Soft Furnishing & Household Textiles Market
Research & Analysis
UK 2012

Report Sample

Domestic & Non-Domestic Soft Furnishing & Household Textile Market Size & Industry Review 2006-2012; SWOT & PEST Analysis, Product Mix & Key Trends 2006-2016; Soft Furnishing & Textile Manufacturers, Soft Furnishing Retailers Profiles & Key Financials; Market Forecasts to 2016

1st Edition

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Research & Analysis Report Contents

Market Report Tables & Charts

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This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

Companies Included

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this Research & Analysis Report

MTW's *"Research & Analysis"* market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product & distribution channel mix, SWOT, key trends, end use sector mix & trends, key market influences and future prospects for the market. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on statistically relevant company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets. This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. Based on quantitative data as well as the usual qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer greater confidence in our forecasts as well as key trends and influences from a qualitative perspective.

- **Product Mix – Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Distribution Channel & End Use Sector Mix – Current & Future**

This report analyses the key distribution channels for this market and provides historical, current and forecast market share estimates alongside qualitative discussion on key trends for each channel in the industry. Domestic and non-domestic shares are also provided for 2006, 2012 and 2016.

- **Industry Structure Analysis**

The report identifies the key characteristics of the industry, analysed by turnover bands, credit rating, performance over the last 12 months, age of companies, employee bands and geographical share by UK region. This analysis enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. Based on statistically valid research, the reader is able to undertake strategic decisions with confidence and base marketing strategies on solid intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers & competitors, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover & profit estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page company profile including contact details for developing fast sales leads; 4 years of the most recent key financial indicators and MTW's *'at a glance'* chart, enabling the reader to quickly gauge the current and historical financial health of a competitor or potential client.

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. Soft Furnishing & Household Textile Market 2012-2016

2.1 Soft Furnishing & Household Textiles Market Definition

The UK Soft Furnishing & Household Textiles Market is defined as consisting of a wide range of products for use within **domestic** and **non-domestic** end use sectors. This report defines soft furnishings and household textiles as follows and includes a market sizes from 2006-2016 and product mix for each of the following key sectors:-

- **Kitchen & Dining Textiles** –including table cloths, table runners, tea towels, aprons, oven gloves, fabric placemats, napkins.
- **Bedding & Bedroom Textiles** – including duvet covers, sheets, divan trims & valances, anti-mite/anti allergy covers, blankets & wearable blankets, bedspreads/runners & throws, pillowcases, mattress toppers, mattress protectors.
- **Bathroom Textiles** – including bath / hand towels, beach/novelty towels, bath mats, pedestal mats, shower cutains.
- **Pillows, Duvets & Cushions** – including duvets, pillows, interior cushions & seat pads, exterior cushions and seat pads, bedroom cushions
- **Childrens & Nursery Textiles** – including children's bedlinen, children's kitchen textiles, children's bathroom textiles.

All prices in this report are measured at manufacturers selling prices (msp) excluding any value added, import or other taxes and delivery charges. The market definition specifically excludes sales of furniture and window coverings (which are covered in a separate report) but does include 'OEM products' such as cushions etc which are supplied as part of furniture package for example. The report focuses only on new products supplied for use within domestic and non-domestic sectors in the United Kingdom. End use sector shares for 2006, 2012 and 2016 for the market include:-

- **Domestic Consumer Applications** –for use in UK domestic households
- **Non-Domestic Applications** - hotels, leisure, commercial, industrial etc)

The report also segments the market by distribution channel and provides a mix by value between 2006 and 2016 for the following key routes to market:-

- **Soft Furnishing & Homeware Retailers**
- **Supermarkets, Department Stores & High Street Retailers**
- **Internet, Catalogue Stores, Mail Order**
- **Non-Domestic Distribution, Direct & Wholesalers**
- **DIY Multiples & Hardware Stores**
- **Furniture Retailers & Other Stores**

The methodology for this report is based on the last 4 years of financial data from more than 70% of the soft furnishing retailer & UK manufacturing industry by value, coupled with a wide range of additional sources from soft furnishing & textile manufacturers & distributors, trade associations, company websites, Companies House, various HM Government departments, HM Customs & Excise, trade journals, credit reference agencies, industry commentators and our own experience of researching this market for more than a decade.

