

Exporting metal parts for furniture to Europe

The global furniture market is growing every year. European imports of metal parts for furniture from developing countries show positive developments. As an exporter, you should be innovative and flexible so as to meet quickly changing consumer demands. Chinese suppliers are very competitive in this market, so that you only stand a chance by offering highly customised products.

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1. Product description

Metal parts for furniture are used to complete furniture. You can think of legs for chairs or tables. When this document refers to 'metal parts for furniture', this concerns the selection of products with the following [Harmonised System](#) codes, unless stated otherwise:

- 94039010 – Metal parts for furniture
- 83013000 – Locks used for furniture
- 83024200 – Base metal mountings, fittings and similar articles suitable for furniture

Product specification

Metal parts for furniture have to comply with the quantity and quality demanded by the buyers. They also have to meet the standards and requirements of each buyer. Other product specifications are described below.

Material and design

Most furniture is a combination of wood, plastic and/or metal. About 12% of the total furniture production in the European Union consists of furniture with metal as its primary material. The main benefit of metal parts is the fact that metal offers strength and durability, and in some cases also a trendy outlook (stainless steel or aluminium).

Furniture can be made of different type of metals, but the most commonly used metals are steel (either or not stainless) and aluminium. Each of these metals has its own application in furniture.

Stainless steel is used in modern interior furniture. Hinges, slides, supports and structural parts can be made of stainless steel. Because of its high tensile strength, it can be used in hollow tubes to offer weight reduction.

Aluminium has some unique characteristics that make it a popular material for furniture design. It is light and resistant to corrosion. As a result, it is often used as a material for stamped and cast/moulded furniture parts.

Probably the largest use for aluminium is in outdoor garden chairs. Aluminium atoms form an outer layer of aluminium oxide, which functions as a protective coating. As a result, it protects the internal aluminium from corrosion.

The metal parts may have a surface finish such as a powder coating. Surface finishing is mostly applied to visible metal parts for furniture, such as door handles, for design purposes. Fittings normally do not require surface finishing, as the practical design is more important than the appearance.

The exact requirements for metal parts for furniture are specified by the individual buyer.

Labelling and packaging

Depending on product characteristics and buyer preferences, metal parts for furniture are packed in plastic, carton and/or in containers. In the case of ocean transportation, the packaging must be corrosion resistant. Usually, wooden pallets are packed, wrapped with plastic sheeting and finally packed with strips.

In most cases, the packaging and labelling requirements are precisely described and included in the buyer's specifications. As a final measure, the packaging must always be marked. This is to ensure that it can be identified during transport and to indicate the quantity, the weight, the actual products and the producer's name.

2. Which European markets offer opportunities for exporters of metal parts for furniture?

Imports

European imports of metal parts for furniture increased by 5% per year between 2011 and 2015 to €4.3 billion in 2015.

Metal parts for furniture were mostly imported from countries within Europe. The share of imports accounted for by developing countries grew relatively rapidly from 20% in 2011 to 23% in 2015, while the import share of the 'Rest of the world' remained stable and intra-European imports decreased by 3%.

Leading importers

Overall, Germany is the largest European importer of metal parts for furniture, followed by Poland and the United Kingdom.

When it comes to import from developing countries, Germany is the largest importer (€232 million), followed by the United Kingdom (€117 million) and Poland (€89 million).

Between 2011 and 2015, Germany showed the largest absolute growth (€56 million) in imports from developing countries. Other countries with high absolute growth were Poland (€44 million) and the United Kingdom (€43 million).

In the coming years, the increase in the import of metal parts for furniture is expected to continue, based on the ongoing trend of growing trade (also refer to Figure 1 above). The growth is estimated at 2 to 6% per year, depending on economic developments in Europe.

The major share of the demand for metal parts for furniture will continue to be met by local production. However, the import from low-cost countries, including many developing countries, is forecast to show an increase above average. Still, you have to bear in mind that competition is fierce between developing countries, dominated by China with 83%.

