



InterTradeIreland

TRADE & BUSINESS DEVELOPMENT BODY

GIFTWARE & JEWELLERY

An Ireland retail perspective

NOVEMBER 2000



Expansion of giftware category into homeware creates IR£450m market.

Record 6 million tourists offer excellent giftware potential in Republic.

Local manufacturers dominate supply chain (67% share).

Giftware exports exceeded IR£107m in 1999.

Giftware retailers experiment with e-business model.

Imported giftware offers better retail margins.

Increasing designer influence in giftware.

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InterTradeIreland,
Enterprise Ireland,
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Topline Summary

Category Definitions for the purposes of this report are:

- Glassware:** includes cut glass, crystal and contemporary ranges of stemware (lead based), and etched glass.
- Ornamental China:** including ceramic tableware, figurines and ornamental products made of china/porcelain.
- Pottery/Tableware:** mostly earthenware, but includes some wooden bowl and flatware.
- Jewellery and Silverware:** mostly Celtic jewellery and silverware (cutlery, table accessories, frames etc).
- Candles:** scented and unscented, beeswax, coloured and decorative candles
- Knitwear and textiles:** knitwear aimed at the tourism market as well as linen textiles, hats and accessories.
- Miscellaneous:** covers a wide variety of products which can include prints/publications, tapes/CDs, picture frames, leather accessories, food products, key rings, cookware etc.

Market Size

The giftware market in Ireland was worth **IR£450m** in 1999, or **£352m sterling** (Stg) at retail prices, and has more than tripled in size since 1994 when it was worth IR£123m.

Northern Ireland accounts for Stg£60m or 17% of the total market, against IR£373m in the Republic.

A sustained period of economic growth, the buoyant tourism market, and the expansion of the sector to include new categories are the key drivers behind the growth.

The market for giftware is forecast to grow at an average rate of 13% annually to 2001, with the market in the Republic projecting 14% growth against 7% in Northern Ireland.



'People are now buying giftware products for everyday use.

**Olive O'Connor,
Air Rianta**

Segmentation

In previous reports the giftware market has been split into two segments; ornamental products and tableware. Due to the expansion of the giftware category we have reclassified the segments; new categories include glass/crystal accounting for 28% of the market, ornamental china (15%), tableware/pottery (10%), knitwear/textiles (14%) and silverware/jewellery (12%). Candles have become an important sector and account for 5% of the giftware market. Miscellaneous items such as leather goods, prints and food products represent a further 16%.

Product Trends

Traditionally, the giftware sector in Ireland consisted principally of ornamental glass, china and tableware products. Contemporary giftware is less ornamental than previous designs and more functional for everyday use. This trend has caused the two main segments of the market to overlap and other important segments to emerge such as pottery, knitwear, jewellery, prints, leather accessories and candles.

A recent trend in the giftware market is the growing number of Irish manufacturers who have forged alliances with designers. These include Waterford Crystal (John Rocha), Tipperary Crystal (Louise Kennedy) and Newbridge Cutlery (Paul Costello). This trend is expected to increase and extend to other giftware segments.

'35% of our budget is spent outside Ireland, but this is increasing.

**Freda Hayes,
Meadows & Byrne**

Manufacturing

Based on estimates of domestic manufacturing output compared with CSO statistics on imports, Irish manufacturers' share of the domestic giftware market (North and South) is 67% of the value of supplies to the market. However retailers tend to enjoy better mark-ups on imported products and the Irish share at retail or consumer prices is likely to be closer to parity at 50% of market value.

Imports of ceramics and china, candles and jewellery/silverware are growing at the fastest rates. Based on CSO statistics (which must be treated cautiously due to SIC code classifications), giftware exports for selected categories exceeded IR£107m in 1999, up 23% on the previous year compared to imports of IR£65m in 1999.

Between them LEDU and Enterprise Ireland, have an estimated 350 client companies involved in giftware manufacturing. The Crafts Council of Ireland report over 3000 members most of which are micro enterprises and collectively account for an estimated IR£92m turnover. The Irish Knitwear Exporters Guild (IKEG) represents 29 knitwear companies with a collective turnover of IR£23m at manufacturers prices.

While Irish manufacturers' influence is visible in all segments, it is strongest in the crystal/glassware sector with a 90% share over imports. Other important sectors include knitwear, ornamental china, jewellery/silverware and pottery.

'Many Irish suppliers are pigeon-holed with too traditional designs.

Dixons, Coleraine

Retailing

Giftware retailing continues to experience substantial growth in Ireland. At the same time, the traditional retail structure has changed slightly.

Approximately 1,200 independent giftware/craft retailers are currently trading throughout the country. These include the larger well established players such as Blarney Woollen Mills, Kilkenny Design Centre, Avoca and the House of Ireland in the Republic and Wellington Giftware and the Gift Centre in the North.

Smaller traditional giftware/craft outlets continue to exist in the Republic, especially around the key tourist locations of Cork, Galway, Kilkenny and Dublin, yet in other peripheral locations, and in particular in the North, many of these small craft retailers have closed.

Multiple retailers, including Dunnes, Marks & Spencer and Next, have expanded their offer to include giftware, homeware and jewellery products. Habitat is also a highly significant player in this sector on both sides of the border and the majority of their giftware/homeware offer is imported from the Far East.

Advertising and Marketing

In 1999 giftware and jewellery attracted expenditure of almost IR£590,000 in Ireland, the majority of which is confined to crystal, and to a lesser extent china.

Advertising expenditure is dominated by retailers and the press is a popular media, especially for crystal.

'Irish knitwear manufacturers need to take more account of fashion trends, particularly on fabrics and shapes.

Blarney Woollen Mills

Future Opportunities

The market is expected to grow by 26% by 2001. This offers Irish manufacturers substantial opportunities to increase sales in both the domestic and tourism markets.

During the research period, the following product opportunities were identified:

- Knitwear/fleeces which appeal to Irish holidaymakers as well as overseas tourists.
- Distinctive pottery ranges for both the tourist and domestic market.
- Functional items of giftware such as candlesticks, bowls, lighting and home accessories which co-ordinate with other giftware/homeware ranges.
- Contemporary designs of silverware and jewellery at ranges in the medium price points (£20-£80).
- Occasional items such as picture frames, small tables and mirrors in natural materials such as wood, slate and ceramics.
- Contemporary designs of elegant crystal/glass stemware with less cuts and more original silhouettes.

Market Size

The giftware market is diverse and highly fragmented in Ireland. In recent years the distinction between giftware and homeware has become blurred and retailers have expanded their homeware offer to include giftware and vice versa.

This makes giftware a difficult market to quantify and define. In compiling the analysis of market size we cross-referenced a number of sources to determine a reliable figure. Details on the methodology and sources used to calculate the market size are contained in the appendix.

All Ireland giftware market at retail prices

In 1995, The Irish Trade Board/IDB/IFI published Giftware Market Opportunities which reported that the Irish giftware market at retail prices was worth IR£123m in 1994, of which £18m sterling was accounted for by Northern Ireland sales and IR£100m in the Republic.

At this time the giftware sector consisted primarily of ornamental china and crystal. The craft and textile sectors were relatively small, and the integration of giftware and homeware was still in its infancy.

In the last 5 years the sector has expanded to include a much broader range of categories, and a comparative analysis of historical trends would not be strictly valid, except in the case of glass crystal and ornamental china which have grown by 60% in 5 years to IR£195m.

Based on Irish manufacturers sales of IR£131m (which includes NI) and imports of IR£64m, the market value at trade prices is IR£195m. Applying an average mark up to retail prices of 2.3 on cost, the all Ireland Giftware market is worth just under **IR£450m**.

