

FURNITURE
MARKET
RESEARCH

Csil

CSIL, Centre for Industrial Studies, is an independent research and consulting company founded in Milan (Italy), in 1980 and specializing in applied economic research. In over 35 years of activity CSIL has become an established research centre for market information, competitiveness analysis, and the diagnosis and design of sector strategies for both public and private business partners.

CSIL TEAM

Thanks to its considerable experience in numerous sectors and countries, CSIL has earned an excellent reputation for reliability and intellectual leadership. CSIL research and consulting activities are driven by the search for sound facts which tell stories that are relevant to our clients. Our experts pursue their work with intellectual integrity and a genuine passion for understanding growth and innovation processes.

CSIL PARTNERS

are **highly qualified experts** including:

- > Economists
- > Engineers
- > Business analysts
- > Statisticians
- > Experts in policy & project evaluation

CSIL also boasts a network of **local** and **international** experts and **professionals**

CSIL CLIENTS

Approximately 2,000 clients globally over the last ten years

CSIL clients include:

- > International manufacturing and distribution companies
- > Leading consulting companies
- > National and international trade associations
- > Consortiums and fairs
- > Private and public institutions

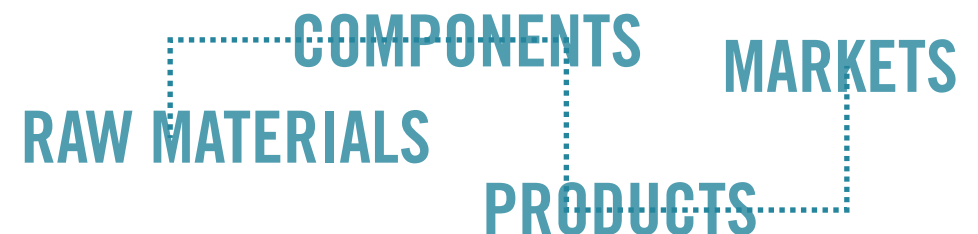
One of CSIL core business unit is specialized in industry studies and market research for the **furniture and furnishings** sector, customizing a wide range of services in response to specific needs. The unit provides useful support to companies and institutions in:

- > Their process of selection and analysis of market opportunities on a global scale
- > Identifying and shaping their development strategies

A GLOBAL PERSPECTIVE OF THE FURNITURE SECTOR WITH INSIGHTS INTO ALL FURNITURE SEGMENTS



AND IN DEPTH KNOWLEDGE OF THE ENTIRE VALUE CHAIN



OUR ACTIVITIES

FURNITURE MARKET RESEARCH:

- > **MULTICLIENT RESEARCH**
- > **CUSTOM MADE STUDIES**

TRAINING:

- > **SEMINARS**
- > **WORKSHOPS**

MEDIA SERVICES

- > **REVIEW**
- > **ADVERTISING**
- > **NEWSLETTERS & EMAIL BLASTS**

CSIL FURNITURE MARKET RESEARCH

CSIL research activity is based on a longstanding experience in gathering, monitoring and interpreting data on a broad basis, in terms of both time and geographic coverage. CSIL's extensive knowledge is further enhanced by a constant dialogue with all the players involved in the furniture sector.

CSIL strengths in research include the following:

- > A **strong focus** on the furniture sector and its entire **value chain**
- > A **global view**, in terms of both the areas studied and the customers served
- > A sound **quantitative approach**, including consolidated experience in **forecasting**
- > Decades of experience in dealing with **sector issues**, including **qualitative trends analysis** through extensive and focused **surveys**
- > Immediate access to an enormous **in-house database** of sector information
- > A **global network** of sector experts and professionals

What CSIL does:

- > **Quantitative analysis:** market sizing and demand forecasting
- > **Competitive analysis:** mapping and studying sector players, their market shares and performances
- > **Qualitative analysis:** investment drivers, product trends, consumer preferences
- > Support in the formulation of **marketing strategies**
- > Assistance in the implementation of **action plans:** lead generation and creation of B2B contacts

The research outputs are:

- > **Multiclient research** available off-the-shelf for CSIL customers
- > **Custom made studies** prepared for individual clients



CSIL MULTICLIENT RESEARCH

Every year CSIL's multiclient catalogue includes **over 40 updated off-the-shelf reports**, covering all furniture segments and the 70 most important countries worldwide. Reports are tailored to respond to various information requirements and can be grouped into the following types:

MARKET SCENARIO

These reports offer an overview of the global sector. Production, consumption, imports and exports of furniture. Openness of the markets, origin of furniture imports and destination of exports. Statistics and outlook for each country. Prospects for international trade. Forecasts for the development of furniture demand.

