



2013 Home Furnishings Industry Overview

CONSUMER SPENDING

Annual retail purchases in millions, for residential furniture and mattresses

2011	2012	% Change
\$88,811	\$93,993	5.8%

Source: U.S. Department of Commerce

FACTORY SHIPMENTS

Dollar value in millions. All data represents completed product. Excludes component part shipments.

	2011	2012	Change
Wood: Domestic	\$5,365	\$5,295	-1.3%
Wood: Imports	\$8,545	\$9,062	6.0%
Upholstered: Domestic	\$7,791	\$8,087	3.8%
Upholstered: Imports	\$3,665	\$4,191	14.4%

Source: American Home Furnishings Alliance; U.S. Department of Commerce; Mann, Armistead & Epperson, Ltd.

IMPORTS

As a percent of all household furniture sold in the U.S.

	2002	2011	2012
Total Household Furniture	41.1%	62.7%	64.4%
Wood Furniture	48.3%	69.8%	71.5%
Upholstered Furniture	17.7%	37.9%	40.2%
Metal and Other	65.2%	85.4%	86.9%

Source: W.W. Epperson of Mann, Armistead & Epperson Ltd., Richmond, Va.

U.S. FURNITURE FACTORY EMPLOYMENT

Wood household furniture production workers, in thousands

1999	2012	% Change	2013(P)	% Change
111.9	29.6	-73%	29.0	-2%

Upholstered household furniture production workers, in thousands

1999	2012	% Change	2013(P)	% Change
87.1	44.8	-49%	45.4	1.3%

Source: U.S. Department of Labor, Bureau of Labor Statistics

SIZE OF U.S. RESIDENTIAL FURNITURE INDUSTRY -- 2010

Type of Manufacturing	Total # of Firms	Number of paid employees			
		>20	20-100	100-500	500+
Total Household Furniture	3,895				
Upholstered Household Furniture	1,050	76%	15%	6%	3%
Nonupholstered Wood Household Furniture	2,567	89%	8%	2%	1%
Metal Household Furniture	273	74%	18%	5%	3%

Source: U.S. Bureau of Labor Statistics 2010 Survey of U.S. Businesses

SIZE OF U.S. RESIDENTIAL FURNITURE INDUSTRY – 2010 vs. 2008

Type of Manufacturing	Total # of Firms		
	2008	2010	% change
Total Household Furniture	4,939	3,895	-21%
Upholstered Household Furniture	1,365	1,050	-23%
Nonupholstered Wood Household Furniture	3,249	2,567	-21%
Metal Household Furniture	325	273	-16%

Source: U.S. Bureau of Labor Statistics 2008 Survey of U.S. Businesses

BEDROOM & DINING ROOM FURNITURE WOOD SPECIES

Wood Species	2010 Share	2000 Share
<i>Oak (Red & White)</i>	17%	17%
<i>American Cherry</i>	15%	20%
<i>Maple</i>	6%	9%
<i>Rubberwood</i>	9%	3%
<i>Pines</i>	3%	10%
<i>Mahogany</i>	5%	6%
<i>American Ash</i>	5%	4%
<i>Alder or Poplar(Tulipwood)</i>	5%	5%
<i>American Walnut</i>	6%	2%
<i>Birch</i>	6%	0%
<i>Other woods*</i>	12%	6%
<i>Painted wood</i>	7%	4%
<i>Other**</i>	4%	14%
TOTAL	100%	100%

**Other woods include: acacia, Indonesian pine, petrorcarpas, riato, chu, boroa, mindi, sycamore, peroba, pulai, rosewood, teak, wenge, hickory, zebrawood, parawood and primavera.*

***Other includes overlays, printed on wood and other wood species or materials not readily identifiable.*

Source: Appalachian Hardwood Manufacturers Inc., October 2010 Furniture Styles and Material Use Survey.