

Indoor & Outdoor Furniture

Essential sourcing intelligence

June 2012

US\$100

India supplier profiles

Detailed profiles of 28 suppliers with verified manufacturing and export credentials

Product gallery

Specifications and full-color images of 158 top-selling export products ranging from sofa sets to swings

Industry trends

Coverage of current issues, plus insights into supply centers, products and pricing



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Global Sources is offering this series of *Developing Country Sourcing Reports* as part of its corporate social responsibility undertakings in partnership with The Kearny Alliance, a nongovernmental development organization whose mission is Aid through Trade.

The aim is to give international buyers new sourcing opportunities from experienced exporters, generating orders and creating lasting jobs in developing economies.

Supplier capability in India

INDOOR & OUTDOOR FURNITURE

Revitalized demand for wooden pieces is propelling the indoor and outdoor furniture industry in India. After suffering from sluggish exports over the past half-decade as a result of the global economic crisis, the sector exhibited strong recovery last fiscal year.

Besides wooden models, metal furniture is driving up foreign sales. Although a relatively smaller segment than the wooden line, it has recorded surging growth in recent years because of its popularity among customers in traditional markets.

The EU and the US are primarily driving demand. The former alone accounts for nearly one-half of total outbound shipments. Emerging destinations are also fueling development, with Australia and the UAE being the leading importers in the Asia-Pacific region and the Middle East, respectively.

Key findings

1. Prices of indoor and outdoor furniture are generally expected to increase over the next six months as a result of the rising cost of raw materials and electricity. Adjustments will be minimal, however, as the majority of manufacturers expect quotes to rise by no more than 5 percent.
2. The unstable availability of electricity in India is a major hurdle facing companies. With rolling blackouts affecting consumers for up to eight hours everyday, the viability of suppliers is diminished as most have to allocate funding for generators, fuel and overtime pay.
3. Exports over the next 12 months are expected to stay level despite higher product quotes and manufacturing costs. Steady recovery of the US economy and growing demand from alternative markets is predicted to sustain the industry's development.
4. The sector's best-selling products include space-saving models constructed in modular designs. Pieces usually come in wood such as teak and sheesham, which is a variant of rosewood endemic to South Asia. Metal furniture is typically made of domestically sourced aluminum and iron.
5. The state of Rajasthan is the primary sourcing center for wooden items. Products normally feature intricately handcarved motifs. Neighboring Uttar Pradesh is the main manufacturing hub for metal models. Plastic, bamboo and rattan types are also available and can be obtained from a number of locations throughout the country.

Objective, methodology & scope

This India Sourcing Report is part of a series designed to provide buyers with information on new products from export manufacturers in supply markets that specialize in handmade merchandise.

The Developing Country Sourcing Report series is part of Global Sources' corporate social responsibility initiatives. It is offered in conjunction with The Kearny Alliance, whose mission is Aid through Trade. The objective is to help create jobs in developing Asia through export promotion.

To produce this report, large, midsize and emerging manufacturers, all with substantial export experience, were surveyed. The selection of suppliers is designed to reflect the composition of the industry in India in terms of geographic location, materials used and range of products offered.

For in-depth profiles, our researchers

visited the facilities of each company and interviewed senior executives who discussed their recent performance and provided forecasts for the next 12 months. All other makers in this report were either visited or contacted by phone.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including a breakdown of exports by product type and market. Suppliers also participated in a survey designed to provide insight into the industry.

This report covers the main types of indoor and outdoor furniture available in India, including living room, bedroom, dining and kitchen, and garden and outdoor models. Each product category has its own price guide that describes the features of low-end, midrange and high-end high-end models.

In this report

- 16 in-depth company profiles
- 12 short company profiles
- 158 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics and charts

The Industry Overview section discusses key issues affecting export manufacturers. It provides insight on the composition of the industry and elaborates on the important supply centers within India.

The Products & Prices section details the features and price ranges of indoor and outdoor furniture. It also examines the design and manufacturing processes, main materials used, and sourcing centers where components are procured.

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Industry Overview

India's indoor and outdoor furniture industry is showing signs of improvement in terms of export performance. In fiscal year 2010-2011, the latest period for which official statistics are available, the sector posted its highest revenue in a half-decade. The growth is primarily attributed to the resurgence of demand for wooden models with antique designs.

