EU MARKET SURVEY 2002

DOMESTIC FURNITURE

VOLUME II

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

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DOMESTIC FURNITURE

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REPORT SUMMARY

This survey profiles the EU market for domestic or household furniture. It emphasises those items which are relevant to exporters from developing countries and highlights six selected markets within the EU. Up-to-date information is given on consumption, production, imports/exports, trade structure, prices and margins of furniture. The appendices at the end of the survey include contact details of importers, trade associations and other relevant organisations.

As an exporter, you need this information to formulate your own marketing strategies and successfully penetrate the EU market. To assist you here, CBI has developed a matching EU Strategic Marketing Guide “Domestic furniture” (2000). This practical handbook provides relevance on quality standards and on dealings with prospective buyers. The second part of the guide gives a methodology of analysis and ready-to-fill-in frameworks, which can be completed by using the information in this EU Market Survey.

The furniture items covered are made of wood, metal, iron, plastic/synthetic material, glass, cane, osier, bamboo, other materials or a combination of different materials. Furniture can be sub-divided into:

Furniture by function:
- Upholstered seating
- Non-upholstered seating
- Dining and living room furniture
- Kitchen furniture
- Bedroom furniture
- Home office furniture
- Other furniture and parts

Furniture by style:
- Classic
- Colonial
- Rustic/country
- Contemporary
- Modern/avant garde

Consumption

Total furniture retail sales in the EU was estimated at US$ 65,958 (or € 71,693) million in 2000, being the largest market for furniture in the world, followed by the USA. The average EU consumption per capita was US$ 174, with people in Austria and Scandinavian countries spending more on furniture than other EU countries. In the late 1990s, EU furniture retail sales rose steadily and was driven by a growing world economy and by the influence of fashion in home interiors.

From 2000 onwards, inflation and the introduction of the Euro pushed up prices, especially those of housing. The recession in the USA and Germany in 2001 has affected other EU countries as well, which was followed by a waning consumer confidence and declining disposable income. These major developments resulted in static furniture sales in the EU, with a decreasing tendency in 2002.

The selected countries in this survey are Germany, Italy, France, United Kingdom, Spain and The Netherlands, which are the largest EU furniture markets. In 2000, they accounted for nearly 80% of total EU furniture retail sales, representing a value of US$ 51,888 (or € 56,402) million.

Dining and living room furniture was the largest product group and accounted in 2000 for 23% of total furniture sales, valued at US$ 11,788 (or € 12,849) million. Bedroom, non-upholstered, other furniture and parts form large categories, which are relevant to exporters. There is more innovation in furniture items and in functions. Products are lighter, well designed, moveable (on wheels) and more receptive to new technologies. The future EU furniture market is expected to polarise into a low quality/price and a higher quality/price segment, which will be driven by:

Future market drivers for furniture:
- → Intensified competition with cheaper imported furniture.
- → More demand for combination units (display shelves).
- → People continuing to create their own combinations of furniture.
- → People looking for dual-purpose furniture, as space gets limited.
- → More demand by single households and the 45+ generation.
- → Working from home, with more demand for SOHO furniture.
- → The origin and age of wood, which becomes more important.

Production

In 2000, the turnover of the 88,500 EU furniture manufacturers was US$ 67,578 (or € 73,662) million, of which an estimated three-quarters was wooden furniture. The EU furniture sector accounted for around 45% of total world furniture production and has a long tradition, with mostly small-scale family owned manufacturers.
In the EU, there are 50 groups of larger companies with a turnover over US$ 100 million. The majority of these companies specialise in the production of one or two types of furniture, except the few large multi-product enterprises such as the German *Schieder, Welle* and the French *Parisot*. Italy, United Kingdom, Denmark and Belgium are large manufacturing countries of upholstered furniture, while the largest EU manufacturer, Germany produces much kitchen furniture.

Imports

The EU is the leading importer of furniture in the world and, in 2000, accounted for around 50% of total world imports, or 7,232 thousand tonnes with a value of US$ 19,434 (or € 21,124) million. Germany imports more than one quarter (28%) of all EU imports and is followed by France (15%) and The United Kingdom (14%). Between 1998 and 2000, all countries in the EU increased their imports of furniture, especially in terms of volume (+30%). This was mainly due to the strength of the US dollar and falling values for EU imports because of lower prices of most furniture items.

Product groups

Major product groups: *Dining and living, upholstered* and *non-upholstered furniture* together formed more than one third (38%) of total EU imports in 2000. The category *other furniture* is a sizeable product group, which grew fast recently and accounted in 2000 for 18% of the value of EU imports. The largest category is *furniture parts*, which represented almost one third of EU imports.

Raw materials: Wooden furniture accounted for nearly three-quarters of EU imports in 2000, while imports of metal chairs and tables have grown in importance in the past few years.

Main supplying countries

Intra-EU supplying countries: In 2000, around 55% of EU imports came from other EU countries with Italy representing 27% of total Intra-EU furniture supplies, followed by Germany (23%).

Eastern European countries: These countries expanded their exports to the EU very rapidly in the past decade, which is likely to grow further after the introduction of the Euro. In 2000, EU imports from these countries together, valued US$ 3,993 (or € 4,340) million, or 20% of the EU total. Next to imports of low priced furniture, German manufacturers have furniture of higher quality woods produced here. Especially in Poland, which accounted in 2000 for 8% of total EU imports. Other important countries, increasing their supplies to the EU were: Czech Republic, Slovenia, Romania, Hungary, Slovakia and Lithuania.

Developing countries

In 2000, EU furniture imports from developing countries was 1,362 thousand tonnes, representing a value of US$ 3,875 (or € 4,212) million, a 58% volume increase over 1998. Around 75% is sourced from Asia with rising tendencies in most countries. Particularly China and Malaysia increased their exports especially of dining and living, non-upholstered and other furniture.

In 2000, imports from China reached a value of US$ 855 (or € 929) million and have doubled both in value and volume terms between 1998 and 2000. Supplies from Indonesia, Malaysia, Vietnam and Thailand showed a similar trend. Most of these countries were able to benefit from the devaluation of their currencies relative to those in Europe, which resulted in lower prices for EU importers, especially in the UK (strong Pound). Other countries which increased their supplies, between 1998 and 2000, to the EU were: India (+69% in volume terms), Brazil (+59%), Argentina (+322%), Bolivia (+40%), South Africa (+27%), Turkey (+68%), Morocco (+115%) and Egypt (+42%).

Trade channels

Most furniture is supplied from manufacturers through importers/wholesalers or direct to consumers by the large retailers. In 2000, there were around 80,000 furniture retail companies in the selected EU countries, employing 400,000 people. In the same year, the share of EU furniture retail sales accounted for by *specialists* averaged 78%. Small furniture shops are still strongly represented in Italy and Spain and most of them are not organised. Another furniture specialist's category were, franchised and chain store operations, which are dominant in France and United Kingdom. In the EU, the top 50 furniture retailers controls 42% of the total market, most of which were chain or franchised stores (IKEA, MFI, Conforama etc.). Many of these stores have their own purchasing staff, buying from all over the world.

Buying groups are important in Germany and The Netherlands, with smaller specialised shops. Sometimes these shops are housed in large *interior shopping malls* at out-of-town centres. Although recently, shopping malls suffered from the recession and competition from discounters, non-specialists e.g. DIY, department stores, hypermarkets or clothing stores (UK). Specialist retailers also suffered from, manufacturers increasingly selling directly to consumers by opening up *single brand stores* (e.g. *Capellini* or *Leolux*), *factory outlets* or franchised operations (e.g. *Divani & Divani* by Natuzzi).

Opportunities for exporters

As the EU furniture market declined since 2001, exporters should seek opportunities in growing niches:

- ***Ethnic furniture*** in styles ranging from classic, contemporary or modern rustic. It is important that furniture conveys its authenticity by special materials, designs, skills in craftsmanship or in finish.
- ***Colonial furniture*** with luxury items in darker wood (wengé, mahogany or cherry) more popular.
- ***Rattan furniture*** is frequently combined with wooden tables in contemporary or rustic style furniture. A niche market developed for furniture of fine wickerwork rattan, mixed with metal.
- ***Home office furniture***, where items should be practical, multi-functional and up-to-date.
- ***Children's furniture***, multi-functional and modular items with safety standards being important.
- ***Solid woods*** similar to light oak, cherry or darker woods became popular, instead of veneers
- ***Special natural materials*** could be: rose oak, eucalyptus, palm fibre, bark, midribs, rice husk, seagrass, nutshells, parts of banana trees, water hyacinth, canvas, cork or abacca leave.
- ***RTA***: The quality and diversity in design of RTA furniture is increasing.
- ***Specific target groups***: such as furniture for seniors or for the growing number of single households.
- ***Accessories***, which could range from fruit bowls, candle holders, vases, flower pots, lampshades, storage boxes etc. Wicker or bamboo baskets or cane mats are popular in bedrooms or bathrooms.
- ***Sub-contracting***, as EU manufacturers look for new low-cost countries to outsource production.

Requirements and difficulties for exporters

- In order to approach the low and medium end of the market, competitive prices are necessary.
- Fast delivery (according to sample), good packaging, and after-sales service are required.
- Innovations are required to keep the interest of consumers, who are more demanding.
- As trends in home interiors change faster, it is difficult to start a long-term investment.
- Avoid using wood of (too) young trees, resulting in warped furniture that cannot be sold.

Further market research

This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read the survey and filled in the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.

Market research depends on *secondary data* (data that has already been compiled and published) and *primary data* (information that you collect yourself). An example of secondary data is this EU Market Survey. Primary data is needed when secondary data is not sufficient for your needs as, for example, when you are researching which type of consumer will be interested in your specific product.

Sources of information include (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, along with shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you collected your information you should analyse the information. In order to judge the attractiveness of a market, you should develop a classification or score system.

For more detailed information on market research reference is made to *CBI's Export Planner (2000)*.

1 PRODUCT CHARACTERISTICS

1.1 Product groups

The products covered in this survey are domestic or household furniture, both in finished and semi-finished form. It specifically excludes the contract sector, which includes furniture for civil aviation, offices, hospitals, schools, hotels and other similar purposes. Antique and other second-hand furniture have been excluded as well. The same applies to garden furniture, which is covered in the EU Market Survey "Garden decoration articles". Other furniture-related products can be found in the survey "Timber and timber products".
Furniture is usually divided by function into the following major groups:

Product group	Most common items
• Upholstered seating	– Armchairs, reclining chairs, couches, sofas, divans, footstools, seating elements upholstered with leather, wool, synthetic material, cotton etc;
• Non-upholstered seating	– Seats, armchairs, rocking chairs, seats convertible into beds, stools;
• Dining and living room furniture	– Dining sets (tables and chairs), dressers, coffee tables, sideboards, shelve systems, room dividers, television/video/music system storage units;
• Kitchen furniture	– Fitted cabinets and kitchen units, kitchen tables and chairs, free-standing pieces such as movable trolleys and butcher blocks;
• Bedroom furniture	– Beds, headboards, bedside tables, dressing tables, chests of drawers, wardrobes (fitted or free-standing);
• Home office furniture	– Desks, chairs, drawer unit, filing cabinets, integrated workstations, also referred to as *SOHO* (Small Office Home Office);
• Other furniture	– *Cupboards, bookcases* and *wall units*, – *Occasional furniture* such as small tables, desks, mirrors, hall-stands, – *Bathroom furniture* such as storage cabinets, baskets etc.;
• Furniture parts	– Parts of furniture or seats, also including semi-finished furniture.

Furniture can be also defined by its raw material content or by style, as is shown below:

Furniture by raw material	Furniture by style
• Wood	• Classic
• Cane, osier, bamboo or similar material	• Colonial
• Metal	• Rustic / country
• Plastic / synthetic	• Contemporary
• Stone	• Modern / avant garde
• Glass	
• Combination of materials	

Although upholstered seating and kitchen furniture were growing segments in the EU furniture market, they are covered only briefly in this survey. Both segments are difficult to enter for exporters from developing countries. The supply is dominated by Italy and Germany, which can offer short lead times, good after sales service and are able to comply with the fast changes in designs. In addition, some EU countries, like the United Kingdom produce their own upholstered furniture and reduced imports because fire regulations have been more strict recently.

Kitchen furniture is often made in Eastern European countries and the competition is on price and on short lead times, especially in the low to medium end of the market. Most furniture items are made of capital-intensive material such as chipboard, plywood, multiplex and MDF (Medium Density Fibreboard), being produced in large volumes and at low cost.
In most EU countries, fitted kitchens became more common and nowadays newly built homes come complete with fitted kitchen and appliances.

The majority of furniture sold in the EU market is in ready-assembled form. On the other hand, from 1970 onwards the expansion of IKEA and other furniture chain stores (MFI, But) stimulated sales of furniture bought for self-assembly by the consumer.
This category is also referred to as *ready-to-assemble (RTA)* furniture, *flat-pack or take-away* furniture and is often contemporary style furniture. The single term "RTA furniture" will be used throughout this survey to describe this category.

1.2 Customs/statistical product classification

The classification system used for both Customs and statistical purposes in EU member countries is the Harmonised Commodity Description and Coding System (HS), which is used worldwide.

Table 1.1 gives a list of the main HS codes for furniture, most of which can be found in Chapter 94 of the Harmonised System. A more detailed list is given in Appendix 1. The categories "Other furniture" and "Parts", only differentiate between the materials used and not between the function of furniture items. This implies that garden furniture, which is not covered in this survey, is included in the HS Codes 9403 60900, 9401 90300 and 9403 90300, which may give a slight over-representation in trade statistics. The relevant HS code groups for furniture covered in this survey are:

Table 1.1 HS code classification of domestic furniture

HS Code	Product group
Upholstered	
9401 610 00	**Upholstered seats,** with wooden frames
9401 710 00	**Upholstered seats,** with metal frames
Non-upholstered	
9401 690 00	**Non-upholstered seats,** with wooden frames
9401 790 00	**Non-upholstered seats,** with metal frames
9401 400 00	**Seats,** convertible into beds
9401 800 00	**Seats,** other
Kitchen furniture	
9403 401 00	**Kitchen furniture,** built-in, of wood
9403 409 00	**Kitchen furniture,** other, of wood
Dining and living	
9403 600 10	**Dining and living room furniture,** excluding seats, of wood
Bedroom furniture	
9403 500 00	**Bedroom furniture,** of wood
9403 209 10	**Metal beds,** excluding for civil aircraft and hospitals etc.
Other furniture	
9403 609 00	**Other furniture,** of wood
9403 209 90	**Other furniture,** of metal
9403 709 00	**Other furniture,** of plastic, excluding seats
Rattan furniture	
9401 500 00	**Rattan seats,** of cane, osier, bamboo or similar materials
9403 800 00	**Rattan furniture,** of cane, osier, bamboo or similar materials
Parts	
9401 903 00	**Parts of seats,** of wood
9401 908 00	**Parts of seats,** of metal
9403 903 00	**Parts of furniture,** of wood
9403 901 00	**Parts of furniture,** of wood
9403 909 00	**Other parts of furniture**

2 INTRODUCTION TO THE EU MARKET

European Union
The European Union (EU) is the current name for the former European Community. Since January 1, 1995 the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of whom already have extensive trade and co-operation agreements with the EU. It is envisaged that five of these countries will become members in 2003.

Population
In 2001, the EU population totalled 379 million, which is around 3 times the Japanese and 1.4 times the US population. The population of the selected EU markets in this survey represents 314 million people with 124 million households. Germany has by far the largest population size, with 82.3 million people. The United Kingdom, Italy, and France each have around 58 million inhabitants. The densely populated areas in the EU are located in The Netherlands, Belgium, the Northwest of Germany, the Southwest of England and in northern Italy.

The unification process
The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in EU countries. As unification allows free movement of capital, goods, services and people, the internal borders have been removed and goods produced or imported into one member state can be moved around between the other member states without restrictions.

A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the EU is already a fact, regulations in member countries have not yet been harmonised. Work is in progress to create EU regulations in the fields of environmental pollution, health, safety, quality and education.

Size of the EU Economy
The EU is among the largest economies in the world. In 2001, the average GDP per capita amounted to US$ 23,358 (or € 25,953) and a total GDP of US$ 6,653 (or € 7,392) billion. Germany, France, United Kingdom and Italy together account for three-quarters of the EU total GDP. The 2001 figures of national statistic offices point to an average GDP growth in 2000 of 3.0% in the selected EU countries, with large growth in France, UK, Italy, Spain and The Netherlands, but with a slowdown in 2001, due to the economic recession following the attacks in the USA in September 2001.

Changeover to the Euro (€)
On January 1, 1999, the Euro (€) became the legal currency within 11 EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Circulation of Euro coins and banknotes started in January 1, 2002 and replaced national currency notes and coins, which were withdrawn in July 1, 2002.

Currencies used in this EU market survey
The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In previous years, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On January 1, 1999, statistical and contractual values in ECU were converted into Euros on a 1:1 exchange rate. *In 1999, the €/US$ exchange rate was US$ 1.06 for one € and in 2000 US$ 0.92 for one €, which are used in trade statistics in this market survey.* However in 2001, the value of the Euro fell to US$ 0.86 for one €, but regained in July 2002 an equal level (i.e. one € for one US$) since the US$ has weakened due to the recession in the USA.

In this market survey, the US$ is the basic currency unit used to indicate value. In trade statistics given in Appendix 2, the values for dates after January 1, 1999 are also expressed in €.

Exchange rates of EU currencies in US$

Country	Currency	1995	1996	1997	1998	1999	2000	2001
European Union	ECU / €	1.29	1.25	1.13	1.12	1.06	0.92	0.86
Denmark	Dkr	0.18	0.17	0.15	0.15	0.13	0.12	0.12
Sweden	Skr	0.14	0.15	0.13	0.13	0.12	0.11	0.09
United Kingdom	GB£	1.57	1.56	1.64	1.66	1.62	1.58	1.54

Source: CBS Statline (2002)

Trade statistics

Trade statistic quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on January 1, 1993. Until that date, trade was registered by means of compulsory customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case.

Statistical bodies such as Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, trade within the EU is generally underestimated.

On the other hand, figures for trade between the EU and the rest of the world (Extra-EU) are accurately registered and, therefore, more precisely represented in these statistics.

EU Market Survey - a brief introduction

This survey profiles the EU market for “Domestic furniture” in which six selected markets within the EU are highlighted. The countries selected for this survey are Germany, Italy, France, United Kingdom, Spain and The Netherlands, which are the largest consuming countries for furniture. In 2000, these countries together accounted for nearly 80% of total EU furniture consumption, in which Germany had the largest share. Italy is the second largest consumer and sets worldwide trends in furniture design. In 2000, the selected EU countries accounted for almost three-quarter of EU furniture imports, of which developing countries supplied 20% in volume terms.

The United Kingdom, France and The Netherlands play an important role in furniture trends with people who are more open to influences from other cultures and who tend to create more original home interiors. Spain has become a sizeable market for furniture and may offer opportunities for exporters from developing countries, especially because of its colonial links with supplying countries in Latin America and in The Philippines.

3 CONSUMPTION

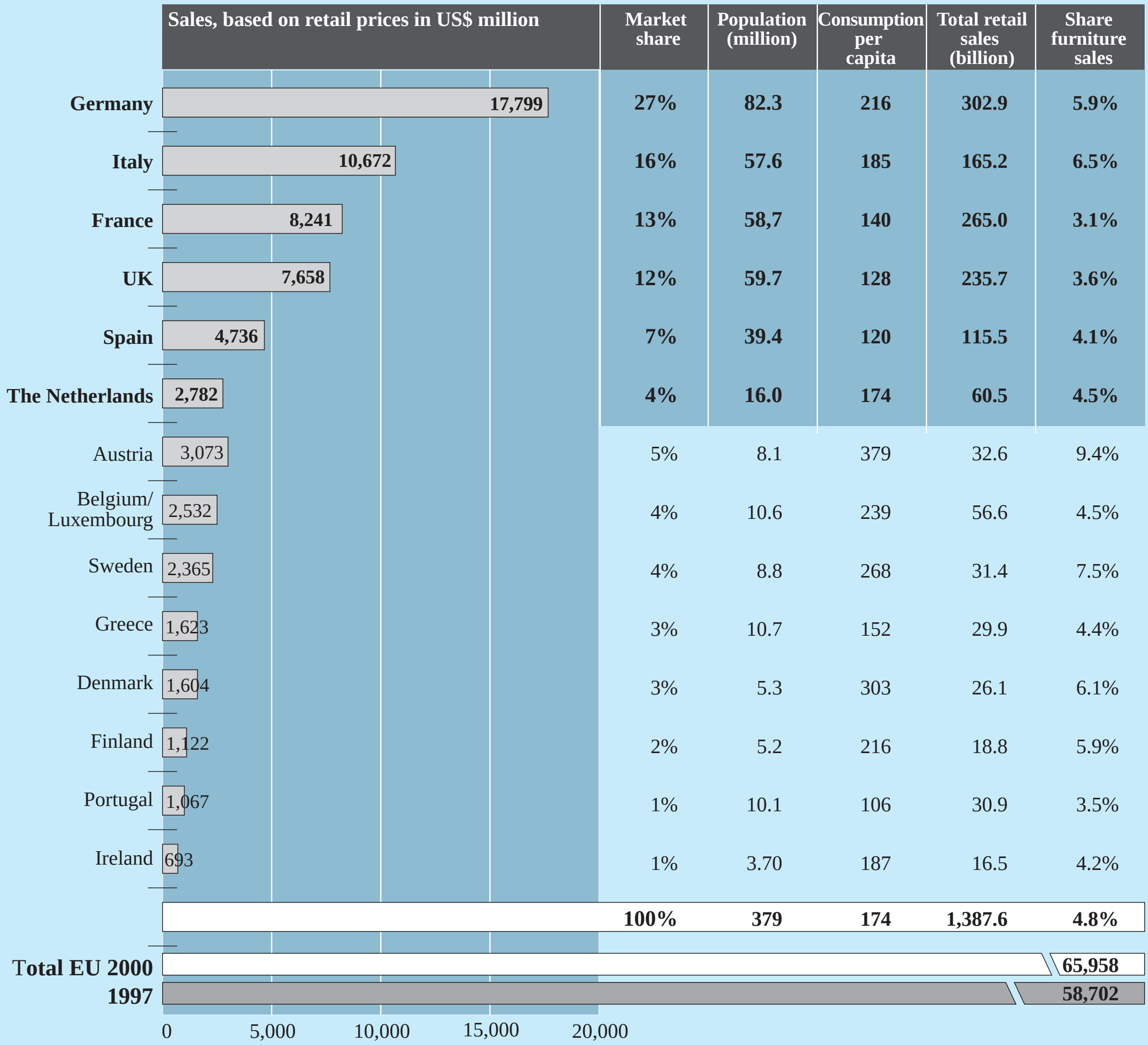
3.1 Market size

European Union
Total furniture retail sales in the EU member countries was estimated at US$ 65,958 (or € 71,693) million in 2000, of which US$ 51,888 (or € 56,402) million was achieved in the six selected countries. The EU is the largest market for furniture in the world, followed by the USA (US$46,404 million). As is shown in figure 3.1, Germany is still the largest EU furniture market and accounted for 27% of total EU furniture sales in 2000, followed in importance by Italy (16%).
The average EU consumption per capita was US$ 174 with people in Austria and Scandinavian countries spending more on furniture. This is also reflected in a higher share of furniture in total retail sales in those countries (see below).

Between 1997 and 2000, EU furniture retail sales rose by 11%, from US$ 58,702 to 65,958 million. From 2000 onwards, inflation throughout the EU has pushed up prices, particularly of housing. The recession in Germany, the USA has affected other EU countries as well, especially after the US attacks in 2001. Furniture sales in the EU remained static in 2001 and declined in 2002. The future market is expected to polarise into a low quality/price and a higher quality/price segment and will be driven by:

- Intensified competition at the lower price range with cheap, often hardwood, imported furniture.
- Increased demand for combination units, e.g. display shelves which are versatile and dual-purpose.
- People continue to create their own individual choice and style of furniture.

Figure 3.1 Consumption of furniture in EU markets, 2000



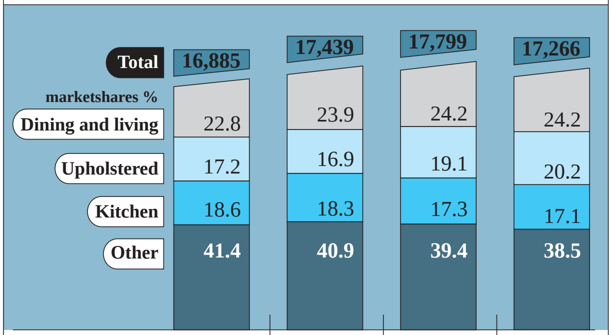
	Sales, based on retail prices in US$ million	Market share	Population (million)	Consumption per capita	Total retail sales (billion)	Share furniture sales
Germany	**17,799**	**27%**	**82.3**	**216**	**302.9**	**5.9%**
Italy	**10,672**	**16%**	**57.6**	**185**	**165.2**	**6.5%**
France	**8,241**	**13%**	**58,7**	**140**	**265.0**	**3.1%**
UK	**7,658**	**12%**	**59.7**	**128**	**235.7**	**3.6%**
Spain	**4,736**	**7%**	**39.4**	**120**	**115.5**	**4.1%**
The Netherlands	**2,782**	**4%**	**16.0**	**174**	**60.5**	**4.5%**
Austria	3,073	5%	8.1	379	32.6	9.4%
Belgium/ Luxembourg	2,532	4%	10.6	239	56.6	4.5%
Sweden	2,365	4%	8.8	268	31.4	7.5%
Greece	1,623	3%	10.7	152	29.9	4.4%
Denmark	1,604	3%	5.3	303	26.1	6.1%
Finland	1,122	2%	5.2	216	18.8	5.9%
Portugal	1,067	1%	10.1	106	30.9	3.5%
Ireland	693	1%	3.70	187	16.5	4.2%
		100%	**379**	**174**	**1,387.6**	**4.8%**
Total EU 2000	**65,958**					
1997	**58,702**					

Source: CSIL, National Furniture associations, NTC (2002)

- Increased demand for contemporary furniture by single households and the 45+ generation, with more variety in designs, material, functions and colours available.
- A growing home office furniture sector (SOHO), as more people work from home.

Germany

Figure 3.2 German furniture consumption 1998-2001 Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	3.863	4,185	4,310	4,182
Upholstered	2,907	2,954	3,404	3,491
Kitchen	3,153	3,193	3,072	2,949
Other	**6,962**	**7,107**	**7,013**	**6,698**
of which:				
- Bedroom	**1,756**	**1,871**	**1,908**	**1,857**

NOTE: figures are given at constant retail prices

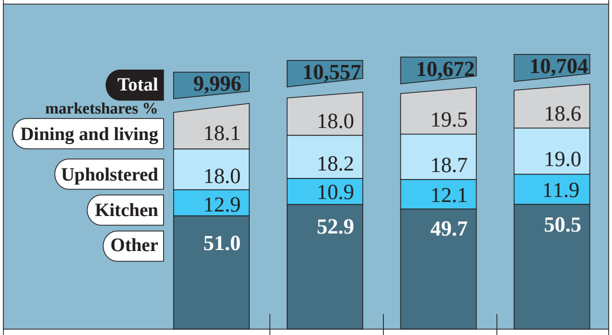
Source: CSIL, EUWID, HDH (2002)

The ***German*** market for furniture is the largest in the EU with a retail sales valued at US$ 17,799 (or € 19,401) million in 2000, representing a share of 27% of the total EU furniture market. Many Germans are willing to spend money to improve their well-being at home. The consumption per capita was US$ 216, which is 24% higher than the EU average. In the late 1990s, the furniture sales was driven by the trend to renovate or change home interiors, especially initiated by women. The market has also benefited from the new houses, which were built in former East Germany. Both trends resulted in an ongoing demand for dining and living, upholstered and bedroom furniture, in contemporary or the most favoured Landhaus (i.e. rustic) style. As is shown in figure 3.2, furniture sales grew after 1998, but declined by 3% in 2001, due to the recession, weakening consumer confidence, less newly built houses and intensified price competition. Indicators for the future German market include:

- Next to price, people regard good workmanship, attractive form, design and comfort important.
- The influence of lifestyle in furniture remains. People prefer to make choices in creating their own style interior, with ideas from the media.
- Demand for multi-functional, mobile and flexible items (e.g. easy to combine, store or extend).
- Modern furniture in the colourful “Junges Wohnen-style” will be more popular.
- SOHO and Senior furniture are growing niches.

Italy

Figure 3.3 Italian furniture consumption 1998-2001 Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	1,812	1,908	2,084	1,993
Upholstered	1,805	1,921	1,996	2,032
Kitchen	1,288	1,151	1,298	1,272
Other	**5,091**	**5,577**	**5,294**	**5,407**
of which:				
- Bedroom	**831**	**952**	**962**	**981**

NOTE: figures are given at constant retail prices

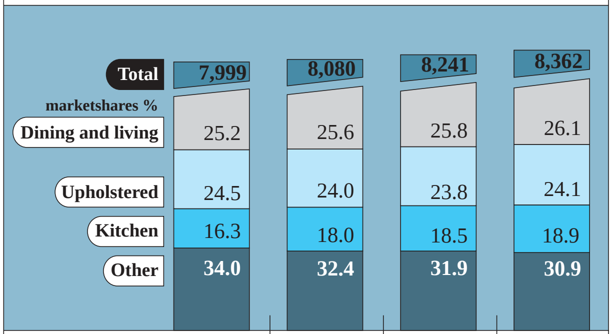
Source: CSIL, AssArredo (2002)

Italy is the leader in furniture design worldwide and has a major manufacturing and exporting industry. In 2000, retail sales were estimated at US$ 10,672 (or € 11,632) million, or 16% of the EU furniture market.
The consumption per capita in that year was US$ 185, slightly above the EU average. Dining and living furniture rosebetween 1998 and 2000 to 19.5% of Italian furniture market. In living rooms, a “muro attrezzato” (i.e. wall-unit composed of shelves for ornaments) and cabinets incorporating the TV and audio, are common. Within the ‘Other’ category in figure 3.2, bedroom furniture and wardrobes form a large part. Wardrobes are usually ceiling-high and have walk-in cabins with an upper rail to hold clothes.

Within the furniture market, there are clear differences in regional terms. Around half of Italian furniture sales comes from the wealthier northern regions with a stronger preference for contemporary and modern designs. In the poorer southern regions, people are more interested in classic or rustic style furniture. Young Italians, especially in the northern regions tended to marry or live together faster than before and were able to borrow money at low interest rates. Italians prefer tailor-made sets of furniture and regard product (material, design etc.), service and delivery (4 - 8 weeks) to be more important than price.

France

Figure 3.4 French furniture consumption 1998-2001
Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	2,021	2,073	2,128	2,183
Upholstered	1,961	1,942	1,966	2,013
Kitchen	1,308	1,461	1,527	1,582
Other	2,709	2,604	2,620	2,584
of which:				
Bedroom	823	849	862	877
Bathroom	231	242	259	262

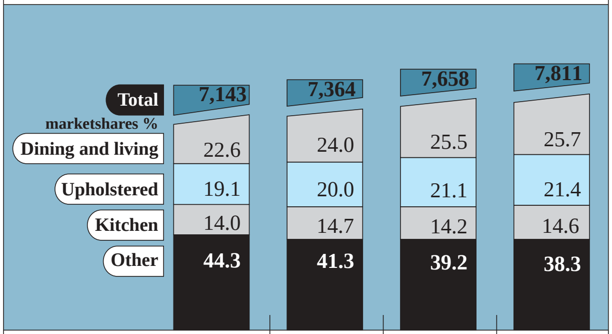
NOTE: figures are given at constant retail prices

Source: CSIL, IPEA (2002)

Although the purchase of new furniture in ***France*** is regarded as something of a luxury, there were still 7 million French households who buy new furniture every year according to a survey undertaken by IPEA (French Furniture Institute). In 2000, around 33 million furniture items were sold in French shops, representing a value of US$ 8,241 (or € 8,983) million and 13% of the EU market. Compared to Germany, French people spend little on furniture with a per capita consumption, of US$ 140. The improvement in the French economy after 1998 and a high interest saving system to buy property ("Plan d'Épargne Logement") stimulated French people to buy furniture. Chain stores such as IKEA and Fly doubled their market share (10% in 2000) in a few years. As is shown in figure 3.3, furniture consumption grew steadily, reaching an estimated value of US$ 8,362 (or € 9,114) million in 2001. Dining and living room and upholstered furniture accounted each for around one quarter of the market. Within the 'Other' category, sales of bedroom (market share 10%), bathroom (3%), storage units (cupboards, shelves) and home office furniture have shown a steady growth in the period of review. Overall, modern and (RTA) contemporary style items will continue to dominate the sector (64% of sales value in 2000). Rustic and classic style furniture remains popular for dining rooms and adults' bedrooms. Due to the recession in Europe, little growth is expected for the coming years.

