

KITCHENS AND KITCHEN FURNITURE – UK – 2023

The cost-of-living crisis will constrain demand for kitchens in the short term, but there is still scope to grow, driven by the newfound appreciation for the home.



Sam Nguyen, Retail Analyst



Kitchens And Kitchen Furniture - UK - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of the cost-of-living crisis on the kitchen and kitchen furniture market, including changes in buying behaviours.
- Opportunities and new demand from this market disruption.
- How retailers are performing and innovating.
- Trends towards consumer expenditure on kitchens/utility rooms and channels used for purchasing.
- Consumer motivations behind investment, as well as general views on spending money on kitchens and kitchen furniture.



The cost-of-living crisis will constrain demand for kitchens in the short term, but there is still scope to grow, driven by the newfound appreciation for the home.

Overview

Characterised by high cost, the kitchen market has taken a hit as consumers have reined in their spend, and the weak housing market only served to worsen the situation. Alongside delaying new purchases until their finances improve, almost two thirds of consumers have traded down to more affordable options when buying for the kitchen.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

Opportunities for the kitchens and kitchen furniture market

- Smaller-ticket projects remain resilient...
- ...but there are also opportunities for major renovations
- The rise of flexible living opens up new demand
- Omnichannel presence is key

Market dynamics and outlook

- The five year outlook for kitchens and kitchen furniture
- Incremental growth is expected for the next five years
- Cabinets account for over half of total kitchen expenditure
 - Graph 1: market for kitchens and kitchen furniture, by segment, 2023 (est)
- Builders' merchants make strides in post-pandemic recovery
 - Graph 2: kitchens and kitchen furniture, channels to market, 2020-22
- Housing market cools down
 - Graph 3: number of property residential transactions with a value of over £40,000 completed in the UK, 2019-23

What consumers want and why

- Built-in appliances become more popular in the kitchen
 - Graph 4: presence of free-standing and built-in appliances in kitchens, 2022 and 2023
 - Graph 5: kitchens and utility rooms, 2023
- The kitchen is no longer just a space for cooking
 - Graph 6: arrangement of kitchens and dining areas, 2022 and 2023
- Smaller-ticket projects lead spending
 - Graph 7: amount spent on kitchens and utility rooms, 2021-23
 - Graph 8: kitchen and utility room refits and repairs, 2023
- Online leads purchasing
 - Graph 9: channels of purchase, 2022 and 2023
- Multichannel retailers dominate engagement
 - Graph 10: key retailers used, 2023
- Style update is an important motivation

- Graph 11: motivations behind kitchen project, 2023
- Three quarters of consumers prefer to spend on products with longevity
 - Graph 12: statements about expenditure on kitchens, 2023
- Space-saving is a key area of demand
 - Graph 13: statements about expenditure on kitchens, 2023

Retailer activity

- Howdens lead the pack
- Lessening the impact of buying new
- Advertising spend continues to recover
 - Graph 14: total above-the-line, online display and direct mail advertising expenditure on kitchens, 2019-23*

MARKET DYNAMICS

Market size

- Consumer spending on kitchens is expected to fall to £4.5 billion
 - Graph 15: market size for kitchens and kitchen furniture, 2018-23
- Polarisation of demand continues
- There are some signs of improvement

Market forecast

- There are hopes that the worst is over
- There are hopes that the worst is over
- Incremental growth is expected in the next few years
- Learning from the last income squeeze...
- ...but the current situation is more unique

Market segmentation

- Cabinets maintain the lion's share
 - Graph 16: market for kitchens and kitchen furniture, by segment, 2021-23 (est)
- Demand for worktops remains resilient

Channels to market

- Merchants benefit from the renewed appetite for Do-It-For-Me
 - Graph 17: kitchens and kitchen furniture, channels to market, 2020-22

Macro-economic factors

- Inflation will continue to eat into consumer spending power over the course of 2023...
- ...but there have been signs of improvement
 - Graph 18: annual rate of inflation, CPIH & furniture and furnishings, 2022-23

- Interest rates will rise in importance over the remainder of 2023 and into 2024
- Housing transactions drop
 - Graph 19: number of property residential transactions with a value of over £40,000 completed in the UK, 2019-23
- Consumer sentiment: the recovery has begun
 - Graph 20: the financial wellbeing index, 2016-23
- Uptake of credit on the rise
 - Graph 21: consumer credit excluding student loans, 2021-23

Social, environmental and legal factors

- Hybrid working is here to stay
- The shift to private renting
 - Graph 22: England housing tenure, 2017/18-2021/22