COUNTRY OUTLOOK

Overview of the furniture industry in a specific country. Data provided include furniture sector performances (production, consumption, imports and exports), three-year market forecasts, macroeconomic and business climate indicators, maps and detailed trade statistics. Reports also provide short profiles of key players in the furniture market.

COMPETITION

Market shares of sector companies, analysis of their structure and performance, overview of the strategies and growth initiatives implemented. Company profiles including a description of the activity, production facilities, controlled companies and subsidiaries, brands, product portfolio and basic financial indicators.

DISTRIBUTION SYSTEM

Overview of home furniture distribution systems. Size, segmentation and trends in the home furniture market. Analysis of the distribution channels for domestic and imported furniture. Study of the main distribution formats (online - offline) and performance of the key players. Company profiles for furniture retailers and buying groups.

COUNTRIES YEARLY MONITORED BY CSIL MULTICLIENT REPORTS

Algeria, Argentina, Australia, Austria, Bahrain, Belgium, Bosnia-Herzegovina, Brazil, Bulgaria, Canada, Chile, China, Colombia, Croatia, Cyprus, Czech Republic, Denmark, Egypt, Estonia, Finland, France, Germany, Greece, Hong Kong, Hungary, Iceland, India, Indonesia, Iran, Ireland, Israel, Italy, Japan, Kazakhstan, Kuwait, Latvia, Lebanon, Lithuania, Malaysia, Malta, Mexico, Morocco, Netherlands, New Zealand, Norway, Oman, Philippines, Poland, Portugal, Qatar, Romania, Russia, Saudi Arabia, Serbia, Singapore, Slovakia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, Ukraine, United Arab Emirates, United Kingdom, United States, Venezuela, Vietnam

MULTICLIENT REPORTS ARE AVAILABLE FOR IMMEDIATE DELIVERY:

- > Online from CSIL's ecommerce website www.worldfurnitureonline.com
- > By contacting our sales department at csil@csilmilano.com

CSIL CUSTOM MADE STUDIES

CSIL carries out research projects **on demand**.

- > As a first step CSIL proposes a **methodological approach**, a combination of **different working tools** (see following pages) and a **working plan** aimed at fulfilling the customer's information requirements.
- > Through an **ongoing process**, the offer is discussed and fine-tuned with clients in order to better satisfy the customer's needs.
- > CSIL activates a **working group** combining CSIL senior partners and researchers with external expertise to provide specific skills related to the research requirements and expectations. The choice is made from CSIL's large database of sector and country experts.
- > The **results of the research** are delivered and presented to the customer.

CSIL has wide-ranging experience of working on projects of different scales and scopes, including **small scale projects and articulated studies, research for institutional bodies and private companies, qualitative and quantitative analysis.**

CSIL HAS ALWAYS PROVIDED SOUND RESULTS AND AN INDEPENDENT AND QUALIFIED ASSESSMENT



FOR INFORMATION

- > csil@csilmilano.com
- > +3902796630

EXAMPLES OF RECENT STUDIES CSIL HAS CARRIED OUT FOR ITS CLIENTS

Five years **forecasting** for the global furniture production and the main world regions (prepared for multinational companies)

Technical market analysis and **feasibility studies** for investments in the wood-furniture value chain (prepared for leading international institutions)

Benchmarking the national furniture sector performance in the global context (prepared for furniture sector associations)

Quantifying **market potential** and **market niches** and identifying **product trends** for wood and furniture products (prepared for companies and leading brands operating on the international markets)

Brand positioning (prepared for major companies)

Product and pricing tests for new items in specific markets or/and distribution channels (prepared for furniture manufacturers)

Formulating **strategies** and **action plans** for companies/institutions aimed at penetrating new markets and/or consolidating their positioning

Mapping the key sector players globally and/or in specific areas (prepared for leading suppliers to the furniture industry)

Outlying **industry preferences** in terms of raw materials and components (prepared for leading suppliers to the furniture industry)

Studying the **attractiveness of furniture exhibitions** in the global scenario (prepared for fair organizers)

TOOLS

CSIL SECTOR STATISTIC DATABASE

Over the years CSIL has built up a large **data set** collecting national data for **more than 70 countries** worldwide covering:

- > Data for **furniture** and its main sub-segments for the following variables: **consumption, production, imports and exports**. These figures are updated twice a year and are available in value and volume.
- > **Breakdowns of furniture production by material** are available for some countries and products. These figures are updated yearly.
- > **Macroeconomic data** gathered from the main international sources.
- > Information on the **main demand determinants** collected from national sources.

This information is processed and included in CSIL reports.

Thanks to its comprehensive data management system CSIL is able to set up customized extractions based on **countries/segments** and specific data processing according to the client's needs.