United Kingdom

Figure 3.5 UK furniture consumption 1998-2001
Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	1,614	1,768	1,955	2,006
Upholstered	1,369	1,472	1,616	1,671
Kitchen	998	1,079	1,084	1,138
Other	3,162	3,045	3,003	2,996
of which:				
- Bedroom	801	883	956	982

NOTE: figures are given at constant retail prices

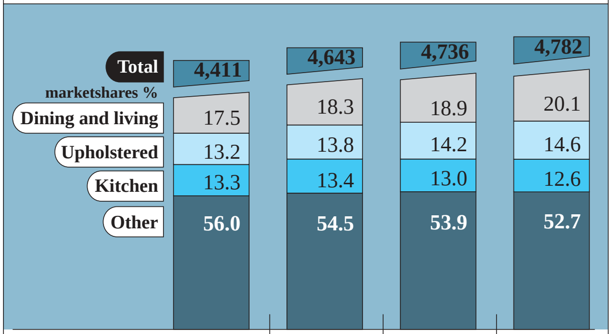
Source: CSIL, BFM (2002)

With a share of 12%, the ***UK*** furniture market is the fourth largest in the EU and continues to grow. As is shown in figure 3.4, retail sales in 2000 valued US$ 7,658 (or € 8,347) million. In the past few years, consumption improved as a result of sustained consumer confidence, regardless the US attacks in 2001. The furniture market is expected to grow further because of a rising number of single households and an increasing mobility. Motivated by "interest free" credit systems and by the fashion for home decorating (through media). There is a wide variety in price, quality, designs and styles in furniture with a growing preference towards mat finishing and light woods (e.g. beech, light oak, birch and maple). Although pine wood remains popular in the North of the country. Upholstered seating still forms one quarter of the UK market, and mainly include couches and sofabeds. Indicators for the future market are:

- The trend towards open-plan kitchens, dining areas and living rooms (new houses).
- RTA, SOHO and furniture for children and teenagers are growing segments.
- Demand for smaller, multi-functional and combination units (clever shelving systems).
- Interest in Contemporary ("Continental") furniture and the "Country House Look".
- More price-based promotions by chains with the possibility for consumers to barter.

Spain

Figure 3.6 Spain furniture consumption 1998-2001
Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	771	852	897	962
Upholstered	582	641	672	698
Kitchen	587	623	614	602
Other	**2,471**	**2,527**	**2,553**	**2,520**
of which:				
- Bedroom	**307**	**365**	**372**	**381**

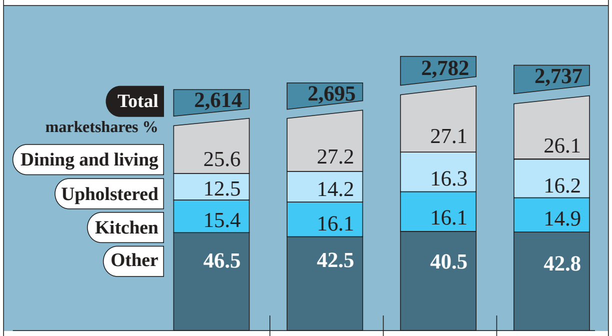
NOTE: figures are given at constant retail prices

Source: CSIL, ANIEME (2002)

Spanish people remain rational in their purchasing decisions and buy new furniture out of necessity and use items over a longer period. In 2000, the value of total consumption was US$ 4,736 (or € 5,162) million, or 7% of the EU furniture market, with a per capita expenditure of US$ 120. After 1995, the Spanish economy grew at a fast rate, especially in the more densely populated cities and urban regions, consumption of smaller sized households rose, contrary to people living in the desolate countryside. It is mainly in these regions where unemployment remained high (15% in 2000). The growing housing market in the major cities resulted in an increase in demand for furniture, especially dining and living room furniture accounting for nearly 20% of the market, as is shown in figure 3.5. In general, Spanish people prefer items of solid types wood in rustic, classic style and often buy direct from one of the many small local manufacturers. Young Spaniards prefer contemporary style, RTA furniture, often purchased at chains like Merkamueble, IKEA, Conforama rapidly expanding in Spain. Consumption slowed in 2001 because of a high inflation rate and a waning consumer confidence. Nevertheless, the trend towards smaller sized households will result in a sustained demand for furniture in Spain in the next few years.

The Netherlands

Figure 3.7 Dutch furniture consumption 1998-2001
Value in US$ million



	1998	1999	2000	2001 estimate
Dining and living	670	732	753	714
Upholstered	327	384	454	443
Kitchen	402	435	449	408
Other	**1,215**	**1,144**	**1,126**	**1,172**
of which:				
- Bedroom	**303**	**334**	**314**	**286**

NOTE: figures are given at constant retail prices

Source: CSIL, CBW (2002)

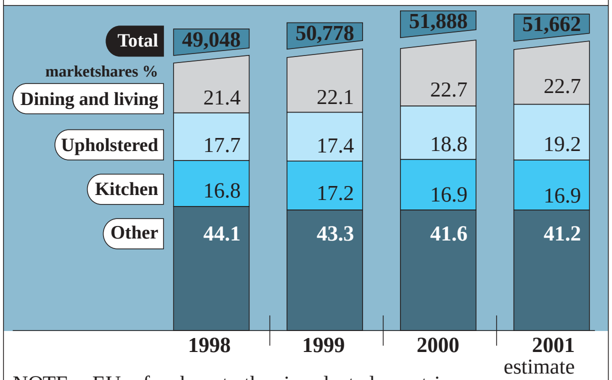
With a total retail sales of US$ 2,782 (or € 3,032) million in 2000, ***The Netherlands*** was the sixth largest furniture market in the EU. In the same year, the consumption per capita of US$ 174 was up to the EU average. Economic growth in the late 1990s, stimulated spending on furniture. After 1997, the housing market grew enormously, as did the Dutch population. According to CBW Woonmonitor, one third of furniture sales is purchased by people aged between 35 and 40. An increase in number of property transactions, special credit systems, overvaluation of existing houses and high interest by the Dutch in home improvement, stimulated furniture sales, which increased by 7% between 1998 and 2000 (see figure 3.6). Particularly dining and living sets, (coffee) tables, large upholstered couches, beds, cupboards, children's and kitchen furniture were more in demand. Strong media attention to home decorating on TV has also boosted interest in furniture. Home decoration has been increasingly fashion-sensitive and furniture product-life-cycles become shorter. Although, growth especially of kitchen and bedroom furniture, came to a standstill in 2001. Furniture sales fell in the first quarter of 2002 by 1.1%, because of a weakening consumer confidence and higher prices, partly due to the introduction of the Euro, which made the Dutch more careful in their spendings.

3.2 Market segmentation

Segmentation by product
Upholstered seating and **kitchen furniture** are large segments and along with the tendency in the late 1990s towards luxury, especially upholstered seating (two- and three pieces suits and sofas) grew steadily, as is shown in figure 3.8. Both segments are highly competitive with a wide variation in price, design, quality available, which makes it difficult for exporters to enter.
Upholstered seating is usually bought separately and the choice of fabrics is dictated by fashion in individual countries. Besides, new models increasingly have extra functions (e.g. remote control, massage) using the latest technology.

Kitchen furniture is often bought as RTA from retailers such as IKEA, MFI, Conforama or DIY chains, which roughly accounted between 35 - 40% of the kitchen furniture segment. The majority are fitted kitchens with increasingly kitchen bloc in the middle. As fitted contemporary style kitchens are common nowadays, there is a tendency in the United Kingdom and France towards removable free-standing items (e.g. cupboards, butcher blocs, dressers, work surfaces) in “farmhouse kitchens” (i.e. country style - *see photo no. 4*), which may offer opportunities for developing country exporters.

Figure 3.8 EU furniture consumption by product. 1998-2001 Value in US$ million



NOTE: - EU refers here to the six selected countries
- figures are given at constant retail prices

Source: CSIL, EUWID, National Furniture Associations (2002)

Product segments such as dining and living room furniture, which accounts for 23% of EU furniture consumption, offers good potential to exporters from developing countries. Distribution of this type of furniture is relatively simple and retail outlets generally sell the complete range. The same is true for non-upholstered seating, bedroom furniture, home office and other furniture.

Dining and living room furniture
In 2000, consumption by the six selected EU markets of dining and living room furniture was estimated at around US$ 11,788 (or € 12,849) million, almost one quarter of the EU total. This figure increased in most of the selected EU markets, particularly in Germany, United Kingdom and Spain in the past few years. There is now more innovation in furniture types and functions.

Products are lighter, well-designed, moveable (on wheels) and more receptive to new technologies. Most of these items are aimed at creating a new, richer dining and/or living room that is more adaptable to different uses. Less formal eating habits and the rise in the number of single households have contributed to this development.

Major products in this segment include (dining) tables, chairs, sideboards, coffee tables, buffets, end tables, dressers and (movable) TV/Video tables. Stools (from massive wood or on wheels) and beanbags have made their comeback in living rooms. There is a greater variety in forms and different furniture items or styles or materials are more frequently combined *(see photos no. 1, 3, 7, 8 and 9)*. Around 30% of living room furniture items sold, is bought as RTA and is expected to rise, considering the ongoing expansion of the large furniture retailers, especially in Spain and Italy.

Dining tables and chairs are lighter in weight and appearance than in the past. The styling of *dining tables* is erect and straightforward. Gate-leg, folding and drop-leaf tables are popular for small dining areas, as they use space efficiently. In table tops at the cheaper market levels chipboard, melamine and laminates are often used. Asymmetric shapes and combinations of materials are all popular. For example, different wood sorts can be used in one table, or combinations are made of wood and aluminium, of chromium frames and glass, of wrought iron and marble, or of stone and wood.

Chairs vary considerably in style, from simple modern shapes to rustic, classic, baroque or colonial styles, reflecting the huge influence of exotic design in decor. Fine rattan and wickerwork are still popular and are often combined with metal or aluminium. Chromium frames and legs are frequent in contemporary style chairs, with a plastic or wooden seating, which are easy to stack. There is an interest in multi-functional chairs and in more variety in colours, currently ranging from natural or metallic colours to bright 1980s or softer 1950s colours (e.g. yellow, pink, red, blue, turquoise, orange).

Colonial style furniture, which combines south Asian and western design features, is becoming more recognised as a permanent style and are often made of darker types of wood (e.g. teak, wengé, mahogany, cherry) or rattan and bamboo. Next to the usual teak wooden dining sets, more luxury items are being introduced in the selected EU markets *(see large couch at photo no.2)*. These include seating made of highly polished cherry wood and upholstered with leather, abundantly decorated small tables, or desks, with their atmosphere of travel to exotic countries. Colonial style furniture is still a growing niche market in most selected EU countries.

Bedroom furniture

Along with increased concerns about their health, consumers are now more aware of their sleeping habits and this has resulted in the replacement of mattresses and beds. Nowadays, people are more inclined to buy beds or bed bases made from wooden laths, without a bedstead. This is partly because, as the population gets taller, there is a greater demand for bedding 180 x 200 or 210 cm in size and manufacturers of bedsteads have not always met this change in demand. Furthermore, it is also cheaper to exclude the bedstead from the overall purchase. The trend now is towards lighter bedsteads on relatively tall (decorative) legs, and heights which make them more convenient for older people.

Sleeping areas in European bedrooms have been reduced because of the popularity of large fitted cupboards. Bedrooms are now often multi-purpose and this has resulted in an increase in demand for incidental furniture like occasional tables, drawer sets, modular desks/shelving (for computers, TV, video), room dividers and chairs. In the United Kingdom there is currently a move away from wardrobes and people tend to store their clothing in open racks, on rails or in wicker baskets.

In 2000, bedroom furniture represented 10% of total EU consumption on furniture, with a value of around US$ 5,374 (or € 5,857) million. An important trend in this sector is the increasing demand for adjustable beds. Consumers buy around one quarter of bedroom furniture in RTA form (in volume terms). Wood and MDF are the mostly used raw materials in the manufacture of beds. Modern and elegantly designed metal beds and classic/baroque style metal or wrought iron beds are becoming more popular. Beds made of pine and light oak continue to hold an important share *(see photo no.6)*, while birch, beech, ash and warmer wood colours like cherry are gaining interest.

Children's furniture

Bedroom furniture for children and teenagers have experienced a steady growth with gradually more specialist furniture makers entering this segment. The introduction of multi-functional and modular ranges, *(see photo no.5)*, which can be added to over time as the child grows, has meant that parents are now more willing to purchase better quality items. Recently parents tend to buy more for their children, who now play a larger role in furnishing their own rooms.

Another tendency is that young people are spending more time in their rooms (computer, TV, video games etc.). In this segment, safety standards are important and exporters must pay extra attention to rounded corners, non-cascading drawers, steel bolts in bunk beds and bolted bed rails.

Home office furniture

The *home office furniture market*, sometimes referred to as ***SOHO*** (Small Office Home Office) has grown fast. In most EU markets home working is becoming more common. There is a rapid expansion of flexible, remote and telework practices coupled with PC penetration in the home for business and family use. Additional demand for home office furniture comes from a new generation of computer-literate schoolchildren, who need some sort of workstation at home to complement the facilities available at school. In addition, the leisure use of PCs, for surfing the Internet, e-mailing and chatting, video games and interactive TV games, is still on the increase.

Demand for space-saving furniture to accommodate the equipment (PC, printer, scanner, disks etc.) is likely to replace the old spare table at home. Specific products include desks, filing cabinets, integrated workstations, printer trolleys, shelving and drawer units (for storage of files and papers), office style chairs and room dividers *(see photo no.10)*. All these items are preferred to be on wheels, so that they can be moved easily. Most home office furniture is made of laminated particleboard, is low-priced and is often purchased as RTA. Designs can vary from the “industrial” to a more “personalised” look. This growing segment is highly competitive and quality standards, ergonomic requirements and fast delivery are important in most EU markets.

Other furniture

Sales of ***Cupboards, bookshelves, room-dividers and storage/wall units*** have grown strongly in the last few years. As personal computers and other electronic equipment become the focal point of the home for information, communication and entertainment, consumers are seeking and buying practical, multi-functional, good-looking furniture to house this equipment in such a way that it does not dominate the ambience of the room.

As with other furniture, there is a general trend to filler shapes (for corners etc.), open shelves and lighter (transparent) materials, to prevent these large items of furniture from dominating rooms and to accentuate space and openness *(see photos no. 7, 8, 9 and 11)*. Modern items are preferred with wheels, so they can be moved easily. Lighter woods, like beech, maple and birch, and warm colours such as cherry are popular. There is much use of glass (preferably opaque or frosted, rather than clear and cold) in door fronts and sliding panels. Combinations of metal, wood and glass are popular in most items.

Rattan furniture

In the early 1990s, the use rattan furniture started to become more popular in Germany and was often combined with wooden (pine) furniture in the country or Landhaus style. Also in United Kingdom and The Netherlands cane and rattan furniture has been popular in living rooms, bedrooms and children's rooms. In France rattan items are used more for the garden or in second homes, while in Italy they are largely used in city apartments (on the balcony) or second homes.

Italian styling and design in rattan and the use of fine wickerwork cane of a high quality, particularly in chairs, has created more variety in rattan furniture, which still nowadays appeals to the medium and higher end of the market. Rattan furniture now has its own established position in home interiors. Rattan chairs are frequently combined with wooden tables in contemporary style furniture. In recent years, coloured rattan cane furniture has become very fashionable and a niche market has developed for furniture made of rattan mixed with metal which gives a more luxurious, solid look.

In competition with rattan is “loom” furniture, which is often used in dining and living rooms and which goes well with contemporary and colonial style furniture. Loom furniture (mostly chairs) is made from an iron wire frame, which is woven or covered with fibre. It looks similar to fine cane wickerwork, but is stronger and can be painted in different colours. Although Indonesia dominates the market for rattan furniture, there are still some opportunities for other developing countries. Especially since the (modern) rustic style has made its come-back in the EU. Though, furniture must be of good quality and the designs should be up with the latest trends. Also, wicker or bamboo baskets or cane mats remain popular accessories for bedrooms or bathrooms.

Photographs

The photographs on the following pages show the different kinds of interiors typical to each furniture style, as described in Chapter 1 and in this section. They are ranged from classic to modern.

1. **Classic style**
(Dining and living room)

2. **Colonial style**
(Living room with couch for ‘lounging’)

3. **Classic - country**
(Dining and living room)

4. **Country style**
(Kitchen with free-standing items)

5. **Contemporary style**
(Children's bed - multifunctional)

6. **Contemporary style**
(Bedroom with wooden cabinets)

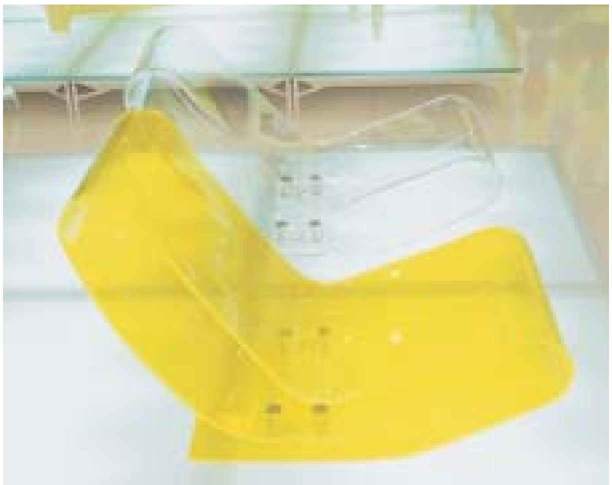
7. **Contemporary style**
(Combinations of wood, glass and metal)

8. **Contemporary style**
(Open shelves and cupboards)

9. **Contemporary style**
(Low table and moveable cupboards)

10. **Contemporary style**
(Home office with room divider)

11. **Modern style**
(Simplicity and minimalism)



12. **Modern style**
(transparent seats in bright colours)

RTA (Ready-to-assemble)
In 2000, the average share of RTA furniture occupied around 15% of the EU furniture market in value; in volume, the share is much higher. Contemporary furniture is the style most often purchased as RTA. Many cupboards and wall units are purchased as RTA, as are dining tables and chairs, beds and small or occasional furniture, which is easily transported and simply assembled. Light colours and light woods are just as dominant here, as aluminium and matt glass. The growth of this segment in the early 1990s was led by IKEA, followed by other furniture groups and mail order companies.

Key factors which have a positive influence on RTA sales:
- RTA has no cheap image anymore as the quality of items improved.
- More furniture has been available in RTA form.
- Consumers are not prepared to wait and want instant delivery.
- As many items are supplied in unfinished wood, there is a degree of individuality for the buyer, who can paint, lacquer or wax the items according to their personal taste.

Points of concern for exporters from developing countries:
- An efficient production system is essential and packaging must be solid.
- The fittings must be correct, according to EU quality standards.
- Fitting technology should be as simple as possible.
- Assembly instructions must be explained clearly (e.g. use of diagrams).
- Quick delivery and good after-sales service are extremely important.

Segmentation by user and lifestage
In general, potential users of furniture made in developing countries are mainly in the low to medium income range, who buy a wide range of contemporary, country or colonial style furniture. In recent years, changes in lifestyle and trends have been at a faster rate. Consumer behaviour has become more impulsive, especially in northern EU countries. Therefore, it may be easy to classify furniture users into different segments, but it will be harder to predict how each group will behave and what they buy. Nevertheless, in terms of lifestage, consumers can be divided into the following groups:

Group		**Main characteristics**
Singles (Young) **(16-29 years)**	→	People living alone usually spend more time out of their homes and have contemporary furniture which is practical, functional and in the lower price bracket. Many people have a computer or a small office corner in their living room.
Singles (Older) **(20-45 years)**	→	People whose circumstances necessitate the setting up of a new home e.g. single mothers setting up house or divorcees starting again. Independent career men or women are also included in this group. Initially they tend to buy furniture which is practical, multifunctional, easy to transport and up to the latest interior trends.
Young parents / Couples **(25-40 years)**	→	A group which is increasingly sensitive to fashion. Their new interior ideas and furniture purchases are likely to be individual combinations of past styles with the latest decorative and colour trends. They are aware of new materials and brands.
Middle parents ***(mainstream)*** **(35-55 years)**	→	The largest group of consumers, who spend more time at home and to whom their furniture is important. They tend to have contemporary furniture and buy new items either for a change, because they are needed for a growing household, or because they are moving to a larger house. Many of this group will want to follow interior fashion trends, usually to add interest to their home, or to show to visitors.
Middle-late parents ***(conservative)*** **(40-60 years)**	→	They started adult/married life with a particular interior style (typically heavy hardwood furniture) and have changed little, except for functional requirements. Their furniture is solid and stylish and they often choose for classic style furniture.
Seniors **(65+ years)**	→	A fast growing group in almost all EU countries. After their children have moved out, they like to re-furnish their home interior, suiting their own taste, which can be based on existing furniture, contemporary style, or a mix of the two. Important “senior furniture” items include higher seats, tables which comply with the latest ergonomic requirements.

3.3 Consumption patterns and trends

Influences on consumption

Smaller households

In the coming years, the number of single households is expected to increase in all selected EU countries because of more divorces, career men and women and older people. This may result in an overall reduction in size of houses, apartments and rooms in the near future and an increased demand for smaller sized multifunctional furniture items. In the United Kingdom, Germany, France and The Netherlands, single and two-person households together account roughly for two-third of all households and are stronger represented than in Italy and Spain.

In northern EU countries, birth rates are expected to slow as women tend to have children later (average: 29 years), which implies that the age profile is rising here. In southern EU countries family ties are strong and families live together for a longer time, which means more 4 and 5 person households.

Ageing structure

Currently people aged between 16 and 44 years old are strongly represented in the selected EU countries and are the major consumer groups of furniture. The EU has an ageing population structure and in most countries the proportion of 45+ olds increases rapidly (see table 3.1). By the year 2021, the EU population is expected to decline with a further growth in the 45+ old age group, particularly in Germany, Italy and Spain. The elderly people form an interesting market segment for furniture. After their children have moved out, they like to re-furnish their home interior, suiting their own taste. They have more time and money to spend then other age groups.

Housing situation

All selected EU countries had in the late 1990s, a number of dwellings that can only house 2-3 people under the same roof. But by 2000, the buoyancy of construction seemed to go hand in hand with the economic growth and the catching up of southern EU countries. However, the period of uncertainty after the US attacks in 2001 abruptly made an end to the booming housing market in most countries.

According to a recent survey by INSEE (French National Statistics Office), the number of home owners is large in Italy and Spain, while in northern EU countries housing is historically more rented. Though recently, ownership has overtaken renting, except in Germany (49%) as is shown in table 3.2.

Table 3.1 Population and age structure in the selected EU countries
Population in million / by age groups / by ratio 45+ / population forecast 2021

Population	2001	0-15 year	16-44 year	45-64 year	65+ year	ratio 45+	2021 (forecast)	Tendency
Germany	**82.3**	16%	42%	26%	16%	**42%**	78.5	decline
Italy	**57.6**	15%	42%	25%	18%	**43%**	55.2	decline
France	**58.7**	20%	43%	21%	16%	**37%**	63.4	growth
United Kingdom	**59.7**	20%	40%	23%	17%	**40%**	63.6	growth
Spain	**39.4**	15%	41%	25%	19%	**44%**	39.3	decline
The Netherlands	**16.0**	18%	40%	27%	15%	**42%**	17.1	growth

Table 3.2 Households and housing situation in the selected EU markets, 2000

	Households (million)	Size households (percent)				Dwellings (million)	Rooms/ dwelling	Floor area/. dwelling	Home Owners
		1 p.	2 p.	3-4 p.	> 5 p.				
Germany **	**37.8**	36%	33%	26%	5%	37.7	4.3*	89 m^2	49%
United Kingdom	**24.3**	29%	36%	29%	6%	23.8	4.9*	78 m^2	72%
France	**23.9**	30%	32%	30%	8%	23.3	3.7*	91 m^2	55%
Italy	**20.3**	23%	25%	45%	7%	19.9	4.1	93 m^2	77%
Spain	**12.4**	10%	23%	51%	16%	12.2	5.0	89 m^2	81%
The Netherlands	**6.7**	33%	35%	26%	6%	6.4	4.0*	86 m^2	52%

Remarks: * excluding bathroom and kitchen
** excluding former East Germany

Source: INSEE, CBS Jaarboek Wonen (2001)

Houses built in rows are most common in the United Kingdom and The Netherlands, whereas Germans, Italians and Spaniards more likely to live in apartments.

Socio-economic factors

Disposable income is a major influence on consumer expenditure on furniture. Due to the economic recession from 2001 onwards, job security cannot be taken for granted and the welfare state is less capable to offer support. Life expectancy is longer and many people realise the need to save for their future and tend to postpone purchases of durable consumer goods. In addition, furniture has to compete with other expenses on e.g. holidays, hobbies, entertainment, electronics, cars, etc., especially in the southern EU countries, where people spend less time in their homes.

On the other hand, future trends in favour of furniture are, that people in the northern EU countries spend an increasing amount of free time in the home. They are more likely to work at home and want to create comfortable and up-to-date interiors which reflect their individual style and requirements.

Furniture is more fashion-led

People generally take more pride in the way they furnish their homes and create their own individual choice and style of furniture, which can change according to trends in fashion. They are more aware of the influence of surroundings on their well-being and thus pay more attention to it. Nowadays the furniture market is much more fashion-led than before. They are heavily influenced in their choice of furniture by magazines and television programmes, featuring creative ideas for interiors, home improvement suggestions, interior architects “metamorphoses” and designers’ talk-shows etc. In addition to the annual national home interiors fairs held for consumers, there are numerous regional home and garden fairs which serve as a source of inspiration to many people.

If consumers have become tired of a design, they may choose for a cheaper furniture item, rather than one of a high quality and durability. They may, for example choose seats and chairs with loose covers, so that the fabric can be changed in future.

Consumption patterns

Buying motives

According to the UEA (European Furniture Manufacturers Federation), around 70% of all furniture sales are now attributed to replacement because of changes in taste or available income. However, this ratio can vary from 45% to 80% depending on the product. Around 30% is bought after births, the formation of new households, moving house or after damage or breakage of existing furniture.

More individual items

The EU market is more or less evenly divided between consumers purchasing of sets of furniture and individual items. The purchase of individual items is expected to grow, as consumers look for new items which co-ordinate with their existing furniture.

Quality

In most countries consumers are critical and expect value for money. Sound quality and suitability of the furniture for its designated use are the key requirements. In some countries, retailers who sell furniture of good quality have a recognised label and are members of a National organisation for home furnishings. Stores also use these labels as promotional tools to attract customers. Fabrics may also carry a quality label, which clearly informs consumers what kind of material was used in the manufacture of the fabric. Each EU country has its own national labels.

Price sensitivity and brands

Despite increased emphasis on quality, price remains a very important influence, especially with Dutch, French, German and British consumers. Competition between retailers on the basis of price has been a significant feature in most EU markets for several years and consumers are used to, and expect to receive discounts on their purchases of large furniture.

Especially after 2001, the cautiousness in spending and the distrust towards new pricing after the introduction of the Euro, resulted in more critical and demanding consumers, who do not accept old trade-offs.
They know much (through the internet) about the latest models, brands, (foreign) prices and expect good service. As prices for mainstream furniture items are under more pressure, exporters are advised to concentrate on original furniture, which meets the function, design, size and comfort needs of a specific target group.

Environment

Environmental friendliness has become an important factor in purchasing decisions in Germany and most northern EU markets, and consumers are increasingly taking it into account. National governments, trade and industry are at the forefront of European action to preserve the environment. Consumers are well informed and continually exposed to media publicity on the subject. There is a growing interest in guarantees that furniture is made from sustainable woods and natural and environmentally friendly materials and finishes.

Trends in furniture

From the second half of the 1990s onwards, consumers in all categories showed a growing interest in contemporary style furniture, which then became a fast growing segment of the market at the expense of classic style furniture. Nowadays consumers mix many different styles and take ideas from all over to produce interiors where they can relax from their otherwise hectic lives to, enjoy time with family and friends. They prefer to create their own *interior concept* which is different from that of others, and which expresses who they are to other people. Significant trends in furniture include:

Combinations and fusions

- The boundaries between styles have become much more vague and this has resulted in combinations or “fusions”. For example, a modern aluminium wall unit may co-exist with a classic dark wooden table, rattan chairs and a retro designed coffeetable from the 1970s, all in the same living room.
- Materials like wood, metal, aluminium, glass and stone are being combined. Colours are mingled, so that dark, bright, transparent or natural colours can be used in the same interior.
- Special interior decorative effects are achieved through the placing of small furniture, accent colours and accessories, in which there is a growing interest.

Multifunctionality, flexibility and comfort

- Individual items of furniture can be used for different functions: flexible seating for sitting, reclining or sleeping; modular wall systems and adjustable beds allow flexible sleeping arrangements.
- Specialised furniture, made for older people with a focus on comfort/ergonomy (e.g. higher seats).

Simplicity and enriched minimalism

- In contemporary style furniture, designs are simple, fine, straightforward and cubic, but at the same time have soft, rounded lines.
- Small visible legs, made of metal or wood, are an important feature at the moment for living room chairs, couches, armchairs and cupboards.
- Minimalism is enriched in terms of quality and colours (e.g. gold or platinum instead of silver).

Modern rustic style and international interiors

- Rustic style has made a comeback in a modern form, with a natural, familiar, romantic and adventurous atmosphere, created by robust furniture combined with exotic accessories.
  For example, a dining set consisting of a square table of solid wood (light oak) and chairs with “high-tech” chrome frame, combined with seating of canvas, hemp, cork or abacca leave.
- Other matching occasional furniture include tables, stools of solid wood with ethnic, folk and colonial/oriental designs, including curves, latticework, wrought iron from countries like Morocco, Philippines, Mexico, India, Thailand and other developing countries.
- This style is a reaction to the ongoing changes in designs in the past few years. Popularity has also been stimulated by an increasing number of people travelling to exotic locations.

Trends in raw material

According to the UEA, furniture made of wood, including cane, rattan and similar materials, accounted in 2000 for around 65% of total volume of furniture sold in the EU. About 25% is made of metal and the remaining 10% is made of plastic and other synthetic materials. This latter segment is expected to increase in relative importance.

In addition, wooden furniture is more frequently combined with metal or chrome. In the late 1990s, metal, glass and plastic have been more popular in modern and contemporary styled interiors. Composite board or particle boards and MDF (Medium Density Fibreboard) are increasingly being used in the manufacture of furniture, which is then veneered with more costly hardwoods (e.g. birch, beech, cherry, alder, maple or oak). This has resulted in the production and sale of low-cost wall systems, beds, tables and desks.

Materials and colours

- *Woods:* Interior parts and primary and secondary frames of most items are made from lower quality wood like birch, ply and laminates, while for exposed surfaces fine timbers are used. Lighter hard woods like oak, beech, maple, alder, birch, cherry and hickory have proved more popular than pine. The importance of warm tints has resulted in more demand for darker wood species like cherry, oak, walnut, wengé, mahogany, teak or rubberwood in faded/darker colours. “Antique” or “old paint” and “aged” looks remain important and recycled wood is gaining in popularity.

  Exotic looking wood such as *Lenga* from Chile, Jatoba and *Macaranduba* from Brazil, *Zebrano* from Central Africa and *Rubberwood* from Malaysia are becoming popular.

- *Rattan, fine wickerwork, bamboo, hemp and eelgrass* continue to be important materials, which are increasingly used in contemporary designs. Rattan furniture fits closely with a growing consumer interest in natural interiors, combined with aspects of indoor/outdoor/patio life and exotic, oriental elements. The construction of verandas and in-house gardens has gained in popularity.

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to be continued

Materials and colours *continue*

- *Metals:* the metallic, hi-tech or industrial look is becoming increasingly popular in the furniture world. Steel is not considered as a stabiliser for table and chair legs anymore, but also serves as an eye-catching design element. In modern designs, metal in simple forms and thin structures is frequently used in conjunction with wood or glass. Stainless steel, chrome, wrought iron, aluminium and copper have become more popular in the past few years.

- *Glass:* frosted glass and other opaque finishes, rather than clear (cold) glass is popular. Natural and acrylic glass is increasingly used in combination with other materials in tables, cabinets etc.

- *Mixed materials:* new natural materials are used in combination with wood, rattan and metal.

- *Fabrics*: these are softer in texture and appearance, with single light natural colours used as a basis. Small motifs, a textured look, geometric or large colourful designs are possible. Floral designs, micro-fibres are still common and (soft) hi-tech fibres are gaining importance.

- *Colours:* basic colours for large pieces of furniture can be light, natural or dark; accent colours are stronger and vary from strong natural tints such as vanilla, gold/light brown, cinnamon and cacao to a great variety of decorative exotic colours. Bright colours like yellow, yellow-gold, purple, hard red, turquoise, night blue, electric blue, orange and green are common in contemporary, modern interiors and in furniture for children, and became more popular in upholstered and other furniture.

- *Finishes:* there is a comeback of polished lacquers combined with solid colours and chrome plated metal, with some products recalling the style of the 1970s and 1980s. There is much use of satin-finish, acid-etched, painted glass with neutral or bright colors; opaque lacquers; painted and enameled steel; anodised, polished and mat aluminum. In the more expensive items laminates are used.

