InterTradeIreland

TRADE & BUSINESS DEVELOPMENT BODY

HOUSEWARE & SOFT FURNISHINGS

An Ireland retail perspective

NOVEMBER 2000

Housing boom boosts housewares sales.

Multiples move into homewares.

Home accessories offer growth potential.

Differentiation through design.

Retail partnerships for profit.

Contents

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Topline Summary

Market Size

The housewares market in Ireland was worth IR£526m in 1999 or STG£412m at retail prices. The four main product categories covered in this report are: soft furnishings, carpets, lighting, and mirrors and frames.

Northern Ireland accounts for STG£160m sterling or 39% of the total market, against IR£322m in the Republic.

The market is forecast to grow 20% by the year 2001, with the market in the Republic projecting 25% growth against 13% in Northern Ireland.

A sustained period of economic growth (7% forecast for 2000 in the Republic and 2.8% in NI) coupled with a buoyant residential housing market are the key drivers behind the housewares sector growth. The number of households is on the increase, with almost 60,000 new dwellings being projected annually for the next three years. The baby boom from the 70's is increasing the young/adult population, as is the significant number of immigrants returning home to exploit the benefits of the Celtic Tiger.

Segmentation

Soft furnishings is the largest and most important segment of the Irish housewares market accounting for 44% of the total market by value. Carpets account for 38%, lighting 12%, and mirrors and frames 6%.

Within housewares, the soft furnishings sector has experienced the highest growth of approximately 60% in the past five years. This is expected to continue with the recent influence of fashion designers and material innovation on product development. Window dressings, cushions and covers are the fastest growing product categories within this sector.

Higher disposable incomes, the influence of fashion, combined with consumer confidence and new lifestyle trends are all having an effect on the type of houseware products which Irish consumers are purchasing.

Manufacturing

Irish manufacturers' estimated share of the domestic housewares market is 25% (IR£132m). Their influence is strongest in the market for soft furnishings, kitchen textiles and carpets sectors, which are sold primarily through quality independent retailers and department stores.

Irish products are associated with high quality. Retailers expect a dynamic attitude from their suppliers and rely on them to introduce innovation in product styles and colours.

Retailing
Independent retailers dominate the Irish housewares market. Housewares are sold in furniture stores as part of the 'one stop shopping' concept and in specialist housewares, giftware and general homeware stores.

DIY stores are increasingly becoming an important distribution channel especially for durables such as flooring, lighting, and mirrors and frames.

Advertising and marketing
Advertising and marketing expenditure is dominated by the retailers, and press is the most popular media accounting for 63% of the total advertising expenditure in Ireland.

Retailers expect their suppliers to provide marketing and sales support in the form of brand support, brochures, staff training and retail support.

Future opportunities
The Irish market is expected to grow by 20% over the next two years, reaching a value of IR£630m by 2001. This offers Irish manufacturers substantial opportunities to increase sales.

Manufacturers need to consider several key success factors:

- New product developments to take account of changes in lifestyle, changing consumers tastes and international/European trends, and co-ordination with furniture trends.

- The pace of new product launches/updates needs to be accelerated to meet European competitors standards, ie every 2-3 years.

- Simple ranges of functional contemporary designs at affordable prices are common elements of the most successful ranges in the market today.

- More selective retail distribution with tighter key account management and retailer support programmes to include product training, display, brochures and territory exclusivity.

- Attendance at the various trade shows to view international and European designs/materials and to research upcoming trends in the wider furniture and fashion business.

Market Size

The housewares sector includes a wide range of household textiles and furnishing products; this report considers the following four categories in detail:

- soft furnishings
- carpets
- lighting
- mirrors and frames.

The Irish market for these houseware products was worth an estimated IR£526million in 1999 or STG£412million at retail prices. This represents a 55% increase since 1995.

Northern Ireland accounts for close to 39% of the market value, indicating that there is a higher expenditure level per capita in the North than in the Republic. However, the RoI market has been more dynamic over the recent five-year period, having increased by 66%, as opposed to 40% growth in NI.

Market Size (Retail Prices)

	1995[1]		1997[2]		1999[3]		5 year change %
	STG£m	IR£m	STG£m	IR£m	STG£m	IR£m	
NI	114	146	134	171	160	204	+40%
ROI	152	194	200	256	252	322	+66%
Total	**266**	**340**	**334**	**427**	**412**	**526**	**+55%**

Growth in the housewares market has been primarily driven by the soft furnishings sector, with almost 60% increase over the five-year period. This is highlighted in the 'Market segmentation' section of the report.

1 Source: Market Opportunities Report 1995 (ABT, IDB, IFI)

2 CSO estimate that the annual ROI household consumption of household textiles and furnishings in 1998 was IR£130m, excluding repairs. Carpets account for approximately 30% of the furniture & carpets category figure (IR£110m). Lighting and Mirrors & frames are included in the 'house appliances' section and are estimated to have accounted together for around IR£47m. The RoI housewares market can therefore be valued at IR£287 in 1998, up 12% from 1997.

3 PwC's latest market size estimates are based on an in depth analysis of the available statistics, a review of the current manufacturing/supply base and retail interviews across the country.

4 STG£1 = IR£1.2775;

Analysis of the import and export statistics for RoI is presented in the table below.

ROI – Import/Export Statistics 1997–1999 (IR£000s at import/production prices)

	Imports				Exports			
	1997	**1998**	**1999(e)**	**%**	**1997**	**1998**	**1999(e)**	**%**
Soft furnishings								
Window dressings	6,858	7,023	8,722	27%	474	803	788	66%
Bed linen	20,455	25,063	33,362	63%	2,405	3,784	3,126	30%
Throws	2,304	1,794	2,334	1%	20	46	16	(20)%
Table linen	4,623	4,031	3,500	(24%)	516	757	588	14%
Kitchen & Bathroom textiles	15,855	20,330	20,992	32%	11,254	15,650	14,332	27%
Filled bedding	5,030	6,214	7,340	46%	1,285	1,778	844	(34)%
Carpets	48,374	56,607	54,696	13%	36,352	36,750	33,022	(9)%
Mirrors and frames								
Mirrors *	2,412	3,550	2,852	18%	15,318	15,517	12,295	(20)%
Frames	3,382	2,717	3,708	10%	136	152	67	(51)%
Lighting *	16,919	23,168	26,010	54%	1,899	6,456	8,664	356%
Total **	**126,212**	**150,497**	**163,516**	**30%**	**69,659**	**81,693**	**73,742**	**6%**

1 Source: CSO Business Monitor (e) 1999 figures estimated based on Jan-Nov figures 98-99

* Exports of mirrors and lighting include some products with commercial/industrial purposes

** Figures are rounded

- Imports of furnishing products into Ireland in 1999 (at retail prices) accounted for approximately 75% of the housewares supplies. Northern Ireland is excluded from the above analysis as its trade figures are reported with the UK statistics. However, Northern Ireland is a significant importer of housewares and it is thought that similar or higher proportions of imports to indigenous supply (75-80%) will apply.
- Ireland's main trading partner is Britain, which accounts for the highest proportion of both imports and exports.
- Domestic sales by Irish manufacturers are not growing at the same rate as imports, which suggests that imported brands are gaining market share, although the situation varies considerably within the different market segments.
- Ireland's imports of bed linen are significant at around IR£33.3 million in 1999, an increase of 63% since 1997. Exports are low at approximately £3million.
- Both imports and exports of kitchen and bathroom textiles have increased by 32% and 27% respectively since 1997.

- Imports of curtains and blinds are significant compared to exports. Overseas sourced products were worth IR£8.7m in 1999, a rise of 27% on 1997 figures.

- Carpets are an important sector, with imports valued at IR£54.7m in 1999, an increase of 13% over the past 3 years. Exports on the other hand have declined by 9% since 1997, possibly displaced by sales in the domestic market.