CSIL FORECASTS

CSIL PROVIDES FORECASTS FOR:

- > Sector production and market consumption
- > World and major geographical areas
- > Furniture aggregate and its sub-segments
- > Time frame of up to five years

FORECASTS ARE INTENDED TO HELP CLIENTS:

- > To compare the past with expected future sector development
- > To set priorities and formulate marketing strategies
- > To assess the impact of alternative scenarios on their business strategy and investments

CSIL furniture forecasts are based on both the processing of information gathered during field studies and the results of econometric analysis.

CSIL is prepared to set up **customized forecasts** based on **countries/segments** and specific data processing according to the client's needs.



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CSIL SURVEYS

CSIL has built up **consolidated experience in conducting surveys** over the many years of its activity.

More specifically, for its research the CSIL team constantly carries out:

- > **Structured face-to-face interviews**
- > **Phone interviews** with all the actors along the value chain
- > Extensive **online surveys**

Interviews are conducted in several languages including Italian, English, French, German, Spanish, Russian and Chinese.

The information gathered includes qualitative and quantitative data, such as:

Company performances, the selection and purchasing processes for raw materials and components, brand recognition and investment drivers.

In addition to standard questionnaires formulated by CSIL, the team can **customize survey models** according to the customer's unique needs in terms of both contents development and target definition.

CSIL SECTOR COMPANIES DATABASE

The starting point and also the result of CSIL research activity is a huge and **up-to-date database including over 50,000 sector companies.**

CSIL efforts in desk and in-field analysis of these players allow it to draw up concise or detailed profiles containing such information as the last available turnover, the number of employees, company activities across the world, brands controlled, supply and distribution systems, type of products offered.

The CSIL database also includes records for over **15,000 sector professionals.**

Thanks to its comprehensive data management system CSIL is able **to set up customized extractions** based on the company's activities and products and specific data processing responding to the client's particular needs.

SEMINARS & WORKSHOPS

CSIL experts regularly attend international seminars and workshops delivering speeches, on:

- > **Global market trends and forecasts**
- > **Production development**
- > **Distribution channels – retailing and contract**
- > **Product trends**
- > **Design trends**
- > **SMEs, clusters and export promotion**
- > **Strategic approach to the world's markets**

In addition, CSIL organizes tailored **seminars, workshops, meetings** for companies, associations, fair organizers, consortia and clusters providing:

- > **Scientific direction of events**
- > **Chairing sessions**
- > **Selection of speakers/panel of experts**
- > **Support for event promotion**

CSIL organizes focused **training and study tours** in Italy for foreign operators.



CSIL EVENTS

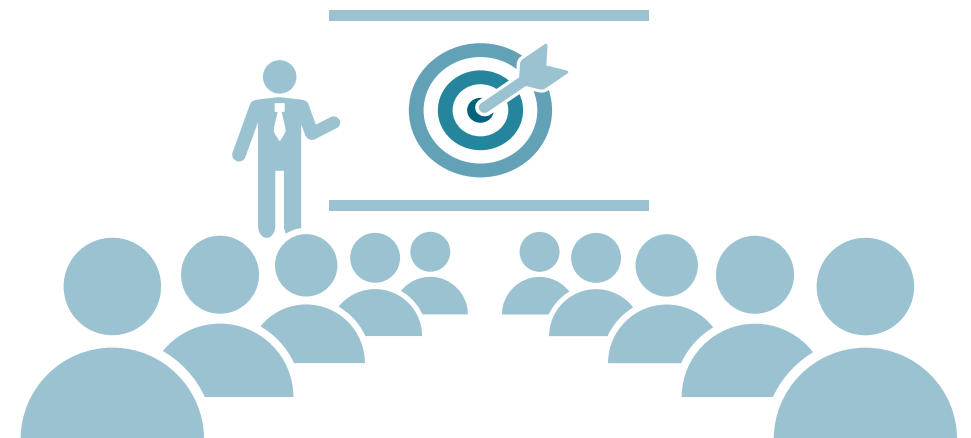
Through 2 annual meetings, bringing together the leading sector operators, press, world level economists and researchers, CSIL aims to involve the main actors of the furniture industry worldwide, in order to line up the furniture market situation and outline the prospective for this sector in the world.

WORLD FURNITURE OUTLOOK WORKSHOP

Held annually during the Milan International Furniture Fair “I SALONI”, the **“World Furniture Outlook Workshop”** is a unique occasion to gather comments on the key issues regarding production, consumption and trade of the major industrial economies worldwide and to introduce the furniture sector forecasts. CSIL experts, International keynote speakers and a team of corporate and institutional representatives together in a round table present global sector performances and perspectives. Working language: English.

