

# The European market potential for bed textiles

The European market for bed textiles is large and stable. Imports are steadily increasing with an average annual growth of 1.9%. With a 62% import share, developing countries are Europe's main source of bed textiles. This makes Europe an interesting market for you. A continued growing interest in natural materials and designs, as well as sustainability, offer you opportunities. The story behind your products can add further value to your products.

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## 1. Product description

Within the Home Decoration and Home Textiles (HDHT) sector, bed textiles are categorised under the 'home textiles' category. The bed textiles product group typically consists of bedspreads and duvet covers.

A bedspread is a piece of fabric designed to cover the bed, from top to bottom and from side to side. Although bedspreads can be used for warmth, they are primarily used as decorative articles for the bed.

A duvet cover is a large fabric bag that protects the duvet. A duvet is a type of bedding consisting of a soft bag filled with feathers, wool or a synthetic alternative. Duvet covers have button, envelope/flap, snap, tie or zipper closures at the bottom, allowing the cover to be easily removed and washed. Duvet covers almost always come with matching pillowcases.

This study uses the following harmonised system (HS) codes to indicate trade in bed textiles:

Table 1: Product codes

Harmonised System (HS)	Description
6304 11	bedspreads - knitted or crocheted
6304 19	bedspreads - other
6302 2100	bed linen, printed, of cotton
6302 2900	bed linen, printed, of other textile materials
6302 3100	other bed linen of cotton
6302 3900	other bed linen, of other textile materials
6302 22	other bed linen, printed, of man-made fibres
6302 32	other bed linen, of man-made fibres

Prodcom	
1392 1640	Bedspreads (excluding eiderdowns)
1392 1253	Bed linen of cotton (excluding knitted or crocheted)
1392 1255	Bed linen of flax or ramie (excluding knitted or crocheted)
1392 1259	Bed linen of woven textiles (excluding of cotton, of flax or ramie)

## Bedspreads

Bedspreads mainly serve as decorative articles for the bed but can also be used as blankets to provide warmth to the user. They provide an easy way to change the decoration of the bedroom, where the bed is the main focus.

Bedspreads are available in a variety of fabrics, such as cotton, linen and wool. Blended yarns and mixed fabrics are also common. Very high-end bedspreads can be made of luxurious fibres like silk and cashmere. Bedspreads come in a wide variety of designs, styles and patterns. They can be colourful or plain and match every personal taste.

Sizes vary depending on bed dimensions. The most common sizes for bedspreads in Europe are:

- 140 x 200 cm
- 180 x 220 cm
- 200 x 280 cm
- 240 x 280 cm
- 210 x 270 cm
- 260 x 290 cm

Other sizes are also available, depending on the target country. Ask your European buyer which specific sizes they are looking for in the early stages of the collaboration.

## Duvet covers

Since actual duvets cannot be cleaned too often due to their delicate filling, duvet covers are used to protect them from dust and stains. Duvet covers also fulfil a decorative purpose. Being essentially bed covers, they can change the look and atmosphere of a bedroom in a simple and inexpensive way.

Duvet covers are available in a wide variety of fabrics as well. However, since they need to be washed regularly the most commonly used material is cotton, as it combines breathability and durability. Cotton can also be blended with other (manmade) fibres to make ironing easier. Other raw materials include linen, silk and polyester, although they are not as common.

Duvet covers come in a variety of designs, along with matching sheets, pillowcases/pillow shams and bed skirts. The different styles include floral patterns, natural looks, geometric shapes, fantasy images, tropical and animal prints, photo prints, as well as solid colours. Handmade duvet covers usually have patchwork designs and (traditional) embroideries.

Sizes also vary depending on bed dimensions. The most common sizes for duvet covers in Europe are:

- 150 x 210 cm (single bed)
- 200 x 200 cm (double bed)
- 240 x 220 cm (king size bed)
- 260 x 220 cm (super king size bed)

Other sizes are also possible, depending on the target country. Ask your European buyer which specific sizes they are looking for in the early stages of the collaboration. It is not common to have joints in the front or back of a duvet cover, so for example, a minimum fabric width of 220+ cm for double bed duvet covers is advisable. This has consequences for the kind of looms you (or your fabric supplier) have to use.

