

Market Development

Market Brief

on

WOODEN HOUSEHOLD FURNITURE

**Overview of the
EUROPEAN MARKET**

**Selected import markets:
Austria, Belgium, France, Germany,
Netherlands, and the United Kingdom**

April 2000

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

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**International Trade Centre UNCTAD/WTO
GENEVA
2000**

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Abbreviations

| | |
|--------|---|
| ACP | African, Caribbean and the Pacific basin countries enjoying preferences under the Lomé Convention |
| CEEC | Central and Eastern European Countries |
| CEN | European Committee for Standardization |
| CIF | Cost, Insurance & Freight |
| DIY | Do-it-yourself stores |
| EU | European Union |
| EFTA | European Free Trade Association |
| FOB | Free on Board |
| GNP | Gros National Product |
| GSP | Generalized System of Preferences |
| ISO | International Organization for Standardization |
| LDCs | Least developed countries |
| N.E.S. | Not elsewhere specified |

Values are given in US dollar with the conversion rates of 20 March 2000:

1 Euro = US\$ 0.973

Product classification

This Market Brief covers wooden household furniture classified under the following codes:

| SITC3 | HS | |
|--------|--------|---|
| 821.53 | 940340 | furniture, n.e.s., of wood, of a kind used in the kitchen |
| 821.55 | 940350 | furniture, n.e.s., of wood, of a kind used in the bedroom |
| 821.59 | 940360 | furniture, n.e.s., of wood, other |

EU Market

The furniture industry is one of the largest industries in the EU with a turnover of US\$ 72 billion in 1998 corresponding to a +4.1% growth as compared with 1997. It is estimated that wooden furniture represents 75% of the total furniture produced corresponding to US\$ 54.5 billion.

Thanks to the recovery in almost all the European countries, the European furniture industry saw for the first half of 1999 moderate growth rates. Production increased in all the EU countries except in Germany and in Austria.

- Exports:

Contrary to the modest production growth, furniture exports from most European countries are increasing and reaching record values. Exports are being stimulated both by increasing demand, especially from the USA and Japan overseas, the Russian Federation and other Eastern European countries, with disappointing levels of demand on home markets. The EU is the world largest exporter of wooden furniture. In 1998, Germany was the leading exporter and accounted for 30% of total EU exports. This clearly indicates that although the EU has a strong local production which requires competitiveness from developing countries, it is also an important re-exporter, which is an opportunity to reach other markets.

- Imports:

With US\$ 7 billion, the European Union is the world largest importer of wooden household furniture, accounting for about 47% of world imports. In 1998, the main EU importers were Germany (over US\$ 2 billion) and France (US\$ 1,1 billion). The market share of non-EU countries increased by 13.3% per year in value between 1994 and 1998 (raising the share to 33.2% of total EU imports in 1998).

During the period under review, several non-EU countries increased significantly their exports to the EU markets. The most significant change in the structure of household wooden furniture imports in the recent years has been the growing importance of supplies from Eastern Europe and Asia. Poland is still the main trade partner of the EU (especially of Germany) representing 19% of imports: imports from Poland rose by 17% to almost US\$ 1.27 billion.

The other Central and Eastern European Countries (CEEC) such as Slovakia or Czech Republic also increased their exports to the EU. South-East Asian countries, with the

exception of the Philippines, recorded growth rates exceeding 20% mainly thanks to the devaluation of their currencies. Indonesia increased its exports by 23% to reach US\$ 540 million. China, Malaysia, Thailand and Vietnam were also net exporters and recorded growth rates exceeding 15%. Imports from South Africa continued to rise (+19% to US\$ 345 million) whilst imports from Brazil dropped by 19% to US\$ 151 million.

There are some disparities in the product categories defining the wooden household furniture but in general non-EU countries have more importance in the EU markets for bedroom and other wooden furniture. The wooden kitchen furniture market has remained the reign of intra-EU trade with only 8% of market share for non-EU countries in 1998. This is a special segment where consumers rely on local production for an adapted service. Whereas, the wooden bedroom and other wooden furniture markets show improvement in market share for non-EU countries growing by 11% and 15% (in value) respectively. Therefore, developing countries should focus on these two segments which offer better opportunities.

Annex I indicates statistical details on EU imports of household furniture by category of products.

Market Characteristics

Wooden household furniture is a durable good, characterized by a high unit price and an enduring life span. Consumers have to own or to borrow a certain amount of capital for the purchase of furniture. The recent years of recession showed that purchases of furniture can be easily postponed. In the industrialized countries, households are well equipped and the market for new furniture is not expected to expand in the short term. Generally, 70% of the purchases of furniture are replacement purchases as tastes may have changed, incomes increased, etc.

- Consumer preferences

Durability of furniture is a key consideration, as people intend to keep the furniture longer than in the "throw away" period mentality in the 1980s. The consumer is a discerning and critical customer and always expect "value for money". The key requirements are sound quality and the suitability of the furniture for its designated use.

Functionality and comfort are an integral part of the total furniture-design in terms of the visual appearance.

The emphasis is on lighter wood like beech, birch and maple. In keeping with the trend of nostalgia and warmth, darker sorts like cherry, teak and alternatives are important. In addition, the demand in cane and rattan in faded colors and "antique" or "old plant" looks is increasing.

Solid wood is more in demand with a move from laminates and veneers, although, for budgetary reasons, they are still very significant.

Consumers are continually exposed to government and media publicity, therefore have become very knowledgeable about environmental matters and the demand in furniture which is produced in an environmentally sound way is increasing

The European Union's furniture industry has been declining annually in volume, as it suffered from the decreasing consumption in French and other European households and increasing competition from imports.

There is an excessive domestic competition on EU markets, as products have similar characteristics and lack differentiation. Moreover, consumer confidence has been low in most major markets, except the United Kingdom and the Netherlands.

The main raw material used for wooden furniture is the heveawood also called rubberwood. In fact, 70% of EU imports are rubberwood based. This material has been growing in importance in the furniture industry. Because of its even texture and light color, heveawood can be stained and finished to meet various market requirements which can match the appearance of Mahogany, Cherry, Walnut and Oak. Rubber is a permanent tree crop and has a general positive impact on the environment. Therefore, rubberwood is likely to meet the increasing environmental European requirements. Further information about rubberwood can be found in ITC publications on "heveawood" (contact person in ITC: Mr Tissari).

The attraction of rubberwood furniture for some European retailers is that it can be sold as a knock-down, low priced item in a solid wood which contrasts with ubiquitous flat-pack furniture based upon reconstituted wood panels.

Market Access

- Regulation and quality standards:

Although there are no official quality standards for furniture laid down by law in the European Union, the quality required by importers is extremely high. The strong European manufacturing industry produces wooden furniture of excellent quality, and the standards demanded by buyers are similarly high.

The EU harmonization committee CEN/TC207/Furniture is preparing European standards in the field of furniture, concentrating more particularly on terminology, safety and health, test method and dimensional co-ordination. Most CEN standards are based on an amalgamation of existing national standards and on the standards issued by the International Organization for Standardization (ISO). Concerning general international quality standards, ISO 9000/14000 is a valuable reference but there are several ISO standards related to furniture (see annex III). However, national quality standards and test methods still apply in many instances. For example, some countries such as the United Kingdom already require compliance with flame retardancy tests (the "smouldering cigarette" and the "burning match test") for upholstered furniture, and France has a similar law in preparation. These aspects are of particular importance concerning the wooden household furniture.

For all items of furniture, safety is the most important requirement with legislation in force at both the EU and individual national level to ensure that no unsafe products are offered for sale to consumers. On 29 June 1992, the EU issued Directive 92/59/EC for general product safety, which requires that all consumer goods must bear a safety guarantee. Since 29 July 1994, this directive has been in force in the national law of all EU countries. The legislation covers all products, such as the household furniture which are not covered by a specific directive.

- Tariffs

Since the completion of the single European Union market, the external trade conditions of all the member countries have been governed by common regulations and trading agreements. Once the required duties have been paid on goods imported from outside the EU to one individual EU market these goods can be circulated throughout the EU without further customs facilities.

With regard to trading agreements the EU took part in the worldwide trade liberalization through the General Agreement on Tariffs and Trade (GATT). For imports of wooden household furniture, the EU applies the following Common Custom Tariffs (measured as a percentage of the CIF value) as follows:

| | | |
|------------|--|------|
| 9403.40 | Wooden furniture of a kind used in the kitchen: | |
| 9403.40.10 | Fitted kitchen units | 2.7% |
| 9403.40.90 | Other | 2.7% |
| 9403.50 | Wooden furniture of a kind used in the bedroom | Free |
| 9403.60 | Other wooden furniture: | |
| 9403.60.10 | Wooden furniture of a kind used in the dining room and the living room | Free |
| 9403.60.90 | Other wooden furniture | Free |

(Source: World Tariff, January 2000)

Imports originating from African, Caribbean and Pacific States (ACP), and least developed countries (LDCs) are exempt from import duties (consignments need to be accompanied by an official certificate of origin EUR1).

Thailand and China have duty free access under the Generalized System of Preference (GSP). A documentary proof of origin "Form A" is needed.

In addition, the EU has signed bilateral free trade agreements with countries of CEEC (Hungary, the Czech Republic, the Slovak Republic, Poland, Bulgaria, and Romania). EFTA countries benefit from tariff-free entry into EU market. The EU has also bilateral trade agreements with Turkey, Cyprus, Malta, Israel, and regional agreements with the Maghreb countries (Morocco, Algeria, and Tunisia) and the Mashraq countries (Egypt, Jordan, Lebanon, and Syria). Exporters from these countries are advised to contact

National Export Promotion Organization for further details (a directory of Trade Promotion Organizations and other foreign trade bodies is published by ITC).

Prices

Due to the different styles and the different types of wood incorporated into the furniture prices vary considerably. In order to get a general idea on prices, one is requested to obtain catalogues from distributors present in different EU countries such as IKEA or Habitat. For detailed prices concerning a country, it is recommended to contact the importers directly. However, variables such as the type of wood used influence prices. In fact, prices of furniture vary with the use of rubberwood in furniture.

Distribution channels

Household furniture is mainly sold in specialized stores (selling exclusively furniture). There are more than 100 thousand furniture sales outlets employing 500 thousand people in the EU. Although specialist furniture stores have constantly accounted for between 75% to 90% of retail furniture sales, the distribution channels within this segment have fluctuated with relative importance, as shops in town centres slowly close due to outlets on the outskirts of town and cities. These shops have better parking facilities and are more convenient for purchasing bulky items of furniture, and being larger, they offer more choice and more competitive prices.

In the furniture sector, distribution is highly complex, involving a wide variety of retail outlets where the consumers can choose from a wide variety of furniture products offered by a large number of manufacturers. The furniture distribution is concentrated at a national level. Large-scale retailing has played an important part in rationalizing a sales network in Germany, France, and the United Kingdom. In the 5 largest EU countries (85% of EU sales), Germany, France, the United Kingdom, Italy and Spain, 49% of the sales are made through large-scale retailers.

Do-it-yourself stores (DIY) and mail order firms are increasing their market shares mainly in the lower quality segments and in the ready-to-assemble market. In Germany and France, sales networks are more modern and structured, with larger outlets and higher levels of efficiency. About 30 buying groups and their affiliates are responsible for two thirds of sales in Germany. The top ten of these groups hold 45% of the market.

In the past few years, the large showrooms have gained ground compared to the purchasing groups. They increased their shares of sales from 15 to 20%, depending on the country, while the purchasing groups saw their share fall. This growth is partly linked to the price pressure on the market and to the difficulties faced by the independent outlets which belong to a consortia of purchasing groups.

There are four types of purchasing groups:

- the groups of large outlets, which provide some common financial services;
- the traditional groups (mainly medium-sized), who offer associates a wide range of services;
- the groups in the kitchen segment;

- top end purchasing groups

Commercial practices

For starting traders, the most popular method of payment is an irrevocable letter of credit (LC) followed by documents against payment (D/P). LCs are widely used in the European Union when dealing with exporters from outside Europe. Once trading relationships are established, clean payments may be easier to handle. Exporters should nonetheless be aware that these payments can be a starting point for friction if the importer is not totally trustworthy.

Goods may be delivered on a number of different terms, ranging from "ex works" to "delivered duty paid". The standard delivery terms are laid down in the so-called Incoterms 1990, established by the International Chamber of Commerce (Paris, France). The most common used delivery terms are:

- FOB (Free On Board): the buyer arranges for transportation and insurance. FOB must specify the port of departure
- C&F (Cost & Freight): the exporter pays the freight, the buyer arranges the insurance
- CIF (Cost, Insurance & Freight): the exporter pays the freight and the insurance

The EURO (European common currency) has been in place since January 1999 and all European transactions are now quoted in EURO, but this is not yet a requirement to non-EU exporters. It is best to quote prices (FOB or CIF) in US\$, always remembering that the exchange rate between the US\$ and the European currencies vary, influencing the prices at the moment of the transaction. Due to the fluctuating exchange rate it is strongly advised not to guarantee product prices over an extended period of time, but to quote prices linked to date and exchange rates. Regarding the final price of the product, transaction must always be subject to a final confirmation. This avoids problems with fluctuating exchange rates. In addition, to prevent currency fluctuation risks on the commodity market, banks provide the exporters with several financial products. It is strongly advised to the exporters to refer to its bank for practice information.