FORECAST SEMINAR ON FURNISHINGS MARKETS

Held annually, the **“Forecast Seminar on Furnishings Markets in Italy and Worldwide”** is a debate that takes place in Milan in November each year, which is expressly designed by CSIL for leading sector players and operators, representatives of institutions and trade associations, press, economists and researchers, to present the forecast scenario for the furniture industry in Italy and worldwide. Working language: Italian.



WORLD FURNITURE – INTERNATIONAL MARKET REVIEW

World Furniture is a quarterly magazine for professionals and a platform for economic information on global markets, business strategies, trends and innovation for furniture, furnishings (residential/contract) and related sectors (materials, components, flooring, doors and windows, lighting, appliances, outdoor, interior design), published by CSIL since 1999.

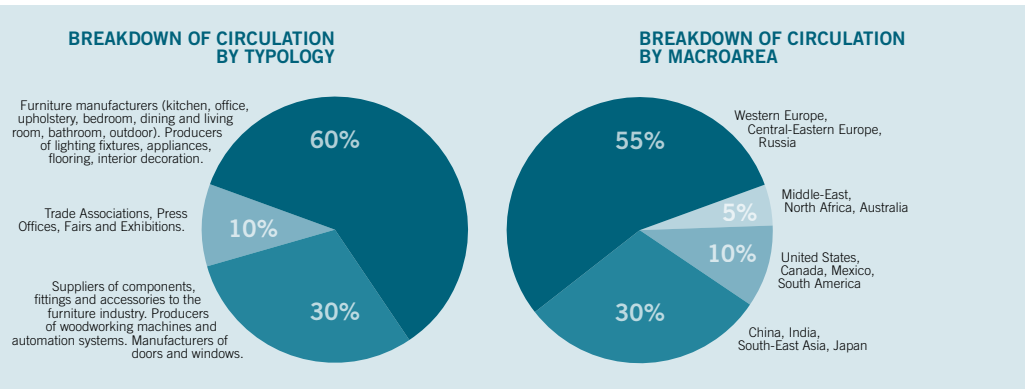
The magazine is available both in print and digital form. English language only.

CIRCULATION

Each printed edition is mailed to a selected database of manufacturers/suppliers in the world's main furnishings producer, exporter and consumer countries. Digital copies of each issue go to a further 15,000 professionals worldwide. World Furniture is also distributed at leading international fairs in the sectors of reference and at CSIL international seminars and workshops.

Digital edition available at: www.worldfurnitureonline.com

4 ISSUES/YEAR, BOTH IN PRINT AND DIGITAL FORMAT: IN MARCH, JUNE, SEPTEMBER AND DECEMBER



FOR INFORMATION

- > PAOLA GOVONI | Editor in Chief
- > govoni@csilmilano.com

CSIL MEDIA AND ADVERTISING

In addition to its research services, CSIL also provides clients with **flexible advertising opportunities** to promote their companies and events. Advertisements may be published online on www.worldfurnitureonline.com (CSIL's web-showcase for reports and news) or sent to the **CSIL database** through dedicated newsletters.

COMMUNICATION CHANNEL	OUR SERVICE UPON REQUEST
NEWS & EVENTS PAGE (www.worldfurnitureonline.com): A collection of news, articles, press releases and free information regarding the global furniture and furnishing markets.	This web page represents a unique opportunity for companies, associations and fair organizers interested in reaching their marketing target. Press releases and news pages can be uploaded, in both text and PDF format.
FAIRS CALENDAR PAGE (www.worldfurnitureonline.com): A free list of the most important exhibitions in the wood processing, furniture and furnishings industry, providing updated information on dates, locations and event websites.	Advertising on this web page is an inexpensive yet effective means of reaching visitors that have a direct interest in the furniture industry. Linked event banners may be uploaded in two sizes and in two positions on the page.
NEWSLETTERS & EMAIL BLAST (CSIL database contains 15,000 contacts): Our database is a potential customer base for companies interested in reaching a consolidated group of professionals belonging to different market segments.	Banners can be embedded in: <ul style="list-style-type: none"> • Reports promo newsletter (following the release of each of our reports) • WFR Digital Newsletter promoting the latest issue of WORLD FURNITURE review (quarterly according to the editorial programme) CSIL is also able to set up Email Blast (HTML provided by the Client not linkable to CSIL)

CSIL SOCIAL PAGES

We are present on major social platforms; Follow us on:



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- > csil@csilmilano.com
- > +3902796630

www.csilmilano.com

CSIL Centre for Industrial Studies

Corso Monforte 15

20122 Milano Italy

Tel + 39 02 796630

Fax + 39 02 780703

Email: csil@csilmilano.com

VAT: IT 04825320155

YOUR CONTACT PERSON AT CSIL

Giovanna Castellina

Tel: +3902796630 ext. 23

Email: castellina@csilmilano.com

www.worldfurnitureonline.com

Csil