

## Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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



“Kitchens have become a home hub, used for cooking, eating, leisure activities and entertaining. This is driving a fashion for larger kitchens, often combined with eating areas, seating and patio doors opening to the garden. Consequently, households will invest to create a stylish room, enhanced with lighting, decorative touches and plenty of storage options.”

– Jane Westgarth, Senior Market Analyst

This report looks at the following areas:

- Bunnings has decided to stop fitting kitchens, preferring a simpler trading model
- The kitchen has become a home hub, where space allows
- Are Smart Home developments influencing expectations of kitchens?

There are several key trends at play. The shift into urban living is leading to many homes having smaller kitchen spaces which, in turn drives demand for innovative storage solutions, minimal lines and room layouts. Countering this there is a fashion for open plan living, with various combinations of kitchens, dining areas and living spaces, in turn raising demand for built-in appliances, as these give kitchens a sleeker, tidier appearance. Also, some households extend when possible, by knocking through or building extensions, creating larger kitchens – a trend particularly evident at the high end of the market. While kitchen styling evolves slowly, more makers are focussing efforts on the interiors of cupboards and drawers. Demand for kitchens is closely linked to the housing market – people are more likely to refurbish a kitchen in the five years after moving house than at any other time. The housing market was buoyant up until 2016, when the combined effects of changed stamp duties and the aftermath of the Brexit vote led to a rush to get ahead of the new tax rates, followed by a cooling of demand. 2017-18 is likely to see slower housing sales and this will have a knock-on effect to demand for kitchens.

**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

China  
+86 (21) 6032 7300

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 - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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  
Figure 1: Consumer spending on kitchens, 2012-22

Changing structure of the housing market  
The kitchen as a home hub  
Cooking from scratch  
Chargers for personal technology  
Companies, brands and innovation  
Competition growing in kitchen retailing  
Figure 2: Distribution of consumer spend on kitchens, by value, 2017 (est)

Innovation continues to redefine the kitchen  
Augmented reality will continue to develop  
The consumer  
29% of ABs have a separate utility room  
Figure 3: Kitchens and utility rooms in the UK's homes, August 2017

54% of kitchens have at least one built-in appliance  
Figure 4: Appliances in the UK's kitchens, free-standing/built-in, August 2017

32% of kitchens have a seating area  
Figure 5: Kitchens and dining areas in the UK's homes, August 2017

4.2 million kitchen refits in the last three years  
Figure 6: Kitchens and utility rooms refitted or repaired, August 2017

Flooring and wall coverings included in 60% of revamps  
Figure 7: What was included in the kitchen/utility room refit? August 2017.

Updating style and improving layout are key reasons for a new kitchen  
Figure 8: Reasons for refitting the kitchen, August 2017

Cabinets and worktops account for 41% of spend on the refit  
Figure 9: Amount spent on kitchen refits, August 2017

B&Q is the most-used retailer for kitchens  
Figure 10: Retailers/suppliers used for kitchens, August 2017

Wide choice is the greatest influence on shoppers  
Figure 11: Reasons for choice of retailer/supplier, August 2017

51% of non-buyers would be influenced by a complete fitting service  
Figure 12: Factors influencing choice of retailer/supplier, August 2017

People prioritise work surfaces and extra storage fittings

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 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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

Figure 13: Attitudes regarding kitchens, August 2017

What we think

## Issues and Insights

Bunnings has decided to stop fitting kitchens, preferring a simpler trading model

The facts

The implications

The kitchen has become a home hub, where space allows

The facts

The implications

Are Smart Home developments influencing expectations of kitchens?