Packaging and labelling

- Packaging:

It is very important that European market suppliers are aware of agreements such as the EU Directive 94/62/EC on Packaging and Packaging Waste, and take appropriate measures in order to become or remain interesting trade partners. Although these directives concern European producers, the exporters will take the responsibility for the environment requirements. This means that packaging materials (transport packaging, surrounding packaging and sales packaging) should be limited and be re-usable or recyclable. If it is necessary to pack products individually, one should as far as possible, try to use (recycled) paper, cardboard, polythene or polypropylene. The products should preferably be packed together in recyclable cardboard boxes. Composite materials which are difficult to recycle should be avoided. Unless the exporter takes these measures, the importer will be confronted with additional costs, thus reducing the

competitiveness of the final product. Due to the fact that the regulations are constantly changing, exporters are advised to check the latest regulations and requirements regarding packaging and comply with the specifications of the importers on a contractual basis.

Appropriate export packaging must be used to ensure that the product is protected from damage during storage, transport and distribution. The ITC publication "Manual on the Packaging of Furniture" recommends different areas for attention by furniture exporters. For example, packaging design must be adapted to the dimensions of the container and for the usage of standard-size pallets, especially for heavy solid wooden furniture items, to facilitate handling by mechanical means, which is the standard in most European countries.

Transport packages should be clearly marked with the name and address of the exporter and the importer, the country of origin, the port of transshipment, and with information on the contents for exact identification. The importer will also require that the article number is marked on the outside of the packaging. The use of bar codes which can be read by sensors is now widespread in European wholesale and retail distribution.

- **Labelling:**

With regards to labelling for retail sales of furniture there are no legally binding requirements and labels are primarily used as promotion sales tools. However, consumers do expect labelling to provide them with basic information, especially concerning quality. In several European countries standard labelling systems are introduced by the trade industry to ensure that consumers are informed. In addition, the Ecolabel, which clearly indicates the environmental friendliness of individual products, is of growing importance in some EU markets. The existence of such labelling systems in the EU markets mean that it is very important for suppliers to provide full and detailed information on the furniture they are selling.

Sales Promotion

The main revolution in sales promotion has been the Internet and its usage as a promotion tool. Internet allows reaching more consumers worldwide at a low cost. The United States is currently the largest market for e-commerce in the furniture industry, but new initiatives are being launched in Europe, particularly in the United Kingdom, the Netherlands, Finland and Italy. At present, the business-to-consumer segment is not developed and expectations are moderate, whereas huge increases are expected in the business-to-business segment of furniture. In fact, sales promotion and e-commerce from manufacturers to retailers concern directly SMEs in developing countries and this segment offer the best opportunities for development.

Although the new furniture chosen by households is increasingly a matter of individual choice and taste, consumers are heavily influenced in the orientation phase by different sorts of promotion such as media, catalogues, home and garden fairs (see annex IV), store presentation, etc.

Participation in a specialized trade fair abroad can be a very efficient tool to communicate with a market. It offers the exporter a forum for personal contacts, an opportunity for a 3-Dimension presentation of his products, the presence and interest of potential customers and the possibility of seeing competitive ranges of products at first hand. The most important aspect is still the opportunity to finalize contracts.

The leading international fairs for domestic furniture in Europe are the exhibitions in Cologne (Germany), Paris (France) and Milan (Italy). The three fairs differ somewhat in the variety of exhibitors and trade visitors they attract (see annex IV for full details).

Leading national magazines for the furniture trade in the major EU countries are:

- | | | |
|------------------|---|---------------------------------------|
| Germany: | - | Möbelmarkt |
| | - | Möbel-Kultur |
| | - | Euwid |
| France: | - | Le Courrier du Meuble et de l'Habitat |
| | - | Revue de l'Ameublement |
| | - | Art et décoration |
| United Kingdom: | - | Cabinet Maker |
| | - | Furniture Manufacturer |
| | - | Furnishing |
| The Netherlands: | - | Wonen |
| | - | Meubel |
| | - | Mobilia |
| | - | Ons Huis |

Market Prospects

The successful export development of the wooden furniture industry in developing countries can be explained by its ability to maintain highly competitive prices based on low labor costs as well as the availability of relatively cheap raw materials - rubberwood - which today accounts for about 75% to 80% of the timber used in furniture manufacturing. However, with increasing labor shortages and dwindling supplies of rubberwood, experts doubt that the present rate of growth can be sustained much longer.

Some European importers who have stopped their imports from developing countries due to the quality factor. This trend should be of a growing importance in the coming years, knowing that the top-end buyer is demanding more and more quality for the same price. Exporters will have to consider quality as a major requirement to get sustainable relationships with importers.

The European Union is a vast market for wooden household furniture and extra-EU imports have more importance since they offer competitive prices and improved quality. In the long term, prospects for the market are better, even though nobody expects the

boom years of the late 1980s to be repeated. The following factors should have a positive influence on the market for the coming years:

- there is a huge inherited wealth and a rising number of affluent older Europeans;
- increasing interest from the consumer in better quality and modern/timeless design furniture (discounting and cutthroat price offers do still remain a negative feature for the market);
- the total number of households and the number of households with two incomes is ever increasing;
- private demand is planned to increase by more than 3% in real terms in almost all countries;
- revenues are increasing again whilst unemployment should continue to decrease;
- good perspective in construction of new houses.

Austria

Austria is the eighth largest European producer of furniture: it ranks just behind the Netherlands but ahead of Belgium. Production decreased by 1.1% in the first quarter of 1999 compared to the same period in 1998. Almost 90% of its production is wooden furniture, which can be explained by the large local wood industry. However, the level of production is below the level of consumption and the difference is mainly due to the decrease in production because of growing competition and retail prices for furniture that have been under severe pressure.

Austria remains an important household wooden furniture exporter and provided the EU markets a total value of US\$ 127 million in 1998. However, its exports are facing high fluctuations every year and have been declining in value since 1994.

Wooden furniture imports from Austria accounted for 8% of the total value of EU imports in 1998 and represented the sixth largest imports value in the EU with US\$ 557 million. The suppliers are EU countries for 90% with Germany being the largest one with more than a 60% share of the market since 1994. Although non-EU countries are increasing their market share in Austria, it is still not representative in the Austrian market.

Five large groups (*Leiner-Kika, Lutz, IKEA, Garant and Michelfeit*), controlled 35% of the Austrian in 1998. The Austrian market is served by modern distribution (the large scale-specialists trade and purchasing groups) by 80%. Independent retailers controlled 12% of the market in 1998 and the rest was in the hand of artisans and the building trade. More concentration around the purchasing groups and large scale specialists is expected for the coming years.

Note: The companies directory include mainly medium or small size buyers, excluding multinationals such as IKEA who has its buying division centralised in Stockholm. The reason is that large companies have their own buying agents in exporting countries and their production channels set up.

Belgium

The Belgium market is a small market with less than 3% of total EU sales but often used as a pilot market for foreign exporters. However, annual per capita expenditure is higher than the European average.

Sales of furniture have been very weak for the last years and are declining for the last seven years. Demand is extremely sensitive to general economic conditions and there has still been downward pressure on disposable incomes caused by governmental fiscal measures to reduce the budget deficit, higher taxes and a relatively high unemployment rate.

Belgium has a small but significant furniture industry, which is very export dependent. Over half of Belgian furniture production is exported. The current strong sectors are, in order of importance, the dining room furniture, upholstered furniture and kitchen furniture.

Imports accounted for 8.7% of the total value of EU imports of wooden furniture in 1998. The largest suppliers were EU countries (78.6% in 1998) such as Germany and the Netherlands accounting respectively for 23.6 and 14.9% of Belgian imports in 1998. However, imports from EU countries have been constantly declining since 1995 whereas extra-EU imports have increased in the meantime. Suppliers from Asia such as Indonesia, China or India and from Eastern Europe such as Poland, the Czech Republic or Slovakia are becoming of a growing importance.

The main furniture distributors by order of importance are *IKEA* (market leader), *Musterring*, and *l'Univers du Cuir*. A number of commercial structures are involved in the furniture distribution in Belgium: independent retailers control 35% of the market in 1998, purchasing groups 15% and large scale specialist distribution 25%. The remaining share of the market is divided among DIY retailers, mail order and direct sales (artisans, building trade, etc.). The part of independent retailers is expecting to lose ground while specialist large-scale distribution and buying groups should increase their revenue.

France

France is the second largest furniture market in the European Union, even though French households have a lower consumption level of furniture than other countries of comparable wealth. Annually, 7 million households (23% of households) buy some form of furniture. The market is composed of more than 11,000 outlets, specialized or not in furniture selling.

It is a major source of concern for trade that household expenditures on furniture have been falling steadily since 1980. Uncertainty about the future (relatively high levels of unemployment, stagnation in income levels, increased savings, etc.), a slackening in the construction industry and a tendency to spend on other durable goods instead of wooden furniture are key reasons for poor sales. Moreover, cutthroat price competition has affected consumer confidence. Prospects are improving, the French market has picked up modestly since 1998 and the construction activity has already recorded significant increase in 1999.

France is the third largest producer of wooden furniture in the EU after Germany and Italy, although the household sector is not the most important one. Its exports are lower than its imports and focused on other EU countries.

France is the second largest importer of household wooden furniture in the EU, accounting for 5.5% of EU imports. Despite a stagnant consumer market for furniture, wooden furniture imports have continued to rise and increased by 6% between 1994 and 1998 to a total of more than US\$ 1 billion. Imports from the EU countries accounted for nearly 70% in 1998 and the key suppliers in order of importance were Italy (14.8%), Spain (13.1%), and Germany (11.1%). However, extra-EU imports are growing in importance, increasing by 10.8% annually between 1994 and 1998 (36.6% market share in 1998). Asian countries such as Indonesia, China, Viet Nam, Malaysia and India, have penetrated the French market in recent years and are becoming significant extra-EU partners.

More than a quarter of the sales on the French market are made through the outlets of *Conforama*, *But*, *G.R.A.M.*, *IKEA*, *Atlas* and *Monsieur Meuble*. *Conforama* and *But* are the backbone of the so-called "équipement du foyer" channel, where furniture is traded alongside consumer electronics. This channel supplied 25% of sales in 1998. *IKEA* and *Fly*, on the other hand, make up the "jeune habitat" channel whose share of the market was 10% in 1998, and is increasing rapidly. The specialists (in kitchens, bedding, etc.) make up a combined share of 25%. Traditional furniture retailers claimed about 20% of the market and some of them are part of purchasing groups. Artisans control 5% of the market, but this share is dwindling.

In recent years, the discount and DIY specialists (*Lapeyre*, *Leroy Merlin*, *Castorama*) have gained ground while the specialists have lost ground. These results together with the significant second-hand furniture market and the rise in the average age of "jeune habitat" clients (currently around 38 years old), are all indicators of the difficulties faced by the furniture industry in France.

Germany

In Germany the furniture market is worth US\$ 31 billion at retail prices. It is the leading EU country in terms of power of consumption, production and organized distribution. There are more than 15,000 stores employing 110,000 persons.

German furniture manufacturers recorded a decline of 2.1% in their production during the first eight months of 1999. Some sectors (kitchen and bedroom) were more acutely affected than others. Despite its major furniture production and export base, Germany imports more than exports. The deficit in the trade balance has widened considerably, not only owing to growing imports but also as a result of stagnant exports, which have been affected by the strong currency (DM), high domestic wages and energy costs, expensive state taxes, and environmental regulations. Growing attention is levelled at the sustainability of German's environmental policies, from the recycling of packaging materials to the utilization of wood from forests with re-forestation plans.

Germany is by far the largest EU importer of furniture, accounting for more than 30% of the total value of EU imports in 1998. Italy is the single largest supplier and accounted for 22% of German imports in 1998. Other key EU suppliers are Denmark (18.8%), Austria (5.1%) and France (3.9%). Germany's suppliers were EU countries for 63.4% of its imports but non-EU countries are increasing their market share (+3.8% yearly between 1994 and 1998) to reach 36.6% in 1998. In the same period, Poland was the third largest supplier with an 8.7% share. The Czech Republic, Estonia, Slovakia and Latvia have all increased their exports to Germany. Imports from Asia and especially Indonesia (+29.6%), China (+8.6%) and India (+62.6%) have also increased, although their market share is still not significant.

After several years of continuous growth, the sales of furniture in Germany have been stagnating, as have the imports. Negative influences on spending have included higher taxes, rising unemployment, higher health and pension costs, lower household removal rates and a slowdown in the construction activity. Moreover, the initial period of high spending for East Germany to "catch up" with West Germany has slowed down.