- Imports of lighting are valued at IR£26m and experienced an increase of 54% over the past three years. The high levels of exports of lighting and mirrors are explained by the inclusion in CSO statistics of products with commercial purposes and also some imported items which were re-exported (to NI for example).

Factors Affecting Growth

Overall sales of housewares have been influenced in recent years by four key factors:

- The health of the economy, which impacts on consumer confidence and spending,
- The housing market,
- Product trends, and more recently,
- The fashion factor.

The health of the economy

The Republic of Ireland has experienced a sustained period of exceptional economic growth in the last five years with annual GDP growth of up to 8%. Despite recent EU Central Bank concerns about inflation levels, further GDP growth of 7% is predicted for the Irish economy in 2000. Significant numbers of immigrants are returning home to experience the new prosperity and are therefore having an effect on increasing the numbers of households. In March 2000 the Tanaiste and IBEC launched an initiative to attract 200,000 skilled immigrants in order to address potential labour shortages. Further detailed analysis of Ireland's economic performance is available at www.esri.ie

Northern Ireland's economic performance is more closely related to that of Great Britain, and in recent years the relative political stability has improved business confidence in the region. Between 1999/2000 the economy grew at 2.1% and this is expected to grow to 2.8% in the current year. In-depth analysis on Northern Ireland's economic performance and outlook is available at www.pwcglobal.com.or www.nisra.gov.uk

An all-Ireland analysis of the economic performance and retail market is presented in a document entitled 'Ireland – A £20 billion + Retail Market' and is available from development agencies.

The housing market

Irish Housing ROI and NI 1995-1999

		1995	1996	1997	1998	1999	% Change
Average house price IR£	ROI	56,341	62,340	71,860	88,144	105,098	+87%
Average house price £stg	NI	61,000	63,000	67,000	69,000	73,000	+20%
New dwelling completed (units)	ROI	30,575	33,725	38,842	42,349	46,500	+52%
New dwelling completed (units)	NI	8,463	8,556	10,168	10,077	10,583*	+25%
Total housing stock (units)	**ROI**	**1,091,000**	**1,115,000**	**1,145,000**	**1,177,000**	**1,212,000**	**+11%**
Total housing stock (units)	**NI**	**600,000**	**596,500**	**607,500**	**618,000**	**626,000**	**+4%**

Department of Finance and Personnel, DOE (NI) Bulletin of Housing Statistics, Department of the Environment & Local Government

Approximately 50,000 new dwellings have been completed per annum in Ireland in the past three years, compared to an average of 40,000 in the mid '90s. Sales of soft furnishings are closely linked to the performance of the housing market, as each new unit requires decoration.

At the same time, people tend to freshen up their homes by replacing some of the furnishings, rather than purchasing new furniture items, which requires a higher investment. TV shows and interior magazines have also had a major impact in recent years on individuals' perceptions of furnishings, encouraging homeowners to become more interested in the decoration and the maintenance of their homes.

'Everyone has moved focus from older to younger customers, addressing the specific needs of first time house buyers.

Arnotts

This growth in the housing and consequently in the housewares sector has also been influenced by demographic changes – the baby boomers from the '70s have now grown up and become first-home buyers, with a strong impact on sales of home decoration products, both in volume and style terms.

The ROI retailers who participated in our review have experienced sales growth of 15-20% in the previous financial year and are budgeting for the same level in the year 2000. In Northern Ireland growth levels have been less significant at around 10% in 1998-99.

'Influence from the clean, minimal living from Scandinavia and other European countries is getting strong'.

Tamlaght Interiors

Product trends

The pace of change in the Irish housewares market has accelerated considerably in the last five years. Trends in the furnishings market are being driven by a number of important factors:

- **Higher disposable incomes:** the effects of the Celtic Tiger have enabled a higher number of buyers to increase the number and value of their purchases.

- **Lifestyle trends:** young people have a higher disposable income, but at the same time a busier life, which means they prefer functionality and simplicity in furnishings, such as ready-made curtains. Easy-care materials have also been developed with this aspect in mind. The move away from formal dining has negatively affected sales of table linen.

- **Consumer confidence:** Economic prosperity, foreign travel and European influence have broadened Irish consumers horizons. The Irish market can no longer be described as a microcosm of the UK, and retailers/manufacturers must respond with a wider range of products, reflecting international styles.

Fashion

Housewares are increasingly perceived as fashion items. As a result, consumers are making more frequent purchases and replacements to keep up with the latest style and fashion trends.

From the manufacturers point of view this has repercussions on the adaptability of the product range to modern styles, colours and fabrics. Housewares fashion is now influenced by developments in the clothing and giftware sectors; although not as fast moving as clothing trends, the furnishings' life cycle has been reduced considerably to approximately 3 years for soft furnishings, 5-7 years for carpets, and 4 years for durables like lighting, mirrors and frames.

Many leading fashion designers are extending their apparel empires to homewares and soft furnishings. At the same time, many of the leading UK and European manufacturers have formed alliances with designers to develop comprehensive new product ranges. Designer ranges of houseware fashions include Ralph Lauren, Burberry and Jasper Conran brands, and many companies now offer specific children's design (e. g. linked to Disney or television characters). The influence of fashion and design is visible amongst Irish manufacturers such as Broomhill (Anna French and Bedeck ranges), Gina G, Carol Booth (mirrors), Starfish Designs and J Hackett (lighting).

The overall market is characterised by a significant increase in modern, contemporary styles and designs, with strong influence from the Scandinavian and European minimalist look. Traditional styles still hold a considerable share of the market, and they tend to be sold at the higher-end of the market. However, sales growth is relatively slow, and it is the new, modern styles that provide the highest growth potential.

Multiple retailers influence in the marketplace is visible in Ireland. Stores such as Habitat and Debenhams have stimulated demand for convenience, ready-made soft furnishings at affordable prices. Marks & Spencer and Next are following this trend and increasing their own soft furnishings offerings.

Other trends include:

- texture innovation in soft furnishings,
- the development of easy care materials, especially in linens,
- shorter life span of all products,
- focus on product design, and
- co-ordination of various furnishing items (textiles, carpets, lighting and frames).

The home furnishings and furniture industries are becoming increasingly interdependent due to their complementary ranges, and therefore some general retail and manufacturing issues and trends in Ireland are common to the two trades.

Market Segmentation

The housewares market in Ireland comprises a broad range of products, which often overlap with products in the furnishing and giftware markets. As stated earlier, this report concentrates on the four main segments: soft furnishings, carpets, lighting and mirrors and frames. Soft furnishings, in turn, is broken down into seven sub-segments.

The market structure, for the purposes of this report, is:

1. Soft Furnishings →
- **1(a) Window dressings**
- **1(b) Bed Linen**
- **1(c) Filled bedding**
- **1(d) Cushions & throws**
- **1(e) Table linen**
- **1(f) Kitchen textiles**
- **1(g) Bathroom textiles**

2. Carpets

3. Lighting

4. Mirrors and Frames

Market segmentation by product type 1999 (£ million)

Key segments	NI		ROI		Total		Market share (%)
	IR£	STG£	IR£	STG£	IR£	STG£	
Soft furnishings	89	70	142	111	231	181	44%
Carpets	78	61	123	96	201	157	38%
Lighting	24	19	38	30	62	49	12%
Mirrors & frames	13	10	19	15	32	25	6%
Total	**204**	**160**	**322**	**252**	**526**	**412**	**100%**

Source: PwC Estimates
Note: Figures are rounded

Based on the average buying budgets and reported sales of the retailers interviewed for this research, PWC estimate the share and value of the sub-segments of soft furnishings as follows:

Segmentation of soft furnishings by product type 1999 (£ million)

Key segments	NI		ROI		Total		Market share (%)
	IR£	STG£	IR£	STG£	IR£	STG£	
Window dressings	28	22	44	34	72	56	31%
Bed linen	24	19	38	30	62	49	27%
Cushions & throws	7	6	11	9	18	15	8%
Table linen	3	2	4	3	7	5	3%
Kitchen textiles	4	3	6	5	10	8	4%
Bathroom textiles	10	8	16	12	26	20	11%
Filled bedding	13	10	23	18	36	28	16%
Total Soft furnishings	**89**	**70**	**142**	**111**	**231**	**181**	**100%**

Source: PwC Estimates
STG£1= IR£1.2775

Note 1: Figures are rounded
Note 2: Kitchen and bathroom textiles are shown separately on this occasion.