4 PRODUCTION

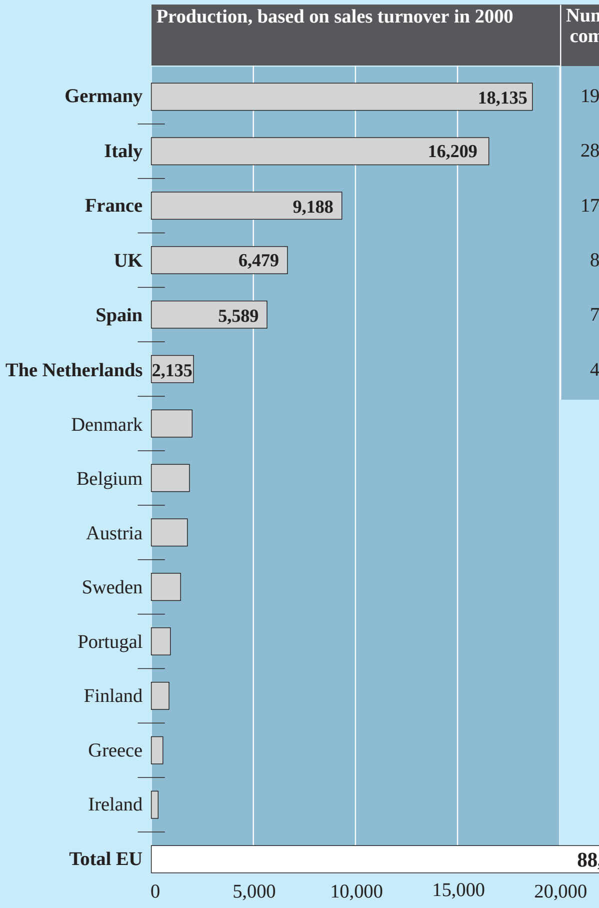
Furniture manufacturing is a basic industry in most EU countries and represents around 3% of the total EU industrial production, 2% of GDP and 2.2% of the total workforce in the EU. In 2000, the sales turnover of the 88,500 EU furniture manufacturers valued US$ 67,578 (or € 73,662) million. The EU furniture sector accounted for around 45% of total world furniture production, compared to 25% by Asia (China, Japan and South East Asia) and 20% by North America (USA, Canada).

The furniture industry has a long tradition in the EU and is rather mature. Demand is very fragmented, taking all the differences in styles, craftsmanship, tastes and materials used in furniture into account.
This implies that production is not usually in large lots and single manufacturers rarely produce a full range of products. Especially Italy, Spain and the United Kingdom have many small scale manufacturers, which are family-owned businesses.

In the early 1990s, the furniture industry suffered from the recession. But after 1997, the industry was stimulated by the economic recovery coupled with the construction of new houses, which was followed by increased domestic and foreign demand in almost all EU countries. Especially, 1998 and 1999 were positive years for the EU furniture industry, although growth slowed in 2000 and only rose by 1.1%, with falling sales turnovers in the German, Danish, Dutch and Belgian industries (see figure 4.1). On the other hand, between 1999 and 2000, Portugal, Austria and Greece increased production considerably. Nevertheless, after 2001, furniture production stagnated in most EU countries because of falling demand and increased imports, especially from Asian countries.

Within the EU, Germany is the largest furniture producing country, accounting with a sales turnover of US$ 18,135 (or € 19,768) million for 27% of total EU production value. Germany is followed by Italy (24% of EU production turnover), France (14%), United Kingdom (10%), Spain (8%), The Netherlands (3%), Denmark (3%), Belgium (3%) and Austria (2%), as is shown below.

Figure 4.1 Production of furniture in EU countries, 1999 - 2000



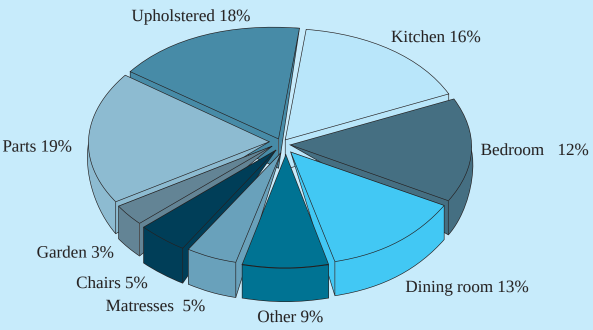
	Number of companies	Sales turnover furniture Industry			
		2000 € million	2000 US $ million	1999 US $ million	Difference 1999/2000
Germany	19,100	19,768	**18,135**	**18,551**	**- 1.7%**
Italy	28,000	17,668	**16,209**	**15,723**	**+ 3%**
France	17,020	10,015	**9,188**	**8,958**	**+ 2.5%**
UK	8,025	7,062	**6,479**	**6,348**	**+ 2%**
Spain	7,560	6,092	**5,589**	**5,477**	**+ 2.4%**
The Netherlands	4,100	2,327	**2,135**	**2,177**	**- 2%**
Denmark	na	2,302	2,112	2,178	- 3%
Belgium	na	2,047	1,878	1,902	- 1.3%
Austria	na	1,858	1,704	1,619	+ 5%
Sweden	na	1,554	1,426	1,397	+ 9%
Portugal	na	1,004	921	911	+ 1%
Finland	na	978	897	762	+ 14%
Greece	na	619	568	516	+ 3%
Ireland	na	368	337	307	+ 9%
Total EU	**88,500**	**73,662**	**67,578**	**66,826**	**+ 1.1%**

Source: CSIL, UEA, VDM (2002)

Production by product group

The total EU production value in 2000 of US$ 67,578 million included all types of furniture made with any material by all the companies of the sector. It is estimated that wooden furniture represented 75% of this total, with an EU production value of US$ 50,683 (or € 55,245) million. The furniture industry consists of various sectors, in which manufacturers specialise in the production of a specific type of furniture. In 2000, the largest sub-sectors in terms of total production value were: upholstered furniture (18%), followed by kitchen furniture (16%), dining room furniture (13%), bedroom furniture (13%) and parts (19%). According to a trade source, the value of total EU production of rattan furniture was estimated at around US$ 468 (or € 510) million in 2000. Italy is by far the largest manufacturer of rattan and cane furniture.

Figure 4.2 EU furniture production by product group, 2000. As percent of total value (=US$ 67,578 million)



Source: CSIL, UEA (2002)

Italy, United Kingdom, Denmark and Belgium are large manufacturing countries of upholstered furniture, while Germany produces much kitchen furniture, as is shown below.

Furniture suppliers

The furniture industry is located in one or more concentrated areas in each country. In *Germany* there are three areas (North Rhine-Westphalia, Bavaria and Baden-Württemburg), in *Italy* about two thirds of furniture suppliers are in the northern part (Lombardia, Pesaro). In *France*, most suppliers are located in the northern regions (Ouest/Vendée/Bretagne, Ile-de-France and Normandie) and the southern Rhône-Alpes region. The *Spanish* furniture suppliers are mostly concentrated in the Valencia, in Catalunia, Basque and Murcia regions.

According to the UEA, the 88,500 EU furniture manufacturers in 2000 can be divided as follows:

- 8,500 large companies, employing over 20 people, with totally 600,000 employees.
- 80,000 small companies, employing less than 20 people, with totally 300,000 employees.

The level of concentration in the furniture industry is increasing, though it is still low compared to other continents. The top 10 EU manufacturers control 10%, whereas the top 10 US manufacturers control 30% of their total furniture supply.

Production in main EU countries by product group, 2000

	Sales US$ million	Major product group
Germany	18,135	Upholstered (18%), Kitchen (24%), Other (58%).
Italy	16,209	Upholstered (20%), Kitchen (13%), Other (67%).
France	9,188	Upholstered (14%), Kitchen (14%), Other (72%).
United Kingdom	6,479	Upholstered (23%), Kitchen (17%), Other (60%).
Spain	5,589	Upholstered (15%), Kitchen (11%), Other (74%).
The Netherlands	2,135	Upholstered (19%), Kitchen (17%), Other (64%).
Denmark	1,878	Upholstered (21%), Kitchen (12%), Other (67%).
Belgium	1,704	Upholstered (22%), Kitchen (13%), Other (65%).
Austria	1,426	Upholstered (7%), Kitchen (14%), Other (79%).

In the EU, there are 50 (groups of) companies with a turnover of more than US$ 100 million. The majority of these companies specialise in the production of one or two types of furniture, except the few large multi-product enterprises such as the German Schieder, Welle and the French Parisot. The 10 largest manufacturers are shown below.

In order to face the growing competition from cheap imported furniture from developing countries (especially China, Indonesia, Malaysia) and deal with the growing power of international furniture retailers, the industry is currently changing. Furniture manufacturers are forced to choose between:

- ***Enlargement of scale and outsourced production***

Mergers and acquisitions between manufacturers have led to larger, international operations. In 2001, a few large furniture companies, among which Steinhof (Germany), Natuzzi (Italy), Rougier (France) and Samas (The Netherlands) and Biesse-Schelling (Austria) were quoted on the stock exchange, being a tool for further growth.

In the past few years, large furniture manufacturers invested in further automation and computerisation to standardise their production, in order to save costs. Factories are being moved to Eastern Europe and North African countries (e.g. Egypt), where labour costs are low. Nowadays, around 25% of the Polish furniture industry is financed by large German manufacturers, such as Schieder Gruppe, Steinhoff, Alno and Klose.

In the coming years, more co-operation between the *CEECs (Central and East European Countries)* is expected. Eastern European countries are nearby, so transportation costs are low and their manufacturers are able to respond quickly to faster changing market needs. In addition, co-operation will be stimulated by the introduction of the Euro, reducing risks of currency conversion, as is now the case with the dollar, which is used by non-EU countries.

- ***Further specialisation through co-operation***

On the other hand, in Italy, strong co-operation exists between manufacturers in the areas of design, marketing, production, etc., with small manufacturers increasingly acting as sub-contractors for larger firms. They produce components, semi-finished products or finish or assemble furniture, which gives the industry added flexibility.

Another strategy of smaller manufacturers is to specialise by adding new products or accessories which complement their own products and in so doing open up to the possibility of using new suppliers or partners, who could well be exporters in developing countries.

- ***More flexibility and faster delivery***

The biggest threat to the trade is the continuing downward competitive pressure on prices. This will necessitate the production of smaller lots, products with shorter life cycles and more product innovations. Manufacturers will also need to be flexible enough to produce furniture according to specification. Another development is the increased requirement from EU importers and the industry to supply furniture items "Just In Time" (JIT). The JIT system requires extremely quick delivery, which means that exporters who are not close to their customers must keep more items in stock.

- ***More furniture in semi-finished form***

In general, furniture is increasingly exported in semi-finished form and without accessories. Finishing is undertaken in the consuming country, which ensures that it is finished to the required specification and quality level.

Table 4.1 Top 10 largest furniture manufacturers in the EU, 2000

Manufacturer	Turnover in US$ million	Country	Types of furniture
Schieder Gruppe	1,083	Germany	Bedroom, dining, upholstered
Steinhoff	1,011	Germany	Upholstered, dining, other furniture
Welle	835	Germany	Bedroom, dining, upholstered, kitchen
Samas Group	798	The Netherlands	Office
Natuzzi	713	Italy	Upholstered
Alno	511	Germany	Kitchen
Hülsta	508	Germany	Upholstered, dining, bedroom
Airsprung furniture PLC	432	United Kingdom	Upholstered, mattresses
Wellmann	422	Germany	Kitchen
Skandinavisk Group	388	Denmark	Office, bedroom, dining

Source: UEA,CSIL, Key Note (2002)

5 IMPORTS

Trade statistics given in this Chapter are from Eurostat, which is based on information from the Customs and EU companies given on a voluntarily basis. Especially in the case of intra-EU trade not all transactions are registered, such as those by smaller companies and transactions from non-EU sources (see remarks on trade statistics in Chapter 2). On the other hand, figures for trade between the EU and the rest of the world (Extra-EU) are accurately registered and, therefore, more precisely represented in these statistics. Nevertheless, these statistics must be treated with extreme caution and are only intended to give an indication of trends in international furniture trade.

The statistics specify total imports, divided into volumes/values sourced from other EU countries (Intra-EU), non-EU countries (extra-EU) with the values/volumes coming from developing countries. The developing countries are defined by the OECD (Organisation for Economic Co-operation and Development) and are listed in Appendix 9. Appendix 2 lists import statistics of the EU and the selected markets within the EU and gives breakdowns of the EU imports by product group. In these trade statistics the values for dates after 1 January 1999 are also expressed in €.

5.1 Total imports

Total imports by the EU
The EU is the leading importer of furniture in the world and, in 2000, accounted for around 50% of total world imports, or 7,232 thousand tonnes with a value of US$ 19,434 (or € 21,124) million. Between 1998 and 2000, all countries in the EU, especially the United Kingdom, France and Italy, increased their imports of furniture. Total EU imports increased by 30% in volume, but only by 2% in value mainly due to the rising exchange rate of the US dollar in the period under review. Furthermore, statistics indicated falling values for EU imports, resulting from lower prices of most furniture items.

Germany imports more than one quarter (28%) of all EU imports and is thereby the largest EU importer: 1,975 thousand tonnes, with a value of US$ 5,501 (or € 5,979) million in 2000. Germany is followed by France (15% of EU imports in 2000), the United Kingdom (14%), Belgium/Luxembourg (9%), The Netherlands (8%), Austria (7%), Sweden (4%), Spain (4%), Italy (4%) and Denmark (3%).
An overview of EU imports is shown below.

Table 5.1 Furniture imports by EU country, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**19,158,206**	**5,574,952**	**19,861,763**	**18,737,512**	**6,589,375**	**19,434,916**	**21,124,909**	**7,232,528**
Germany	6,319,665	**1,808,086**	6,121,734	5,775,221	**1,861,424**	5,501,310	5,979,685	**1,975,841**
France	2,701,421	**848,109**	2,898,183	2,734,135	**974,504**	2,917,352	3,171,035	**1,087,361**
United Kingdom	2,302,987	**690,350**	2,590,391	2,443,765	**944,253**	2,851,261	3,099,197	**1,081,279**
Belgium/Lux.	1,719,527	**452,434**	1,746,084	1,647,249	**475,636**	1,647,343	1,790,590	**494,616**
The Netherlands	1,598,483	**459,348**	1,615,809	1,524,348	**498,341**	1,511,013	1,642,405	**501,026**
Austria	1,179,787	**316,410**	1,258,813	1,187,559	**325,044**	1,259,911	1,369,469	**343,917**
Sweden	687,333	**200,171**	788,155	743,542	**251,020**	793,782	862,806	**276,240**
Spain	593,416	**199,110**	630,134	594,466	**189,803**	769,564	836,483	**240,848**
Italy	645,238	**229,262**	757,488	714,611	**286,826**	765,023	831,547	**334,832**
Denmark	593,432	**173,222**	564,117	532,186	**190,370**	578,954	629,298	**229,706**
Portugal	266,422	**68,224**	292,628	276,064	**81,961**	233,721	254,045	**67,338**
Finland	197,579	**45,676**	222,224	209,645	**52,137**	220,567	239,747	**59,767**
Ireland	171,436	**39,654**	188,235	177,580	**47,934**	205,289	223,140	**57,028**
Greece	181,478	**44,896**	187,769	177,141	**41,122**	179,833	195,471	**38,729**

Source: Eurostat (2002)

Intra-EU supplying countries

A detailed overview of Intra-EU and other sourcing countries of EU imports can be found in Appendix 2 (see - *EU imports by sourcing country*). In 2000, around 55% of EU imports came from other EU countries. The leading supplier was Italy, with 1,127 thousand tonnes, valued at US$ 2,922 (or € 3,176) million, representing 27% of total Intra-EU furniture supplies (see figure 5.1). Italy was followed by Germany, which accounted for 23% of Intra-EU furniture supplies in 2000. Recent trends in Europe indicate a strong growth in the flows to and from Eastern Europe and China.

Extra-EU supplying countries

Nowadays, around 45% of EU imports came from non-EU sources. With still enough forestry resources and low labour costs, Eastern European countries expanded their exports to the EU very rapidly in the past decade. In 2000, EU imports from these countries together, valued US$ 3,993 (or € 4,340) million, which represented 20% of total EU furniture imports.

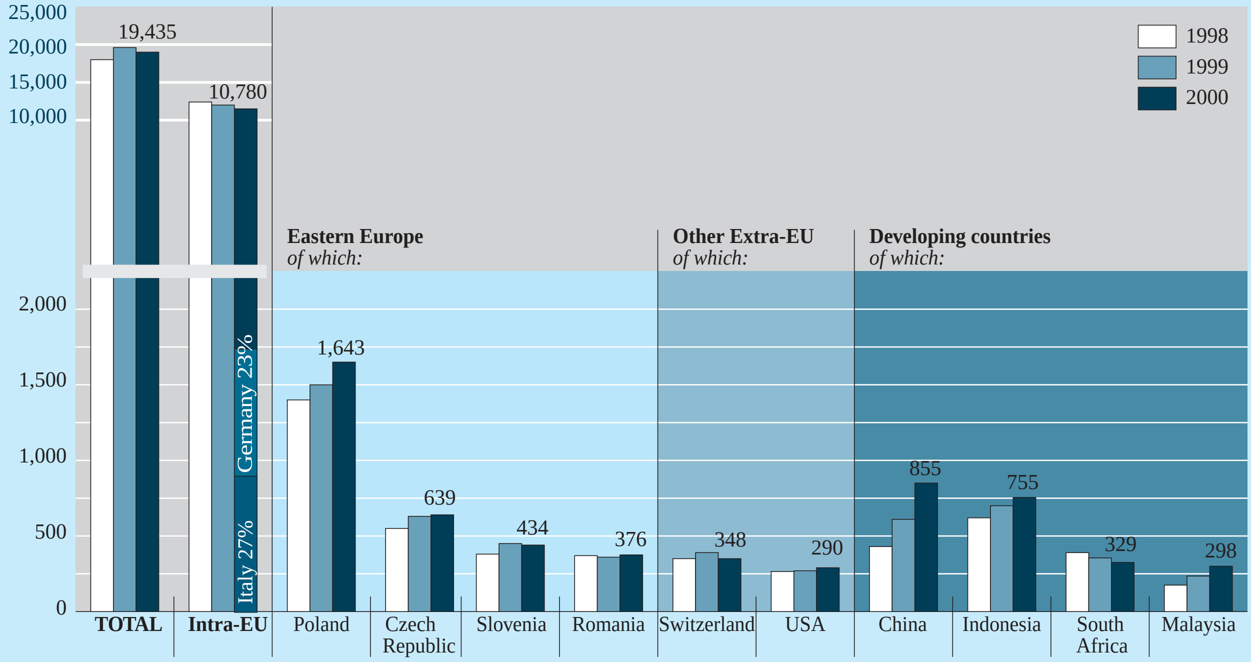
Next to imports of lower to medium priced furniture, EU manufacturers increasingly operate their production of furniture in higher quality woods here.
Large investments, technical and design expertise from EU manufacturers (mainly German) as well as freer access to the nearby EU market, all have stimulated this expansion. With the introduction of the Euro and possible EU membership of some Eastern European countries, further expansion of furniture trade is expected.

Poland is the largest Eastern European supplier to the EU and has a fast growing furniture industry, which is strongly dedicated to exports. Between 1998 and 2000, imports from Poland valued US$ 1,643 (or € 1,768) million and increased by 17% in value and 36% in volume terms (see figure 5.1). In the same period, supplies from other countries rose substantially, such as those from Czech Republic (+13% in value terms), Slovenia (+13%), Romania as well as from Hungary (+27%), Slovakia (+19%), Estonia (+14%) and Lithuania (+103%).

Developing countries

Large suppliers have also increased their exports of furniture to the EU in the past few years. In 2000, imports from China reached a value of US$ 855 (or € 929) million and have doubled both in value and volume terms between 1998 and 2000. Now China has become the largest supplier from developing countries. EU Imports from Indonesia increased by 22% in value terms, and imports from Malaysia, Vietnam and Thailand have doubled in the period under review. Most of these countries were able to benefit from the devaluation of their currencies relative to those in Europe, which resulted in lower prices for EU importers, especially in the UK. A detailed overview of EU furniture imports from developing countries to the EU can be found in Appendix 2.

Figure 5.1 Main suppliers of furniture to the EU, 1998-2000
Value in US$ million

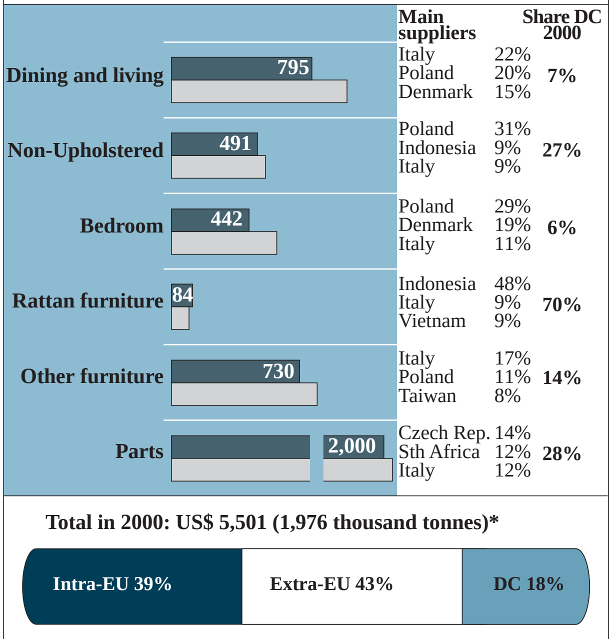


Source: Eurostat (2002)

Total imports by the selected markets within the EU
The figures below show the major trends and suppliers in each market. Appendix 2 gives more detailed tables with tendencies in imports by product group between 1998 and 2000 of these selected EU markets (see - *Imports by selected EU markets*).

Germany

Figure 5.2 German furniture imports 1998-2000 Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002) ▢ 1998 ■ 2000

Germany is the largest EU importer for furniture and accounted for 28% of total imports in 2000. In the same year, Germany imported 1,976 thousand tonnes with a value of US$ 5,501 (or € 5,979) million.

As is shown in figure 5.2, around 43% of imports came from Extra-EU sources. Between 1998 and 2000, German imports decreased by 15% in terms of value, which gives a slightly distorted view due to the rising exchange rate of the US$.

Whereas in terms of volume, imports of all product groups increased, except for bedroom and rattan furniture. Imports of furniture parts valued US$ 2,000 (or € 2,174) million, thereby representing more than one third of the German total, which were mainly sourced from Czech Republic, South Africa and Italy.

The main suppliers of furniture to Germany are Poland (32% of total volume of imports) and Italy (12%). Other suppliers include Czech Republic (8%), Denmark (5%) and Austria (4%).

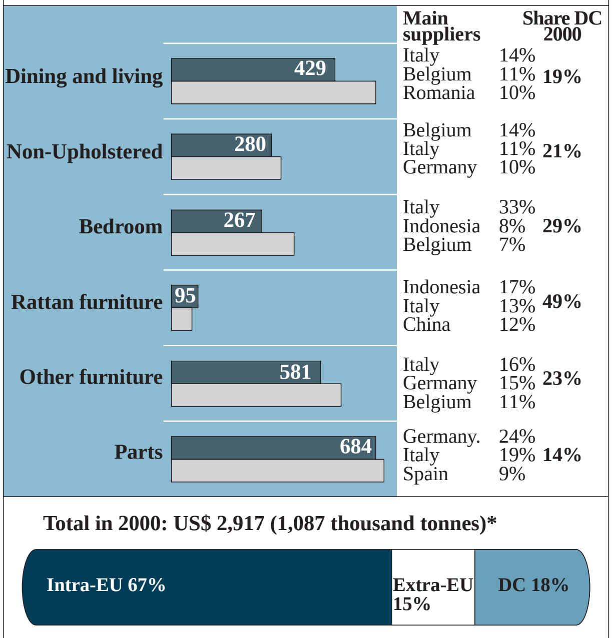
Between 1998 and 2000, supplies from Eastern European countries to Germany showed an increasing tendency, slightly at the expense of Italy (falling imports of upholstered furniture) and Denmark.

The main suppliers to Germany by product group are shown in figure 5.2, with the share of developing countries for each group.

In 2000, imports from developing countries valued US$ 1,001 (or € 1,088) million and accounted for 18% of furniture supplies to Germany. Between 1998 and 2000 imports from developing countries increased by 41% in terms of volume. Major suppliers include Slovenia, South Africa, China, Indonesia, Turkey, Brazil, Thailand, Vietnam and Mexico. The kind of furniture imported from these countries are mainly within the product groups mentioned in figure 5.2.

France

Figure 5.3 French furniture imports 1998-2000 Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002) ▢ 1998 ■ 2000

France accounted for 15% of EU imports of furniture in 2000, a total volume of 1,087 thousand tonnes, valued at US$ 2,917 (or € 3,171) million.

France imported more than three-quarters from other EU countries and only 15% from Extra-EU sources, while 18% came from developing countries.

French imports of furniture increased by 30% in volume terms between 1998 and 2000, while the value of imports rose by 17%.

Particularly demand for dining and living room, rattan, other furniture and parts has grown, as is shown in figure 5.3.

In 2000, most French imports of furniture came from Italy (19% of total volume of imports), Germany (13%), Belgium (11%), Spain (9%) and Eastern European (Romania, Poland) sources.

Supplies from all these countries, especially upholstered furniture from Italy and kitchen furniture from Germany, increased in the period under review.

The main suppliers by product group are shown in figure 5.3, with the share of developing countries for each group.

Imports from developing countries valued US$ 528 (or € 573) million in 2000 and rose by 52% in terms of volume. China and Indonesia represented 6% and 3%, respectively of total furniture supplies to France and were important suppliers of rattan and other furniture.

Between 1998 and 2000, imports from China rose by 55% (by volume), while Indonesia increased their furniture supplies to France by 27%. Other significant suppliers include Brazil, Turkey, Vietnam, Thailand and Malaysia.

United Kingdom

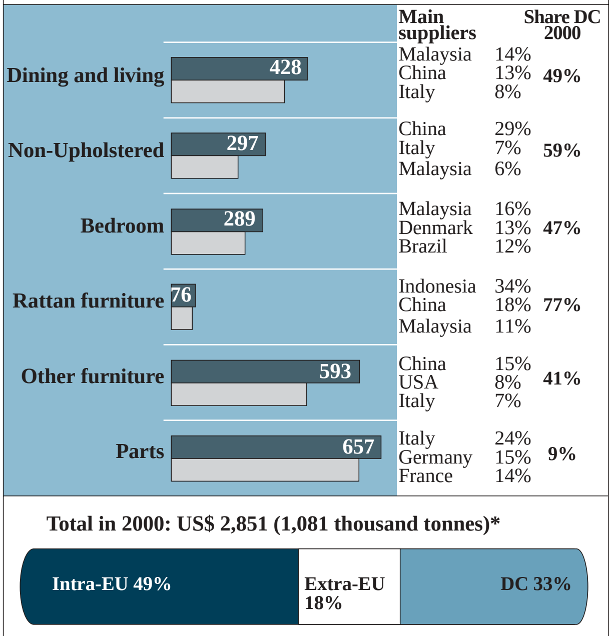
The United Kingdom accounted for 14% of EU imports of furniture in 2000. Imports amounted to 1,081 thousand tonnes, with a value of US$ 2,851 million.

British importers sourced around 18% of their requirements in Extra-EU countries, while much (33%) is being imported from developing countries, as is shown in figure 5.4.

Between 1998 and 2000, UK imports rose by 57% in volume terms, as importers could benefit from the strength of the Pound Sterling.

In terms of volume, imports of all product groups increased, especially those of non-upholstered seating (+70%), bedroom (+64%), dining and living (48%) and other furniture (+150%).

Figure 5.4 UK furniture imports 1998-2000
Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002)

It should be noted here that around 20% of UK imports is re-exported to the USA and other EU countries.

The main suppliers of furniture to the United Kingdom are Italy (14% of total volume of imports), Belgium (13%), Germany (7%), France (3%) and Denmark (3%). Other suppliers include Poland (4%), Taiwan (3%) and USA (3%).

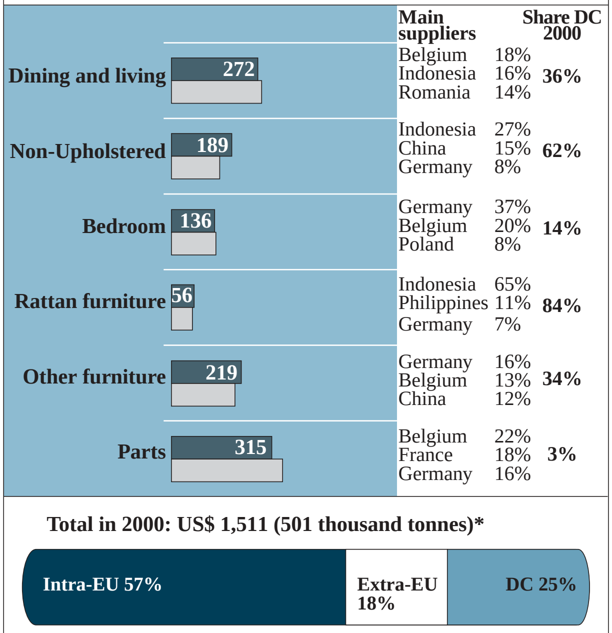
The main suppliers by product group are shown in figure 5.4, with the share of developing countries, which is higher for each group compared to the other selected EU markets.

UK imports of furniture from developing countries valued US$ 933 (or € 1,014) million, an increase of 66% over 1998 imports. In terms of volume, imports from developing countries increased by 90% between 1998 and 2000. This were mainly imports of non-upholstered seating and other furniture from China and Malaysia now representing 12% and 7% of total furniture supplies to the UK.

Other leading furniture suppliers from developing countries include South Africa (4%), Indonesia (3%), Vietnam (2%), Brazil, India, Philippines and Mexico.

The Netherlands

Figure 5.5 Netherlands furniture imports 1998-2000
Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002) ▢ 1998 ■ 2000

In 2000, imports amounted to 501 thousand tonnes, with a value of US$ 1,511 (or € 1,642) million.

The Netherlands accounted for 8% of EU imports of furniture in 2000, a relative high share due to its size, which can be partly attributed to sizeable re-exports to other EU countries (roughly 15% in 2000).

The Netherlands imported 57% from other EU countries, 18% from Extra-EU sources, while 25% came from developing countries.

Between 1998 and 2000, Dutch imports of furniture increased by 9% in terms of volume.

Except rattan and kitchen furniture, all product groups especially, non-upholstered seating and other furniture were more in demand.

Most furniture came from Germany (21% of total volume of imports) and Belgium (18%), while other suppliers include Romania (6%), Poland (6%), Italy (4%), France (3%) and Denmark (3%). See figure 5.5 for the main suppliers by product group.

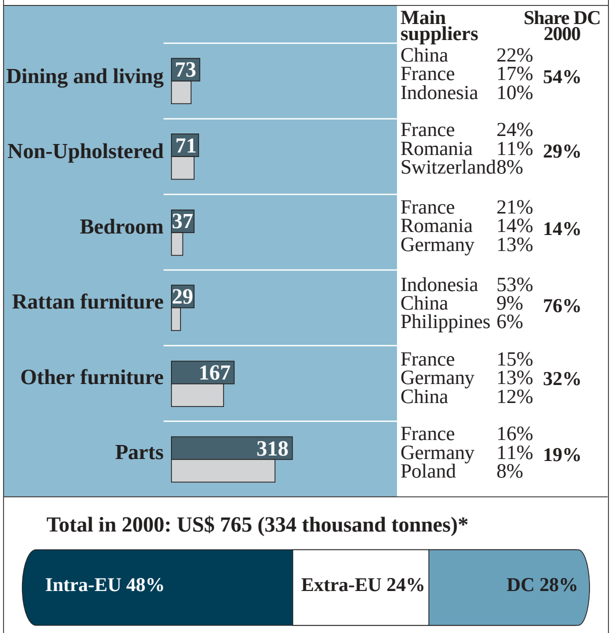
In 2000, imports from developing countries valued US$ 382 (or € 415) million and accounted for one quarter of furniture supplies to The Netherlands.

Between 1998 and 2000 imports from developing countries increased by 32% in terms of volume, which were mainly dining and living room and other furniture from Indonesia (10% of all furniture supplies) and China (7%).

In the period under review imports from China rose by 50%. Other suppliers include Brazil (4%), Vietnam (2%), Malaysia, Thailand, Philippines, India, Slovenia, South Africa, Turkey and Mexico.

Italy

Figure 5.6 Italian furniture imports 1998-2000
Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002) ▢ 1998 ■ 2000

Domestic demand for furniture is mainly covered by Italian production. Nevertheless, Italy imported 334 thousand tonnes with a value of US$ 765 (or € 831) million in 2000. Around 48% of imports was sourced inside the EU, while 28% came from developing countries (see figure 5.6).

Between 1998 and 2000, Italian imports of furniture increased by 46% in terms of volume, as production has been more shifted to other countries. As the largest EU manufacturer, Italy imports many parts (almost half of Italian imports). Non-upholstered seating, dining and living room, bedroom, rattan and other furniture (+56%) have been more in demand during the period under review.

In 2000, most Italian imports of furniture came from France (14% of total volume of imports). Other suppliers were Romania (11%), China (11%), Germany (7%), Spain (6%), Slovenia (5%), Croatia (5%), Slovakia (4%), Indonesia (4%), Switzerland (4%) and Austria (4%).

Imports of furniture from developing countries valued US$ 213 (or € 231) million, an increase of 48% over 1998 imports. In terms of volume, imports from developing countries increased by 62% between 1998 and 2000. Next to China, Indonesia and Slovakia, important suppliers were Thailand, India, Vietnam and Philippines.

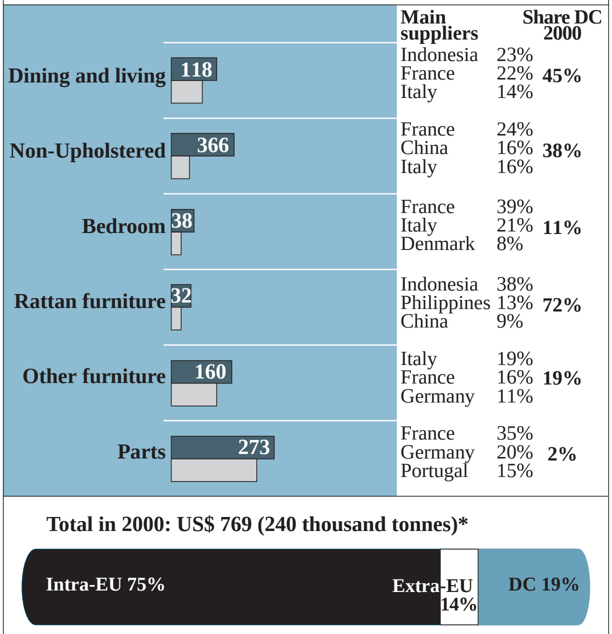
Spain

In 2000, Spanish imports of furniture were 340 thousand tonnes, or US$ 769 (or € 836) million, representing 4% of total EU imports, since most of Spanish furniture demand is covered by domestic production.

