

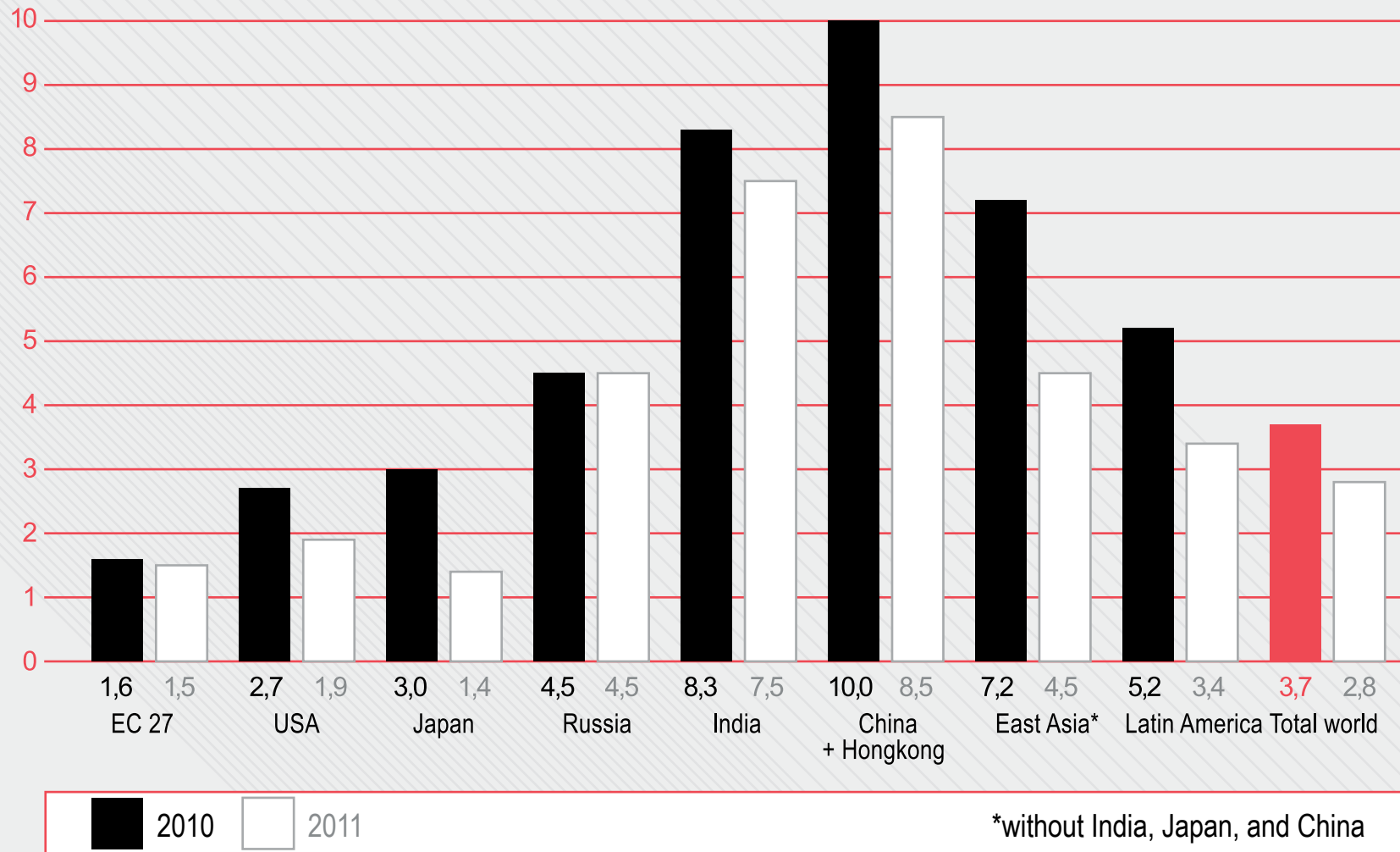


STATISTICS FOR THE FURNITURE INDUSTRY AND TRADE

Möbel Zahlen Daten

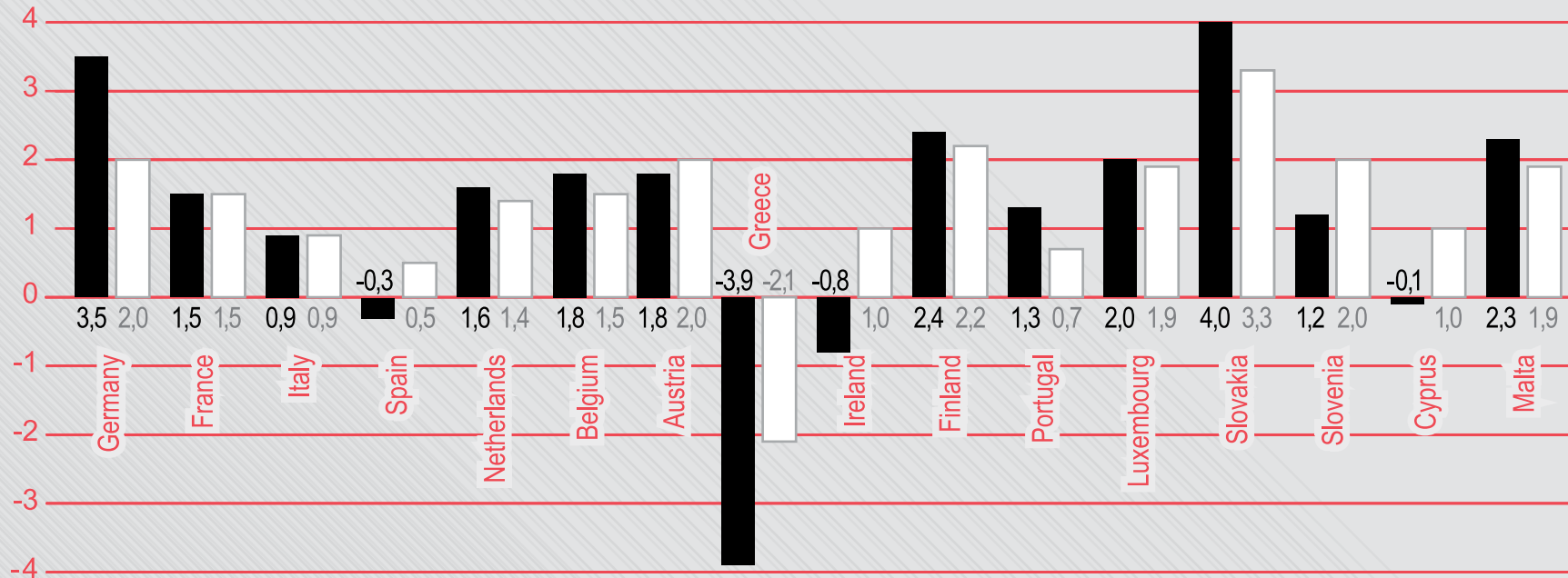
ECONOMICAL GROWTH IN THE REGIONS OF THE WORLD-ECONOMY

Changes of the gross domestic product (GDP) compared to the last year in %



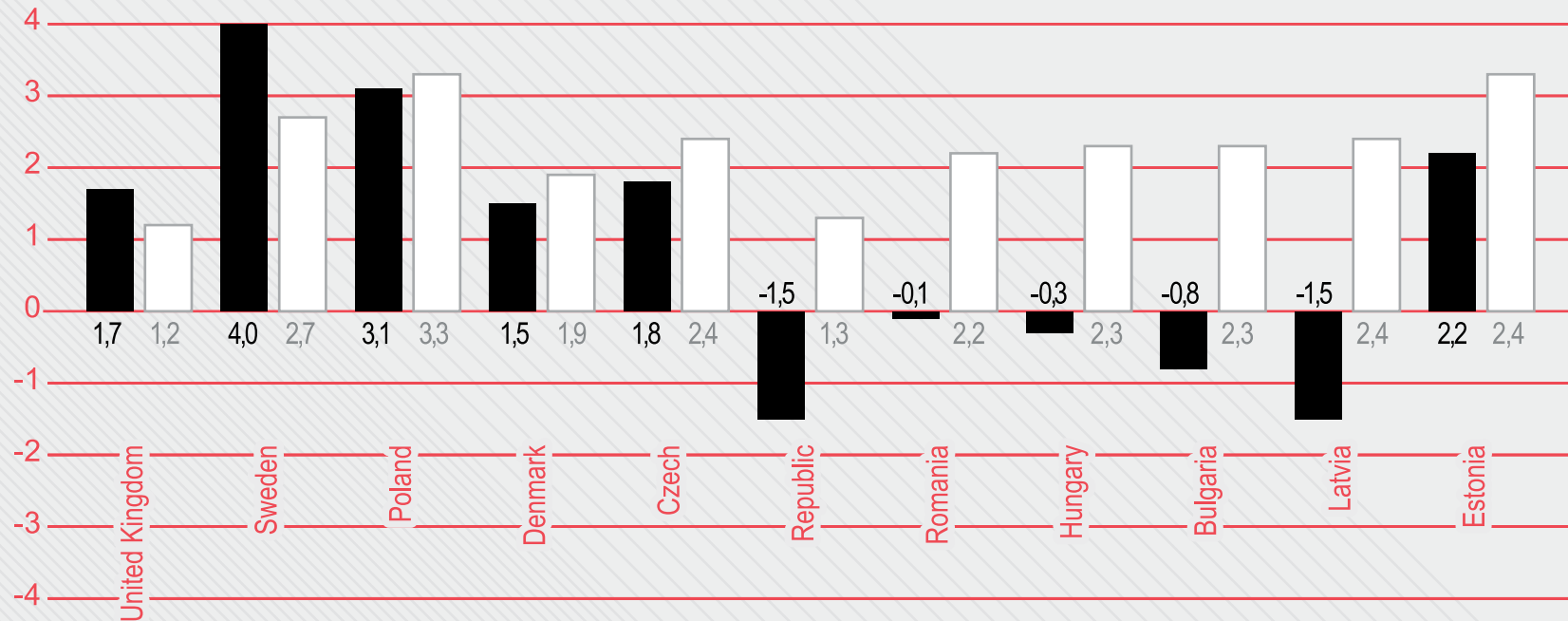
IN THE REGIONS OF THE EURO