1. Soft furnishings

This is the largest segment of the housewares market, accounting for 44% of the total market. It also represents the area with highest growth, around 60% over the past five years. Soft furnishings is the sector most influenced by fashion designs and material innovation, and therefore growth is expected to continue. Dynamics however vary from one sub-segment to another, as shown in the following paragraphs.

(a) Window dressings
This segment includes both curtains and blinds and accounts for 31% of the soft furnishings market by value or IR£72m in 1999. The market has experienced strong growth which has been driven primarily by ready-made curtains and blinds.

Ready-made curtains are increasing their market share and are soon likely to account for the bulk of curtain sales. Higher proportions of ready-made curtains are available in cotton and other high-quality fabrics and customers are offered a wider range of sizes in contemporary colours and designs.

Many manufacturers offer co-ordinated ranges, which include ready-made curtains along with other soft furnishings. Examples of pro-active and well performing brands include:

- Vantona – supplied by the leading UK manufacturer Coats Viyella, Vantona is a brand that targets the mid-market sector, providing a wide range of bedding, curtains and a choice of matching lampshades.

- Gina G – supply ready-made curtains and accessories, bed linen, cushion covers, table cloths and lamp shades as all-inclusive sets or as individual items; they have a policy of encouraging Irish suppliers where quality and design criteria are met. The company's main ranges include Shelbourne (traditional pattern), Regency (modern) and Accessories (modern).

- John Wilman and Coloroll – provide a complete range of soft furnishings, including wallpaper, fabrics, curtains, bedding and upholstery. The brand Coloroll covers products aimed at the affordable end of the market and are often supplied through DIY stores. John Wilman products are aimed at the top end of the market.

Although **custom-made curtains** are more expensive and require more time to purchase and fit, they are still popular amongst Irish customers. However, in the long term demand for custom-made curtains is likely to decline in response to the wider range and improving quality of ready-made curtains.

Specific trends in colours, styles and materials can also be noted in the market. Natural colours such as sand, terracotta, greys and browns dominate the offerings and complement the heavier materials of damask, jacquard and chenille. Young and cheerful ranges inspired by clothing fashion are also popular. White is still a core houseware colour. Creativity comes in design and special effects like metallic, etched, chameleon, or pearlised effects. Cotton and other high quality materials remain popular, and recently voiles and sheers have witnessed a considerable uptake.

With the move towards ‘ready-mades’, demand for curtain fabric is expected to decline in the long-term, although prospects are reasonably buoyant in the medium term. Most popular brands include names such as:

– Rectella – who recognised the importance of design and developed the Ports of Call range in association with Jeff Banks;

– Curtina – a well performing brand at the affordable end of the market, specialising in modern patterns and bright colours;

– Crowson – fine ranges of printed and woven fabrics & complementary products. The company regularly exhibits at international shows and is highly active in bringing new ranges to the market, introducing up to 12 new collections each year, aiming to set rather than follow fashion trends. This is backed-up by highly sophisticated technology and state-of-the-art production techniques.

– Harlequin – renowned primarily for the its contemporary collections; it also encompasses elegant traditional fabrics & wallcoverings in an attempt to address all tastes;

– Other commonly stocked brands in the Irish shops are Monkwell, from Cornwell Parker, and Sandersons – at the upper end, with a reputation for strong design input.

– Moygashel – compete well with these well-established names, providing quality material and appealing patterns, although is concentrated on more traditional/classic ranges; and

– Prestigious – a very popular local brand, available in most of the local home furnishings shops and department stores. The supplier, Poplar Linens, although based in Westport, actually imports the range from Brazil.

Sales of net curtains have been more or less static for many years. Traditionally they have an old-fashioned image and many younger homeowners now prefer to use blinds, where privacy or protection from the sun is required. The most popular brands in the Irish outlets are Paul Steiger and Filligree.

Blinds are gaining popularity, with demand having increased steadily in recent years. Louvre blinds and Austrian/Roman blinds are at the higher end of the market, with a more decorative appearance, whilst roller blinds are widely used because of their low price and availability of many sizes. Most manufacturers now offer a much wider range of fabric designs, allowing for co-ordination with other soft furnishings, which has accelerated the replacement cycle. Automatic features, which can adjust the angle of the blinds according to sun direction, have added value to the market.

Other factors such as relative ease of installation combined with cost effectiveness have helped boost the blinds market. These features match the DIY stores’ concept and as a result DIY stores have become a major distribution channel for blinds.

Widely available brands in Ireland are Integra, and TM Blinds. The Irish textile manufacturers do not have a strong presence in the blinds segment.

1(b) Bed linen

Nowadays most homeowners will own two or three covers for each duvet to enable frequent washing and a choice of different styles or colours. Duvet covers are also more fashion-influenced, and therefore are subject to more frequent replacements.

A key area of growth in recent years has been the children's market. This trend is only emerging in Ireland, but manufacturers such as Designers Guild and Broomhill have identified the opportunity and have developed successful ranges, selling primarily in shops at the upper end of the market, such as Brown Thomas. Typical themes include Disney films, cartoons, and sports and, with the popularity of the different characters changing frequently, the duvet covers make an ideal gift for children.

Imports of bed linen have grown considerably in recent years, forcing retail prices down, and reducing local manufacturers market share. Portugal is the most important source of imports. Other countries of origin include Spain, France, Turkey, and China.

One of the best selling brands in the affordable end of the market is Cannette, with its ranges of bright prints. The middle market is successfully targeted by Vantona and Dorma ranges – both manufactured by Coats Viyella. Broomhill's collections Anna French and Bedeck have also established a strong brand name and are performing well in the marketplace. At the upper end the traditional styles in high quality materials are dominant (natural and white colours, fine embroidery). Most of the brands selling at this level are imported, e. g. Sheridans from Australia, Shades of India, Versailles and Atrium (satin jacquards).

1(c) Filled bedding

Duvets containing synthetic filling materials account for approximately 70% of the market, as they are more price competitive than those based on natural materials. Another driver behind sales growth in this niche is increasing consumer awareness and concerns over allergies, which are often made worse by some natural fillings. Developments have been focused on improving the quality of artificial fibres to achieve an optimum combination of lightweight and a high level of warmth. Most popular natural fillings used in duvets include goose down, duck down and combinations of down and feather.

The market for **pillows** is less dynamic than duvets, with most purchases being for replacement purposes. Feathers are used to a greater extent for pillows. Latex fillings provide a firmer feel, but are more expensive and are targeted at the top end of the market. Product development in pillows is focused on introducing niche areas, such as extra large or shaped pillows or products targeted at consumers suffering from allergies.

King Koil has closely followed market demand and created innovative materials, making them the market leader. Northern Feather and Pownall & Hampson also sell well and have a good relationship with their key retailing accounts.

Other popular brands include Slumberdown, Down Home, Fogarty, Dunlopillow, First Impressions and Bedcrest.

