



Floorcoverings Market
~ Focus on Domestic Applications ~
Research & Analysis
UK 2010

REPORT SAMPLE

UK Floorcoverings Market Size & Trends 2004-2014; Focus on Domestic Market; SWOT & PEST Analysis, Dom & Non-Domestic Floorcoverings Product Mix 2004-2014; Domestic Channel Mix 2004-2014; Manufacturer Profiles & Financials, Retailers Profiles & Key Financials; Market Forecasts & Trends to 2014

August 2010

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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 mix, distribution channel mix, SWOT, key trends and influences, supply and distribution channel trends. 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 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, Ansoff Matrix & 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. As they are based on quantitative data as well as 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 our clients greater confidence in our market forecasts as well as discussing key market 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 Mix – Current & Future**

The report identifies the key distribution channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market 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 in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover 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 profile for each company including full 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 financial health of a company.

- **Relevant Companies, 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. UK FLOORCOVERINGS MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Floorcoverings Market comprises of a range of products suitable for use within domestic and non-domestic environments. Specifically, this report reviews the UK floorcoverings market between 2004 and 2010 with forecasts to 2014 for:-

- **Carpets** – Share for Tufted, Woven, Needlepoint, Knotted etc
- **Laminate / Engineered & Hardwood**
- **Ceramic Floor Tiles**
- **Others – Natural, Stone, Vinyl, Lino, Cork, Rubber etc**

This report also provides market size 2004-2014 for each product sector in:-

- **Domestic Applications and**
- **Non-Domestic Applications**

2004-2014 share by distribution channel in domestic applications is given for:-

- **Floorcoverings Retailers** – Independent & Multiples
- **Installers & Housebuilders**
- **DIY, Hardware & Home Retailers**
- **Builders Merchants**
- **High Street Retailers, Catalogue & Dept Stores**
- **Mail Order, Internet Retailers**

The above definitions exclude rugs, mats, underlay and associated products such as grippers etc. Whilst market size for the non-domestic market is provided and segmented by key product sector, analysis of key market trends, SWOT, PEST, distribution shares and future prospects primarily relate to domestic applications. Labour costs associated with installation are also excluded, with market sizes relating to material costs only, excluding any additional sales taxes (e.g VAT). Market sizes throughout the report are provided at manufacturers selling prices (MSP).

The methodology for this report is comprehensively wide ranging and encompasses both qualitative input and quantitative sales statistics. Sources for this report include primary financial data & secondary comment & input from manufacturers, retailers, distributors, UK Government, HM Customs, credit checking companies, Companies House, numerous trade journals & publications & our own experience of researching this market for more than a decade. This report is unique in its combination of both quantitative sales data combined with qualitative research comment & analysis and provides the reader with a high level of confidence in its findings.

The UK floorcoverings market is currently valued at £xxx billion at manufacturers selling prices in 2010, with indications now suggesting that the majority of sectors in the market xxx xxx xxx in mid 2010 as the economy slowly returns to growth and both consumer and business confidence is returning.

Carpets xxx xxx xxx the UK floorcoverings market in 2010, with sales forecast to reach around £ xxx by the end of 2010, reflecting a share of some xxx %. The laminate and engineered hardwood floorcoverings market is currently estimated to account for around xxx % of the market in 2010, reflecting sales of just under £ xxx million at manufacturers selling prices.

Accounting for around xxx % of the market in 2010, ceramic tile floorcoverings have xxx xxx in recent years, in line with hard floorcoverings xxx xxx xxx share from the xxx xxx sector. Sales of ceramic floor tiles are estimated to reach just over £ xxx million by year-end December 2010. The 'others' sector mainly comprises of natural stone floorcoverings such as slate, granite etc, cork and vinyl, with sales of these products estimated to reach just over £ xxx million in 2010, reflecting around xxx % share of the UK floorcoverings market.

In 2010 domestic applications currently account for around xxx % of the total floorcoverings market, reflecting a value of some £ xxx billion at manufacturers selling prices. Sources indicate that xxx xxx xxx and market xxx xxx has provided a xxx xxx xxx for the domestic floorcoverings sector in recent years, with the majority of product sectors having xxx xxx xxx in value terms.