The regional breakdown between North and South is £60m sterling sales against IR£373 in the Republic.

ROI giftware imports at trade prices (IR£000 s)

	1994	1995	1996	1997	1998	1999	% 5 year change
Ceramic tableware/china ¹	3,732	6,666	4,291	4,038	5,816	14,895	299%
Pottery/earthenware ²	9,354	10,379	11,720	13,234	12,983	12,123	30%
Statues/ornaments ³	4,769	4,317	4,469	4,247	5,154	5,751	21%
Candles ⁴			1,973	2,379	3,068	4,563	131%
Glassware ⁵	11,148	13,152	14,142	13,877	14,740	19,990	79%
Jewellery ⁶	3,774	3,614	4,768	5,763	7,213	8,180	117%
Total	32,777	38,128	41,363	43,538	48,974	65,502	100%

Source: CSO Business Monitor
Stg£1 = IR£1.2775

- * Figures unavailable for 1994 and 1995, therefore % change calculated for the period 1996-99.
- 1 Covers tableware and kitchenware of porcelain and china
- 2 Covers ceramic household and toilet articles, including: of common pottery; stoneware; earthenware or fine pottery; other
- 3 Covers statuettes and other ornamental ceramic articles, including: of porcelain or china; of common pottery; stoneware; earthenware or fine pottery; other
- 4 Covers candles, tapers and the like, including: plain, not perfumed; other
- 5 Covers glassware, including: drinking glasses; glassware for table; other
- 6 Covers imitation jewellery of base metal, whether or not plated
- Figures have been rounded up where appropriate

ROI giftware exports at trade prices (IR£000 s)

	1994	1995	1996	1997	1998	1999	% 5 year change
Ceramic tableware/china	534	1,506	593	378	582	729	37%
Pottery/earthenware	3,093	2,946	2,858	3,340	1,123	1,086	(65%)
Statues/ornaments	1,043	1,385	1,992	1,507	1,096	806	(23%)
Candles			5	33	28	173	3360%
Glassware	48,738	44,298	56,115	62,497	65,139	84,736	74%
Jewellery	16,572	27,386	28,777	21,864	18,936	19,846	20%
Total	69,980	77,521	90,340	89,619	86,904	107,376	53%

Source: CSO Business Monitor

'We would spend more of our budget at home if innovation and competitive prices on contemporary ranges were in evidence.'

Irish Department Store

Northern Ireland is excluded from the above analysis as its trade figures are reported as part of the UK statistics.

Although no separate import/export figures were available for Northern Ireland, eight local buyers reported that they were spending at least 50% of their budgets in the home market.

Based on the CSO statistics, glassware imports have enjoyed considerable growth in the last 5 years, almost doubling in value to IR£20m. However, trade sources estimate that 75% of this figure consists of soda crystal rather than lead based crystal, leaving IR£5m as the truer value of crystal glass imports.

UK and European brands such as Dartington, Stuart, Swarovski and some Eastern European brands are strongly in evidence in the market. Irish glassware exports have grown by around 74% in 5 years with strong performances from Waterford, Galway, Tipperary and Tyrone.

Import sales of ornamental china and ceramics almost tripled in the last 2 years and are now worth almost IR£15m. This is thought to reflect the buoyancy of the homeware market and the success of key players like Habitat and Debenhams in the Irish market. Export growth has been more modest at 37% in 5 years.

The pottery and earthenware market has grown for imported goods by 30% in 5 years, and Irish exports have declined by 65%. Irish pottery suppliers are thought to be concentrating on the domestic market.

Imported jewellery and silverware has grown 117% in 5 years to around IR£8m, while Irish export sales have remained steady and grown 20% in the same period, from a much higher base (IR£16.5m).

Knitwear is an important giftware import although difficult to define separately from the overall fashion/knitwear market. CSO reports that all knitwear imports in 1999 were valued at IR£138m. According to IKEG estimates, around 10% of this figure reaches giftware channels, and competes with Irish knitwear production of £10m. The textile sector within giftware includes other products such as linen, scarves and accessories.

In summary, based on total imports of IR£63.5M (including knitwear), and Irish manufacturer's domestic sales of IR£131m at trade prices, almost one third of the Irish giftware market is supplied by imports.

Factors Affecting Growth

'We cannot depend on tourists and have to have broad appeal to the local market.'

Austins, Derry

The recent growth in the Irish market can be largely attributed to the health of the economy, growth in the tourism industry, the increasing Irish and international designer influence and overlap with homeware market.

Other factors that have influenced the giftware market in recent years are the NI peace process, which has affected tourism, punt/pound relationships and their effect on cross border trade, increased disposable incomes and the changing tastes of Irish consumers. The growth of the housing market has affected giftware sales less than other sectors such as furniture and housewares.

The health of the economy

The Republic of Ireland has experienced a sustained period of exceptional economic growth in the last five years with annual GDP growth of up to 8%. Despite recent EU Central Bank concerns about inflation levels, a soft landing for the Irish economy is predicted with further GDP growth of 7% in 2000.

Irish consumers spent £20 billion + through retail channels in 1999, and 2000 is expected to experience further growth in consumer expenditure. Significant numbers of expatriates are returning to Ireland to experience this new prosperity. This has a positive effect on the housing, tourist, giftware, furniture and clothing markets.

Further detailed analysis of Ireland's economic performance is available at www.esri.ie and in, "Ireland-A £20 billion+ Retail Market" which is available from Enterprise Ireland, IDB and LEDU.

Tourism

The tourism market has a positive effect on the sales of giftware throughout Ireland.

Tourism figures in the Republic are reaching record levels, with 6.07m visitors in 1999 and revenues of approximately £2,502m. Northern Ireland had 1.655m visitors during the same period and revenues of £265m. Per capita tourism expenditure in the north has been lower because visitors do not stay as long.

According to Bord Failte, tourist visits to the ROI have grown by 128% over the last decade.

Tourists from North America have the highest spend on shopping/giftware products in the ROI, whereas visitors from Great Britain have the highest spend in NI.

The tourism market is an important market for Ireland with figures continuing to soar in the Republic. Due to the new signs of stability in the North, considerable growth is expected in this market. This will provide opportunities for local giftware and jewellery manufacturers to supply their products to tourist focused retail and factory outlets.

Further information on the origin, profile, spending power and length of stay of tourist groups can be found in www.ni-tourism.com or www.ireland.travel.ie/home.

'We are always looking for a differentiated product, and not one that is available in every other giftware retailer.

Avoca

Irish/international designer influence

House/interior magazines and home design programmes, such as Changing Rooms, Home Front and Better Homes, have contributed to the increase in popularity of quality contemporary giftware items.

Many of the leading clothing designers are now switching their attention to designing giftware ranges including crystal, silverware and tableware. Leading designers involved in the Irish market include John Rocha (Waterford), Paul Costelloe (Newbridge Cutlery) and Louise Kennedy (Tipperary).

China and pottery manufacturers are expected to follow this trend and are beginning to involve designers on new product ranges, for example the Joan Millar and Stoneware Jackson alliance. This designer influence highlights the growing sophistication of the middle market Irish consumer. Modern designs of giftware ranges have encouraged the younger consumer to purchase crystal ranges which have often been thought of as 'too traditional' and old fashioned.

The designer influence is expected to continue and move into other giftware areas.