2.2 Soft Furnishing & Textiles Market Executive Summary

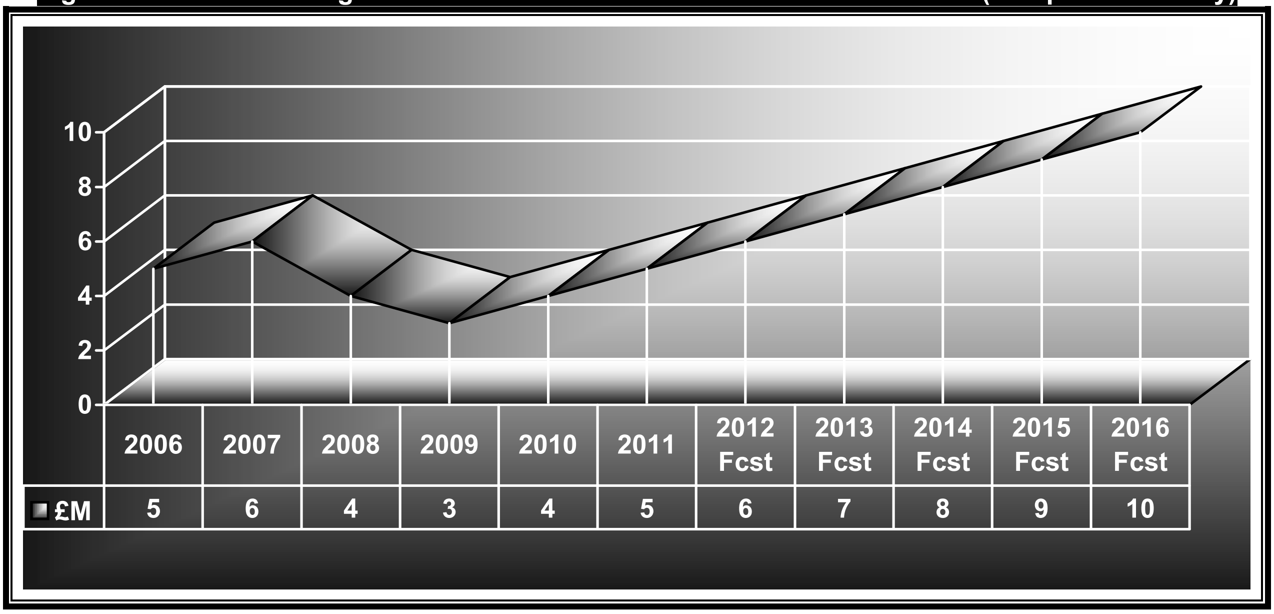
In April 2012, Government statistics reported that the UK economy had slipped back into recession in H1 2012. Whilst the household textiles and soft furnishings market continues to experience a

2.3 Soft Furnishing & Household Textiles Market by Value 2012-2016

2.3.1 Household Textiles & Soft Furnishing Market Current Prices 2006-2016

The UK soft furnishing & textiles market encompasses a wide range of products within both the domestic and non-domestic sectors with the market valued at in 2012 at just over £x billion, as illustrated in the following chart:-

Figure 1: Soft Furnishing & Household Textiles Market – UK 2006-2016 £M (Sample Chart Only)



N.b. Market Size Changed for Sample Purposes. Source: MTW Research / Trade Estimates

As illustrated above, the UK soft furnishing and textiles market experienced relatively xxxxxxxxxx xxxxxxxxxx during 2006 and 2007, with sales xxxxxxxby just under x% as xxxxxxx expenditure and xxxxxxx demand from the xxxxxxx and xxxxxxx in particular continued to xxxxxxx growth for the majority of sectors in the industry.

However, in 2008 as xxxxxxxxxxxxxx non-domestic applications, sources indicate that demand for xxxxxxxxxxxxxx soft furnishings and textiles xxxxxxx xxxxxxx rapidly. In addition, xxxxxxx consumer confidence also resulted in a xxxxxxx demand within the domestic sector. As a result, our estimates are that the market experienced a xxxxxxx in sales of just over x% to year-end December 2008. The xxxxxxxxxxxxxx in the consumer sector was more xxxxxxx in 2009, with the xxxxxxx developing into xxxxxxxxxxxxxxxxxxxxx . Whilst consumer confidence xxxxxxx as a result of xxxxxxxxxxxxxxxxxxxxxxxxxxxx leading to a xxxxxxxxxxxxxxxxxxxxxxxxxxxx levels, this was xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx of just over x% as non-domestic demand xxxxxxxxxxxxxx.

Xxxxxxx demand levels xxxxxxx into H1 2010, though some sources indicate that xxxxxxxxxxxxxx remained xxxxxxx within the xxxxxxxxxxxxxx sectors of the xxxxxxx furnishings and household textiles market. Whilst demand from xxxxxxx-xxxxxxx applications remained relatively xxxxxxx, xxxxxxxremained xxxxxxx positive as xxxxxxxxxxxxxxxxxxxxxxxxxxxx take effect. As a result, growth in the xxxxxxxxxxxxxx sector provided some xxxxxxx for the industry xxxxxxx sales xxxxxxx by just under x% to year-end December, 2010.