Leading suppliers

China, Germany and Austria are the leading suppliers of metal parts for furniture. In 2015, 55% of the European import of metal parts for furniture was produced in one of these countries.

Other leading suppliers are:

- Italy
- Poland
- the Czech Republic

Import from developing countries is dominated by China (€832 million out of the total of €1.0 billion comes from China). Other important suppliers in the category of developing countries are:

- Turkey (€61 million in 2015)
- Thailand (€39 million)
- India (€21 million)
- Vietnam (€18 million)

The average annual growth of import from China is 8% (2011-2015). Other countries that showed a high annual growth over four years' time are the Czech Republic and Slovakia (both 10%).

China and Poland are particularly strong at supplying the low-end furniture segment. Producers in European countries other than Poland mainly supply the high-end segment, while both supply the middle segment. This middle segment offers good opportunities for suppliers from developing countries which are able to produce higher-quality metal parts for furniture than China, for instance.

Tips:

Germany, Poland, the United Kingdom, France and Italy are the most interesting focus markets for suppliers from developing countries.

Benchmark your company against your peers from China and other supplying countries.

Europe also imports complete furniture from several developing countries, especially China and Turkey.

You can get information about the latest trends and developments in the furniture industry from international magazines and news sources. A few examples are [Furniture & Joinery Production](#), [Worldfurnitureonline](#) and [Furniture & Accessories Europe](#). [International Alliance of Furnishing Publications](#) may also be interesting for you, as many furniture magazines from different countries are members of IAFP.

You can use trade fair databases like [Eventseye](#) or [Auma](#) to find relevant trade fairs in Europe. To get a better understanding of the furniture industry, you should consider visiting the leading furniture events in Europe. These are: [Ambiente](#), [Sogafa](#), and [Tendence](#) in Germany and [Maison-Objet](#) in France.

Exports

Total European exports of metal parts for furniture increased by 4% per year between 2011 and 2015 to almost €4.9 billion. Exports of European metal parts for furniture were mainly destined for other European countries.

In 2015, exports to developing countries amounted to €446 million. The share of developing countries in European exports showed a downward trend in the period under review, falling to 9% of all European export in 2015.

Germany is the largest European exporter of metal parts for furniture (€1.4 billion in 2015). Germany also has the largest share of all European exports (29%), followed by Austria (23%) and Italy (12%). Other important exporters are Poland (6%), the Czech Republic (5%) and Slovakia (3%).

Of these countries, Austria showed the highest absolute growth in export to developing countries (€22 million in four years' time). Other countries with a high absolute growth were Germany (€11 million, +0.8%) and Italy (€8 million).

Production

In 2011, the production of metal parts for furniture reached its peak at €5.6 billion. Between 2012 and 2013 production decreased to a value of €4.7 billion. However, the production of metal parts for furniture recovered in the year afterwards, reaching €5.1 billion in 2015.

Germany is the largest producer of metal parts for furniture in Europe (30% share), followed by Austria (21%) and Italy (16%). Other important producers are Spain, Poland and the Czech Republic. The most striking development is the decreasing share of Italian production (from 30% to 16% in four years' time).

Tips:

Reliability is of utmost importance to European companies. Focus, for instance, on quality and delivery time.

Supplying parts to producers in the European low-end segment offers opportunities, although your chances in the middle segment may be better.

You could improve your chances by being able to work with high-end materials such as stainless steel. This improves your opportunities outside the low-end segment.

You can use [EU Export Helpdesk](#), [ITC Market Access Map](#) and [ITC Standards Map](#) for more information related to gaining access to the European market.

Check European and national associations for the furniture sector, such as [European Furniture Industries Confederation](#), [European Furniture Manufacturers Federation](#) (Europe), [Hauptverband der Holz und Kunststoffe verarbeitenden Industrie](#), [Verband der Deutschen Moobelindustrie](#) (Germany) and [British Furniture Manufacturers](#) (United Kingdom). Use [Google Translate](#) to convert these websites to your own language.