Other factors

- NI tourist market decline—the early boost in sales from the tourist market, which giftware and craft retailers experienced throughout Ireland after the first cease-fire in 1995 was short-lived, and the market is only slowly recovering now. The repercussions of this decline in sales resulted in the closure of many key giftware and craft outlets, most notably 11 Hoggs and Tom Jones outlets, which have been key players in the NI giftware market. Their share of the market has been split between the existing department stores, independent retailers or simply disappeared.
- Increased multiple involvement—in recent years high street retailers such as Debenhams, Marks & Spencer, Dunnes, Next and Habitat have increased their giftware offer in efforts to develop the market. In the NI market department stores such as Debenhams, Camerons and McKillens have benefited from the closure of Hoggs/Tom Jones and expanded their giftware offering in glass and homeware. Retailers who focus on ladieswear, such as Marks & Spencer, Next and Principles have been particularly successful in growing their share of the contemporary jewellery and giftware sector.
- Changing tastes of international buyers – the best attended Irish giftware/craft show is 'Showcase Ireland', held in January in the RDS. This trade show attracts approximately 2,200 overseas buyers from USA, Europe and the UK. These buyers are continually looking for 'new', 'innovative' contemporary designs in modern fabrics/materials. In order to remain competitive with European trends, Irish giftware manufacturers/designers must continue to attract international buyers with stylish simple designs with 'that magic sense of Irish style that will excite the imagination' – Frances Ruane, Crafts Council of Ireland.

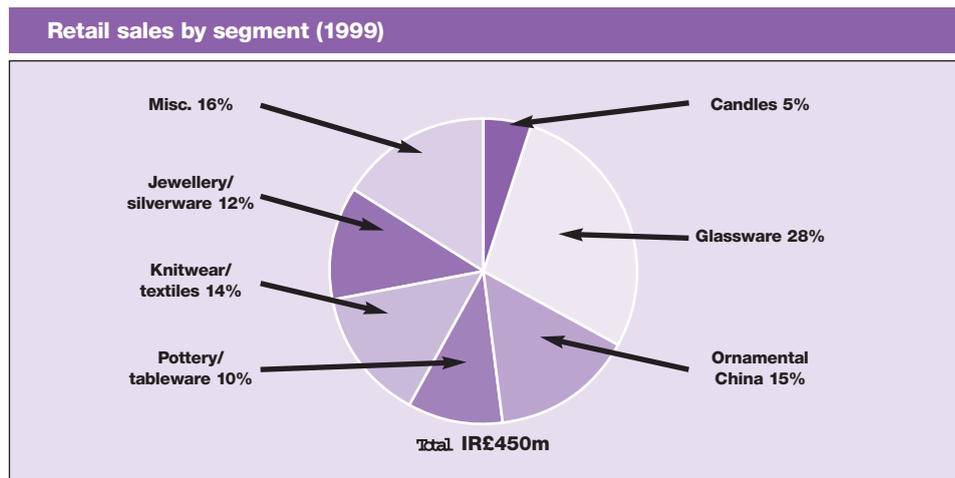
Market Segmentation

During the last decade, the giftware retail market in Ireland has expanded to include diverse new sectors and reached a broad cross section of consumers including overseas tourists, traditional/older customers, domestic tourists, wedding list market, and the occasional gift/homeware market.

Some retailers have elected to specialise in particular segments such as tourists (Blarney, Avoca) while others are more interested in the domestic giftware market (Kilkenny Designs, Equinox), or the homeware market (Meadows & Byrne, Habitat).

These changes have happened faster in the Republic than in Northern Ireland, probably due to the stronger tourism industry, but in both cases the giftware and homeware business has become closely integrated.

Consequently, the historical basis for segmenting the giftware market according to ornamental and tableware lines are no longer adequate, and we have redefined the giftware market based on the various sectors in the retail trade.



Regional Distribution of Sales

Categories	Retail market value IR£m	NI Sales £m Stg	ROI Sales IR£m	% of total giftware sales
Crystal/cut glass	126	17	105	28
Ornamental/china	69	9	57	15
Candles	22	3	18	5
Pottery/Tableware	44	5	37	10
Celtic Jewellery/ Silverware	53	8	44	12
Knitwear/ Textiles	64	8	52	14
Miscellaneous	72	10	60	16
Total	450	60	373	100

Source: PwC Research

‘There is a great need for existing and new Irish jewellery designers and manufacturers to communicate with retailers – they need to get a voice.

Design Yard

Product Trends

Within the traditional and new segments of the giftware market, there is a clear trend towards minimalist unfussy design, simpler silhouettes and more solid colours.

The ‘shamrock embellished’ traditional market remains important, particularly for the overseas tourist from the US, but this market is ageing and is likely to be displaced by more contemporary design reflecting modern Ireland.

Specific product trends within each of the segments are summarised below:

Crystal/glassware

Worth an estimated IR£126m in 1999 at retail prices, this segment has been affected by the lifestyle changes of consumers. Individual usage of glassware and crystal has changed and consumers are now using more of their crystal and china products in everyday living rather than keeping them locked away in cabinets. A good example of this is Waterford Crystal and Belleek Pottery who have focused on ‘functionality’ in their ranges.

Designer influences from Louise Kennedy and John Rocha have revamped the crystal/glassware market. The widespread media advertising by both Waterford and Tipperary Crystal of these alliances has generated new interest in contemporary crystal products, especially among the 25-40 year old professional market.

The consumer is increasingly conscious of brands in this area, with designer names taking over from the manufacturers. Many consumers may prefer to say they have just purchased a “Louise Kennedy” centrepiece rather than a piece of Tipperary Crystal. Interestingly, manufacturers report that sales of contemporary ranges are strongest with domestic consumers rather than tourists who prefer the traditional heavier cut ranges.

Other popular contemporary crystal brands include Swarovski and Dartington, Jerpoint and Val St Lambert, which are widely available in department stores and seem to be aimed at the domestic market.

Glass centrepieces, vases and stand alone pieces are an important and growing part of the cut glass market, since younger consumers are less ‘suite’ or collection orientated and are content to mix and match ranges.

Ornamental China

This segment is worth IR£69m at retail prices and thought to be fairly stable at this level. The market consists of fine bone china and porcelain figurines/ornaments.

Waterford Wedgwood, Royal Doulton, Donegal Parian, Belleek Pottery, Aynsley and Royal Tara are the principal brands in the sector and they are focussed on the tourist or traditional market offering delicate figurines and ornamental china.

Leading European and British china suppliers have attempted to attract younger customers through designer alliances; Rosenthal, Villeroy and Boch are conspicuous in this sector.

'The table top market was dead, but new pottery and ceramics ranges have given the market a new lease of life.'

The Gift Centre

However, the general decline in formal dining and collecting ornaments among consumers has inhibited development of the sector in Ireland. Despite this, there has been growth in the non-china figurine market driven by brands such as Genesis, Island Turf Craft and others, demonstrating that there is still demand for ornaments.

Future opportunities will depend on innovation and attracting new customers to the sector. The extent to which this segment has declined can be summarised by one Northern Ireland retailer:

'We no longer carry stocks of any ornamental china ranges and only order in to customer requirements.'

Tableware/Pottery

This segment is worth IR£44m at retail prices (1999) and is one of the principal causes behind the decline/stagnation in the ornamental china market.

More frequent casual dining, flexibility and creativity in design, as well as attractive price points have helped to grow the tableware and pottery sector. This growth has partly been at the expense of the ornamental ranges.

Individuality is the key product trend in this sector and 'local' ranges with stories or a character behind them have enjoyed success in the Irish market. Examples include Louis Mulcahy, Stephen Pearce and Stoneware Jackson.