Spain imported around three-quarters from other EU countries and only 6% from Extra-EU sources, while 19% came from developing countries. Between 1998 and 2000, Spanish imports of furniture increased by 20%, especially of parts (for being a large manufacturer), dining and living room furniture, non-upholstered seating and other furniture. France (26%) is the main supplier to Spain. Other suppliers include Italy (15%), Indonesia (9%), China (9%), Germany (9%), Portugal (7%), UK (4%), Sweden (2%), Mexico (2%), Belgium (2%) and Denmark (2%).

Imports of furniture from developing countries valued US$ 147 (or € 160) million. In terms of volume, imports from developing countries rose by 82% during the period under review. Next to Indonesia and China, important suppliers from developing countries include Mexico, Vietnam, Philippines, Brazil, Thailand and India.

Figure 5.7 Spanish furniture imports 1998-2000
Value in US$ million



NOTE: - Extra-EU excluding developing countries (=DC)
- *Including upholstered and kitchen furniture

Source: Eurostat (2002) ▢ 1998 ■ 2000

Table 5.2 Imports by selected EU markets by product group, 2000

Product group	EU imports US$ million	Imports by selected EU market As percent of total value				
Dining and living	2,831	Germany (28%)	France (15%)	UK (15%)	NL (10%)	Spain (4%)
Upholstered seating	2,803	Germany (32%)	France (16%)	UK (15%)	NL (7%)	Italy (2%)
Bedroom furniture	1,635	Germany (27%)	France (17%)	UK (18%)	NL (8%)	Spain (2%)
Non-upholstered seating	1,797	Germany (27%)	France (15%)	UK (17%)	NL (11%)	Italy (4%)
Kitchen furniture	759	Germany (12%)	France (19%)	UK (11%)	NL (18%)	Spain (5%)
Rattan furniture	467	Germany (18%)	France (20%)	UK (16%)	NL (12%)	Spain (7%)
Other furniture	3,359	Germany (22%)	France (17%)	UK (18%)	NL (7%)	Italy (5%)
Parts	5,832	Germany (34%)	France (12%)	UK (11%)	NL (5%)	Italy (6%)

Note: NL = The Netherlands

Source: Eurostat (2002)

5.2 Imports by product group

Selected EU markets by product group
As is shown in table 5.2, Germany is the largest importer of each product group in 2000, with the exception of kitchen furniture. Here, France and The Netherlands were large importers in that year compared to the other selected EU markets.

EU total by product group
The main product groups of furniture, imported by the EU between 1998 and 2000 are shown in table 5.3. Dining and living, upholstered and non-upholstered furniture together formed more than one third (38%) of the EU total. The category *other furniture* is a sizeable product group, which grew substantially in the period under review and accounted in 2000 for 18% of the value of EU imports (21% in terms of volume). Another large category of relevance for exporters from developing countries, are *furniture parts* which represented almost one third of EU imports.

More than half of EU imports comes from intra-EU sources. Developing countries accounted for 20% of the total value and their share in supplies of upholstered seating and kitchen furniture were rather low (around 5%). Therefore only product groups, which are relevant to exporters from developing countries are described in this section.

With regards to raw materials, wooden furniture, especially used for dining chairs and tables, living room, bedroom furniture as well as side, coffee and low tables, accounted for nearly three-quarters of EU imports in 2000. Imports of metal chairs and tables, especially from Indonesia, China and the Philippines have grown in importance.

A breakdown of product groups in detail (in terms of materials), imported by the EU can be found in Appendix 2 (see - *EU Imports by product group detailed*). Import statistics for each separate product group and specific information about supplies from developing countries can be found in Appendix 2 as well (see - *EU imports of selected product groups by source*).

Non-upholstered seating
Demand for non-upholstered seating in the EU has increased. In 2000, this product group accounted for 9% of total EU imports, representing a value of US$ 1,797 million. More than one third of non-upholstered seating came from other EU countries, especially from Italy (13% of total supplies) Germany (5%), France (5%), followed by Spain (4%), The Netherlands (4%) and Belgium (4%).

Table 5.3 EU furniture imports by product group, 1998 - 2000
Tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**19,158,206**	**5,574,952**	**19,861,763**	**18,737,512**	**6,589,375**	**19,434,916**	**21,124,909**	**7,232,528**
Intra-EU	12,155,539	**3,168,593**	11,898,555	11,225,052	**3,710,083**	10,780,933	11,718,405	**3,757,043**
Extra-EU	7,002,667	**2,406,359**	7,963,208	7,512,460	**2,879,292**	8,653,984	9,406,504	**3,475,485**
Developing countries	2,865,168	**864,541**	3,390,346	3,198,440	**1,116,658**	3,874,832	4,211,774	**1,362,371**
Dining and living	3,033,546	**992,783**	2,985,760	2,816,755	**1,188,217**	2,831,459	3,077,673	**1,467,539**
Upholstered seating	2,786,637	**520,844**	2,862,561	2,700,529	**639,302**	2,752,309	2,991,640	**625,739**
Non-upholstered seating	1,683,674	**532,977**	1,785,164	1,684,117	**631,252**	1,796,933	1,953,188	**667,691**
Bedroom furniture	1,763,819	**698,942**	1,756,945	1,657,495	**754,221**	1,635,086	1,777,267	**828,983**
Kitchen furniture	860,233	**261,702**	860,129	811,442	**386,623**	759,857	825,932	**291,366**
Rattan furniture	456,000	**118,304**	465,374	439,032	**127,097**	467,108	507,726	**151,822**
Other furniture	3,114,302	**1,099,307**	3,386,424	3,194,740	**1,420,041**	3,359,821	3,651,979	**1,535,557**
Parts	5,459,996	**1,350,093**	5,759,406	5,433,402	**1,442,622**	5,832,344	6,339,504	**1,663,831**

Source: Eurostat (2002)

China and Poland are other main suppliers to the EU, which increased their supplies during the period under review. Particularly supplies from developing countries rose enormously, which apparently has been at the expense of Italy, with falling supplies (- 17%), as is shown below.

Non-upholstered seating *Main suppliers:*
→ **Intra-EU 37% (especially from Italy)**
→ **China 13%**
→ **Poland 11%**

EU imports in 2000: US$ 1,797 million
667,691 tonnes

Tendency EU imports between 1998 and 2000 → increase by 25% from 532,977 to 667,691 tonnes

	Increasing supplies from:		*Decreasing supplies from:*	
Main suppliers:	Poland	(+ 16%)	Italy	(- 17%)
	Germany	(+ 13%)		
Developing countries:	China	(+ 82%)		
	Indonesia	(+ 26%)		
	Vietnam	(+ 96%)		
	Malaysia	(+ 62%)		
	Thailand	(+ 61%)		
	Slovenia	(+ 21%)		
	Brazil	(+ 65%)		
	Philippines	(+ 31%)		
	South Africa	(+ 61%)		
	Turkey	(+ 91%)		

The category of non-upholstered seating not only covers wooden and metal seats, but also seats of other material and seats, which can be converted into beds. In terms of value, wooden seats form 42% of EU imports. However, in terms of volume they accounted for 35% of total imports of non-upholstered seating, as is shown below.

Within this product group, EU imports of wooden and metal seats showed the largest growth. Between 1998 and 2000, EU imports of *wooden seats* increased in volume by 24%, most of which came from Indonesia (21% of total volume of imports), Italy (15%), Vietnam (7%), Poland (5%), China (5%), Malaysia (4%), Romania, Slovenia and Croatia. Lower prices as a result of the currency devaluation in Asian sources and more demand for wooden (teak) furniture were the major reasons.

In the same period, EU imports of *metal seats* increased by 51%, reaching a volume of 193 thousand tonnes, while in value the increase was 29%. Metal furniture has grown in popularity in all selected countries and China and Italy accounted for almost half of total supplies to the EU. Other important supplying countries include Germany, Spain and Denmark. Non-EU countries, like Czech Republic, USA, Romania, Thailand, Taiwan, Indonesia, Malaysia and the Philippines have become significant suppliers of metal seats to the EU.

Table 5.4 EU imports of seats by raw material

Non-upholstered seating	*Volume*	*Percent*	*Value*	*Percent*
wood	233	35%	754	42%
metal	193	29%	377	21%
Other seats	140	21%	395	22%
Seats convertible into beds	100	15%	269	15%
Total	**667**	**100%**	**1,796**	**100%**

Note: EU imports of 2000 are given in 1,000 tonnes and US$ million.

Source: Eurostat (2002)

Between 1998 and 2000, imports of the category *other seats* showed an increase in terms of volume (+18%) and are mainly sourced in Italy, France, Germany, The Netherlands, Spain, China, USA, Poland and Indonesia. EU imports of *seats convertible into beds* have increased slightly (+ 2%) and are sourced mainly in Poland, France, Germany, Italy, Slovakia, Estonia, Slovenia and Turkey.

Dining and living room furniture

This product group includes wooden living room sets, dining tables and chairs, cocktail-, coffee- and end tables. Between 1998 and 2000, imports of dining and living room furniture increased by 48% in terms of volume reaching a total of 1,467 thousand tonnes with a value of US$ 2,831 million. In 2000, the value of dining and living room furniture imports represented 15% of the EU total and 20% in terms of volume.

Other EU countries (especially Italy, Denmark and Germany) supplied 53% of EU imports of dining and living room furniture, as is shown in figure 5.8. Poland, Indonesia, Romania, China, Malaysia and Brazil are other significant suppliers, all of which increased their supplies to the EU between 1998 and 2000. EU imports from developing countries rose by 53%, especially China, Malaysia, Thailand and Vietnam increased their supplies to the EU, as is shown below. Apart from these and Eastern European countries, other important suppliers from developing countries were, Turkey, Tunisia, Pakistan and Morocco.

It is expected that the consumption of this type of furniture will still increase further, with market potential for dining tables and chairs. A major reason is an ongoing shift from classic style to contemporary and modern rustic style furniture in most of the selected EU markets.

Dining and living

Main suppliers:
→ **Intra-EU** **53% (especially from Italy)**
→ **China** **9%**
→ **Poland** **6%**

EU imports in 2000: **US$ 2,831 million**
1,467,539 tonnes

Tendency EU imports between 1998 and 2000 → increase by 48% from 992,783 to 1,467,539 tonnes

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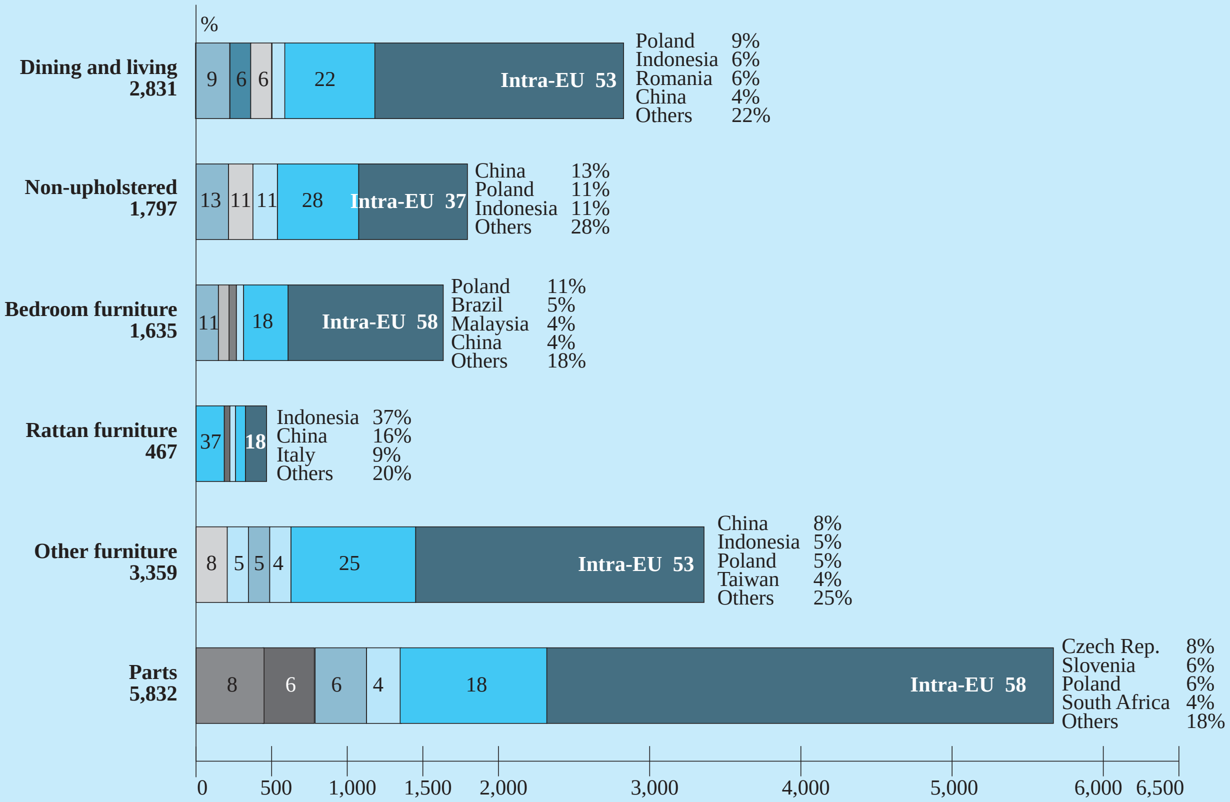
	Increasing supplies from:		***Decreasing supplies from:***	
Main suppliers:	Italy	(+ 157%)	Denmark	(- 8%)
	Poland	(+ 31%)		
Developing countries:	Indonesia	(+ 27%)	Mexico	(- 7%)
	China	(+ 112%)	Ghana	(- 1%)
	Malaysia	(+ 97%)		
	Brazil	(+ 57%)		
	India	(+ 39%)		
	Thailand	(+ 76%)		
	Vietnam	(+ 81%)		
	Slovenia	(+ 24%)		
	South Africa	(+ 36%)		
	Philippines	(+ 22%)		
	Egypt	(+ 30%)		

Figure 5.8 **EU furniture imports by product group, 2000**
Main suppliers as percent of total value (in US$ million)



Source: Eurostat (2002)

Bedroom furniture
In 2000, bedroom furniture represented 8% of all EU imported furniture with a total value of US$ 1,635 million. More than half of total EU imports of bedroom furniture came from other EU countries, especially from Germany which accounted for 14% of total supplies to the EU. Germany is followed by Denmark (11%), Italy (9%), France (6%), Belgium (5%), Sweden (3%) and Spain. Poland and Brazil are other main suppliers to the EU, which increased their supplies during the period under review. Particularly supplies from developing countries rose enormously, which apparently has been at the expense of Denmark. Although supplies from African countries, Tunisia and Oman also showed a declining tendency, as is shown below.

Bedroom furniture includes beds, wardrobes, bedroom furniture for babies and kids, bedside tables and drawer sets. *Bedroom furniture- made of wood* dominates EU imports, as is shown in figure 5.9.

Between 1998 and 2000, the volume of EU imports wooden bedroom furniture increased by 17% from 642 to 754 thousand tonnes. In 2000, 63% of wooden bedroom furniture imports came from other EU countries, where Germany, Denmark, and Italy were the main Intra-EU suppliers. Poland and Brazil were significant non-EU suppliers within this category. Imports of metal bedroom furniture rose more significantly by 33%, partly because of the growing popularity of classic/baroque style beds with frames of wrought iron. China, Malaysia, Taiwan and USA are leading countries for metal beds.

Bedroom furniture

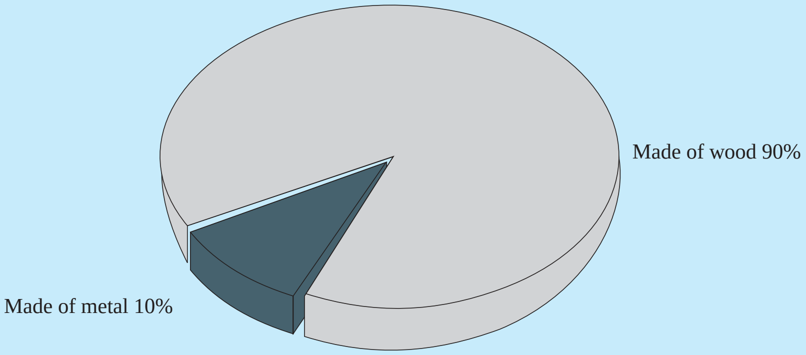
EU imports in 2000: US$ 1,635 million
828,983 tonnes

Main suppliers:
→ **Intra-EU 58% (especially from Italy)**
→ **China 11%**
→ **Poland 5%**

Tendency EU imports between 1998 and 2000 → increase by 19% from 698,942 to 828,983 tonnes

	Increasing supplies from:		***Decreasing supplies from:***	
Main suppliers:	Germany	(+ 4%)	Denmark	(- 16%)
	Poland	(+ 28%)		
Developing countries:	Brazil	(+ 61%)	South Africa	(- 2%)
	China	(+ 183%)	Zimbabwe	(- 122%)
	Malaysia	(+ 185%)	Tunisia	(- 10%)
	Slovenia	(+ 5%)	Oman	(- 106%)
	Indonesia	(+ 29%)		
	Vietnam	(+ 407%)		
	Philippines	(+ 15%)		
	India	(+ 91%)		
	Turkey	(+ 33%)		
	Thailand	(+ 579%)		

Figure 5.9 EU imports of bedroom furniture by raw material, 2000
As percent of total volume (= 828,923 tonnes)



Source: Eurostat (2002)

Rattan furniture (of cane, osier, bamboo)
In trade statistics a distinction is made between two sub-product groups: *rattan seats* and *rattan furniture*, made of cane, osier, bamboo or other materials.
The term “rattan seats” includes armchairs, chairs and sofas (all seating furniture), while the term “rattan furniture” refers to chests of drawers, sideboards, wardrobes and tables.

Between 1998 and 2000, imports of *rattan seats* increased by 16% in terms of volume to a total of 58 thousand tonnes with a value of US$ 206 million. In the same period, EU imports of *rattan furniture* increased more importantly by 38% (in terms of volume). Most of the *rattan seats* came from Indonesia who accounted for 68% of EU imports in 2000 within this category. Other significant suppliers of rattan seats were the Philippines, Vietnam, China, Malaysia and Thailand. The main suppliers of *rattan furniture* to the EU are Indonesia, China, but also Italy, Germany, France, Spain and The Netherlands.

During the period under review, EU imports of both rattan seats and furniture increased by 28%, as is shown below. Imports from other EU countries (Germany and Spain), Taiwan and most of the developing countries, especially China, Vietnam, Malaysia, Thailand and Mexico increased their exports to the EU. Supplies from Indonesia declined due to falling rattan prices because of the devaluation of the ruppiah.

France was the largest EU importer of rattan furniture and accounted in 2000 for 20% of total EU imports. French imports are followed in significance by Germany (18%), United Kingdom (16%), The Netherlands (12%), Belgium (8%), Spain (7%), Italy (6%), Austria (3%), Denmark (3%), Sweden (2%), Greece (1%) and Finland (1%).

Table 5.5 EU imports of furniture of cane, osier, bamboo

Furniture of cane, osier, bamboo	*Volume*	*Percent*	*Value*	*Percent*
Rattan seats	58	38%	206	44%
Rattan furniture	93	62%	261	56%
Total	**151**	**100%**	**467**	**100%**

Note: EU imports of 2000 are given in 1,000 tonnes and US$ million.

Source: Eurostat (2002)

Rattan furniture *Main suppliers:*
→ **Intra-EU 37% (especially from Italy)**
→ **China 16%**
→ **Poland 9%**

EU imports in 2000: US$ 467 million
151,822 tonnes

Tendency EU imports between 1998 and 2000 → increase by 28% from 118,304 to 151,822 tonnes

	Increasing supplies from:		*Decreasing supplies from:*	
Main suppliers:	Germany	(+ 44%)	Italy	(- 9%)
	Taiwan	(+ 193%)	France	(- 2%)
	Spain	(+ 27%)		
Developing countries:	China	(+ 43%)	Indonesia	(- 3%)
	Vietnam	(+ 76%)	Philippines	(- 7%)
	Malaysia	(+ 151%)	Turkey	(- 39%)
	Thailand	(+ 84%)	Tunisia	(- 27%)
	Myanmar	(+ 32%)		
	India	(+ 3%)		
	Morocco	(+ 18%)		
	South Africa	(+ 27%)		
	Mexico	(+ 136%)		

Other furniture

Demand for other furniture in the EU has increased substantially. In 2000, this product group accounted for 17% of total EU imports, representing a value of US$ 3,359 million. Other EU suppliers (especially Germany, Italy, France and Spain) accounted for 53% of the total EU imports of this product group. Imports from China, Malaysia, India and Turkey have more than doubled between 1998 and 2000. Indonesia, Poland, Taiwan, USA, Romania, Czech Republic, Thailand, Vietnam, South Africa and Slovenia were also significant suppliers, most of which increased their exports to the EU, as is shown below. Apart from these and other Eastern European countries, suppliers from developing countries growing in importance were Mexico, Tunisia (metal), Bolivia, Morocco, Myanmar, Egypt and Chile.

The category *other furniture* includes: cupboards, bookshelves, storage/wall units and occasional furniture, like small tables, desks, small seats, mirrors, coat stands etc. Trade statistics only distinguishes this category in terms of the materials used, which can be wood, metal or plastic. In terms of value, *other furniture-made of wood* forms the largest part of EU imports (46%), whereas on a volume basis *other furniture-made of metal* has become nearly as important, as is shown in figure 5.10.

Other furniture

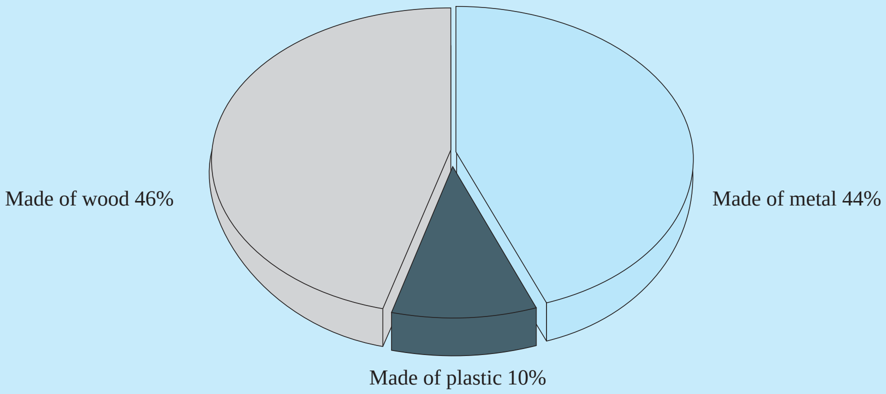
EU imports in 2000: US$ 3,359 million
1,535,557 tonnes

Main suppliers:
→ **Intra-EU 53% (especially from Italy)**
→ **China 8%**
→ **Poland 5%**

Tendency EU imports between 1998 and 2000 → increase by 40% from 1,099,307 to 1,535,557 tonnes

	Increasing supplies from:		***Decreasing supplies from:***	
Main suppliers:	Germany	(+ 11%)	Italy	(- 1%)
	Poland	(+ 68%)	France	(- 14%)
	Spain	(+ 19%)		
Developing countries:	China	(+ 112%)	Philippines	(- 14%)
	Indonesia	(+ 44%)		
	Malaysia	(+ 219%)		
	Vietnam	(+ 39%)		
	Brazil	(+ 78%)		
	India	(+ 126%)		
	Slovenia	(+ 4%)		
	South Africa	(+ 1%)		
	Turkey	(+ 184%)		

Figure 5.10 EU imports of other furniture by material, 2000
As percent of total volume (= 1,535,557 tonnes)



Source: Eurostat (2002)

Due to its rising popularity, especially in contemporary style furniture the volume of EU imports of *other furniture-made of metal* increased by 67% in the period under review, reaching 675 thousand tonnes, while in value, the increase was 20%.

In the same period, EU imports of *other furniture-made of wood* increased in volume by 26% (and 4% by value). EU imports of this category of furniture *made of plastic* increased as well by 12% both in terms of volume and value.

Germany was the largest EU importer and accounted for 22% of total EU imports, followed by the United Kingdom (18%), France (17%), The Netherlands (7%), Belgium (7%), Austria (7%), Italy (5%), Spain (4%) and Denmark (4%).

In general, it is expected that the consumption of this category of furniture will increase further in most of the selected EU countries, because of demand for wall units, room dividers and small desks for home office use is expected to continue in the coming years.

Parts of furniture

Parts (i.e. parts of seats and of furniture) form the largest proportion of EU furniture imports. With a sustained tendency towards outsourced production by EU manufacturers, *parts* continue to be a growing category within the international furniture trade. In 2000, parts represented 30% of EU furniture imports and accounted for a total value of US$ 5,832 million. Within this product group *parts of seats-metal* form the largest share (60%) in EU imports in terms of value, as is shown below. Seats with a metal frame have been popular since 1998. Compared to wooden parts, metal has the advantages of being more durable, fashionable and lighter in weight.

Between 1998 and 2000, EU imports of *parts of seats-metal* showed an increase of 20%, reaching a volume of 515 thousand tonnes, valued at US$ 3,499 million.
In the same period imports of *parts of seats-wood* increased by 19% from 68 to 83 thousand tonnes.
EU imports of *parts of furniture* increased, particularly *parts of furniture-metal* (58% in terms of volume).

In 2000, around 58% of parts came from other EU countries, as is shown in figure 5.8. However, between 1998 and 2000, imports from non-EU countries, especially from developing countries have increased by 42% in volume terms, from 117 to 167 thousand tonnes. Germany, Italy and France are major suppliers, followed by Czech Republic (+47%), Slovenia (+29%), Poland (+62%) and South Africa (-12%).

Other important suppliers from developing countries were Thailand (+305%), Turkey (+21%), China (+91%), Indonesia (+10%), Malaysia (+113%), Mexico, Brazil, India, Vietnam, Philippines, Tunisia (metal), Pakistan, South Korea, Honduras, Chile, Morocco, Albania, Myanmar, Uruguay and Ghana.

Within the EU, Germany was the largest importer and accounted for 34% of total EU imports, followed by France (12%), United Kingdom (11%), Belgium (8%), Austria (8%), Italy (6%), The Netherlands (5%), Sweden (5%), Spain (5%) Denmark (2%) and Finland (2%).

Table 5.6 EU imports of parts of furniture by raw material

Parts	*Volume*	*Percent*	*Value*	*Percent*
Parts of seats, wood	83	5%	175	3%
Parts of seats, metal	515	31%	3,499	60%
Parts of furniture, wood	615	37%	1,108	19%
Parts of furniture, metal	316	19%	699	12%
Other parts of furniture	133	8%	349	6%
Total	**1,663**	**100%**	**5,832**	**100%**

Note: EU imports of 2000 are given in 1,000 tonnes and US$ million.

Source: Eurostat (2002)

5.3 The role of developing countries

Since the mid 1980s, the role of developing countries in the supply of furniture has become more important. Some emerging economies in Asia and Latin America, with forestry resources and low labour costs, have set up their furniture industry, strongly dedicated to exports. In 2000, China, Indonesia, Malaysia, Vietnam and Brazil together accounted for almost 14% of total EU imports (by volume). Particularly China and Malaysia increased their furniture exports to the EU. The other developing countries are currently expanding their exports, although it will take a long time for them to obtain a significant position in the international furniture trade, because:

- Most developing countries do not have a well-established furniture industry. Production capacity, the level of technology, product innovations and variety in design are limited.
- Next to rattan or some simple wooden furniture and RTA furniture, some developing countries exported some classic-style or reproduction furniture to the USA. But in terms of size and style, this latter type of furniture does not comply with the demanding and diverse EU market.
- EU manufacturers continue to contract to foreign manufacturers in Eastern European countries, which are much closer and more flexible in terms of meeting their specific requirements.
- EU importers are increasingly asking for certification e.g. FSC (Forest Stewardship Council), a guarantee for good forest management (see EU Strategic Guide ‘Domestic furniture’ Chapter 1.3).

Nevertheless, between 1998 and 2000, the share from developing countries in total EU furniture imports rose from 15 to 19% in volume terms. In 2000, EU furniture imports from developing countries was 1,362 thousand tonnes, representing a value of US$ 3,875 (or € 4,212) million, a 58% volume increase over 1998. Around 75% is sourced from Asia with rising tendencies in most countries, as shown below.

Table 5.7 Largest increases in supplies of furniture from developing countries to the EU, 1998-2000
Tonnes and US$ 1,000

	1998		1999		2000		volume increase %
	value US$	volume	value US$	volume	value US$	volume	1998-2000
Total	**19,158,206**	**5,574,952**	**19,861,763**	**6,589,375**	**19,434,916**	**7,232,528**	**+ 29%**
Dev. countries	**2,865,168**	**864,541**	**3,390,346**	**1,116,658**	**3,874,832**	**1,362,371**	**+ 58%**
Asia	***1,599,465***	***582,536***	***2,057,291***	***776,424***	***2,525,408***	***981,078***	***+ 63%***
China	429,883	208,706	612,365	299,132	855,224	415,134	**+ 99%**
Indonesia	621,625	191,869	702,388	217,293	755,748	234,360	**+ 23%**
Malaysia	161,795	63,889	236,616	104,235	298,428	136,543	**+ 112%**
Vietnam	103,298	41,880	135,051	57,877	192,083	80,075	**+ 91%**
Thailand	125,147	35,426	202,658	48,803	243,449	58,406	**+ 65%**
India	65,184	20,693	75,688	28,144	89,374	34,937	**+ 69%**
Philippines	73,396	16,145	73,282	16,495	66,432	15,679	**- 3%**
Latin America	***242,427***	***87,525***	***262,448***	***109,329***	***296,171***	***129,530***	***+ 47%***
Brazil	163,126	66,498	182,090	85,138	211,804	106,362	**+ 59%**
Mexico	64,183	17,143	59,129	17,929	58,304	16,624	**- 3%**
Argentina	1,387	484	1,492	656	5,340	2,043	**+ 322%**
Chile	3,698	1,260	4,209	1,711	4,456	1,573	**+ 25%**
Bolivia	1,334	362	5,263	1,392	2,761	508	**+ 40%**
Africa	***414,242***	***49,927***	***373,138***	***63,055***	***346,323***	***58,956***	***+ 18%***
South Africa	391,989	41,030	356,184	56,362	328,705	52,333	**+ 27%**
Ghana	8,670	2,147	7,447	1,913	7,577	2,107	**- 2%**
Zimbabwe	5,936	2,483	4,773	2,057	3,778	1,571	**- 58%**
Mediterranean and Middle East	***130,595***	***27,404***	***150,800***	***34,609***	***160,238***	***43,673***	
Turkey	93,128	15,589	111,822	21,238	114,330	26,160	**+ 68%**
Tunisia	15,474	5,693	15,385	5,437	17,916	6,913	**+ 21%**
Morocco	7,504	2,753	9,598	4,023	11,643	5,933	**+115%**
Egypt	9,307	2,443	10,694	3,205	10,960	3,474	**+ 42%**

Source: Eurostat (2002)

Detailed import statistics of the total furniture supplies by developing countries to the EU can be found in Appendix 2. Statistics for EU imports of each individual product group are also given in Appendix 2 and supplies from developing countries are emphasised.

Between 1998 and 2000, the EU has imported more dining and living room, bedroom and other furniture as well as more non-upholstered seating from developing countries. Imports of parts, which represented the largest part of their supplies has increased slightly. The share of each product group and the major supplying developing countries are shown in table 5.8.

The share of developing countries was highest in supplies of rattan furniture to the EU, which slightly increased between 1998 and 2000. In the same period, the share of developing countries in the supply of all other product groups increased, as is shown in figure 5.11.