The top 25 German furniture distributors control almost 50% of the market; the top 5 alone (*VKG, GFM, Der Kreis, Metro* and *Europa Möbel*) control over 20%. The market distribution is in the hands of 10 chains, including *Metro* and *IKEA*. Moreover, two of these chains, *Otto* and *Quelle*, also operate through mail order. A further 30% is controlled by purchasing groups: *VME, Begros, Atlas, Regent* and *GFM*. (See annex V)

Efforts are being made with the "cocooning" effect that is likely to stay, to more homely timeless interiors since fashionable prestigious furniture will lose ground; and to sectors like bathroom and self-assembly furniture where demand is becoming strong.

Germany should be considered as a market with great opportunities for wooden household furniture exporters. Since the cost of labour at home is among the highest in the world, the majority of the larger German companies have relocated some of their production abroad. Poland has been the prime target, but German furniture producers have also made direct investment in Italy, France, Bosnia and the Asia Pacific region.

The Netherlands

The Netherlands is not a major EU market but Dutch households are being motivated to spend more readily on furniture. Despite the compact size of the Netherlands market there are regional differences in expenditure on furniture. Households in the three largest cities (Amsterdam, Rotterdam, the Hague) as well as in the north spend less than those in the rest of the country.

The Netherlands has a very small furniture manufacturing industry and it is increasingly becoming export-oriented. The industry's contribution to the country's GNP is low in comparison to its average contribution in the EU as a whole. Within the wooden furniture segment, seating is the most important product group, followed by kitchen furniture and furniture for café's, restaurants and shops.

The Netherlands is a large net importer of domestic furniture. It is the fourth largest EU importer after Germany, France and the United Kingdom, with 12% of the total value of EU imports in 1998. Germany and Belgium are the largest suppliers and accounted for almost 50% of its imports in 1998. Although 66% of the wooden furniture imports were still originated from EU countries in 1998, non-EU countries are becoming of a growing importance and recorded a 19.3% increase in market share between 1994 and 1998. Asian and Eastern Europe countries have increased their presence since 1994, Indonesia with a 43.4% increase and a 7.8% market share in 1998 is becoming a significant exporter as well as Poland or Romania who were accounting for almost 10% of the market in 1998.

In the Netherlands 50% of furniture is distributed by independent retailers. The remainder is served by outlets linked to purchasing groups (15%), large scale specialist distribution (20%) and direct sales (through artisans, the building trade, etc., 15%). Major retailers and buying groups import directly from exporters while small independent furniture retailers contact import agents. The leading furniture distributor on the Dutch market is the Dutch based branch of the Swedish group *IKEA* and is increasing its market share every year. Other important distributors are *Garant* and *Der Kreis* which, have more than 110 sales outlets each.

The port of Rotterdam functions as a crucial transportational hub in Europe through which almost 300 million tonnes of products are distributed annually to the rest of Europe. This is a key advantage for the Netherlands and an important factor for penetrating the other northern EU countries.

Although disposable income has been negatively affected in the last few years by several factors such as increasing costs of healthcare, pensions, or property taxes influenced by government policy, consumer confidence is growing and should remain for the coming years. The positive overall prospects for domestic wooden furniture sales are expected to continue.

United Kingdom

The United Kingdom is the third largest wooden household furniture market in the EU after Germany and France. Furniture has traditionally been a low priority purchase in the United Kingdom and spending per capita is lower than the EU average.

The United Kingdom is the fourth largest furniture manufacturer in the European Union. The production of wooden furniture represents 85% of the total. Upholstered furniture is the most important sector, amounting to 16% of the total. Over three quarters of the furniture purchased by consumers in the United Kingdom is British made and only a relatively small proportion of furniture production is exported. In 1998, total wooden furniture exports represented 5% of EU exports.

The United Kingdom is the third largest importer of wooden household furniture in the EU, accounting for 12% of the total value of EU imports in 1998. Italy was the largest supplier and accounted for 12.1% of the United Kingdom's imports in 1998. The United Kingdom has the particularity of importing more from non-EU countries (50.3%) than from EU countries (49.7%). However, there are nuances by product categories, for instance wooden kitchen furniture imports from EU countries accounted for 86% of total imports. Asia is the main origin of extra-EU imports of wooden furniture with countries increasing their market share between 1994 and 1998 such as Indonesia (+37.4%), Malaysia (+40.1%), China (+44.5%), Thailand (+46.6%), India (+53.9%), or Viet Nam (+84.4%). These countries accounted for 23.6% of the United Kingdom's imports in 1998.

The leading furniture distributor is *MFI* with 185 centres, followed by *IKEA* with a market share of 3%. *DFS*, the third largest operator, has 23 stores with an average showroom area of 1,400 square meters and *Habitat* is growing in importance with more than 40 stores. Particularly aggressive in the field of distribution of first price kitchen furniture is the *Limelight group*, which controls the *Moben* and *Kitchen Direct* chains. In the bedding segment, growth was apparent for *Bensons* (taken over by *Rosebys*): more than 150 specialists outlets.

One of the principal features of distribution in the United Kingdom is that a large share is controlled by small chains (between 3 and 10 outlets), such as John Lewis (of the same name as the large chain of department stores), *Kingsbury*, *Heals*, etc. The main characteristic of furniture retailing is the importance of non-specialized channels (35% of the market). In this area, department and DIY stores play a leading role. Independent retailers (35% of the market) tend to be specialized.

Domestic furniture consumption has been improving the last five years, it is driven by the strength of the British economy and the recovery of the housing market. Positive influences related to the British market for the near future include the healthy housing and household removal market, and sales through the DIY channel that appear quite dynamic.

ANNEX I

EU imports of wooden household furniture by product and country of origin

EU IMPORTS OF WOODEN FURNITURE (SITC3: 821.5)
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| IMPORTERS | Origin | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|-------|----------|-------|
| | | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| EU IMPORTS | WORLD | 509949 | 1650249 | 6223388 | 1809315 | 6749535 | 1999506 | 6533441 | 2191660 | 6984465 | 2501831 | 100.0 | 7.0 | 100.0 | 10.8 |
| | INTRA E.U. | 3730796 | 963696 | 4492801 | 1066527 | 4837427 | 1188851 | 4428725 | 1247747 | 4663554 | 1449565 | 66.8 | 4.4 | 57.9 | 10.2 |
| | EXTRA E.U. | 1369152 | 686553 | 1730587 | 742788 | 1912107 | 810655 | 2104716 | 943913 | 2320911 | 1052265 | 33.2 | 13.3 | 42.1 | 11.6 |
| GERMANY | INTRA E.U. | 1350601 | 311850 | 1456555 | 304881 | 1559161 | 352052 | 1352296 | 347166 | 1358874 | 338499 | 63.4 | -0.6 | 45.2 | 3.0 |
| | EXTRA E.U. | 634355 | 354018 | 816496 | 382328 | 801346 | 387560 | 770847 | 415413 | 786080 | 411105 | 36.6 | 3.8 | 54.8 | 3.9 |
| | ITALY | 438827 | 86044 | 523506 | 92866 | 536504 | 105113 | 449441 | 99506 | 475862 | 106128 | 22.2 | 0.1 | 14.2 | 5.0 |
| FRANCE | DENMARK | 377300 | 93966 | 473199 | 100047 | 503296 | 116562 | 420409 | 120628 | 403434 | 110017 | 18.8 | 0.2 | 14.7 | 5.2 |
| | POLAND | 236431 | 159223 | 335854 | 189560 | 333493 | 194454 | 337806 | 217380 | 357414 | 221857 | 16.7 | 8.7 | 29.6 | 8.3 |
| | AUSTRIA | 189852 | 19937 | 72161 | 6736 | 100916 | 10960 | 99122 | 14801 | 109062 | 14474 | 5.1 | -7.6 | 1.9 | 1.5 |
| U.K. | INTRA E.U. | 603470 | 182057 | 726473 | 203210 | 737921 | 210326 | 673440 | 245380 | 752842 | 285243 | 69.5 | 3.7 | 65.0 | 11.5 |
| | EXTRA E.U. | 224384 | 108205 | 258916 | 111375 | 286422 | 120980 | 333045 | 143291 | 330272 | 153498 | 30.5 | 10.8 | 35.0 | 10.0 |
| | ITALY | 156733 | 36521 | 169916 | 36770 | 176796 | 42383 | 146288 | 42601 | 160804 | 48398 | 14.8 | -1.0 | 11.0 | 7.4 |
| NETHERLANDS | BELGIUM-LUX | 125443 | 30015 | 148359 | 33736 | 135586 | 29897 | 117429 | 33221 | 119389 | 32916 | 11.0 | -3.3 | 7.5 | 1.7 |
| | GERMANY | 102770 | 39113 | 113227 | 43997 | 108892 | 41989 | 106625 | 53303 | 120621 | 69448 | 11.1 | 2.6 | 15.8 | 14.3 |
| | INTRA E.U. | 296049 | 71498 | 295719 | 70143 | 316399 | 67256 | 366794 | 80737 | 416323 | 107209 | 49.7 | 9.4 | 41.9 | 10.0 |
| AUSTRIA | EXTRA E.U. | 205825 | 82130 | 244372 | 88207 | 284855 | 101204 | 349943 | 120413 | 421317 | 148773 | 50.3 | 19.6 | 58.1 | 16.2 |
| | ITALY | 74482 | 16373 | 68098 | 13902 | 70434 | 13551 | 95347 | 19121 | 101733 | 25602 | 12.1 | 10.1 | 10.0 | 12.9 |
| | DENMARK | 53027 | 14053 | 47956 | 12793 | 49460 | 12477 | 43081 | 9785 | 51057 | 14087 | 6.1 | -1.8 | 5.5 | -2.6 |
| BELGIUM-LUX | INTRA E.U. | 500081 | 135318 | 504651 | 118820 | 517269 | 124351 | 436764 | 130899 | 418577 | 132668 | 66.0 | -4.9 | 58.8 | 0.6 |
| | EXTRA E.U. | 101071 | 49526 | 142469 | 57917 | 150876 | 57759 | 182336 | 73687 | 215766 | 92786 | 34.0 | 19.3 | 41.2 | 16.1 |
| | GERMANY | 288664 | 70900 | 277930 | 60056 | 275909 | 57854 | 237696 | 61958 | 235573 | 70999 | 37.1 | -5.5 | 31.5 | 0.3 |
| NETHERLANDS | INTRA E.U. | * | * | 514125 | 117335 | 509519 | 115080 | 445815 | 123781 | 479893 | 207970 | 78.6 | * | 78.8 | * |
| | EXTRA E.U. | * | * | 46808 | 17380 | 68782 | 25698 | 102585 | 41946 | 130916 | 55985 | 21.4 | * | 21.2 | * |
| | GERMANY | * | * | 162508 | 36563 | 164228 | 36027 | 142142 | 38533 | 143960 | 45543 | 23.6 | * | 17.3 | * |
| AUSTRIA | NETHERLANDS | * | * | 115726 | 24365 | 108475 | 22217 | 96035 | 23103 | 90846 | 25544 | 14.9 | * | 9.7 | * |
| | INTRA E.U. | 461062 | 118799 | 568966 | 137781 | 592405 | 155983 | 496905 | 141720 | 489735 | 146963 | 87.9 | -0.1 | 80.4 | 4.6 |
| | EXTRA E.U. | 47256 | 26131 | 64887 | 29304 | 78033 | 34427 | 75207 | 37343 | 67620 | 35886 | 12.1 | 9.0 | 19.6 | 9.2 |
| GERMANY | GERMANY | 315380 | 86638 | 390929 | 96573 | 395971 | 106465 | 340815 | 99598 | 343091 | 107640 | 61.6 | 0.3 | 58.9 | 4.8 |
| | ITALY | 75231 | 14244 | 94840 | 22088 | 104470 | 25534 | 85693 | 21028 | 77818 | 18079 | 14.0 | -0.3 | 9.9 | 4.4 |

