

# Kitchens and Kitchen Furniture - UK - September 2014

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.



“To succeed in tomorrow’s tough trading environment, kitchen retailers will need to continue to invest in showroom displays in order to keep ahead of the competition. Retailers will increasingly recognise the importance of a great showroom environment to give people ideas about how to create an attractive and practical kitchen.”

– Jane Westgarth, Senior Retail Analyst

## This report looks at the following areas:

- Will more fitted kitchen purchases go online?
- How price sensitive are people when they refit a kitchen?
- What role does planning play in influencing where people buy kitchens?

After several years of flat demand, more households are revamping their kitchens. The stimulus is helped by growing consumer confidence and a strengthening economy. The housing market began to pick up momentum in 2012 and 2013-14 has seen a return to boom conditions for London and the South East, as well as a revival in some other parts of the UK. And when people move house, they are more inclined to refit their kitchens.

DIYers are in the minority when it comes to refitting a kitchen. These projects are large and complex and too much for many people to cope with. This report looks at the consumer base who have opted for DIY or fitters and examines who uses the services provided by the retailers themselves.

There have been sweeping changes among retailers in recent years. MFI, once the market leader, went out of business in 2008, and then the fourth-largest DIY chain, Focus DIY, closed in 2011. We also saw the kitchen specialist, Moben (part of Homeform Group) close in 2011. Howdens Joinery and Wren Living have stepped in to fill the gap created by MFI and other companies have also added kitchens and kitchen fitting to their product mix including John Lewis, Tesco and Next. Meanwhile B&Q, Homebase, IKEA and Wickes have all invested in better ranges, stronger branding and more comprehensive services in order to capture more of this market. The builders’ merchants are also improving showroom space and building their image with the consumer.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto: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 2014

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

### Introduction

Definitions  
Excluded  
Abbreviations

### Executive Summary

#### The market

Figure 1: Consumer spending on kitchens and kitchen furniture, 2009-19

Figure 2: Consumer spending on kitchens and kitchen furniture, by segment, at current prices, 2014 (est)

#### Market factors

##### People love to cook

##### Age of kitchens in England and Wales

Figure 3: Average age of fitted kitchens, owner-occupied dwellings, England and Wales, 2001 and 2011

##### 65% of dwelling are owned

Figure 4: Types of housing in England and Wales, 2012

##### 15% more homes sold in 2013

Figure 5: UK property transactions, annual, 2006-13

#### Companies, brands and innovation

Figure 6: Distribution of kitchen furniture by major channel, 2013

#### The consumer

Figure 7: Kitchens and eating arrangements, June 2014

Figure 8: Refitting kitchens in the last three years, July 2013 and June 2014

Figure 9: Who refitted the kitchen in the last three years, July 2013 and June 2014

Figure 10: Spend on kitchen refits, by price band, cupboards and fitting services, in the last three years, June 2014

Figure 11: The customer journey, June 2014

Figure 12: Where they bought kitchen fittings, July 2013 and June 2014

Figure 13: Factors influencing choice of retailer/supplier of kitchen furniture, June 2014

#### What we think

### Trend Application

Trend: Minimise Me

Trend: Human

Trend: Survival Skills

### Issues and Insights

Will more fitted kitchen purchases go online?

The facts

The implications

How price sensitive are people when they refit a kitchen?

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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.

The facts

The implications

What role does planning play in influencing where people buy kitchens?

The facts

The implications

## Internal Market Environment

Key points

Kitchens are newer

Figure 14: Average age of fitted kitchens, owner-occupied dwellings, England and Wales, 2001 and 2011

Figure 15: Average age of fitted kitchens by household tenure, England and Wales, 2001 and 2011

A nation of cooks

Figure 16: Cooking and eating habits, May 2014

Baking is popular

Entertaining at home

Figure 17: Agreement with statements on eating/drinking occasions in the home, December 2011

## Broader Market Environment

Key points

Housing stock by tenure, England and Wales

Figure 18: Types of housing in England and Wales, 2012

House moves by tenure

Figure 19: Recent house moves, England, by household tenure, 2009-13

Uplift in property transactions

Figure 20: UK property transactions, annual, 2006-13

Figure 21: UK property transactions, monthly, February 2013-July 2014

London house prices rise fastest

Figure 22: Change in average house prices, by region, June 2012- June 2014

Multi-generation homes

Figure 23: Percentage of men and women aged 20-34 living with parents by age, UK, 2013

Renters move more often than home owners

Figure 24: Length of time in current home, England and Wales, 2012-13

Seven in ten have a smart phone

Figure 25: Technology products owned, January 2012-April 2014

Demographic changes

## Competitive Context

Key points

Consumer spend on selected home goods

Figure 26: Consumer spending on selected categories for the home, 2009-13

Figure 27: Consumer spending on selected categories for the home, 2009-13 (continued)

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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.