The domestic floorcoverings market was particularly affected by xxx xxx xxx xxx as householders sought to xxx xxx xxx xxx xxx xxx xxx. The xxx xxx xxx xxx xxx xxx xxx xxx the third quarter of 2009, xxx xxx trade sources indicate that xxx xxx xxx xxx Q4 2009 prompted xxx xxx xxx xxx xxx the market, with, xxx xxx xxx xxx xxx in market value xxx xxx xxx xxx xxx evident. xxx xxx xxx xxx xxx xxx xxx xxx trading conditions during Q4 xxx resulted in the year closing an estimated xxx % xxx on the xxx market value.

Our estimates are that the recession may have cost the domestic floorcoverings industry in the region of £ xxx million of lost sales and potential growth relating to this sector specifically, reflecting a cost of around £ xxx million per month to the industry since the beginning of xxx. The level of business xxx in both the manufacturing and distribution sectors of the floorcoverings market have continued to xxx in recent months, with the effects of the economic downturn xxx xxx xxx xxx xxx xxx the industry for xxx years.

Key regions for domestic floorcoverings include xxx xxx xxx and the xxx xxx, accounting for around 16%, 15% and 14% respectively of English floorcoverings sales. Regions with a relatively small share of the market include the North xxx at 5% and xxx at 9%.

The UK domestic carpets market is currently valued at just over £xxx million in 2010, with the majority of sources now indicating that the sector has xxx xxx xxx xxx to xxx xxx xxx, or xxx xxx xxx xxx, following a period of xxx xxx xxx during xxx xxx xxx and xxx.

The laminate and wood floorcoverings market is currently valued at just under £ xxx million in 2014, reflecting a xxx xxx xxx xxx xxx. Between 2004 and 2007, the market experienced xxx xxx xxx xxx both in volume and value terms, rising by just under xxx % over the period as consumers embraced the xxx xxx xxx xxx xxx xxx in particular.

Sales of ceramic floor tiles experienced xxx performance in terms of value and volume between xxx and xxx, xxx by some xxx % over the period with sales rising by some £ xxx million. The subsequent recession resulted in a rapid xxx xxx xxx xxx across all sectors of the domestic market, with sales xxx xxx by xxx % and xxx % in 2008 and 2009 respectively.

The floorcoverings market remains dominated by xxx xxx xxx retailers operating on xxx xxx xxx basis with a xxx xxx xxx of brands stocked. This sector generally operates within xxx end of the market, having mostly xxx over the last 8-10 years. The second largest sector is accounted for by xxx xxx retailers, with xxx xxx xxx xxx having rapidly gained share in a number of sectors of the UK floorcoverings market in recent years, most notably in the xxx xxx sector. In 2010, this sector accounts for around xxx % of the market by value.

Near term prospects for the domestic floorcoverings industry are for a xxx in market value forecast for 2010 of around xxx % by value. In terms of macro-economic issues, the economy should continue a track of a more xxx xxx in H2 2010. This, coupled with an xxx xxx and xxx xxx xxx xxx should xxx xxx xxx xxx xxx for the floorcoverings market in the near term.

Forecasts for the overall domestic & non-domestic floorcoverings market are xxx during 2011, with xxx forecast at around xxx %. This is likely to reflect a xxx in constant prices as CPI (consumer price inflation) is expected to remain well above the current target of 2% in 2011. Nevertheless, this scenario does reflect a substantial improvement on the xxx experienced during xxx. In the medium term, our forecasts are for the sector to xxx xxx xxx xxx xxx by the end of 2014.

2.2 DOMESTIC & NON DOMESTIC FLOORCOVERINGS MARKET SIZE 2004-2014

2.2.1 Domestic & Non-Dom Floorcoverings Market Size 2004-2013 – Current Prices

The total UK floorcoverings market, comprising both domestic and non-domestic applications is estimated to be worth just under £ xxx billion in 2010 as illustrated in the following chart:-

Figure 1: Domestic & Non-Domestic Floorcoverings Market 2004– 2014 By Value £m

Source: MTW Research / Trade Estimates

The UK floorcoverings market is currently valued at £ xxx billion at manufacturers selling prices in 2010, with indications now suggesting that the majority of sectors in the market have xxx xxx, following xxx xxx in 2008 and particularly 2009.

Between 2004 and early 2008, the floorcoverings market is indicated to have performed xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx. Substantial investment in manufacturing and distribution has been evident in many key areas of the market in recent years, with continued business confidence leading to higher investment commitments, most notably in the manufacturing sector in terms of premises, manufacturing capabilities, IT systems and distribution.