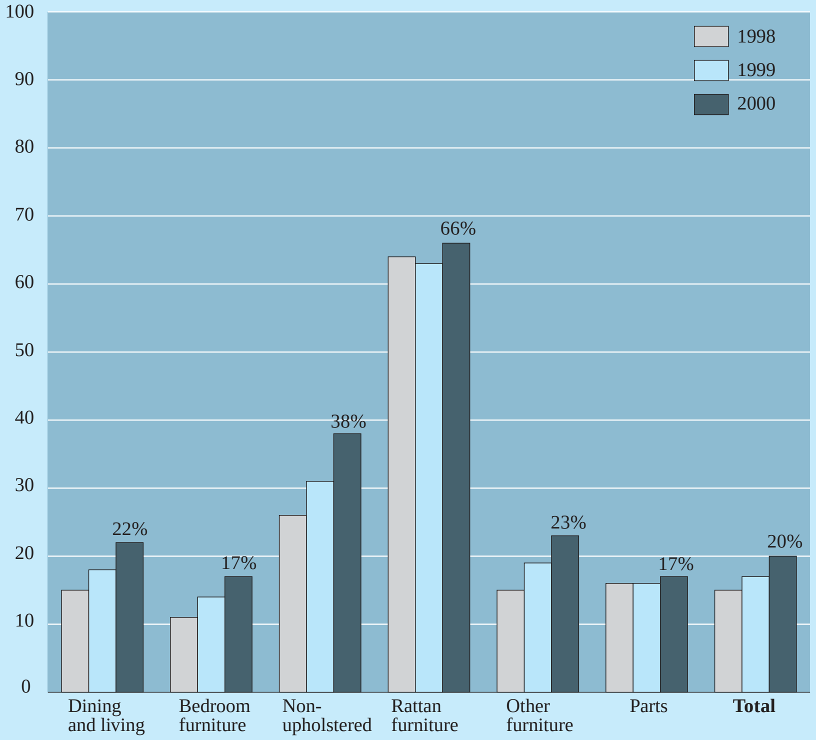
Table 5.8 EU imports from developing countries by product group, 2000

Product group	DC supplies US$ million	Major supplies from developing countries to the EU Percent of total import value
Dining and living room	630	Indonesia (26%), China (19%), Malaysia (13%), Brazil (10%), India (6%), Thailand (5%), Mexico (5%), Slovenia (5%), Vietnam (4%), Slovenia (3%).
Bedroom furniture	284	Brazil (29%), China (24%), Malaysia (23%), South Africa (6%), Slovenia (4%), Indonesia (3%), Philippines (2%), Vietnam (2%), India (1%), Zimbabwe (1%).
Non-upholstered seating	687	China (33%), Indonesia (28%), Vietnam (12%), Malaysia (7%), Thailand (5%), Slovenia (4%), Brazil (2%), Philippines (1%), South Africa (1%), Turkey (1%).
Rattan furniture	306	Indonesia (58%), China (15%), Philippines (11%), Vietnam (7%), Malaysia (4%), Thailand (2%), Myanmar (0.6%), India (0.4%), Brazil (0.3%), Morocco (0.3%).
Other furniture	771	China (34%), Indonesia (22%), Malaysia (7%), Vietnam (7%), Thailand (6%), Brazil (5%), India (4%), South Africa (4%), Slovenia (3%), Philippine (1%).
Parts	988	Slovenia (34%), South Africa (27%), Thailand (10%), Turkey (8%), China (7%), Indonesia (3%), Malaysia (2%), Mexico (2%), India (1%), Vietnam (1%).

Note: DC supplies for Upholstered (US$ 172 million in 2000) and Kitchen furniture (US$ 36 million) are excluded here.

Source: Eurostat (2002)

**Figure 5.11 Share of developing countries in EU furniture imports, 1998 - 2000
As percent of total supply (value in US$) by product group**



Source: Eurostat (2002)

Developing countries, as defined by the OECD, are listed in Appendix 9. The differences and difficulties in expansion of furniture industries in each region can be described as follows:

Asia

Most EU importers buy products from Indonesia, China, Malaysia, Thailand, Vietnam, India and the Philippines. Indonesia is leading supplier of rattan furniture, wooden seats (teak) and dining and living room furniture. Supplies from these countries are large and the furniture industry in both countries is characterised by the presence of many small companies, competing in terms of price, product innovations (Philippines), efficiency and quality (China) and shortening of lead-times. Indonesia, China, Malaysia, Philippines, Thailand and India have well-established furniture associations.

International or national trade fairs in these countries take place as well. Furniture from Thailand and India is not yet widely known, although EU imports have increased, especially of dining and living room furniture from India. Vietnam has increased exports of wooden seats, cupboards and living and dining room furniture and is increasingly recognised as an interesting new supplier of furniture. Other growing Asian suppliers to the EU are Myanmar, Pakistan and Iran.

Latin America

Brazil and Mexico are leading suppliers from Latin America, especially for bedroom, dining and living room furniture. Exports of Latin American countries are more oriented to the USA. Argentina, Chile Bolivia, Guyana and Honduras are sizeable exporters of other wooden furniture and parts to the EU. Small-medium supplying countries to the EU are Costa Rica, Colombia, Peru, Ecuador and Uruguay.

Exports from Argentina more than trebled between 1998 and 2000, catching up after a period of falling exports in the late 1990s, although prices are expected to fall due to further weakening of the peso. Some Latin American countries have furniture associations, but other countries have no or poorly organised wood associations. Coherent policies and a good co-operation between all parties involved in furniture industry are lacking. In addition, technical problems and the higher prices of furniture from Latin American countries may be constraints to further development in exports to the EU.

Africa, Mediterreanean and Middle East

South Africa, Ghana, Zimbabwe and Swaziland are considerable furniture suppliers to the EU, although EU imports declined in most countries in the period under review. Turkey, Tunisia, Morocco and Egypt are sizeable suppliers of parts and (metal) furniture and can benefit from being close to the EU.

Nonetheless, most of the African countries do not have a large production capacity, lack the level of technology or cannot guarantee a constant delivery. The few countries with a furniture industry mainly produce for the home market or for neighbour countries. Most exporters have shifted their attention towards the South African market. Zimbabwe and Ghana have furniture associations but, like in Latin America, the wood associations are poorly organised.

Nevertheless, there are opportunities for exporters from developing countries to increase their supplies to the EU, which could be of finished, semi-finished furniture or *parts*. Starting in the 1990s, developing countries have steadily increased their exports of parts to industrialised countries. Now the product group parts represents the largest category within the DC supplies to the EU (see table 5.8).

The tendency among importers is to look for newer developing countries like Tunisia, Ghana, Morocco, Pakistan, Honduras or other sources in South America or Africa, where production costs are lower. With the increasing specialisation of the fragmented EU market, manufacturers have a growing interest in a co-operation with others.

In addition, manufacturers and large retailers are constantly looking for different types of living or bedroom furniture from new countries with new designs, often contemporary, but still with a link to the culture of the supplying country, which makes it differ from the usual contemporary furniture.

6 EXPORTS

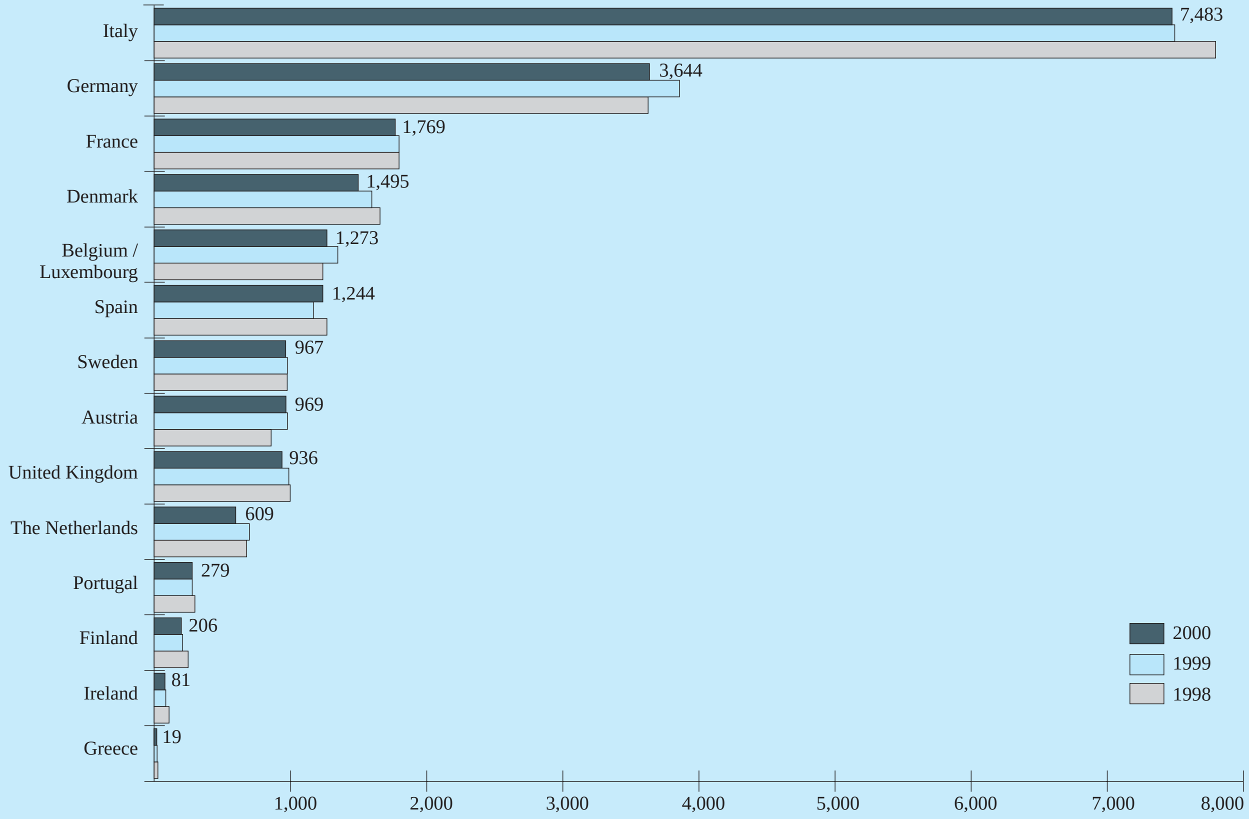
Total exports by the EU
The EU is the leading exporter with Italy, Germany, France and Denmark being among the world's top ten exporting countries. Two third of EU furniture exports goes to other EU markets with sizeable volumes being re-exported from e.g. Belgium, United Kingdom and The Netherlands. Other important destinations are USA, Middle East, Russia and other Eastern European countries. It should be noted here that Germany and Italy export much furniture in parts or in semi-finished form to Eastern European countries for final production.

In 2000, the EU exported around 40% of the total world exports of furniture, or 5,843 thousand tonnes with a value of US$ 20,978 (or € 22,802) million. Between 1998 and 2000, EU exports increased by 16% in volume and decreased by 4% in value, which was mainly due to the strength of the dollar. Being a major producer, Italy is the largest exporter of furniture in the EU and accounted for almost one third of all EU exports in 2000: 1,836 thousand tonnes, with a value of US$ 7,843 million. Italy is followed by Germany (18% of EU exports), France (9%), Denmark (9%) and Belgium (6%).

Although figure 6.1 shows falling export values in most EU countries, rising tendencies were registered in terms of export volume. A detailed overview of EU exports can be found at the end of Appendix 2 (see - *European Union - Exports*). Between 1998 and 2000, especially Italy, Germany, France, Austria and Sweden increased their volumes of exports. Except Portugal, Ireland and Greece, exports of the other EU countries increased as well in the period under review.

Appendix 2 also lists export statistics of the EU by product group. Most furniture exported by the EU in 2000 were: upholstered seating (18% of total EU export value), dining and living room furniture (13%),

Figure 6.1 **EU furniture exports, 1998 - 2000**
US$ million



Source: Eurostat (2002)

bedroom furniture (9%), non-upholstered seating (7%) and kitchen furniture (7%). Other furniture and parts form around 20% each.

In 2000, around 64% of total EU exports went to other EU countries. Major destinations for EU exports within the EU were Germany, which accounted for 17% of EU exports, France (10%), United Kingdom (8%), Netherlands (7%), Belgium (5%), Austria (4%), Spain (3%), Sweden (2%) and Italy (2%). Non-EU destinations were: USA (10%), Switzerland (5%), Russia (2%), Norway (2%) and Japan (1%).

In terms of volume, exports to most other EU countries increased between 1998 and 2000. Though EU exports to destinations outside the EU (Russia, Asian countries) stagnated, which were affected by the recession. Stronger exports to Eastern Europe and the USA compensated declining exports, especially those to Asian countries.

Exports by the selected markets within the EU

Italy

Italy, the largest EU producer, controlled a 36% share of all furniture and exported from the EU, in 2000, a volume of 1,836 thousand tonnes, valued at US$ 7,483 million. The most important product group was upholstered seating, which accounted for 31% of total exports. Other large export products were other furniture (19%), parts (16%), dining and living room furniture (12%), non-upholstered seating (10%), bedroom furniture (7%) and kitchen furniture (5%).

In terms of volume, Italian exports were higher in 2000 than 1998 due to more exports of upholstered seating, dining and living room furniture and non-upholstered seating. In 2000, other EU markets imported 59% of Italian furniture, while the USA, Russia, Switzerland, Japan, Israel, Saudi Arabia, Turkey, Australia, Hong Kong and other Asian markets were also major customers.

Germany

Germany is the second largest exporter of furniture in the EU and exported furniture valued at US$ 3,644 million in 2000, which represented 18% of total EU exports. Between 1998 and 2000, German exports increased by 16% in volume terms. Parts accounted for 31% of the furniture exported by Germany, followed by kitchen furniture (20%), other furniture (16%), upholstered seating (12%), bedroom furniture (9%), dining and living room furniture (8%) and non-upholstered seating (4%).

Other EU markets imported 67% of German exports, while 33% went to non-EU markets, of which Switzerland, Russia, other Eastern European countries, USA and Japan were significant customers in 2000.

France

France is the third largest exporter of furniture, exporting a value of US$ 1,769 million, or 8% of total EU exports in 2000. Exports by France increased by 18% in volume terms in the period under review, from 408 to 482 thousand tonnes in 2000. Parts accounted for 24% of this total, followed by other furniture (23%), dining and living room furniture (15%), upholstered seating (11%), bedroom furniture (9%), non-upholstered seating (11%) and kitchen furniture (7%).

In 2000, around 66% of France’s total exports went to other EU countries, while Switzerland, USA, Russia, Japan and Saudi Arabia were the major non-EU destinations.

Spain

Spain is a sizeable EU exporter of furniture and exported furniture with a value of US$ 1,244 million in 2000, or 6% of total EU exports. Between 1998 and 2000, Spanish exports increased by 9% (from 334 to 365 thousand tonnes), which was due mainly to increased exports of bedroom furniture and kitchen furniture. Other furniture accounted for around 23% of total Spanish exports, followed by parts (17%), dining and living room furniture (16%), upholstered seating (12%) and bedroom furniture (12%).

In 2000, other EU markets imported 68% with France being still the main market (25% of Spanish exports), followed by Portugal and Germany. Exports to non-EU destinations declined because of a continued weak demand in Asian markets and a slump in the Russian market.

United Kingdom

In 2000, the United Kingdom exported 272 thousand tonnes of furniture with a total value of US$ 936 million, or 5% of total EU exports. Between 1998 and 2000, UK exports increased by 32% in volume terms, while the value declined by 7%, which partly can be attributed to the strength of the Pound Sterling, which makes exports relatively expensive for other countries.

Of total UK exports (by value), other furniture accounted for 39%, followed by parts (21%), dining and living room furniture (14%), upholstered seating (11%) and kitchen furniture (6%). In 2000, around 58% of exports went to other EU countries, with an estimated 15% being re-exported. The remaining 42% of British furniture mainly went to USA, Japan, Saudi Arabia, Canada, Australia and Asian countries.

The Netherlands

The Netherlands exported a total volume of 175 thousand tonnes of furniture valued at US$ 609 million in 2000. The Dutch furniture sector comprises many small manufacturers with many of them having clients abroad, mainly in Germany, Belgium, United Kingdom and France.

Between 1998 and 2000, Dutch exports decreased by 8% in value, due to less exports of non-upholstered seating and other furniture. In 2000, other furniture accounted for 27% of total Dutch exports, followed by dining and living room furniture (20%), non-upholstered seating (15%), upholstered seating (14%) and parts (11%). The greater part of these exports (84%) went to other EU markets, whereas new export markets such as Eastern Europe and the Middle East are gradually gaining in importance.

An overview of total EU exports and EU exports by product group is given at the end of Appendix 2.

7 TRADE STRUCTURE

7.1 EU trade channels

As a product, furniture is not suited to multiple handling and the principal flow of domestic furniture is therefore from manufacturer to importers or direct to the retailer's warehouse or stores. Up to now, few manufacturers operate their own distribution networks or sell directly to consumers. However, some manufacturers increasingly sell direct to consumer by their *single brand stores*, especially in Italy (e.g. Capellini) or Germany (e.g. Leolux) and by *factory outlets* (see section 7.2 - Vertical integration).

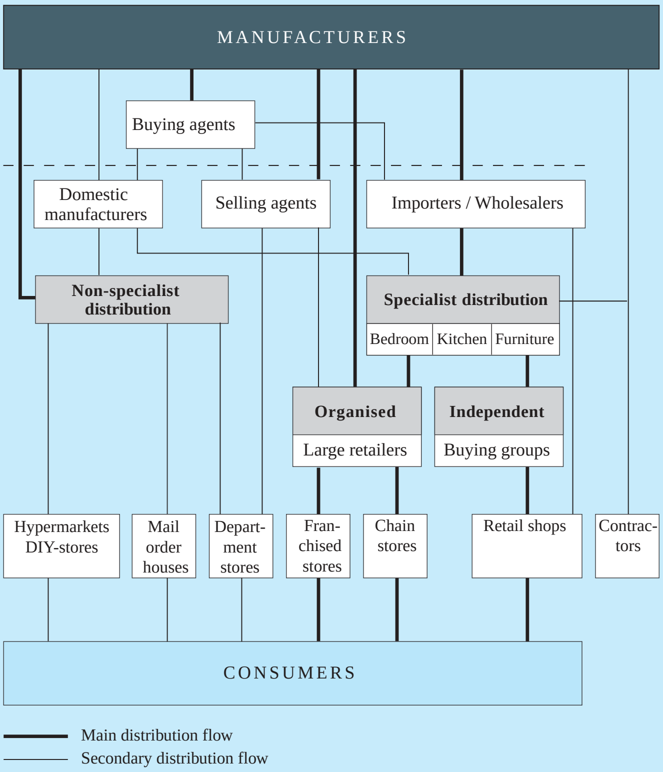
Another tendency in furniture distribution is the international expansion of franchised stores operated by manufacturers, such as the Divani & Divani store operation by Natuzzi with most stores in Italy but new stores opened up in France and Germany.

Although most furniture is still supplied from manufacturers through importers/wholesalers or direct to consumers by the large retailers, as is shown in figure 7.1. In southern EU markets, where distribution networks are highly fragmented and complex, agents play an important role. In general, EU furniture distribution can be broadly divided as follows:

- ***Specialist distribution,*** where all retailers specialise in domestic furniture or in sub-sectors such as bedroom furniture or kitchen furniture. In 2000, the share of retail sales accounted for by specialist retailers in the selected EU markets averaged 78%. Specialists can be *organised or independent. Organised* retailers are the large chain stores (stores with the same name under central management), and franchised stores. Buying groups (or co-operatives) are important in Germany and The Netherlands and are organisations of smaller shops, which joined forces through large scale purchasing and joint promotion campaigns (see section 7.2). *Independent* retail shops are important in southern EU countries and most of them are not organised.

- ***Non-specialist distribution,*** which includes all those who operate in (RTA) furniture and in other products, such as department stores, mail order houses, hypermarkets, DIY (Do-it-yourself) stores and other stores or garden centres. In 2000, retail sales by non-specialist retailers averaged around 22% of furniture retail sales in the selected EU markets (see differences by country in table 7.1).

Figure 7.1 Typical distribution structure for furniture in the EU



Furniture retailing

Retailing varies by product (e.g. upholstered, bedroom, home office or RTA furniture) and by country. Chain stores with large showrooms are prevalent in middle and northern EU countries, while independent shops with small showrooms are typical in Italy and Spain.

In 2000, there were around 80,000 furniture retail companies in the selected EU countries, employing 400,000 people. There is a large variety in outlets, ranging from those stocking a particular style of furniture to those carrying an enormous range of products with related accessories, which makes the distribution system highly complex.

Apart from the Swedish chain store IKEA, still opening up stores throughout the EU, distribution is concentrated at national level. Although other large-scale retailers such as MFI or Conforama now increase their presence in Italy and Spain.

In Germany, France, United Kingdom and The Netherlands, furniture sales networks are modern, well-structured and have high levels of efficiency. In out-of-town shopping centres large *interior shopping malls* are located, with sizes of at least 25,000 m^2. A shopping mall houses a mix of smaller and medium sized, specialised in furniture, lightening or household goods. Most of these stores are linked to a buying group or chain store operation.

Recently interior shopping malls in most countries suffered from a slump in the housing market, waning consumer confidence and increased price competition especially from (furniture) discounters and non-specialists.

In 2000, furniture sold through chain stores has slightly grown to an average of around 21% of furniture retail sales of the selected EU markets. Although smaller shops, whether or not linked to a buying group, remain important, still forming around half of sales. Especially in Italy, Spain, but also in Germany and The Netherlands, consumer stay loyal towards smaller shops, since they still offer the old-fashioned service that inspires confidence. This especially concerns consumers who regard price to be less important.

The differences in furniture retailing between the selected EU markets are shown in table 7.1.

Germany

In 2000, there were 13,100 furniture retailers in Germany. Smaller inner city shops continue to lose market share to big furniture centres, which are typically located on town peripheries and which can have a selling area of more than 35,000 m^2 with huge, attractive presentations. Recently, the size of furniture showrooms has increased by 20% and their floor area reached a total of 22 million m^2 countrywide.

Table 7.1 Furniture retailers in the selected markets within the EU
As percent of retail sales in 2000

	Germany	France	United Kingdom	Italy	Spain	Netherlands
Total no. of companies	**13,100**	**12,500**	**11,900**	**21,300**	**13,900**	**7,200**
Specialists	**84%**	**81%**	**63%**	**78%**	**80%**	**83%**
Buying groups	51%	10%	27%	6%	9%	53%
Independent shops	12%	8%	7%	53%	51%	6%
Franchised stores	5%	30%	4%	5%	6%	4%
Chain stores	16%	33%	35%	14%	14%	20%
Non-specialists	**16%**	**19%**	**37%**	**22%**	**20%**	**17%**
Department stores	1%	2%	16%	1%	8%	2%
Hypermarkets / Discounters	2%	2%	3%	2%	4%	
DIY Stores	4%	4%	5%	2%	3%	8%
Mail order companies	5%	5%	8%	2%	1%	3%
Direct sales (factories)	3%	4%	3%	14%	4%	2%
Other	1%	2%	2%	1%	2%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: UEA, EHI, IPEA, Keynote, CSIL, HBD (2002)

Large chain stores have become popular and the furniture retail sector has become more concentrated.

Most of the large retailers are connected to the 15 *buying groups*, of which Begros (150 outlets), Atlas (100 outlets), Union (167 outlets), VME, Garant, DMV and Europa Möbel are the largest. German buying groups were responsible for 51% of German furniture retail sales in 2000. Chain stores are also well represented in Germany with leading chain stores such as IKEA (25 outlets), Porta Möbel (18 outlets), Möbel Walter (30 outlets), Roller Discount (68 outlets) and Segmüller (10 outlets).

The shift towards larger retail outlets has meant that retailers are stocking a much wider product range in order to develop a clear, distinctive image. It has also led to the arrangement of products by theme or style, such as "Neues Wohnen" (modern living) or "Ländlich-Mediterreanean" (country style with southern EU influences), rather than old-fashioned departments for beds and upholstered furniture. At the other end of the market, price competition has intensified with the growth of furniture discounters (e.g. Roller Discount and Poco Einrichtungsmarkt) and factory outlets (Bierstorfer).

Non-specialists in Germany accounted for 16% of German retail sales (see table 7.1) in 2000. DIY stores and hypermarkets are increasing market share, especially in lower priced (RTA) furniture, and they together accounted for 6% of the market.
The large German mail order houses such as Quelle (operated by Karstadt) or Otto Versand offer more variety in furniture, although they have suffered from the growing on-line operations by furniture chain stores. Direct sales by manufacturers accounted for about 3% of the market.

France

In France, furniture was sold by 12,500 retailers with a total selling space of 9 million m^2 in 2000.
Furniture specialists account for 81% of furniture sales, of which 30% are made by "multi-spécialist" franchising companies such as But (owned by Kingfisher), Conforama (owned by PPR i.e. Pineault-Printemps-Redoute) and Cuir Center. Most of these stores are large (sized 1,500 m^2 or more) and sell furniture in combination with consumer electronics and household appliances.

There is a move among French people towards shopping in chain stores such as IKEA, Maxiam or L'Ameublier, the majority of whom are people over 25 years old.
In 2000, chain stores accounted for one third of French furniture sales. Trendy chains e.g. Fly, Docks du Meuble or Habitat, which are targeting younger consumers ("*Jeune Habitat*") remain popular.

France also has a number of buying groups (co-operatives), which only accounted for 10% of retail sales, with Monsieur Meuble, Atlas and Mobiclub being the main specialists groups. Compared to other selected EU countries, the share of buying groups is low in France. As in Germany, small independent shops in town centres have slowly lost market share to larger outlets on the outskirts of towns and cities.

Within the non-specialist retailers, DIY stores have gained ground, although few female consumers visit these stores. In France, women are the main purchasers of furniture. In 2000, mail order sales accounted for 5% of the furniture market, with the companies La Redoute, Trois Suisses and Camif being the dominant suppliers. Camif operates their own high street furniture format, called Les Maisonnables with 3 outlets in Paris, Lyon and Lille. Due to growing on-line sales by the franchised and chain stores, mail order lost market share in the past few years.

United Kingdom

In 2000, the United Kingdom had 11,900 retailers with furniture specialists holding a lower share (64% of furniture sales - see table 7.1) as the other selected EU countries. The role of independent shops in UK furniture retailing became less, because of fierce competition from big multiple (or chain) stores and non-specialists such as department stores, hypermarkets, discounters and DIY stores.

Leading furniture multiples were MFI, IKEA, DFS, Harveys, Magnet, Courts, Limelight, Furniture Village, Habitat and Furnitureland, often located at the out-of-town shopping centres. The leading furniture multiple, MFI was the first in offering RTA furniture to young and price conscious consumers. By the end of the 1990s they lost market share to IKEA, which offered more choice and a higher quality of RTA furniture. In 2001, MFI formed a joint venture with the US furniture manufacturer/retailer Ethan Allan. There is still an ongoing tendency towards mergers and acquisitions between the large companies in order to face the growing competition from non-specialists in UK furniture retailing.

Non-specialised outlets accounted for 37% of UK retail furniture sales in 2000, which is significant. Department stores (e.g. John Lewis, Debenhams and Allders) are more important than in most other EU markets, with a share 16% of total sales. Argos is one of the leaders in the field of bedroom furniture being competitive by offering short delivery times. In addition, department stores, more associated with clothing, such as Marks and Spencer, started to offer a limited range of furniture. Also clothing chains e.g. Laura Ashley and Next increasingly sell branded or own labelled 'lifestyle furniture' combined with fashionable houseware and furniture accessories, most of which is on offer on-line as well. Furniture sales by DIY stores (e.g. B&Q, Homebase, Wickes) and mail order companies remains high, especially in the low-end and RTA markets. Recently DIY stores offer installation services for furniture, which have been successful so far, especially for “busy people”.

Italy

The EU country with the most furniture retailers was Italy, which had more than 21,300 outlets with a total selling area of 8 million m^2, or 362 m^2 per outlet. In 2000, independent shops still held a market share of about 53%. Most furniture is made to order, which allows consumers to choose exactly what they want, colour and texture wise. Although recently more independent shops are forced to join buying groups or franchise organisations in order to comply with the growing power of the large furniture chains.

Divani & Divani is a leading chain, especially for upholstered furniture, which is franchised by Natuzzi. Other important Italian specialist chains include Mercato Uno (68 outlets), Mercatone Zeta (Metro), Semeraro (48 outlets), Emezeta (owned by the French PPR), Bergamin, Eurocasa, Aiazzone and Casa Italia with most of these stores also handling lightening.

Recently, bigger concentrations and the influence of foreign multiples, such as IKEA, Conforma group and Europa Möbel, change the structure of the trade and the consumer attitude. Up to now, Italian people had a slight aversion at walking out of the stores with an (RTA) product, which they regarded as “cheap style”. But nowadays there is a growing interest in contemporary style furniture and IKEA opened up 18 stores in whole country with success so far.
On the other hand, the more fashionable and expensive chain Habitat was forced to close down all its 10 stores in Italy in 1999, due to a lack of interest by Italian consumers.

In 2000, there were about 810 furniture chain stores, which together controlled about 14% of the Italian furniture market. The remaining 22% of furniture sales are carried by non-specialists (e.g. hypermarkets, DIY stores and mail order houses etc.) and mainly direct sales from factories.

Spain

Retail distribution of furniture in Spain is dominated by small independent shops, which are supplied directly by local manufacturers. In 2000, there were an estimated 13,900 retailers, 80% of which were smaller than 250 m^2. There is little specialisation by furniture style and many stores offer a wide variety of items.

On the other hand, the number of furniture chains and franchised stores is increasing, which is at the expense of smaller independent shops. For example, IKEA opened up its first store in Spain in 1996 and now achieved a leading position in Spain with only 7 stores, but each of these stores has a floorspace of over 22,000 m^2. This is four times the size of other leading large Spanish furniture chain store, such as Merkamueble (28 outlets) or Galerias Tarragona (65 outlets). Other sizeable chains are the French owned e.g. Conforama (13 outlets), Fly, Roche Bobois or Spanish chains e.g. Moblerone (franchised by the Alicante group), Espejo Hermanos and Artimueble (discount).

In 2000, 51% of Spanish furniture sales were achieved by independent shops and 9% by the buying groups, of which Acem and Intermovil were the largest.

With regards to non-specialists, hypermarkets and department stores together represent 12% of sales, with El Corte Inglés alone accounting for 4%.
The number of (French) DIY stores increases in Spain, all of which offer a wide range of RTA furniture.
As is shown in table 7.1, the share of DIY stores was around 3% in 2000. Direct sales by furniture factories remains important and took a further 6%.
The Spanish furniture trade tends to be more splintered, compared to other EU markets with wholesalers operating more on a regional than on a national basis.

The Netherlands

Similar to most other selected EU countries, specialised outlets dominate furniture retailing in The Netherlands and accounted for 83% of the total market.

In 2000 there were around 7,200 furniture specialists and about 2,000 stores selling a combination of furniture and furnishings. Most stores are small (400 - 1,000 m^2) with the majority being linked to an organisation. As in Germany, retailers who are connected to a buying group accounted for more than half of Dutch retail sales. The two main buying groups are: Euretco (388 outlets), Intres (362 outlets) and Macintosch (214 outlets, among which furnishing chains: Kwantum, Piet Klerkx and Stoutenbeek).

The trend for retailers to merge into larger groups is continuing, with more big foreign retail chains, selling on large floor space in interior shopping malls (e.g. *Alexandrium* in Rotterdam or *Villa Arena* in Amsterdam). Although, the popularity of interior shopping malls (known in The Netherlands as “woonboulevards”) declined. According to the CBW (Dutch Central Bureau for Living), shopping malls attracted many recreational consumers, looking for the latest ideas and trends in furniture.

But they still made their final purchase at the specialised shop in their neighbourhood with skilled sales staff, who can offer more service.
Kitchen and bedroom specialists are mostly affiliated or organised in a buying group as well. After a period of growth in the late 1990s, they have suffered from falling sales recently, due to a waning consumer confidence and a slump in the Dutch housing market, which is likely to affect other specialists as well.

In 2000, chain stores accounted for 20% of furniture sales. Major chains operating in The Netherlands were IKEA (8 outlets), Nijman (36 outlets), Sanders Meubelstad (12 outlets), Lucky Leder (13 outlets), Jencikova (11 outlets), Beter bed (90 outlets), Mijnders Meubelen (18 outlets) and furniture-furnishing chains at the cheaper end of the market such as Leen Bakker (91 outlets). Franchise operations include Lundia (25 outlets), Montèl (13 outlets) and Royal Sleeptrend (30 outlets).

In order to grow further, all furniture specialists increasingly concentrate on stocking one type or concept of furniture for a particular consumer group e.g. special furniture for children, for older people, design furniture for trendy people or colonial/ethnic furniture for adventurous people.

Internationalisation in EU furniture retailing

Within the EU, internationalisation of furniture distribution continues, encouraged by progressive integration at European level. Spain and Italy are principal target for the internationalisation of furniture retailers such as IKEA and Conforama, because both countries are more open to foreign operators and there is market potential.

In the EU, the top 50 furniture retailers controls 42% of the total market. The ten largest retailers within the EU are shown in table 7.2. It is likely that EU furniture distribution in the future will be organised either according to the German model of buying groups or to the French model of franchising chains. Both models can be adapted well to local situations.

E-commerce

The Internet and the possibilities opened up for on-line shopping also exist in the furniture sector.
The number of furniture Internet sites by chain stores and department stores is still growing. According to a survey by Csil in May 2000, in the five next years the Internet is expected to play a mainly informative role in the furniture industry.

The business-to business commerce (referred to as “B2B”) is likely to be stimulated by the Internet. However, in the business-to-consumer (“B2C”) commerce it only will play an incidental role, as most consumers use the web to inform themselves extensively on furniture models, styles, designs, colours, prices, qualities, second hand items, services, warrantees and delivery time.

When purchasing, consumers still like to be able to touch, feel and try out furniture items before they buy and continue to buy in a shop. Better informed consumers are likely to know exactly what they want and may become more critical, which will have a large influence on the sales of furniture. For example, retail outlets will require more skilled staff, who are able to assist well-informed consumers who “designed” their own home interior.

Table 7.2 Top 10 largest retailers in the EU, 2000

Retailer	Countries of operation	EU sales million US$	No. of outlets	Area (1,000 m^2)
IKEA	Europe, USA, Asia	7,370	132	48,000
Conforama	France, Italy, Spain, UK	2,778	268	1,270
But	France, Italy, Spain, UK	1,689	326	855
MFI	UK, France, Spain	1,582	386	491
Möma-Lutz	Austria, Germany	1,401	71	na
Porta	Germany	952	85	430
Möbel Walther	Germany, Czech Rep., Poland	803	30	220
Höffner	Germany	839	16	122
Mobilier Europeen	France, Netherlands, Switzerland	766	282	398
Roller GmbH	Germany	715	68	na

Source: Gruner+Jahr, Möbelmarkt, Mintel (2002)

Other hurdles for furniture e-tailers to overcome are:

- To deliver the item in time in an efficient way and at low costs.
- To establish a safe and 'hacker-proof' payment system by credit card.