## 2. What makes Europe an interesting market for bed textiles?

The recent [outbreak of the coronavirus](#) and the measures taken against it worldwide are already having a large impact on international trade and the European market for many products and services, including HDHT. Please note that the below analysis is based on the statistics that are currently available (2015–2019). Therefore, the expected impact of the coronavirus on the European market and global supply chains have not been taken into account in this report. For the latest news in your sector, please check [CBI News](#).

Between 2015 and 2019, European imports of bed textiles increased from €3.8 billion to €4.1 billion, with an average annual growth of 1.9%. Based on these figures, the European market for bed textiles is large and stable. The yearly growth of the world imports of bed textiles showed an average increase of 2% between 2015 and 2019, reaching €9.9 billion. This means European imports account for 41% of the total worldwide bed textile imports.

Developing countries are Europe's main source of bed textiles. They supply around 62% of European imports. Between 2015 and 2019 imports from developing countries have been quite stable, showing a slight growth from €2.4 billion in 2015 to almost €2.6 billion in 2019. This makes Europe an interesting market for you, as an exporter from a developing country.

In the medium term it is uncertain how the European market for bed textiles will develop, as the recent coronavirus outbreak may cause some disruption and is expected to affect the demand for HDHT products, including bed textiles. For more information on the short and long-term impact of the coronavirus on the sector, please read our study on '[How to respond to COVID-19 in the Home Decoration and Home Textiles sector](#)'.

When economic circumstances and prospects are dim, consumers postpone buying non-essential items. This means new home textile purchases, including bed textiles may be limited to replacements for broken or worn out items. On the other hand, the lockdown in many countries has increased the attention people have for their homes, so this growing focus may also have a positive effect. In this stage it is very hard to predict the exact consequences of the coronavirus for people's buying decisions.

In the long term, the increased interest in trends like wellness and sustainability, especially in the higher segments, are still likely to stimulate the demand for bed textiles. For more drivers of demand, see 'which trends offer opportunities?' below.

## 3. Which European countries offer most opportunities for bed textiles?

In 2019, Germany remained the main market for bed textiles in Europe with 22% of imports, followed by the United Kingdom and France, with almost 15% and 14% respectively. Together they accounted for 51% of the total European bed textile imports. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are the Netherlands (7.7%), Italy (5.7%) and Spain (5.3%).

However, you should be aware that in the European market, countries have different roles. You can make a rough distinction between countries that mainly import and countries that are mainly manufacturers. Most Western-European importers do not just sell their products in their own country, but across the European continent. This explains why in HDHT, small countries like Denmark and the Netherlands can import much more than the demand in their own domestic market.

The European producing countries are located for the biggest part in the Eastern part of Europe. This is mostly because of their closeness to European market and the favourable labour cost. This sometimes makes them a good alternative for sourcing from the Far East.

In terms of marketing, it is important to realise that countries are not markets. In HDHT we distinguish different market segments, ranging from the low to the high segment (also see our study on 'Entering the European market for bed textiles'). [\[A1\]](#) Every country in Europe has these segments, sometimes they are just larger or smaller in size in a particular country. Therefore, it makes much more sense for you to identify a particular segment in your product group and connect to the importers and distributors in that segment. These distributors will then sell right across Europe, in that same segment. Rather than you doing 'country marketing', your importers will do that more effectively.

## **Real private consumption expenditure**

An important indicator for growth in demand is real private consumption expenditure. The HDHT sector, which includes the bed textiles market, is sensitive to economic cycles. When economic circumstances and prospects are negative, consumers postpone buying non-essential items. The other way around, when economic conditions are favourable, private consumption expenditure and purchases of home textiles surge.

In recent years the leading European markets showed an annual growth in real private consumption expenditure of around 1-3%. Forecasts for the coming year continued this positive trend, until the recent outbreak of the coronavirus. Now, predictions are uncertain. Because the HDHT market responds to economic cycles, demand is expected to reflect any potential economic fluctuations.

## **Germany is the largest European importer**

Germany is Europe's leading importer of bed textiles as well as the largest economy in Europe. It is home to 19% of the European Union's population. The German economy is widely considered the stabilising force within the European Union, historically showing a higher growth rate than other member states.

