in the UK upholstered furniture and beds sectors

December 2016 – Cheltenham, UK



The UK upholstered furniture and beds market has shown good growth in recent years of around 3-4% per annum until 2015, with a further increase of around 3% expected in 2016. According to a new report by AMA Research, reasons for the market increasing steadily in the 2012-15 period, include an improving UK economy, rising consumer confidence and an increase in sales of higher value products.

In the upholstered furniture sector, sales of single sofas and convertibles represent an important part of the upholstered furniture market, while armchairs sold separately account for smaller share. Modular, corner, U Shaped sofas are gaining share. These flexible designs are suited to open plan living and are adaptable to different spaces. The share accounted for by leather has declined marginally over the last 3-5 years, with the wide range of colours and styles supporting the growth of the fabric sector.

During the last 5 years, there has been a marked trend towards double beds and, in particular, to king sized beds. This growth is largely attributed partly to the high level of price competition within the market, particularly in the bedstead sector. Growth in the mattress sector has been underpinned by increased demand for higher value pocket sprung mattresses, along with the growing popularity of other materials, such as memory foam. Demand for divan sets has fallen steadily due to growth in demand for mattresses, either sold separately as a replacement purchase or together with bedsteads, including wooden, upholstered and metal bedsteads.

The supply structure of the upholstered furniture market has not changed dramatically in recent years, though the major suppliers have increased their overall share of the market. The furniture multiples continue to dominate the distribution of upholstered furniture, with multiple specialists such as DFS, ScS and Sofology accounting for a significant share, along with general furniture multiples, such as IKEA, Harveys and Furniture Village, and department stores/variety chains. Imports of upholstered furniture have increased in the 2012-15 period to reach around 45% of the market by value, with imports from China now accounting for the major share.

The beds sector is more concentrated in terms of suppliers compared with the upholstered furniture market, however, in recent months there has been considerable activity in the mattress sector, with newer entrants specialising in offering a compact range of products, often via the internet and available for early delivery.

While forecasts for the UK economy in 2016 have recently been upgraded slightly by the major forecasting institutions, the uncertainty surrounding Brexit and the current high levels of indebtedness for many people is likely to impact consumer confidence. The rate of growth until 2020 is expected to be lower than in the last few years. While the upholstered furniture and beds sectors are relatively mature, a growing demand for housing should stimulate market growth. Mattresses are one specific area of the beds market where opportunities for further value growth exist, with relatively short replacement cycles and consumers trading up to higher quality products.

*"The popularity of modern and contemporary furniture seems to favour alternative furniture combinations, rather than the traditional 3-piece suites" said Hayley Thornley, Research Manager at AMA Research. "Other trends include flexible and modular furniture options to allow for open plan living areas and awkward spaces. This is also reflected in the range of design options now offered, including corner sofas, u-shaped sofas and chaise sofas."*

The '**Upholstered Furniture and Beds Market Report – UK 2016-2020 Analysis**' report is published by AMA Research, a leading provider of market research and consultancy services within the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

#### **Editor's Note:**

If you would like to receive further information or wish to speak to an author of this report, please contact Anna Eriksson or Hayley Thornley on (01242) 235724.

Please include our web address and telephone number on any review printed, and it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

AMA Research Ltd  
Montpellier House  
Montpellier Drive  
Cheltenham  
Gloucestershire GL50 1TY  
Tel: +44 (0)1242 235724  
Fax: +44 (0)1242 262948  
E-mail: [annaeriksson@amaresearch.co.uk](mailto:annaeriksson@amaresearch.co.uk)  
Website: [www.amaresearch.co.uk](http://www.amaresearch.co.uk)