Changes of the gross domestic product (GDP) compared to the last year in %



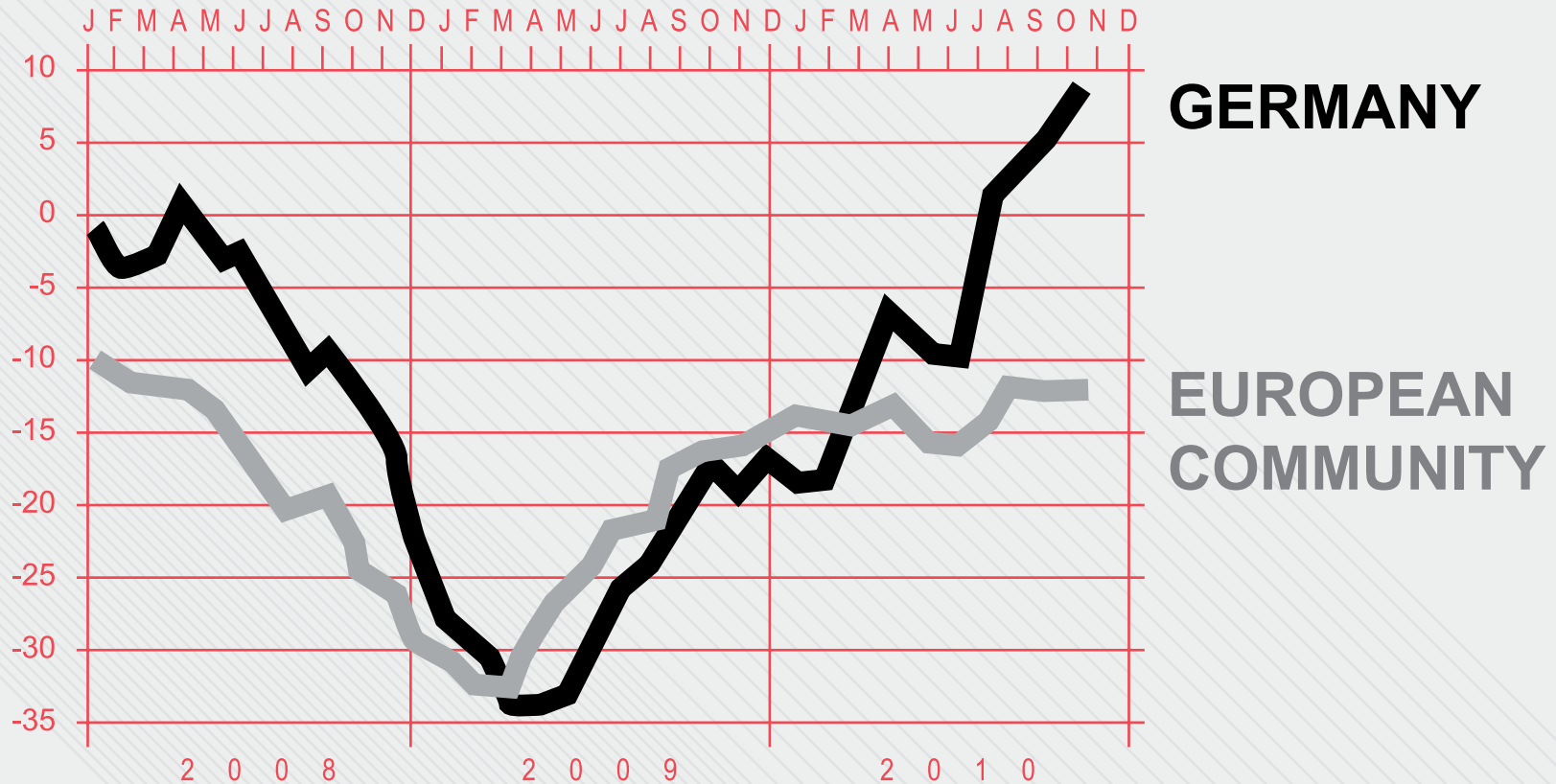
ECONOMICAL GROWTH OTHER THE OTHER EC-MEMBER STATES

Changes of the gross domestic product (GDP) compared to the last year in %



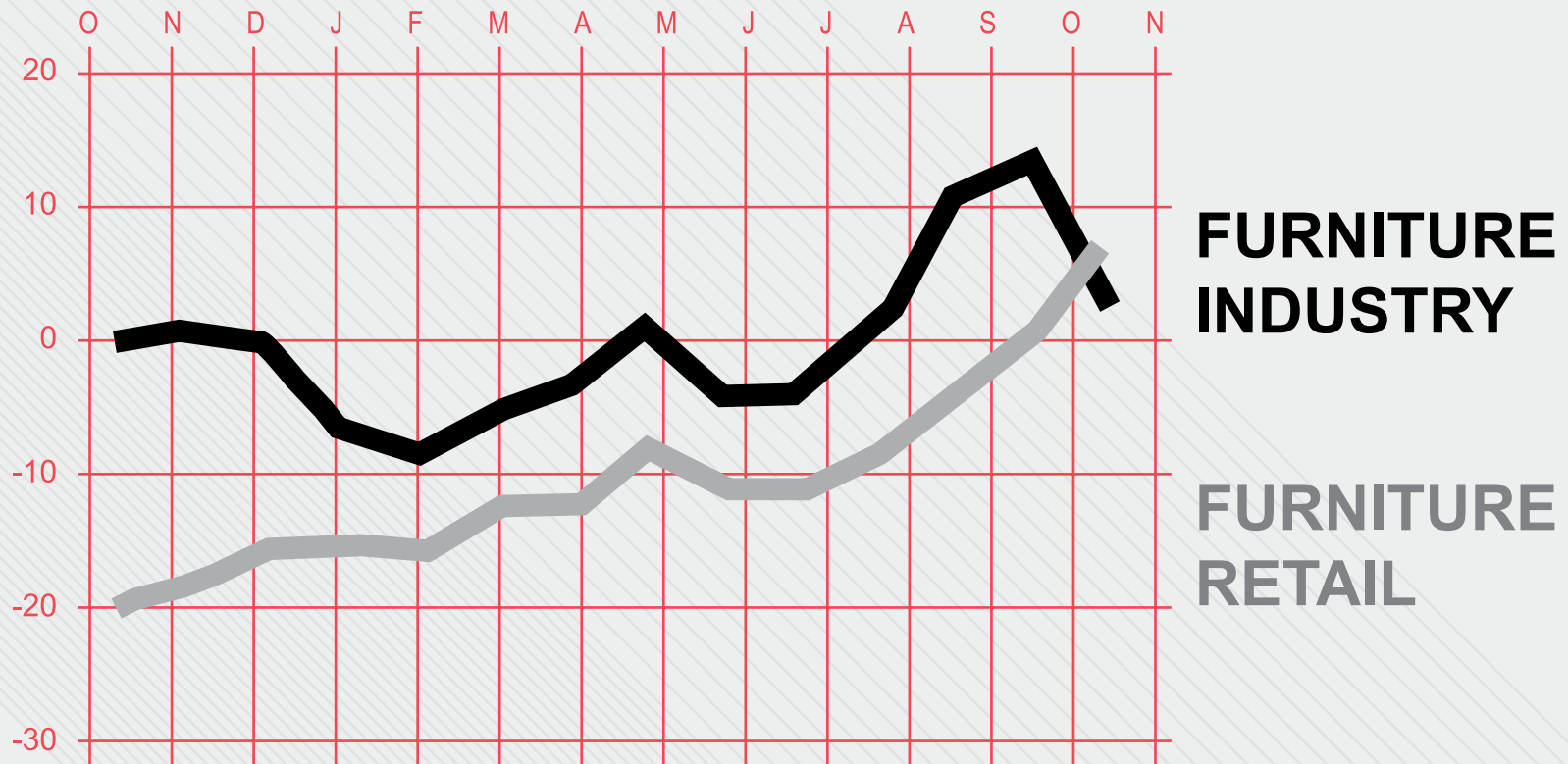
MOOD OF THE CONSUMERS IN THE EC AND IN GERMANY*