The American e-commerce company *furniture.com* has an on-line choice of 50,000 furniture items.
In the year 2003, it is estimated that Germany will have 30 million Internet users, while France should have 18 million users, Italy 10 million and Spain 8 million. Forecasts for 2003 of online home furniture sales are around 2% of the total US furniture market and 0.5% of the EU market. These figures do not include the mail order business, which gradually shifts into e-commerce.

7.2 Distribution channels for developing country exporters

For exporters in developing countries, the physical distribution of furniture is a problem. Therefore, it is recommended to have a warehouse in an EU country. The following channels provide the safest and most effective method of distribution:

- **Importers**

By buying at his own account the importer takes title to the goods and is responsible for their further sale and distribution in his country and/or in other EU markets. He is familiar with local markets and can supply considerable information and guidance to the overseas manufacturer in addition to the primary business of buying and selling, such as the administration of import and export procedures and holding of stock.
The development of a successful working relationship between manufacturer and importer can lead to a high level of co-operation with regard to appropriate designs for the market, new trends, use of materials and quality requirements.

- **Domestic manufacturers**

Confronted with rapidly rising production costs, which have rendered many manufacturers uncompetitive, (especially in labour-intensive production lines) manufacturers are increasingly assuming the role of importers. Like the importers they look for low-cost sources, which produce furniture on a made-to-order basis, instead of purchasing ready-made articles.
The main advantage is that these items can be made according to their own design, quality and colour specification.

- **Buying agents**

These are independent companies which negotiate and settle business on the instructions of their principals and which act as intermediaries between buyer and seller. They do not buy or sell on their own account and work on a commission basis. Most agents represent more than one manufacturer, although competition is avoided. Often the buying agent has his office in the supplying country.

- **Selling agents**

These are also independent companies, but they work on a contract basis for one or more manufacturers. They often sell from stock in order to meet their clients' short-term demand. They also work on commission basis. Stock is often formed on a consignment basis.
If the selling agent builds up his own stock, he is in fact functioning as an importer/wholesaler.

- **Department stores, chain stores and discounters**

Department stores, large furniture chains and discount outlets also buy furniture directly from foreign suppliers. This may involve intermediary activity by a selling agent on behalf of the manufacturer or a buying agent on behalf of the (multiple) retailer. This method of doing business has become more popular since it cuts out several intermediaries, thus reducing costs and enabling the retailer to offer the product at a lower end price. It is particularly significant when a fashion trend, such as the current huge popularity of rattan furniture, takes hold and there is fierce competition between retailers to offer lower and lower prices. Unfortunately, this method often results in the supply of huge volumes of poorer quality, cheaper merchandise, after which the demand peaks and then falls off.

Large chains such as IKEA have their own purchasing staff, buying from all over the world. In the country of origin, most buyers prefer the lines between manufacturer and the source of raw material (e.g. rattan farmers) to be as short as possible. In this case there is a better control over production and communication lines are short, which reduces the risk of discrepancies between buyers' requirements and final product.

- **Buying groups / Co-operatives**

Central buying groups or co-operatives prefer to minimise the cost of middlemen by purchasing directly from a supplier whenever possible. This channel is used particularly for large-scale requirements, where direct dealing with well-known suppliers is essential. These groups act as purchasing agents for their individual members (smaller retail shops) and act as financial intermediaries between producers and retailers. Sometimes they offer warehouse facilities to their members. Other advantages for members include credit card rates, provision of marketing intelligence, staff training and advice on legal and business issues.

The objective of the buying group is to make it possible for their members to compete with chain stores, which have the buying power necessary to get larger discounts from suppliers. Buying groups are tending to purchase from fewer suppliers, with whom they aim to intensify their relationship and together promote increased sales in the market. This new trend is called "partner shipping" and originated in the USA.

Some recent issues in furniture retailing, which are of relevance to exporters are:

- **Vertical integration by manufacturers**

In this case manufacturers sell direct to consumers by their own stores, which removes the need for retailers. An example is, the ***single brand or flagship store*** (e.g. Leolux 'design centres', Ligne Roset, Sofa Workshop Direct, Classic Choise), which sells the complete furniture range of one brand and is meant to create/improve the brand image. Most stores have a design corner for tailor made furniture, based on consumers' needs, which nowadays are more specific.

Another example of vertical integration is the ***factory outlet***, where manufacturers sell out of date furniture to consumers at low prices. A factory outlet centre mainly sells clothing and other fast moving consumer durables. In 2000, there were 33 factory outlet centres in the UK, which is more developed in this respect than other EU countries (e.g. 14 centres in France; 9 in Germany; 7 in Spain; 6 in Italy and 1 in The Netherlands).

- **Store attractiveness and regular change by retailers**

With the growing influence of fashion in furniture, furniture stores change their range more often (than 2-3 times/year), which gives the store an ongoing innovative image. New furniture ranges can be combined with all sorts of accessories, creating a total interior concept. For exporters it is important to know this concept and he should try to make a link here when introducing his products, even at importer level. Nowadays, shop interiors appeal more to consumer target groups and can range from classic, colonial to contemporary to ultra-modern. In shop interiors, products are clearly and well laid out with some stores offering a relax/lounge area and some inter-activity (e.g. computer aided design corners).

Distribution channels for particular product groups

Mass market and middle market furniture is mostly sold in unassembled or knock-down (KD) form. This is because of the high freight costs involved in transporting assembled furniture and because the major retail outlets can maximise retail space and turnover, thus ensuring high volume sales. Furniture imported in this way is either be re-assembled by the importer for sale in retail outlets as an assembled product or sold in flat-packs for assembly by the consumer.

Rattan furniture is usually handled by specialised importers of furniture, or is imported direct by retailers or central buying groups. The main retail outlets for rattan seats and furniture are all furniture specialist stores including rattan furniture specialists. It can also be found in garden centres, department stores and at mail order companies.

Office furniture manufacturers often sell their products directly, either through franchises or through their own agents. Roughly 40% of this segment is controlled by manufacturers.

It is important to note that, by selecting one trade channel, other channels are often automatically excluded. One cannot have a relationship with a department or multiple chain store while at the same time entering the market with the same line of products through an importer/wholesaler. This is often unacceptable to trade partners and will definitely have an adverse effect on export operations. For the serious developing country exporter, the recommended approach is to aim at building up a long-term business relationship.

Promotion

Importers, agents, retailers and other buyers travel extensively to international trade fairs to view new products, to decide upon suitable ranges for their market and to keep up with the latest changes in interior design, furniture fashions, materials and colours. The Salone Internazionale del Mobile in Milan (Italy) and the International Furniture Fair in Cologne (Germany) are the most important furniture fairs in the EU.

The Salone Internazionale (Milan) is the leading fair in terms of trends, with around 173,000 visitors and 2,000 exhibitors. The International Furniture Fair (Imm - Cologne), with around 120,000 visitors and 1,500 exhibitors is the leading fair in terms of size.

Other large fairs are the Salon du Meuble in Paris (France) and the Salon Internacional del Meuble in Valencia (Spain). A list of the most important European furniture trade fairs can be found in the EU Strategic Marketing Guide "Domestic Furniture" (2000) section 1.6. The addresses of all the trade fair organisers can be found in this survey in Appendix 6.

Traditionally the major trade fair for furniture in The Netherlands has been the International Furniture Fair, held annually in September in Utrecht. Like in other EU markets, in The Netherlands a permanent exhibition centre, the Home Trade Center (HTC), located at Nieuwegein in the centre of The Netherlands, has become the main promotional platform for the domestic furniture trade. Many manufacturers, importers and sales offices and agents for foreign suppliers have showrooms in the centre.

8 PRICES AND MARGINS

8.1 Prices and margins

Prices
Price is important in the furniture sector, but there is such a broad range of items - qualities - materials - raw materials and styles that it is almost impossible to give typical prices. Some rough price indications of dining and living room, bedroom, occasional and rattan furniture are given in the EU Strategic Marketing Guide (2000), section 2.1 “Product profiles”.

Compared to the USA, consumer prices of furniture in EU countries are low. Price competition in the low- to middle-levels of the EU furniture market has become very fierce recently.

The average retail prices for many low-to middle level furniture items have fallen because of:

→ More availability of cheap imported (RTA) furniture, made of hardwood (e.g. teak).
→ Large retailers, who benefit from larger economies of scale and increased efficiency, are in position to exert much pressure on prices and margins in furniture trade channels.
→ A high degree of specialisation, which has resulted in a wide range of furniture items.
→ More available items, coupled with an ongoing change in interior fashion, which made consumers less prepared to pay high prices, as the lifespan of a furniture item has become shorter.
→ After the economic recession from 2000 onwards, consumers have been more demanding and often expect a discount. For loyal Italian or Spanish consumer, a “special price” was already a typical practice. But in France, Germany (especially in the former East) and The United Kingdom, price-based promotions by furniture retailers made consumers try to barter in the shop, to get prices down.

So it is vital that new products from exporters of developing countries offer extra value. A new product can be of interest to a buyer either because it is a special product or novelty, or because it could appeal to a particular consumer target group. In this case, the price is of secondary importance.

The following other circumstances may also play an important role in price decisions for exporters:
- the exclusiveness of the product;
- the existence/availability of competitive products;
- the volume of business;
- the degree of risk (innovative design or fashion trend product, new or known source);
- the marketing services offered by different links in the sales chain;

New pricing and the Euro (€)

Despite the many fears, retailers in the selected EU countries smoothly changed over to the Euro in January 2002. Most people had mixed feelings to say farewell to their national currency and had doubts, if the Euro could maintain its position against the US Dollar.

With regards to the new pricing of articles, consumers were suspicious. Many retailers took the change over as an opportunity to include an annual price increase, as well as their extra operational costs (e.g. dual pricing in 2001, new cash registers, electronic pay machines) into new prices. New psychological price points were determinated and new Euro prices were often rounded up to a nice figure.

In the coming years, the introduction of the Euro will show the discrepancies in pricing between various EU countries which undoubtfully will result in more competition in all product categories, with southern countries lower in price.

The Euro will create more transparency and make it easier for retailers to source products from EU countries at the lowest possible price and without conversion costs. Differences in VAT, however, are still large, ranging from 16% in Germany to over 22% in Scandinavian countries.

Also for furniture, there are still in divergences in prices within EU countries. According to the UEA, the difference in consumer price in 2002 between the cheapest country (Greece) and the most expensive country (Sweden) was still around 40%..

Margins
In the price-competitive market, margin maintenance is vital along with cost controls. Especially for retailers it is important not to erode the margin when making price-based promotions. Successful retailers will have the right balance between cost control, good retail margins and good buying.

Margins at retail level
The typical mark-up for retailers now averages around 80 to 90%. This includes value-added tax (VAT), which ranges from 16 to 21% on furniture, varying within the five selected EU markets.

Calculation of final consumer price	**Low**	**Medium**	**High**
CIF (The Netherlands)	100	100	100
Import duties, handling charges, transport, insurance and banking services	6	6	6
	106	*106*	*106*
Importer's mark-up (20 - 30 -35%)	21	32	37
	127	*138*	*143*
Retailer's mark-up including VAT 19% (80 -100 -120%)	102	138	172
Final consumer price	*229*	*276*	*315*
Ratio CIF- Consumer price	***2.3***	***2.8***	***3.2***

Actual margins can vary widely around these averages depending on the exclusivity of the product, the level of demand and the type of store through which items are sold.
For example, chain stores at the high street are often at expensive locations, carry a wide assortment and have many sales staff, which is than also reflected in higher margin. On the other hand, margins of large retailers such as IKEA or Conforama are lower, as they often buy direct from manufacturers and are mostly located at the out-of-town centres.

Another example is the retail mark up on RTA furniture, which is lower (around 70 to 80%), while mark ups on the more luxury and fashionable furniture items tends to be higher.

Margins at importer/wholesale level
In a similar way importer/wholesaler mark-ups, which used to average 30 to 35% are now more typically less than 30%. Depending on the circumstances mentioned before, there is also a wide variation around these averages. In principle, importers maintain a fairly close control over recommended retail prices, but an oversupply of cheap imported items and the growing success of discounters have seriously disturbed the situation. Mark ups as low as 15% and as high as 60% have been recorded.

The typical average commission rate for an agent is 10 to 15% of sales.

The table above indicates the effect of low, medium and high margins on the final consumer price, based on one CIF price for three different products:

8.2 Sources of price information

The best way to obtain information about prices and price levels in The Netherlands or EU is by visiting one of the major trade fairs. Alternatively, comparisons can be found in the prices given in catalogues from mail order houses, large department stores or from internet sites of companies.

Window-shopping in the prospective market place, at several retail shops, is another good way of getting information about prices, fashions, colours, qualities and promotions. Published sources of information on furniture are listed below. The addresses can be found in Appendix 4.

UEA – European Furniture Manufacturers Federation	→	Web site which gives information on trade and prices in the EU furniture industry: www.ueanet.com
CSIL – Industrial Furniture Study Centre	→	Web site which gives information on trade and prices in the EU furniture industry: www.worldfurnitureonline.com
ITC – International Trade Centre	→	Trade Promotion Organisation, which has made a market survey on rattan furniture with information on prices and margins. Web site: www.intracen.org
IKEA store on-line	→	Web site which gives information on retail prices of IKEA furniture items www.ikea.com

9 OPPORTUNITIES FOR EXPORTERS

This Chapter gives some opportunities for exporters from developing countries and are meant to serve as a basis for the EU Strategic Marketing Guide “Domestic furniture” (2000). As the EU furniture market declined since 2001, exporters should seek opportunities in growing niches, in which they are strong:

Growing product - market niches:

- ***Ethnic furniture,*** which refers to all kinds of (‘exotic’) furniture from developing countries, in styles ranging from classic, contemporary or rustic, which recently regained popularity. In terms of function, individual items include: non-upholstered seating, table sets, cupboards, hassocks, stools, free-standing kitchen items and occasional furniture. It is important that furniture conveys its authenticity in order to stay special or ‘unique’, by special materials, designs, skills in craftsmanship or in finish.

- ***Colonial furniture,*** which mainly concerns furniture, made of teak or other darker types of wood such as wengé, mahogany or cherry. Now luxury items became more popular, for example, seating made of polished cherry wood and upholstered with leather or abundantly decorated small tables.

- ***Rattan furniture*** now has its own established position in home interiors and chairs are frequently combined with wooden tables in contemporary or modern rustic style furniture. In recent years, a niche market has developed for furniture made of fine wickerwork rattan mixed with metal. Also, wicker or bamboo baskets or cane mats remain popular accessories for bedrooms or bathrooms.

- ***Home office furniture,*** which is mostly manufactured from laminated particle board, being low priced and often RTA. Items should be practical, multi-functional and up-to-date (e.g. design, colour material) and should comply with the quality and ergonomical regulations of the country concerned.

- ***Children’s furniture,*** especially multi-functional and modular items, which can be added to over time as the child grows. In this segment, safety standards are important and exporters must pay extra attention to rounded corners, non-cascading drawers, steel bolts in bunk beds and bolted bed rails.

- ***Solid woods:*** In low to medium priced contemporary furniture, solid woods are becoming more popular, instead of the usual veneers and laminates. Importers are looking for new sorts of solid wood, similar to light oak, cherry or darker woods. An alternative to the expensive woods from Scandinavia, Canada or USA, could be rubberwood, which also can meet the strict environmental legislation in the EU.

- ***Special natural materials*** could be rose oak, eucalyptus, palm fibre, bark, midribs, rice husk (for particle board), nut shells, parts of banana trees (trunk’s peel), seagrass, water hyacinth, canvas, cork or abacca leave. Other special materials include wrought iron or aluminium. In addition, combinations of these materials can be made with, stone, shelves, hemp, zinc, jute, latticework or leather.

- ***RTA:*** The quality and diversity in design of RTA furniture is increasing. These products are easy and cheaper to transport to the EU. However, for exporters it is important to get the correct fittings for the right RTA or knock-down system.

- ***Specific target groups:*** such as furniture for seniors or for the growing number of single households.

- ***Accessories:*** Exporters are recommended to present a series of furniture items and matching accessories, which may fit an interior concept. These accessories could range from fruit bowls, candle holders, vases, flower pots, lampshades, (carton or paper) storage boxes for e.g. linen etc.

Sub-contracting:

Some EU manufacturers look for new low-cost countries to outsource production of high volume items, while others look for exclusive items to meet the increasing diversity in demand in their country. Both cases offer prospects for new suppliers or partners, who could also be exporters from developing countries. Furniture is increasingly exported in semi-finished form (referred to as ‘parts’ in trade statistics in Chapter 5). The finishing is done in the consuming country, which ensures that it is finished to the required specification and quality level.

Requirements and difficulties for exporters:

- In order to approach the low and medium end of the market, competitive prices are necessary.
- Fast delivery (according to sample), good packaging, and after-sales service are required.
- Innovations are required in order to keep the interest of consumers, who are more demanding.
- As trends in home interiors change faster, it is difficult to start a long-term investment.
- Avoid using wood of (too) young trees, resulting in warped furniture that cannot be sold.

APPENDIX 1 HS CODE - DOMESTIC FURNITURE

HS Code	Product description
9401	**Seats**
	Seats, whether or not convertible into beds, and parts thereof n.e.s. (excluding medical, surgical, dental or veterinary seats).
Upholstered	
940161000	Upholstered seats (wooden frame)
940171000	Upholstered seats (metal frame)
Non-upholstered	
940140000	Seats convertible into beds
940169000	Seats - non upholstered, made of wood
940179000	Seats - non upholstered, made of metal
940180000	Other seats
Rattan	
940150000	Seats made of cane, osier, bamboo or similar materials
Parts	
940190300	Parts of seats, made of wood
940190800	Parts of seats, made of metal
9403	**Furniture**
	Furniture and parts thereof n.e.s. (excluding seats and medical, surgical, dental or veterinary furniture).
Kitchen furniture	
940340100	Built-in Kitchen furniture, made of wood
940340900	Other Kitchen furniture, made of wood
Dining and living room	
940360010	Dining and living room furniture, made of wood (excluding seats)
Bedroom furniture	
940350000	Bedroom furniture, made of wood
940320910	Beds made of metal
Rattan	
940380000	Furniture made of cane, osier, bamboo or similar materials
Other furniture	
940320990	Other furniture, made of metal
940360900	Other furniture, made of wood
940370900	Other furniture, made of plastic (excluding seats)
Parts	
940390300	Parts of furniture, made of wood
940390100	Parts of furniture, made of metal
940390900	Other Parts of furniture

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

This section gives Eurostat statistics covering the imports and exports of the EU and the selected EU countries. Also, import statistics of the selected product groups are given. Export statistics can be found at the end of this section. *Although in this market survey, the US$ is the basic currency unit used to indicate value, in these Eurostat statistics the values for dates after 1 January 1999 are also expressed in €. In 1999, the €/US$ exchange rate was US$ 1.06 for one € and in 2000 US$ 0.92 for one €.*

EU IMPORTS BY PRODUCT GROUP DETAILED

EU imports of furniture by product group detailed , 1998 - 2000 in tonnes and US$ / € 1,000

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	**19,158,206**	**5,574,952**	**19,861,763**	**18,737,512**	**6,589,375**	**19,434,916**	**21,124,909**	**7,232,528**
Intra-EU	12,155,539	**3,168,593**	11,898,555	11,225,052	**3,710,083**	10,780,933	11,718,405	**3,757,043**
Extra-EU	7,002,667	**2,406,359**	7,963,208	7,512,460	**2,879,292**	8,653,984	9,406,504	**3,475,485**
Developing countries	2,865,168	**864,541**	3,390,346	3,198,440	**1,116,658**	3,874,832	4,211,774	**1,362,371**
Detailed product groups:								
Upholstered seating	***2,786,637***	***520,844***	***2,862,561***	***2,700,529***	***639,302***	***2,752,309***	***2,991,640***	***625,739***
- wooden frame	2,410,819	**446,332**	2,461,353	232,203	**562,300**	2,339,462	2,550,013	**544,392**
- metal frame	375,818	**74,512**	401,208	378,498	**77,002**	412,847	441,627	**81,347**
Non-upholstered seats	***1,683,674***	***532,977***	***1,785,164***	***1,684,117***	***631,252***	***1,796,933***	***1,953,188***	***667,691***
- Made of wood	688,915	**188,117**	746,350	704,104	**218,625**	754,712	820,296	**233,692**
- Made of metal	317,535	**128,661**	376,549	355,234	**183,312**	377,356	410,148	**193,630**
- Other seats	405,883	**118,066**	399,817	377,187	**132,453**	395,326	429,778	**140,215**
- Convertible into beds	271,341	**98,133**	262,448	247,592	**96,862**	269,539	292,966	**100,154**
Dining and living room	***3,033,546***	***992,783***	***2,985,760***	***2,816,755***	***1,188,217***	***2,831,459***	***3,077,673***	***1,467,539***
Rattan furniture	***456,000***	***118,304***	***465,374***	***439,032***	***127,097***	***467,108***	***507,726***	***151,822***
- Seats- cane, osier, bamboo	204,662	**49,662**	205,502	193,870	**48,206**	205,528	223,387	**57,693**
- Furniture-cane, osier, bamboo	251,338	**68,642**	259,872	245,162	**78,891**	261,580	284,339	**94,129**
Bedroom furniture	***1,763,819***	***698,942***	***1,756,945***	***1,657,495***	***754,221***	***1,635,086***	***1,777,267***	***828,983***
- Made of wood	1,618,763	**642,755**	1,537,740	1,450,698	**686,886**	1,455,226	1,581,685	**754,374**
- Made of metal	145,056	**56,187**	219,205	206,797	**67,335**	179,860	195,582	**74,609**
Kitchen furniture	***860,233***	***261,702***	***860,129***	***811,442***	***386,623***	***759,857***	***825,932***	***291,366***
- Built-in units, wood	656,630	**191,742**	647,602	610,945	**289,447**	571,489	621,151	**218,146**
- Other, made of wood	203,603	**69,960**	212,527	200,497	**97,176**	188,368	204,781	**73,220**
Other furniture	***3,114,302***	***1,099,307***	***3,386,424***	***3,194,740***	***1,420,041***	***3,359,821***	***3,651,979***	***1,535,557***
- Made of metal	1,187,912	**404,506**	1,327,059	1,251,942	**620,095**	1,310,331	1,424,198	**675,645**
- Made of wood	1,504,992	**557,451**	1,612,809	1,521,518	**652,137**	1,574,757	1,711,794	**706,356**
- Made of plastic	421,398	**137,350**	446,556	421,280	**147,809**	474,733	515,987	**153,566**
Parts	***5,459,996***	***1,350,093***	***5,759,406***	***5,433,402***	***1,442,622***	***5,832,344***	***6,339,504***	***1,663,831***
- of seats, wood	153,361	**68,753**	171,330	161,632	**78,842**	174,970	190,315	**83,191**
- of seats, metal	3,142,204	**432,920**	3,442,050	3,247,217	**451,157**	3,499,406	3,803,504	**515,787**
- of furniture, wood	1,121,234	**554,748**	1,093,577	1,031,676	**534,973**	1,108,145	1,204,521	**615,617**
- of furniture, metal	680,215	**200,125**	680,983	642,437	**279,479**	699,881	760,701	**316,128**
- Other parts	362,982	**93,547**	371,466	350,439	**98,171**	349,942	380,463	**133,108**

Source: Eurostat (2002)

EU IMPORTS BY SOURCING COUNTRY

EU imports of furniture by major source, 1998 - 2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**19,158,206**	**5,574,952**	**19,861,763**	**18,737,512**	**6,589,375**	**19,434,916**	**21,124,909**	**7,232,528**
Intra EU	**12,155,539**	**3,168,593**	**11,898,555**	**11,225,052**	**3,710,083**	**10,780,933**	**11,718,405**	**3,757,043**
of which:								
Italy	3,455,505	**861,541**	3,277,808	3,092,272	**1,063,005**	2,922,801	3,176,958	**1,127,881**
Germany	2,397,008	**629,047**	2,529,754	2,386,560	**931,743**	2,441,644	2,653,961	**731,964**
France	1,016,805	**286,120**	1,002,783	946,022	**256,932**	964,517	1,048,388	**373,418**
Belgium/Lux.	941,338	**273,881**	863,028	814,177	**254,485**	782,686	850,746	**375,818**
Denmark	924,717	**261,875**	838,792	791,313	**288,136**	707,210	768,707	**241,394**
Spain	713,882	**200,387**	685,301	646,510	**209,644**	581,696	632,278	**205,908**
Sweden	600,983	**171,648**	613,383	578,663	**188,463**	562,080	610,956	**201,241**
Netherlands	616,794	**145,264**	590,302	556,889	**160,952**	506,226	550,246	**160,745**
Austria	511,221	**97,341**	520,607	491,139	**114,198**	433,303	470,981	**111,173**
United Kingdom	539,445	**143,589**	504,521	475,963	**140,621**	429,243	466,569	**121,741**
Extra-EU	**7,002,667**	**2,406,359**	**7,963,208**	**7,512,460**	**2,879,292**	**8,653,984**	**9,406,504**	**3,475,485**
of which:								
– Eastern EU	***3,407,196***	***1,372,730***	***3,746,873***	***3,534,786***	***1,529,873***	***3,992,831***	***4,340,034***	***1,864,687***
Main suppliers:								
Poland	1,401,204	**646,480**	1,512,335	1,426,731	**710,534**	1,643,479	1,786,390	**880,385**
Czech Rep,	561,519	**144,414**	631,684	595,928	**170,019**	639,070	694,641	**208,492**
Slovenia	383,480	**75,823**	449,414	423,975	**87,049**	434,141	471,892	**91,932**
Romania	369,207	**218,386**	363,787	343,195	**225,792**	376,186	408,898	**262,258**
Hungary	237,808	**56,502**	283,373	267,333	**62,973**	302,069	328,336	**71,536**
Slovakia	118,024	**63,168**	113,508	107,083	**64,057**	141,304	153,591	**78,518**
Estonia	95,501	**48,010**	105,220	99,264	**52,653**	109,431	118,947	**60,972**
Lithuania	43,796	**26,372**	64,597	60,941	**39,469**	88,991	96,729	**59,304**
Croatia	71,867	**27,702**	72,216	68,128	**32,322**	66,864	72,678	**38,318**
– Other countries	***1,013,171***	***259,217***	***1,161,391***	***1,095,652***	***337,672***	***1,143,572***	***1,243,013***	***371,369***
Main suppliers:								
Switzerland	345,774	**77,302**	390,808	368,687	**99,156**	348,403	378,699	**101,231**
USA	268,899	**50,520**	285,611	269,444	**53,364**	290,544	315,809	**57,528**
Taiwan	217,123	**76,009**	278,060	262,321	**107,875**	275,619	299,586	**111,374**
Israel	44,348	**13,165**	44,159	41,659	**16,323**	51,523	56,003	**20,708**
Russia	32,287	**21,420**	39,827	37,573	**30,993**	49,875	54,212	**49,748**
Canada	37,621	**8,413**	42,253	39,861	**10,889**	43,306	47,072	**10,317**
– Dev. countries	***2,865,168***	***864,541***	***3,390,346***	***3,198,440***	***1,116,658***	***3,874,832***	***4,211,774***	***1,362,371***
Main suppliers:								
China	429,883	**208,706**	612,365	577,703	**299,132**	855,224	929,591	**415,134**
Indonesia	621,625	**191,869**	702,388	662,630	**217,293**	755,748	821,465	**234,360**
South Africa	391,989	**41,030**	356,184	336,023	**56,362**	328,705	357,288	**52,333**
Malaysia	161,795	**63,889**	236,616	223,223	**104,235**	298,428	324,378	**136,543**
Vietnam	103,298	**41,880**	135,051	127,407	**57,877**	192,083	208,786	**80,075**
Thailand	125,147	**35,426**	202,658	191,187	**48,803**	243,449	264,619	**58,406**
Brazil	163,126	**66,498**	182,090	171,783	**85,138**	211,804	230,222	**106,362**
Turkey	93,128	**15,589**	111,822	105,492	**21,238**	114,330	124,272	**26,160**

(Source: Eurostat 2002)

EU IMPORTS FROM DEVELOPING COUNTRIES

EU imports of furniture by major developing countries, 1998 - 2000 in tonnes and US$ / € 1,000

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	**19,158,206**	**5,574,952**	**19,861,763**	**18,737,512**	**6,589,375**	**19,434,916**	**21,124,909**	**7,232,528**
Extra-EU	**7,002,667**	**2,406,359**	**7,963,208**	**7,512,460**	**2,879,292**	**8,653,984**	**9,406,504**	**3,475,485**
Dev. countries	**2,865,168**	**864,541**	**3,390,346**	**3,198,440**	**1,116,658**	**3,874,832**	**4,211,774**	**1,362,371**
Asia	***1,599,465***	***582,536***	***2,057,291***	***1,940,841***	***776,424***	***2,525,408***	***2,745,009***	***981,078***
China	429,883	208,706	612,365	577,703	299,132	855,224	929,591	415,134
Indonesia	621,625	191,869	702,388	662,630	217,293	755,748	821,465	234,360
Malaysia	161,795	63,889	236,616	223,223	104,235	298,428	324,378	136,543
Vietnam	103,298	41,880	135,051	127,407	57,877	192,083	208,786	80,075
Thailand	125,147	35,426	202,658	191,187	48,803	243,449	264,619	58,406
India	65,184	20,693	75,688	71,404	28,144	89,374	97,146	34,937
Philippines	73,396	16,145	73,282	69,134	16,495	66,432	72,209	15,679
Myanmar	5,292	927	6,778	6,394	1,058	11,028	11,987	1,793
South Korea	5,798	1,125	4,847	4,573	1,339	5,658	6,150	1,830
Pakistan	4,344	1,112	4,586	4,326	1,159	5,330	5,794	1,515
Iran	1,044	237	912	860	284	1,027	1,116	319
Sri Lanka	2,063	419	1,286	1,213	343	887	964	257
Latin America	***242,427***	***87,525***	***262,448***	***247,592***	***109,329***	***296,171***	***321,925***	***129,530***
Brazil	163,126	66,498	182,090	171,783	85,138	211,804	230,222	106,362
Mexico	64,183	17,143	59,129	55,782	17,929	58,304	63,374	16,624
Argentina	1,387	484	1,492	1,408	656	5,340	5,804	2,043
Chile	3,698	1,260	4,209	3,971	1,711	4,456	4,844	1,573
Uruguay	381	64	643	607	15	4,166	4,528	98
Bolivia	1,334	362	5,263	4,965	1,392	2,761	3,001	508
Guyana	1,515	428	2,263	2,135	551	2,721	2,958	585
Honduras	4,664	639	2,918	2,753	448	2,064	2,243	241
Peru	596	81	843	795	126	949	1,032	184
Costa Rica	246	67	1,474	1,391	477	896	974	293
Colombia	189	37	482	455	75	653	710	156
Ecuador	192	80	421	397	229	591	642	165
Africa	***414,242***	***49,927***	***373,138***	***352,017***	***63,055***	***346,323***	***376,438***	***58,956***
South Africa	391,989	41,030	356,184	336,023	56,362	328,705	357,288	52,333
Ghana	8,670	2,147	7,447	7,025	1,913	7,577	8,236	2,107
Zimbabwe	5,936	2,483	4,773	4,503	2,057	3,778	4,107	1,571
Côte d’Ivoire	2,197	1,013	761	718	381	1,134	1,233	532
Swaziland	3,596	2,524	1,982	1,870	1,491	1,069	1,162	882
Togo	67	41	236	223	110	985	1,071	382
Madagascar	421	176	606	572	299	671	729	245
Sierra Leone	76	14	5	5	3	645	701	77
Senegal	222	108	247	233	53	351	382	80
Kenya	236	84	215	203	106	335	364	232
Mediterranean and Middle East	***130,595***	***27,404***	***150,800***	***142,264***	***34,609***	***160,238***	***174,172***	***43,673***
Turkey	93,128	15,589	111,822	105,492	21,238	114,330	124,272	26,160
Tunisia	15,474	5,693	15,385	14,514	5,437	17,916	19,474	6,913
Morocco	7,504	2,753	9,598	9,055	4,023	11,643	12,655	5,933
Egypt	9,307	2,443	10,694	10,089	3,205	10,960	11,913	3,474
Oman	4,414	740	2,170	2,047	465	3,416	3,713	760

Source: Eurostat (2002)

IMPORTS BY SELECTED EU MARKETS

German imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**6,319,665**	**1,808,086**	**6,121,734**	**5,775,221**	**1,861,424**	**5,501,310**	**5,979,685**	**1,975,841**
Intra-EU	3,154,828	**756,775**	2,837,041	2,676,454	**725,769**	2,165,675	2,353,995	**608,988**
Extra-EU	3,164,837	**1,051,311**	3,284,693	3,098,767	**1,135,655**	3,335,635	3,625,690	**1,366,853**
Developing countries	952,892	**165,742**	1,001,203	944,531	**198,267**	1,001,572	1,088,665	**233,889**
Upholstered seating	983,921	**265,357**	952,326	898,421	**277,152**	867,127	942,529	**299,614**
Dining and living room	1,049,815	**327,432**	941,689	888,386	**309,963**	795,590	864,772	**331,883**
Non-upholstered seating	536,191	**195,107**	541,117	510,488	**208,802**	491,267	533,986	**217,963**
Bedroom furniture	603,870	**244,543**	537,013	506,616	**235,504**	442,337	480,801	**240,614**
Kitchen furniture	117,471	**37,297**	105,658	99,677	**41,916**	89,797	97,605	**44,640**
Rattan seats / furniture	101,379	**25,170**	94,983	89,607	**23,600**	84,446	91,789	**25,639**
Other furniture	829,266	**303,765**	833,165	786,005	**325,001**	730,076	793,561	**340,790**
Parts	2,097,751	**409,415**	2,115,782	1,996,021	**439,486**	2,000,671	2,174,642	**474,698**