With €911 million worth of imports in 2019, Germany is responsible for 22% of the total European demand for bed textiles. German imports have been fairly stable in the last 5 years, with an average yearly growth between 2015 and 2019 of 0.1%. Only 2016 showed a decrease of 3.9%.

Some 65% of the German import value in 2019 was sourced from developing countries, mainly Pakistan and Bangladesh. Between 2015 and 2019 the average annual growth of imports from developing countries was slightly negative, caused by normal market fluctuations.

Although Germany is the largest market for bed textiles in Europe, it does not show significant growth in imports from developing countries. Given this trend, it is not expected that imports will increase in the next few years. In addition, the current outbreak of the coronavirus in Europe will probably affect short term demand, so imports are not likely to show growth in the next year.

## **The United Kingdom sources almost all of its bed textiles from developing countries**

With a share of almost 15% of the European bed textile imports, the United Kingdom is the second largest importer in Europe. Between 2015 and 2019 its imports were relatively stable around €615 million, except for a dip in 2018 at €567 million. In 2019, the market rebounded to €614 million.

The United Kingdom has the highest share of bed textile imports from developing countries, with an impressive 87% of its total import value. Overall, imports from developing countries, which include Pakistan, Bangladesh and Egypt, fluctuated around €540 million between 2015 and 2019. Again, with the exception of a dip in 2018 (€484 million).

[The United Kingdom's withdrawal from the European Union](#) may have a major impact on consumer confidence. The uncertainties related to Brexit, the recent coronavirus outbreak and the resulting economic slowdown are expected to affect the consumption of HDHT products, including bed textiles. As such, your prospects for the next few years are modest at best. At the same time, to prepare for Brexit and deal with the devaluation of the pound, some British buyers that used to purchase from Europe have started importing directly from Asia.

## **French imports have stabilised**

The French market is similar in size to that of the United Kingdom. With a total import value of €563 million in 2019, France has a share of almost 14%. French imports fluctuated in 2016 (-3.7%) and 2017 (+7.3%) but have been relatively stable since then. The average yearly growth between 2015 and 2019 was 0.6%.

Although developing countries have higher shares in the other leading importing markets for bed textiles, France imports a considerable amount of bed textiles from developing countries (44%). The main countries are Pakistan, Bangladesh and Tunisia. The country offers particularly good opportunities for suppliers that share its language.

## **The Netherlands is an important European trade hub**

Between 2015 and 2019, the Netherlands showed an average annual growth of 4.4% in bed textile imports. This is mainly caused by the increase in 2016 and 2017. After these years the numbers declined, reaching an import value of €321 million in 2019. The Netherlands is responsible for 7.7% of the total European demand for bed textiles.

The Netherlands sources most of its bed textiles from developing countries. The top countries are Pakistan, Bangladesh and Cambodia. In 2019, the share from developing countries was 76%. Over the last 5 years, the Netherlands has shown an average annual growth in imports from developing countries of 1.8%. Although imports from European countries are relatively low (24%), this share has increased in the last five years. Intra-European trade showed an average annual growth of 17%, meaning imports from European countries are increasing at a much faster pace than those from developing countries.

In addition to Brexit and the coronavirus outbreak, the international trade disputes between the United States and China and between the United States and Europe may have a big impact on the Netherlands. Because the country heavily depends on international trade, negative developments in that area strongly affect its economic performance. This, in turn, would affect bed textile consumption.

Since the Netherlands is a big re-exporter of goods, the impact on HDHT imports goes beyond the country itself. As such, developments in other European countries will also play a role. Given the economic slowdown in Europe as a whole, an increase in imports is not expected for the coming year.

## **Italy increases its imports from developing countries**

With a value of €236 million in 2019, Italy's share in the European demand for bed textiles is 5.7%. Over the past 5 years, imports of bed textiles have fluctuated, resulting in a slightly negative annual average growth rate of -1.1%.