Howeverxxxxxxxxxxxxxxx is indicated to have increased the appetite for xxxxxxx products which are perceived to offer

2.3.3 Negative Macro & Micro Market Influencers 2006-2016

There are a number of macro and micro market factors which have influenced and are likely to continue to influence market performance, including:-

- Ongoing xxxxxxxxxxxxxx
- Rising level of xxxxxxxxxxxxxx
- Ongoing **resistance** xxxxxxxxxxxxxxxxxxxxx
- Shift in xxxxxxxxxxxxxxxxxxxxx
- **Dominance of** xxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Growing **polarisation of** xxxxxxxxxxxxxxxxxxxxx
- **Lack of** xxxxxxxxxxxxxxxxxxxxx
- **Low** xxxxxxxxxxxxxxxxxxxxx
- **Lack of** xxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Xxxxxxxxxxxxxxxxxxxxxxxxxxx 2008 – 2012
- Xxxxxxxxxxxxxx leisure, hotel and restaurants sector
- Growing preference for xxxxxxxxxxxxxx

Whilst the above list does not represent an exhaustive representation of all the issues impacting on the household textiles and soft furnishings market, but it nevertheless provides an illustration of some of the key market influences which are likely to impact on growth in the near

2.3.4 Positive Macro & Micro Market Influencers 2006-2016

Despite the number of negative factors which are likely to dampen growth in the near term, there are also a number of positive factors which have stimulated some volume growth in the market and which should offer some opportunity for value growth in the medium to longer term. More specifically, these issues include:-

- **Rising** xxxxxxx
- Growing number of xxxxxxxxxxxxxxxxxxxxxxxxxxxx
- **Rising number** of xxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Optimism for **growth in** xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
- **Static** xxxxxxxxxxxxxxxxxxxxx
- Forecasts of xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Growing levels of xxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Return xxxxxxxxxxxxxxxxxxxxxxxxxxxx

- Moderate **growth in** xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
- Growing focus on xxxxxxxxxxxxxxxxxxxxxx
- Xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx offering enhanced features & added value opportunities
- Optimism for further growth in xxxxxxxxxxxxxxxxxxxxxxxxxxxxx sector
- **Market development** opportunities in terms of xxxxxxxxxxxxxxxxxxxxxx
- Focus on xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx sectors
- Growing **preference** xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx for example.
- Xxxxxxxxxxxxxxxxxxxxxx likely to outperform the overall market
- Return to growth in xxxxxxxxxxxxxxxxxxxxxxxxxxxxx sector
- Increasing levels of xxxxxxxxxxxxxxxxxxxxxx enhancing opportunities for xxxxxxx growth of textiles and soft furnishings.
- Growth in xxxxxxx market as xxxxxxx activity xxxxxxx.

Whilst the above list is not exhaustive, it does nevertheless represent some of the key positive factors which should offer some opportunity for both value and volume growth in the medium to longer term.

As has previously been discussed, the market has been primarily reliant on the

2.4 Soft Furnishing & Textile Share by Domestic & Non-Domestic 2006, 2012 & 2016

The soft furnishing & textiles market can be further segmented into 2 distinct categories which are referred to in the report as 'domestic' and 'non-domestic'. The definitions of these 2 categories are more specifically defined as follows:-

- **Domestic Soft Furnishing & Textiles** – products which are designed, manufactured and sold primarily through retail distribution channels for application in a domestic homes.

- **Non Domestic Soft Furnishing & Textiles** – products designed for application in myriad sectors other than domestic homes. Included with in this sector are hotels, restaurants, leisure facilities, offices and other commercial applications as well as industrial, public sector, education and health.

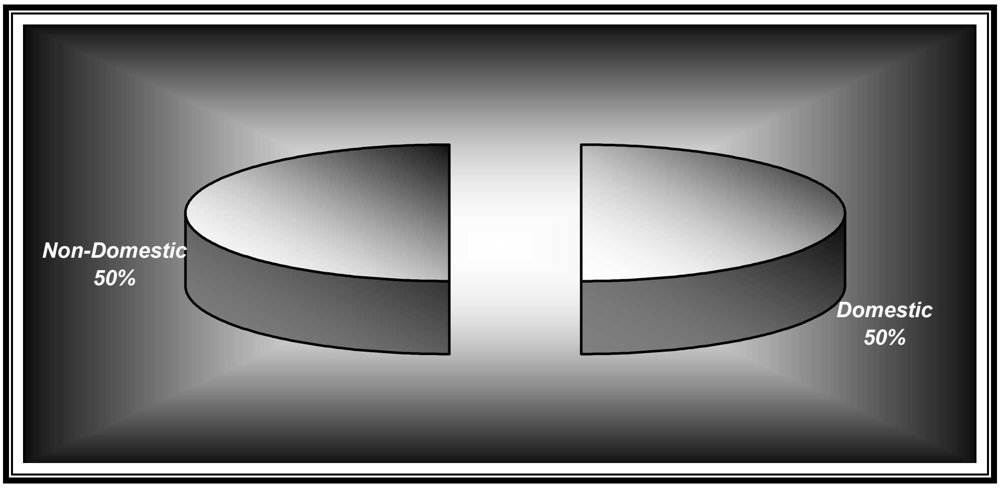
In 2012 and our estimates are that non-domestic applications currently accounts for approximately 30% of the soft furnishings and household textiles market, reflecting sales of around £550 million.