Demand

European demand for metal parts for furniture reached a peak of €5.0 billion in 2011, but dropped in 2012 and 2013 to €4.1 billion in 2013. The demand for metal parts for furniture increased in the years afterwards, reaching €4.6 billion in 2015.

Germany, Italy and the United Kingdom are the largest markets for metal parts for furniture. Together, they represent 46% of the total European market. Other countries with high demand are:

- Poland (9% share)
- Spain (8%)
- France (8%)

The high demand for metal parts for furniture is related to the size of the furniture production industry in these countries.

3. What trends offer opportunities on the European market for metal parts for furniture?

Globalisation in the furniture supply chain continues

International competition within the furniture industry is increasing. Furniture sold in Europe is increasingly coming from foreign (developing) countries such as China, Vietnam and Turkey.

For instance, 70% of the furniture sold in the Netherlands is imported. The imported furniture is mainly destined for the low segment, while the remaining 30% (local production) is mainly destined for the middle and higher segment. Due to the large and relatively low-cost labour force, the availability of raw materials and the capability toward mass production, low-cost countries play an increasingly important role in the furniture industry.

This development makes the furniture industry very dynamic and can offer opportunities and threats to exporters from developing countries at the same time.

Importance of sustainability in furniture industry

The furniture industry is also influenced by the growing importance of sustainability and corporate social responsibility, particularly in the high-end segment. More environmentally friendly furniture is now being produced, made of materials such as certified sustainable wood, bamboo, and recycled metal and plastic.

Beside the usage of sustainable materials, the furniture parts should also offer benefits in terms of energy and water consumption and emissions during their life cycle. Last but not least, they should also be easy to recycle and disassemble.

Shorter product life cycles need flexible production concepts

The furniture industry is characterised by the shortening of the product life cycle due to changing customer needs. An example is the popularity of stainless steel products, such as stainless steel frames for furniture and black stainless steel kitchen furniture and appliances. This trend is mostly visible in the low and middle segment, but it also influences the high-end segment.

In addition, customisation in furniture production is increasing as well. Flexibility, innovation and efficiency are important components in product development in order to fulfil the changing customer demand. This also explains why European customers prefer metal parts supplied by local manufacturers.

Growing efficiency in production of furniture and metal parts for furniture

Furniture and metal parts for furniture are mainly produced by robotic automation. Automation allows production to be more accurate, faster and safer for workers.

Some manufacturers of small furniture and metal parts for furniture, such as [Ahrend](#) and [Drentea](#), even offer 24 hours' production services. Next to automation, lean thinking is also becoming more important. As a result, costs are saved and less waste is produced.

Tips:

For information on general trends, refer to our study [Trends for Metal Parts and Components](#).

4. What requirements should metal parts for furniture comply with in order to be allowed on the European market?

Requirements can be divided into: (1) legal requirements you must meet in order to enter the market and (2) non-legal requirements which most competitors have implemented, and which should be met in order to keep up with the market.

See our study [EU buyer requirements for metal parts](#) for a general overview of requirements; the requirements that apply specifically to parts for furniture are given below.

Legal requirements

No specific legal requirements apply to metal parts in general. This also means that there are no specific legal requirements for metal parts which are exported to Europe for application in furniture.

Packaging and liability

Note that there is no product-specific legislation on [packaging](#) and [liability](#) which applies to all goods marketed in the European Union.

Import duties

On metal parts for furniture a 2.7% duty is levied on European imports from countries outside Europe, which includes China. Several countries benefit from a preferential 0% tariff, for example Turkey and South Africa.

The TARIC database shows more details for Chapters [8301](#), [8302](#) and [9403](#). Note that it is only possible to claim a preferential tariff treatment with a Certificate of Origin.

Tips:

Make sure that your wood packaging material is approved for the European market. If you are unsure, ask your wood packaging material supplier for clarification. Your wood packaging material supplier should take any further action required in order to comply with the Directive. If the supplier is not able to do so, it may be possible to switch to another supplier.

Exporters from a country with a preferential 0% tariff (under the Generalised System of Preferences, or GSP) have a small to competitive advantage versus competitors from countries without such a preferential tariff.

