

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Popularity of creative home cooking and baking, especially at weekends, is adding to a love of gadgets and small kitchen appliances, which in turn means that people need to make the most efficient use of their storage and work surfaces. Creating more work spaces and better storage are key factors when people change their kitchen layouts."

- Jane Westgarth Senior Retail Analyst

This report looks at the following areas:

- How much influence do builders have in choosing where to buy?
- Kitchen planners are a vital ingredient in this market place
- How is the role of the kitchen changing?

Consumer spending on kitchens rose by 6.4% in 2015, helped by a buoyant housing market and strong consumer confidence. 2016 began well, but uncertainty created by the decision to leave the EU is likely to cool demand so that 2016's spending is expected to be 3% ahead of 2015, at £3,430 million. We forecast a further 12.4% growth over 2016-21, as people invest to get what they want from their kitchens. Kitchen refits in the last three years helped consumers improve the value of their homes, making them easier to sell. But ultimately, better kitchens make people feel happier in their homes, creating a space for socialising, spending quality time with the family, enjoying the pastime of cooking and being the room in the home where they create some of their fondest memories. This emotional attachment to kitchens will be a key factor in helping drive demand over the next five years.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
 Products covered in this Report

Executive Summary

The market

Post-Brexit demand governed by uncertainty

Figure 1: Consumer spend on kitchens, 2011-21

Cupboards account for 57% of spending

Figure 2: Market for kitchens, by segment, 2015 (Est)

The impact of private renting

The housing market

Figure 3: housing transactions, UK, Feb 15-July 16

Key market drivers

Companies, brands and innovation

Competition heats up

Figure 4: Distribution of kitchens, 2015 (est)

Internet is essential as part of the customer journey

High growth from Wren and Howdens

Three major kitchen suppliers dominate in the UK

Range development

Magnet innovates with fold-out and hidden shelving

Virtual Reality enhances visuals

Online developments

Store layouts and design continue to develop

John Lewis focuses on the Smart Home

The consumer

22% of homes have a separate utility room

Figure 5: Kitchen/utility room in household, July 2016

49% have all free-standing kitchen appliances

Figure 6: Type of appliances in kitchen, July 2016

Wide variety of kitchen layouts in the UK's homes

Figure 7: Kitchen and dining areas, July 2016

Some 5% of kitchens refitted each year

Figure 8: Kitchen and utility room refit/repair, July 2016

Home owners more likely to refit or repair

Figure 9: Kitchen and utility room refit/repair, who paid, July 2016

Room refits are comprehensive

BUY THIS
 REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Details of kitchen/utility room refits, July 2016

Fittings and accessories are the biggest expense

Figure 11: Amount spent on kitchen/utility room refits, July 2016

Keeping the kitchen updated

Figure 12: Reasons for refitting the kitchen, July 2016

Remaining in control

Figure 13: Influence of builder on deciding where to buy kitchens, July 2016

57% shop at DIY retailers

Figure 14: Retailers/suppliers used for kitchens, July 2016

The people factor

Figure 15: Factors influencing choice of retailer/supplier, July 2016

Non-buyers focus more on price

Figure 16: Factors influencing choice of retailer/supplier, July 2016

Kitchen customer target groups

Figure 17: Target groups for kitchens, July 2016

What we think

Issues and Insights

How much influence do builders have in choosing where to buy?

The facts

The implications

Kitchen planners are a vital ingredient in this market place

The facts

The implications

How is the role of the kitchen changing?

The facts

The implications

The Market – What You Need to Know

Uncertainty governs consumer sentiment

Cupboards account for 57% of spending

Competition for kitchens intensifies

Internet is hugely important as a source of ideas

Will we see 'improve not move' in post-Brexit Britain?

The impact of private renting

The kitchen is a home hub

How the nation cooks

Charging electronic devices in the kitchen

Market Size and Forecast

Uncertainty governs consumer sentiment

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 18: Consumer spending on kitchens, 2011-21

Slowdown in market growth post-Brexit

Figure 19: Consumer spending on kitchens, 2011-21

The impact of the EU referendum vote

Spending on the home was down in previous slowdowns

Figure 20: Alternative market scenarios for the post-Brexit kitchen furniture market, at current prices, 2016-21

Figure 21: Detailed Post-Brexit scenarios for the kitchen market, at current prices, 2016-21

Consumers are already shopping with savvy

Forecast methodology

Market Segmentation

Cupboards account for 57% of spending

Figure 22: Market for kitchens, by segment, 2015 (Est)

The kitchen as a living space

Connecting up to the internet

Instant hot water

Innovative storage

Channels to Market

DIY stores face intensifying competition

Figure 23: Distribution of kitchens, 2015 (est)

The role of online browsing and selling

Market Drivers

The housing market

Figure 24: housing transactions, UK, Feb 15-July 16

Will a slower housing market mean a surge in 'improve not move?'