Foreign sales in 2010-2011 jumped more than 49 percent to \$376 million. This marked a significant development over the years spanning 2007 to 2010, when revenue declined about 15 percent annually. With the country severely affected by the global economic crisis, the industry posted its lowest turnout in 2009-2010 at \$252 million.

The sector's recovery is the result of renewed interest in wooden furniture, which accounts for nearly 93 percent of exports. Last fiscal year, outbound shipments for this line amounted to nearly \$350 million.

Items made of stainless steel, aluminum and iron are likewise gaining popularity. Although metal models contribute only 5 percent to total foreign revenue, growth in this segment has been consistent, unlike those made of

wood or other components. In 2010-2011, sales of metal pieces doubled compared with the previous fiscal year's \$10 million. The surge is caused by growing demand from traditional overseas markets such as the US and the EU for midrange and upscale products that have contemporary and modular designs. Orders from South America, the Middle East and the Asia-Pacific region are also contributing to the line's progress.

The EU is the sector's primary market as it accounted for \$162 million last fiscal year. Seven of its members are among the 10 largest importers of India-made furniture, representing for \$113 million.

The US is another significant destination, contributing \$92 million in total revenue. Australia is the most important market in the Asia-Pacific, absorbing shipments worth \$13 million. The UAE is the leading importer in the Middle East as it accounts for \$11 million.

Estimates show that the industry recorded relatively stable foreign sales in 2011-2012 as it earned about \$90 million in the first quarter. This is a slight decline over the \$94 million posted the same period the previous year. Analysts are optimistic of sustained development, however, because of the steady recovery

Supplier summary

Suppliers surveyed	28
Export sales	\$46.3mn
Export ratio	99%
Capacity utilized	93%
Full-time employees	1,165

Data: All surveyed suppliers

of the US economy and growing orders from emerging destinations.

Competitive advantages

The indoor and outdoor furniture industry benefits from a number of strengths that help propel the sector forward.

First is the abundant supply of raw materials. India is home to some of the largest rainforests in the world, particularly in the central, northern and southern parts of the country. A variety of tree species are available, including teak, mango and mahogany. Haryana state is the major sourcing hub for sheesham wood, which is mostly used for cabinets and paneling.

Plastic and steel are available in the heavily industrialized Uttar Pradesh and Maharashtra states. Bamboo, rattan and other natural components can be procured throughout the nation.

Another competitive advantage



SUPPLIER MATRIX

Company * In-depth profile	Year established	Head office location	Ownership	Factory location(s)	Full-time employees	Part-time employees	ISO certified
██████	2009	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	45	60	Pending
██████	1980	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	80	120	Yes
██████	1996	Udaipur (Rajasthan)	Locally owned	Udaipur (Rajasthan)	20	30	Pending
██████	1982	Jodhpur (Rajasthan)	Locally owned	Jodhpur (Rajasthan)	40	65	Pending
██████	2002	Jodhpur (Rajasthan)	Locally owned	Jodhpur (Rajasthan)	30	50	Pending
██████	2006	Pune (Maharashtra)	Locally owned	Pune (Maharashtra)	25	40	Pending
██████	2007	Mumbai (Maharashtra)	Locally owned	Mumbai (Maharashtra)	40	50	Yes
██████	1990	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	32	45	Pending
██████	2004	Jodhpur (Rajasthan)	Locally owned	Jodhpur (Rajasthan)	70	100	Pending
██████	2006	Jodhpur (Rajasthan)	Locally owned	Jodhpur (Rajasthan)	40	80	Pending
██████	1992	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	70	100	Yes
██████	2000	Sangam Vihar (Delhi)	Locally owned	Sangam Vihar (Delhi)	18	25	Pending
██████	1998	Jodhpur (Rajasthan)	Locally owned	Jodhpur (Rajasthan)	150	200	Yes
██████	2001	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	40	60	Pending
██████	2008	Kirti Nagari (Delhi)	Locally owned	Kirti Nagari (Delhi)	13	20	Pending
██████	1996	Chennai (Tamil Nadu)	Locally owned	Chennai (Tamil Nadu)	40	50	Yes
██████	2005	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	60	100	Pending
██████	1981	Moradabad (Uttar Pradesh)	Locally owned	Moradabad (Uttar Pradesh)	50	100	Yes
██████	2001	Noida (Uttar Pradesh)	Locally owned	Noida (Uttar Pradesh)	18	25	Pending

A.F. Exports

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A.F. was established in 2009 and manufactures mostly living room furniture.