The facts

The implications

## The Market – What You Need to Know

Market up 4% in 2017

Neutral colours dominate styling

Demand for kitchens is influenced by the housing market

Variety of influences shaping demand for kitchens

Competition among retailers intensifies

Online market share reaches 8.5% by value

## Market Size and Forecast

2017 sees kitchen market weakening

Figure 14: Consumer spending on kitchens, 2012-22

Figure 15: Consumer spending on kitchens, 2012-22

Forecast methodology

## Market Segmentation

Kitchens too pricey to take risks with

Surface textures

Cabinets make up over half of kitchen spend

Figure 16: Market for kitchens, by segment, 2017 (est)

The kitchen as a living space

Connecting up to the internet

Redundancy of electronics

Instant hot water

Innovative storage

## Market Drivers

Demand for kitchens closely linked to house moves

Figure 17: Housing transactions, UK, March 2016-August 2017

Do people 'improve not move' when the housing market slows down?

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Kitchens and Kitchen Furniture - UK - October 2017

**Report Price:** £1995.00 | \$2672.70 | €2262.13

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

Fall in proportion of homes with a mortgage

Figure 18: Housing tenure, UK, 2011-15

28% of 25-34s rent from private landlords

Figure 19: Housing tenure, UK, by age, 2017

Home improvements

More time spent in the kitchen

Figure 20: Reasons for spending on the home, November 2016

Cooking from scratch

Figure 21: Frequency of cooking in the home, by type of meal, February 2016

The convenience of prepared foods

Figure 22: Frequency of cooking in the home, meals cooked completely from scratch, February 2016

Chargers for personal technology

Figure 23: Personal ownership of consumer technology products, April 2017

## Channels to Market

Competition growing in kitchen retailing

Figure 24: Distribution of consumer spend on kitchens, by value, 2017 (est)

Internet marketing is an integral part of the retail offer

Online market share reaches 8.5% by value

Huge array of kitchens online

## Companies and Brands – What You Need to Know

Wren is the fastest growing kitchen chain

B&Q's turnover down because of store closures

Bunnings simplifies its offer, closing the fitting service

IKEA set to build market share in the UK

Howdens is a builder-only seller of kitchens

Premium kitchen retailers performing well

Nobia is the largest kitchen specialist

Retailers are catering for changing kitchen trends

Full-service is a key factor in the marketing mix

Bathstore enters the market for kitchens

Variety of innovative product launches

High level of kitchen advertising sustained

## Retailers

Leading kitchen retailers

Wren's rapid growth

Bunnings simplifies its offer, closing the fitting service

IKEA determined to build market share in the UK

Turnover performance of the leading retailers

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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

Figure 25: Leading kitchen retailers, total company turnover, (excluding VAT), 2012-16

Operating profit of the leading retailers

Figure 26: Leading kitchen retailers, operating profit, (excluding vat), 2012-16

Howdens has enviable operating margins

Figure 27: Leading kitchen retailers, operating margin, 2012-16

B&Q and Homebase cut back on excess space

Figure 28: Leading kitchen retailers, stores, 2012-16

Wren's turnover per outlet boosted by larger showrooms and broader ranges

Figure 29: Leading kitchen retailers, turnover per store, 2012-16

Smaller kitchen retailers

Commercialising bespoke kitchens

Luxury kitchen businesses

Neptune has expanded into Europe and Asia

Canburg serves the contract and retail markets

Figure 30: Selected kitchen specialists, turnover (excluding VAT), 2012-16

Volatile profits

Figure 31: selected kitchen specialists, operating profit, 2012-16

Wide variation in profitability

Figure 32: Selected kitchen specialists, operating margin, 2012-16

Harvey Jones building productivity

Figure 33: Selected kitchen specialists, stores, 2012-16

New stores take a while to reach maturity

Figure 34: Selected kitchen specialists, turnover per store, 2012-16

Other kitchen specialists

## Suppliers

Alno enters administration

Other German kitchen suppliers

Nobia is a major UK supplier

Waterline Kitchens is a major brand for independents

End of Four Seasons

Omega Kitchens works with George Clark

Symphony continues its track record of strong growth

Masterclass Kitchens focuses on retailers

Figure 35: Suppliers of kitchen furniture, turnover, 2011-16

## Competitive Strategies

Catering for changing kitchen trends

Figure 36: Example of innovative kitchen styling, Wickes, 2017

Full-service is a key factor in the marketing mix

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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