How the consumers judge their situation



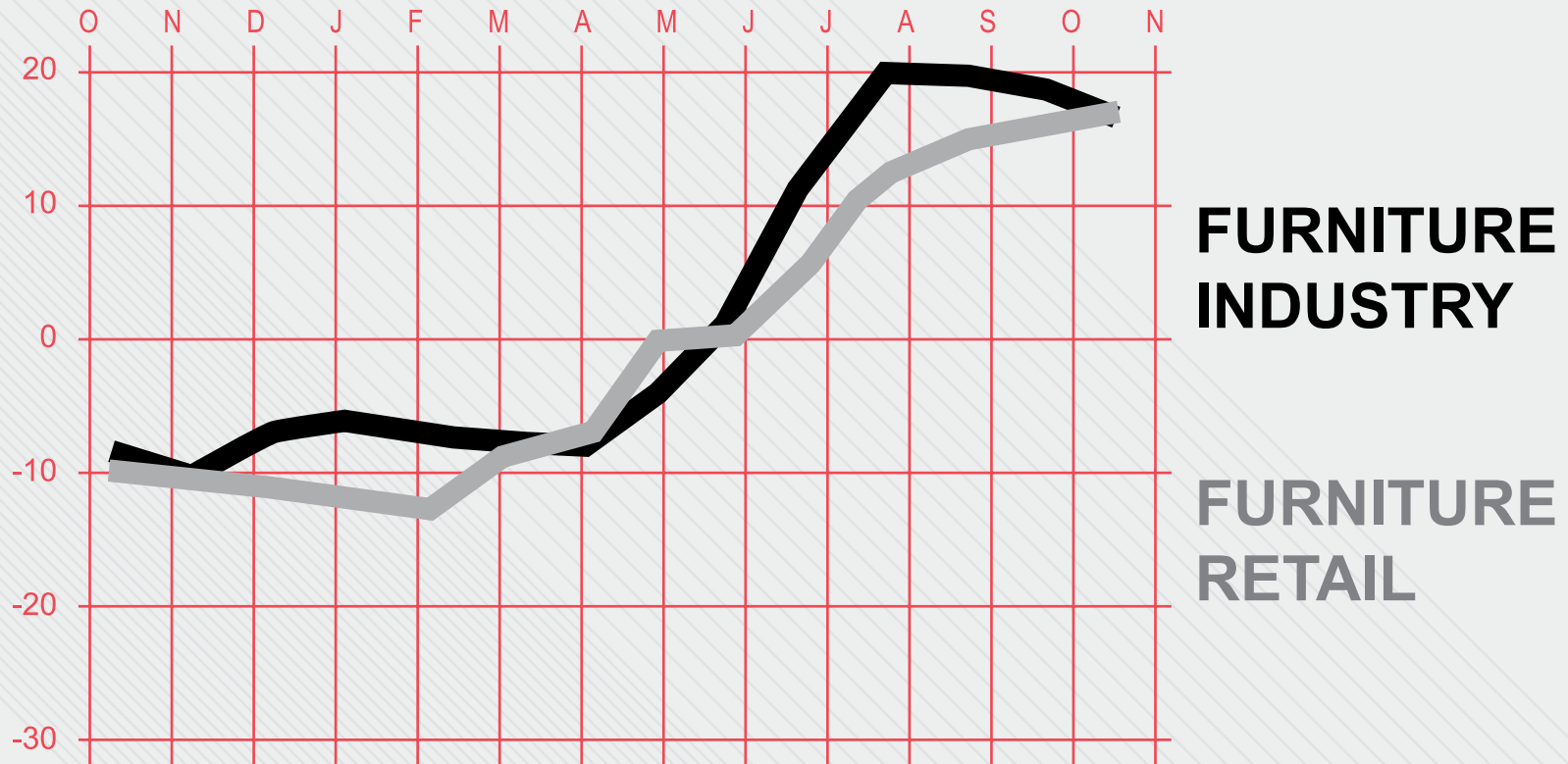
*based on information about financial and economical situation, expectation of unemployment, and the savings

BUSINESS SITUATION



* Above the 0-line = positive Below the 0-line = negative

BUSINESS SITUATION



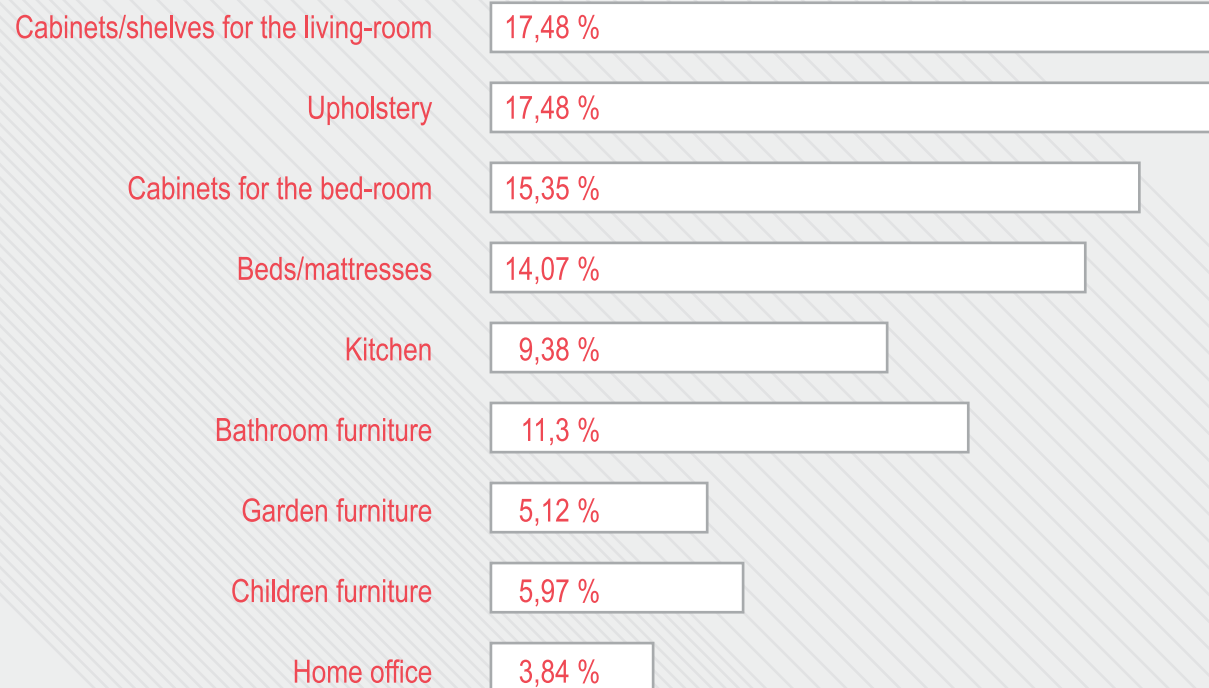
* Above the 0-line = positive Below the 0-line = negative

MARKET VOLUME IN BILLIONS EURO



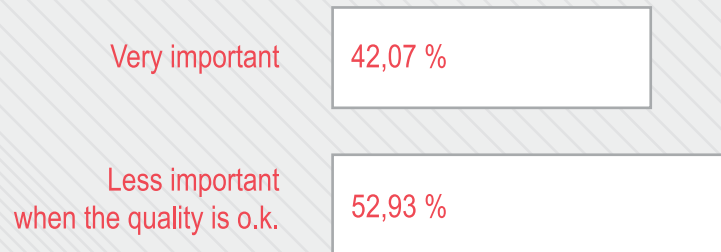
THE PRICE IS (STILL) VERY IMPORTANT

Which furniture is on top of the shopping list?

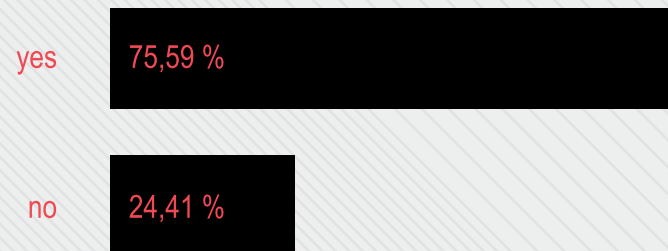


HOW IMPORTANT IS “SOLID WOOD” WHEN CHOOSING FURNITURE?

Which furniture is on top of the shopping list?