In order to provide an historical context, the following chart illustrates our estimates of the share accounted for by domestic and non-domestic applications in 2006:-

2.4.1 Domestic & Non-Domestic Shares 2006, 2012 & 2016

The following chart illustrates our estimates of the mix **by value** between domestic and non-domestic applications in 2006:-

Figure 3: Volume Share by Domestic & Non-Domestic Soft Furnishing & Textiles 2006

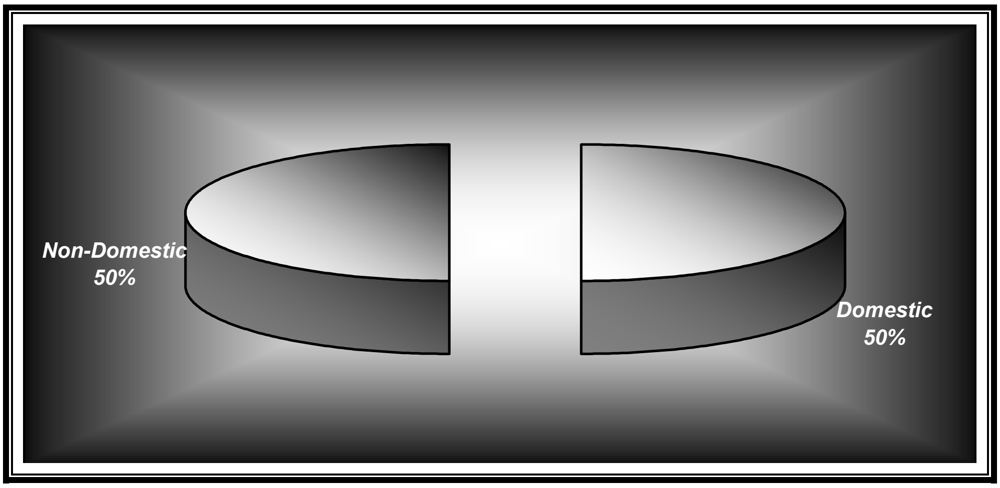


Figures Changed in Sample. Source: MTW Research / Trade Sources

As illustrated, xxxxx applications are estimated to have accounted for the majority share in 2006, with sales of just over £x billion. Following the rapid decline in xxxxx xxxxx during xxxxx and xxxxx indications are that the xxxxx - xxxxx sector has lost share in recent years. This contraction in share loss xxxxx primarily due to the rapid growth in xxxxx xxxxx, followed by a decline in volume terms in a xxxxx xxxxx. Whilst public sector expenditure on xxxxx xxxxx xxxxx sector to some extent, the rapid xxxxx in demand from other commercial applications resulted in xxxxx xxxxx during the last six years.

The following chart illustrates our estimates of the mix by domestic and non-domestic applications in 2012:

Figure 4: Volume Share by Domestic & Non-Domestic Soft Furnishing & Textiles 2012



