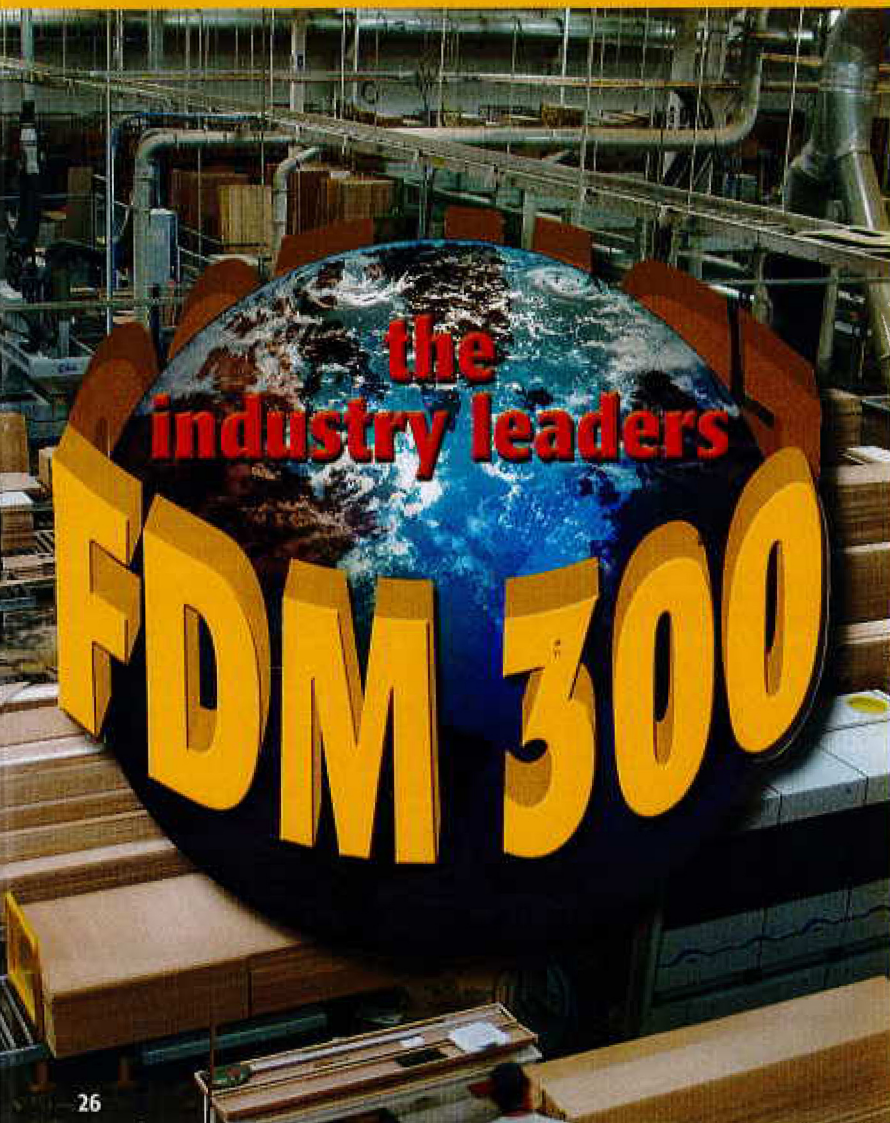


CabinetMaker **FDM**

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Best practices in management, production, materials and design



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Most FDM 300 companies survive toughest year

Sales for the FDM 300 companies crashed in 2009. But here's the important news: Nearly all of the companies in this group survived the year.

And if you survived this year, you can probably survive anything.

We estimate that sales for this group of 300 companies reached \$41.12 billion in 2009, a 19 percent decrease from the 2008 figure of \$50.71 billion.

Employment fell 15 percent, according to our estimate, from 337,861 in 2008 to 285,442 in 2009.

The 2008 sales figure represented a decline of 10.7 percent from the 2007 figure, which was \$56.78 billion. The 2007 number was down 2 percent from 2006, when sales reached \$57.96.

Companies are much less likely to share sales data with us if it has been a down year. And it was a down year for just about everyone. Likewise, employee numbers are often down, but companies aren't broadcasting these lower numbers.

In cabinets, KCMA's year-to-date shipments through November were down about 29 percent. Residential furniture shipments were estimated to be down about 18 percent, according to Smith Leonard. BIFMA shipment numbers for the office/contract segment were down more steeply than had been originally expected — about 30 percent for 2009.

We were able to determine that a few companies did close, some of which are included on this year's list (remember, this is a view of the industry in the year 2009).