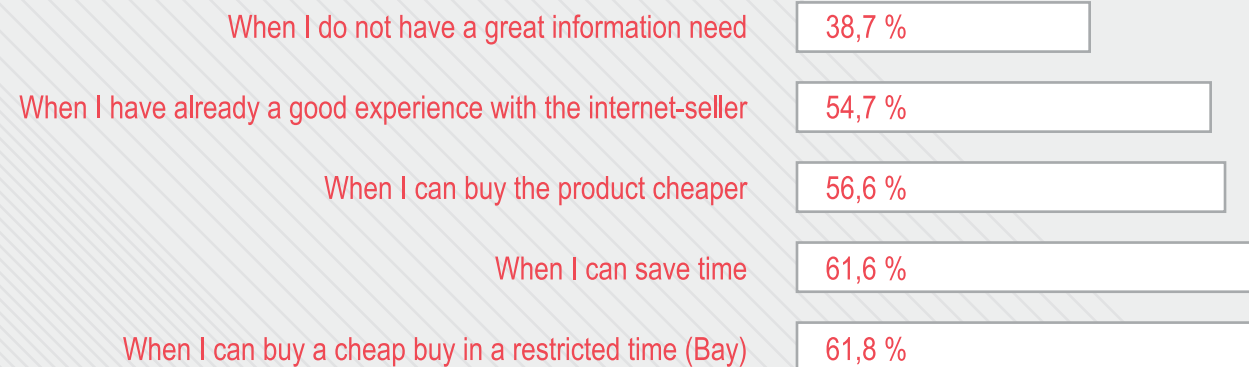


WHEN I AM BUYING FURNITURE, I KEEP AN EYE ON THE PRICE



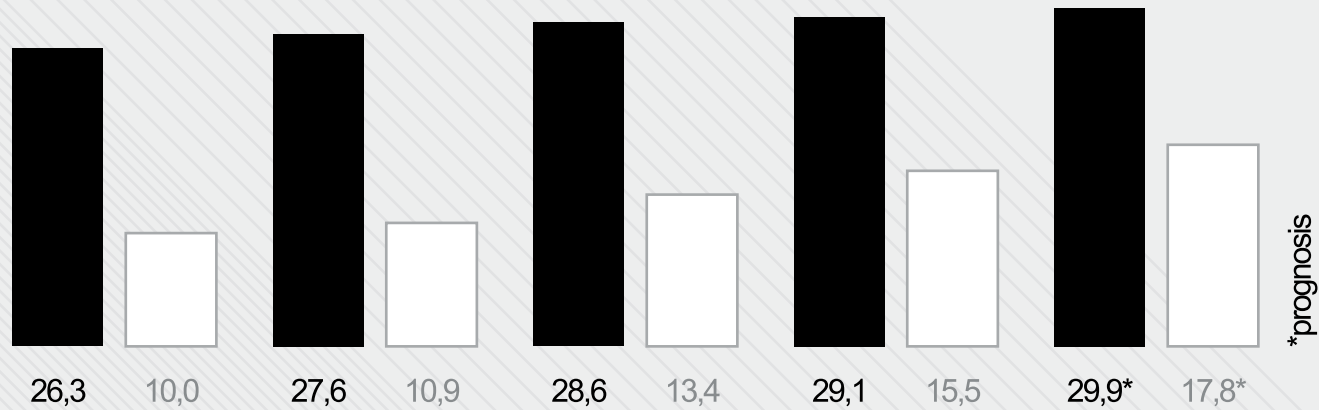
THE TEMPTATION OF THE INTERNET

When do buy a product rather in the internet?

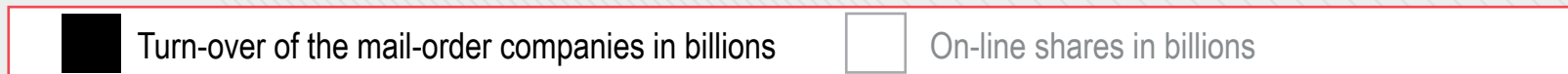


E-COMMERCE IS RATED HIGH

The on-line trade is growing and growing



In 2009 the furniture on-line sales reached a share of 11% (1.705 Bill. Euro)



THE DISTRIBUTION CHANNELS OF FURNITURE 2009

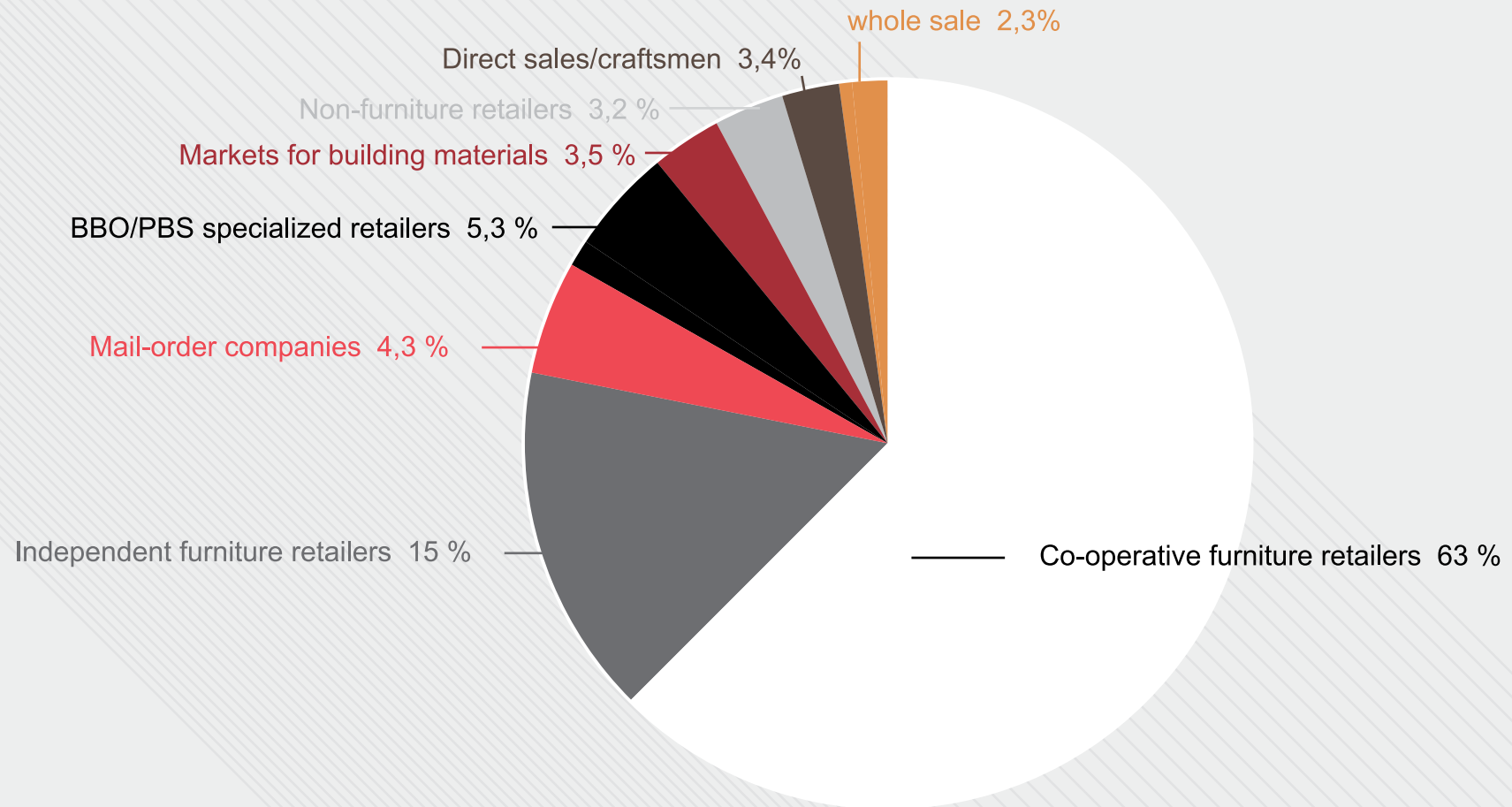
Supply of the domestic market (prices of the manufacturers) 17.222 mill. Euro

3,1 %	2,7 %		37,6 %					56,6 %		
	Whole sale Whole sale		Buying Co-operatives of the Furniture Retail							
	80 %	20 %						100 %		
		0,6 %	39,5 %					59,9 %		
	Contract business		Total retail business							
			DIY Markets	Self-service department stores	Office furniture retail	Mail-order companies	Retail of technical products	Department stores	Furniture retail	Others
3,4 %	2,3 %		3,5 %	1,2 %	5,3 %	4,3 %	1,0 %	0,1 %	78 %	0,9 %