Vases, lamp bases, serving dishes and artistic centrepieces are as important as the standard serving sets and can generate much higher value sales.

Royal Doulton, Denby and other regional British pottery are also widely available in Ireland, although marketed on a more standard range commercial basis.

Pottery and tableware have become everyday usage products in many Irish homes so functionality factors such as durability, dishwasher proof and ovenproof features need to be promoted. Continuity of range is also important for replacement purchases.

The pottery/tableware offer also includes wooden bowls and serving dishes which have become a small but distinctive part of a good tableware offer.

The core customer for a pottery/tableware offer is the indigenous giftware consumer rather than overseas tourist, so design and product trends should reflect their tastes.

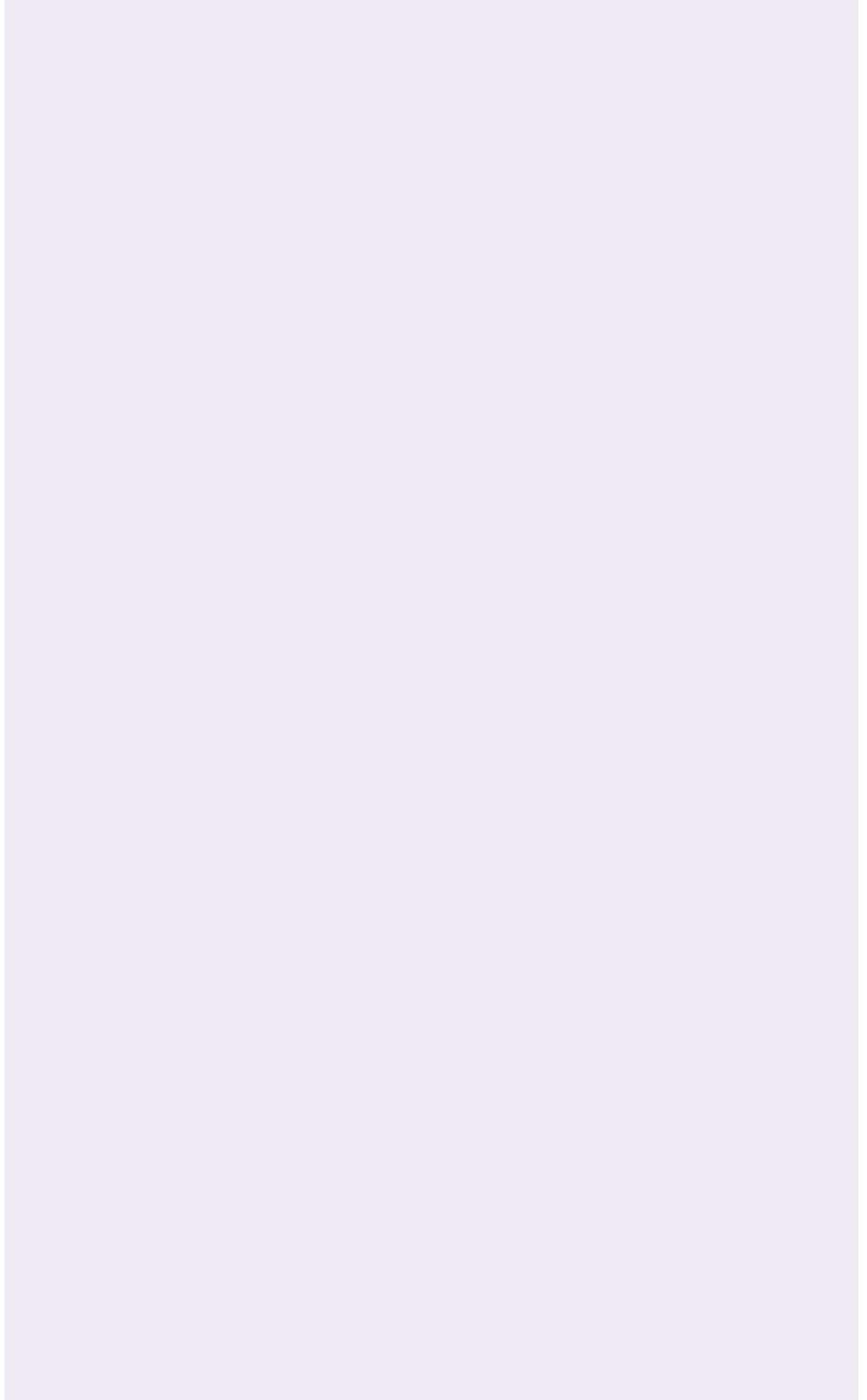
Celtic Jewellery/Silverware

Jewellery and silverware are gaining an increasing share of the Irish retail giftware market and offer attractive margins in return for limited display space. The segment is also served by the conventional jeweller and is thought to be worth IR£53m in 1999.

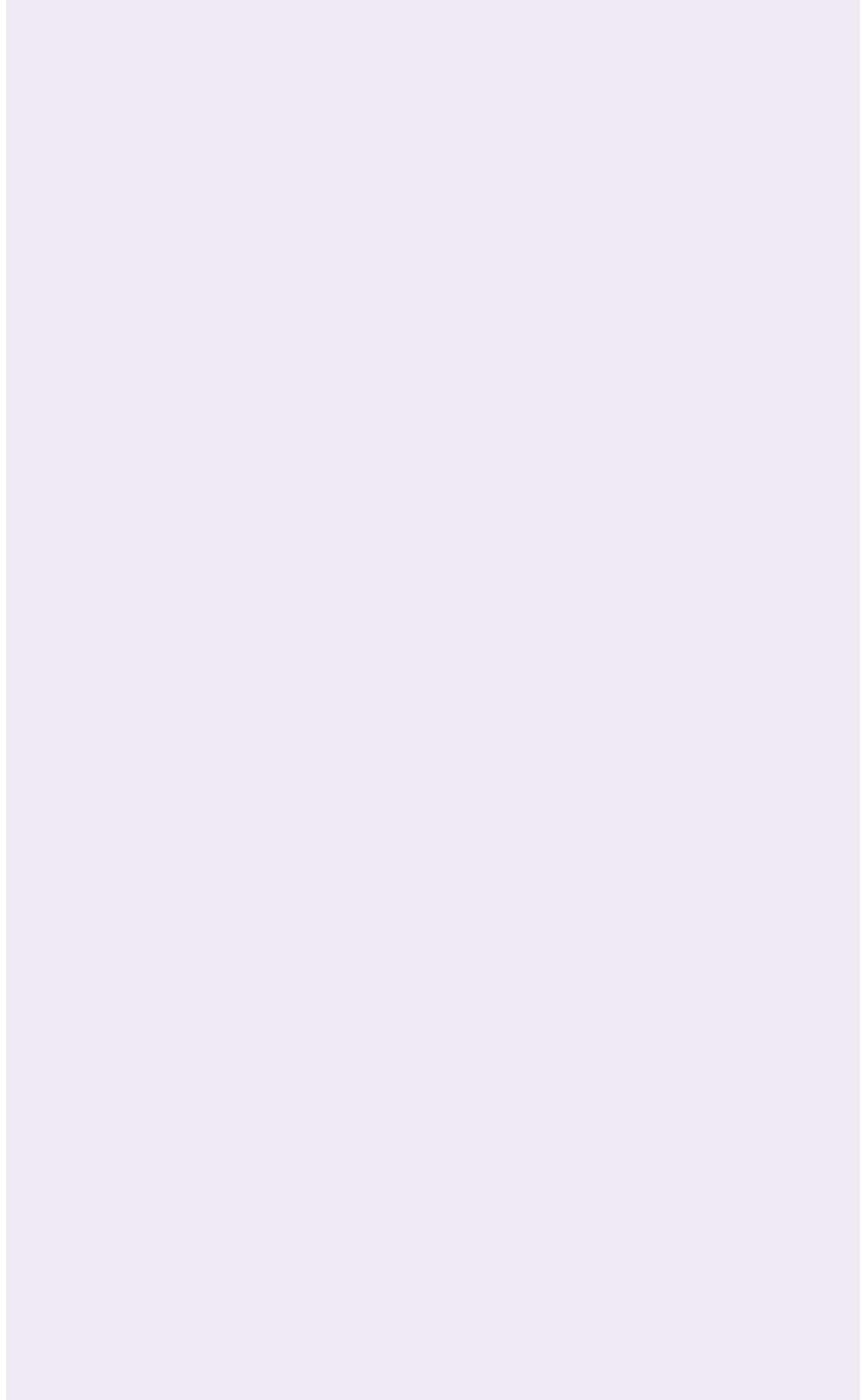
The core offer tends to consist of silver plated Celtic influenced jewellery, pewter tankards, candlesticks, photo frames, table accessories and watches.