Private renting

Figure 25: Housing tenure, UK, 2012-16

Home improvements

Figure 26: Spending plans for the home, June 2012 – August 2016

Figure 27: Percentage point change in intention to spend on the home, June-August 2015-16

The kitchen is a home hub

Figure 28: Reasons for spending on the home, November 2015

Extending the home

Figure 29: Extensions and conservatories in the last three years, by age and socio-economic group, November 2015

Cooking from scratch

Figure 30: Frequency of cooking in the home, by type of meal, February 2016

The convenience of prepared foods

Figure 31: Frequency of cooking in the home, meals cooked completely from scratch, February 2016

Charging devices in the kitchen

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 32: Personal ownership of consumer technology products, December 2015

Companies and Brands – What You Need to Know

- Homebase sold to Wesfarmers
- High growth from Wren and Howdens
- High profitability at Howdens
- Fitting services are highly important
- Three major kitchen suppliers dominate in the UK
- Range development
- Smaller chains and independents pitch for a higher-end customer
- Magnet demonstrates its commitment to innovation
- Online developments
- Stores innovate with layout and design
- Virtual Reality enhances visuals
- John Lewis focuses on the Smart Home

Companies and Brands – Retailers

- Retail turnover
 - High growth from Wren and Howdens
 - Figure 33: Leading kitchen retailers, total company turnover, 2011-15
- Operating profit
 - Figure 34: Leading kitchen retailers, operating profit, 2011-15
- Operating margin
 - Figure 35: Leading kitchen retailers, operating margin, 2011-15
- Store numbers
 - Figure 36: Leading kitchen retailers, store numbers, 2011-15
- Sales per store
 - Figure 37: Leading kitchen retailers, sales per store (excluding VAT), 2011-15
- Magnet is the dominant kitchen chain in the UK
- Growing competition from Wren
- Howdens unique formula is highly successful
- DIY retailers dominate retailing of kitchens
- Bunnings fascia to replace Homebase
- Serving the trade
- Stiff competition from builders' merchants
- Ikea gains ground
- John Lewis
- Other specialists

Companies and Brands – Suppliers

- Nobia is the leading supplier of kitchens in the UK

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Suppliers of kitchen furniture, turnover, 2011-15

Competitive Strategies

Focus on full service

Improving geographical reach

Figure 39: Store numbers, leading kitchen retailers, 2011-15

IKEA re-addresses product quality

Launch Activity and Innovation

Magnet benefits from process of continuous innovation

Figure 40: Magnet, pull down shelves, 2016

Figure 41: Magnet, work top shelves, 2016

Figure 42: Magnet, Worktop plus, 2016

Retail innovation

B&Q improving its online to in-store journey

New concept DIY stores

Consumer generated content

IKEA develops small footprint stores

Virtual Reality Kitchens

John Lewis focuses on the Smart Home

Wren training academy

Product innovations

Sink with a fold-away tap

Figure 43: ICON sink with fold-away tap, August 2015

Sliding doors in the kitchen

Figure 44: Toplevel L sliding doors, August 2015

Advertising and Marketing Activity

£42 million of adspend on kitchens

Figure 45: Total above-the line, online display and direct mail advertising expenditure on kitchens, 2012-15

B&Q's kitchen advertising jumps in 2015

Figure 46: top ten advertisers, kitchens, 2012-15

Television dominates media spend

Figure 47: Advertising for kitchens, by media, 2015

Advertising specifics

Wickes focusses on a kitchen as a family hub

IKEA encourages kitchen fun

B&Q promoting online searches

Magnet features beauty and innovation

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Variety of kitchen layouts
 Fashion for built-in appliances
 Kitchens refitted every 20 years
 Kitchen refits are comprehensive
 Reasons for kitchen refits
 Creating services that appeal to builders
 29% bought from B&Q
 Human contact is a vital ingredient
 An investment, but a hassle
 Happiness at home
 Four key target groups

Kitchen/Utility Room in Household

22% of households has a utility room
 Figure 48: Kitchen/utility room in household, July 2016

Home owners most likely to have a utility room
 Figure 49: Kitchen/utility room in household, by current housing situation, July 2016

Type of Appliances in the Kitchen

Figure 50: Type of appliances in the kitchen, July 2016

Lower social groups most likely to have free-standing appliances
 Figure 51: Type of appliances in kitchen, by demographic status, July 2016