Interestingly, imports from developing countries increased in the period 2015-2019 at an average annual rate of 5.7%, while imports from European countries decreased significantly (average annual growth of -11%). Between 2015 and 2019, Pakistan was by far the main supplier with a share of almost 40% of the total Italian imports. This upward trend of imports from developing countries shows that there are opportunities for exporters from

these countries. In 2015, Germany was one of the top three suppliers, in 2019 the main suppliers were Pakistan, Turkey and Moldova. It is likely that Italy will increasingly shift to direct sourcing instead of importing from other European countries.

## Spain is shifting more of its import share to developing countries

Spain is the smallest of the top six countries and is responsible for 5.3% of the total European imports of bed textiles. Spanish imports fluctuated between 2015 and 2019, with a peak in 2017 at €248 million. In the last two years there has been a decline, with values decreasing to €220 million in 2019.

Although the total bed textile imports declined, imports from developing countries are high (with a share of 76%) and continue to increase at an average annual rate of 5.6%. However, likely for the same reasons as Italy, Spain imports less and less bed textiles from European countries (-12%).

### Tips:

To find potential German buyers, you can search the German company database [Wer Liefert Was](#). For companies in the United Kingdom, France, The Netherlands, Italy and Spain you can visit the website of [Kompass](#), a global online business directory or [Europages](#), a European company database.

Do not just focus on specific European countries. Instead, identify the appropriate segment and let your buyers distribute your products across Europe within this segment.

## 4. Which trends offer opportunities on the European bed textiles market?

Bed textiles play an important role in some of the major consumer trends that dominate the HDHT sector: Wellness, Sustainability and Millennial Influence. For more information, see our study about [trends for Home Decoration & Home Textiles](#). We will outline each trend below, starting with the potential effects of the recent coronavirus outbreak on the HDHT market.

### The coronavirus and trends in HDHT and bed textiles

It is hard to predict what direction HDHT consumption will take in the short and longer terms. An expected outcome after the coronavirus pandemic is that people will be more focused on the home, having been in lockdown. Furthermore, some of the changes during lockdown may become permanent.

Home decoration generally is not considered essential shopping and many retail outlets in our industry have therefore had to close or decide to close due to a lack of traffic. Consumers lack confidence now that their income and livelihood are under pressure, so they are also careful to spend beyond food, cleaning products, and other household essentials.

However, some areas/product groups could benefit:

- wellness
- working from home
- cooking (everybody is exchanging recipes on social media)

Spending a lot of time at home has also moved consumers towards:

- a re-appreciation of their homes and the desire to make their homes more pleasant, practical and comfortable overall

- bringing the outdoors inside and vice versa
- cleaning out clutter

These short-term trends are partly a continuation of consumer trends that were already ongoing, but some may be accelerated. Particularly the increased interest in wellness and natural themes fit in well with existing trends in the bed textiles market.

In addition, the pandemic has demonstrated the fragile balance on this planet. As such it is another important demonstration of the fact that we need to produce more sustainably, taking care of our resources, our people and the planet in general. This provides more opportunities for those companies that have integrated sustainability as part of their business model.

## Wellness: Natural materials and designs

European consumers are driven by the wish to improve their mental and physical health. Stimulated by Asian lifestyles, they are creating a spa atmosphere in their home. Seeking ways to unwind, wealthy consumers increasingly assign more value to contact with nature and healthy practices, such as sleeping better.

The feeling of wanting to escape to nature, combined with a lack of time in busy city life, inspires designers to merge outdoor imagery with indoor decoration. Relevant product groups related to wellness and the search for well-being include, among others, luxury bed linen. Styles with natural raw materials or natural colours will find favour with consumers. Flowers or leaf patterns, green colours and print combinations that relate to natural habitats are becoming increasingly popular.

The wellness trend is seen mostly in the higher market segments, where people can afford luxury and spa products. However, increasingly the middle class embraces this lifestyle, offering a new segment and opportunities for more affordable concepts.

### Tips:

**Study developments** in wellness, including spa, massage, yoga practices and other forms of physical and mental self-improvement. These give important clues as to consumer preferences for the home environment.

When selling your bed textiles in line with the spa & wellness trend, you are advised to focus on the middle-high market segment, considering organic fabrics and special (customised) designs.

Consider working together with producers of complementary spa and wellness products, in order to create a more coherent collection.