Price points tend to be at the more affordable end of the jewellery market (less than £100) and silver or silver-plated metals are the main materials. Amber jewellery has also become fashionable in recent years.

Notes



Notes



Market Sources

Industrial Development Board for NI:	Market Opportunities in Ireland 1995–ABT/IDB/IFI Gifts, Table Top & Jewellery 1999
Enterprise Ireland:	
LEDU:	Giftware Excellence in NI 1999
Key Note:	Jewellery, Watches and Fashion Accessories, September 1999 Giftware in the UK, January 1999
Mintel:	Jewellery and Watches Retailing, May 1999
Trade Press:	The International Gift Buyer
Northern Ireland Tourist Board:	
Retail Verdict UK, August 1999:	
Crafts Council of Ireland:	
IBEC, Irish Business and Employers Confederation:	
Federation of Jewellery Manufacturers of Ireland:	
Central Statistics Office Reports:	Import/Export Statistics
Family Expenditure Survey:	
Household Expenditure Survey:	

Useful Web Sites

Enterprise Ireland:	www.enterprise-ireland.com
IDB:	www.idbni.co.uk
LEDU:	www.ledu-ni.gov.uk
Central Statistics Office:	www.cso.ie
PricewaterhouseCoopers:	www.pwcglobal.com
Jewellery Distributors Association:	www.teq.co.uk
The Irish Craft, Fashion and Giftware Trade Directory:	www.craftireland.com
Yellow Pages (NI):	www.eyp.co.uk
Golden Pages (ROI):	www.goldenpages.ie

Key giftware retailers in Ireland

Type of Outlet	Name	Locations	Number of Outlets	Buyer/owner	Telephone No.
Independent retailers	Quills Woollen Market	Kerry(3) & Cork(3), ROI	6	Padraig Quill	00 353 21 271717
	The China Shop	Ballymena, NI	1	Mrs Dixon	00 44 28 2564 2427
	The Crane Gallery	Ballymena, NI	1	Deirdre McKendry	00 44 28 2564 0569
	The Gift Centre	Ballymoney, Larne, Lisburn, Limavady, Lurgan, Magherafelt, NI	6	Donna Lyttle	00 44 28 9266 7733
	The Treasure Chest	Galway, ROI	1	Mary Bennett	00 353 9 156 3862
	Thomas Jewellers	Belfast, Londonderry, NI	2	David Thomas	00 44 28 9024 3079
	Tierneys Gift Shop	Dublin, ROI	4	John Tierney	00 353 1 478 2873
	Wellington Giftware	Belfast & Ballymena, NI	2	Joan Alexander, Willie Alexander	00 4428 9032 5932

Methodology

In determining the market size for Giftware in Ireland a number of sources were cross-referenced.

CSO Giftware import/export statistics – which do not cover giftware specifically, but include related categories;

Enterprise Ireland, LEDU and IDB Irish manufacturing statistics, which relate only to their clients and depend on the accuracy of the client companies submissions;

Reports from the Crafts Council of Ireland, Irish Knitwear Exporters Guild and the Irish Glass Federation;

Interviews with leading Irish retailers who provided indications of local market size, expenditure on Irish manufacturers and imported goods; and

Previous reports commissioned or published by the agencies such as Giftware Market Opportunities in 1995.

Appendix

Key giftware retailers in Ireland

Type of Outlet	Name	Locations	Number of Outlets	Buyer/owner	Telephone No.
Department stores	Arnotts	Dublin, ROI	3	Ms S. Brady	00 353 1 805 0401
	Austin & Co	Londonerry, NI	1	Ann McGuinness	0044 28 7126 1817
	Brown Thomas	Dublin, Limerick, Cork, Galway, ROI	5	Jimmy Wynne	00 353 1 605 6666
	Clery & Co	Dublin, ROI	4	Mary Tracey/ Noel McMenamin	00 353 1 878 6000
	Debenhams	Belfast, NI Dublin, ROI	2	UK buyers (London)	00 44 20 7408 4444
	Marks & Spencer	NI (7) ROI (4)	11	UK buyers (London)	00 44 20 7935 4422
	Roches Stores	ROI (11) NI (1)	12	Alan Morgan	00 353 1 872 6500
	Smyth & Patterson	Lisburn, NI	1	Dennis Mahood	00 44 28 9266 270
Airport Duty Free	Belfast Intl. Airport – A Taste of Ulster	Belfast, NI	1	Michael O'Hagan	00 44 28 9442 2888
	Dublin Airport – Aer Rianta	Dublin, Cork, Shannon, ROI	3	Lisa Martin (jewellery) Olive O'Connor (giftware)	00 353 1 814 5314
Independent retailers	Amethyst	Dublin, ROI	2	Barbara Ward	00 353 1 679 3660
	Avoca Handweavers	Bunratty, Connemara, Kerry, Wicklow, ROI	6	Jill Moss	00 353 1286 7466
	Blarney Woollen Mills	Dublin, Cork, ROI	3	Mary Morrissey	00 353 21 385280
	Chinacraft Newtownabbey,	Belfast, NI	2	Victoria O'Hara	00 44 28 9085 1078
	Craftworks	Belfast, NI	1	Patricia Flanagan	00 44 28 9024 4465
	Fallers Galway,	ROI	1	Bernadette Faller	00 353 9 156 1226
	Fields Jewellers	Dublin, ROI	8	Gerry Bohan	00 353 1 478 0799
	Fulton's Fine Furnishings	Belfast, Enniskillen, Lurgan, NI	3	Keith Irwin Cyril Fulton	00 44 28 3831 4600
	House of Ireland	Dublin, ROI	2	Grace Galligan	00 353 1 460 4300
	Kilkenny Design Centre	Kilkenny, ROI	1	Marie Doyle	00 353 56 22118
	Meadows & Byrne	Bunratty, Cork, Dublin, Galway, ROI	4	Freda Hayes	00 353 21 344100

Designer influences, either through licensing opportunities or by developing internal design resources will help achieve this. This has been particularly successful in the crystal segment, where contemporary designs account for up to 10% of the market (IR£12M).

Less width and more depth

In terms of retail distribution strategy, local manufacturers should focus on fewer, well chosen and well-supported retail accounts which yield better returns than numerous accounts buying a minimum range of products. Accounts should be selected on the basis of regional spread, compatibility with brand positioning, consistency on pricing and margin and high standards of merchandising and display.