> **‘We used to have difficulties in selling cushions for £9 and now they sell fast for £20’.**
>
> **Arnotts**

1 (d) Cushions and throws
The sector for cushions and throws has been buoyant in recent years. TV programmes and consumer magazines have had a particularly positive impact on sales in this market. Consumers are very receptive to new ideas on how to-easily and affordably – transform their rooms, by using fashionable throws or cushions.

Innovation in shapes (e.g. pyramid, cone) and materials (e.g. fur, silk, velvet silk, linen) have transformed cushions into fashion accessories, and this has resulted in consumers' willingness to pay more per item than before. Key retailers such as Brown Thomas acknowledged the presence and influence of the European and even American styles on the Irish market. Local designer labels include Seoda Home and Larissa Watson-Regan.

Loose throws, often in more expensive jacquard or velvet, have become a popular means of protecting upholstered furniture. Co-ordinating cushions are widely used and these are also becoming an important part of the giftware market.

1(e) Table linens
The move-away from formal dining has adversely affected sales in this area. Garden and outdoor eating represents a growth niche, and popular patterns include bright-coloured check design in waterproof material. Ferguson Linens and Ewart Liddell are present in numerous stores, although price competitiveness is becoming ever harder to maintain due to the increase of cheap imports from countries like Brazil and Pakistan.

Table linen and in particular Irish linen is also an important part of the giftware market. However, it is not an everyday usage item so sales are seasonal, driven by the tourism and wedding seasons.

1(f) Kitchen textiles
Kitchen textile sales have been steady over the past few years. Even though local manufacturers such as Ulster Weavers, Causeway, and Lamont have a significant market share, they hold a ‘slice’ of a relatively small and declining market. Key factors affecting the evolution of this market include: women's busier lifestyles which means less time spent in the kitchen, increased usage of microwave ready-meals which reduces the need for oven gloves, and competition from substitute materials – e.g. paper towels.

In the long term, sales are likely to be sustained by the growing number of households and a return to home cooking, as people become more conscious of healthy-eating.

Medium-term opportunities include better absorbing tea towels, such as those made of cotton. Growth potential also lies in the area of souvenir towels.

1(g) Bathroom textiles
This sector is dominated by towels and it also includes bathrobes, mats and toilet seat covers. The market is mature and most purchases are made for replacement purposes. Consumers' awareness of brands is low in this sector. Trespan Textiles and Lissadell Towels enjoy good reputations among retailers, although low-priced imports have affected their market share. Chortex, Christy, and Ashby are prominent in the middle ranges.

Ralph Lauren (US) and Santers (Belgium) feature at the upper price end, offering luxury ranges of towels and bathrobes.

NI carpet manufacturers need to lower prices by 30% to compete with the European imports.

NI carpet retailer

2. Carpets

Although floorcoverings are regarded as durables, and often represent a 'high ticket' purchase, they are not entirely immune from changing fashions. As a result, the carpet trade has been under pressure from increasing popularity of hard floors, especially those made of wood and laminates. Demand per capita for wood floors is higher in the North than in the South, where carpets still represent the main type of floorcovering.

Irish manufacturers are also being hit by a price decline, with imports increasing both at the cheaper end of the market (main sources: India, Pakistan, other Asia) and the middle-upper end, ie tufted carpets/carpet tiles (main sources: Belgium, UK). The retailers interviewed reported that Irish carpets are considerably more expensive than the imported ones but the public still like to see the local brands in the shops, with companies such as Navan, Ulster Carpet Mills and Kerry Rugs enjoying high brand awareness. Appreciated for quality, Irish carpets have a stronger appeal to the older buyer with significant disposable income and interested in traditional or classic style. Sales and after-sales service (e.g. fitting) is very important in the carpet trade.

'People don t buy a carpet for life any longer. Young people especially want something cheap and cheerful, which they can replace every five years or so, at pace with fashion trends.

Carpet Showrooms

In order to widen their customer base, manufacturers must diversify the product range and target the more fashion-orientated buyer. In the current market the minimalist look is preferred, with smaller design, detail motifs, and lighter colours such as light blue and cream, and neutral/natural/muted colours. Also life cycles should be shortened, as quality and durability are no longer the main purchasing criteria in this segment. Sales of expensive Axminster quality carpets have slowed due to the trend for shorter lifecycles and more frequent replacement.

Retailers commented favourably on Carpets International and Stoddard as manufacturers that have been active in managing their product portfolio, weeding out less popular lines while accelerating development of new ranges. However, English companies' market share has eroded in recent years in favour of overseas imports. Associated Weaves–a Belgian brand, successfully combine fashionable look, good finish, and affordable price; on the other hand, their carpets are regarded as not being as durable as most of the Irish products.

Carpet and rugs made of natural fibres such as seagrass, sisal or the synthetic imitations (e.g. Lano) is another area of growth. Crucial Trading have responded promptly to this opportunity and developed an extensive range of carpets and rugs made from natural fibres.

3. Lighting

There is a wide range of lighting products available on the market. The most dynamic sector is ceiling fittings, due to the popularity of 'ambient light', as opposed to chandeliers. The number of flats/apartments is on the increase and, as they tend to have lower ceilings, this aspect impacts on the length of the chandeliers and also contributes to increasing demand for ceiling fittings. Wall lighting is slightly in decline.

Occasional/free-standing lighting such as up-lighters has seen considerable growth and is now an important part of the giftware market. Key players on the retail side include Habitat, BHS and Debenhams. Alfrank, James Hackett and Starfish are successful Irish players in the market, having responded to market trends with creative designs and materials.

However the middle-market in Ireland, which provides the high volume, is largely serviced by foreign products. The German-made brand Brilliant offers modern stylish lighting at affordable prices, as well as excellent service (i.e.prompt deliveries, product training and point of sale materials) and this helps maintain a good relationship with retailers. English brands like Rochamps and Frank Light are also popular.

Local crystal companies like Tyrone and Waterford Crystal offer lighting products but are more successful in the giftware market and corporate/hotel sector.

Outdoor and security lighting are emerging as growth areas, but most ranges are presently imported.

4. Mirrors and frames

Leading retailers report exceptional growth in mirrors and frames in recent years, especially in the Republic of Ireland. The market has opened up across the sectors (affordable to upper end). The traditional mirror placed above the mantelpiece is still present in most homes, but the average number of mirrors in each household is on the increase.

Innovative shapes and colours (oval, curves, gold / silver leaf) are in demand, and a wider range of applications is emerging (bathrooms – solid glass, bedroom – fashionable look). Stylish mirrors and frames can now be purchased across the price range from £50 to £400.

There has been a discernible trend towards natural materials such as wood, slate and metal in the frames market, which has seen a number of new Irish entrants. Carol Booth has made inroads at the top end of the market with very creative designs. Local retailers also appreciate Roy Edwards products.

Key Housewares Brands in Ireland

The key housewares brands, which are performing well in Ireland, are listed below.

Key Housewares Brands in Ireland

	Soft furnishings	Table and Kitchen Textiles	Carpets	Lighting	Mirrors and Frames
Upper end	Zoffany Sanderson Dorma **Bedeck** **Northern Feather** (filled bedding) Crowson Harlequin Monkwell John Willman Ralph Lauren	**Fergusons Linens** **Ulster Weavers**	Wilton Royal Axminster Brintons **Ulster Carpet Mills** Victoria Carpets Louis de Poortere	Laurence Llewellan -Bowen **Tyrone Crystal** **Waterford Crystal**	**Carol Booth**
Middle Market	Vantona **Prestigious** Jane Churchill Rectella **Moygashel** **Anna French** **Designers Guild** **Gina G** Chortex Christy Eclipse Blinds Nimbus	**Ewart Liddell** **Lamont** **Causeway** **Lissadell Towels**	Kosset Abingdon Stoddard Templeton **Navan Carpets** Associated Weaves **Carpets International** **Munster Carpets** Stoddard	**James Hackett** CTO Lighting Alma Lighting Lynx **Starfish** Brilliant Rochamps **Lights on Broadway**	**Framanc** **Roy Edwards** **Carey Bros.**
	Northern Feather (sheets) **Pownall & Hampson** Curtina Coloroll Cannette Fogarty	**Trespan Textiles**	**Lancaster** **Kerry Rugs**	Poole Lighting Micromark	LP Frames

Bold text denotes Irish manufacturers

Source: PwC interviews

Retail Trends

'Layout of store and shop refitting boost sales.