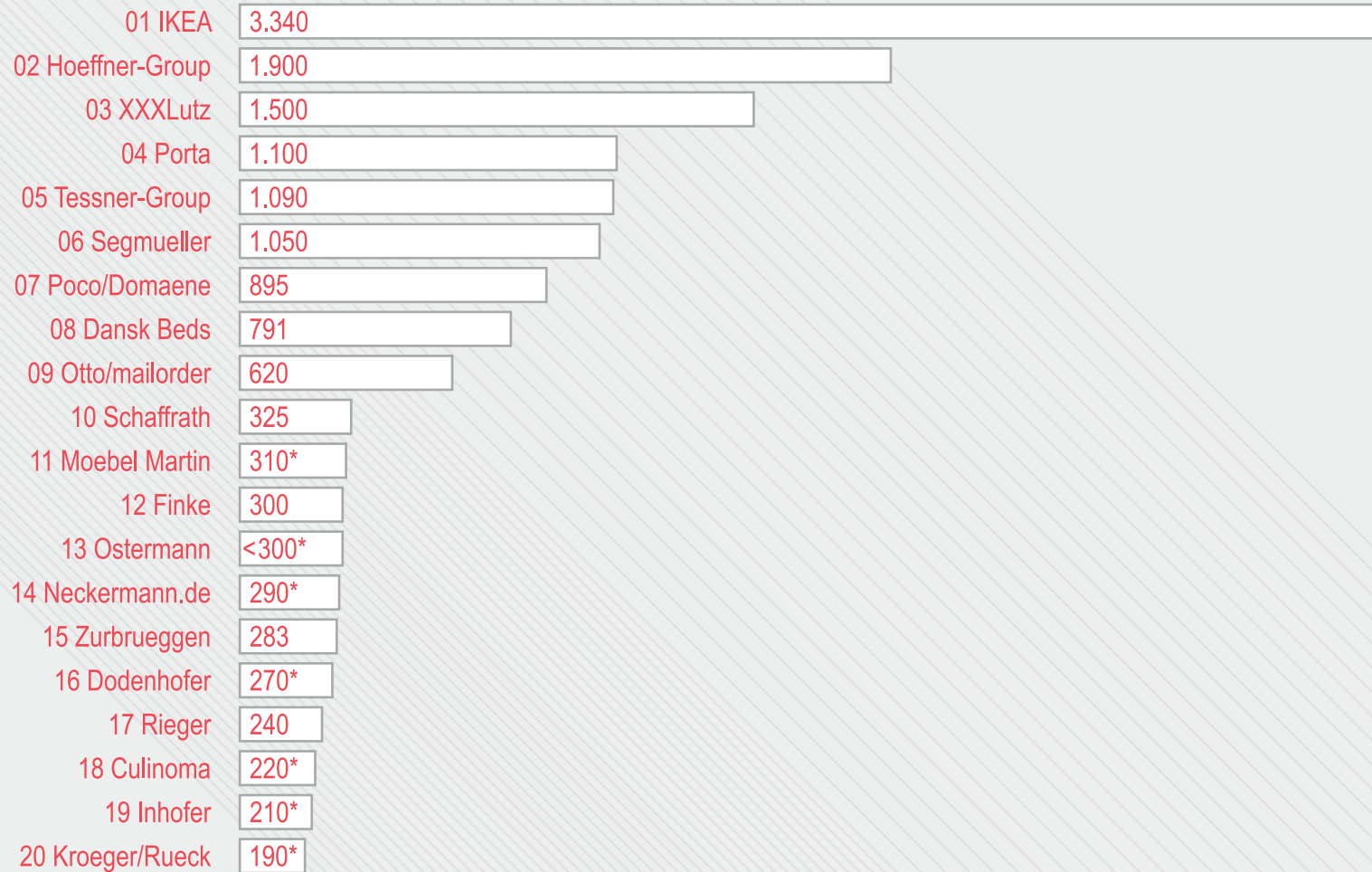
EuroMarket volume (retail prices)	29.370 Bill. €
of this private consumption	26.900 Bill. €
of this commercial needs	2.470 Bill. €

<div style="display: inline-block; width: 15px; height: 15px; background-color: black; margin-right: 5px;"></div> Turn-over of the mail-order companies in billions	<div style="display: inline-block; width: 15px; height: 15px; border: 1px solid black; margin-right: 5px;"></div> On-line shares in billions
---	--

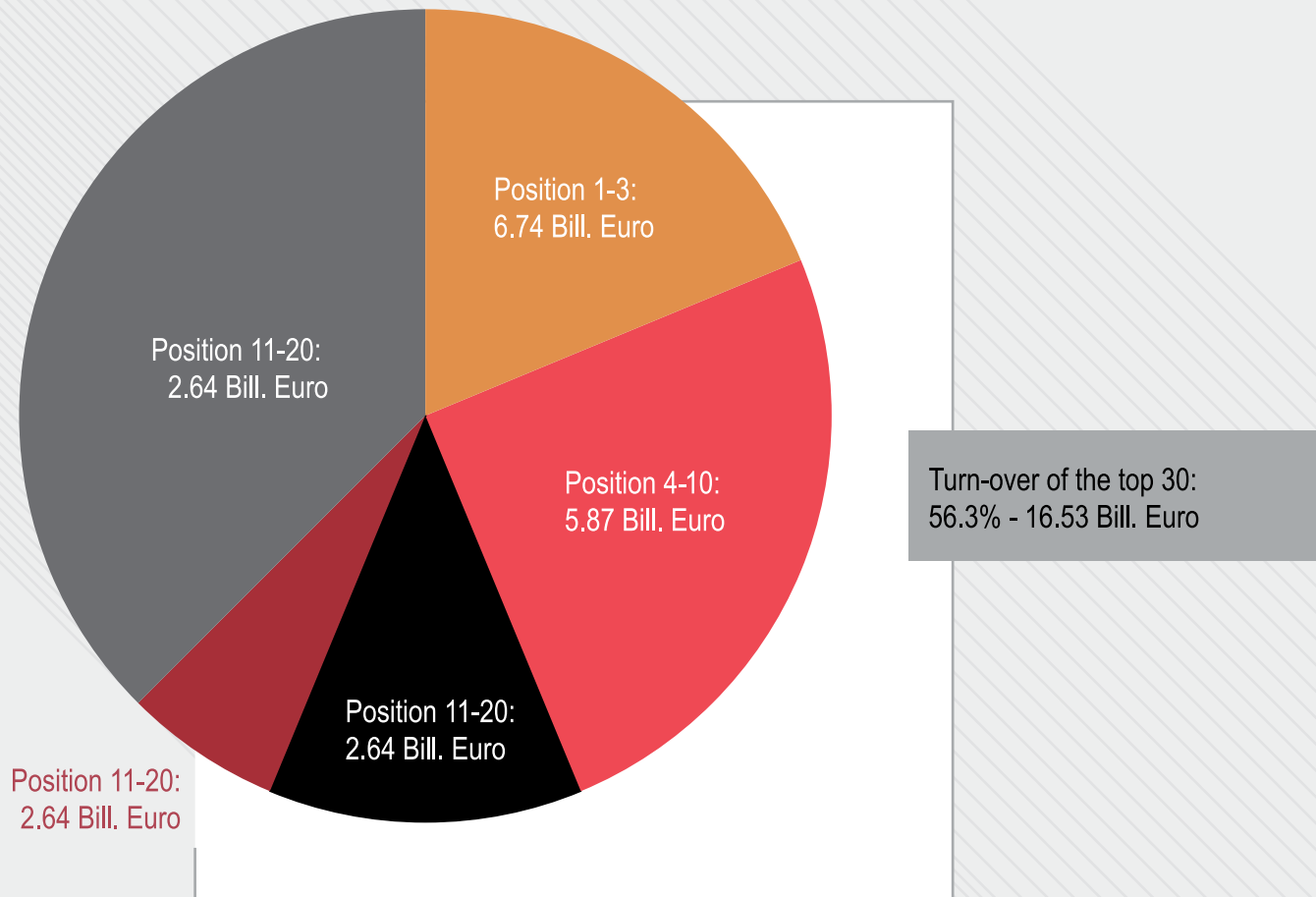
MARKET SHARES OF THE VARIOUS SALES CHANNELS