## Launch Activity and Innovation

Bathstore enters the market for kitchens

Figure 37: Bathstore store signage incorporating haus, 2017

IKEA launches door fronts made from recycled plastic bottles

Kitchens combine function with style

Figure 38: Elica, Nikolatesla combined hob and extractor, 2017

Figure 39: Siemens InductionAir system, 2017

New technology for work surfaces repels liquid

Figure 40: Material that repels liquids, 2017

Multi-function furniture for cooking and dining

Figure 41: Dining table with integrated cooking function, Discala, 2017

Quooker develops the Flex tap

Figure 42: Quooker Flex tap, 2017

Augmented reality will continue to develop

## Advertising and Marketing Activity

High level of kitchen advertising sustained

Figure 43: Total above-the-line, online display and direct mail advertising expenditure on kitchens, 2013-16

Wickes remains the largest advertiser of kitchens

Figure 44: Top ten advertisers, kitchens, 2016

Wickes has increased advertising spend for three years running

Figure 45: Top ten advertisers, kitchens, 2013-16

Television advertising takes over half of media spend

Figure 46: Advertising, kitchens, by media, 2016

Wren's advert banned by the ASA

Nielsen Ad Intel coverage

## The Consumer – What You Need to Know

29% of ABs have a separate utility room

Seating areas and open-plan living

4.2 million kitchen refits in the last three years

Updating style and improving layout are key reasons for a new kitchen

Cabinets and worktops account for 41% of spend on the refit

B&Q is the most-used retailer for kitchens

Wide choice is the greatest influence on shoppers

People prioritise work surfaces and extra storage fittings

## Kitchens and Utility Rooms in the UK's Homes

29% of ABs have a separate utility room

Figure 47: Kitchens and utility rooms in the UK's homes, August 2017

54% of kitchens have at least one built-in appliance

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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

Figure 48: Appliances in the UK's kitchens, free-standing/built-in, August 2017

## Kitchens and Dining Areas in the UK's Homes

32% of kitchens have a seating area

Figure 49: Kitchens and dining areas in the UK's homes, August 2017

## Kitchens Revamped in the Last Three Years

4.2 million kitchen refits in the last three years

Figure 50: Kitchens and utility rooms refitted or repaired, August 2017

## Details of Kitchen and Utility Room Refits

Flooring and wall coverings included in 60% of revamps

Figure 51: What was included in the kitchen/utility room refit, August 2017

## Reasons for Refitting the Kitchen

Updating style and layout are key reasons for a new kitchen

Storage is a key selling point

Figure 52: Reasons for refitting the kitchen, August 2017

## Amount Spent on Kitchen Refits

Cabinets and worktops account for 41% of spend on the refit

Figure 53: Amount spent on kitchen refits, August 2017

## Retailers or Suppliers Used for Kitchens

B&Q is the most-used retailer for kitchens

Bunnings is opting out of kitchen fitting services

IKEA used by 12% of kitchen purchasers

Wren is building a strong presence

Figure 54: Retailers/suppliers used for kitchens, August 2017

## Reasons for Choice of Retailer or Supplier for Kitchens

Wide choice is the greatest influence on shoppers

The people make a difference

Showrooms highly relevant

Planning without help

Figure 55: Reasons for choice of retailer/supplier, August 2017

## Factors Influencing Choice of Retailer or Supplier

51% of non-buyers would be influenced by a complete fitting service

Figure 56: Factors influencing choice of retailer/supplier, August 2017

## Attitudes Regarding Kitchens

Freeing up the work surfaces

Storage is a must

Kitchens as a home hub

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Kitchens and Kitchen Furniture - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

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

Kitchens as an investment

Weakening consumer confidence can make people delay

Figure 57: Attitudes regarding kitchens, August 2017

## 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](http://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](mailto:reports@mintel.com)