

## Companies and brands

### Wren Kitchens overtakes B&Q's market share

In 2018 Wren Kitchens captured an estimated 11% of consumer spending on kitchens, ahead of B&Q, which saw share weaken to 9%. Howdens is a major force in kitchens with an estimated 27% share.

### Variety of companies serve the kitchen market

Wren Kitchens (77 stores in 2018) is the largest specialist kitchen retailer by turnover. Wren Kitchens has enjoyed year-on-year growth, helped by range extension and new store openings. In 2018 turnover rose by 20.6% compared with the previous year, to reach £491 million (excl VAT). Magnet (212 stores in 2018) generated an estimated £152 million turnover in 2018, +6.3% on 2017, helped by repositioning of the brand as 'The Heart of the Home' and focusing on families.

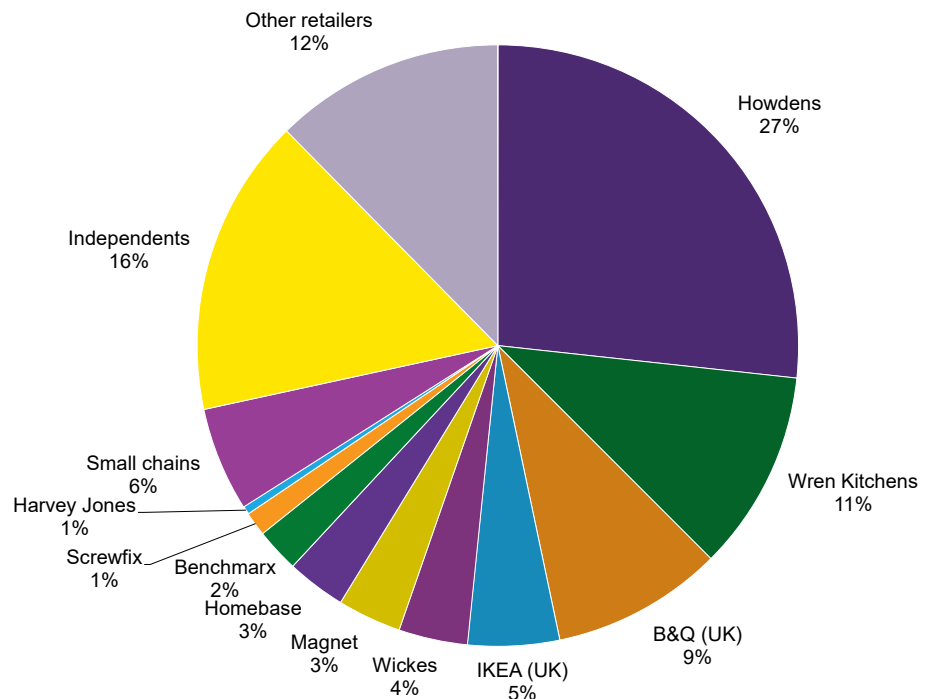
### Substantial changes in the DIY sector

The DIY chains are significant players in the UK kitchen market, although there has been a substantial amount of change in the sector in recent years. B&Q (296 stores in 2018) and Homebase (249 stores in 2018) no longer offer installation services and both have changed their branding strategy. Homebase has had two changes of ownership in recent years and, since mid-2018, has been owned by turnaround specialist Hilco. Wickes, which has picked up momentum because it does offer installation services, has been put up for sale by its parent company, Travis Perkins Group, which also runs the trade-facing Benchmark chain.

### IKEA's planning studios are a shift in strategy for this major furniture retailer

IKEA (22 stores, 2 planning studios and 3 Order and Collect Points) is a growing force in kitchens and has been investing in new stores in the UK, including town centre planning studios where shoppers can refine their kitchen plans with an in-store designer. The main IKEA stores all include kitchen planning areas where shoppers can book appointments with planners.

FIGURE 5: SHARE OF CONSUMER SPENDING ON KITCHENS, 2018 (EST)



Note: estimates are not directly comparable with previous reports

Source: Mintel estimates

### Trade-facing businesses show fast growth

Howdens (700 stores in 2018) generated £1,477 million turnover in 2018, +7.7% on 2017. Howdens caters for small builders with a range of kitchens and joinery. It is a substantial supplier of kitchens and sells to builders who are working directly for consumers, as well as to landlords and to new builds or conversions. Benchmark (180 stores in 2018), owned by Travis Perkins, has a similar customer base to Howdens, although supplies a wider range of goods in addition to kitchens.

### Shortening lead times and changes to installation services

Homebase and B&Q have in-store kitchen planners but no longer offer installation services, setting them apart from Wickes, Wren Kitchens, IKEA and Magnet, all of which do offer to install kitchens. Wickes, which does offer installation, noticed an uptick in sales volumes after B&Q's changes. The company's kitchen and bathroom showroom products saw a robust performance in the year to Q3 2019, contributing to 8.6% growth for Travis Perkins' retail divisions compared with the same quarters in the previous year.

### Wren and Magnet can design a bespoke kitchen

Premium kitchen retailers such as Tom Howley, Roundhouse and Martin Moore specialise in bespoke kitchens, while Harvey Jones is a high-end chain that specialises in bespoke design. Wren Kitchens offers tailored kitchens at the high end of its range and Magnet can also create bespoke designs.

### B&Q and Homebase rebrand kitchens

B&Q launched the GoodHome brand in 2019, which spans a wide range of products across the store. Following the change of ownership to Hilco, Homebase has established two kitchen brands, Homebase (flat pack) and the higher-priced Copperbridge (rigid construction). Similarly, Wickes offers two kitchen ranges, Ready to Fit Kitchens (flat pack) and Showroom Kitchens (rigid). Wren Kitchen's branding caters for good, better, best pricing layers under the Vogue, Infinity and Infinity Plus brands. Vogue is a flat-pack range, Infinity cabinets are factory built and the Infinity Plus brand is bespoke. Wren Kitchens offers a wide choice of colours in the Infinity Plus range, with 78 colour options for customers to choose from.