THE TOP 20 OF THE FURNITURE RETAIL

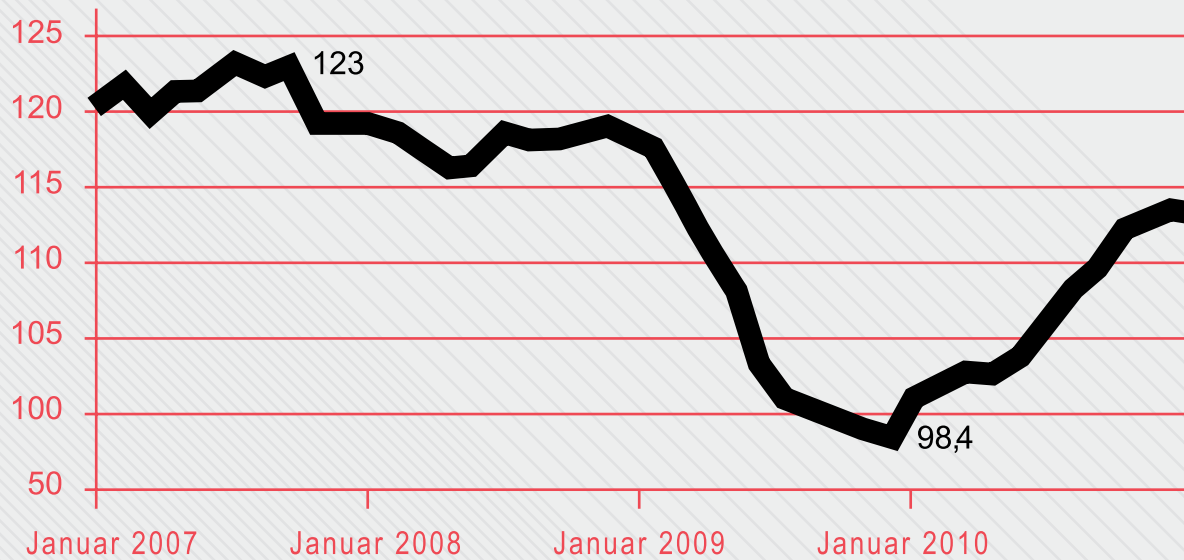


2009 MARKET SHARES OF THE RETAIL-CHANNELS: TOTAL TURN-OVER 29.37 BILL. EURO



Costs of Materials

ALUMINUM IS NOT ANYMORE CHEAP



Index of producer-prices 2005 = 100%

Producer prices July 2010: +15%

Costs of Materials

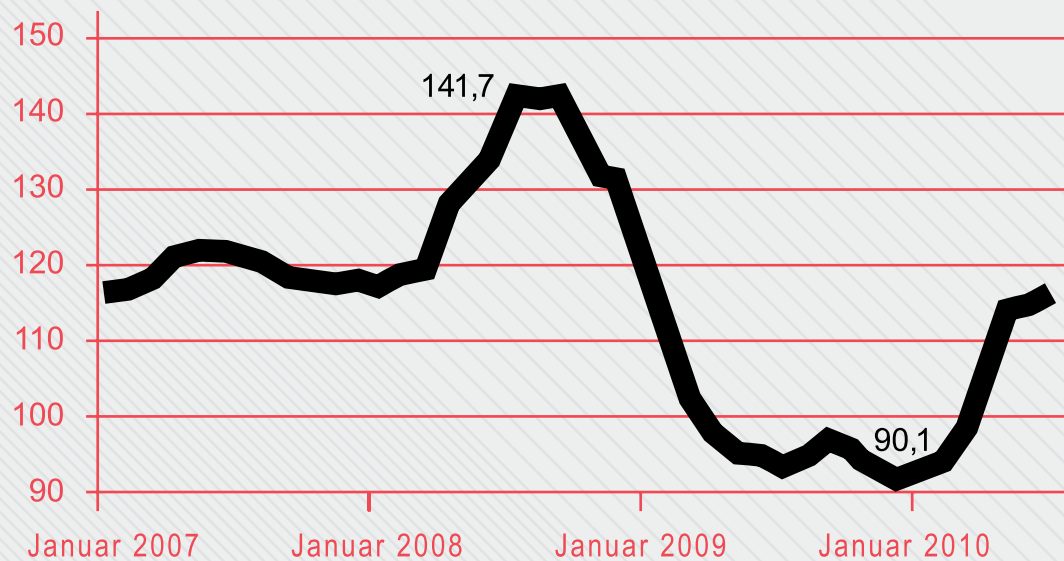
COSTS FOR PLASTICS ARE CLIMBING UP



■ Plastixx (Polymer-Index)

Costs of Materials

COSTS FOR STEEL ARE CLIMBING UP



Remarks:

Just in a year the prices of all materials needed for the furniture production scored up:

Wood products 5,5%

Particle board 7.1%

Sawn timber 20.3%

Plastic laminates and profiles 6.4.%

Foam materials 8.5%

Adhesives 4.2%

Paper packaging 6.9%

Leather 25%

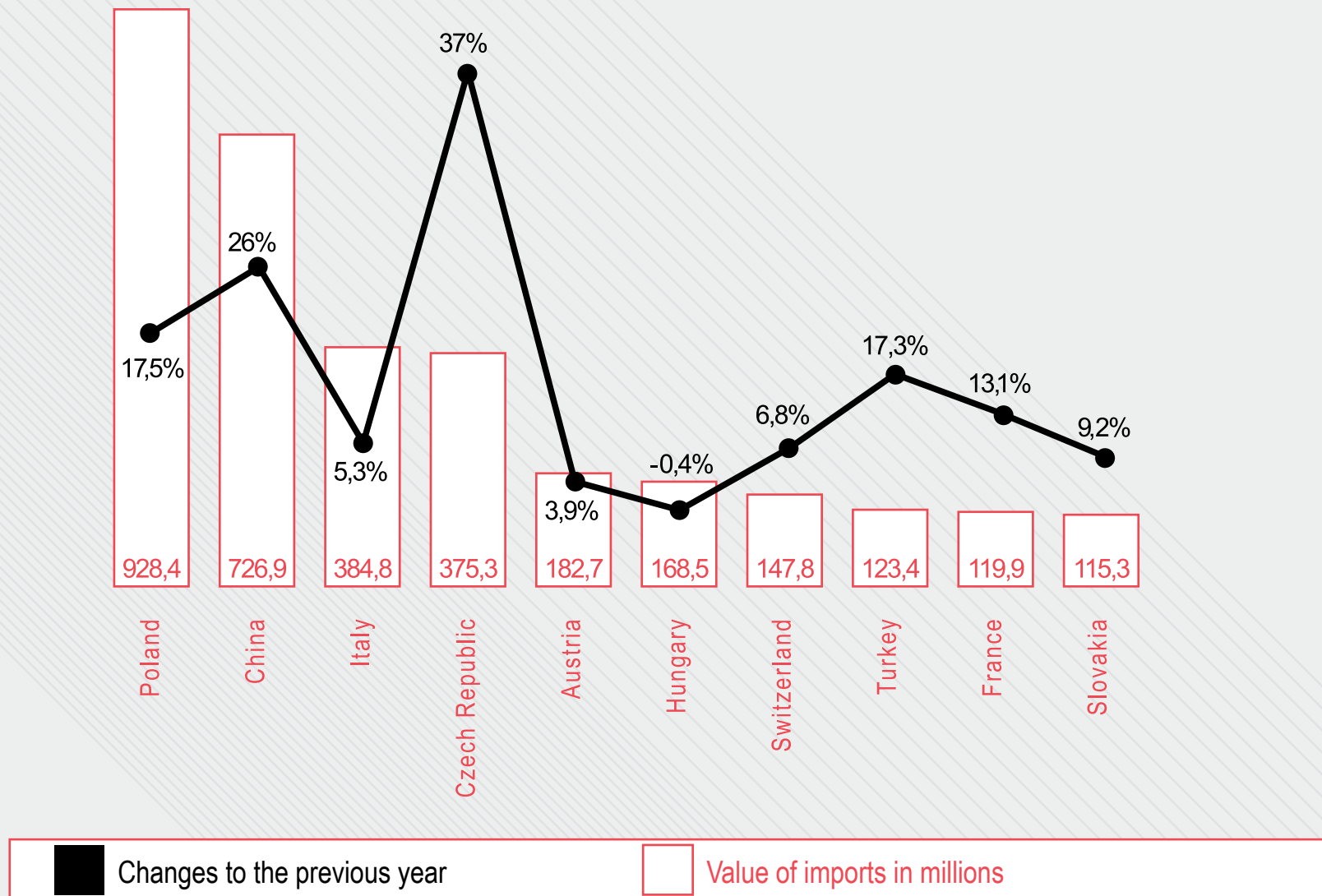
Steel (July 2010) 30 – 40%

Index of producer-prices 2005 = 100%

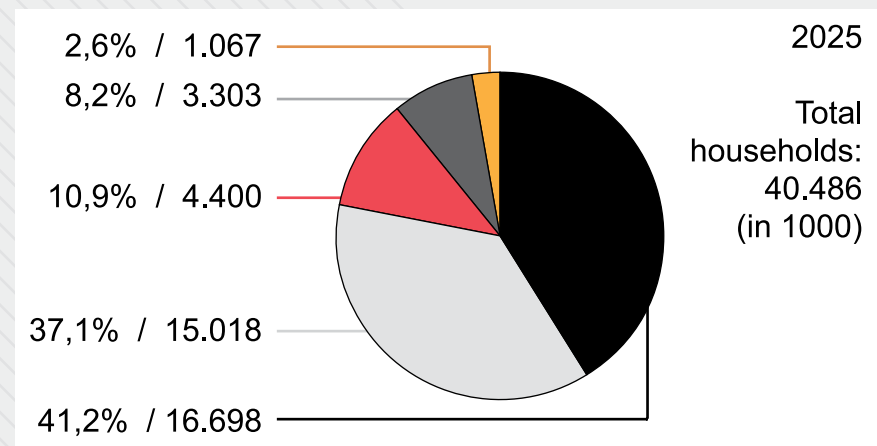
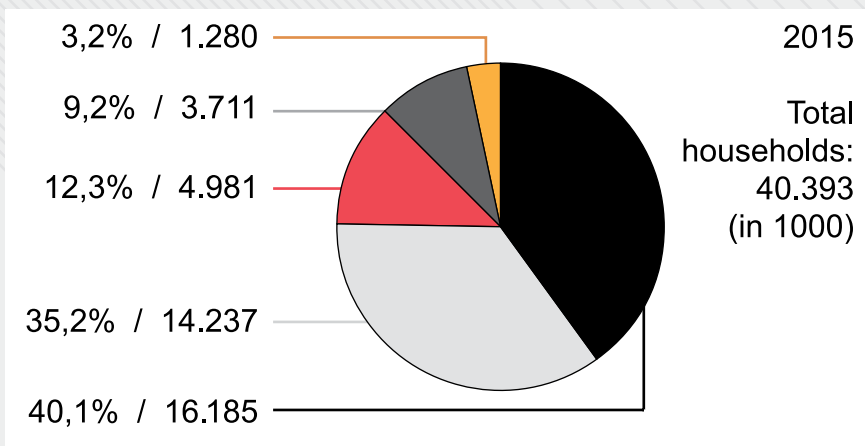
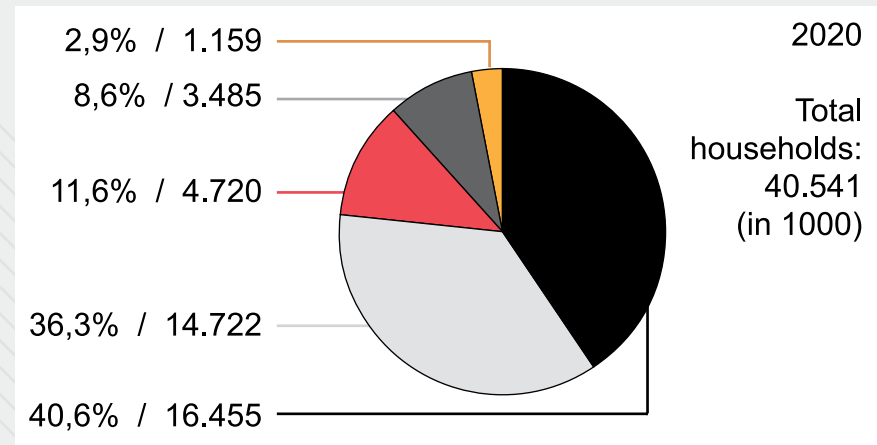
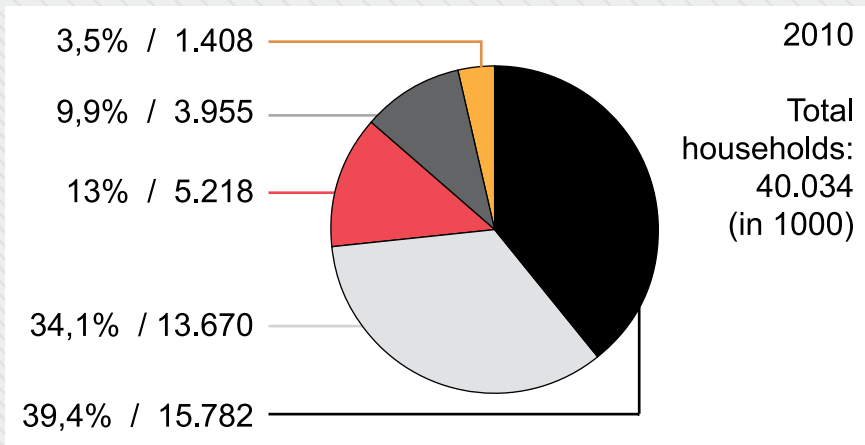
Producer prices July 2010: +24%