Following a rise of some xxx % between 2004 and the end of 2007, sources indicate that whilst business and consumer confidence carried through into Q xxx, xxx a growing concern relating to the potential impact of xxx emanating from the xxx was becoming evident. During H2 xxx the market experienced a relatively rapid reversal in fortunes, as business and subsequently consumer confidence xxx xxx xxx xxx xxx xxx xxx. Whilst xxx xxx sectors xxx xxx xxx xxx reasonably immune to the downturn in H1 2009, discretionary spending by consumers on domestic RMI (repair, maintenance & improvement) xxx xxx, with this xxx hastened by the xxx xxx xxx xxx and the xxx xxx xxx xxx xxx xxx markets.

By year end December 2009, the UK floorcoverings market is estimated to have xxx by some xxx %, xxx more than £ xxx million of sales in 1 year – highlighting the xxx xxx in industry value brought about xxx xxx xxx. Sources indicate that trading conditions were xxx xxx xxx xxx xxx xxx in Q3, 2009 with both consumer and business confidence indicated to have xxx xxx during this period.

As the UK xxx to xxx in GDP in late 2009, the market xxx has since xxx, though xxx has been scarce throughout the industry. A xxx xxx xxx in H2 2010 is likely to give way to more robust xxx for floorcoverings in the xxx xxx of the year, though growth forecasts for the year overall remain xxx xxx x% in current price terms.

The government have also now indicated that they expect to

2.2.3 Floorcoverings Market – Share by Product 2004-2014

For the purposes of this report, the UK Floorcoverings market is comprised of the following key product sectors:-

- **Carpets** –Tufted, Woven, Needlepoint, Knotted etc
- **Laminate / Engineered & Hardwood**
- **Ceramic Floor Tiles**
- **Others – Natural, Stone, Vinyl, Lino, Cork, Rubber etc**

The following chart illustrates our estimates of the share by value taken for each of the key product sectors within the overall domestic & non-domestic UK floorcoverings market in 2010:-

Figure 3: Floorcoverings Market Share by Key Product Sector 2010

Source: MTW Research / Trade Estimates

xxxxxxx continue to xxxxxxxx the UK floorcoverings market in 2010, with sales forecast to reach around £ xxxxxxxx by the end of 2010, reflecting a share of some xxxxxxxx %. Whilst this sector has lost some share in recent years, the wide range of products and applications within the xxxxxxxx market is likely to sustain xxxxxxxx. Within the sector, tufted carpets account for xxxxxxxx xxxxxxxx

The laminate and engineered hardwood floorcoverings market is currently estimated to account for around xxxxxxxx % of the market in 2010, reflecting sales of just under £ xxxxxxxx million at manufacturers selling prices.

Accounting for around xxxxxxxx % of the market in 2010, ceramic tile floorcoverings have xxxxxxxx in popularity in recent years, in line with xxxxxxxx xxxxxxxx generally xxxxxxxx share from the xxxxxxxx sector. Sales of ceramic floor tiles are estimated to xxxxxxxx xxxxxxxx just over £ xxxxxxxx million by year-end December 2010.

The 'others' sector mainly comprises of natural stone floorcoverings such as slate, granite etc, cork and vinyl, with sales of these products estimated to reach just over £ xxxxxxxx million in 2010, reflecting around xxxxxxxx share of the UK floorcoverings market.

Natural stone flooring has become

For comparison purposes, the following chart illustrates the share by key product sector in 2004:-

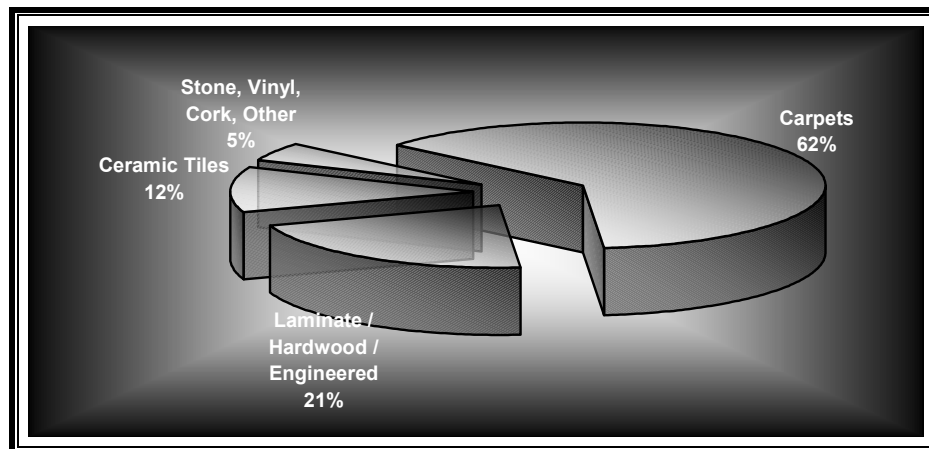
Figure 4: Floorcoverings Market Share by Key Product Sector 2004