**EU IMPORTS OF WOODEN FURNITURE (SITC3: 821.5) BY COUNTRY OF ORIGIN
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)**

| COUNTRY OF ORIGIN | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|-------|----------|-------|
| | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| WORLD | 5099949 | 1650249 | 6223388 | 1809315 | 6749535 | 1999506 | 6533441 | 2191660 | 6984465 | 2501831 | 100.0 | 7.0 | 100.0 | 10.8 |
| ITALY | 867583 | 176455 | 1054030 | 200946 | 1100971 | 236206 | 988262 | 223939 | 1055189 | 254915 | 15.1 | 3.6 | 10.2 | 8.8 |
| GERMANY | 824726 | 225375 | 1037998 | 260349 | 1074981 | 272765 | 975114 | 289270 | 1017784 | 343382 | 14.6 | 3.6 | 13.7 | 9.9 |
| DENMARK | 663399 | 176420 | 772807 | 177637 | 796162 | 194370 | 680415 | 205195 | 698518 | 213702 | 10.0 | -0.2 | 8.5 | 5.4 |
| POLAND | 309440 | 207412 | 439142 | 240742 | 448878 | 248164 | 469186 | 285594 | 508314 | 304906 | 7.3 | 11.2 | 12.2 | 9.9 |
| BELGIUM-LUX | 343377 | 97743 | 387313 | 97326 | 382802 | 94536 | 349896 | 109529 | 356472 | 113636 | 5.1 | -0.3 | 4.5 | 4.3 |
| FRANCE | 146978 | 38875 | 230143 | 53412 | 294776 | 73608 | 294921 | 83473 | 315057 | 146136 | 4.5 | 19.4 | 5.8 | 36.3 |
| SPAIN | 134410 | 30906 | 206287 | 42375 | 263848 | 56513 | 274994 | 71626 | 300022 | 89614 | 4.3 | 20.8 | 3.6 | 30.4 |
| ROMANIA | 206959 | 125415 | 242726 | 129784 | 249120 | 135015 | 241008 | 145628 | 250239 | 146349 | 3.6 | 3.8 | 5.8 | 4.3 |
| INDONESIA | 57902 | 18302 | 86892 | 25521 | 133203 | 38556 | 189617 | 55219 | 249916 | 90990 | 3.6 | 44.8 | 3.6 | 48.9 |
| SWEDEN | 182373 | 66102 | 187921 | 63292 | 220254 | 68715 | 209824 | 75311 | 221182 | 92358 | 3.2 | 5.1 | 3.7 | 8.8 |
| U.K. | 143312 | 62631 | 162823 | 68925 | 208893 | 82902 | 190165 | 78938 | 196238 | 72877 | 2.8 | 8.2 | 2.9 | 4.5 |
| NETHERLANDS | 86759 | 23428 | 222482 | 49207 | 211386 | 52651 | 189282 | 46524 | 195046 | 49125 | 2.8 | 15.7 | 2.0 | 15.3 |
| BRAZIL | 117617 | 52382 | 143525 | 55727 | 172493 | 70175 | 187883 | 76094 | 151478 | 63778 | 2.2 | 8.1 | 2.5 | 7.3 |
| AUSTRIA | 206972 | 22529 | 77025 | 7777 | 122183 | 14073 | 117022 | 18342 | 127529 | 18210 | 1.8 | -5.4 | 0.7 | 4.4 |
| CHINA | 36613 | 15190 | 49765 | 19520 | 65406 | 25090 | 81924 | 33573 | 111244 | 46062 | 1.6 | 31.3 | 1.8 | 31.8 |
| CZECH REP | 58429 | 30808 | 92691 | 35938 | 96921 | 36841 | 95317 | 37667 | 96039 | 40608 | 1.4 | 10.8 | 1.6 | 6.2 |
| PORTUGAL | 59234 | 22441 | 75313 | 24116 | 80629 | 24619 | 79606 | 27554 | 88612 | 31368 | 1.3 | 9.0 | 1.3 | 8.4 |
| SWITZ.LIECHT | 64408 | 12396 | 83293 | 12800 | 85284 | 17697 | 74548 | 17532 | 81462 | 18578 | 1.2 | 3.7 | 0.7 | 11.9 |
| MALAYSIA | 18988 | 6912 | 26629 | 9138 | 35900 | 13292 | 50535 | 18668 | 71596 | 28825 | 1.0 | 39.0 | 1.2 | 42.9 |
| SLOVENIA | 60410 | 23570 | 69220 | 22989 | 70255 | 24308 | 69451 | 27370 | 64548 | 25056 | 0.9 | 1.4 | 1.0 | 3.0 |
| ESTONIA | 13852 | 9051 | 23865 | 11285 | 30242 | 13773 | 38785 | 20263 | 57657 | 32700 | 0.8 | 39.6 | 1.3 | 37.1 |
| S.AFR.CUS.UN | 41459 | 23329 | 48398 | 24966 | 52982 | 26864 | 56523 | 29496 | 57469 | 32067 | 0.8 | 8.4 | 1.3 | 8.4 |
| FINLAND | 53350 | 16027 | 51001 | 16621 | 46146 | 12852 | 47843 | 13411 | 54151 | 17399 | 0.8 | -0.3 | 0.7 | -0.5 |
| USA,PR,USVI | 35127 | 7197 | 35838 | 7188 | 43355 | 8356 | 46760 | 8992 | 52515 | 9245 | 0.8 | 11.3 | 0.4 | 7.5 |
| INDIA EX SIK | 7449 | 1943 | 9297 | 2963 | 20284 | 7033 | 34225 | 11970 | 47217 | 16775 | 0.7 | 64.8 | 0.7 | 77.0 |
| OTH.ASIA NES | 57582 | 16900 | 50117 | 14845 | 45794 | 14165 | 48522 | 16294 | 45175 | 15582 | 0.6 | -5.0 | 0.6 | -0.7 |
| THAILAND | 36049 | 13467 | 39357 | 13681 | 44722 | 15720 | 47251 | 16302 | 44712 | 17603 | 0.6 | 6.3 | 0.7 | 7.4 |

EU IMPORTS OF WOODEN KITCHEN FURNITURE (SITC3: 821.53)
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| IMPORTERS | Origin | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|-------|----------|-------|
| | | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| EU IMPORTS | WORLD | 640341 | 167556 | 727100 | 179044 | 797697 | 195533 | 777546 | 216153 | 814323 | 246301 | 100.0 | 5.6 | 100.0 | 10.1 |
| | INTRA E.U. | 591508 | 145627 | 672376 | 158874 | 741999 | 174691 | 710400 | 185827 | 749214 | 215007 | 92.0 | 5.4 | 87.3 | 9.8 |
| | EXTRA E.U. | 48833 | 21928 | 54724 | 20170 | 55698 | 20842 | 67146 | 30325 | 65109 | 31294 | 8.0 | 8.1 | 12.7 | 11.8 |
| GERMANY | INTRA E.U. | 91852 | 24300 | 66869 | 21933 | 84643 | 28458 | 78433 | 23310 | 96620 | 25062 | 82.2 | 2.6 | 67.2 | 1.2 |
| | EXTRA E.U. | 18998 | 9376 | 18048 | 7154 | 19748 | 7836 | 20755 | 11652 | 20980 | 12212 | 17.8 | 3.4 | 32.8 | 10.7 |
| | ITALY | 16412 | 3799 | 24405 | 5926 | 30566 | 8512 | 23020 | 6178 | 32143 | 8403 | 27.3 | 13.7 | 22.5 | 17.7 |
| FRANCE | AUSTRIA | 51103 | 6656 | 14117 | 1420 | 19217 | 3389 | 20863 | 3766 | 27158 | 4894 | 23.1 | -8.4 | 13.1 | 3.7 |
| | DENMARK | 1917 | 247 | 4336 | 451 | 4737 | 549 | 4243 | 714 | 12782 | 3169 | 10.9 | 45.8 | 8.5 | 74.4 |
| | INTRA E.U. | 74596 | 24858 | 87333 | 28389 | 98291 | 33448 | 95118 | 36871 | 115143 | 43465 | 90.7 | 10.0 | 88.8 | 14.8 |
| U.K. | EXTRA E.U. | 9576 | 3760 | 12086 | 3507 | 11023 | 4494 | 16703 | 6859 | 11873 | 5499 | 9.3 | 7.8 | 11.2 | 15.4 |
| | U.K. | 17748 | 10808 | 24597 | 13983 | 29957 | 15881 | 27963 | 15232 | 31018 | 16145 | 24.4 | 13.3 | 33.0 | 9.3 |
| | GERMANY | 29574 | 5482 | 32288 | 5320 | 32705 | 5721 | 30008 | 6402 | 29667 | 7571 | 23.4 | -0.7 | 15.5 | 8.7 |
| NETHERLANDS | ITALY | 13888 | 4649 | 16967 | 5641 | 19370 | 6948 | 18747 | 7635 | 24263 | 10480 | 19.1 | 12.9 | 21.4 | 21.3 |
| | SPAIN | 2892 | 1160 | 4873 | 2030 | 7870 | 3240 | 10579 | 5383 | 16670 | 6290 | 13.1 | 53.4 | 12.8 | 54.6 |
| | INTRA E.U. | 74982 | 16776 | 71229 | 14878 | 68681 | 13878 | 82368 | 15872 | 76597 | 20021 | 86.0 | 1.9 | 80.7 | 4.3 |
| BELGIUM-LUX | EXTRA E.U. | 9956 | 3784 | 10502 | 3433 | 9073 | 3055 | 11355 | 3667 | 12449 | 4794 | 14.0 | 5.4 | 19.3 | 5.5 |
| | ITALY | 31916 | 7809 | 26667 | 6282 | 25579 | 6250 | 37386 | 7790 | 33485 | 12410 | 37.6 | 4.4 | 50.0 | 12.1 |
| | GERMANY | 21485 | 3781 | 21923 | 3314 | 20244 | 3093 | 24796 | 3615 | 27760 | 4269 | 31.2 | 6.6 | 17.2 | 3.3 |
| AUSTRIA | INTRA E.U. | 203974 | 43912 | 197257 | 35034 | 199667 | 34889 | 173964 | 38230 | 164464 | 41930 | 99.0 | -5.4 | 98.3 | -0.1 |
| | EXTRA E.U. | 562 | 244 | 1080 | 403 | 1556 | 463 | 1490 | 488 | 1679 | 728 | 1.0 | 28.6 | 1.7 | 26.8 |
| | GERMANY | 178592 | 36895 | 169258 | 28287 | 172321 | 28129 | 154030 | 31521 | 145707 | 36893 | 87.7 | -4.9 | 86.5 | 1.1 |
| NETHERLANDS | INTRA E.U. | * | * | 121222 | 25178 | 124359 | 23900 | 111728 | 26281 | 104557 | 29607 | 96.8 | * | 95.0 | * |
| | EXTRA E.U. | * | * | 1118 | 419 | 2452 | 1064 | 2797 | 1379 | 3491 | 1574 | 3.2 | * | 5.0 | * |
| | GERMANY | * | * | 63114 | 12013 | 67499 | 12296 | 58365 | 12888 | 55723 | 13147 | 51.6 | * | 42.2 | * |
| AUSTRIA | FRANCE | * | * | 25314 | 4412 | 22544 | 3954 | 19256 | 3972 | 15291 | 3110 | 14.2 | * | 10.0 | * |
| | NETHERLANDS | * | * | 20806 | 4089 | 20632 | 4358 | 21557 | 4326 | 13167 | 3401 | 12.2 | * | 10.9 | * |
| | INTRA E.U. | 52701 | 11649 | 62698 | 15054 | 73324 | 19550 | 64040 | 18445 | 63805 | 17116 | 97.2 | 4.1 | 92.3 | 10.2 |
| NETHERLANDS | EXTRA E.U. | 2203 | 740 | 1536 | 475 | 1846 | 621 | 1897 | 1053 | 1810 | 1435 | 2.8 | -1.8 | 7.7 | 23.6 |
| | GERMANY | 47622 | 10053 | 55152 | 12199 | 63275 | 15165 | 57671 | 16139 | 58267 | 15553 | 88.8 | 4.6 | 83.8 | 12.2 |