WHAT CONSUMERS WANT AND WHY

Kitchens and utility rooms

- Most consumers have a kitchen
 - Graph 23: kitchens and utility rooms, 2023
- An uptick in built-in appliances ownership
 - Graph 24: presence of free-standing and built-in appliances in kitchens, 2022 and 2023
- Built-in is favoured by the most affluent
 - Graph 25: presence of free-standing and built-in appliances in kitchens, by household income, 2023
- Separate kitchen and dining area remains the most common eating layout
 - Graph 26: arrangement of kitchens and dining areas, 2022 and 2023
- Over a third of consumers have an open-plan kitchen
- The more affluent embrace kitchen-diner and lounge-diner combinations
 - Graph 27: arrangement of kitchens and dining areas, by age and household income, 2023

Kitchen and utility room refits and repairs

- Over a third of consumers have spent money on the kitchen
 - Graph 28: kitchen and utility room refits and repairs, 2019-23
- Smaller-ticket projects lead spending
 - Graph 29: kitchen and utility room refits and repairs, 2023
- Repairs and refits are most prevalent within the first five years of a house move
 - Graph 30: kitchen and utility room refits and repairs, by duration in the home, 2023
- A shift towards smaller amounts of expenditure
- The majority spend under £5,000
 - Graph 31: amount spent on kitchens and utility rooms, 2021-23
- Polarisation in demand

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- Graph 32: amount spent on kitchens and utility rooms, by household income, 2023
- Expenditure levels are also dictated by...
- Long-term dwellers are more generous spenders
 - Graph 33: amount spent on kitchens and utility rooms, by duration in the home, 2023

Channels of purchase

- Online leads engagement
 - Graph 34: channels of purchase, 2022 and 2023
- Online retail benefits from positive price and convenience perceptions
- The rise of mobile shopping
- Physical stores are preferred for larger basket purchases
 - Graph 35: channels of purchase, by expenditure level, 2023
- Physical stores are preferred for kitchen refit purchasing
- Affluent consumers are most likely to buy in-store
 - Graph 36: channels of purchase, by income level, 2023

Retailers where households spent most for kitchens

- IKEA leads the pack
 - Graph 37: retailers that consumers spent the most money with for kitchens and kitchen furniture, 2023
- IKEA is popular with online shoppers...
- ...while the opposite is true with B&Q
- Multichannel retailers dominate engagement...
- ...with DIY retailers being a crucial touchpoint

Motivations behind kitchen project

- Style update is an important motivation...
- ...with two in five consumers saying so
 - Graph 38: motivations behind kitchen project, 2023
- But the cost-of-living crisis has driven necessity to the fore
- It's not always about trading down
- Work surfaces a key area of big-ticket spending
 - Graph 39: motivations behind kitchen project, by expenditure level, 2023
- The majority come in-store when spending on style updates
 - Graph 40: motivations behind kitchen project, by purchase channel, 2023

Kitchen attitudes and shopping behaviours

- Almost two thirds trade down to affordable options...
 - Graph 41: statements about expenditure on kitchens, 2023
- ...with lower earners most likely to do so
- Taking home improvement into their own hands

- DIY for all genders
- Spending intentions remain robust
- Sustainability is still high up on the agenda
 - Graph 42: statements about expenditure on kitchens, 2023
- Space-saving as a key area of demand...
- ...especially amongst parents with young kids
- Opportunities for rental

RETAILER ACTIVITY

Market share

- Howdens lead the pack

Competitive strategies

- Strengthening offline presence
- A sharp focus on lessening the impact of buying new...
- ...but the premium market remains a key area of growth
- A spotlight on trade customers
- Taking manufacturing in-house

Launch activity and innovation

- Amping up physical touchpoints
- Making kitchen buying more accessible
- A focus on space-saving
- Sustainability remains a priority

Advertising and marketing activity

- Adspend continues to recover
 - Graph 43: total above-the-line, online display and direct mail advertising expenditure on kitchens, 2019-23*
- Beautiful. Purposeful
- Prices. Nailed
- Be house proud with Wickes
- MKM's first ever TV advertising campaign

APPENDIX

Supplementary data

- Wren Kitchens remains the top spender
- TV consolidates as the prime advertising channel

- Graph 44: total above-the-line, online display and direct mail advertising expenditure on kitchens, by media type, 2021 and 2022

Market forecast data and methodology

- Market size and forecast: underlying data
- Market forecast and prediction intervals (value)
- Forecast methodology

Report scope and definitions

- Market definition
- Market segmentation definition
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel Coverage

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