Source: Eurostat (2002)

French imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**2,701,421**	**848,109**	**2,898,183**	**2,734,135**	**974,504**	**2,917,352**	**3,171,035**	**1,087,361**
Intra-EU	2,021,273	**579,986**	2,075,898	1,958,394	**628,555**	1,966,829	2,137,858	**678,822**
Extra-EU	680,148	**268,123**	822,285	775,741	**345,949**	950,523	1,033,177	**408,539**
Developing countries	358,121	**136,031**	438,464	413,645	**176,440**	528,028	573,943	**207,951**
Upholstered seating	467,447	**53,601**	471,044	444,381	**57,505**	436,843	474,829	**61,673**
Dining and living room	416,650	**155,031**	437,931	413,142	**174,774**	429,016	466,322	**197,135**
Bedroom furniture	277,193	**120,900**	295,418	278,696	**135,563**	279,727	304,051	**150,438**
Non-upholstered seating	266,604	**83,627**	278,648	262,875	**95,969**	267,449	290,705	**99,954**
Kitchen furniture	126,153	**48,861**	147,971	139,595	**58,061**	142,363	154,742	**67,152**
Rattan seats / furniture	68,528	**18,902**	80,112	75,577	**23,310**	95,376	103,670	**32,102**
Other furniture	523,727	**214,853**	578,776	546,015	**257,443**	581,869	632,466	**266,522**
Parts	555,119	**152,334**	608,285	573,854	**171,879**	684,710	744,250	**212,385**

Source: Eurostat (2002)

UK imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**2,302,987**	**690,350**	**2,590,391**	**2,443,765**	**944,253**	**2,851,261**	**3,099,197**	**1,081,279**
Intra-EU	1,396,624	**401,024**	1,398,040	1,318,906	**513,061**	1,396,661	1,518,110	**530,094**
Extra-EU	906,362	**289,326**	1,192,351	1,124,859	**431,192**	1,454,600	1,581,087	**551,185**
Developing countries	563,726	**201,984**	748,030	705,689	**295,603**	933,630	1,014,815	**382,145**
Dining and living room	356,108	**105,401**	371,058	350,055	**150,316**	428,185	465,419	**156,650**
Upholstered seating	331,914	**48,670**	380,701	359,152	**133,000**	425,529	462,531	**69,150**
Non-upholstered seating	211,011	**63,847**	244,689	230,839	**104,708**	297,014	322,841	**107,976**
Bedroom furniture	233,522	**76,706**	259,495	244,807	**103,431**	289,325	314,484	**125,239**
Kitchen furniture	89,436	**24,903**	86,936	82,015	**25,772**	83,208	90,444	**26,579**
Rattan seats / furniture	67,750	**16,441**	67,396	63,581	**16,497**	76,649	83,314	**20,418**
Other furniture	427,712	**139,799**	531,364	501,287	**192,820**	593,837	645,475	**350,154**
Parts	585,532	**214,583**	648,751	612,029	**217,709**	657,514	714,689	**225,113**

Source: Eurostat (2002)

Netherlands imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**1,598,483**	**459,348**	**1,615,809**	**1,524,348**	**498,341**	**1,511,013**	**1,642,405**	**501,026**
Intra-EU	1,064,820	**271,328**	1,031,604	973,211	**285,337**	867,451	942,881	**257,607**
Extra-EU	533,663	**188,020**	584,205	551,137	**213,004**	643,562	699,524	**243,419**
Developing countries	299,795	**107,125**	315,234	297,391	**119,285**	382,111	415,338	**141,925**
Dining and living room	284,166	**108,849**	290,500	274,057	**122,379**	272,872	296,600	**127,480**
Non-upholstered seating	153,565	**49,236**	165,751	156,369	**53,870**	189,250	205,706	**55,609**
Upholstered seating	207,063	**31,602**	211,305	199,344	**34,229**	183,995	199,995	**36,340**
Bedroom furniture	140,047	**59,547**	142,252	134,200	**64,587**	136,155	147,995	**69,225**
Kitchen furniture	193,196	**59,254**	186,113	175,578	**61,595**	138,000	150,000	**48,779**
Rattan seats / furniture	66,664	**20,465**	63,593	59,993	**18,319**	56,087	60,964	**16,551**
Other furniture	204,376	**71,702**	210,598	198,677	**80,195**	219,497	238,584	**91,594**
Parts	349,405	**58,693**	345,698	326,130	**63,167**	315,156	342,561	**55,448**

Source: Eurostat (2002)

Italian imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**645,238**	**229,262**	**757,488**	**714,611**	**286,826**	**765,023**	**831,547**	**334,832**
Intra-EU	338,782	**81,784**	381,633	360,031	**101,546**	365,197	396,953	**117,806**
Extra-EU	306,456	**147,478**	375,855	354,580	**185,280**	399,826	434,594	**217,026**
Developing countries	144,006	**71,068**	185,401	174,907	**94,360**	213,064	231,591	**115,618**
Non-upholstered seating	53,091	**17,869**	72,451	68,350	**26,359**	72,691	79,012	**29,654**
Dining and living room	59,233	**20,712**	71,547	67,497	**28,309**	71,044	77,222	**35,510**
Upholstered seating	40,695	**8,665**	43,853	41,371	**8,767**	48,086	52,267	**11,604**
Bedroom furniture	31,017	**11,360**	38,336	36,166	**15,971**	36,745	39,940	**18,599**
Kitchen furniture	21,851	**4,118**	25,792	24,332	**6,334**	22,595	24,560	**6,298**
Rattan seats / furniture	25,405	**6,425**	27,341	25,793	**7,150**	27,889	30,314	**8,188**
Other furniture	138,456	**43,610**	166,121	156,718	**57,213**	167,193	181,731	**68,335**
Parts	275,489	**116,503**	312,047	294,384	**136,723**	318,781	346,501	**156,644**

Source: Eurostat (2002)

Spanish imports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**593,416**	**199,110**	**630,134**	**594,466**	**189,803**	**769,564**	**836,483**	**240,848**
Intra-EU	485,477	**158,761**	467,177	440,733	**127,270**	580,730	631,228	**167,065**
Extra-EU	107,939	**40,349**	162,957	153,733	**62,533**	188,835	205,255	**73,783**
Developing countries	83,577	**34,263**	128,176	120,921	**53,386**	147,768	160,617	**62,308**
Dining and living room	82,681	**25,531**	86,791	81,878	**26,918**	118,030	128,294	**37,412**
Non-upholstered seating	48,506	**14,414**	53,153	50,144	**18,003**	66,481	72,262	**23,457**
Upholstered seating	38,677	**6,676**	35,690	33,670	**6,398**	45,083	49,003	**9,087**
Bedroom furniture	27,604	**8,831**	26,636	25,128	**8,485**	38,249	41,575	**16,436**
Kitchen furniture	23,143	**6,499**	24,376	22,996	**5,815**	35,094	38,146	**8,251**
Rattan seats / furniture	27,196	**7,718**	30,212	28,502	**7,660**	32,375	35,190	**8,509**
Other furniture	119,157	**36,885**	137,695	129,901	**43,554**	160,629	174,597	**57,641**
Parts	226,454	**92,556**	235,582	222,247	**72,970**	273,623	297,416	**80,055**

Source: Eurostat (2002)

EU IMPORTS OF SELECTED PRODUCT GROUPS BY SOURCE, 1998 - 2000

Tonnes and US$ / € 1,000

These tables list only the most important 3 suppliers and focus on imports from developing countries,

NON-UPHOLSTERED SEATING

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	**1,683,674**	**532,977**	**1,785,164**	**1,684,117**	**631,252**	**1,796,933**	**1,953,188**	**667,691**
Intra-EU	813,913	**208,254**	785,212	740,766	**235,329**	676,098	734,889	**203,677**
Extra-EU	869,761	**324,723**	999,952	943,351	**395,923**	1,120,835	1,218,299	**464,014**
Developing countries	434,190	**160,920**	557,343	525,795	**221,079**	687,484	747,265	**263,981**
Top 3 suppliers:								
Italy	334,828	**97,109**	304,097	286,884	**108,534**	237,682	258,350	**83,365**
China	108,557	**63,020**	159,582	150,549	**93,588**	224,925	244,484	**115,006**
Poland	212,629	**90,049**	213,085	201,024	**92,250**	203,815	221,538	**104,222**
Developing countries:								
Indonesia	141,499	**37,025**	173,934	164,089	**46,452**	194,374	211,276	**46,986**
Vietnam	41,322	**17,090**	54,384	51,306	**24,127**	80,012	86,970	**33,371**
Malaysia	31,485	**11,367**	39,162	36,945	**15,916**	45,517	49,475	**18,293**
Thailand	20,698	**7,292**	28,232	26,634	**9,522**	35,316	38,387	**11,727**
Slovenia	28,142	**5,597**	28,378	26,772	**6,059**	27,454	29,841	**6,767**
Brazil	7,990	**2,705**	8,787	8,290	**3,298**	10,236	11,126	**4,468**
Philippines	7,250	**1,411**	8,645	8,156	**1,645**	7,896	8,583	**1,853**
South Africa	5,046	**2,375**	5,848	5,517	**3,005**	7,526	8,180	**3,822**
Turkey	4,336	**2,181**	5,034	4,749	**3,026**	7,101	7,718	**4,158**
India	3,136	**1,052**	3,729	3,518	**1,357**	5,916	6,430	**2,624**
Myanmar	1,982	**253**	2,212	2,087	**258**	3,483	3,786	**467**
Tunisia	1,757	**648**	3,337	3,148	**1,144**	2,786	3,028	**1,210**
Mexico	2,016	**594**	1,726	1,628	**629**	2,168	2,356	**634**
Morocco	645	**241**	1,385	1,307	**521**	1,344	1,461	**681**

Source: Eurostat (2002)

DINING AND LIVING ROOM

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**3,033,546**	**992,783**	**2,985,760**	**2,816,755**	**1,188,217**	**2,831,459**	**3,077,673**	**1,467,539**
Intra-EU	1,909,419	**502,485**	1,773,268	1,672,894	**629,055**	1,492,216	1,621,974	**784,557**
Extra-EU	1,124,127	**490,298**	1,212,493	1,143,861	**559,162**	1,339,243	1,455,699	**682,982**
Developing countries	459,515	**175,941**	544,833	513,993	**223,915**	630,039	684,825	**267,747**
Top 3 suppliers:								
Italy	549,111	**115,111**	471,441	444,756	**211,752**	392,825	426,984	**296,333**
Poland	232,037	**128,455**	223,450	210,802	**127,615**	245,659	267,021	**167,136**
Denmark	299,764	**80,344**	277,520	261,811	**98,058**	216,212	235,013	**74,253**
Developing countries:								
Indonesia	134,617	**52,793**	148,918	140,489	**58,273**	166,164	180,613	**67,066**
China	61,366	**24,170**	85,324	80,494	**35,097**	122,697	133,366	**51,418**
Malaysia	47,139	**19,409**	68,889	64,990	**31,431**	82,470	89,641	**38,373**
Brazil	49,792	**18,376**	59,218	55,866	**25,310**	62,304	67,722	**28,814**
India	32,243	**11,454**	34,784	32,815	**14,635**	37,283	40,525	**15,953**
Thailand	18,005	**7,147**	24,151	22,784	**9,662**	30,883	33,568	**12,599**
Mexico	29,320	**12,201**	28,885	27,250	**12,602**	28,929	31,445	**11,425**
Vietnam	12,892	**4,962**	15,977	15,073	**6,587**	22,879	24,868	**8,993**
Slovenia	19,861	**7,077**	25,727	24,271	**10,373**	19,263	20,938	**8,784**
South Africa	11,999	**6,280**	11,412	10,766	**6,101**	11,117	12,084	**8,590**
Philippines	6,306	**1,334**	8,308	7,838	**1,828**	7,594	8,254	**1,624**
Ghana	7,325	**1,734**	6,571	6,199	**1,657**	6,956	7,561	**1,726**
Egypt	5,906	**1,395**	5,438	5,130	**1,682**	5,385	5,853	**1,810**

Source: Eurostat (2002)

BEDROOM FURNITURE

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**1,763,819**	**698,942**	**1,756,945**	**1,657,495**	**754,221**	**1,635,086**	**1,777,267**	**828,983**
Intra-EU	1,210,124	**431,786**	1,125,950	1,062,217	**440,713**	949,610	1,032,185	**436,906**
Extra-EU	553,694	**267,156**	630,995	595,278	**313,508**	685,475	745,082	**392,077**
Developing countries	190,655	**77,922**	245,597	231,695	**109,391**	283,903	308,590	**140,095**
Top 3 suppliers:								
Germany	262,295	**114,389**	263,003	248,116	**115,171**	230,833	250,905	**118,525**
Denmark	264,243	**86,644**	224,539	211,829	**87,800**	180,102	195,763	**74,645**
Poland	168,205	**105,458**	157,904	148,966	**103,148**	178,508	194,030	**135,693**
Developing countries:								
Brazil	59,002	**26,464**	69,481	65,548	**33,672**	83,772	91,056	**42,452**
China	32,502	**10,392**	51,856	48,921	**16,885**	67,413	73,275	**29,479**
Malaysia	25,436	**13,444**	49,013	46,239	**27,945**	65,069	70,727	**38,329**
South Africa	21,052	**11,421**	23,107	21,799	**13,448**	17,437	18,953	**11,235**
Slovenia	11,172	**3,409**	11,929	11,254	**3,834**	11,052	12,013	**3,568**
Indonesia	6,584	**2,573**	11,324	10,683	**3,980**	8,588	9,335	**3,312**
Vietnam	1,141	**414**	3,327	3,139	**1,259**	5,020	5,456	**2,107**
Philippines	3,998	**658**	4,723	4,456	**965**	4,116	4,474	**755**
India	2,380	**708**	3,154	2,975	**1,139**	3,565	3,875	**1,357**
Zimbabwe	5,153	**2,266**	3,013	2,842	**1,397**	2,371	2,577	**1,020**
Tunisia	2,513	**1,003**	2,195	2,071	**804**	2,066	2,246	**913**
Oman	4,198	**703**	809	763	**126**	1,890	2,054	**342**
Turkey	2,078	**631**	2,664	2,513	**639**	1,666	1,811	**840**
Thailand	335	**104**	787	742	**344**	1,464	1,591	**707**
Mexico	1,522	**446**	1,539	1,452	**478**	1,112	1,209	**429**
Chile	506	**162**	154	145	**39**	616	670	**180**

Source: Eurostat (2002)

RATTAN SEATS AND FURNITURE

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**456,000**	**118,304**	**465,374**	**439,032**	**127,097**	**467,108**	**507,726**	**151,822**
Intra-EU	138,823	**25,470**	146,167	137,893	**33,640**	127,575	138,668	**43,917**
Extra-EU	317,177	**92,834**	319,207	301,139	**93,457**	339,533	369,058	**107,905**
Developing countries	294,759	**85,783**	292,128	275,592	**84,367**	306,671	333,338	**97,409**
Top 3 suppliers:								
Indonesia	186,176	**49,083**	183,286	172,911	**47,220**	177,686	193,137	**47,636**
China	37,239	**16,833**	35,950	33,915	**16,772**	44,292	48,143	**24,126**
Italy	45,353	**9,100**	42,195	39,807	**7,903**	39,566	43,006	**8,322**
Developing countries:								
Philippines	39,544	**8,846**	36,177	34,129	**8,426**	33,627	36,551	**8,251**
Vietnam	14,902	**4,908**	15,512	14,634	**5,316**	22,661	24,632	**8,639**
Malaysia	7,423	**2,908**	8,706	8,213	**3,267**	12,526	13,615	**4,395**
Thailand	3,007	**763**	4,061	3,831	**1,069**	5,842	6,350	**1,407**
Myanmar	1,150	**270**	1,928	1,819	**290**	1,736	1,887	**356**
India	1,117	**273**	1,059	999	**259**	1,074	1,167	**280**
Brazil	349	**85**	477	450	**86**	1,047	1,138	**132**
Morocco	1,066	**412**	1,024	966	**490**	926	1,007	**486**
Turkey	775	**673**	1,031	973	**259**	850	924	**482**
South Africa	281	**142**	620	585	**189**	537	584	**180**
Mexico	118	**30**	271	256	**86**	373	405	**71**
Tunisia	307	**220**	363	342	**185**	336	365	**173**
Argentina	37	**4**	269	254	**23**	320	348	**32**

Source: Eurostat (2002)

OTHER FURNITURE

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**3,114,302**	**1,099,307**	**3,386,424**	**3,194,740**	**1,420,041**	**3,359,821**	**3,651,979**	**1,535,557**
Intra-EU	1,980,997	**624,528**	1,998,659	1,885,527	**793,291**	1,795,735	1,951,886	**769,133**
Extra-EU	1,133,306	**474,779**	1,387,766	1,309,213	**626,750**	1,564,086	1,700,093	**766,424**
Developing countries	470,436	**192,740**	629,995	594,335	**275,573**	770,986	838,028	**349,821**
Top 3 suppliers:								
Germany	394,605	**127,434**	403,232	380,408	**264,138**	398,423	433,068	**141,844**
Italy	475,140	**144,334**	485,550	458,066	**165,572**	395,593	429,992	**143,074**
China	131,700	**63,697**	188,757	178,073	**94,957**	264,937	287,975	**135,040**
Developing countries:								
Indonesia	115,882	**38,045**	143,049	134,952	**47,118**	167,101	181,632	**54,898**
Malaysia	18,663	**7,804**	32,441	30,605	**14,806**	53,493	58,145	**24,990**
Vietnam	26,853	**11,917**	38,262	36,096	**17,545**	51,013	55,449	**22,713**
Thailand	36,343	**11,518**	46,849	44,197	**16,755**	44,748	48,639	**16,055**
Brazil	29,734	**13,657**	24,510	23,123	**14,096**	38,740	42,109	**24,375**
India	16,345	**5,936**	24,314	22,938	**9,919**	31,211	33,925	**13,369**
South Africa	18,692	**10,989**	34,159	32,225	**23,160**	27,782	30,198	**18,838**
Slovenia	28,852	**12,742**	31,230	29,462	**14,608**	25,686	27,920	**13,244**
Philippines	10,993	**2,687**	11,007	10,384	**2,646**	9,445	10,266	**2,344**
Turkey	4,052	**1,766**	12,015	11,335	**4,225**	8,744	9,504	**5,040**
Mexico	6,637	**2,514**	8,839	8,339	**3,340**	7,904	8,591	**3,072**
Tunisia	5,799	**2,276**	5,088	4,800	**1,978**	7,353	7,992	**3,346**
Morocco	3,133	**1,139**	4,253	4,012	**1,971**	5,350	5,815	**3,008**
Myanmar	618	**120**	1,347	1,271	**263**	2,812	3,056	**486**
Egypt	1,316	**509**	2,799	2,641	**951**	2,751	2,990	**882**

Source: Eurostat (2002)

PARTS OF FURNITURE

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	**5,459,996**	**1,350,093**	**5,759,406**	**5,433,402**	**1,442,622**	**5,832,344**	**6,339,504**	**1,663,831**
Intra-EU	3,434,995	**913,955**	3,438,393	3,243,767	**916,619**	3,376,975	3,670,625	**1,024,464**
Extra-EU	2,025,000	**436,138**	2,321,013	2,189,635	**526,003**	2,455,369	2,668,879	**639,367**
Developing countries	862,755	**117,588**	933,897	881,035	**137,110**	988,775	1,074,755	**167,864**
Top 3 suppliers:								
Germany	800,271	**160,675**	871,525	822,193	**234,496**	951,736	1,034,496	**221,222**
Italy	719,074	**273,350**	683,185	644,514	**206,875**	675,930	734,707	**340,776**
Czech Rep,	368,761	**61,296**	437,335	412,580	**72,156**	436,478	474,433	**90,493**
Developing countries:								
Slovenia	274,347	**41,810**	332,732	313,898	**47,434**	331,815	360,669	**53,987**
South Africa	329,896	**7,515**	272,706	257,270	**6,673**	256,788	279,117	**6,714**
Thailand	31,568	**1,375**	76,971	72,614	**3,585**	94,497	102,714	**5,576**
Turkey	74,459	**7,188**	79,012	74,540	**7,809**	80,503	87,503	**8,702**
China	31,929	**19,284**	46,042	43,436	**24,743**	71,498	77,715	**36,711**
Indonesia	26,006	**9,233**	30,836	29,091	**10,557**	28,502	30,980	**10,132**
Malaysia	7,950	**2,525**	11,238	10,602	**3,181**	17,647	19,182	**5,373**
Mexico	20,825	**595**	16,060	15,151	**397**	15,484	16,830	**456**
India	8,958	**986**	7,978	7,526	**667**	9,409	10,227	**1,038**
Vietnam	2,250	**1,181**	3,946	3,723	**1,745**	6,100	6,630	**2,618**
Brazil	8,208	**2,401**	8,830	8,330	**4,513**	5,393	5,862	**1,905**
Uruguay	245	**6**	625	590	**12**	4,042	4,394	**69**
Pakistan	2,125	**229**	2,417	2,280	**238**	3,080	3,348	**353**
South Korea	1,938	**422**	2,356	2,223	**718**	2,635	2,864	**1,037**
Tunisia	2,289	**813**	2,477	2,337	**655**	2,396	2,604	**375**

Source: Eurostat (2002)

EUROPEAN UNION - EXPORTS

EU exports of furniture by EU country, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**21,809,159**	**5,070,031**	**21,599,816**	**20,377,185**	**5,759,333**	**20,978,211**	**22,802,403**	**5,843,752**
Italy	7,843,116	**1,614,282**	7,524,778	7,098,847	**1,622,383**	7,483,142	8,133,850	**1,836,886**
Germany	3,639,496	**891,085**	3,862,283	3,643,663	**974,669**	3,644,357	3,961,258	**1,034,276**
France	1,800,167	**408,258**	1,805,836	1,703,619	**439,250**	1,769,212	1,923,056	**482,223**
Denmark	1,659,936	**449,267**	1,609,895	1,518,769	**447,971**	1,495,073	1,625,079	**506,439**
Belgium/Lux.	1,406,394	**358,657**	1,348,212	1,271,898	**349,810**	1,273,738	1,384,498	**379,943**
Spain	1,275,994	**334,152**	1,170,778	1,104,508	**322,356**	1,244,193	1,352,384	**365,232**
Austria	861,550	**148,670**	979,652	924,200	**166,272**	969,884	1,054,222	**191,150**
Sweden	978,464	**346,717**	979,349	923,914	**414,438**	966,856	1,050,930	**449,497**
United Kingdom	1,004,664	**205,251**	995,832	939,464	**288,656**	936,642	1,018,089	**272,948**
Netherlands	657,710	**158,763**	708,438	668,338	**189,343**	609,429	662,423	**175,354**
Portugal	295,475	**59,097**	289,714	273,315	**54,162**	279,448	303,748	**54,777**
Finland	247,128	**62,855**	214,552	202,408	**59,741**	206,358	224,302	**64,232**
Ireland	111,210	**24,557**	88,669	83,650	**23,363**	80,687	87,703	**22,977**
Greece	27,852	**8,420**	21,836	20,600	**6,919**	19,190	20,859	**7,818**

Source: Eurostat (2002)

EU exports of furniture by product group, 1998-2000 in tonnes and US$ / € 1,000

	1998		**1999**			**2000**		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	**21,809,159**	**5,070,031**	**21,599,816**	**20,377,185**	**5,759,333**	**20,978,211**	**22,802,403**	**5,843,752**
Extra-EU	7,400,314	**1,606,193**	7,240,576	6,830,732	**1,601,820**	7,587,556	8,247,343	**1,867,500**
Upholstered seating	3,776,384	**387,813**	3,759,860	3,547,038	**414,110**	3,730,358	4,054,737	**476,574**
Dining and living room	3,200,969	**779,699**	3,015,017	2,844,356	**1,261,417**	2,747,555	2,986,473	**896,233**
Bedroom furniture	2,212,844	**769,726**	2,031,855	1,916,844	**747,086**	1,882,825	2,046,549	**818,979**
Non-Upholstered	1,559,654	**330,295**	1,615,190	1,523,764	**360,577**	1,516,419	1,648,282	**355,535**
Kitchen furniture	1,607,183	**380,550**	1,613,344	1,522,023	**415,238**	1,504,390	1,635,206	**437,374**
Rattan seats / furniture	578,532	**97,395**	561,549	529,763	**94,388**	562,787	611,725	**106,160**
Other furniture	4,318,887	**1,221,412**	4,248,685	4,008,193	**1,251,943**	4,165,876	4,528,126	**1,324,693**
Parts	4,554,706	**1,103,141**	4,754,316	4,485,204	**1,214,574**	4,868,001	5,291,305	**1,428,204**

Source: Eurostat (2002)

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL

International Standardisation Organisation (ISO)

Address: P.O.Box 56, CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 7490111
Fax: + 41 (0) 22 7333430
E-mail: central@iso.ch

Forest Stewardship Council (FSC)

Address: Avenida Hidalgo, 68000 Oaxaca, Oaxaca, Mexico
Telephone: + 52 (0) 951 46905/63244
Fax: + 52 (0) 951 62110
E-mail: fscoax@fscoax.org
Internet: www.fscoax.org

EUROPEAN UNION

European Furniture Manufacturers Federation (UEA)

Address: Rue Royale 109-111, 1000 Brussel, Belgium
Telephone: + 32 (0) 2 2181889
Fax: + 32 (0) 2 2192701
E-mail: uea@infoboard.be
Internet: www.ueanet.com/cen.html

GERMANY

Deutsches Institut für Normung (DIN)

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FRANCE

Association Française de Normalisation (AFNOR)

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2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15-2690390
Telefax: + 31 (0) 15-2690190
E-mail: info@nni.nl
Internet: www.nni.nl

APPENDIX 4 SOURCES OF PRICE INFORMATION

European Furniture Manufacturers Federation (UEA)
Address: Rue Royale 109-111, 1000 Brussel, Belgium
Telephone: + 32 (0) 2 2181889
Fax: + 32 (0) 2 2192701
E-mail: engels@uea.be
Internet: www.ueanet.com

Centro Studi Industria Leggera (CSIL)
Address: 15, Corso Monforte, 20122 Milano, Italy
Telephone: + 39 (0) 02 796630
Fax: + 39 (0) 02 780703
E-mail: csil@csilmilano.com
Internet: www.worldfurnitureonline.com

International Trade Center (ITC)
Address: Palais des Nations, P.O. Box 10,
1211 Geneve 10, Switzerland
Telephone: + 41 (0) 22 7300111
Fax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

APPENDIX 5 TRADE ASSOCIATIONS

EUROPEAN UNION

UEA - European Furniture Manufacturers Federation

Address: Rue Royale 109- 111,
B-1000 Brussels, Belgium
Telephone: + 32 (0) 2 2181889
Fax: + 32 (0) 2 2192701
E-mail: engels@uea.be
Internet: www.ueanet.com

BELGIUM

NAVEM - Nationale Beroepsvereniging van Meubelhandelaars

Address: Trade Mart (C Verdieping/Calcuta 206),
P.O. Box 613, B-1020 Brussels, Belgium
Telephone: + 32 (0) 2 4784716
Fax: + 32 (0) 2 4783766
E-mail: info@belgofurn.com
Internet: www.furniturecenter.be

DENMARK

Association of Danish Furniture Industries

Address: Center Boulevard5, DK-2300 Copenhagen
Telephone: + 45 (0) 70 268111
Fax: + 45 (0) 70 268332
E-mail: info@danishfurniture.dk
Internet: www.danishfurniture.dk

FRANCE

IFA - Industries Françaises de L’Ameublement

Address: 28 bis, avenue Daumesnil, 75012 Paris, France
Telephone: + 33 (0) 1 44681800
Fax: + 33 (0) 1 44681801
E-mail: europe.ifa@mobilier.com
Internet: www.meublefrance.com

GERMANY

HDH - Hauptverband der Deutschen in Holz und Kunstoffen Möbel

Address: Flutgraben 2, 53604 Bad Honnef, Germany
Telephone: + 49 (0) 222493770
Fax: + 49 (0) 2224937777
E-mail: info@hdh-ev.de
Internet: www.hdh-ev.de

BVDM/Bundesverband des Deutschen Möbelhandels e.V.