EU IMPORTS OF WOODEN KITCHEN FURNITURE (SITC3: 821.53) BY COUNTRY OF ORIGIN
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| COUNTRY OF ORIGIN | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|-------|----------|-------|
| | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| WORLD | 640341 | 167556 | 727100 | 179044 | 797697 | 195533 | 777546 | 216153 | 814323 | 246301 | 100.0 | 5.6 | 100.0 | 10.1 |
| GERMANY | 309413 | 61931 | 357039 | 63582 | 384950 | 68868 | 355464 | 75866 | 354690 | 86310 | 43.6 | 2.7 | 35.0 | 8.8 |
| ITALY | 83680 | 21839 | 101765 | 26950 | 120457 | 32374 | 123610 | 32060 | 139288 | 43738 | 17.1 | 12.9 | 17.8 | 16.9 |
| U.K. | 26115 | 15173 | 35653 | 20452 | 46966 | 23733 | 48935 | 25093 | 49798 | 26568 | 6.1 | 17.4 | 10.8 | 14.2 |
| SPAIN | 6225 | 1816 | 12629 | 4039 | 18336 | 5515 | 24829 | 9886 | 39040 | 12701 | 4.8 | 54.5 | 5.2 | 61.4 |
| FRANCE | 25576 | 7591 | 47880 | 12395 | 49856 | 12907 | 44472 | 10536 | 35761 | 7974 | 4.4 | 6.1 | 3.2 | -0.6 |
| DENMARK | 21891 | 6038 | 17778 | 4063 | 14097 | 2716 | 13284 | 4165 | 32326 | 9839 | 4.0 | 5.0 | 4.0 | 10.5 |
| AUSTRIA | 54839 | 7472 | 14712 | 1594 | 23349 | 4232 | 25436 | 4837 | 31921 | 5868 | 3.9 | -5.2 | 2.4 | 6.5 |
| BELGIUM-LUX | 37472 | 13185 | 40148 | 11921 | 38029 | 10720 | 28342 | 9990 | 26941 | 8679 | 3.3 | -9.6 | 3.5 | -9.6 |
| NETHERLANDS | 4376 | 1033 | 25622 | 6098 | 25758 | 6291 | 27763 | 6789 | 21213 | 5562 | 2.6 | 38.2 | 2.3 | 41.5 |
| POLAND | 9377 | 4627 | 11072 | 4592 | 9802 | 4138 | 11226 | 7696 | 13265 | 9612 | 1.6 | 7.3 | 3.9 | 21.9 |
| SWEDEN | 12783 | 5689 | 9751 | 5019 | 11304 | 4496 | 10235 | 3937 | 10794 | 4618 | 1.3 | -2.9 | 1.9 | -6.4 |
| SLOVENIA | 6009 | 2169 | 5726 | 2011 | 6943 | 2125 | 5767 | 2328 | 6086 | 2082 | 0.7 | 0.3 | 0.8 | 0.6 |
| THAILAND | 1515 | 606 | 2066 | 844 | 3417 | 1545 | 6968 | 3179 | 6031 | 3058 | 0.7 | 48.9 | 1.2 | 57.8 |
| MALAYSIA | 488 | 160 | 918 | 326 | 3372 | 1217 | 4461 | 1835 | 5357 | 2471 | 0.7 | 89.1 | 1.0 | * |
| BRAZIL | 6753 | 2582 | 5553 | 1812 | 5758 | 2353 | 5553 | 2488 | 4580 | 2078 | 0.6 | -7.5 | 0.8 | -1.2 |
| PORTUGAL | 2718 | 1985 | 2672 | 1188 | 3100 | 1486 | 3464 | 1574 | 4439 | 2352 | 0.5 | 13.2 | 1.0 | 6.4 |
| S.AFR.CUS.UN | 5923 | 2251 | 4389 | 1327 | 3011 | 1000 | 5580 | 2071 | 4077 | 2149 | 0.5 | -4.9 | 0.9 | 3.6 |
| INDONESIA | 566 | 173 | 1198 | 350 | 1704 | 541 | 2196 | 706 | 2886 | 956 | 0.4 | 47.2 | 0.4 | 51.0 |
| ROMANIA | 2988 | 1795 | 3123 | 1468 | 3616 | 1740 | 3060 | 1704 | 2756 | 1799 | 0.3 | -1.8 | 0.7 | 1.5 |
| NORWAY | 1560 | 379 | 1988 | 426 | 1790 | 355 | 2578 | 1302 | 2458 | 569 | 0.3 | 12.4 | 0.2 | 21.3 |
| CROATIA | 705 | 229 | 636 | 141 | 421 | 114 | 1469 | 309 | 1975 | 419 | 0.2 | 33.6 | 0.2 | 22.1 |
| CHINA | 1005 | 433 | 1185 | 563 | 1491 | 558 | 1508 | 719 | 1924 | 829 | 0.2 | 16.6 | 0.3 | 16.7 |
| USA,PR,USVI | 603 | 261 | 1676 | 403 | 1625 | 331 | 1502 | 193 | 1889 | 475 | 0.2 | 24.3 | 0.2 | 4.7 |
| FINLAND | 5739 | 1747 | 5407 | 1359 | 4641 | 1127 | 2977 | 831 | 1560 | 484 | 0.2 | -27.4 | 0.2 | -26.3 |
| CZECH REP | 766 | 280 | 1242 | 335 | 1353 | 455 | 1338 | 732 | 1300 | 823 | 0.2 | 12.0 | 0.3 | 34.1 |
| ESTONIA | 421 | 325 | 1077 | 502 | 895 | 402 | 874 | 478 | 1139 | 548 | 0.1 | 19.5 | 0.2 | 10.5 |
| SWITZLIECHT | 1037 | 142 | 1081 | 73 | 1829 | 182 | 1440 | 162 | 988 | 177 | 0.1 | 1.9 | 0.1 | 13.1 |

EU IMPORTS OF WOODEN BEDROOM FURNITURE (SITC3: 821.55)

(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| IMPORTERS | Origin | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------|-------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|----------|-------|----------|-------|
| | | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| EU IMPORTS | WORLD | 1228412 | 449002 | 1564156 | 519660 | 1678294 | 575968 | 1540833 | 593733 | 1576572 | 634593 | 100.0 | 5.0 | 100.0 | 8.6 |
| | INTRA E.U. | 918995 | 284741 | 1145831 | 331275 | 1233549 | 368310 | 1067888 | 367804 | 1081416 | 389947 | 61.4 | 2.6 | 61.4 | 7.6 |
| | EXTRA E.U. | 309418 | 164261 | 418325 | 188385 | 444745 | 207658 | 473145 | 225928 | 495157 | 244646 | 38.6 | 11.2 | 38.6 | 10.3 |
| GERMANY | INTRA E.U. | 381763 | 105195 | 415925 | 103643 | 449900 | 123083 | 349077 | 111329 | 336143 | 104030 | 45.3 | -4.2 | 45.3 | 0.5 |
| | EXTRA E.U. | 183150 | 102678 | 252801 | 117512 | 244343 | 123161 | 227902 | 126026 | 228120 | 125725 | 54.7 | 3.4 | 54.7 | 4.9 |
| | DENMARK | 174585 | 45707 | 208061 | 48912 | 224955 | 58540 | 171675 | 55107 | 164013 | 51410 | 22.4 | -3.1 | 22.4 | 3.6 |
| FRANCE | POLAND | 83130 | 57848 | 122307 | 73595 | 127752 | 80632 | 125875 | 85934 | 135050 | 87660 | 38.2 | 10.5 | 38.2 | 10.4 |
| | INTRA E.U. | 141934 | 53447 | 176679 | 65620 | 185518 | 64010 | 170657 | 72322 | 183972 | 85066 | 75.8 | 5.0 | 75.8 | 10.8 |
| | EXTRA E.U. | 41358 | 19212 | 45893 | 18351 | 54283 | 22443 | 74708 | 29160 | 61039 | 27109 | 24.9 | 13.5 | 24.2 | 12.2 |
| U.K. | SPAIN | 19199 | 5879 | 27828 | 8041 | 45317 | 12381 | 40279 | 13032 | 39847 | 16307 | 16.3 | 20.1 | 14.5 | 28.7 |
| | BELGIUM-LUX | 38101 | 14198 | 49931 | 17801 | 44370 | 13796 | 37976 | 12909 | 38187 | 13085 | 15.6 | -2.7 | 11.7 | -4.7 |
| | GERMANY | 23035 | 12050 | 23801 | 14810 | 22778 | 14857 | 24328 | 19043 | 30172 | 25540 | 12.3 | 5.8 | 22.8 | 19.2 |
| NETHERLANDS | ITALY | 24924 | 6476 | 30538 | 8073 | 29248 | 7964 | 24680 | 7902 | 27716 | 9846 | 11.3 | 0.0 | 8.8 | 8.5 |
| | INTRA E.U. | 69655 | 20442 | 70911 | 19850 | 80124 | 20631 | 97308 | 25250 | 114197 | 29493 | 58.9 | 13.9 | 47.9 | 10.2 |
| | EXTRA E.U. | 42942 | 21980 | 49392 | 22545 | 58275 | 26603 | 75272 | 30971 | 79763 | 32112 | 41.1 | 18.1 | 52.1 | 11.4 |
| BELGIUM-LUX | BRAZIL | 13802 | 7786 | 17206 | 8402 | 22146 | 10662 | 24165 | 11171 | 24777 | 11278 | 12.8 | 16.3 | 18.3 | 10.8 |
| | DENMARK | 26600 | 7338 | 24442 | 7696 | 25460 | 7157 | 22998 | 4836 | 24612 | 6898 | 12.7 | -2.1 | 11.2 | -5.7 |
| | ITALY | 7254 | 1749 | 7630 | 1625 | 8668 | 1592 | 16115 | 4671 | 21563 | 3634 | 11.1 | 34.0 | 5.9 | 28.6 |
| NETHERLANDS | BELGIUM-LUX | 4187 | 1497 | 6168 | 1857 | 11476 | 3088 | 17291 | 4969 | 21175 | 7661 | 10.9 | 53.3 | 12.4 | 53.0 |
| | INTRA E.U. | 106615 | 39907 | 111783 | 37429 | 121219 | 40910 | 98597 | 42697 | 87309 | 36879 | 75.5 | -5.1 | 75.9 | -0.3 |
| | EXTRA E.U. | 11550 | 5737 | 21246 | 8804 | 22715 | 9046 | 21564 | 8681 | 28284 | 11692 | 24.5 | 19.8 | 24.1 | 15.1 |
| BELGIUM-LUX | GERMANY | 61802 | 22300 | 63145 | 19717 | 63194 | 20129 | 52738 | 22064 | 52785 | 23272 | 45.7 | -4.8 | 47.9 | 2.0 |
| | BELGIUM-LUX | 26049 | 11254 | 27574 | 10842 | 27209 | 9172 | 26614 | 11062 | 19797 | 7581 | 17.1 | -5.7 | 15.6 | -7.4 |
| | INTRA E.U. | * | * | 136527 | 40744 | 124231 | 35070 | 111460 | 38140 | 113654 | 44385 | 81.8 | * | 79.0 | * |
| AUSTRIA | EXTRA E.U. | * | * | 9748 | 4220 | 11609 | 5657 | 16673 | 7442 | 25250 | 11809 | 18.2 | * | 21.0 | * |
| | GERMANY | * | * | 51026 | 14609 | 49026 | 13798 | 42790 | 14078 | 40567 | 15219 | 29.2 | * | 27.1 | * |
| | NETHERLANDS | * | * | 25645 | 6487 | 21457 | 5385 | 19629 | 5825 | 20041 | 6447 | 14.4 | * | 11.5 | * |
| AUSTRIA | INTRA E.U. | 149862 | 45401 | 168070 | 46178 | 170615 | 50493 | 134996 | 45634 | 127014 | 47842 | 89.2 | -5.4 | 86.3 | 0.9 |
| | EXTRA E.U. | 9284 | 4650 | 16169 | 6706 | 20022 | 7620 | 18496 | 8000 | 15358 | 7606 | 10.8 | 12.1 | 13.7 | 12.3 |
| | GERMANY | 117764 | 38094 | 129982 | 37728 | 127287 | 38389 | 102593 | 35805 | 94810 | 37181 | 66.6 | -6.5 | 67.1 | -1.0 |
| ITALY | 12171 | 2146 | 15440 | 2880 | 15106 | 3815 | 12048 | 3201 | 12477 | 3303 | 8.8 | -2.0 | 6.0 | 10.2 | |

**EU IMPORTS OF WOODEN BEDROOM FURNITURE (SITC3: 821.55) BY COUNTRY OF ORIGIN
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)**

