Introduction and Overview

The 15th edition of the 'Domestic Kitchen Furniture Market Report - UK 2019-2023' has been published by AMA Research. The kitchen furniture market saw increasing growth until 2016, but since then the rate of growth has slowed annually with uncertainty about the UK economy and the Brexit decision affecting consumer confidence and expenditure. This report incorporates original input and primary research and represents an up-to-date and comprehensive review of the kitchen furniture market.

Product sectors covered include:

- Kitchen Furniture
- Sinks
- Worktops

Key areas of insight include:

- Estimates and forecasts for 2019 through to 2023.
- Improvements in materials and designs, providing a wider choice of work surfaces, sinks and accessories in particular, together with more products adapted for elderly and infirm customers.
- Greater consumer awareness of products and fashion trends within the industry, with customers increasingly using the internet to research available products online, before examining potential layouts in situ at various retail outlets.
- Growth in the market has benefited suppliers, such as Howden Joinery, Wren Kitchens and the Symphony Group.
- The emergence of the 'smart kitchen' with the remote control of appliances from a smart phone is still in its infancy, with forecasts of growing penetration from an estimated 10% of appliances in 2018.
- Detailed market data and insight on the domestic kitchen furniture market by AMA Research, a leading UK provider of construction market intelligence.

Some of the companies featured include:

AGA Rangemaster Ltd, Astracast, Franke U.K. Holding Ltd, Blanco UK, Nobia Holdings UK Ltd (Including Magnet, Gower Furniture, Rixonway Kitchens and Commodore Kitchens), The Symphony Group plc, Wren Living Ltd, Dennis & Robinson Ltd
The Market

- Total kitchen furniture market - market background, product mix by value.
- Factors influencing market development - housebuilding, economy, house price inflation, RMI, consumer confidence, growing influence of design/style changes, population mix changes, increases in the number of second/third time buyers, decent homes programme etc.
- Imports and exports - developments in import and export levels to 2017 (with estimates for 2018), factors influencing the level of imports and the changes in exports.
- Fitted kitchen furniture ownership - changes in ownership levels 2018, factors influencing current and future ownership levels e.g. new housebuilding, choice of products now available, social housing.
- Kitchen appliances - annual sales of integrated and free-standing products, mix by type of appliance, influence of appliance sales in fitted kitchen furniture market.

Products & Product Mix

- Trends in design/materials in kitchen furniture - high proportion of modern and contemporary designs, greater consumer awareness; emphasis on performance and benefits, quality and features, trends in colours and finishes, long term trends in styles and designs, etc.
- Flat-Pack/rigid units - market share mix, quality levels of flat-pack kitchens, factors affecting mix between flat-pack and rigid kitchens, market share of flat-pack/rigid kitchens, assembly methods of kitchen furniture.
- Trends in design/materials in worktops - share mix by material, colour/pattern trends in worktops, growth of non-laminate materials such as solid surfaces, wood, stone/granite, stainless-steel advantages/disadvantages, new product developments.
- Trends in design/materials in sinks - historic / current developments in materials, current and future trends, material share estimates, factors influencing material trends e.g. product development, fashion influences, popular colours, trends in other kitchen products. Sinks designed as ‘food preparation areas’.

Distribution/Suppliers

- Analysis of supply structure - supplier market shares, recent developments in supplier shares.
- Profiles of leading suppliers - furniture, worktops, sinks suppliers, market position, analysis of activities, financial information etc.
- Distribution channel shares - shares by value, trends/developments in shares, growth/declining sectors.
- Role of distributors - importance of distributors in kitchen furniture market, own branding by distributors, review of...
major national distributors.

Report Summary
The kitchen furniture market is resilient and is driven to a large and increasing extent by replacement and improvement activity. This RMI sector is likely to provide a solid basis for market recovery, once the uncertainty of Brexit has been resolved. A previously strong performance in the housebuilding and housemoving sectors has been followed by more modest growth, which is likely to continue in the next few years, despite the acknowledged need for a more robust housebuilding programme. In the longer term, an improving economic outlook and renewed consumer confidence should help to create a positive environment for the kitchen furniture market.

Within the supply chain, margins are likely to be squeezed by the increasing cost of imported raw materials, although the effects of this should start to dissipate soon. In addition, continuing strong competition amongst both manufacturers and retailers could lead to further casualties in both sectors. Future growth in the market may support a higher level of imports, although UK manufacturers are increasingly competitive in terms of pricing and design innovation.

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About AMA Research

Established in 1989, AMA Research is widely recognised as the leading specialist provider of market research to the UK building and construction industries. AMA's research and analysis goes beyond the more commonly available range of statistical and company information to provide expert, informed commentary and in-depth market analysis, making the reports a valuable and relevant resource for understanding the UK's construction and associated markets.

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