FROM WHERE THE FURNITURE IS COMING?

Furniture imports: The 10 top countries

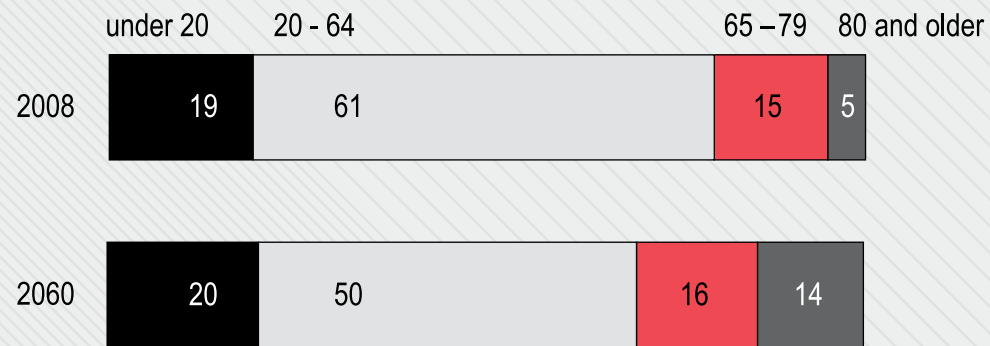


DEVELOPMENT OF THE PRIVATE HOUSEHOLDS UNTIL 2025 IN GERMANY



 households with 1 person
  2 persons
  3 persons
  4 persons
  with 5 or more persons