Figures Changed in Sample: Source: MTW Research / Trade Sources

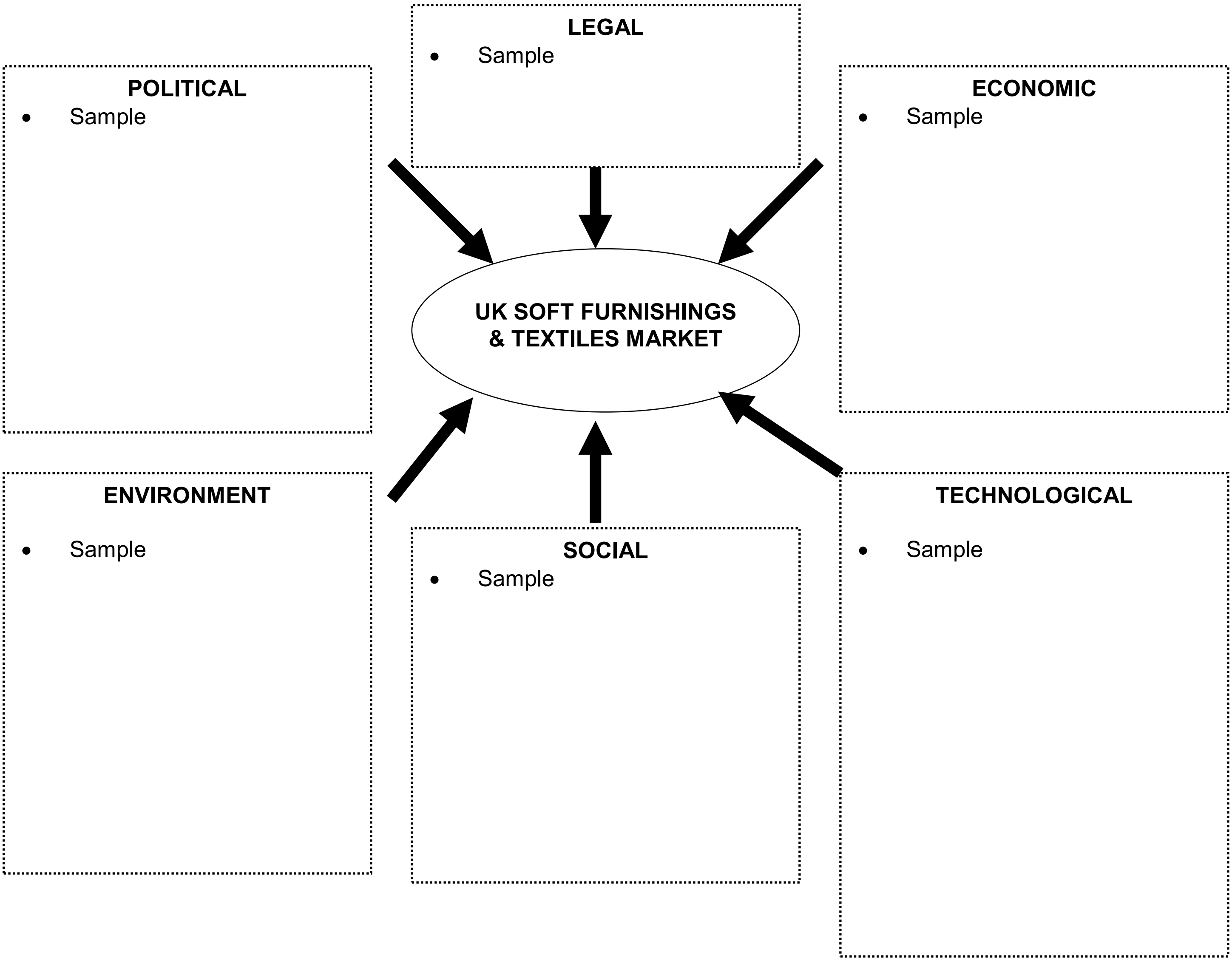
As illustrated, in a 2012 non-domestic soft furnishing & textiles accounted for around x% of the total market, reflecting sales of around £xxx million. Sources indicate that the emphasis

2.5 Soft Furnishing & Textiles Key Market Influences

2.5.1 PEST Analysis – Illustration of Key Market Influences on Textiles & Soft Furnishings

There are a large number of macro market issues and trends which directly or indirectly influence the UK soft furnishing & textiles market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 6: PEST Analysis for UK Soft Furnishing & Textiles Market in 2012



Source: MTW Research Strategic Review 2012

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.5.2 SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the UK soft furnishings & textiles market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

Figure 7: Key Strengths & Weaknesses in the Soft Furnishing & Textiles Market 2012-2016

STRENGTHS	WEAKNESSES
• Inherent industry •	• More than •

Source: MTW Research Strategic Review 2012

Key opportunities and threats evident in the market at present include:-

Figure 8: Key Opportunities & Threats in the Soft Furnishing & Textile Market 2012-2016

OPPORTUNITIES	THREATS
• Develop closer •	• Consolidated •

Source: MTW Research Strategic Review 2012

3.4 Bathroom Textiles Market Size, Product Mix & Imports 2006-2016

3.4.1 Bathroom Textiles Market Value 2006-2016 £M

The following chart illustrates our estimates of the UK bathroom textiles market by value since 2006, with forecasts to 2016:-

Figure 29: UK Bathroom Textiles Market By Value 2006-2016 £M

Sample

Source: MTW Research / Trade Estimates

The UK bathroom textiles market comprises of a range of products including towels, mats and shower curtains. To year end December 2012, our estimates are for sales in this sector to be worth approximately £xxx million at manufacturers selling prices, reflecting an increase of just under x%.