The EU is the main market, accounting for 65 percent of shipments. France, Germany, Poland, Sweden, Spain and the Netherlands are the important destinations there. Canada, Mexico and the US absorb one-quarter of exports. The rest is sent to Thailand.

The majority of orders are made under ODM basis.

The product lines include stools, dining room chairs, coffee and side tables, and consoles. The best-sellers are aluminum and stainless steel chairs. The company also manufactures lamps, mirrors and wall hangings.

The supplier targets all price segments. Quotes depend on the materials used and production complexity. Stools are offered between \$20 and \$30. Upscale coffee tables with glass tops are \$400 to \$500.

Stainless steel, aluminum and brass are the materials used. All are sourced

from Delhi and Uttar Pradesh state's Moradabad city.

A.F. has two designers who release 250 models annually. Samples are usually completed within seven days.

The company has a 7,000sqm factory in Moradabad. It is equipped with welding, molding and drilling machines procured from Delhi and Uttar Pradesh. All production processes are done in-house. The facility can roll out 1,000 pieces every month.

There are 45 permanent and 60 part-time employees. A five-member QC team checks raw material processing, assembly and finishing.

Cartons are normally used as packaging. The minimum order requirement is \$5,000. Delivery time is 30 days.

A.F. is a member of the Export Promotion Council for Handicrafts. It regularly attends the India Handicrafts and Gifts Fair. The supplier plans to expand its market presence in the Asia-Pacific region over the year ahead.

Capability

Materials used

Wood	Yes
Bamboo	No
Rattan	No
Plastic	No
Metal	Yes
Other	No

Exports by product

Living room furniture	60%
Bedroom furniture	10%
Dining & kitchen furniture	10%
Garden & outdoor furniture	20%

Exports by market

North America	25%
EU	65%
Europe (non-EU)	—
Asia-Pacific	10%
Middle East	—
Other	—

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Company facts

Year established	2009
Head office location	Moradabad (Uttar Pradesh)
Ownership	Locally owned
Factory location(s)	Moradabad (Uttar Pradesh)
Full-time employees	45
Part-time employees	60
ISO certified	Pending
Total annual sales (all products)	\$1,000,000

Sales & output: Indoor & outdoor furniture

Annual sales	\$500,000
Share of total sales	50%
Annual export sales	\$500,000
Total monthly capacity	1,000 pieces
Average monthly output	1,000 pieces
Capacity utilized	100%
Average monthly exports	1,000 pieces
Export ratio	100%
Major export customers	Antique Line (France), Rose's Store (US)

PRODUCT GALLERY

Living room furniture



A.F.
 (profile page 24)
Model: AF005
MOQ: 500 pieces
Packaging: Carton
Delivery: 30 days
Price: \$69.90
Description: Stool; stainless steel; 14x14x17in



A.F.
 (profile page 24)
Model: AF010
MOQ: 200 pieces
Packaging: Carton
Delivery: 30 days
Price: \$55.50
Description: Chair; wrought iron; with cushion; 16.5x16.5x39.5in



Atoz
 (profile page 26)
Model: AT007
MOQ: 200 pieces
Packaging: Carton
Delivery: 50 days
Price: \$180
Description: Square table; aluminum base and glass top; 20x16x24in



Atoz
 (profile page 26)
Model: AT008
MOQ: 100 pieces
Packaging: Carton
Delivery: 60 days
Price: \$210
Description: Coffee table; stainless steel base and glass top; 15x18x40in



Atoz
 (profile page 26)
Model: AT010
MOQ: 200 pieces
Packaging: Carton
Delivery: 50 days
Price: \$130
Description: Center table; stainless steel body and glass top; 18x18x26in



Bhandari
 (profile page 28)
Model: BE001
MOQ: 15 pieces
Packaging: Corrugated carton
Delivery: 60 days
Price: \$200
Description: Almira; teak body and glass panels; two bottom drawers; 115x55x180cm

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