CHANGE IN POPULATION STRUCTURE 2008-2060

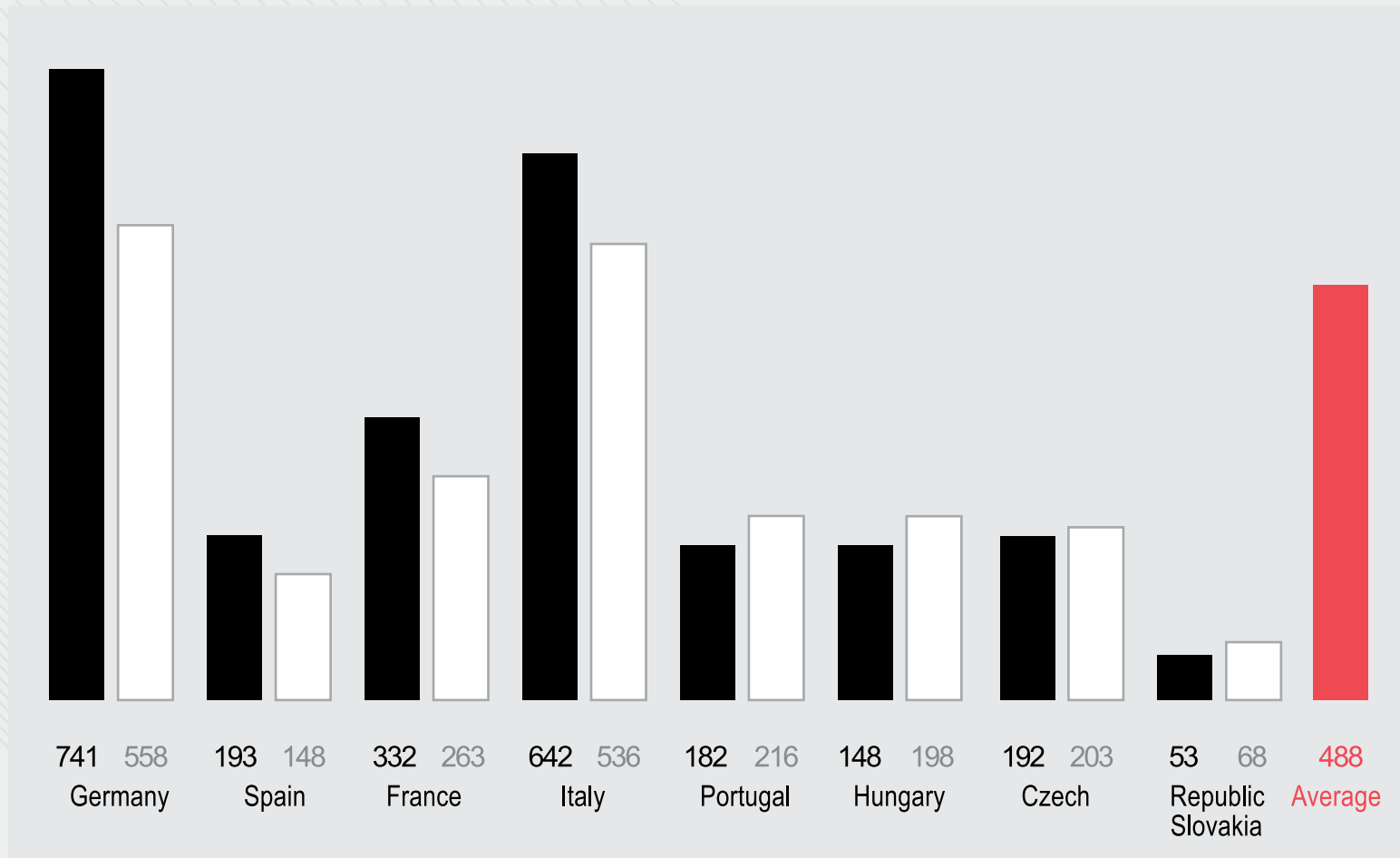


Shares of each age-group in %

FINISHED FLATS IN EUROPE 2008 - 2012

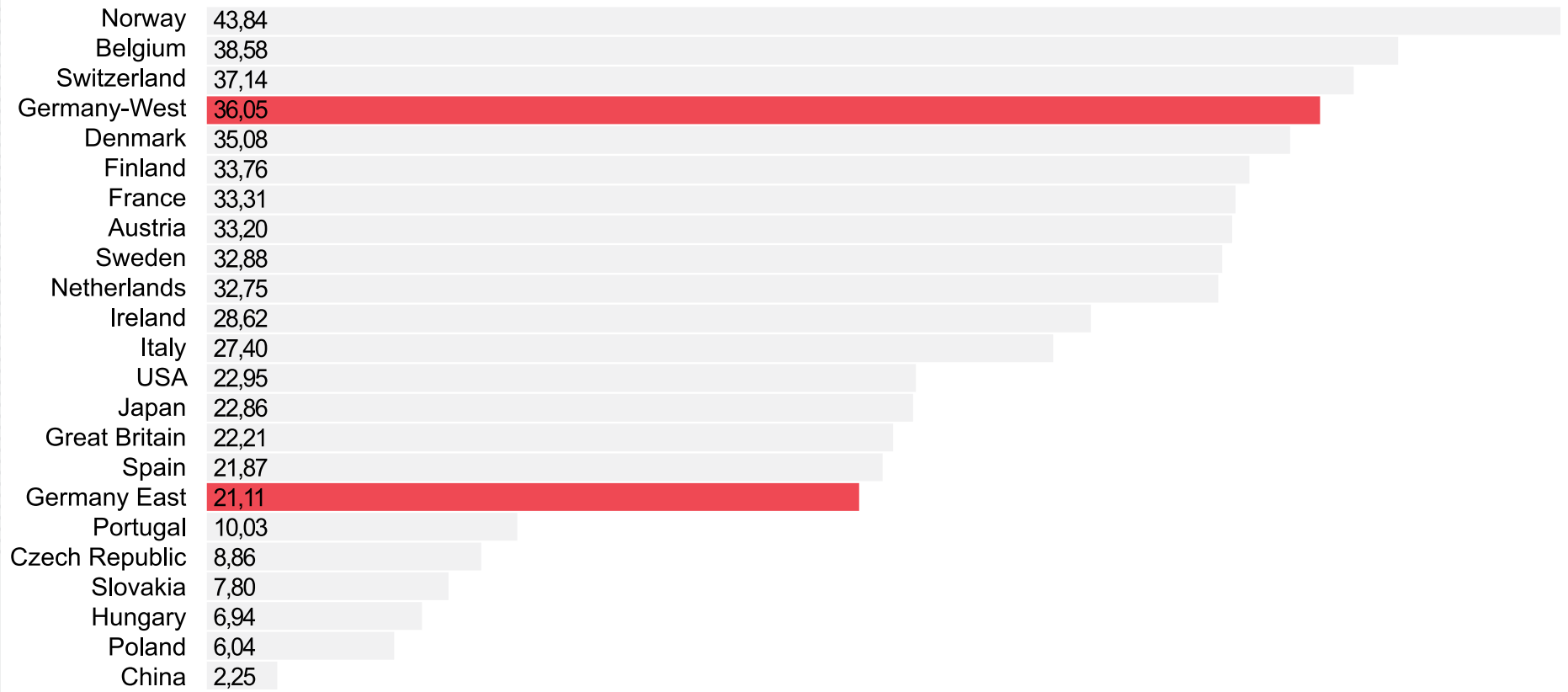
	ABSOLUTE FIGURES IN 1000 UNITS FOR LIVING					Changes in %
	2008	2009	2010	2011	2012	2012/2008
Belgium	52,5	46,9	41,5	42,6	38,2	-27,2
Denmark	26,0	17,0	10,0	11,0	12,0	-53,8
Germany	152,3	136,5	157,0	166,0	183,0	+20,2
Finland	30,5	22,2	24,0	28,0	27,5	-9,8
France	423,5	357,0	320,0	335,0	325,0	-23,2
Great Britain	168,0	139,0	145,0	131,0	133,0	-20,8
Ireland	51,3	28,0	7,5	7,5	8,0	-84,4
Italy	278,2	244,3	190,3	159,0	159,6	-42,6
Netherlands	78,9	83,0	62,0	63,5	64,5	-18,3
Norway	28,6	21,7	20,0	22,0	27,0	-5,8
Austria	46,6	45,4	43,2	42,0	41,7	-10,6
Portugal	58,8	50,1	36,5	22,1	19,3	-66,0
Sweden	35,3	22,8	18,5	23,1	28,2	-20,1
Switzerland	44,2	43,5	44,5	46,6	48,9	+10,8
Spain	682,0	414,0	100,0	115,0	120,0	-82,7
Western Europe (EC-15)	2.164,3	1.661,2	1.219,9	1.214,3	1.235,9	-42,8
Poland	165,2	160,0	170,0	175,0	175,0	+5,9
Slovakia	17,2	18,8	15,3	15,8	16,2	-5,7
Czech Republic	38,4	35,5	31,0	29,1	31,6	-17,7
Hungary	36,1	32,0	25,0	27,0	33,0	-8,6
Middle-East-Europe (EC-4)	256,9	246,3	241,3	246,9	255,8	-0,4
Euro construct-Area (EC 19)	2.421,1	1.907,5	1.461,2	1.461,2	1.491,7	-38,4

EXPENSES FOR FURNITURE IN EUROPE



Average expenditures per household
 Average expenditures per household with similar income 2009

COSTS PER EMPLOYEE PER HOUR IN 2009



GERMANY'S FURNITURE IMPORT BY PRODUCT GROUP

ABSOLUTE FIGURES IN 1000 UNITS FOR LIVING

Product group	2005	2006	2007	2008	2009	Changes in %
1. Living- and kitchen furniture out of wood	1.220,8	1.137,5	1.093,7	1.016,0	1.062,4	+ 4,6
Kitchen furniture	88,5	89,7	91,5	82,6	77,2	- 6,5
Bedroom furniture	373,9	326,9	312,2	296,1	315,7	+ 6,6
Dining- + living room furniture	758,4	721,2	690,0	637,3	669,5	+ 5,1
2. Sitting	3.935,5	4.276,9	4.572,6	4.634,2	4.248,0	- 8,3
Swivel chairs	87,0	91,0	101,1	118,0	126,4	+ 7,1
Daybeds	157,8	145,7	149,8	137,0	135,3	- 1,2
Rattan- + wicker chairs	54,8	47,9	48,4	34,3	31,7	- 7,6
Upholstered wooden seats	971,7	1.050,7	1.029,3	1.035,9	1.021,1	- 1,4
Other wooden sitting furniture	170,2	163,0	178,5	174,0	176,3	+ 1,3
Sitting furniture out of metal	349,0	389,7	457,6	512,3	498,2	- 2,8
Other sitting furniture	87,1	78,0	93,0	95,9	103,0	+ 7,4
Components for sitting furniture	1.075,9	2.310,9	2.515,0	2.526,9	2.156,0	- 14,7
3. Office furniture	185,3	184,3	201,9	225,0	195,4	-13,2
Out metal	87,6	92,4	91,8	119,0	108,3	- 9,5
Out of wood	97,7	91,9	110,1	105,3	87,1	- 17,3
4. Other furniture	2.067,0	2.202,0	2.389,9	2.446,5	2.396,2	- 2,1
Metal beds/metal furniture	461,4	470,5	487,6	509,7	420,0	- 17,6
Metal components for furniture	267,1	301,3	354,6	340,1	316,7	- 6,9
Wooden components for furniture	388,8	399,7	429,2	463,6	443,4	- 4,4
components made of other materials	95,7	130,6	145,4	130,3	142,8	+ 9,6
Wooden furniture for shops	20,8	22,4	25,0	34,2	28,7	- 16,1
Other wooden furniture	516,6	563,3	603,7	612,4	662,6	+ 8,2
Plastic furniture	84,3	70,8	85,7	83,9	82,2	- 2,0
Other components	45,8	50,3	52,4	47,3	45,0	- 4,9
Bed frames	30,4	25,0	25,2	24,4	32,6	+33,6
Mattresses	156,1	168,1	181,1	200,6	222,2	+ 10,8
Total furniture imports	7.426,7	7.800,7	8.258,1	8.321,7	7.902,0	- 5,0

MOST IMPORTANT FURNITURE TRADING NATIONS - IMPORT COUNTRIES

Imports in million \$ US

	2004	2005	2006	2007	2008	2009
USA	30.694,3	34.017,7	36.244,9	37.269,7	34.526,7	26.707,4
Germany	9.972,4	9.979,1	10.602,4	11.180,1	12.312,6	11.349,3
France	6.036,1	6.558,8	6.945,3	8.312,1	9.166,2	7.666,5
Great Britain	7.265,6	7.305,8	7.907,6	9.546,1	9.119,5	6.687,7
Japan	4.635,3	4.901,6	5.072,7	5.257,0	5.521,4	4.894,1
Canada	4.107,9	4.616,3	5.317,7	5.954,8	6.037,9	4.791,8
Spain	2.379,6	2.709,6	2.952,5	4.185,3	4.241,0	2.919,4
Belgium	2.710,2	3.009,9	3.169,1	3.738,3	3.998,6	3.210,0
Netherlands	2.443,9	2.581,7	2.787,9	3.435,1	3.808,4	3.070,7
Switzerland	2.114,9	2.309,7	2.456,2	2.953,8	3.224,2	2.820,5
Austria	1.993,4	1.975,4	1.950,1	2.509,2	2.696,1	2.422,4
Italy	1.710,8	1.929,5	2.258,0	2.906,5	2.918,0	2.359,1
Australia	1.322,3	1.498,0	1.695,1	2.048,1	2.376,1	2.085,8
Sweden	1.614,3	1.660,6	1.898,2	2.390,6	2.539,5	1.760,7
Norway	1.162,4	1.338,5	1.494,8	1.875,3	2.167,2	1.631,5
Russia	5,29,3	651,7	918,4	1.471,4	2.014,8	1.491,3
Denmark	1.012,9	1.141,4	1.374,8	1.796,5	1.794,5	1.358,3
Czech Republic	716,3	856,9	988,1	1.257,8	1.522,1	1.243,9
China	667,8	615,5	732,1	1.046,3	1.158,6	1.230,2
Mexico	1.193,5	1.273,6	1.541,6	1.875,5	1.859,2	1.224,8
Poland	742,3	868,5	983,8	1.345,9	1.740,3	*
South Korea	616,3	914,6	1315,2	1.581,1	1.496,0	1.119,9
Portugal	581,0	593,8	627,3	828,6	891,7	715,4
Total world	97.042,3	105.664,4	115.711,1	130.519,6	132.046,8	106.152,4

CENTERS OF DEVELOPMENT UP TO 2010

Yearly growth rate in percent