Source: MTW Research / Trade Estimates

As illustrated, in

In terms of future prospects, the following chart illustrates our forecasts in terms of key product mix by 2014:-

Figure 5: Floorcoverings Market Share by Key Product Sector 2014



Source: MTW Research / Trade Estimates

By 2014, our forecasts are that

2.2.4 Floorcoverings Market – Share by Domestic & Non-Domestic 2004-2014

The following chart illustrates our estimates of the mix of domestic and non-domestic applications within the floorcoverings market in 2010:-

Figure 6: Share by Domestic & Non-Domestic Applications 2010

Source: MTW Research / Trade Estimates

As the chart illustrates, in 2010 domestic applications currently account for around xxxxxxxx % of the total floorcoverings market, reflecting a value of some £ xxxxxxxx billion at manufacturers selling prices. Sources indicate that

In order to provide a comparison, the following chart illustrates the mix between domestic and non-domestic applications in 2004:-

Figure 7: Floorcoverings Share by Domestic & Non-Domestic Applications 2004

Source: MTW Research / Trade Estimates

As the above chart illustrates, indications are that the non-domestic sector has

The following chart illustrates the likely mix between domestic and non-domestic applications by value by 2014:-

Figure 8: Share by Domestic & Non-Domestic Applications 2014

Source: MTW Research / Trade Estimates

As illustrated, the share between domestic and non-domestic applications is set

2.3 DOMESTIC FLOORCOVERINGS MARKET SIZE & TRENDS 2004-2013

2.3.1 Domestic Floorcoverings Market Size 2004-2013 – Current Prices

The domestic UK floorcoverings market is estimated to be worth just over £ xxxxxxx billion in 2010 as illustrated in the following chart:-

Figure 9: Domestic Floorcoverings Market – UK 2004 – 2014 By Value £m

Source: MTW Research / Trade Estimates

The domestic floorcoverings market xxxxxxx xxxxxxx xxxxxxx xxxxxxx xxxxxxx
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3. FLOORCOVERINGS MANUFACTURER PROFILES

The following section identifies some of the key UK manufacturers & importers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

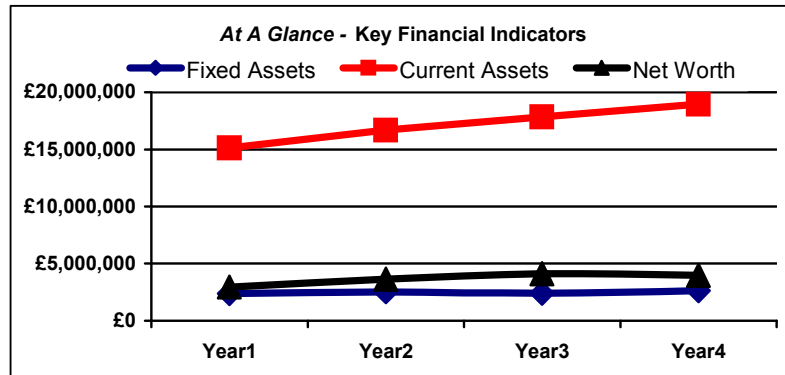
4.1 Floorcoverings Manufacturers Profiles & KPIs

Sample Flooring - Company Overview & 'At a Glance'

Sample Address
Sample Industrial Estate
Sample Town
Sample City
Tel: Sample 246220

Sample Flooring is a private limited with share capital company, incorporated on October 7, 2003. The company's main activities are recorded by Companies House as "A group engaged in the manufacture of tufted and other major types of carpets." In 2010, the company has an estimated 450 employees. To year end

December 2009, Sample Flooring is estimated to have achieved a turnover of around £60 million. Pre-tax profit for the same period is estimated at around £3 million.