Tamlaght Interiors

With housewares becoming increasingly popular, a wider distribution base is developing. Housewares are sold in **furniture** and **department stores**, as part of the 'one stop shopping' concept, and in **specialist stores**. Some limited offer is also available in giftware shops.

The Irish Housewares market, North and South, is still dominated by independent retailers. Local key players in soft furnishings are Harry Corry (22 stores) and Hickeys (12 stores). There is a relatively low presence of houseware retailers in the rural areas.

UK **multiples** have a stronger presence in the NI market - with 65% market share, compared to 25% in RoI, and they tend to focus on the lower/middle mass-market. The most significant players include Debenhams, Marks & Spencer, Habitat, BHS, Argos, Harvey's, and Texstyle World.

DIY stores are also an important distribution channel, particularly for durables like flooring, lighting, mirrors and frames. Traditionally they catered for the lower end of the market, although improvements in product range and quality have resulted in them appealing to an ever-wider market. Key players in this sector include the UK multiples and the Irish DIY multiples Atlantic Homecare and Woodies.

'Manufacturers should not sell direct to the public and should offer exclusivity to key accounts.

Arnotts

Associated Independent Stores (AIS) are a UK based **buying group** which has 18 members in Ireland spanning the furniture, homecare and fashion businesses. AIS have negotiated favourable terms with a number of leading suppliers and run regular exhibitions for their members.

A list of middle to better quality retailers which represent key accounts of the Irish manufacturers is provided at the end of this document.

Retailing in Ireland has evolved considerably in terms of standards of **merchandising, display and store layout**. These improvements are reflected in better sales per square foot.

Almost all the retailers who participated in our review were stocking Irish brands and some were rated among the best quality and best performing. However, the key message for Irish furnishings manufacturers is to shorten range life cycles and respond faster to trends in the market place.

'Irish manufacturers should focus on fewer accounts and work more in partnership with the retailers.

Caseys

Successful retailers such as Roches and Arnotts have expressed the intention to introduce/develop **own brand ranges**, made to their own specifications in order to increase sales (e.g. Karla Bree collection in Arnotts). This will result in more competition for existing Irish labels, but also an opportunity for manufacturers to increase business volumes through contract work.

The **Internet** is emerging as a distinct distribution channel, with potential to substitute the mail order route. From the manufacturers perspective, it offers various opportunities by acting either as a direct link with customers or as a link with retailers in business-to-business relations.

The number of active e-tailers on the net is more significant than that of manufacturers. A few reference sites are listed under the 'useful websites' section of the document. Mail-order companies have the advantage of an existing infrastructure (stocking, transporting and returns handling) and are likely to better manage the new electronic channel in the short to medium term. Although not yet transactional, some well presented manufacturer sites include Broomhill, Fergusons Irish Linens, Crowson, Harlequin, Ulster Carpet Mills and Navan Carpets. A large number of Irish manufacturers have a presence on the net through databases and links provided by the agencies.

3D images of products are expected to overcome the barrier imposed by the lack of 'touch-feel' factor in purchases of housewares. Another feature that will encourage actual purchases is the flexibility provided by inter-active choice and combination of products/fabrics/patterns, enabling a customised offer to each client's (retailer or individual) taste.

Pricing and Margins

Housewares mark up varies between the North and South. The average mark up in Northern Ireland ranges between 70-80% on cost (excluding VAT @ 17.5%) against 80-120% in the Republic (excluding VAT @ 21%). Imported products can attract mark ups as high as 200%, particularly those coming from the Far East.

In Dublin, key housewares retailers were achieving sales per square foot of IR£300-350 per annum, compared with an average of IR£150-250 elsewhere in the country. Northern Ireland has a higher density of housewares shops per head of population and tighter competition combined with slower economic growth has kept sales performance per square foot at around STG£100-150 outside Belfast and STG£250-300 in Belfast.

Manufacturers in Ireland

'Brand names are selling better in soft furnishings, as they are associated with quality

Walker & Co

According to Government records, there are over 200 companies in Ireland involved in the manufacture of housewares, ranging from small, design/gift orientated operations to large full automated manufacturing facilities. There is a higher concentration of large Irish manufacturers in textiles and carpets compared to the lighting and mirrors and frames business. Comprehensive listings of the firms involved in the housewares sector are available in publications such as Interior Furnishings Directory–LEDU, Manufacturing excellence in Northern Ireland CD ROM–a joint initiative from IDB and LEDU, and from Enterprise Ireland' s Gifts, Tabletop and Jewellery Directory 1999, also available on their web site under the Furniture & Furnishings database (www.enterprise-ireland.com).

It is estimated that Irish manufacturers control around 25% of the Irish homewares market. The focus of their domestic business is aimed at the better end independent retailers, where they compete with other established brands–mainly British and some European. Export sales depend heavily on the British market, which is 10 times larger than their domestic market. The cost of swatches of fabric and point of sale material is a significant inhibitor for smaller soft furnishings manufacturers at retail level. This factor also affects their competitive position.

The relative strength of sterling to the Irish punt makes UK manufacturers up to 20% more expensive at present, and as a result many Irish retailers reported that they would be increasing their expenditure on RoI manufacturers this year (2000).

The principal Irish housewares-manufacturing firms mentioned by retailers at the time of the review are listed below:

Key Irish Manufacturers

	NI	ROI
Textiles	Broomhill Causeway Textiles Decora Blinds Ewart Liddell Fergusons Irish Linen Glenanne Lamont Textiles Moygashel Stitchwell Ulster Weavers W. Baird	Avoca Handweavers Branigan Weavers The Cotton Box Gina G Jodi Manufacturing Jaquards Lissadell Towels Northern Feather (Ireland) Ltd Poplar Linens Porter House Pownall & Hampson (Ireland) Ltd Trespan Textiles
Carpets	Carpets International UK Ltd Regency Carpet Manufacturing Ltd Ulster Carpet Mills Ltd McMurray Carpets	Donegal Carpets Kerry Rugs Munster Carpets Navan Carpets
Lighting	Lights on Broadway Magowan Originals Starfish Designs	Aristocraft James Hackett Laverty Designs
Mirrors and frames	Roy Edwards Fine Arts	Carey Brothers Carol Booth Framanc Picture Mouldings

Note 1: Full details on these companies' contacts and products can be found in the directories mentioned above and further information is available at the agencies' relevent departments.

Source: PwC retailer interviews 2000

'General perception of Irish suppliers: good quality but old fashioned'

RoI Department Store

Traditional styles are still very much present in both the Irish and the British housewares markets and the transition to modern/contemporary designs by manufacturers must not be made as a replacement, but rather an extension of existing ranges. Offshore production may be an option for manufacturers who want to test the market for contemporary ranges prior to any domestic manufacturing commitment and minimising the disruption to existing operations. However, the responsibility for design, innovation and quality control needs to be retained at home.

Design has become a central issue in the industry, mirroring trends in the clothing and furniture markets. Key manufacturers in the UK and Europe now employ designers to create new patterns and styles in order to achieve individuality and improve brand awareness. Links with Art Colleges' Textile and Design courses are also an important source of market intelligence and design input.