| COUNTRY OF ORIGIN | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|----------|-------|----------|-------|
| | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| WORLD | 1228412 | 449002 | 1564156 | 519660 | 1678294 | 575968 | 1540833 | 593733 | 1576572 | 634593 | 100.0 | 5.0 | 100.0 | 8.6 |
| DENMARK | 253862 | 67778 | 304461 | 75507 | 331919 | 87028 | 259606 | 81876 | 258975 | 85021 | 16.4 | -1.2 | 13.4 | 5.5 |
| GERMANY | 221929 | 77863 | 282524 | 91077 | 285494 | 93771 | 248622 | 98464 | 243103 | 109290 | 15.4 | 0.5 | 17.2 | 7.9 |
| POLAND | 96305 | 67781 | 145674 | 85553 | 152390 | 92680 | 154255 | 100104 | 173290 | 107685 | 11.0 | 13.1 | 17.0 | 11.4 |
| ITALY | 125186 | 28638 | 158171 | 32728 | 161621 | 44707 | 143105 | 39612 | 149062 | 39111 | 9.5 | 2.5 | 6.2 | 8.5 |
| BELGIUM-LUX | 106376 | 37300 | 125156 | 40666 | 117367 | 35052 | 107997 | 39458 | 103470 | 38438 | 6.6 | -2.0 | 6.1 | 0.3 |
| FRANCE | 34370 | 12220 | 59983 | 19667 | 75721 | 28500 | 72222 | 29661 | 73424 | 31018 | 4.7 | 18.6 | 4.9 | 25.5 |
| BRAZIL | 49017 | 23592 | 66252 | 27516 | 77844 | 32982 | 81725 | 34192 | 61971 | 27703 | 3.9 | 7.0 | 4.4 | 5.5 |
| SPAIN | 32006 | 8927 | 42898 | 11418 | 62360 | 16344 | 57387 | 17833 | 61372 | 22472 | 3.9 | 17.3 | 3.5 | 25.8 |
| SWEDEN | 28405 | 13733 | 36188 | 15086 | 37789 | 13618 | 45238 | 18156 | 47681 | 21292 | 3.0 | 13.4 | 3.4 | 11.2 |
| NETHERLANDS | 12187 | 6868 | 43388 | 12830 | 43722 | 12519 | 36652 | 11594 | 37388 | 11126 | 2.4 | 23.0 | 1.8 | 9.0 |
| ROMANIA | 23110 | 12879 | 25287 | 11717 | 31388 | 14712 | 28516 | 13685 | 32581 | 15584 | 2.1 | 8.4 | 2.5 | 5.5 |
| SWITZ.LIECHT | 34808 | 7488 | 53660 | 9530 | 41652 | 10509 | 36392 | 10340 | 32096 | 10236 | 2.0 | -5.4 | 1.6 | 7.3 |
| AUSTRIA | 47769 | 5721 | 23496 | 2684 | 38023 | 4254 | 32483 | 4427 | 31943 | 4388 | 2.0 | -4.7 | 0.7 | -0.3 |
| UNTD KINGDOM | 19012 | 13426 | 28892 | 17922 | 36505 | 20303 | 26967 | 14752 | 26194 | 11035 | 1.7 | 5.9 | 1.7 | -5.7 |
| CZECH REP | 20868 | 10366 | 24763 | 9715 | 23404 | 9418 | 24951 | 10740 | 26175 | 11092 | 1.7 | 4.7 | 1.7 | 2.4 |
| PORTUGAL | 24036 | 7877 | 25130 | 7156 | 28860 | 7871 | 23183 | 7130 | 24807 | 7361 | 1.6 | -0.2 | 1.2 | -1.4 |
| SLOVAKIA | 6247 | 4124 | 8609 | 3595 | 13420 | 4576 | 21809 | 7702 | 22920 | 8418 | 1.5 | 42.3 | 1.3 | 24.5 |
| S.AFR.CUS.UN | 17441 | 10099 | 16592 | 8570 | 19627 | 10212 | 21631 | 11153 | 22337 | 12050 | 1.4 | 7.9 | 1.9 | 6.4 |
| ESTONIA | 3516 | 2745 | 6352 | 3473 | 7001 | 3370 | 8662 | 4541 | 21582 | 14486 | 1.4 | 48.3 | 2.3 | 43.3 |
| FINLAND | 9740 | 3508 | 11569 | 3724 | 11136 | 3725 | 11067 | 3932 | 19147 | 7464 | 1.2 | 14.0 | 1.2 | 16.9 |
| SLOVENIA | 15278 | 4750 | 17065 | 4897 | 14785 | 4584 | 13669 | 4278 | 11312 | 3507 | 0.7 | -7.9 | 0.6 | -7.1 |
| MALAYSIA | 422 | 183 | 1085 | 518 | 3224 | 1581 | 5854 | 2268 | 8434 | 3109 | 0.5 | * | 0.5 | * |
| CHINA | 1235 | 506 | 1934 | 645 | 3458 | 1203 | 4725 | 1582 | 6155 | 2527 | 0.4 | 50.8 | 0.4 | 50.9 |
| INDONESIA | 2614 | 960 | 3009 | 1262 | 4378 | 1607 | 5830 | 1615 | 6126 | 2387 | 0.4 | 26.7 | 0.4 | 23.0 |
| LATVIA | 1735 | 902 | 2506 | 1028 | 2808 | 1342 | 3138 | 1796 | 5890 | 3208 | 0.4 | 30.6 | 0.5 | 36.3 |
| USA,PR,USVI | 3492 | 854 | 3159 | 679 | 4629 | 928 | 5121 | 1051 | 5282 | 1165 | 0.3 | 14.0 | 0.2 | 11.2 |
| ZIMBABWE | 2505 | 1560 | 3162 | 1724 | 3368 | 1899 | 4341 | 2027 | 4563 | 2096 | 0.3 | 16.4 | 0.3 | 7.8 |

EU IMPORTS OF OTHER WOODEN FURNITURE (SITC3: 821.59)
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| IMPORTERS | Origin | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|-------|----------|-------|
| | | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| EU IMPORTS | WORLD | 3231195 | 1033692 | 3932132 | 1110611 | 4273543 | 1228005 | 4215062 | 1381775 | 4593569 | 1620936 | 100.0 | 8.0 | 100.0 | 11.8 |
| | INTRA E.U. | 2220294 | 533328 | 2674593 | 576378 | 2861878 | 645850 | 2650636 | 694116 | 2832923 | 844611 | 61.7 | 4.9 | 52.1 | 11.7 |
| | EXTRA E.U. | 1010902 | 500364 | 1257538 | 534233 | 1411664 | 582155 | 1564425 | 687659 | 1760645 | 776325 | 38.3 | 14.2 | 47.9 | 12.0 |
| GERMANY | INTRA E.U. | 876986 | 182355 | 973761 | 179305 | 1024618 | 200510 | 924787 | 212527 | 926111 | 209407 | 63.3 | 0.6 | 43.4 | 4.6 |
| | EXTRA E.U. | 432207 | 241964 | 545647 | 257661 | 537255 | 256564 | 522190 | 277734 | 536980 | 273169 | 36.7 | 4.0 | 56.6 | 3.2 |
| | ITALY | 352093 | 66596 | 417813 | 70954 | 428423 | 78867 | 364808 | 76418 | 387757 | 82934 | 26.5 | 0.6 | 17.2 | 5.3 |
| FRANCE | DENMARK | 200798 | 48012 | 260802 | 50684 | 273604 | 57474 | 244491 | 64807 | 226639 | 55438 | 15.5 | 1.8 | 11.5 | 5.5 |
| | POLAND | 144691 | 97147 | 203531 | 111808 | 197367 | 110259 | 202193 | 124621 | 212392 | 126563 | 14.5 | 7.9 | 26.2 | 6.6 |
| | INTRA E.U. | 386940 | 103751 | 462461 | 109202 | 454112 | 112869 | 407665 | 136187 | 453727 | 156712 | 63.8 | 1.9 | 56.5 | 11.0 |
| U.K. | EXTRA E.U. | 173450 | 85233 | 200936 | 89517 | 221117 | 94043 | 241634 | 107271 | 257361 | 120889 | 36.2 | 10.2 | 43.5 | 9.2 |
| | ITALY | 117921 | 25396 | 122411 | 23057 | 128178 | 27472 | 102861 | 27064 | 108826 | 28072 | 15.3 | -3.3 | 10.1 | 3.7 |
| | SPAIN | 50787 | 11750 | 77237 | 14192 | 77344 | 16599 | 72128 | 21824 | 85589 | 28964 | 12.0 | 10.2 | 10.4 | 25.0 |
| NETHERLANDS | BELGIUM-LUX | 80429 | 14952 | 92426 | 15189 | 85362 | 15034 | 73706 | 18934 | 74939 | 18763 | 10.5 | -3.6 | 6.8 | 7.0 |
| | INTRA E.U. | 152928 | 56366 | 184478 | 62229 | 217507 | 71547 | 263316 | 85776 | 329106 | 111867 | 59.3 | 20.8 | 66.0 | 18.4 |
| | EXTRA E.U. | 151412 | 34280 | 153579 | 35415 | 167594 | 32747 | 187117 | 39615 | 225529 | 57695 | 40.7 | 10.5 | 34.0 | 12.2 |
| BELGIUM-LUX | BELGIUM-LUX | 14839 | 5252 | 17915 | 5572 | 33446 | 8437 | 43641 | 12180 | 53734 | 18777 | 9.7 | 41.4 | 11.1 | 39.5 |
| | INDONESIA | 14504 | 3816 | 19779 | 5667 | 28173 | 7614 | 39949 | 9880 | 47964 | 13944 | 8.6 | 36.3 | 8.2 | 37.0 |
| | ITALY | 35312 | 6814 | 33800 | 5994 | 36187 | 5709 | 41846 | 6660 | 46685 | 9557 | 8.4 | 8.0 | 5.6 | 8.1 |
| NETHERLANDS | INTRA E.U. | 88959 | 43545 | 120143 | 48710 | 126605 | 48250 | 159283 | 64518 | 185802 | 80366 | 52.7 | 19.2 | 59.9 | 16.3 |
| | EXTRA E.U. | 189492 | 51499 | 195611 | 46357 | 196382 | 48552 | 164203 | 49972 | 166804 | 53860 | 47.3 | -4.2 | 40.1 | 1.7 |
| | BELGIUM-LUX | 49459 | 14293 | 54125 | 12935 | 62329 | 15766 | 56200 | 18918 | 51032 | 15667 | 14.5 | 1.0 | 11.7 | 5.8 |
| BELGIUM-LUX | INDONESIA | 11567 | 4357 | 15995 | 5275 | 23608 | 6646 | 37557 | 11895 | 48785 | 19830 | 13.8 | 45.2 | 14.8 | 46.9 |
| | INTRA E.U. | * | * | 256376 | 51412 | 260930 | 56110 | 222626 | 59361 | 261682 | 133978 | 71.9 | * | 75.9 | * |
| | EXTRA E.U. | * | * | 35942 | 12742 | 54721 | 18977 | 83115 | 33125 | 102174 | 42601 | 28.1 | * | 24.1 | * |
| AUSTRIA | NETHERLANDS | * | * | 69275 | 13788 | 66385 | 12474 | 54850 | 12952 | 57638 | 15695 | 15.8 | * | 8.9 | * |
| | GERMANY | * | * | 48368 | 9941 | 47703 | 9933 | 40987 | 11567 | 47670 | 17177 | 13.1 | * | 9.7 | * |
| | INTRA E.U. | 258499 | 61749 | 338199 | 76550 | 348466 | 85939 | 297868 | 77640 | 298916 | 82005 | 85.6 | 1.6 | 75.3 | 6.0 |
| AUSTRIA | EXTRA E.U. | 35769 | 20741 | 47182 | 22124 | 56165 | 26186 | 54815 | 28290 | 50452 | 26845 | 14.4 | 8.7 | 24.7 | 7.9 |
| | GERMANY | 149994 | 38491 | 205795 | 46647 | 205409 | 52911 | 180550 | 47654 | 190014 | 54906 | 54.4 | 3.5 | 50.4 | 7.6 |
| | ITALY | 58315 | 10581 | 72284 | 16454 | 80726 | 17556 | 68945 | 15933 | 61148 | 13650 | 17.5 | 0.5 | 12.5 | 4.9 |

EU IMPORTS OF OTHER WOODEN FURNITURE (SITC3: 821.59) BY COUNTRY OF ORIGIN
(V: US\$' 000; Q: Metric Tons; Trend: 1994-1998)