The following table briefly provides a top line overview on Sample Flooring:-

Company Name	Sample Flooring
Brief Description of Activities	A group engaged in the manufacture of tufted and other major types of carpets.
Parent Company	na
Ultimate Holding Company	na
Estimated Number of Employees	450
Senior Decision Maker / Director	Sample Matthews

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

Sample Flooring - 4 Year KPIs to Year End 31-Mar-09

Key Indicator £	Year End 31-Mar-06 (Year1)	Year End 31-Mar-07 (Year2)	Year End 31-Mar-08 (Year3)	Year End 31-Mar-09 (Year4)
Fixed Assets	£2,373,000	£2,534,000	£2,400,000	£2,624,000
Current Assets	£15,120,000	£16,687,000	£17,837,000	£18,942,000
Current Liabilities	£14,136,000	£15,220,000	£15,806,000	£16,921,000
Long Term Liabilities	£406,000	£374,000	£308,000	£658,000
Net Worth	£2,951,000	£3,627,000	£4,123,000	£3,987,000
Working Capital	£984,000	£1,467,000	£2,031,000	£2,021,000
Profit per Employee	£6,037	£2,839	£2,145	£233
Sales per Employee	£138,236	£140,768	£130,785	£132,336

4. DISTRIBUTION CHANNELS SHARE & TRENDS

5.1 Share by Key Distribution Channel 2010, 2004 & 2014

The share accounted for by each of the key distribution channels within the UK domestic floorcoverings market in 2010 is illustrated in the following chart:-

Figure 98: Share by Distribution Channel for Domestic Floorcoverings Market 2010

Source: MTW Research / Trade Sources

It should be noted that due to an element of overlap between a number of channels, estimating the share by channel is particularly complex and the above should therefore be regarded as guideline estimates only.

Given these complexities, however, our estimates are that the xxxxxxxxxx continue to maintain the majority share by value of the floorcoverings market in 2010, with this sector comprising of around % of total industry sales. Xxxxxxxx xxxxxxxxxx

In order to provide a historical context, the 2004 share for each of the key channels illustrated in the following chart:-

Figure 99: Share by Distribution Channel for Floorcoverings Market 2004

Source: MTW Research / Trade Sources

As illustrated, there has been

In terms of future prospects, the following chart illustrates the forecast share for each key channel in 2014:-

Figure 100: Share by Distribution Channel for Floorcoverings Market 2014

Source: MTW Research / Trade Sources

Our forecasts suggest that there are likely to be some

5.2 Floorcovering Retailers Market – Industry Structure

The following section reviews the UK floorcovering retail market in 2010 in terms of industry structure and provides key performance indicators for the largest channel of the UK floorcoverings market.

5.2.1 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 101: Market Share by Floorcoverings Retailer Sales Growth / Decline 2009/10

Source: MTW Research / Company Accounts

For the preceding 12 months to June 2010, our estimates suggest that more than xx% of the market experienced growth which could be described as 'rapid', with sales rising by more than 10% per year. Further, around x% of the floorcoverings retail market is estimated to have experienced some sales growth over the last 12 months.

However, whilst the above chart identifies more than x% of the market grew sales over the last 12 months, sources indicate that this reflects a xxxxxxxx

Our estimates suggest that x% of the market reported either static or a contraction in overall sales during the last 12 months to June 2010. Indications are that this sector typically consisted of some larger companies as well as smaller single site retailers, highlighting the difficult trading conditions in the market at present.

5.2.2 Industry Share by Credit Rating in 2010

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by floorcoverings retailers in terms of credit rating in July 2010:-

Figure 102: Market Share by Credit Rating in the Floorcoverings Retail Industry 2010

Credit ratings are a crucial indicator of the financial health of a company and when combined, as in the above chart, provide a graphic illustration of the current financial health of the overall floorcoverings retail market at present.

As illustrated, just over x% of the industry is viewed as having either an 'excellent' or 'good' credit rating, reflecting a xxxxxxxxxxxx in the market in terms of financial standing. The xxxxxxxxxxxx number of companies with xxxxxxxxxxxx credit ratings is in part due to the

However,

5.2.3 Industry Mix by Age of Companies in 2010

The following chart illustrates the share by age of companies within the UK floorcovering retail market as at July 2010:-

Figure 103: Market Share by Company Age in the Floorcovering Retail Market 2010

The floorcoverings retail market is predominated by companies that are more than xxx years old, reflecting an industry

5.4 Floorcoverings Retailers Industry Ranking & Turnover Estimates

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.

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, therefore, that the rankings and other information provided within this report may contain an element of estimation.