Sales of bathroom textiles are estimated to have xxxxx by around x%, trade sources indicate that volume sales

3.4.2 Share by Key Product in Bathroom Textiles Market 2006, 2012 & 2016

The following chart illustrates the mix of products within the bathroom textiles market in 2012 by value:-

Figure 30: Product Mix in Bathroom Textiles Market by Value 2012

Sample

Source: MTW Research / Trade Sources

As illustrated above, the bath and hand towels, sheets and flannels sector is currently estimated to account for

In order to provide an historical context, the following chart illustrates the share accounted for by key products within the bathroom textiles market in 2006:-

Figure 31: Product Mix in Bathroom Textiles Market by Value 2006

Sample

Source: MTW Research / Trade Sources

The previous chart illustrates that the bath and hand towels sector has xxxxx some slight share in recent years, with sales of these products accounting for xx% of the market in 2006, reflecting a value of approximately £xx million. Between 2006 and 2012 our estimates are that this sector's sales have xxxxx by around x%.

The shower curtains sector is estimated to

3.4.3 Imports Value of Bathroom Textiles 2006-2016 £M

The following chart illustrates our estimates of the level of imports in the UK bathroom textiles market by value since 2006, with forecasts to 2016:-

Figure 33: Imports of UK Bathroom Textiles 2006-2016 £M

Sample

Source: MTW Research / Trade Estimates

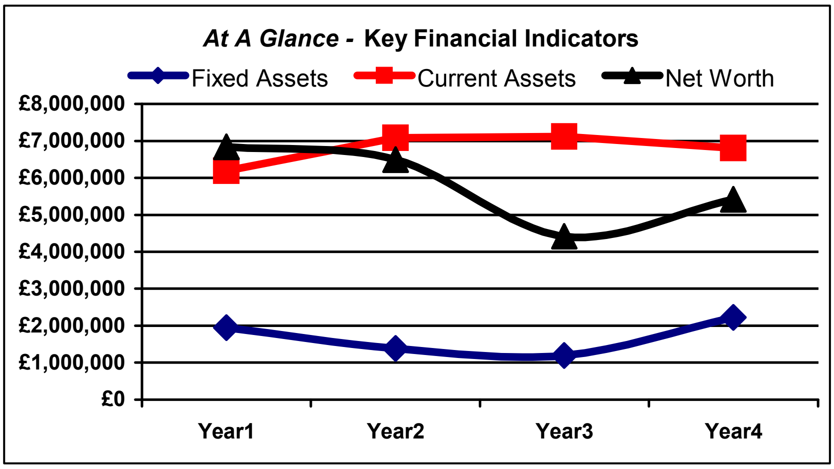
Imports of bathroom textiles are currently estimated to be worth around £xxx million in 2012, reflecting an increase of around x%. Between 2006 and 2012, our estimates are that imports

3. UK Textile & Soft Furnishing Manufacturers Profiles & KPIs

The following section identifies some of the key UK soft furnishing & textile suppliers and provides a 1 page profile with key performance indicators for each. Whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

Sample Ltd - Company Overview & *'At a Glance'*

Sample Address
Sample Address
Sample Address
Postcode
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on March 27, 1922. The company's main activities are recorded by Companies House as "Manufacturers and merchants of cloth, textile products and games equipment." In 2012, the company has an estimated 180-190 employees.

To year end December 2011, Sample Ltd is estimated to have achieved a turnover of around £13.5 million. Pre-tax profit for the same period is estimated at around £0.3 million. The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Manufacturers and merchants of cloth, textile products and games equipment.
Parent Company	Sample HOLDINGS LIMITED
Ultimate Holding Company	Sample HOLDINGS LIMITED
Estimated Number of Employees	180-190
Senior Decision Maker / Director	Adam, Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31-Mar-11

Key Indicator £	Year End 31-Mar-08 (Year1)	Year End 31-Mar-09 (Year2)	Year End 31-Mar-10 (Year3)	Year End 31-Mar-11 (Year4)
Fixed Assets	£1,943,601	£1,386,880	£1,189,732	£2,224,529
Current Assets	£6,191,270	£7,079,527	£7,118,721	£6,803,462
Current Liabilities	£1,293,381	£1,969,222	£3,890,883	£3,579,724
Long Term Liabilities	£0	£0	£0	£0
Net Worth	£6,841,490	£6,497,185	£4,417,570	£5,424,267
Working Capital	£4,897,889	£5,110,305	£3,227,838	£3,223,738
Profit per Employee	£2,562	£5,097	£2,436	£1,605
Sales per Employee	£60,521	£79,865	£77,919	£72,547