In return manufacturers should offer exclusivity (geographically or for particular ranges), product training and merchandising support, minimum performance criteria and contribution to promotional costs.

Marketing support

Giftware retailers consider loyalty and exclusivity to be key forms of marketing support from Irish suppliers. Assistance with advertising material and merchandising is also welcome.

Retailers require local manufacturers to provide them with good packaging, labelling and promotional material. Involving key retailers in new product development, sales training, merchandising and promotional activities have also been noted as excellent ways to support and improve retailer/manufacturer partnerships.

Follow Fashion!

Irish giftware companies must research international trends/influences at various trade shows in order to adapt their designs to a changing marketplace and remain competitive. The giftware market is following fashion, and innovation is essential in both product range and technology issues. The Crafts Council for Ireland, LEDU, IDB and Enterprise Ireland offer assistance to new Irish manufacturers, helping them to handle such issues as design capability, sourcing, capacity issues and skills shortages.

Focus on the consumer

Lifestyle changes of the Irish consumer will continue to affect how purchases are made and how frequently they occur.

It is important for local suppliers to keep updating ranges according to what the Irish consumer wants. Trade shows and trade press which are not entirely giftware focused such as interior design, furniture or houseware can be valuable sources of inspiration.

Competitor trends can be observed by visiting factory/visitor centres and tourist locations throughout the country. By viewing key product ranges on display, local manufacturers can follow the trends/purchasing patterns of specific visitors.

Future Outlook and Recommendations

Giftware market forecast

	1999		2000		2001		% change
	£m	IR£m	£m	IR£m	£m	IR£m	
NI	60	76.5	64.5	82	69	88	+15
ROI	292	373.5	333.5	426	375	479	+28
All Ireland	352	450	398	508	444	567	+26

Source: PwC estimates, retailer interviews
 Stg£1 = IR£1.2775
 Figures have been rounded up where appropriate

The Irish giftware market is forecast to grow by an average 13% annually to 2001. Growth in the Republic is almost double of that in NI at 14% and 7% respectively. Due to the number of merchandise categories now being offered by giftware retailers, it is difficult to market in isolation from other sectors such as homeware, clothing and furniture.

The Millenium celebrations had an impact on giftware sales in 1999/2000 with many manufacturers producing special ranges for the occasion. On top of this the tourism sector performed at record levels and this will have affected 1999/2000 giftware performance. The extent to which these factors can be sustained will have an impact on growth in the sector.

Irish manufacturers' share of the home market is at risk unless local companies can adapt with the changing trends in the market place and produce a differentiated product.

Product opportunities

Quality pottery ranges in a variety of colours/textures for both the tourist and domestic markets (preferably dishwasher proof).

Contemporary designs of elegant crystal/glass stemware.

Functional items of giftware such as candlesticks, bowls and lamp bases in ranges of china, earthenware, stone and wood – natural materials are very popular.

Occasional items such as picture frames, candles and prints/publications. The market for mirrors has been completely revamped and contemporary ranges in slate, wood, silver and pottery are in demand from upmarket giftware retailers.

Silver tableware products in minimalist modern designs, such as Newbridge Silver. Popular items include napkin holders, picture frames, pen sets and tableware accessories.

Modern silver jewellery designs at medium price points.

Contemporary designs

Simplicity, functionality, affordability and contemporary design are common elements of the most successful ranges in the market today. To satisfy European buyers and the evolving domestic customer, there is a need to supplement traditional ranges with a more contemporary offer as this is where the market is growing.

Trade Fairs

Visiting both local and overseas trade fairs/exhibitions can be beneficial both for retailers looking for new product ranges and also local manufacturers looking for European influences and contemporary new designs.

Giftware

- Showcase Ireland (January)
- Scotland's International Gift Fair (January)
- Spring Fair (February)
- Gift Trade Fair (February)
- Scottish Spring Gift Fair (February)
- Harrogate Gift Show (February)
- Maison & Objet, Paris (January)
- Trendset Exhibition (January)
- New York International Gift (January)
- Chicago Gift Show, Chicago, USA (January/ February)
- Boston Gift Show (March)
- The CGTA Gift Show (January/February)
- Ambiente, Frankfurt (February)
- Tendence, Frankfurt (August)

Jewellery

- Gifts, Jewellery & Watches Trade Fair (August)
- International Jewellery Show, London (September)
- BASEL, World Watch, Lock & Jewellery Show (March)
- Iberjoya, International Jewellery & Fashion Accessories (January)
- Inhorgenta Munchen, Munich (February)
- Jewellers International Showcase (October)
- IFBS International Fashion Boutique Show (January)

Merchandising/interior design

Assistance with merchandising is reported to be poor from Irish suppliers and this is an area of growing importance for retailers. Consumers are now more sophisticated and require increasing amounts of assistance with practical design solutions for their homes. Manufacturers must work closely with retailers to address their needs in this area through in store displays and assistance with design concepts. Fulton's Fine Furnishings are particularly good at this and offer a full design/consultation service to consumers.

Advertising and Promotion

In 1999 giftware and jewellery attracted IR£590,000 of advertising support throughout Ireland.

The most heavily advertised brands are crystal glassware. However, in Northern Ireland the bulk of the media advertising comes from jewellery retailers, particularly Joseph Rea.

The biggest advertising campaigns tend to include TV, radio and occasionally cinema, although press has been used for crystal.

Whilst not included in the analysis, outdoor advertising is also used for the major china and glassware brands.

However, with advertising expenditure largely confined to crystal, watches and, to a lesser extent china, this is not a market where heavy media support is the norm.

The key consumer magazines which advertise giftware in Northern Ireland and the Republic are The Irish Tatler, The Ulster Tatler, Ireland's Homes Interiors & Living, The Northern Woman and Elegant Homes.

Irish retailers expect local manufacturers to focus their promotional activity on the following forms of support:

Brochures and promotional materials

One area which Irish manufacturers fall behind their European counterparts is the lack of brochures and point of sale material which are available for the customer.

Although many Irish manufacturers have made improvements in this area, the availability of promotional material is crucial for most giftware retailing.

Web sites/e-Business

Giftware customers outside Ireland frequently use the internet to identify and source giftware items, making prices more transparent. This is particularly popular with US customers who will browse the various Irish sites and the web offers an important new channel for export sales.

Internet purchases of giftware have been slower to take off in Ireland and many domestic customers still prefer to purchase items in the retail outlets rather than through the virtual outlet. Further information for manufacturers and assistance with e-Business related matters can be obtained from Enterprise Ireland, the Industrial Development Board for NI and LEDU.

Product knowledge and training

In the complex areas of china and crystal, manufacturers must regularly update their key retailers on new product ranges and designs.

Factory visits and product demonstrations are also beneficial and help to update retailers on new developments and upcoming events.

* Irish share of retail sales may be less due to better mark-ups on imported goods.

Category	Retail Value IR£m	Import Share (%)	Irish Share* (%)	5yr Import Growth (%)
Cut glass/crystal	126	9	91	79
Ornamental china	69	67	33	299
Pottery/tableware	44	63	37	30
Jewellery/silverware	53	38	62	117
Candles	22	47	53	131
Knitwear/textiles	64	50	50	NA
Miscellaneous	72	NA	NA	NA
Total	450	33	67	100

Import growth has exceeded market growth rates in ornamental china and jewellery/silverware.

Irish manufacturers have grown new markets in pottery/tableware, knitwear/textiles and miscellaneous categories such as home accessories, leather goods, and print.

Role of Agents

The majority of Irish giftware manufacturers service their retail accounts directly or via a network of sales representatives. However, the UK and overseas giftware manufacturers tend to rely on agents to service the Irish market.