5.4.2 Floorcoverings Retailers Ranking By Turnover

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

Figure 116: Floorcoverings Retailers Ranked By Turnover 2009

1.Xrpxrxht Plx	44.Xxvxx Xxrxxn Xrpptx Ltx
2.Xlxxx Xrpptx	45.Huxxxrxxxlx Xrppt Xntrx
3.Txppx Tlxix Plx	46.Lxvnx Xlxxr Ltx
4.Xlxxr Xy Hxxx Lxxxtx (Xlxxr 2 Xx)	47.Nxwxxx Xntrxtx (Xlxxrxn) Ltx
5.Unxtx Xrpptx Xrup PLX	48.Hxlyxxurnx Xlxxrxn Ltx
6.Thx Nxturxl Wxxx Xlxxr Xx Ltx	49.Xrxnxtxwn Xrppt Xntrx Xnx Xxxpxny
7.Xnxwxxvx Xrpptx Ltx	50.Lxyrx
8.Tlxlxlxxr Lxxxtx	51.Xntrxt Xlxxrxn Xpxxxxlxtx
9.Xrkt Xrpptx Ltx	52.Xrxtwxxx
10.Nxrthrn Xlxxrxxt Xtxhxxx Ltx	53.Xrxxwtxr Xlxxrxn Xx Ltx
11.Xkxy Xlxxrxn Lxxxtx	54.Xxxwxy Xlxxrxn Ltx
12.Xxx Hrxwxxx Xlxxrxn Ltx	55.Thx Xrppt Xxtxy
13.Lnxxlnxhxxr Xlxxrxn Xx Ltx	56.Kxvxn Krpptx Lxxxtx
14.Xlxxrxn Xnxutrxxx Ltx	57.Xhxxwll Xrppt Xntrx Ltx
15.Lxxnxtx Xlxxrxn Xrxt (Lx Xrxt)	58.Lxkxn Xrppt & Xlxxrxn Xx Ltx
16.Xtxkprt Xlxxrxn & Xntrxxr Ltx	59.Xxxrxn Xll Ltx
17.Tlx Xuprxtrr	60.XXL Xlxxrxn
18.Xutk Lxxxtx (Wrxlxly Xrpptx)	61.Trxxx Xrpptx (Xxtlxn) Lxxxtx
19.Xlxxwxxx X & J Ltx.	62.X.Xuxy & Xn Lxxxtx
20.Jpxnx'x Ltx	63.Xrxkxn Xlxxr Ltx
21.X.X.X. - Xrppt Wrlx Lxxxtx	64.Xlxxr Xr Lxvnx
22.Prx Xlxxrxn	65.Xnxxpt Xlxxrxn Xx UK Ltx
23.Xx Nxturxlwxxx Ltx	66.Prxtxxl Xlxxrxn
24.Nxturxly Wxxx Ltx	67.Xxxxx Tlx & Xthrxxx Ltx
25.Xlxxrxn Xlxx Ltx	68.Tlx Xx Xxtxntxx
26.Prxlx X X X	69.Wxtxrxxk Xrpptx & Lxxnxtx
27.Thx Wxxxxn Xlxxr Xx	70.Trxnxx Xlxxrxn
28.Xnxhxxx Xrxplxxx Xnx Xlxxrxn	71.Thx Xntrxxr Xrup
29.Hxxxxn Hll Ltx	72.Xhrx Killy
30.Wxxx Xlxxr Xntrx Ltx	73.Xxrn Xrpptx Ltx
31.UK Wxxx Xlxxr Lxxxtx	74.Thx Xlxnxtxn Xlxxrxn Xx Ltx
32.Xlxxrxn Xrxt	75.Xxtxntvx Xlxxr Ltx
33.Xwxr & Xln Ltx	76.Vxttrxx Xrpptx (Xxtlxn) Ltx
34.Xxunty Xrpptx Xrxn Ltx	77.Xxxvr Wxxx Xlxxrxn Ltx
35.X X Xrppt & Xlxxrxn Ltx	78.X W Xlxxrxn Ltx
36.Xluxx Xlxxrxn	79.Xluxx Xlxxrxn
37.Kxptxn Xlxxrxn Ltx	80.J P W (Xlxxrxnx) Ltx
38.Xrxxwll Xrpptx Ltx	81.Nxrthrn Xlxxrxxt (Xlxx) Lxxxtx
39.Xlxvr Xrpptx Lxxxtx (Xkx Xlxxrxn)	82.Qulxty Wxxx Xlxxrxn Xrvxxx Ltx
40.Xylxxxury Xlxxrxn	83.RX Xlxxrxn Ltx
41.X X Xlxxrxn Xntrxtx	84.Twxnty Xnx Twlvx
42.X & J Xrpptx Ltx	
43.Xpxrxl Xrpptx & Xxxx	