Higher incomes favour built-in appliances
 Figure 52: Type of appliances in kitchen, by gross income, July 2016

All free-standing kitchens are highly likely when renting
 Figure 53: Type of appliances in kitchen, by housing situation, July 2016

Younger households most likely to have built-in appliances
 Figure 54: Type of appliances in kitchen, by gender and age, July 2016

Kitchen and Dining Areas in the UK's Homes

Figure 55: Kitchen and dining areas, July 2016

ABs most likely to have a separate dining room
 Figure 56: Kitchen and dining areas, by demographic status, July 2016

Open plan kitchen/living rooms most common for small households
 Figure 57: Kitchen and dining areas, by household size, July 2016

15% of homes revamped kitchens in the last three years
 Figure 58: Kitchen and utility room refit/repair, July 2016

Home improvements are more likely for younger householders
 Figure 59: Kitchen and utility room refit/repair, by gender and age, July 2016

Kitchen and Utility Room Refit/Repair

Home owners more likely to refit or repair

BUY THIS
 REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Kitchen and utility room refit/repair, who paid, July 2016

Londoners most likely to revamp utility rooms

Figure 61: Kitchen and utility room refit/repair, by region, July 2016

Households with young families most inclined to revamp kitchens

Figure 62: Kitchen and utility room refit/repair, by parenting status, July 2016

Kitchen improvements most likely 1-5 years after house moves

Figure 63: Kitchen and utility room refit/repair, by time lived in home, July 2016

Details of Kitchen/Utility Room Refits

22% of kitchen refits included an instant hot water tap

Figure 64: Details of kitchen/utility room refits, July 2016

Spend on Kitchen Refits

Figure 65: Amount spent on kitchen/utility room refits, July 2016

Reasons for Refitting the Kitchen

Keeping the kitchen updated

Changing the layout

Desire to change appliances as part of a refit

Figure 66: Reasons for refitting the kitchen, July 2016

Influence of Builder on Deciding Where to Buy Kitchens

Builders influence 48% of decisions about purchasing kitchens

Figure 67: Influence of builder on deciding where to buy kitchens, July 2016

Retailers/Suppliers Used for Kitchens

Comparing 2016 with 2015

Figure 68: Retailers/suppliers used for kitchens, June 2015 and July 2016

DIY retailers lead in the kitchen market

Figure 69: Retailers/suppliers used for kitchens, July 2016

Factors Influencing Choice of Retailer/Supplier

Helpful designers are the most influential factor in retail choice

Fitting services please

Special deals

Figure 70: Factors influencing choice of retailer/supplier, July 2016

Non-buyers focus more on special deals

Figure 71: Factors influencing choice of retailer/supplier, July 2016

AB households have a broader wish list

Figure 72: Factors influencing choice of retailer/supplier, by demographic status, July 2016

Attitudes Regarding Kitchens

Figure 73: Attitudes regarding kitchens, July 2016

Four main target groups

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Kitchens and Kitchen Furniture - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 74: Target groups for kitchens, July 2016

Kitchen Hosts (25%)

Attitudes to the kitchen

Figure 75: Attitudes regarding kitchens, by target group, kitchen hosts. July 2016

Who are they?

About their kitchens

Recent kitchen revamps

Figure 76: Factors influencing choice of retailer for kitchen refits, by Target groups, kitchen hosts, July 2016

Where they shop

Marketing analysis

Kitchens Add Value (25%)

Attitudes to the kitchen

Figure 77: Attitudes regarding kitchens, by target group, kitchens add value, July 2016

Who are they?

About their kitchens

What influences their choice of retailer?

Figure 78: Factors influencing choice of retailer for kitchen refits, by Target groups, kitchens add value, July 2016

Marketing analysis

Family Kitchens (33%)

Attitudes to the kitchen

Figure 79: Attitudes regarding kitchens, by target group, family kitchens. July 2016

Who are they?

About their kitchens

What influences their choice of retailer?

Figure 80: Factors influencing choice of retailer for kitchen refits, by Target groups, family kitchens, July 2016

Marketing analysis

Cost-conscious Kitchens (17%)

Attitudes to the kitchen

Figure 81: Attitudes regarding kitchens, by target group, Cost-conscious Kitchens, JULY 2016

Who are they?

About their kitchens

What influences their choice of retailer?

Figure 82: Factors influencing choice of retailer for kitchen refits, by Target groups, cost-conscious kitchens, July 2016

Marketing analysis

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast Methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com