## Strengths and Weaknesses in the Market

Strengths

Weaknesses

## Market Size and Forecast

Key points

Market returns to growth

Figure 28: Consumer spending on kitchens and kitchen furniture, at current and constant 2014 prices, 2009-19

What consumers spend on kitchens

Figure 29: Consumer spending on kitchens and kitchen furniture, at current prices, 2009-19

Segmentation

Figure 30: Consumer spending on kitchens and kitchen furniture, by segment, at current prices, 2014 (est)

## Who's Innovating?

Key points

IKEA relaunches kitchens

Symphony expands into the living room

Benchmark narrowing ranges

B&Q, Tesco and John Lewis involved in industry standards for installation

Hygena roll out for Homebase

Grafton Group launches Bohem showrooms

Xey re-enters UK market

John Lewis launches flagship

Mobalpa opens in the UK

## Companies and Products

Figure 31: Major kitchen furniture suppliers, turnover, summary 2008-13

Alno (UK)

Figure 32: Alno UK company financials, 2008-12

Gower (Nobia)

Figure 33: Nobia Holdings UK Ltd, company financials, 2009-12

Mereway Kitchens

Figure 34: Mereway Kitchens company financials, 2009-13

Moore's Furniture Group

Figure 35: Moore's furniture group financial data, 2008-12

Omega

Figure 36: Omega financial data, 2009-13

Symphony

Figure 37: Symphony Group financial data, 2009-13

Other

## Channels of Distribution

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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.

## Key points

### Distribution of kitchens

Figure 38: Distribution of kitchen furniture, by major channel, 2013

Figure 39: Distribution of kitchen furniture, by major channel, 2009-13

### Changing retail scene

#### Online selling of kitchens

#### Kitchen retailers

Nobia Group (Magnet, Gower and Poggenpohl)

### Background and financial performance

Figure 40: Nobia UK financial information, 2008-12

Figure 41: Nobia Group UK outlets, July 2013 and August 2014

### Product range

#### Innovation and marketing

Figure 42: Magnet, Coffee Unit, 2014

### Howdens Joinery

### Background and financial information

Figure 43: Howdens Joinery Plc financial information, 2009-13

### Product range

#### Innovation and marketing

#### Kingfisher (B&Q and Screwfix)

### Background and financial performance

Figure 44: B&Q UK & Ireland and Screwfix UK financial information, 2010-14

Figure 45: B&Q UK & Ireland and Screwfix outlet numbers, 2010-14

### Product range

#### Innovation and marketing

#### Homebase

### Background and financial performance

Figure 46: Homebase financial data, 2010-14

### Product range

#### Innovation and marketing

#### Travis Perkins (Wickes and Benchmarx)

### Background and financial performance

Figure 47: Travis Perkins Plc company financials, 2009-13

Figure 48: Travis Perkins Plc, selected outlet numbers, 2009-13

#### Product range – Wickes

#### Product range – Travis Perkins

#### Innovation and marketing

#### IKEA

### Background and financial performance

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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 49: IKEA UK company financial performance, 2009-13

Product range

Innovation and marketing

Wren Living

Figure 50: Wren company financial performance, 2010-12

Canburg (Smallbone of Devizes, Mark Wilkinson Furniture and Brookmans)

Fired Earth

In-toto Kitchens

Harvey Jones

Betta Living

John Lewis

Jewson

Buildbase

Next

Argos

Tesco

Marks & Spencer

Other suppliers of fitted kitchens

Other companies

## Brand Communication and Promotion

Key points

Advertising expenditure falls

Figure 51: Topline advertising expenditure on Kitchen Furniture, 2010-13

Wickes is the largest spender

Figure 52: Advertising expenditure on kitchen furniture, by top ten retailers, 2013

Comparing 2012 and 2013

Figure 53: Advertising expenditure on kitchen furniture, top seven retailers, 2012 and 2013

The story so far in 2014

Figure 54: Advertising expenditure on kitchen furniture, Jan-June 2013 and 2014

Advertising expenditure by month

Figure 55: Advertising expenditure on kitchen furniture, by month, 2012 and 2013

Press remains the medium of choice

Figure 56: Advertising expenditure on kitchen furniture, by media type, 2013

Celebrity kitchens

## The Consumer – Types of Kitchen in Their Homes

Key points

Types of kitchen

Figure 57: Households with a separate utility room, by socio-economic group, income and household tenure, June 2014

Types of appliances in the kitchen

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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 58: Arrangement of kitchen appliances, July 2013 and June 2014

## Dining in the kitchen

Figure 59: Arrangement of eating areas and kitchens, July 2013 and June 2014

## The Consumer – Kitchen Refurbishment

### Key points

Figure 60: Refitting kitchens in the last three years, July 2013 and June 2014

Better-off households fit kitchens

People are over-optimistic about future plans

Are women more cautious about finances?