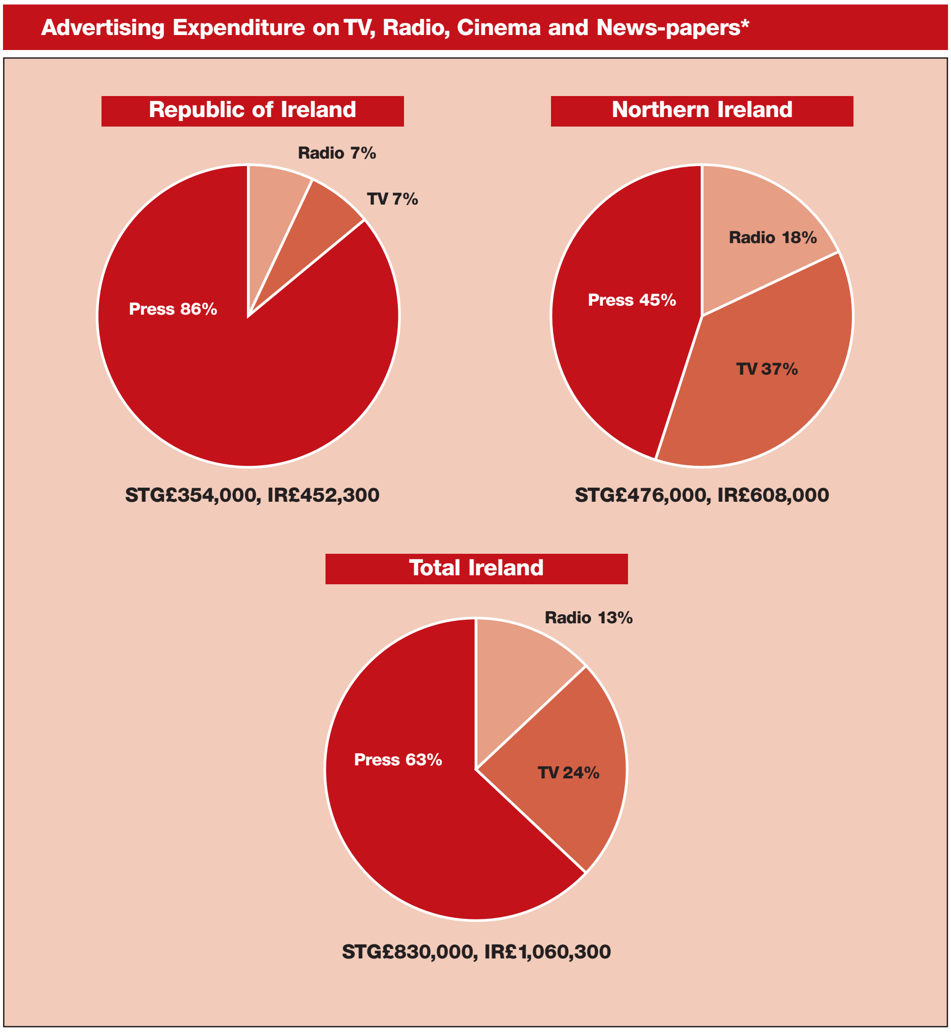
Until recently, Irish housewares manufacturing has lacked dynamism and relied on established traditional styles and colours. Successful European manufacturers update their ranges and introduce new lines every 2-3 years, while the average range life cycle in Ireland has been closer to 7-8 years. On the positive side, Irish products have always been associated with high quality.

Advertising and Promotion

Housewares advertising is undertaken almost entirely by retailers who accounted for 95% of total media expenditure in 1999. Four major carpet retailers – Des Kelly in the Republic of Ireland and Martin Phillips, Allied Carpets and Carpet Rite in the North -accounted for 64% of the total advertising expenditure in the housewares sector.

In the Republic of Ireland press is the most popular medium for furnishings advertising (86%), whilst in the North, television and radio are used more extensively (55%).

Advertising expenditure on TV, radio, cinema and news-papers*
(% Expenditure: 1999)



(% Expenditure 1999)

The key consumer magazines covering the housewares sector are Ireland's Homes Interiors & Living, Ulster Tatler, Irish Tatler, Elegant Homes. TV programmes such as Changing Rooms and the RTE show Beyond the Hall Door also play a major role in stimulating the Irish housewares market.

Since it is retailers rather than manufacturers who tend to be the major advertisers in this market, suppliers are expected to provide the following forms of **promotional support** for their products:

- **Brochures and promotional materials**
  Retailers require point of sale materials as well as brochures which can be given to customers. LEDU's Interior Furnishings Directory of houseware companies was mentioned by manufacturers as a positive initiative.

- **Merchandising/interior design**
  Consumers are increasingly looking for solutions rather than products. In furnishings terms this means that retailers must offer room concepts as well as individual products. Some retailers have spotted this opportunity and offer an interior design consultancy service and fully merchandised in-store displays. Manufacturers can increase their sales potential by co-operating with retailers and contributing with display set up and merchandising.

'Internet web sites are encouraging customers to shop around on price.

Wogans

- **Web sites/e-Business**
  Customers will frequently use the Internet to identify where they can buy particular products, making prices more transparent. It is important therefore to have a presence on the net. Retailers expect manufacturers to include them on their lists of stockists.

- **Trade fairs**
  Participation at trade shows or even visiting is a good way of meeting buyers and observing new product trends. The following exhibitions are relevant to Irish manufacturers:

  - **IntoHome** (Birmingham, NEC-May)
  - **Decorex** (London, Olympia-September)
  - **Decorative Interiors** (Birmingham, NEC-January)
  - **National Floor Show** (Harrogate-September)
  - **PlanExpo** (Dublin, RDS-November)
  - **Beyond the Hall Door** (Consumer orientated, Dublin-September)
  - **La Mia Casa** (Milan-November)
  - **Home Decoration Furnishings** (Munich-November)
  - **Heimtextil** (Frankfurt-January)
  - **Intercasa** (Lisbon-October)
  - **Now!** (Paris-January)
  - **Expohogar** (Barcelona-February, September)

Product knowledge and training
Factory visits and range demonstrations are very important to retailers and their sales staff, particularly where options on fabric or styles are extensive. Other European suppliers and in particular the English were praised in this respect.

Future Outlook

Ireland Housewares Market Forecast (£/¤ million)

	1995		1997		1999		change %
	STG£m	IR£m	STG£m	IR£m	STG£m	IR£m	
NI	160	204	169	216	181	231	+13%
ROI	252	322	283	362	315	402	+25%
All Ireland	**412**	**526**	**452**	**578**	**496**	**633**	**+20%**

PwC believe that the Irish Housewares market will continue to grow strongly. Total growth in the Republic will be double that of NI at 25% and 13% respectively.

Irish manufacturers share of the home market has scope to improve from 25% to 30%. This share figure may be even higher if further new product launches take place and retailer goodwill can be fostered.

Recommendations

Product range

- **Differentiation through design** is the key to sales growth in today's highly competitive environment. It is worth liasing with professional designers either on a consultancy basis or by developing in-house resources. Local colleges of Art and Design can also offer valuable resources in terms of product development ideas. The second issue is pattern and colour flexibility. Innovation is essential – range updates should occur on a periodic basis (every 2-3 years), as well as seasonal changes in fabric/materials which respond to fashion trends.

- **Simplicity, functionality, affordability and contemporary design** are common elements of the most successful ranges in the market today. While there is clearly considerable potential left in the more traditional styles for which Irish industry is known, there is a need to supplement proven ranges with a more contemporary offer, since this is the direction where the market is developing.