Address: Frangenheimstrasse 6,
D-5093 1 KöIn (Lindenthal), Germany
Telephone: + 49 (0) 221 403142
Fax: + 49 (0) 221 4009396

ITALY

AssArredo

Address: Foro Bonaparte 65, 20121 Milano, Italy
Telephone: + 39 (0) 02 806041
Fax: + 39 (0) 02 80604392
E-mail: assarredo@federlegno.it
Internet: www.federlegno.com

THE NETHERLANDS

CBM/ Association of Furniture Manufacturers (Dufex)

Address: P.O. Box 100,
2100 AC Heemstede, The Netherlands
Telephone: + 31 (0) 23 5158800
Fax: + 31 (0) 23 5315538
E-mail: info@cbm.nl
Internet: www.cbm.nl

CBW / Central Association for furniture retailers

Address: Arnhemse Bovenweg 100,
3708 AG Zeist, The Netherlands
Telephone: + 31 (0) 30 6973100
Fax: + 31 (0) 30 6919751
E-mail: info@cbw.org
Internet: www.cbw.org

SPAIN

ANIEME

Address: Vinatea, 22-1a planta - 8a,
46001 Valencia, Spain
Telephone: + 34 (0) 96 3153115
Fax: + 34 (0) 96 3924861
E-mail: info@anieme.com
Internet: www.anieme.com

F .E.C.M.I. Federacion Espanola de Comerciantes de Muebles

Address: C/ Juan Alvarez Mendizabal 3, 3e,
(Semiesquina a Plaza de Espana),
28008 Madrid, Spain
Telephone: + 34 (0) 91 5426842
Fax: + 34 (0) 91 5474937

SWEDEN

SMI - The Swedish Furniture Industry

Address: Box 14012, SE-104 40 Stockholm, Sweden
Telephone: + 46 (0) 8 230780
Fax: + 46 (0) 8 7830596
E-mail: info@mobelindustrie.se
Internet: www.mobelindustrie.se

UNITED KINGDOM

B.F.M. / British Furniture Manufacturers

Address: 30 Harcourt Street, London W 1 H 2AA,
United Kingdom
Telephone: + 44 (0) 171 7240851
Fax: + 44 (0) 171 7061924
E-mail: exports@bfm.org.uk
Internet: www.bfm.org.uk

Independent Furniture Manufacturers Association (IFMA)

Address: Norton Road, Newhaven, E Sussex BN9 0B2,
United Kingdom
Telephone: + 44 (0) 1273 513762
Fax: + 44 (0) 1273 516735
E-mail: info@ifma.co.uk
Internet: www.ifma.co.uk

APPENDIX 6 TRADE FAIR ORGANISERS

BELGIUM

Furniture Center Brussels (annual)
Address: Atomium square 1, P.O. Box 211,
B-1020 Brussels, Belgium
Telephone: + 32 (0) 2 5562555
Telefax: + 32 (0) 2 5562578
E-mail: info@belgofurn.com
Internet: www.furniturecenter.be

DENMARK

Scandinavian Furniture Fair (annual)
Address: Foreningen Dansk Mobelindustri, Center
Boulevard 5, DK-2300 Copenhagen, Denmark
Telephone: + 45 (0) 70 268111
Telefax: + 45 (0) 70 268332
E-mail: mail@danishfurniture.dk
Internet: www. danishfurniture.dk

FRANCE

Salon Internationale du Meuble (annual)
Address: C.O.S.P, 22 avenue Franklin Roosevelt,
75008 Paris, France
Telephone: + 33 (0) 1 40764500
Telefax: + 33 (0) 1 45637824
E-mail: f.maitre@cosp.fr
Internet: www.salondumeuble.com

GERMANY

International Furniture Fair - IMM (annual)
Address: Köln Messe- und Austellungs GmbH,
P.O. Box 210760, 50532 Köln, Germany
Telephone: + 49 (0) 221 8210
Telefax: + 49 (0) 221 8212574
Internet: www.furniturefair-cologne.de
or www.imm-cologne.de

ITALY

International Furniture Fair (annual)
Address: Cosmit Spa., Foro Buonaparte 65,
20121 Milan, Italy
Telephone: + 39 (0) 02 725941
Telefax: + 39 (0) 02 89011563
E-mail: press@isaloni.it
Internet: www.isaloni.it

THE NETHERLANDS

Meubelvakbeurs (annual)
Address: Royal Dutch Jaarbeurs, P.O. Box 8500,
3503 RM Utrecht, The Netherlands
Telephone: + 31 (0) 35 683 27 63
Telefax: + 31 (0) 35 683 61 48
Internet: www.jaarbeurs.nl or www.meubelvakbeurs.nl

Home Trade Center (permanent)
Address: Symfonielaan 1,
3438 EW Nieuwengein, The Netherlands
Telephone: + 31 (0) 30 600 10 20
Telefax: + 31 (0) 30 605 07 56
E-mail: info@htc.nl
Internet: www.htc.nl

SPAIN

FIM International Furniture Fair (annual)
Address: Feria Valencia, P.O. Box 476,
46080 Valencia, Spain
Telephone: + 34 (0) 96 3861100
Telefax: + 34 (0) 96 3636111
E-mail: feriavalencia@feriavalencia.com
Internet: www.ifema.es

UNITED KINGDOM

The Furniture Show (annual)
Address: Miller Freeman, 630 Chiswick High Road,
London W4 5BG, United Kingdom
Telephone: + 44 (0) 208 9877510
Telefax: + 44 (0) 208 7423644
E-mail: interiors@CMPinformation.com
Internet: www.furnitureuk.co.uk

Into Home (annual)
Address: Perfect Link, NEC Building, Birmingham,
United Kingdom
Telephone: + 44 (0) 8450 512610
Telefax: + 44 (0) 8450 512655
E-mail: info@autumnfair.com
Internet: www.intohome.co.uk

APPENDIX 7 TRADE PRESS

INTERNATIONAL
World Furniture International Market Review
Centro Studi Industria Leggera (CSIL)
Address: 15 Corso Monforte, 20122 Milano, Italy
Telephone: + 39 (0) 02 796630
Fax: + 39 (0) 02 780703
E-mail: csil@worldfurnitureonline.com
Internet: www.worldfurnitureonline.com

GERMANY
Möbelmarkt
Verlag Matthias Ritthammer GmbH
Address: Andernacherstrasse 5a,
90411 Nürnberg, Germany
Telephone: + 49 (0) 911 955780
Fax: + 49 (0) 911 9557811
E-mail: redaktion@ritthammer-verlag.de
Internet: www.moebelmarkt.de

Euwid Furniture Newsletter
Address: Euwid GmbH, P.O. Box 1332,
76586 Gernsbach, Germany
Telephone: + 49 (0) 7224 93970
Fax: + 49 (0) 7224 939910
E-mail: moebel@euwid.de
Internet: www.euwid.de

Möbel- Kultur
Ferdinand Holzmann Verlag GmbH
Address: Mexicoring 37, 22297 Hamburg, Germany
Telephone: + 49 (0) 40 6320180
Fax: + 49 (0) 40 6307510
E-mail: holzmann@holzmann.de
Internet: www.moebelkultur.de

FRANCE
Le Courrier du Meuble et de I'Habitat
Editions du Tigre
Address: 23, Rue Joubert, 75009 Paris, France
Telephone: + 33 (0) 1 48745250
Fax: + 33 (0) 1 40164365
E-mail: meuble@imaginet.fr

Revue de I' Ameublement
Editions du Tigre SARL
Address: 23, Rue Joubert, 75009 Paris, France
Telephone: + 33 (0) 1 48745250
Fax: + 33 (0) 1 45262918

Univers Hebdo
Address: 7, Rue de Paradis, 75010 Paris, France
Telephone: + 33 (0) 1 47706770
Fax: + 33 (0) 1 47706760

ITALY
Federmobili
Address: Cartesio Srl, Via Vincenzo de Filicaia 7,
1-10162 Milan, Italy
Telephone: + 39 (0) 2 66103539
Fax: + 39 (0) 2 66103558

Design Diffusion Editioni
Address: Via Lucano 3, 20135 Milan, Italy
Telephone: + 39 (0) 02 5516109
Fax: + 39 (0) 02 5456803
E-mail: infodde@designdiffusion.it
Internet: www.designdiffusion.it

THE NETHERLANDS
Wonen/CBW
Address: P.O. Box 762, 3700 AT Zeist, The Netherlands
Telephone: + 31 (0) 30 6973150
Fax: + 31 (0) 30 6919751
E-mail: wonen@cbw.org
Internet: www.cbw.org

Meubel
Address: Uitgeverij Lakerveld BV, Turfschipper 53,
2292 JC Wateringen, The Netherlands
Telephone: + 31 (0) 174 315000
Fax: + 31 (0) 174 315003
E-mail: info@meubel.nl
Internet: www.meubel.nl

SPAIN
ASEMCOM
Address: Promocion de Ediciones y Medios,
Santa Hortensia 15-4, 28002 Madrid, Spain
Telephone: + 34 (0) 91 914157240
Fax: + 34 (0) 91 915195606
Internet: www.spanishfurniture.com

El Mobiliario
Address: Cactus Press Ltd., Manresa, 2 Edif.El Chalet,
08860 Castelldefels, Barcelona, Spain
Telephone: + 34 (0) 93 6365300
Fax: + 34 (0) 93 6640828
E-mail: cactus@lander.es

Muebles De Espagna
Address: EDHISOA S.L, Avenida César Giorgeta,
30 esc. 1 pta. 4, 46007 Valencia, Spain
Telephone: + 34 (0) 96 3415494
Fax: + 34 (0) 96 3415497
Internet: www.spanishfurniture.com

UNITED KINGDOM
Furniture & Furnishing Industry 2001
(Directory to the Furniture Trade)
Address: Miller Freeman, 630 Chiswick High Road,
London W4 5BG, United Kingdom
Telephone: + 44 (0) 208 9877750
Telefax: + 44 (0) 208 7423644
E-mail: www.furnitureuk.co.uk

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL

International Trade Center (ITC)
Market News Service (MNS)
Division of Product and Market Development
Address: Palais des Nations, P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300111
Fax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA

Austria Federal Economic Chamber
Address: Wiener Hauptstrasse 63, 1045 Vienna, Austria
Telephone: + 43 (0) 1 501050
Fax: + 43 (0) 1 50206250
E-mail: hotline@wkoe.wk.or.at
Internet: www.wk.or.at

DENMARK

The Danish Import Promotion Office for products from developing countries (DIPO)
Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 950500
Fax: + 45 (0) 33 325216
E-mail: dok@commerce.dk
Internet: www.commerce.dk

FRANCE

COLEACP
Address: 5 Rue de la Corderie, Centra 342,
94586 Rungis Cedex, France
Telephone: + 33 (0) 1 41800210
Fax: + 33 (0) 1 41800219
E-mail: coleacp@coleacp.org
Internet: www.coleacp.org

GERMANY

BFAI, Federal Office of Foreign Trade Information, Germany
Berlin Office
Address: Scharnhornstrasse 36, P.O. Box 650268,
13302 Berlin, Germany
Telephone: + 49 (0) 30 20145200
Fax: + 49 (0) 30 20145204
Internet: www.bfai.de

Köln Office
Address: Agrippastrasse 87-93, P.O. Box 100522,
50455 Köln, Germany
Telephone: + 49 (0) 221 20570
Fax: + 49 (0) 221 2057212
E-mail: bfai@compuserve.com

ITALY

ICE
(National Institute for Foreign Trade)
Address: Via Liszt 21, 00144 Rome, Italy
Telephone: + 39 (0) 6 59921
Fax: + 39 (0) 6 59926900
E-mail: sitoece@ice.it
Internet: www.ice.it

THE NETHERLANDS

CBI
(Centre for the Promotion of Imports from developing countries)
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY

The Norwegian Agency for Development Cooperation (NORAD)
Address: Tolbugaten 31, P.O. Box 8034 Deo, Oslo,
Norway
Telephone: + 47 (0) 22 314400
Fax: + 47 (0) 22 314403
E-mail: postmottak@oslo.norad.telemax.no

SWEDEN

The Swedish International Development Cooperation Agency (SIDA)
Department for Infrastructure & Economic Cooperation
Address: S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Fax: + 46 (0) 8 208864

SWITZERLAND

OSEC
(Swiss Office for Trade Promotion)
Address: Stampsenbachstrasse 85,
8035 Zürich, Switzerland
Telephone: + 41 (0) 1 3655151
Telefax: + 41 (0) 1 3655221
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

United Nations Industrial Development Organisation (UNIDO)
Mr. Hallet (ext. 5265), Mr. Lewissianos (ext. 3715)
Address: P.O. Box 300, Vienna International Centre,
1400 Vienna
Telephone: + 43 (0) 1 26026
Telefax: + 43 (0) 1 2692669

International Tropical Timber Organisation (ITTO)
Address: International Organisations Center, 5th Floor,
Pacifico Yokohama, 1-1-1, Minato Mirai,
Nishi-Ku, Yokohama, 220 Japan
Telephone: + 81 (0) 45 2231110
Telefax: + 81 (0) 45 2231111

FAO - Forestry Department (FAO)
Publication and Information coordinator
Address: Ville delle Terme di Caracalla,
00100 Rome, Italy
Telephone: + 41 (0) 06 57054778
Fax: + 41 (0) 06 57052151
E-mail: Forestry-www@fao.org
Internet: www.fao.org/forestry/

EUROPEAN UNION

Association of the European Chambers of Commerce and industry
Address: Rue Archimède 5, P.O. Box 4,
B-1000 Brussels, Belgium
Telephone: + 32 (0) 2 2310715
Fax: +32 (0) 2 2300038
E-mail: eurocham@mail.interpac.be

Eurostat, Statistical Bureau of the European Union
Address: Rue Alcide de Gasperi, L-2920 Luxembourg,
Luxembourg
Telephone: + 352 (0) 4301 34567
Fax: + 352 (0) 4301 3015
E-mail: agnesn@eurostat.datashop.lu
Internet: www.eurostat.eu.int/eurostat.html

Corporate Intelligence Group (CIG) / Mintel
Address: 18-19 Long Lane, London EC1A 9PL,
United Kingdom
Telephone: + 44 (0) 207 76065932
Fax: + 44 (0) 171 6969004
Internet: www.cior.com or www.mintel.com

GTZ
(German Agency for Technical Cooperation)
Address: Dag-Hammerskjöld-weg 1-5, P.O. Box 5180,
65726 Eschborn, Germany
Telephone: + 49 (0) 6196 790000
Fax: + 49 (0) 6196 797414
E-mail: postmaster@gtz.de

THE NETHERLANDS

CBI
Centre for the Promotion of Imports from developing countries
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

Home Trade Center (exposition of furniture)
Address: P.O. Box 7207, 3430 JE Nieuwegein
Telephone: + 31 (0) 30 6047566
Telefax: + 31 (0) 30 6050756
Internet: www.htc.nl

Mileudefensie - Hart voor Hout lijn (tel: 31 20 6269161)
(Dutch Foundation for protection of tropical timber)
Address: Postbus 19199,
1000 GD Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5507300
Telefax: + 31 (0) 20 5507310
E-mail: www.service@milieudefensie.nl

Belasting Dienst Douane (Customs)
Dept. External and Internal Communication
Address: P.O.Box 50964,
3007 BG Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2904949
Special information number + 31 (0) 800-0143
Fax: + 31 (0) 10 2904875
Internet: www.douane.nl

CBI / AccessGuide c/o CBI, Centre for the Promotion of Imports from developing countries
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@accessguide.nl
Internet: www.cbi.nl/accessguide

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the list of developing countries from the OECD (Organisation for Economic Co-operation and Development), as applied in this market survey, may include countries that are not immediately being considered as developing countries (e.g. China).

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Gabon
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zaire
Zambia
Zimbabwe

Note: Eurostat figures do not include figures of Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau January 2000

APPENDIX 11 LIST OF RELEVANT IMPORTERS IN THE NETHERLANDS AND SELECTED EU MARKETS

NETHERLANDS IMPORTERS

Ahrend
(Importer of office furniture)
Address: Croy 1, 5653 LC Eindhoven
Telephone: + 31 (0) 40 2914200
Telefax: + 31 (0) 40 2914301
E-mail: ahrend@export.nl
Internet: www.ahrend.nl

Art of Living
(Importer of living and dining room furniture)
Address: Stolwijksestraat 55a, 3079 DN Rotterdam
Telephone: + 31 (0) 10 4362174
Telefax: + 31 (0) 10 4360644
E-mail: info@artofliving.nl
Internet: www.artofliving.nl

Bergers Interieurs BV
(Importer of furniture)
Address: Roderijseweg 23-25,
2651 BM Berkel en Rodenrijs
Telephone: + 31 (0) 10 5115133
Telefax: + 31 (0) 10 5116302
E-mail: info@bergers.nl
Internet: www.bergers.nl

Berkelrode BV Handelsonderneming
(Manufacturer/Importer of dining and living room furniture)
Address: P.O. Box 95, 2650 AB Berkel en Rodenrijs
Telephone: + 31 (0) 10 5114850
Telefax: + 31 (0) 10 5112781

Carpeti BV
(Importer of garden furniture)
Address: Kapt. Hatterasstraat 48, 5015 BB Tilburg
Telephone: + 31 (0) 13 5433155
Telefax: + 31 (0) 13 5432234

Den Uyl Handelsonderneming BV
(importer of rattan and wood)
Address: Dieselstraat 2, 8263 AE Kampen
Telephone: + 31 (0) 38 3370661
Telefax: + 31 (0) 38 3370664

Eurotan
(Manufacturer/Importer of dining and living furniture)
Address: Kanaal Z 120, 7332 BD Apeldoorn
Telephone: + 31 (0) 55 5394840
Telefax: + 31 (0) 55 5394839
E-mail: info@eurotan.nl

Frans Bijnen Meubelen BV
(Importer of furniture)
Address: De Run 4311, 5503 LP Veldhoven
Telephone: + 31 (0) 40 2541515
Telefax: + 31 (0) 40 2541225

Frezza Holland
(Importer of office furniture)
Address: Ridderpoort 11, 2984 BG Ridderkerk
Telephone: + 31 (0) 180 419606
Telefax: + 31 (0) 180 419680

J.C.J. Haans BV
(Importer of dining and living room furniture)
Address: Mina Krusemanweg 1, 5032 ME Tilburg,
Telephone: + 31 (0) 13 5947947
Fax: + 31 (0) 13 5947944
E-mail: info@haans.com
Internet: www.haans.com

Hamefa Furniture BV
(Importer of furniture)
Address: Duiveland 3, 1948 RB Beverwijk
Telephone: + 31 (0) 251 220351
Fax: + 31 (0) 251 221455
E-mail: Tijs@hamefa.com
Internet: www.hamefa.nl

Hoogebeen Interieur
(Importer of rattan and teak furniture)
Address: Dorpstraat 36-38, 3881 BD Putten
Telephone: + 31 (0) 341 353292
Telefax: + 31 (0) 341 360016

Key Trading BV
(Importer of furniture, including rattan)
Address: Oliemolenweg 9, 6871 NS Renkum
Telephone: + 31 (0) 317 313318
Telefax: + 31 (0) 317 319818

Mondirama Europe BV
(Importer of furniture, including rattan)
Address: Zuidhollandsedijk 181, 5171 TN Kaatsheuvel
Telephone: + 31 (0) 416 272315
Telefax: + 31 (0) 416 530073
E-mail: mondirama@wxs.nl
Internet: www.mondirama.nl

Montis BV
(Importer of living and dining room furniture, wall units)
Address: Steenstraat 2, 5107 NE Dongen
Telephone: + 31 (0) 162 377777
Telefax: + 31 (0) 162 377710
E-mail: info@montis.nl
Internet: www.montis.nl

Ross Tucker Meubelen
(Importer of colonial and rattan furniture)
Address: Feithspark 17, 9356 BX Tolbert
Telephone: + 31 (0) 594 516017
Telefax: + 31 (0) 594 512962
E-mail: mail@ross-tucker.nl

Some BV
(Trader of furniture, including rattan)
Address: Het Haagje 132, 7906 AD Hoogeveen
Telephone: + 31 (0) 528 274023
Telefax: + 31 (0) 528 274936

Steverink, Jan
(Importer of reproduction and garden furniture)
Address: Anholtseweg 40, 7091 HB Dinxperlo
Telephone: + 31 (0) 315 655130
Fax: + 31 (0) 315 341749
E-mail: info@jan-steverink.com
Internet: www.jan-steverink.com

Universo
(Importer of furniture)
Address: Kerkstraat 183, 1017 GH Amsterdam
Telephone: + 31 (0) 20 6231871
Telefax: + 31 (0) 20 4271161

Ufficio Benelux BV
(Importer of office furniture)
Address: Stuttgartstraat 22-24, 3047 AS Rotterdam
Telephone: + 31 (0) 10 4371244
Fax: + 31 (0) 10 4371287
E-mail: info@ufficiobenelux.com
Internet: www.ufficiobenelux.com

Zijlstra BV
(Importer of furniture)
Address: Edisonstraat 27, 4004 JL Tiel
Telephone: + 31 (0) 344 676767
Fax: + 31 (0) 344 676700
E-mail: info@zijlstra.nl
Internet: www.zijlstra.nl

BUYING GROUPS

Intres BV
Address: P.O. Box 150,
3870 CD Hoevelaken, The Netherlands
Telephone: + 31 (0) 33 2532911
Fax: + 31 (0) 33 2532299
E-mail: info@intres.nl
Internet: www.intres.nl

Euretco Wonen BV
Address: Archimedesstraat 17,
4816 BA Breda, The Netherlands
Telephone: + 31 (0) 76 5785597
Fax: + 31 (0) 76 5785753
E-mail: info@euretco.nl
Internet: www.euretco.nl

FURNITURE CHAIN STORES/ DIY STORES

Hartman Groep BV
(Importer of certified wooden garden furniture)
Address: Goolkatenweg 55, P.O. Box 505,
7521 BE Enschede
Telephone: + 31 (0) 53 4885555
Telefax: + 31 (0) 53 4335790
E-mail: marketing@hartman.nl
Internet: www.hartman.nl

IKEA Nederland
Address: P.O. Box 23055,
1100 DN Amsterdam ZO, The Netherlands
Telephone: + 31 (0) 20 5643888
Fax: + 31 (0) 20 6971824
Internet: www.ikea.com

Koophome
Address: Wijkermeerweg 43,
1948 NT Beverwijk, The Netherlands
Telephone: + 31 (0) 251 213668
Fax: + 31 (0) 251 213486

Leen Bakker B.V.
(Importer of knock-down furniture)
Address: P.O. Box 43,
4940 AA Raamsdonksveer, The Netherlands
Telephone: + 31 (0) 162 583100
Fax: + 31 (0) 162 516522
Internet: www.leenbakker.nl

Montel / Fauteuillerie
Nijman International B.V.
Address: P.O. Box 3039,
3502 GA Utrecht, The Netherlands
Telephone: + 31 (0) 30 2885455
Fax: + 31 (0) 30 2892880

W. Poppeliers Meubelen B.V.
Address: Videostraat 21,
1322 AA Almere, The Netherlands
Telephone: + 31 (0) 36 5365843
Fax: + 31 (0) 36 5366718

Sanders Meubelstad
Address: P.O. Box 32,
8050 AA Hattem, The Netherlands
Telephone: + 31 (0) 38 4431531
Fax: + 31 (0) 38 4446800
Internet: www.sanders.nl

Trendhopper International BV
Address: Plesmanstraat 1,
3833 LA Leusden, The Netherlands
Telephone: + 31 (0) 33 4343444
Fax: + 31 (0) 33 4343440
Internet: www.trendhopper.nl

Kwantum Nederland B.V.
Address: P.O. Box 90160,
5000 LK Tilburg, The Netherlands
Telephone: + 31 (0) 13 4626626
Fax: + 31 (0) 13 4637979
Internet: www.kwantum.nl

Intergamma BV (Gamma - DIY)
Address: P.O. Box 700, 3740 AR Baarn
Telephone: + 31 (0) 35 5485222
Telefax: + 31 (0) 35 5414002
Internet: www.gamma.nl

DEPARTMENT STORES

De Bijenkorf (Vendex/KBB)
Address: P.O. Box 12870,
1100 AW Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6526526
Fax: + 31 (0) 20 6973926
Internet: www.bijenkorf.nl

Hema (Vendex/KBB)
Address: P.O. Box 23220,
1100 DS Amsterdam, The Netherlands
Telephone: + 31 (0) 20 3114411
Fax: + 31 (0) 20 3114000
Internet: www.hema.nl

Vroom & Dreesmann Nederland (Vendex/KBB)
Address: P.O. Box 276,
1000 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5959111
Fax: + 31 (0) 20 6926150
Internet: www.vroomendreesmann.nl

MAIL ORDER

Morres Meubelbedrijven B.V.
Address: P.O. Box 40, 4560 VB Hulst, The Netherlands
Telephone: + 31 (0) 114 388388
Fax: + 31 (0) 114 319988

Wehkamp B.V.
Address: P.O. Box 400,
8000 AK Zwolle, The Netherlands
Telephone: + 31 (0) 38 4973311
Fax: + 31 (0) 38 4973495
Internet: www.wehkamp.nl

RELEVANT IMPORTERS IN THE SELECTED EU MARKETS

GERMANY

Bergmann GmbH
(Importer of country style furniture)
Address: Haferbachstrasse 9 - 15,
D-32791 Lage-Kachtenhausen, Germany
Telephone: + 49 (0) 5232 9740
Fax: + 49 (0) 5232 974355
E-mail: info@bergmann-moebel.de
Internet: www.bergmann-moebel.de

Elro Ellsässer GmbH
(Importer of dining and living room furniture)
Address: Graf-Benzelstrasse,
D-72108 Rottenburg/Neckar, Germany
Telephone: + 49 (0) 7472 98280
Fax: + 49 (0) 7472 982830
E-mail: info@elro-sitzmoebel.de

HABA, Habermaass GmbH
(Importer of children’s furniture)
Address: August-Groschstrasse 28-38,
D-96473 Bad-Rodach, Germany
Telephone: + 49 (0) 9564 929100
Fax: + 49 (0) 9564 3513
E-mail: habermaass@haba.de
Internet: www.haba.de

Hansen Lloyd Loom
(Importer and manufacturer of rattan ‘Loom’ furniture)
Address: An der Friedensburg 20-22,
D-52511 Geilenkirchen/Aachen, Germany
Telephone: + 49 (0) 2451 62060
Fax: + 49 (0) 2451 620690
E-mail: office@hansenrattan.de
Internet: www.hansenrattan.de

Incasa Natur. Holz. Möbel GmbH
(Manufacturer of wooden furniture)
Address: Auf der Frankenburg 11-13,
D-32839 Steinheim, Germany
Telephone: + 49 (0) 5233 94120
Fax: + 49 (0) 5233 7876
E-mail: info@incasa-moebel.de
Internet: www.incasa-moebel.de

Grombach GmbH & Co. KG
(Importer of furniture)
Address: Wiessenstrasse 20,
D-97215 Uffenheim, Germany
Telephone: + 49 (0) 9842 2020
Fax: + 49 (0) 9842 20250
E-mail: info@grombach.de
Internet: www.grombach.de

Locker GmbH
(Importer of rattan furniture)
Address: Wallweg 4, 96328 Küps, Germany
Telephone: + 49 (0) 9264 563
Fax: + 49 (0) 9264 6452
Internet: www.locker.de

Heinrich Kruger&Sohn GmbH
(Importer of rattan furniture)
Address: An der Kleimannbrucke 52,
4400 Münster, Germany
Telephone: + 49 (0) 251 328060
Fax: + 49 (0) 251 32892600

Gansberg Korbwaren GmbH
(Importer of rattan furniture)
Address: P.O. Box 105564, 2800 Bremen 1, Germany
Telephone: + 49 (0) 421 3995160

Hambur-Bergedorfer-Stuhlrohrfabrik
(Manufacturer of wooden and rattan chairs)
Address: Stuhlrohrstrasse 10,
21008 Hamburg, Germany
Telephone: + 49 (0) 40 7212041
Fax: + 49 (0) 40 7214879

FRANCE

Atelier du Vendelaise S.A.
(Importer of small wooden furniture)
Address: J.Y. Brault, 10 Rue de la Fontaine,
F-35210 Chattillon en Vendelais, France
Telephone: 33 2 99 761173
Telex: 33 2 99 761113

Anbry Gaspard
(Importer of rattan furniture)
Address: 3, Rue de la Baugerie,
544120 Baccarat, France
Telephone: 33 83 751268
Fax: 33 83 754545

JEFKA
(Importer of occasional furniture)
Address: BP 15, F-55130 Gondrecourt le Chateau,
France
Telephone: 33 3 29913022
Fax: 33 3 29897840
E-mail: export@jefka.fr
Internet: www.jefka.fr

Comptoir Commercial France Indochine
(Group of importers of rattan and wooden furniture)
Address: 32, boulevard Boues, 13003 Marseille, France
Telephone: 33 91 501778
Fax: 33 91 845362

Pierson
(Importers of country style furniture)
Address: ZI. de Chauvoncourt BP 28,
F-55300 Saint. Michiel, France
Telephone: + 49 (0) 6398 993101
Fax: + 49 (0) 6398 993102
Internet: www.pierson.fr

Vibel Provib
(Importer of children's furniture)
Address: 40 route de Vezelay,
F-89460 Bazarnes, France
Telephone: 33 386 425902
Fax: 33 386 422812
E-mail: dircom@vibel.com
Internet: www.vibel.com

ITALY

Bardola spa
(Importer of rattan furniture)
Address: Via Milite Ignoto 11, 16012 Busalla, Italy
Telephone: 39 10 9640791
Fax: 39 10 9644119116

Bornia Vittorio
(Importer of rattan furniture)
Address: Via Grave, 31020 S.Maria del Paive, Italy
Telephone: 39 4338 289920

Calligaris SPA
(Manufacturer and importer of tables, chairs and occasional furniture)
Address: Viale Trieste 12, I-33044 Manzano (UD), Italy
Telephone: 39 0432 748211
Fax: 39 0432 750104
E-mail: calligaris@calligaris.it
Internet: www.calligaris.it

Girasole International
(Importer of furniture)
Address: L. Negrellistr. 4, I-39100 Bozen, Italy
Telephone: 39 0471 240100
Fax: 39 0471 240101
E-mail: girasole@girasole.com
Internet: www.girasole.com

IMS Srl
(Importer of dining and living room furniture and parts)
Address: Via Parini 19, I-33044 Manzano (UD), Italy
Telephone: 39 0432 749411
Fax: 39 0432 749495
E-mail: ims@idgroup.it
Internet: www.idgroup.it/ims

Roberti Rattan
(Importer of rattan furniture)
Address: Z.I. Via Madonna di Loreto,
31010 Corbanese (TV), Italy
Telephone: 39 0438 933022
Fax: 39 0438 933005
E-mail: info@robeti-rattan.it
Internet: www.roberti-rattan.it

Sech Rattan spa
(Importer of rattan furniture)
Address: Via J F Kennedy 16, 310053 Barbisano, Italy
Telephone: 39 4338 840446
Fax: 39 4338 840449

Varaschin Spa
(Importer of dining room furniture)
Address: Via Cervano 20, 1-31010 Formeniga di
Vittorio, Veneto (TV), Italy
Telephone: 39 0438 933010
Fax: 39 0438 933004
E-mail: varaschin@varaschin.it
Internet: www.varaschin.it

UNITED KINGDOM

Ercol Furniture Ltd.
(Importer of dining and living room furniture)
Address: London Road, High Wycombe,
Buckinghamshire, HP13 7AE,
United Kingdom
Telephone: + 44 (0) 1494 521261
Fax: + 44 (0) 1494 462467
E-mail: sales@ercol.com
Internet: www.ercol.com

Caxton Furniture
(Importer of furniture)
Address: Springfield Road, Highbridge,
Somerset TA9 3AA, United Kingdom
Telephone: + 44 (0) 1278 787511
Fax: + 44 (0) 1278 781337

Frank Hudson & Sons Limited
(Importer of furniture)
Address: Roseberry Avenue, High Wycombe,
Bucks HP13 7AH, United Kingdom
Telephone: + 44 (0) 1494 522011
Fax: + 44 (0) 1494 436158

Link International Limited
(Importer of furniture)
Address: Bremhill, Highbridge, Caine, Wilts SN11 9LJ,
United Kingdom
Telephone: + 44 (0) 12+ 49 (0) 812121
Fax: + 44 (0) 1249 813435

New Heritage
(Importer of furniture)
Address: Unit 9, Sutton Oak Drive, Baxters Lane
Industrial Estate, St Helens,
Merseyside WA9 3PH, United Kingdom
Telephone: + 44 (0) 1744 811557
Fax: + 44 (0) 1744 850559

Oceans Apart Ltd.
(Importer of furniture)
Address: 24-26 King Street, Salford,
Manchester M3 7DG, United Kingdom
Telephone: + 44 (0) 161 8352003
Fax: + 44 (0) 161 8352320

Shelco Furniture Limited
(Importer of furniture)
Address: 10 Gorsuch Street, London E2 8HA,
United Kingdom
Telephone: + 44 (0) 171 7293125
Fax: + 44 (0) 171 7296778

Stax Trade Centres plc
(Importer of garden furniture)
Address: Units 1-4 Holloway Drive, The Wardley
Industrial Estate, Worsley,
Manchester M28 2LA, UK
Telephone: + 44 (0) 161 7288000
Fax: + 44 (0) 161 7288010

SPAIN

CRA Girona A Ripoll
(Manufacturer and importer of furniture)
Address: KM. 16 Banyoles, 17820 Gerona, Spain
Telephone: + 34 (0) 97 2570472
Fax: + 34 (0) 97 2574806

Milmueble S.A.
(Manufacturer of furniture)
Address: Ctra. Valencia, Barcelona KM. 145, Vinaros,
12500 Castellon, Spain
Telephone: + 34 (0) 96 4450166
Fax: + 34 (0) 96 4456788
E-mail: milmuebl@jet.es

Mobientorno S.A.
(Manufacturer and importer of furniture)
Address: San Martin, 30/pol ind, De Bobalar, Alaquas,
46970 Valencia, Spain
Telephone: + 34 (0) 96 1512221
Fax: + 34 (0) 96 507681

Mobledor
(Manufacturer and importer of country and reproduction furniture)
Address: c/Tapiceros 2,
E-46200 Paiporta (Valencia), Spain
Telephone: + 34 (0) 96 3973494
Fax: + 34 (0) 96 3960102

Muebles Treku S.A.
(Manufacturer and importere of children’s furniture)
Address: Olabidea 9, E-20800 Zarautz, Spain
Telephone: + 34 (0) 943 130840
Fax: + 34 (0) 943 130585
E-mail: treku@nexo.es
Internet: www.treku-mobiliario.com

Natuantaix S.A.
(Manufacturer of furniture)
Address: Carretera Santa, Barbara s/n, La Senia,
43560 Tarragona, Spain
Telephone: + 34 (0) 97 7709100
Fax: + 34 (0) 97 7709137
E-mail: antaix@safes.es

Talleres de Mobles Mattias Guarro S.A.
(Manufacturer and importer of furniture)
Address: C/Olzinelles 43, Barcelona,
08014 Barcelona, Spain
Telephone: + 34 (0) 93 4211322
Fax: + 34 (0) 93 4219330

Zadise Muebles Auxiliares S.L.
(Manufacturer and importer of furniture)
Address: Ctra. de Villena, s/n Yecla,
30510 Murcia, Spain
Telephone: + 34 (0) 98 8796957
Fax: + 34 (0) 98 8794519
E-mail: yecla@publiyec.com

Other Spanish importers can be found at:
www.spanishfurniture.com

APPENDIX 12 USEFUL INTERNET SITES

UEA - website: www.ueanet.com
This site has been set up by the UEA (European Furniture Manufacturers Federation) and provides information on European furniture markets, production, trade channels, imports/exports, technical developments, CEN quality standards and international trade fairs.
The latest developments in the EU furniture industry are covered in their newsletter and this site has linkages to other useful databases. For example to www.funstep.org with news on quality standards and the latest technology in furniture.

Csil - website: www.worldfurnitureonline.com
This site provides information on the international furniture industry and has a news service with summaries of their latest published market reports. It also gives a good selection of links to trade associations, publishers and organisations involved in the furniture and wood sectors.

Furnitureweb: www.furnitureweb.com
This site gives information on global market and production developments in furniture. Its main purpose is to provide contacts between furniture manufacturers on a global basis. Information on production-related items such as machinery, components and new products are also given on this site.

Corridor: www.corridor.com
This is an on-line trading system for the UK furniture industry. In addition, it provides information on the latest trends in the UK and International furniture markets, but also for floor coverings, lightening and furnishing accessories. It is a good possibility for contacting UK importers.

Ameublement: www.ameublement.com
This is an on-line trading system for the French furniture industry. In addition, it provides information on the latest trends in the French furniture markets and given contact details of French importers.

Spanish Furniture: www.spanishfurniture.com
This site is a database of Spanish furniture companies, along with the addresses of Spanish furniture manufacturers and importers. Information on this site is also given in English.
A similar useful site is www.infurma.com

Furniture Belgium: www.belgofurn.com and
www.furniturecenter.be
This site provides information on the Belgian furniture industry and provides profiles of Belgian furniture importers.

Rattan furniture: www.rattanlink.com and
www.furniture-indonesia.com
This site has been set up by manufacturers and traders of rattan furniture and provides information on wordwide markets, production, technical developments, quality standards and trade fairs.

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries.
To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information

- CBI News Bulletin (6 times annually);
- CBI guide “Exporting to the European Union”;
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, trade fair participation, Fashion Forecast etc.;
- CBI’s extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the GreenBuss database on European trade-related environmental policy and technology;
- CBI’ s Trade Documentation Centre offering supply-related information to importers, such as exporters’ directories, country and sector information, periodicals from developing countries, and - to visiting exporters - demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services

CBI’s computerized exporters’ and importers’ databases, containing around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)

Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:

- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development

- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO’s, aiming at supporting BSO’s in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations-specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation

CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

Mailing address:
CBI
P.O. Box 30009
3001 DA Rotterdam
Phone +31 (0) 10 201 34 34
Fax +31 (0) 10 411 40 81
E-mail cbi@cbi.nl
Internet www.cbi.nl

Office and showroom:
WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam,
The Netherlands.

Mailing address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Phone: +31 10 201 34 34 Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl Internet: http://www.cbi.nl
Office and showroom: WTC-Beursbuilding, 5th floor
37 Beursplein, Rotterdam, The Netherlands