Owens Inc. shut down both Sha-



wano, Wis., plants in early December. Peoploungers closed its Mantachie, Miss., plant in June and is not in operation. Penloyd was reported closing in January 2009. New Generations Furniture was reportedly closed in May. We had no contact with Mielach Woodwork, but equipment auctions have been held in December and January. Cabinetec reportedly has closed down its Utah cabinet factory in October. This company was closely tied to the boom-and-bust Las Vegas market.

Other notes: Orleans Furniture closed its Columbia, Miss., plant and will continue as an importer. Coffman is now part of P&F Industries. Shermag is in the process of being part of BDM+ group, which includes Bermex, and Dinex. And Barcalounger has closed its Rocky Mount, N.C. plant and has a shared services agreement with American of Martinsville.

Top 10 financial results

Here's a quick look at the top 10 companies:

- ▶ Steelcase Inc. This is the fiscal 2009 figure.
 - ▶ Ashley Furniture Industries Inc. This is a rough estimate. We did not get a new number for 2009. Last year, about 40 percent of products were imported. We don't break out sales of company-owned furniture stores.
 - ▶ Masco Corp.'s figure is based on third quarter sales of the cabinet segment, including Merillat and KraftMaid.
 - ▶ Herman Miller. This is the number provided by the company for its fiscal year 2008.
 - ▶ Andersen Corp. These are rough estimates of annual sales and employees. There have been published reports of some layoffs and cutbacks in some outlying plants, but not at the main Bayport, Minn., operation.
 - ▶ Haworth Inc. Our estimate. Fiscal year doesn't end until April.
 - ▶ HNI Corp. Figure is based on third quarter results, for office furniture segment only.
 - ▶ Furniture Brands International. The sales number is based on third quarter data.
 - ▶ La-Z-Boy Inc. Information based on 2009 annual report. Total of 73 percent of casegoods are imported. Includes retail sales (13 percent).
 - ▶ Masterbrand Cabinets. Our estimate based on company information.
- Will 2010 be a great year? Maybe not. Will it be better than 2009? You don't have to be Nostradamus to figure that out. You can walk away from a crash landing.