4. DISTRIBUTION CHANNEL SHARE 2006-2016

5.1 Share by Key Distribution Channel 2006-2012 for Textiles & Soft Furnishing

The UK textiles and soft furnishing market is comprised of a number of key routes to market, with the majority of sectors focused on the domestic market. More specifically, the key distribution channels quantified in this report include:-

- **Soft Furnishings, Textiles & Homeware Retailers**
- **Supermarkets, Department Stores & High Street**
- **Internet, Mail Order, Direct, Catalogue Stores**
- **Non-Domestic Distribution (Wholesale, Direct etc)**
- **DIY Multiples, Hardware Stores**
- **Furniture Retailers & Others**

Whilst the above is not necessarily an exhaustive list, it nevertheless highlights the key routes to market utilised by the soft furnishings and textiles industry in 2012. The following sections illustrate our estimates of the share for the above key routes to market in 2006, 2012 with forecasts to 2016.

5.1.1 Share By Key Distribution Channel For Textiles & Soft Furnishings 2012

The following chart illustrates our estimates of the share by key route to market in 2012:-

Figure 107: Distribution Channel Share for Textiles & Soft Furnishings 2012

Source: MTW Research / Trade Sources

As illustrated above,

5.1.2 Share By Key Distribution Channel For Textiles & Soft Furnishings 2006

In order to provide an historical context, the following chart illustrates our estimates of the share by key route to market in 2006:-

Figure 108: Distribution Channel Share for Textiles & Soft Furnishings 2006

Source: MTW Research / Trade Sources

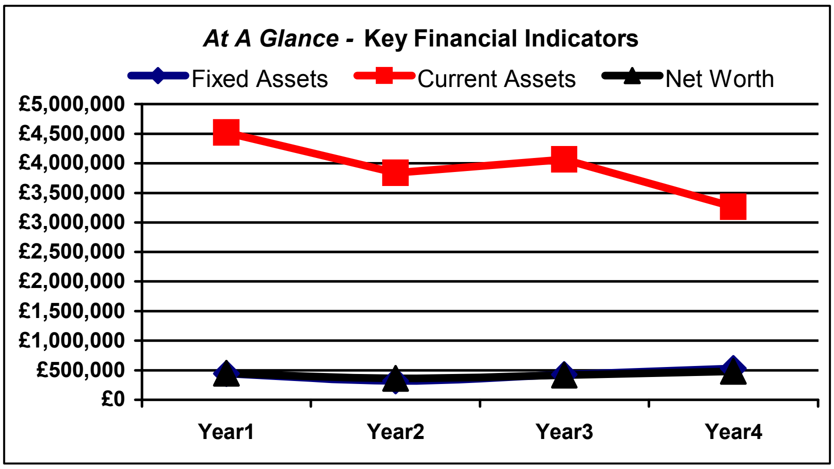
As the above chart illustrates, there has been some

5. Textile & Soft Furnishing Retailers Profiles & KPIs

The following section identifies some of the key UK soft furnishing & textile retailers and provides a 1 page profile with key performance indicators for each. Whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

Sample Ltd - Company Overview & *'At a Glance'*

Sample Street
Sample Town
Sample County
Postcode
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on April 1, 1933. The company's main activities are recorded by Companies House as "Retail sales of dress and furnishing fabrics together with associated items and related income." In 2012, the company has an estimated 440-450 employees.

To year end December 2011, Sample Ltd is estimated to have achieved a turnover of around £15.2million. Pre-tax profit for the same period is estimated at around £0.50 million. The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Retail sales of dress and furnishing fabrics together with associated items and related income.
Parent Company	Sample LIMITED
Ultimate Holding Company	Sample LIMITED
Estimated Number of Employees	440-450
Senior Decision Maker / Director	Dennis, Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 30-Apr-11

Key Indicator £	Year End 30-Apr-08 (Year1)	Year End 29-Apr-09 (Year2)	Year End 30-Apr-10 (Year3)	Year End 30-Apr-11 (Year4)
Fixed Assets	£444,255	£316,460	£424,393	£528,993
Current Assets	£4,520,694	£3,840,339	£4,064,181	£3,263,656
Current Liabilities	£3,574,156	£2,988,702	£3,362,760	£2,691,065
Long Term Liabilities	£939,863	£806,780	£708,255	£618,692
Net Worth	£450,930	£361,317	£417,559	£482,892
Working Capital	£946,538	£851,637	£701,421	£572,591
Profit per Employee	£1,207	£989	£1,291	£1,114
Sales per Employee	£34,357	£35,337	£34,760	£33,963

7. TEXTILES & SOFT FURNISHING CHANNEL STRUCTURE

7.1 Soft Furnishing & Textile Retailers Channel – Industry Structure

The following section reviews the soft furnishing & textile retailers channel in 2012 in terms of industry structure based on industry financial sales data and provides key performance indicators for the UK soft furnishing & textile retailers channel.