Offer duvet covers and bedspreads with a natural look by using natural colours and patterns that resemble nature. Consider using elegant materials and designs, especially when you target the middle-high and high-end of the market.

## Sustainability: A focus on better business

Following the textile industry trends, the current consumer and designer trends for bed textiles focus increasingly on 'better business'. This is the concept of minimising the environmental impact around production and consumption of goods. They are shifting their preferences towards more sustainable choices.

For bed textiles, there are different raw materials you can use that are more sustainable. Materials like organic cotton, hemp, bamboo, ramie and soy silk are popular for duvet covers. For bedspreads, organic cotton, hemp and bamboo are trendy. However, since sustainable materials come with a higher price, this trend is more



relevant to the higher segments of the market.

Other ways to become greener include sustainable production, biodegradable end products and more effective packing and transport. Certification – such as fair trade or organic ingredients – can also further enhance your product. An example of organic certification is the [Global Organic Textile Standard \(GOTS\)](#). This is the worldwide leading textile processing standard for organic fibres, including ecological and social criteria.

### **Tips:**

Consider sustainable raw materials and sustainability certifications for your duvet covers and bedspreads, especially if you are supplying the higher segments of the market. There are different certifications to ensure sustainable raw materials and sustainable processes.

Invest in greener production, packaging and transport methods.

Clearly communicate the green aspects of your bed textiles to your buyer.

For more information, see our special study on [sustainability](#).

## **Millennial Influence: Create your own niche**

Millennials (born between 1981 and 1996), as the largest global population group with the biggest spending power, are the upcoming new consumer, and soon also the new professional buyer.

Within this group there is a growing demand for authentic products with a story, as opposed to mass-produced items. Capitalising on what makes your products and company unique allows you to add value and position yourself in a part of the market that competes on more than just price. You can do so by emphasising special materials, special techniques and the story behind your product and company.

## **Transparency and content**

A large part of the Millennial group is very concerned with the environment. This is no surprise, since climate change affects both their happiness and prospects. They want the brands they buy from to have a vision and be transparent, to be sure that their purchases are 'right'.

Exporters into the new Millennial markets should therefore have a clear and attractive mission, be true to their word and communicate clearly. One of the Millennials' characteristics is their 24/7 online presence; they grew up using social media. Generally, Millennials are also price-sensitive and not necessarily loyal in their consumer behavior, so brands need to do intensive marketing.

So, it adds to your attractiveness as a supplier when you are able to support your buyers with online content for their marketing and promotion.

## **Personalisation**

The trend of personalisation remains strong in the textile industry. Duvet covers and bedspreads have an important decorative function that can easily shape the style and the atmosphere of a bedroom. Therefore, duvet cover and bedspread designs are very diverse, in order to match the countless tastes and moods of consumers.

To enable the consumer to create further possibilities in personalising their choice you can offer diversification within your own range: Work in 'product-families' that allow mixing and matching of different types of bed textiles. You can for instance add decorative cushion covers or throws to your offer.



An added advantage is that this will also help your buyer to market your products more easily since this approach facilitates the creation of a 'look' or 'mood'.

### Tips:

Consider creating your own niche by taking advantage of those aspects of your bedspreads and duvet covers that are different from other (more mainstream) products in the market.

Consider providing a variety of choices for your target group of consumers, working in 'product-families'.

Consider developing content that can be used by your buyer to market your products and the story behind your products online.

## Smaller quantities and shorter lead times

European buyers change their collections increasingly often. As a result, they are looking for shorter lead times and lower minimum orders. This is a distinct advantage for small to medium sized producers, since they are generally more flexible and able to supply smaller quantities than large manufacturers.

### Tip:


If you are flexible in production and can supply smaller quantities, emphasise this in your promotion.

[The Shop](#) is a company from India focusing on hand crafted textiles using traditional techniques in a contemporary manner. Working with craft communities, they aim to provide an alternative for products made in bulk. They also take the environment into consideration by using solar heating, harvesting rainwater and properly taking care of the effluents that result from production. In the company's marketing and promotion, their ecologically responsible production combined with the use of traditional skills is one of the main focal points.


This study has been carried out on behalf of CBI by [Globally Cool B.V.](#) in collaboration with Remco Kemper.

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