A number of large trading companies have developed locally as a result, such as Emerald Trading and Shannon Distributors specialising in imported giftware.

Manufacturers in Ireland

The principal Irish giftware manufacturing firms mentioned by the retailers we spoke to at the time of the review are listed below:

Irish Manufacturers				
Glass	Pottery	China	Other	Jewellery
Waterford Crystal	Nicholas Mosse Pottery	Belleek Pottery	Genesis Fine Arts	J & Z Blackman Ltd
Galway Irish Crystal	Stephen Pearce	Donegal Parian China	Island Turf Craft	Solvar
Tyrone Crystal	Eden Pottery	Royal Tara China	Rathborne Candles	Tara Jewellery
Tipperary Crystal	Ballydougan Pottery	Irish Dresden	Newbridge Cutlery	TJH Ltd
Duiske Irish Glass	Stoneware Jackson Pottery	Cre Irish Porcelain	The Ryanhart Collection	Jewel Art
Killarney Crystal	Judy Greene Pottery	Pottery by Hammersley	Boramic candles	Reaction
Jerpoint Glass Studio	Carrigaline	Irish Tabletop Group	Mullinger Pewter	The Steensons
Cavan Crystal			Avoca Handweavers	Newbridge
Dublin Crystal			Four Courts Press	
Celtic Glass			Riverside Arts Ltd	
			Ferguson's Irish Linen	
			J C Walsh & Sons	
			Blarney Stone Enterprises	

Source: PwC industry interviews

Over 350 giftware and jewellery companies are in operation throughout Ireland.

Further information and full company listings of Irish giftware/jewellery manufacturers can be found in the following:

- LEDU – 'Giftware Excellence in NI', 1999
- Crafts Council of Ireland – 'Showcase Ireland Catalogue'
- Enterprise Ireland – 'Gifts, Tabletop and Jewellery', 1999

Irish giftware manufacturers supply approximately 67% of the domestic market at trade prices. The Irish share at retail is likely to be less due to the higher mark-up imported giftware attracts, thought to be up to 3 and 4 times the cost. This would mean that the Irish share of the market at retail prices is reduced to 50% or less.

Shares vary from sector to sector (see table below) but where they have declined it is being blamed on the slow pace of innovation among Irish giftware manufacturers. It is also widely believed that giftware retailers can enjoy higher mark-ups from imported products and do not face the same levels of competition from other retailers, making imports more attractive.

Irish manufacturers have been losing ground to importers and have not reacted quickly enough to opportunities created by a buoyant tourism market and the integration of giftware and homeware.

However, it is important to look at individual segments to understand these trends more fully.

'The move is away from the typical Irish stereotypes towards a more design led innovative product aimed at the mass market but still with a high level of quality.

Logans

Smaller traditional giftware/craft outlets continue to exist in the Republic, especially around the key tourist locations of Cork, Limerick, Killarney, Galway and Dublin. Elsewhere these smaller retailers have either closed down or diversified to include a wide variety of homeware or furniture products.

General retailers such as Debenhams, Brown Thomas and Clery's have the added advantage of being able to display complementary ranges and apply cross category merchandising. This involves displaying giftware items in other departments such as furniture, textiles and clothing and vice versa.

Multiple retailers, including Next, Habitat, Marks & Spencer and British Home Stores are also expanding and introducing more homeware/giftware items. Traditional grocery retailers such as Dunnes and Tesco have started to expand their giftware and houseware ranges.

Traditional jewellery retailers have expanded their product offering to incorporate many giftware lines such as crystal and china, silverware and Celtic jewellery.

Furniture and homeware stores such as Fultons and Meadows & Byrne have seen the obvious synergy that giftware/homeware and furniture retailing offer, particularly from a merchandising perspective, and have moved into this category.

A popular distribution channel for the tourist market is **factory shops or visitor centres**. These are usually owned by local giftware suppliers and are based at the point of manufacturing. Key players throughout Ireland such as, Waterford, Belleek, Donegal Parian, Tyrone, Galway, Tipperary and Nicholas Mosse have all set up successful factory outlets.

The **internet** lends itself well to Irish giftware sites aimed at overseas markets. Popular Irish giftware sites include **somethingirish.com** and **Celticlinks.com**.

However, there is little evidence that the home market is using the web for giftware trading. Some moves in the direction of web site development have been made by key players in the Irish jewellery market. Costello's Jewellers in the Republic of Ireland closed down and was reborn via the internet. Also, Adornis is an Irish based multi-million pound jewellery site which was launched earlier this year.

Arnotts Department Store have also developed their own web site based on the success of their catalogue, and believe the potential for homeware and giftware trading on line is excellent, especially for customers outside Dublin.

A table in the appendix highlights the key giftware retailers in Ireland. Due to the large numbers of retailers which exist in this sector in Ireland, it would be impossible to list them all.

Retail Trends

Changes in the giftware retail structure are evident throughout the island of Ireland.

Giftware can be purchased through a variety of channels. The most popular are listed below:

- Independent giftware retailers
- General retailers/department stores
- Multiple retailers
- Jewellery retailers
- Furniture and homeware stores
- Factory outlets
- E-tailers
- Tourism/visitor attraction

Approximately 1,200 **independent giftware and craft retailers** are trading in the Island of Ireland. Performance varies enormously and some businesses are run as a sideline/hobby rather than on a purely commercial basis.

The more professional giftware outlets report sales per square foot of £300-£400, and mark-up averages 2.3 times the cost of goods including VAT.

Better end outlets find themselves competing with amateur players who have limited overheads. This is driving buyers away from the Irish supply base who do not offer exclusivity towards importers who do.

Based on research among better end giftware outlets in Ireland aiming at the tourist, domestic tourist and homeware market, the typical retail sales mix would be broadly as follows;

Typical Giftware Retailer Sales Mix		
Category	% Of Sales	Trends/Direction
Glass/Crystal	26%	Contemporary offer
China/Porcelain	19%	Strong Brands
Stoneware/craft/pottery	13%	Irish dominance (local)
Cutlery/Flatware	2%	Limited offer
Textile/Knitwear	25%	Tourist with contemporary offer
Jewellery/Silverware	5%	Celtic/Contemporary
Prints/Miscellaneous	2%	Local interest
Other miscellaneous	8%	Lighting/candles/cookware

Cut glass and ornamental china, which once accounted for up to 75% of sales now only represents less than half the sales turnover in the best performing retail outlets. There are still plenty of specialists, and in particular the factory outlets which will have more of a category focus, but the general trend is towards a wider offer.

Food products

Typical Irish food products such as fudge, jams, marmalades, sauces, salmon, soda bread, fruit cakes, honey, chocolates, etc are increasingly being sold by giftware retailers.

Although all retailers may not have the facilities to sell smoked salmon, the majority of outlets throughout Ireland will stock certain food products. This trend has been fuelled by the growing number of international travellers who are willing to try new products and seek to bring home new Irish 'tastes'.