7.1.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 178: Market Share by Soft Furnishing & Textile Retailers Sales Growth / Decline 2011-2012

Sample

Source: MTW Research / Company Accounts

According to industry sales, 34% of soft furnishing & textile retailers have experienced

7.3 Soft Furnishing & Textile Manufacturers Ranking & Turnover Estimates

7.3.1 Soft Furnishing & Textile Manufacturers Listing

The following identifies key market players active at present:-

Figure 192: Soft Furnishing & Textile Manufacturers Company Listing

A.W.Hainsworth & Sons Ltd
Acton & Acton Ltd
Ambassador Textiles Ltd
Aqualona Products Ltd
Ashley Wilde Group Ltd
Bedeck Ltd
Biggie Best Ltd
Breasley Pillows Ltd
Bursali Towels (UK) Ltd
Caldeira Ltd
Character World Ltd
Chortex Holdings Ltd
Christy Home Textiles Ltd
Coats Plc
Comfy Quilts Ltd
Countryside Art Ltd
Decotex Ltd
Delbanco Meyer & Company Ltd
Devon Duvets Ltd
Duvet Pillow & Linen Co. Ltd
Elite Bedding Company Ltd
Empress Quilts & Textiles Ltd
Euroquilt Ltd
Fogarty (Filled Products) Ltd
Fuda International Trading Company Ltd
Futon Ltd
G.J.T. Ltd
H.Fine & Son Ltd
Herbert Parkinson Ltd
Hilding Anders UK Plc
John Cotton Group Ltd
John Horsfall & Sons Ltd
Kipfold (Holdings) Ltd.
Laura Ashley Holdings Plc
Liddell Ltd
Melrose Textile Co.,Ltd
Milliken Industrials Ltd
Norfolk Feather Company Ltd
Northern Feather (Home Furnishings) Ltd
Phoenox Textiles Ltd
Platt And Hill Ltd
Portmeirion Group Public Ltd
Rectella Ltd
Redwood Distribution Ltd
Robert Scott & Sons Ltd
Ruia Group Ltd
Sartex Quilts & Textiles Ltd
Snug Company Ltd
Stockbridge Mill Company Ltd
Stuart Morris Textiles Ltd
Supreme Quilting Company Ltd
Texplan Manufacturing Ltd
Textile Concepts Ltd
The French Linen Company Ltd
The Lace Tablecloth Company Ltd
The Surrey Down Company Ltd
Thomas Frederick & Company Ltd
Tonrose Ltd
Trendsetter Home Furnishings Ltd
United Fillings Ltd
Walker Greenbank Plc.
Whites Of London Ltd
Zap Ltd

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio. Whilst we endeavour to include all relevant companies, there may be some that are not included in this list for a number of reasons and as such the following should not be regarded as an exhaustive directory of UK soft furnishing & textile manufacturers.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry. Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report may contain an element of estimation.

7.3.2 Soft Furnishing & Textile Manufacturers Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 193: Soft Furnishing & Textile Manufacturers Ranked By Turnover 2011

1.Sample	2.Sample

Source: MTW Research / Company Accounts

7.3.3 Soft Furnishing & Textile Manufacturers Turnover Estimates 2011

The following table illustrates the estimated turnover for each company for 2011:-

Figure 194: Soft furnishing & textile Suppliers Sales Estimates 2011 £M

Trading Name	2011 Turnover Estimate £M	Trading Name	2011 Turnover Estimate £M
Sample	£Sample		£7.0
Sample	£Sample		£6.9
Sample	£Sample		£6.0
	£103.0		£6.0
	£69.0		£6.0
	£55.0		£5.9
	£54.0		£5.7
	£48.0		£5.6
	£32.0		£5.5
	£31.0		£4.1
	£24.0		£2.4
	£23.0		£2.0
	£23.0		£1.5
	£22.0		£1.3
	£21.0		£1.3
	£21.0		£1.2
	£21.0		£1.2
	£21.0		£0.9
	£19.0		£0.8
	£18.0		£0.6
	£15.0		£0.6
	£15.0		£0.5
	£13.5		£0.4
	£11.0		£0.3
	£11.0		£0.2
	£10.0		£0.1
	£10.0		£0.1
	£10.0		£0.1
	£9.0		£0.1
	£8.3		£0.1
	£8.0		
	£8.0		

Source: MTW Research / Company Accounts

7.3.4 Soft Furnishing & Textile Manufacturers Ranking by Profitability

The following table illustrates the profit ranking for each company in 2011:-

Figure 195: Soft Furnishing & Textile Manufacturers Ranked By Profit 2011