+ FDM 300

Rank	Company name	Main location	Annual sales	Total employees	Web site
182	Furniture by Thurston Inc.	Grass Valley, CA	\$28 mil.* ('09)	108	www.furniturebythurston.com
183	Nucraft Furniture Co.	Comstock Park, MI	\$28 mil. ('09)	190	www.nucraft.com
184	Stylus Made-To-Order Sofas	Burnaby, BC	\$27.5 mil. ('09)	187	www.stylussofas.com
185	Grandview Products Co. Inc.	Parsons, KS	\$27 mil.* ('09)	136	grandviewcabinets.com
186	Flanders Industries Inc.	Menominee, MI	\$26.54 mil. ('09)	350	www.loydflanders.com
187	Adden Furniture Inc.	Lowell, MA	\$26.1 mil. ('08)	153	addenfurniture.com
188	Spectrum Industries Inc.	Chippewa Falls, WI	\$26 mil. ('09)	200	www.spectrumfurniture.com
189	Custom Cupboards	Wichita, KS	\$25.6 mil. ('09)	191	www.customcupboards.com
190	Goebel Fixture Co.	Hutchinson, MN	\$25.4 mil. ('09)	110	www.gf.com
191	Amstore Corp.	Grand Rapids, MI	\$25 mil.* ('09)	200	www.amstore.com
192	Barcalounger Corp.	Martinsville, VA	\$25 mil.* ('09)	125	www.barcalounger.com
193	Decor-Rest Furniture	Woodbridge, ON	\$25 mil.* ('09)	250	www.decor-rest.com
194	DeWils Industries	Vancouver, WA	\$25 mil.* ('09)	125	dewils.com
195	Distinctive Designs Furniture Inc.	Toronto, Ontario	\$25 mil.* ('08)	380	www.ddfi.com
196	Durham Furniture Inc.	Durham, ON	\$25 mil.* ('09)	200	www.durhamfurniture.com
197	Eurodesign Cabinets	Chino, CA	\$25 mil.* ('09)	200	www.eurodesigncabinets.com
198	High Point Furniture Industries	High Point, NC	\$25 mil. ('09)	165	www.hptfi.com
199	Jofco Inc.	Jasper, IN	\$25 mil. ('09)	250	www.jofco.com
200	Lanz Cabinet Shop	Eugene, OR	\$25 mil.* ('09)	200	www.lanzcabinets.com
201	Mastertal Industries Inc.	Rice Lake, WI	\$25 mil. ('09)	200	www.mastertalindustries.com
202	McConnell Cabinets Inc.	City of Industry, CA	\$25 mil.* ('09)	170	www.mcconnellcabinets.com
203	Merritt Woodwork	Mentor, Ohio	\$25 mil. ('09)	110	www.merrittwoodwork.com
204	Nordic Interior Inc.	Maspeth, NY	\$25 mil. ('09)	104	
205	Orleans Furniture Inc.	Columbia, MS	\$25 mil.* ('09)	115	orleansfurniture.com
206	Perdue Woodworks	Rapid City, SD	\$25 mil.* ('09)	100	www.perduesinc.com
207	PIN	Irving, TX	\$25 mil.* ('08)	120	www.pinsolutions.net
208	Royal Seating/IFS	Cameron, TX	\$25 mil.* ('09)	300	www.royalseating.com
209	T.J. Hale Co.	Menomonee Falls, WI	\$25 mil. ('09)	150	www.tjhale.com
210	Tru-Wood Cabinets Inc.	Ashland, AL	\$25 mil.* ('09)	216	www.truwood.com
211	Tuohy Furniture	Chatfield, MN	\$25 mil.* ('09)	230	www.tuohyfurniture.com
212	Pinehurst Woodworking Co.	Mississauga, Ontario	\$24.5 mil. ('09)	160	www.pinehurstinc.com
213	Showbest Fixture Corp.	Richmond, VA	\$24.5 mil. ('08)	180	www.showbest.com
214	David Edward Co.	Baltimore, MD	\$24.2 mil. ('09)	250	www.davedward.com
215	Dubois Wood Products Inc.	Huntingburg, IN	\$24 mil. ('09)	175	www.duboiswood.com
216	Evans Cabinet Co.	Dublin, GA	\$24 mil. ('09)	325	www.evanscabinet.com
217	Vaughan Furniture Co.	Galax, VA	\$24 mil. ('09)	35	www.vaughanfurniture.com
218	Candlelight Cabinetry	Lockport, NY	\$23 mil. ('08)	330	www.candlelightcab.com
219	Carson's Inc.	Archdale, NC	\$23 mil. ('09)	160	www.carsonsofhp.com
220	Davis Furniture Industries	High Point, NC	\$23 mil. ('08)	175	www.davisfurniture.com
221	Downsview Woodworking Ltd.	Mississauga, ON	\$23 mil. ('08)	300	www.downsviewkitchens.com
222	Euro-Rite Cabinets Ltd.	Port Coquitlam, BC	\$23 mil. ('09)	168	www.euro-rite.com
223	Milford Enterprises Inc.	Quakertown, PA	\$22.5 mil. ('06)	115	www.milfordenterprisesinc.com
224	Plato Woodwork Inc.	Payto, MN	\$22.1 mil. ('05)	148	www.platowoodwork.com
225	Harden Furniture Inc.	McConnellsville, NY	\$22 mil. ('09)	325	www.harden.com
226	Signature Custom Cabinetry Inc.	Ehrata, PA	\$22 mil. ('08)	160	www.signaturecab.com
227	Mid Canada Millwork Ltd.	Steinbach, MB	\$21.7 mil. ('08)	150	midcanadamillwork.com
228	Quality Custom Cabinetry Inc.	New Holland, PA	\$21 mil.* ('09)	315	www.qcc.com
229	Bishop Fixture & Millwork Inc.	Balsam Lake, WI	\$20 mil.* ('09)	200	www.bishopfixtures.com
230	Cabcor Inc.	Deauville, QC	\$20 mil. ('09)	180	mobeccollection.com, denla.com, cuisineideale.com
231	Classic Leather	Hickory, NC	\$20 mil. ('09)	232	
232	Dar/Ran Furniture Industries	High Point, NC	\$20 mil.* ('09)	220	www.darran.com
233	Great Lake Woods Inc.	Holland, MI	\$20 mil.* ('09)	175	www.greatlakewoods.com
234	Hoffco Inc.	Wood Lake, MN	\$20 mil.* ('09)	110	www.hoffcoinc.com, www.hoffcobiz.com, www.vacdoors.com
235	Imperial Woodworking Co.	Palatine, IL	\$20 mil. ('09)	250	www.imperialwoodworking.com
236	Kabinart	Nashville, TN	\$20 mil.* ('09)	140	
237	Lazar Industries LLC	Los Angeles, CA	\$20 mil.* ('09)	250	www.lazarind.com
238	Leathercraft Seating	Conover, NC	\$20 mil.* ('09)	203	www.leathercraft-furniture.com
239	Regal Kitchens Inc.	Miami, FL	\$20 mil. ('08)	150	www.regalkitchensinc.com
240	Royal Cabinets	Pomona, CA	\$20 mil. ('09)	325	www.royalcabinets.com