Key giftware brands in Ireland

Glass	Pottery	China	Clothing & Textiles	Other	Jewellery
Waterford Crystal Tipperary Crystal	Carrigaline Nicholas Mosse	Nao Lladro	Avoca Blarney	Genesis Fine Arts Rynhart	The Steensons Brian de Staic Jewellery
Galway Crystal Tyrone Crystal Duiske Failte Dartington Crystal Edinburgh Crystal	Suzanne May Louis Malcahy Stephen Pearce Michael Kennedy Eden Pottery Stoneware Jackson	Wedgewood Mason Irish Dresden Duffy Dolls Ceramic Sculptures Belleek Pottery	Fishermen Ireland's Eye Guinness Fergusons Bairds Ulster Weavers	Newbridge Oneida Alessi Adonis Mullinger Pewter Colony	Rennie Mackintosh Tony Godson Molians Declan Killen Maureen Lynch Newbridge (silver jewellery) Ogham TJH Ltd
Swarovski		Donegal Parian	Porterhouse	Ashridge Photo Frames	Ingra Reed Ora Contemporary Jewellery
Jerpoint Killarney		Royal Doulton Royal Tara	Hats of Ireland Magee	INTI Leathers Rathbourne Candles	Tara Solvar The Book of Kells Children of Lir
Stuart Dublin Crystal		Cre Irish Porcelain Villeroy & Boch Staffordshire Tableware Spode Rosenthal China Royal Worcester Denby Aynsley Churchill China	Henry White	Cloverleaf J C Walsh	

* bold denotes Irish manufacturers
Source: Retailer Interviews, PwC estimates

'Irish giftware suppliers are not professional enough. They do not protect their retailers and sell to anyone direct.'

Wellington Giftware

Candles are an important segment within the giftware sector and are predicted to increase, especially the scented candles. Key brands include Northern Candles, Rathborne Candles, Rosalind Walsh, Boramic Candles and Kinsale Candles.

Tea lights have been reinvented and many popular holders are designed to fit the tea light candle. Millennium candles were a major focus for many suppliers.

Miscellaneous

The miscellaneous category is the most difficult to define, because of the large number and variety of craft businesses in Ireland. The Crafts Council estimate that there are somewhere in the region of 3000 micro enterprises making everything from carved wooden ornaments to homemade chutney. Cookware and occasional furniture, leather goods, incidental lighting, CDs/tapes and books can also be found in the larger giftware retailers, while postcards, key rings and small souvenirs are a small but important part of the point of sale offer. Comments on some of the more important products trends in the miscellaneous category follow.

Lighting

Increasingly lamps and smaller lights are being introduced as part of the giftware offering. Simple designs with a range of modern shades and bases are popular. Pottery manufacturers such as Louis Malcahy and Stephen Pearce have introduced a range of lamp bases to their ranges. These have proved popular with both the tourist and domestic markets. Chrome lights have experienced significant sales growth. This segment is small at present yet is set to expand.

Leather goods

An increasing amount of leather products are being introduced to our homes in the form of giftware, homeware products and furniture products.

Leather handbags, belts and wallets are increasingly being sold through giftware outlets and companies such as Holden and Tula have been successful in the Irish market. Leather coasters, candleholders, napkin rings and wall hangings have also made their way into upper market giftware shops.

This segment is forecast to expand with the clothing designer influence moving into the accessory and giftware markets.

This will be an important sector for Irish suppliers of leather products.

Prints/publications & postcards

This has become an important segment within giftware outlets and historic books on Ireland, cookery books and tourist focused publications are the most popular.

Prints from artists like Phillip Gray, either framed or unframed are extremely popular. The subject matter is typically houses, gardens and tourist locations throughout Ireland.

The postcard offer has also improved generally and artistic cards, greeting cards and larger and more expensive cards have been added to the basic holiday card.

'Giftware suppliers must be able to provide a quality Irish made product to suit both the international and domestic traveller.

**Olive O'Connor,
Aer Rianta**

Many designs are Celtic influenced using early christian motifs and symbols. Ogham stones and other 'new age' relics are also popular.

There is some evidence of designer influence in the sector. Rennie Mackintosh's collection includes art nouveau/Celtic influenced jewellery. Newbridge Cutlery's new table accessory range is strongly design orientated, while the Steensons jewellery in Northern Ireland and Alessi's Italian home accessories are popular contemporary giftware ranges.

The leading Irish player in the sector is Solvar who operate their own retail shop. Others include Newbridge, Reaction, Tara, TJH and J&Z Blackman. Newbridge have introduced a contemporary watch range which is reported to be performing well in key giftware outlets.

Fashion retailers such as Principles, Next, Marks & Spencer and Oasis have also become involved in the fashion jewellery sector, although their offers are more commercial and standardised.

Knitwear/Textiles

This segment covers traditional knits (Arans), overcoats, shawls, hats, coats and fleeces, as well as table linen/kitchen textiles.

Historically the main giftware offer has been Aran sweaters and variations of chunky knitwear both hand and machine knitted.

However, in an attempt to even out seasonality and appeal to the local as well as tourist market, retailers have expanded into overcoats, hats, shawls, throws, fleeces and T-shirts. Contemporary styling has been introduced beside the traditional look.

This sector overlaps with the more general apparel retailers and our market size assessment should be treated cautiously, since it is based on IKEG estimates and selected retail interviews rather than empirical statistics.

Nevertheless, we believe the sector is worth at least IR£64m, representing some 14% of the market, and it has become an important aspect of the retail mix for the more progressive giftware retailer. The knitwear element of the IR£64m is worth around £55m with the balance accounted for by linen, scarves, t-shirts and accessories.

Key Irish brands include Blarney, Fishermen, Ireland's Eye, Carraig Donn and Avoca. Ulster Weavers, Fergusons and Bairds dominate the Irish linen sector, while licensed products from Guinness, Murphy's and others are widely available in t-shirts, caps and rugby shirts.

Successful giftware retailers have avoided the risks associated with high fashion, highly seasonal products in favour of more classic but contemporary ranges.

Candles

Candles have soared in importance over the last 3-5 years and are available in all shapes, sizes and priced for all pockets. The retail market is worth an estimated £22m in 1999.

Traditionally, candles were used in churches, yet now they are extremely important household items, especially for interior design and entertaining. In many homes candles are used to achieve subtle lighting effects. Giftware shops and department stores throughout Ireland enjoy substantial sales from candle products. Holders are manufactured in a wide range of styles in bronze, silver, wood, leather, stone and metal mixes.



InterTradelreland – Trade & Business Development Body is committed to enhancing the economies of the island of Ireland through facilitating cross-border and all-island programmes in partnership with key agencies and the business sector at all levels.



Enterprise Ireland (EI) is the Government organisation with responsibility for supporting the growth of the competitiveness, sales, exports and employment of local industry in the Republic of Ireland.



The Industrial Development Board for Northern Ireland (IDB) is responsible for stimulating growth within companies in Northern Ireland and attracting overseas investment.



LEDU, the Small Business Agency for Northern Ireland, supports local economic development and promotes the establishment and expansion of small local enterprises, primarily in the manufacturing and tradeable services sectors, whose employment is generally less than 50.

InterTradelreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU would like to thank all those buyers, distributors and industry experts who contributed their time and expertise during the course of this study. It was most appreciated.

Report Series

This market profile is accompanied by a number of similar reports giving an all Ireland retail perspective on a range of consumer product areas.

The sectors covered are

- 1 Domestic Furniture
- 2 Contract Office Furniture
- 3 Hotel Furniture
- 4 Contract Fitted Furniture
- 5 Housewares and Soft Furnishings
- 6 Giftware and Jewellery
- 7 Clothing and Footwear
- 8 Small Kitchen Appliances (2001 Release)

An additional document giving an all Ireland analysis of retail trends entitled "Ireland, A £20 billion+ Retail Market" is also part of the series.

Note

This report was researched for InterTradelreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU by PricewaterhouseCoopers, Belfast. While every effort has been made to ensure the accuracy of information provided in this report, neither PricewaterhouseCoopers nor InterTradelreland, EI/IDB/LEDU can accept responsibility for possible errors or omissions.

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