| COUNTRY OF ORIGIN | 1994 | | 1995 | | 1996 | | 1997 | | 1998 | | Value | | Quantity | |
|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|-------|----------|-------|
| | V | Q | V | Q | V | Q | V | Q | V | Q | Share 98 | Trend | Share 98 | Trend |
| WORLD | 3231195 | 1033692 | 3932132 | 1110611 | 4273543 | 1228005 | 4215062 | 1381775 | 4593569 | 1620936 | 100.0 | 8.0 | 100.0 | 11.8 |
| ITALY | 648717 | 125978 | 794095 | 141269 | 818894 | 159125 | 721546 | 152267 | 766840 | 172066 | 16.7 | 2.4 | 10.6 | 7.2 |
| GERMANY | 293384 | 85581 | 398435 | 105690 | 404537 | 110126 | 371028 | 114940 | 419991 | 147782 | 9.1 | 6.7 | 9.1 | 12.5 |
| DENMARK | 387646 | 102604 | 450568 | 98068 | 450146 | 104627 | 407525 | 119154 | 407217 | 118842 | 8.9 | 0.0 | 7.3 | 5.0 |
| POLAND | 203759 | 135004 | 282397 | 150597 | 286686 | 151347 | 303704 | 177794 | 321760 | 187609 | 7.0 | 10.4 | 11.6 | 8.6 |
| INDONESIA | 54723 | 17170 | 82686 | 23909 | 127120 | 36408 | 181592 | 52898 | 240903 | 87647 | 5.2 | 45.5 | 5.4 | 50.0 |
| BELGIUM-LUX | 199529 | 47258 | 222008 | 44740 | 227405 | 48764 | 213557 | 60081 | 226060 | 66519 | 4.9 | 2.1 | 4.1 | 10.3 |
| ROMANIA | 180861 | 110740 | 214317 | 116599 | 214116 | 118563 | 209433 | 130239 | 214903 | 128967 | 4.7 | 3.3 | 8.0 | 4.2 |
| FRANCE | 87033 | 19065 | 122280 | 21351 | 169199 | 32201 | 178227 | 43276 | 205872 | 107144 | 4.5 | 23.4 | 6.6 | 51.6 |
| SPAIN | 96179 | 20162 | 150760 | 26917 | 183152 | 34655 | 192778 | 43907 | 199610 | 54441 | 4.3 | 18.6 | 3.4 | 28.1 |
| SWEDEN | 141185 | 46680 | 141982 | 43186 | 171161 | 50600 | 154352 | 53218 | 162706 | 66448 | 3.5 | 3.7 | 4.1 | 9.6 |
| NETHERLANDS | 70195 | 15528 | 153473 | 30280 | 141906 | 33841 | 124867 | 28141 | 136445 | 32437 | 3.0 | 11.9 | 2.0 | 15.0 |
| UNTD KINGDOM | 98185 | 34032 | 98278 | 30551 | 125422 | 38866 | 114262 | 39093 | 120245 | 35273 | 2.6 | 5.7 | 2.2 | 3.2 |
| CHINA | 34373 | 14251 | 46647 | 18312 | 60458 | 23329 | 75692 | 31272 | 103164 | 42706 | 2.2 | 30.8 | 2.6 | 31.4 |
| BRAZIL | 61847 | 26208 | 71720 | 26399 | 88891 | 34839 | 100605 | 39414 | 84926 | 33997 | 1.8 | 10.2 | 2.1 | 9.6 |
| CZECH REP | 36795 | 20162 | 66686 | 25888 | 72164 | 26968 | 69028 | 26195 | 68564 | 28694 | 1.5 | 13.6 | 1.8 | 7.4 |
| AUSTRIA | 104364 | 9336 | 38817 | 3500 | 60811 | 5587 | 59103 | 9079 | 63665 | 7954 | 1.4 | -5.5 | 0.5 | 6.5 |
| PORTUGAL | 32480 | 12579 | 47512 | 15773 | 48669 | 15261 | 52959 | 18850 | 59366 | 21654 | 1.3 | 14.1 | 1.3 | 13.5 |
| MALAYSIA | 18078 | 6570 | 24626 | 8293 | 29304 | 10494 | 40220 | 14565 | 57805 | 23245 | 1.3 | 32.5 | 1.4 | 36.2 |
| SWITZ.LIECHT | 28563 | 4766 | 28553 | 3197 | 41802 | 7005 | 36716 | 7029 | 48379 | 8165 | 1.1 | 13.9 | 0.5 | 20.5 |
| SLOVENIA | 39122 | 16651 | 46428 | 16081 | 48527 | 17600 | 50015 | 20763 | 47151 | 19467 | 1.0 | 4.6 | 1.2 | 5.8 |
| INDIA EX SIK | 6855 | 1804 | 8874 | 2848 | 19411 | 6745 | 32833 | 11490 | 45589 | 16244 | 1.0 | 66.5 | 1.0 | 78.4 |
| USA,PR,USVI | 31032 | 6082 | 31004 | 6106 | 37101 | 7097 | 40136 | 7748 | 45344 | 7605 | 1.0 | 10.7 | 0.5 | 7.1 |
| OTH-ASIA NES | 53721 | 15790 | 47011 | 14022 | 43467 | 13421 | 43802 | 14808 | 40430 | 14171 | 0.9 | -6.2 | 0.9 | -1.6 |
| THAILAND | 34012 | 12749 | 36932 | 12753 | 40706 | 13964 | 39741 | 12945 | 38470 | 14461 | 0.8 | 3.2 | 0.9 | 2.7 |
| VIET NAM | 3912 | 1480 | 6237 | 2383 | 14319 | 5593 | 29252 | 13393 | 37755 | 15847 | 0.8 | 83.7 | 1.0 | 90.9 |
| HUNGARY | 31211 | 12633 | 37756 | 13171 | 37082 | 12709 | 32154 | 12609 | 36700 | 13607 | 0.8 | 1.6 | 0.8 | 1.1 |
| ESTONIA | 9916 | 5982 | 16436 | 7310 | 22346 | 10000 | 29249 | 15243 | 34937 | 17666 | 0.8 | 36.3 | 1.1 | 33.7 |

ANNEX II

LDCs and ACP countries list

Least Developed Countries (LDCs)

| | |
|----------------------------------|-----------------------------|
| Afghanistan | Liberia |
| Angola | Madagascar |
| Bangladesh | Malawi |
| Benin | Maldives |
| Bhutan | Mali |
| Burkina Faso | Mauritania |
| Burundi | Mozambique |
| Cambodia | Myanmar |
| Cape Verde | Nepal |
| Central African Republic | Niger |
| Chad | Rwanda |
| Comoros | Samoa |
| Democratic Republic of the Congo | Sao Tome and Principe |
| Djibuti | Sierra Leone |
| Equatorial Guinea | Solomon Islands |
| Eritrea | Somalia |
| Ethiopia | Sudan |
| Gambia | Togo |
| Guinea | Tuvalu |
| Guinea-Bissau | Uganda |
| Haiti | United Republic of Tanzania |
| Kiribati | Vanuatu |
| Lao People's Democratic Republic | Yemen |
| Lesotho | Zambia |

African, Caribbean and Pacific States (ACP)

| | |
|----------------------------------|----------------------------------|
| Angola | Lesotho |
| Antigua and Barbuda | Liberia |
| Bahamas | Madagascar |
| Barbados | Malawi |
| Belize | Mali |
| Benin | Mauritania |
| Botswana | Mozambique |
| Burkina Faso | Namibia |
| Burundi | Niger |
| Cameroon | Nigeria |
| Cape Verde | Papua New Guinea |
| Central African Republic | Rwanda |
| Chad | Saint Kitts and Nevis |
| Comoros | Saint Lucia |
| Congo | Saint Vincent and the Grenadines |
| Côte d'Ivoire | Samoa |
| Democratic Republic of the Congo | Sao Tome and Principe |
| Djibouti | Senegal |
| Dominica | Seychelles |
| Dominican Republic | Sierra Leone |
| Equatorial Guinea | Solomon Islands |
| Eritrea | Somalia |
| Ethiopia | South Africa |
| Fiji | Sudan |
| Gabon | Suriname |
| Gambia | Swaziland |
| Ghana | Togo |
| Grenada | Tonga |
| Guinea | Trinidad and Tobago |
| Guinea-Bissau | Tuvalu |
| Guyana | Uganda |
| Haiti | United Republic of Tanzania |
| Jamaica | Vanuatu |
| Kenya | Zambia |
| Kiribati | Zimbabwe |

ANNEX III

ISO standards for furniture

ISO standards for furniture

| | |
|-----------------|---|
| ISO 4211:1979 | Furniture – Assessment of surface resistance to cold liquids |
| ISO 4211-2:1993 | Furniture – Tests for surfaces – Part 2: Assessment of resistance to wet heat |
| ISO 4211-3:1993 | Furniture – Tests for surface finishes – Part 3: Assessment of resistance to dry heat |
| ISO 4211-4:1988 | Furniture – Tests for surfaces – Part 4: Assessment of resistance to impact |
| ISO 5970:1979 | Furniture – Chairs and tables for educational institutions –Functional sizes |
| ISO 7170:1993 | Furniture – Storage units – Determination of strength and durability |
| ISO 7171:1988 | Furniture – Storage units – Determination of stability |
| ISO 7172:1988 | Furniture – Tables – Determination of stability |
| ISO 7173:1989 | Furniture – Chairs and stools – Determination of strength and durability |
| ISO 7174-1:1988 | Furniture – Chairs – Determination of stability – Part 1: Upright chairs and stools |
| ISO 7174-2:1992 | Furniture – Chairs – Determination of stability – Part 2: Chairs with tilting or reclining mechanisms when fully reclined, and rocking chairs |
| ISO 8191-1:1987 | Furniture – Assessment of the ignitability of upholstered furniture – Part 1: Ignition source : smouldering cigarette |
| ISO 8191-2:1988 | Furniture – Assessment of ignitability of upholstered furniture – Part 2: Ignition source : match-flame equivalent |
| ISO 9221-1:1992 | Furniture - Children's high chairs – Part 1: Safety requirements |
| ISO 9221-2:1992 | Furniture – Children's high chairs – Part 2: Test methods |

(Source: ISO standards, 2000)

ANNEX IV

Useful addresses

1. Fairs, Exhibitions:

International Furniture Fair, Cologne
Köln Messe- und Ausstellungs GmbH
P.O. Box 210760
50532 Köln
GERMANY
Tel: +49 221 8210
Fax: +49 221 8212574
URL: <http://www.furniturefair-cologne.com>

Furniture Fair Utrecht Home & Living
Jaarbeurs Exhibitions & Media
Postbus 8500
3503 RM Utrecht
NETHERLANDS
Tel: +31 30 - 295 58 52
Fax: +31 30 - 295 58 69
E-mail: info@jaarbeursutrecht.nl
URL: <http://www.jaarbeursutrecht.nl>

Salon du Meuble de Paris
C.O.S.P.
22, avenue Franklin Roosevelt
75008 Paris
FRANCE
Tel: +33 1 41 22 02 04
Fax: +33 1 45 63 78 24
E-Mail: info-meuble@salondumeuble.com
URL: <http://www.salondumeuble.com>

Austrian Trade Fair for Furniture
Österreichische Möbelfachmesse
Am Messezentrum 6 - Postfach 285
5021 Salzburg
AUSTRIA
Tel: +43 662/44 77 271
Fax +43 662/44 77 210
E-Mail: info@reedexpo.at
URL: <http://www.reedexpo.at>

Brussels International Furniture Fair (SIMB)
Date: November
Brussels
BELGIUM
Tel: +32 2 4215370
Fax: +32 2 4215380

2. Publications, Press

France

Le Courrier du Meuble et de l'Habitat
Editions du Tigre
23, rue Joubert
75009 Paris
Tel: +33 1 48745250
Fax: +33 1 40164365
E-mail: meuble@imagnet.fr

Revue de l'Ameublement
Editions du Tigre S.A.R.L.
23, rue Joubert
75009 Paris
Tel: +33 1 48745250
Fax: +33 1 40164365

Art et Décoration
Editions Charles Massin et Cie
16-18 rue de l'Amiral Mouchez
75686 Paris Cedex 14
Tel: +33 1 45654848
Fax: +33 1 45654700
URL: <http://www.art-decoration.fr>

Annuaire de l'Ameublement
(Directory of French Furniture Trade)
Alphamédian
38 bd. Henri Sellier
92156 Suresnes Cedex
Tel: +33 1 47287070
Fax: +33 1 47287245

Germany

Möbelmarkt

Verlag Matthis Ritthammer GmbH
P.O. Box 3850
90411 Nürnberg
Tel: +49 911 955780
Fax: +49 911 9557811
E-mail: media@ritthammer.verlag.de
URL: <http://www.mobelmarkt.de>

Möbel - Kultur

Ferdinand Holzmann Verlag GmbH
P.O. Box 601049
222210 Hamburg
Tel: +49 40 6320180
Fax: +49 40 6307510
E-mail: holzmann@lav.de
URL: <http://www.mobelkultur.de>

Euwid

Euwid GbmH
Bleichstrasse 20-22
76593 Gernsbach
Tel: +49 7224 93970
Fax: +49 7224 939780

The Netherlands

Meubel

P.O. Box 43250
2504 AG The Hague
Tel: +31 70 3218218
Fax: +31 70 3298744

Mobilia

P.O. Box 15341
1001 MH Amsterdam
Tel: +31 20 6206934
Fax: +31 20 6206954

Wonen / CBW

Boveweg 100
3708 AG Zeist
Tel: +31 30 6973100
Fax: +31 30 6919751

Ons Huis / Taurus

P.O. Box 13060
3507 LB Utrecht
Tel: +31 30 2313520
Fax: +31 30 2311872

United Kingdom

Furnishing

DMG Home Interest Magazines Ltd.
Times House
Station Approach - Ruislip
Middlesex HA4 8NB
United Kingdom
Tel: +44 1895 677677
Fax: +44 1895 676027

Cabinet Maker and *Furniture Today* have their editorial company based in the USA.