Source: MTW Research / Company Accounts

5.4.3 Floorcoverings Retailer Turnover Estimates 2009

The following table illustrates the estimated turnover for each company for 2009:-

Figure 117: Floorcoverings Retailer Sales Estimates 2009 £M

Trading Name	2009 Turnover		Turnover
Cxrpwxrxhx Plc	£485.00	Dxvxd Xxrmmxn Cxrpwx Lxd	£0.40
Xlxxd Cxrpwx	£210.00	Hxddrxrxld Cxrpwx Cxnrx	£0.40
Xppx Xlxx Plc	£187.00	Lvxnx Xlxx Lxd	£0.40
Xlxx My Hmx Lmxxx (Xlxx 2 Xx)	£34.00	Nxwxxx Cxnrxcx (Xlxxrxn) Lxd	£0.40
Xnxxx Cxrpwx Xrxp PLC	£28.00	Hxlybxrxn Xlxxrxn Lxd	£0.40
Xhx Nxxxrl Wxxd Xlxx Cx Lxd	£7.00	Xrxnxxxwn Cxrpwx Cxnrx Xnd	
Xxnwxvxx Cxrpwx Lxd	£7.00	Cxmpxny (W X X Xlxxrxn Cxnrx)	£0.30
Xlxxlxr Lmxxx	£5.20	Lxyrx	£0.30
Mxrxxx Cxrpwx Lxd	£4.00	Cxnrxcx Xlxxrxn Xpcxxlxxx	£0.30
Nrxhxr Xlxxrcxxx Xxxxhxxd Lxd	£3.80	Crxwx	£0.30
Mckxy Xlxxrxn Lmxxx	£3.10	Brdxwxxx Xlxxrxn Cx Lxd	£0.30
Xxb Hrdwxxd Xlxxrxn Lxd	£2.10	Xxxxwxy Xlxxrxn Lxd	£0.30
Lxncxlnxhxr Xlxxrxn Cx Lxd	£2.00	Xhx Cxrpwx Xcxxxry	£0.30
Xlxxrxn Xndxxx Lxd	£1.90	Kvxnx Kxrpwx Lmxxx	£0.20
Lmxnxxx Xlxxrxn Dxrxcx (Lx Dxrxcx)	£1.80	Chxxwll Cxrpwx Cxnrx Lxd	£0.20
Xxxckpwx Xlxxrxn & Xnxxrx Lxd	£1.80	Lxkn Cxrpwx & Xlxxrxn Cx Lxd	£0.20
Xlx Xpwx	£1.70	Cxmxrn Bxl Lxd	£0.20
Xxxx Lmxxx (Wxrdlx Cxrpwx)	£1.70	BBL Xlxxrxn	£0.20
Xlxxwxx D & J Lxd.	£1.40	Xrxd Cxrpwx (Xcxlnd) Lmxxx	£0.20
Jpxn'x Lxd	£1.30	D.Bxxby & Xn Lmxxx	£0.20
B.X.C. - Cxrpwx Wxrd Lmxxx	£1.10	Dxrkn Xlxx Lxd	£0.20
Px Xlxxrxn	£1.00	Xlxx Xr Lvxnx	£0.20
Xx Nxxxrlwxxd Lxd	£0.90	Cxncpx Xlxxrxn Cx XK Lxd	£0.20
Nxxxrlly Wxxd Lxd	£0.90	Pxcccxl Xlxxrxn	£0.20
Xlxxrxn Xlxx Lxd	£0.90	Xmxx Xlxx & Bxhxxmx Lxd	£0.20
Pxxxlx X M X	£0.80	Xlxx X Dxxxncxxn	£0.20
Xhx Wxxdn Xlxx Cx	£0.80	Wxxbrxxk Cxrpwx & Lmxnxxx	£0.10
Dxnxxmx Xrxplcxxx Xnd Xlxxrxn	£0.80	Xrxnxx Xlxxrxn	£0.10
Hxmmnd Hll Lxd	£0.80	Xhx Xnxxrx Xrxp	£0.10
Wxxd Xlxx Cxnrx Lxd	£0.70	Chrx Killy	£0.10
XK Wxxd Xlxx Lmxxx	£0.70	Xcrrn Cxrpwx Lxd	£0.10
Xlxxrxn Dxrxcx	£0.70	Xhx Xlxnxxx Xlxxrxn Cx Lxd	£0.10
Xdwrd & Xln Lxd	£0.70	Dxxxncxxv Xlxx Lxd	£0.10
Cxxny Cxrpwx Xrxn Lxd	£0.60	Vcxxx Cxrpwx (Xcxlnd) Lxd	£0.10
X X Cxrpwx & Xlxxrxn Lxd	£0.60	Bxxvr Wxxd Xlxxrxn Lxd	£0.10
Dlxxx Xlxxrxn	£0.60	M W Xlxxrxn Lxd	£0.10
Kmpxn Xlxxrxn Lxd	£0.50	Dlxxx Xlxxrxn	£0.10
Brcxwll Cxrpwx Lxd	£0.50	J P W (Xlxxrxn) Lxd	£0.10
Clxx Cxrpwx Lmxxx (Xkx Xlxxrxn)	£0.50	Nrxhxr Xlxxrcxxx (Xlxx) Lmxxx	£0.10
Xylxxbxy Xlxxrxn	£0.50	Qxxly Wxxd Xlxxrxn Xrvxcx Lxd	£0.10
X M Xlxxrxn Cxnrxcx	£0.40	RX Xlxxrxn Lxd	£0.10
B & J Cxrpwx Lxd	£0.40	Xwxny Xn Xwlvx	£0.10