Repairing and not replacing

88% of ABs have their kitchens fitted for them

Figure 61: Who refitted the kitchen in the last three years, July 2013 and June 2014

Figure 62: Spend on kitchen refits, by price band, kitchen cupboards and fittings, in the last three years, July 2013 and June 2014

Figure 63: Spend on kitchen refits, by price band, cupboards and fitting services, in the last three years, June 2014

## The Consumer – The Customer Journey

### Key points

#### The customer journey

Figure 64: The customer journey, June 2014

40% looked at websites

Few take note of peer and expert reviews

33% looked through brochures

Women most inclined to talk to people they know

44% visited shops and stores

People restrict the number of stores they use

15% make detailed plans with more than one retailer

10% use an online planner

## The Consumer – Where They Bought Kitchen Furniture

### Key points

#### Where they bought kitchen furniture

Figure 65: Where they bought kitchen fittings, July 2013 and June 2014

More than half of under-54s used a DIY store

## The Consumer – Factors Influencing Choice of Retailer/Supplier of Kitchen Furniture

### Key points

#### Factors influencing choice of retailer/supplier

Figure 66: Factors influencing choice of retailer/supplier of kitchen furniture, June 2014

Brand matters more to purchasers

People make a difference

Quality for the price

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - September 2014

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.

Under one roof

Wide range

Online shopping and browsing

## Appendix – Market Environment

Figure 67: UK households, by size, 2008-18

Figure 68: Trends in the age structure of the UK population, 2009-19

## Appendix – The Consumer – Types of Kitchen in Their Homes

Figure 69: Kitchens and utility rooms in the UK's homes, by demographics, June 2014

Figure 70: Types of appliances in the kitchen and utility room, by demographics, June 2014

Figure 71: Arrangement of kitchen and eating areas in the home, by demographics, June 2014

## Appendix – The Consumer – Kitchen Refurbishment

Figure 72: Kitchen refurbishment, by demographics, June 2014

Figure 73: Use of fitters and DIY kitchen refits, by demographics, June 2014

## Appendix – The Consumer – What They Spent on Kitchen Refits

Figure 74: What they spent on kitchen refits, up to £1,000 – Kitchen cupboards and fittings, by demographics, June 2014

Figure 75: What they spent on kitchen refits, £1,000-£4,000 – Kitchen cupboards and fittings, by demographics, June 2014

Figure 76: What they spent on kitchen refits, £4,000-10,000+ – Kitchen cupboards and fittings, by demographics, June 2014

Figure 77: What they spent on installation, nothing to £1,000, by demographics, June 2014

Figure 78: What they spent on Installation, £1,000-4,000, by demographics, June 2014

Figure 79: What they spent on Installation, £4,000-£10,000+, by demographics, June 2014

## Appendix – The Consumer – The Customer Journey

Figure 80: The customer journey, top five responses, by demographics, June 2014

Figure 81: The customer journey, next five responses, by demographics, June 2014

Figure 82: The customer journey, last three responses and don't know, by demographics, June 2014

## Appendix – The Consumer – Where They Bought Kitchen Furniture

Figure 83: Where they bought kitchen furniture, by demographics, June 2014

Figure 84: Where they bought kitchen furniture, by demographics, June 2014 (continued)

Figure 85: Where they bought kitchen furniture, by demographics, June 2014 (continued)

## Appendix – The Consumer – Factors Influencing Choice of Retailer/Supplier of Kitchen Furniture

Figure 86: Most popular factors influencing choice of retailer/supplier of kitchen furniture, by demographics, June 2014

Figure 87: Next most popular factors influencing choice of retailer/supplier of kitchen furniture, by demographics, June 2014

Figure 88: Other factors influencing choice of retailer/supplier of kitchen furniture, by demographics, June 2014

Repertoire of factors influencing choice of retailer/supplier of kitchen furniture

Figure 89: Repertoire of factors influencing choice of retailer/supplier of kitchen furniture, by demographics, June 2014

## Appendix – The Consumer – Factors That Would Influence Choice of Retailer

Figure 90: Most popular factors that would influence choice of retailer, by demographics, June 2014

Figure 91: Next most popular factors that would influence choice of retailer, by demographics, June 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)



## Kitchens and Kitchen Furniture - UK - September 2014

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 92: Other factors that would influence choice of retailer, by demographics, June 2014

Repertoire of factors that would influence choice of retailer

Figure 93: Repertoire of factors that would influence choice of retailer, by demographics, June 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)