Cabinet Maker

Chartwell Communications, Inc.
380 E. Northwest Highway, Suite 300
Des Plaines, IL 60016-2208
United States
Tel: +1 847 3906700
Fax: +1 847 3907100
E-mail: pwade@unmf.com
URL: <http://www.chartcomm.com>

Furniture Today

P.O. Box 2754
High Point N.C. 27261-2754
United States
Tel: +1 336 6050121
Fax: +1 336 6051143
E-mail: bcarroll@cahners.com
URL: <http://www.furnituretoday.com>

3. Standards Organizations

International Organization for Standardization (ISO)

P.O. Box 56
CH-1211 Geneva
SWITZERLAND
Tel: + 41 22 749 01 11
Fax: + 41 22 733 34 30
E-mail: central@iso.ch
URL: <http://www.iso.ch>

European Committee for Standardization (CEN)

Unit Developing countries
Rue de Stassart 36
B-1050 Brussels
BELGIUM
Tel: +32 2 5500811
Fax: +32 2 55 00 819
URL: <http://www.cenorm.be>

**Dutch Standards Organisation
Ned. Normalisatie Instituut (NNI)**

P.O. Box 5059
26000 GB Delft
THE NETHERLANDS
Tel: +31 15 2690390
Fax: +31 15 2690190
URL: <http://www.nni.nl>

**Österreichisches Normungsinstitut
(ON) - Austria**

P.O. Box 130
1021 Vienna 2
AUSTRIA
Tel: +43 222 267535
Fax: +43 222 267552
URL: <http://www.ibn.be>

Institut Belge de Normalisation (IBN)

Av. De la Brabanconnelaan
B- 1040 Brussels
BELGIUM
Tel: +32 2 7349205
Fax: +32 2 7334264
URL: <http://www.ibn.be>

**Association Française de Normalisation
(AFNOR)**

Tour Europe- Cedex 7
92080 Paris la Defense
FRANCE
Tel: +33 1 42915555
Fax: +33 1 42915656
URL: <http://www.afnor.fr>

**Deutsches Institut für Normung eV
(DIN)**

P.O. Box 1107
D-1000 Berlin 30
GERMANY
Tel: +49 30 26012260
Fax: +49 30 26011231
URL: <http://www.din.de>

British Standards Institution (BSI)

2 Park Street
London W1A 2BS
UNITED KINGDOM
Tel: +44 20 76299000
Fax: +44 20 76290506
URL: <http://www.bsi.org.uk>

4. Furniture Associations:

European Furniture Manufacturers Federation (UEA)

Rue Royale 109-111
B-1000 Brussels
Belgium
Tel: + 32 2 2181889
Fax: + 32 2 2192701
E-mail: secretariat@uea.be
URL: <http://www.ueanet.com>

Federal Association of Furniture Retailers (Fédération Nationale du Négoce de l'ameublement)

59 rue Saint-Lazare
75009 Paris
FRANCE
Tel: + 33 1 42858755
Fax: + 33 1 42806884

British Furniture Manufacturers Ltd (BFM)

30 Harcourt St,
London, W1H 2AA
UNITED KINGDOM
Tel: + 44 20 7724 0851
Fax: + 44 20 7706 1924
EMail: info@bfm.org.uk
URL: <http://www.bfm.org.uk>

Federation Association of the German Furniture & Trade

Frangenhelmstrasse 6
50931 Köln 41
GERMANY
Tel: + 49 221 403142
Fax: + 49 221 4009396

Association of Furniture Retailers Centraal Branchevereniging Wonen

P.O. Box 102
3720 AC Bilthoven
NETHERLANDS
Tel: + 31 30 2286341
Fax: + 31 30 2286264

Federal Association of Furniture Retailers (Bundesgremium des Möbelhandels)

Wiedme Hauptstrasse 63
A-1045 Vienna
AUSTRIA
Tel: + 43 1 501053322
Fax: + 43 1 50206287

Brussels International Trade Mart (NAVEM)

P.O. Box 613
1020 Brussels
BELGIUM
Tel: + 32 2 4784716
Fax: + 32 2 4783766

5. Trade Promotion Organizations

Centre for the Promotion of Imports from developing countries (CBI)

P.O. Box 30009
NL - 3001 DA Rotterdam
THE NETHERLANDS
Tel: + 31(0)10 201 34 34
Fax: + 31(0)10 411 40 81
E-mail: cbi@cbi.nl
URL: <http://www.cbi.nl>

Austrian Federation Economic Chamber (WKO)

Wiedner Hauptstrasse 63
P.O. Box 150
A- 1045 Vienna
AUSTRIA
Tel: + 43 1 501054403
Fax: + 43 1 50105255
E-mail: mayrw@aw.wk.or.at
URL: <http://www.wk.or.at>

**Centre Français du Commerce
Extérieur (CFCE)**
Information Centre
10, Avenue d'Iéna
75016 Paris Cedex
FRANCE
Tel: +33-1-4073-3128
Fax: +33-1-4073-3748
E-mail: lauredemondragon@cfce.fr
URL: <http://www.cfce.fr>

**Federal Office of Foreign
Trade Information (BFAI)**
Agrippastrasse 87-93
50445 Cologne
GERMANY
Tel: +49 221 20570
Fax: +49 221 2057275
E-mail: westeuropa@bfai.com
URL: <http://www.bfai.com>

ANNEX V

List of selected Importers (non-exhaustive)

AUSTRIA

Bauhaus Ges. MbH
Straubinger Strasse 25
4600 Wels
Tel: +43 72426250
Fax: +43 7242625102

Kika Möbelhandelsges. MbH
Anton- Scheibling-Gasse 1
3100 St. Pölten
Tel: +43 274271626
Fax: +43 274280554

BELGIUM

Casa
Rue Neuve, 123-321
1000 Brussels
Tel: +32 2 2192681

Furniture of Fashion B.V.B.A.
Industrieweg 13
3190 Boortmeerbeek
Tel: +32 16 607060
Fax: +32 16 608445

Gamma België
Amsterdamstraat 18
2000 Antwerpen
Tel: +32 3 2025300
Fax: +32 3 2025301

Makro NV
Bisschoppenhoflaan 643
2100 Deurne
Tel: +32 3 3600611
Fax: +31 3 3600731

Orga CV
Sterrewegel 7
1933 Sterrebeek
Tel: +32 2 7314656
Fax: +32 2 7319982

FRANCE

But International (Contact: Mr Emerian)
1 avenue Spinosa,
ZAC de Malnoue, Emerainville
77437 Marne la Vallée Cedex 2
Tel: +33 1 64612626
Fax: +33 1 64617226

Collectania
168 rue de Rivoli
75001 Paris
Tel: +33 1 44505500
Fax: +33 1 42961601

S.A. Meubles Reverdy
Rue des Blattiers
71160 Digoin
Tel: +33 3 85534848
Fax: +33 3 85537000

Iguane S.A.R.L.
72 rue des fusillés
59160 Capinghem
Tel: +33 3 20092026
Fax: +33 3 20228900

Habitat has its buying department based in the UK for every European country.

Habitat (Buying Group)
Buying Department for all Europe
Tottenham Court Road 196
W1P9LD London
United Kingdom
Tel: +44 20 72552545
Fax: +44 20 72556065

GERMANY

Atlas Einrichtungs Einkaufs GmbH
Brunhofstrasse 2
45470 Mülheim a.d. Ruhr
Tel: +49 208 992400
Fax: +49 208 9924099

Futonia GmbH
Stresemannstrasse 232-238
22769 Hamburg
Tel: +49 40 85605558
Fax: +49 40 8507032

Intersol Handelsgesellsch MbH
IM Stuhbusch 38
21640 Nottensdorf
Tel: +49 41632866
Fax: +49 41637880

Lambert GmbH & Co. K.G.
Konstantinstrasse 303
41238 Monchengladbach
Tel: +49 2166 86830
Fax: +49 2166 86585

VME Vereinigte Möbel-Einkaufs GmbH & Co.
An der Wesebreede 2
33699 Bielefeld 18
Tel: +49 521 208850
Fax: +49 521 2088511

NETHERLANDS

Bergers Interieurs BV
Postbus 107
2650 AC Berkel en Rodenrijs
Tel: +31 10 5115133
Fax: +31 10 5116302

Habufa Meubelen BV
Postbus 10
5527 ZG Hapert
Tel: +31 497 389999
Fax: +31 497 382876

Hamefa Furniture BV
Duiveland 3
1948 RB Beverwijk
Tel: +31 251 220351
Fax: +31 251 221455

Interieur Nederland
Noorderlaan 11c
2182 GZ Heemstede
Tel: +31 55 5430328
Fax: +31 55 5420881

Jami BV
Postbus 115
5480 AC Schijndel
Tel: +31 73 5492340
Fax: +31 73 5474525

Modirama Imports BV
Zuidhollandsedijk 185
5171 TM Kaatsheuvel
Tel: +31 416 272315
Fax: +31 416 273742

Roos Tucker Meubelen

Postbus 55
6350 AB Leek
Tel: +31 594 516017
Fax: +31 594 512962

Select Norm BV

Postbus 60
5000 AB Tilburg
Tel: +31 13 4609400

Woodline BV

Het Haagje 132
7906 AD Hoogeveen
Tel: +31 528 275332
Fax: +31 528 274936

UNITED KINGDOM**Baker & Stonehouse LTD**

Marsh street, Cannon Park
TSH1 5JH Middlesbrough, Cleveland
Tel. +44 1642 230988
Fax: +44 1642 219623

Coexistence

288 Upper Street
N1 2TZ London
Tel: +44 20 73548817
fax: +44 20 73549610

Courts Furnishers PLC.

The Grange, 1 Central Road
SM4 5RX Morden
Tel: +44 20 86403322
Fax: +44 20 85287505

Furniture Traders

Maskreys Limited 116-120
Whitchurch Road
CF4 3YL Cardiff, South Glamorgan
Wales
Tel: +44 29 20 229371
Fax: +44 29 20 388022

Homebase LTD

Beddington House, Railway Approach
SM6 0HB Wallington Surrey
Tel: +44 171 7311279
Fax: +44 171 7363522

Horn, Simon Furniture LTD

117-121 Wandsworth Bridge Road
SW6 2TP London
Tel: +44 20 77311279
Fax: +44 20 77363522

John Lewis Partnership

171 Victoria street
W1A 1EX London - England
Tel: +44 20 78281000

SOURCE OF INFORMATION

- International Trade Centre UNCTAD/WTO (ITC), <http://www.intracen.org>
- COMTRADE, United Nations Statistics Division (UNSD), <http://www.un.org/Depts/unsd/>
- International Directory of Importers, 1998
- European Furniture Manufacturers Federation (UEA), <http://www.ueanet.com>
- International Organization for Standardization (ISO), <http://www.iso.ch>
- European Committee for Normalization (CEN), <http://www.cenorm.be>
- Centre for the Promotion of Imports from Developing Countries (CBI), <http://www.cbi.nl>
- Centre for Industrial Studies (CSIL Milano), <http://www.csilmilano.com>
- British Furniture Manufacturers Association (BFM), <http://www.bfm.org.uk>
- "Manual on the Packaging of Furniture", ITC
- "Rubberwood, a study of the world development potential", ITC
- "Secondary Processed Wood Products", ITC
- Worldtariff, 2000

EVALUATION FORM

Wooden Household Furniture OVERVIEW OF THE EUROPEAN MARKET

| | | | | | | | | | |
|--|--------------------|----------------------|-------------------|---|---|---|---|---|---|
| 1. PLEASE INDICATE HOW THIS BRIEF WAS OF USE TO YOUR ENTERPRISE.. | <i>Very useful</i> | <i>Fairly useful</i> | <i>Not useful</i> | | | | | | |
| <i>Overall rating of this market brief</i> | | | | | | | | | |
| <i>For taking marketing decisions</i> | | | | | | | | | |
| <i>For establishing market contacts</i> | | | | | | | | | |
| <i>For market research</i> | | | | | | | | | |
| <u>Comments</u> (use reverse side, if necessary): | | | | | | | | | |
| 2. PLEASE INDICATE WHICH SECTIONS OF THIS MARKET BRIEF WERE THE MOST USEFUL. (Ranking :1 = most useful to 9 = least useful) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| <i>a) Market characteristics</i> | | | | | | | | | |
| <i>b) Market access</i> | | | | | | | | | |
| <i>c) Prices</i> | | | | | | | | | |
| <i>d) Packaging</i> | | | | | | | | | |
| <i>e) Distribution channels</i> | | | | | | | | | |
| <i>f) Market prospects</i> | | | | | | | | | |
| <i>g) Useful addresses</i> | | | | | | | | | |
| <i>h) List of importers</i> | | | | | | | | | |
| <i>i) Statistics</i> | | | | | | | | | |
| 3. WHAT OTHER MARKET ASPECTS SHOULD BE COVERED? | | | | | | | | | |
| 4. WHAT IMPORT MARKETS ARE OF PARTICULAR INTEREST TO YOU? | | | | | | | | | |
| 5. WHAT PRODUCTS WOULD YOU LIKE COVERED IN THE FUTURE | | | | | | | | | |

(Please turn over)

| | |
|------------------------|-----------------|
| <i>NAME:</i> | |
| <i>TITLE:</i> | |
| <i>COMPANY:</i> | |
| <i>STREET ADDRESS:</i> | |
| <i>POSTAL ADDRESS:</i> | |
| <i>CITY:</i> | <i>COUNTRY:</i> |
| <i>TEL:</i> | <i>FAX:</i> |
| <i>SIGNATURE:</i> | <i>DATE:</i> |

| |
|----------------------------|
| <i>ADDITIONAL COMMENTS</i> |
|----------------------------|

Please return this evaluation form to :

*BUSINESS INTELLIGENCE SUPPORT SERVICE (BISS)
INTERNATIONAL TRADE CENTRE UNCTAD/WTO
PALAIS DES NATIONS
CH-1211 GENEVA 10
SWITZERLAND*

*FAX: +(41 22) 733 44 39
+(4122) 730 05 77*