Non-legal requirements

If you are already a reliable supplier to other furniture producers (not only within but also outside of Europe), you should use these references to inform potential buyers. This helps to show them your capabilities in the furniture industry.

Public standards

[ISO TC136](#) contains a list of ISO standards applicable to several furniture items and characteristics. Many of these deal with size and dimension of furniture items. Your European buyer will be aware of relevant ISO standards and, if relevant, his specification of parts will also be based on these ISO standards.

Buyer's specifications

The most important buyer requirements relate to the parts themselves. Materials, dimensions and finishing must meet the buyer's specifications. This includes not only the metal but also the coating used for finishing. Once the buyer has accepted the samples and all other conditions have been agreed upon, the contract can be signed. From that point, the main challenge for the suppliers is to deliver the products according to the agreed-upon specifications, delivery times and volumes.

Tips:

If you are a parts producer with strong references in the furniture industry, you should ensure that prospects can easily find, recognise and evaluate your reference list.

You should not underestimate the importance of buyer satisfaction, especially in situations in which you are supplying directly to furniture producers. Although buyers obviously consider a good quality of the products important, they also attach a great deal of value to compliance with delivery times and delivery volumes.

In practice, the producer will strictly manage the quality of the metal parts for furniture used. He will ask you for test reports for certain parts, following certain ISO TC136 standards.

See our [10 tips for doing business with European buyers of metal and plastic parts and components](#) and our [10 tips for finding buyers in the metal parts and components sector](#). The above tips also offer more information on which topics are decisive for European buyers when searching for (new) suppliers.

5. Through which channels can you find metal parts for furniture on the European market?

Manufacturers of metal parts for furniture from developing countries should focus on supplying large European furniture manufacturers directly. Another option would be to supply European producers of metal parts for furniture. A final option would be to supply importers/distributors who supply small- and medium-sized furniture producers.

A few examples of furniture producers in Europe are the following (between brackets the segment which they supply, either the low-, mid- or high-end segment):

- [Met-lak](#) (medium), [Met-Pol](#) (medium), [Tapex](#) (medium-high), [BIM Meble](#) (high) (Poland)
- [Hulsta](#) (high), [Dreipunkt](#) (high) (Germany)
- [Wittmann](#) (high), [Joka](#) (high) (Austria)
- [Boerboom](#) (medium-high) [Gispen](#) (high), [Pastoe](#) (high) (the Netherlands)

Examples of producers of metal parts for furniture in Europe are:

- [Teyfmon](#) (medium-high), [Mecalde](#) (high) (Spain)
- [Famit](#) (high), [Emuca](#) (medium) (Italy)
- [Consiglio International](#) (medium-high) (Poland)
- [Wachtendorf & Schmidt](#) (medium-high), [Rampa](#) (high), [Hettich](#) (high), [Hafele](#) (high) (Germany)
- [Parametal](#) (medium-high), [Titus](#) (high) (Slovenia)
- [Bedslats](#) (medium-high), [Jetpress](#) (medium-high), [Components direct](#) (medium-high) (United Kingdom)
- [Onkenhout](#) (high), [Orfa Visser](#) (high) (Netherlands)

Examples of competitors from China and Turkey in the European market are:

- [ShenZhen Promostar](#) (medium), [Nanpi Xinchengweiye Hardware Products](#) (low-medium), [Vic Metal](#) (medium), [Ningbo Xianglong Metal Products](#) (medium), [Dongguan Pinyee Metal&Plastic Products](#) (low-medium) (China)
- [Cetin Plastik](#) (medium) (Turkey)

The margins in the value chain depend on processing costs and the value added in each part of the chain. The following applies to the mid- and high-end segments:

- Suppliers of metal parts for furniture work with a margin of 2 to 8%
- Importers/distributors need a 12 to 25% margin to cover all costs


Margins depend greatly on volume, as relatively large volumes normally need lower margins to cover all costs.


Tips:


See also our study [Channels and Segments in the Subcontracting, Metal Parts, and Components industry](#).

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