- **Target markets and Segmentation of products** are needed for Irish manufacturers' offer to be more market led and more targeted, and that implies range segmentation once the target segments have been identified. For example, the leading UK manufacturer Coats Viyella offers two different brands for the same type of product: Dorma is the company's major brand and is regarded as the leading supplier of bed linen, while Vantona is a more mid-market brand, supplying a wide range of bedding and curtains. Broomhill have become one of Ireland's most successful companies by responding to specific market segments requirements.

- **Product opportunities** – the following specific retail trends were recorded during trade research contracted between January – June 2000:
  - Ready-made curtains in plain and abstract designs.
  - Voiles and sheers in curtain fabrics.
  - Matching sets of soft furnishings.
  - Bed linen for the affordable end of the market, with medium durability, bright colours, in abstract patterns.
  - Souvenir tea towels.
  - Table linen suitable for outdoor eating in bright colours and check design.
  - Modern carpets including lighter duty carpets at the middle market ranges.
  - Large rugs to accessorise wooden/parquet floors.
  - Accessories such as cushions, and covers; material innovation is essential in cushions as these are bought mainly to reflect individuality and style, and therefore are less price sensitive.
  - Modern style lighting products: organic shapes, opaque glass to give off ambient light creating a soft and gentle atmosphere. New innovations include light kits for self-assembly encompassing shade and optional bases for table, floor and clip on to furniture.
  - Outdoor lighting.
  - Creative shapes in mirrors and frames.

Retail partnerships

- **Service levels** – Irish manufacturers have been over reliant on their agents to handle the customer interface. Sales can be delegated to the agent but the marketing effort cannot and it is imperative for Irish manufacturers to review their key accounts and get out to meet them to understand their needs. Retailers recommend a more 'aggressive' attitude from manufacturers in pursuing business potential and follow-up leads. At the same time, retailers consider loyalty and exclusivity from the manufacturer in their specific geographic area to be one of the best forms of marketing support. Attention to service levels can also help improve manufacturers' relationship with retailers, with increased flexibility regarding supply capacity, delivery times, after-sale service and factory visits.

- **Less width and more depth** in terms of retail distribution strategy; fewer, well-chosen and well-supported retail accounts will yield better returns than numerous accounts buying a minimum range. Accounts should be selected on the basis of regional spread, compatibility with the brand positioning, consistency on pricing and margin and high standards of merchandising and display. In return manufacturers should offer exclusivity (geographically or for particular ranges), product training, merchandising support, minimum performance criteria and contribution to promotional costs.

E-Business – a new route to market

Forecasts for e-Business value vary from one source to another, but there is one common message: the Internet will become an additional and important channel for companies sales. Business via the Internet offers the Irish manufacturer the potential to widen its customer base.

This is a totally new environment for doing business and associated aspects have to be considered from the early stages in order to make a successful start:

- direct sales to customers may provide an opportunity to increase sales, but adequate logistics (i.e. transport, stocking, and communication systems) are required to complete transactions; another 'trap' can be channel conflict arising from selling the same product both through retailers and direct on the web; this aspect can be counteracted by providing only specific ranges via the internet, so that the retailers do not feel threatened by direct competition. Featuring in selected e-tailers' web sites can attract a new income stream, and even if the site is not transaction-enabled, this is still an important means of information and promotion towards the end consumers.

- significant advantages will come from business-to-business electronic relations. More buyers will have access to the manufacturers products and efficient communication with all trade customers can be obtained by creating extranets that enable quick and accurate receiving, processing and dispatching of orders, as well as sharing common information on industry trends.

Market knowledge

Market knowledge is essential to survive in these highly competitive times. In order to have a market led strategy manufacturers should gather information and keep up to date with competitive activity. The methods employed can vary from market studies carried out by marketing consultants to other useful and less costly methods of data collection; examples include:

- Structured, regular feedback and contact reports from agents/representatives;
- Attendance at trade shows, even if not exhibiting;
- Store visits to observe new ranges, display lay-outs and consumers' buying behaviour;
- Customer satisfaction surveys;
- Internet searches on e-tailers and other manufacturers' sites; and
- Focus groups with representative consumers.

Key Houseware Retailers

Key houseware retailers in Ireland

Retailer	Locations	Outlets	Buyer/owner	Telephone No.
Department stores NI/RoI				
Arnotts	Dublin	1	Michael Howard – Linens Paddy O'Mara – Window dressings Richard Elliot – Lighting	+353 1 872 1111
Austins	Londonderry	2	Anne McGinnis Bernie Feeney	+44 28 7126 1817
Brown Thomas	Dublin Cork Galway Limerick	4	Michael Keegan – Furnishings	+353 1 605 6666
Cameron's	Ballymena	1	Karl Windal John Reynolds	+44 28 2564 8821
Clerys	O'Connell Street Sandyford Blanchardstown	3	Jeff Dipple – Soft furnishings Jim Culhane – Carpets	+353 1 2941710
Dunnes Stores Ltd	NI RoI	26 82	Teresa Rafter – Housewares	+353 1 475 1111
Heatons	NI RoI	3 19	Mark Heaton	+353 1 451 9811
Houstons	Banbridge Armagh Ballymena Enniskillen Lurgan	5	John Houston	+44 28 3751 0110
McEvoy's	Dundalk Strabane Dungannon	3	Teresa McEvoy	+353 42 933 3030
Menarys	NI	15	Sheila Henderson Alan Hoggshaw	+44 28 8772 3467
Moores of Coleraine	Coleraine	1	Nevil Moore Glenda Moore Wilson	+44 28 7034 4444
Primark Ltd (Penneys)	RoI NI	35 6	John Harrington	+353 1 872 7788 +44 28 9024 2288
Roches Stores Dublin	RoI NI – Newry	12 1	John Macaloon – Hardware Jerry Buckley – Soft furnishings	+353 1 873 0044
T F Woodside & Co Ltd	Ballymena Bangor Larne Lisburn	4	Mervin McConkey	+44 28 2564 9309
W H Good Ltd	Kilkenny	1	Anne O'Neils	+353 56 22143

Northern Ireland Retailers

Broadwater Interiors	Aghalee	1	Helen Kennedy	+44 28 9261 2612
Creations	Belfast Ballymena Lisburn	3	Stephen Anderson	+44 28 2564 9787
Fabric World	Londonderry	1	Paula Murphy	+44 28 7137 1603
Finaghy Furnishings	Belfast	1	Mark Douglas	+44 28 9061 4527
Fultons	Belfast Enniskillen Lurgan	3	Keith Irwin Cyril Fulton	+44 28 3831 4600
Hampton Interiors	Hillsborough	1	Paul Bell	+44 28 9268 2500
Harry Corry	Belfast	22	Willie Corry Anne Hill	+44 28 9061 8521
Homessentials	Magherafelt	1	Mark Dickson	+44 28 7930 0157
Illuminate	Ballymena	1	Loraine Redmond Dereck Murdock	+44 28 2564 1134
Martin Philips Carpets	Belfast Carrickfergus Downpatrick Lisburn Newtownards	5	John Malloy Norman McCorry Philip Rossitor Robert Campbell Martin Philips	+44 28 9046 1911 +44 28 9332 9696 +44 28 4461 6943 +44 28 9260 4003 +44 28 9181 8227
Rugs Etc	Belfast (4) Newtownards Newtownabbey Londonderry	7	Sam McClean Paul McGowan	+44 28 9024 6812
Ryan Carpets	Londonderry	1	Jim Ryan – Carpets Mura Villa – Furnishings	+44 28 7126 3775
Tamlaght Interiors	Omagh	1	Damien Duddy	+44 28 8224 2954
The Lighthouse Collection	Hillsborough	1	Julie Elliot	+44 28 9268 8188
The Natural Interior	Belfast	1	Paul McCoy	+44 28 9024 2656
The Skip	Newtownards	2	Kenneth Holliwell	+44 28 9181 7955
The Spinning Wheel	Belfast Newtownabbey Hillsborough	3	Harold Curran Linda Kenney	+44 28 9032 6111
Tom Caldwell Galleries	Belfast	1	Chris Caldwell	+44 28 9032 3226
Walker & Co	Banbridge	1	John & Harry Walker	+44 28 4066 2610
Wellington Furnishings	Cullybackey	1	Tom Laverty	+44 28 2588 1444

