

## Our market



### UK market

- 29 million UK homes, 18 million owned and 11 million rented.
- Market continues to shift from DIY to 'Do It For Me'.
- Strong level of investment in new house build.
- Stamp duty holiday has given short-term stimulus.
- Consumer spend switching into home improvement given current conditions.

### Kitchens for everyone

- UK market leader, selling 1 in every 3 kitchens.
- Selling primarily to small builders who supply into a broad range of markets including social housing, private rentals and owner occupied homes.
- Contracts division supports the increasing demands of the new build market.
- One stop shop for each customer type.
- Over 4 million cabinets, 2 million doors, 1 million appliances, 2.5 million m<sup>2</sup> flooring.

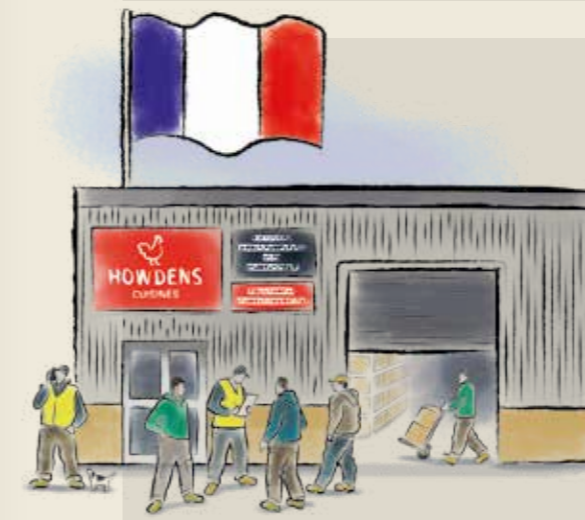
### Trusted by the trade

- Increasing customer expectations result in professionals being needed more and more.
- Our service to the builder is built on strong local relationships supported by our in stock model, depot manager autonomy and trade quality products.
- We support the trade with end consumer services - in-home survey, free planning and design service, in depot presentations and expert advice.
- All our products are tested to UK and Global standards and our accessories and appliances are tested to ensure they are easy to fit for our builder customer.
- One stop shop for all joinery and kitchen related products.



### Kitchen is the heart of the home

- Kitchens play a big part in the home and must be functional and social places.
- Kitchens need to be functional in small spaces.
- Kitchens need to be design-driven as they are constantly on show in open plan spaces.
- Our ranges cater for traditional, modern and niche looks whilst our appliances, storage options and kitchen accessories ensure the level of functionality demanded by today's consumer.
- Technology advances mean more focus on sustainability, eco-focus and time saving features.



### French market

- 29 million homes in France: 60% owned, 40% rented.
- Consumer spend switching into home improvement, as in the UK.
- Market starting to shift from DIY to 'Do It For Me' - just as it was in the UK when Howdens first started.
- Customers want everything quickly, and we're the only one who offers our range of quality and product from stock.