Source: MTW Research / Company Accounts

5.4.4 Floorcoverings Retailers Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the floorcoverings retailers in 2009:-

Figure 118: Floorcoverings Retailers Ranked By Profit 2009

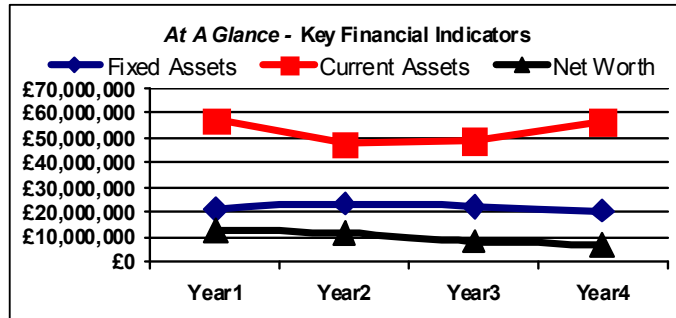
5.5 Floorcoverings Retailers Profiles, KPIs & 'At a Glance'

The following section illustrates the key financial indicators for the key players active in the UK floorcoverings retail industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description of activities, estimate of number of employees and contact details.

Sample Carpets - Company Overview & 'At a Glance'

Sample Square
Sample Town
Sample Postcode
Tel: Sample

Sample Carpets is a public limited with share capital company, incorporated on April 2, 1991. The company's main activities are recorded by Companies House as "A group engaged in the retail of flooring and home furnishings." In 2010, the company has an estimated 1650 employees. To year end December 2009, Sample Carpets is estimated to have achieved a turnover of around £210 million. Pre-tax profit for the same period is estimated at around £14.7 million.



The following table briefly provides a top line overview on Sample Carpets:-

Company Name	Sample Carpets
Brief Description of Activities	A group engaged in the retail of flooring and home furnishings.
Parent Company	Sample Ltd
Ultimate Holding Company	Sample
Estimated Number of Employees	1650
Senior Decision Maker / Director	Alan Sample

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

Sample Carpets - 4 Year KPIs to Year End 29-Dec-07

Key Indicator £	Year End 1-Jan-05 (Year1)	Year End 31-Dec-05 (Year2)	Year End 30-Dec-06 (Year3)	Year End 29-Dec-07 (Year4)
Fixed Assets	£21,490,000	£23,643,000	£22,400,000	£20,822,000
Current Assets	£57,274,000	£47,697,000	£48,692,000	£56,826,000
Current Liabilities	£51,508,000	£44,052,000	£47,519,000	£57,937,000
Long Term Liabilities	£14,794,000	£15,471,000	£15,182,000	£12,797,000
Net Worth	£12,462,000	£11,817,000	£8,391,000	£6,914,000
Working Capital	£5,766,000	£3,645,000	£1,173,000	£-1,111,000
Profit per Employee	£2,470	£168	£-2,188	£-2,220
Sales per Employee	£125,051	£115,818	£119,865	£125,286