Republic of Ireland Retailers

Absolute Interiors	Blackrock	1	Marian Dalton	+353 1 295 2233
After Dark	Cork	2	Joan Fitzgerald – Lighting	+353 2 127 6422
Alan Humphrey	Co Tipperary	1	Alan Humphrey	+353 67 41466
Albany Home Décor	Throughout Ireland	27	Fergal Wall – Soft furnishings Tom Gosling – Lighting	+353 502 61616 +353 42 933 6912
Applegates One Stop Design Shop	Cork City	1	John Kelly	+353 21 274515
Atlantic Homecare	Dublin (5) Cork (2) Galway (1)	8	Muriel Quinn – Housewares	+353 1 295 0252
Ballinrobe Furniture & Carpet Centre	Co Mayo	1	Mr McDonagh	+353 92 41877
Bargin City Carpets & Furniture	Kilkenny	1	Peter McCartney	+353 56 51388
Brian S Nolan Ltd	Dun Laoghaire	1	Brian & Finola Nolan	+353 1 280 0564
Bridgets	Charleville	2	Bridget Reidy	+353 63 81390
Burren Cushions	Carrickmacross	1	Pat Conlon	+353 42 966 4566
Carpet Mills Ltd	Dublin	1	Gerry Mooney J Eustace	+353 1 453 6622
Carpet Showrooms	Dublin	4	Chris Bradley	+353 1 295 0055
Caseys	Cork	1	Peter Casey	+353 21 270393
Catherine Thornhill	Skibbareen	1	Catherine Thornhill	+353 28 23027
Dekor Distribution Ltd (Wholesaler)	Dublin	1	Eamonn Dempsey	+353 1 451 5644
Falk's Lighting Ltd	Dublin (2) Limerick	3	Kevin Mooney	+353 1 490 4813
Finishing Touches	Naas	2	David & Mary Fielding	+353 45 879 370
Hickeys	Dublin	12	Ian Donnely	+353 1 677 8361
Hogan's Lighting	Kilkenny	1	Margo Hart	+353 56 21317
In Store	Galway Limerick	2	Oliver/John Mahoney	+353 91 771636
Key Properties	Bantry, Cork	1	David O'Sullivan	+353 27 50111
Lighting World	Dublin	1	David Gibson	+353 1 671 7788
National Lighting Showrooms	Dublin	3	Catherine McBride	+353 1 676 9555
Nicholls	Dublin	6	Mr Fisher	+353 1 462 7179

Peter Linden	Co Dublin	1	Peter Linden	+353 1 288 5875
Sean Bane Carpets & Flooring	Co Galway	1	Sean Bane	+353 91 847 424
Square Deal	Cork	2	Tara George	+353 21 274045
T C Matthews Carpets	Dublin Co Louth	4	Peter Dixon	+353 1 450 3822
Textile World (not the English Company)	Clondalkin Bray Finglass	3	Pat Smullen	+353 1 457 3153
The Lighthouse	Drogheda Navan	2	Nora Murray Maura Galligan	+353 41 983 6571
Upstairs/ Downstairs	Monaghan	1	Michael McQuaid	+353 47 72244
Wigoders	Throughout Ireland	23	Ray McLoughlin – Housewares	+353 1 450 0888
Woodgrove Furnishings	Tullamore	1	Miriam Browse	+353 50 652 2858
Woodies DIY (Grafton Group)	Dublin	12	Brendan Morris	+353 1 452 1353
Yours Personally	Dun Laoghaire	1	Katrina Furlong	+353 1 2301260

Market Sources

Keynote:	UK Home Furnishings Market Sep 1999
Mintel:	Floorcoverings Retailing 1999
Central Statistics Office:	Import/Export statistics
ABT/IDB/IFI:	1995 Market Opportunities
Miller Freeman Publishing:	Cabinet Maker Supplements
	1999/2000 and Housewares Magazine Tel: 0044 1732 377302
NI Family Expenditure Survey 1995-99:	Ireland Household Expenditure Report 1994/5
Enterprise Ireland/LEDU/IDB:	Business Libraries
PricewaterhouseCoopers:	European Economic Outlook January 2000 Retail Development Survey February 1997
ICATA:	Irish Clothing and Textiles Alliance
British Hardware and Housewares Manufacturers Association:	Tel: 0044 1604 622023
The Lighting Association:	Tel 0044 1952 290905
Housewares Focus:	Tel: 0044 208 6517117
Associated Independent Stores (AIS):	Tel: 0044 121 7112200

Useful Web Sites

Enterprise Ireland:	www.enterprise-ireland.com
Industrial Development Board for Northern Ireland:	www.idbni.co.uk
LEDU:	www.ledu-ni.gov.uk
Central Statistics Office:	www.cso.ie
PricewaterhouseCoopers:	www.pwcglobal.com
Northern Ireland Statistics And Research Agency:	www.nisra.gov.uk
British Apparel and Textile Confederation:	www.batc.co.uk
ICATA, Irish Clothing and Textile Alliance:	website under development
IBEC, Irish Business and Employers Confederation:	www.ibec.ie
Yellow Pages (NI):	www.eyp.co.uk
Golden Pages (ROI):	www.goldenpages.ie
Miller Freeman:	www.mfi.com
E-tailers:	www.linens-online.co.uk www.letsbuyit.com www.mfi.co.uk/mfihomeworks www.habitat.net
Mail-order companies:	www.argos.co.uk www.mccord.uk.com www.kaysnet.com www.oceancatalogue.com

InterTradeIreland
TRADE & BUSINESS DEVELOPMENT BODY

InterTrade Ireland – Trade & Business Development Body is committed to enhancing the economies of the island of Ireland through facilitating cross-border and all-island programmes in partnership with key agencies and the business sector at all levels.

ENTERPRISE IRELAND

Enterprise Ireland (EI) is the Government organisation with responsibility for supporting the growth of the competitiveness, sales, exports and employment of local industry in the Republic of Ireland.

IDB Northern Ireland

The Industrial Development Board for Northern Ireland (IDB) is responsible for stimulating growth within companies in Northern Ireland and attracting overseas investment.

LEDU
THE SMALL BUSINESS AGENCY FOR NORTHERN IRELAND

LEDU, the Small Business Agency for Northern Ireland, supports local economic development and promotes the establishment and expansion of small local enterprises, primarily in the manufacturing and tradeable services sectors, whose employment is generally less than 50.

InterTradeIreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU would like to thank all those buyers, distributors and industry experts who contributed their time and expertise during the course of this study. It was most appreciated.

Report Series
This market profile is accompanied by a number of similar reports giving an all Ireland retail perspective on a range of consumer product areas.

The sectors covered are
1 Domestic Furniture
2 Contract Office Furniture
3 Hotel Furniture
4 Contract Fitted Furniture
5 Housewares and Soft Furnishings
6 Giftware and Jewellery
7 Clothing and Footwear
8 Small Kitchen Appliances (2001 Release)

An additional document giving an all Ireland analysis of retail trends entitled "Ireland, A £20 billion+ Retail Market" is also part of the series.

Note
This report was researched for InterTradeIreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU by PricewaterhouseCoopers, Belfast. While every effort has been made to ensure the accuracy of information provided in this report, neither PricewaterhouseCoopers nor InterTradeIreland, EI/IDB/LEDU can accept responsibility for possible errors or omissions.

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