

# The European market potential for occasional furniture

The European occasional furniture market offers good opportunities, as imports are growing. Nearly half of these imports come from developing countries, making Europe an interesting market for you. The demand for occasional furniture is boosted by its flexibility, allowing consumers to easily move pieces around and maximise the use of their space. Sustainable practices and playful design elements can add further value to your products.

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## 1. Product description

In the Home Decoration and Home Textiles (HDHT) sector occasional furniture, also known as small furniture, is categorised under furniture and lighting. The product group occasional furniture typically consists of:

- poufs
- beanbags
- stools
- side tables

Occasional furniture is very popular with consumers and makers (designers and brands) due to the flexibility it offers. The items can easily be moved around for temporary seating or for placing another item on. This allows consumers to adapt both their indoor and outdoor spaces to various uses, such as eating, lounging, socialising and working.

This study uses the following codes to indicate trade in occasional furniture:

Table 1: Product codes for poufs and beanbags\*

Harmonised System (HS)	Prodcom	Description
9404 90	1392 2493	Articles of bedding/furnishing, not elsewhere specified, stuffed or internally fitted
	1392 2499	

\* There are no specific HS or Prodcom codes available for stools, side tables or occasional furniture in general.

## Poufs and beanbags

Poufs and beanbags are examples of informal seating, used for relaxing. A pouf is a large, hard cushion that may have an internal frame to give it more rigidity. A beanbag is a sealed bag containing synthetic pellets (the ‘beans’) that users can shape. While poufs invite a more active posture, beanbags support any comfortable position and can even be used for a short nap.

Poufs can be round or square, with typical dimensions of about 35cm in height and a diameter of 50 to 60cm. They are textile-based (cotton, or combinations of natural materials and polyester) or leather-based (real or

faux). Poufs are cosy, decorative items that blend in well with the rest of the interior, while their use of patterns or techniques is often trendy. They are more a family buy.

Beanbags are expressive, fun and stand out, making them especially suitable for a younger audience. They are usually brightly coloured and come in many shapes, from bag shapes to rounded shapes. The average dimensions are between 70 and 90cm in diameter, but they can measure up to 200x120cm to allow for fully stretched positions. Materials range from natural fibres (such as cotton or leather) to faux leather and synthetic fibres, depending on price and in- or outdoor use.

The fillings of both poufs and beanbags are usually polystyrene beads or polyester, often recycled. Natural fibre fillings are increasingly common.

## Stools and side tables

Stools and side tables add highlights and diversity to the home. Consumers often use them to display accessories or dinnerware. The stool in particular is found all over the house, from the living room or bathroom to the garden or balcony.

Stools can range from around 30 cm to 45-50 cm in height, while side tables can go up to 70 cm. They should not be too low, as Europeans are relatively tall. The tops can have any shape and dimension, but round and square are the most common.

Because stools are for active but short sitting moments rather than for lounging, they do not have to be comfortable. The aesthetic value of stools and side tables is high, especially in the upper market segments. The tops and frames come in metals, wood types, synthetic materials, glass and even ceramics. How special and how solid the materials are can affect the price. For instance, a veneered stool will be less pricy than a solid teak piece.

In the upper market segments, consumers are looking for supreme craftsmanship and design. They choose stools and side tables for their individual character, as an eye-catcher. In the lower segments however, where value for money counts, side tables often come in sets of two or three nesting or stackable elements.

### Tip:

Study the [average dimensions of occasional furniture](#) in your European target countries and communicate with your buyers about their needs.

## 2. What makes Europe an interesting market for occasional furniture?

The recent [outbreak of the coronavirus](#) and the measures taken against it worldwide are expected to have 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](#).

The outbreak is expected to affect demand for HDHT products. The current crisis results in very low consumer confidence, globally. Besides a preoccupation with their health, consumers worry about whether they will have work, and to what extent their livelihood will be under pressure. This obviously does not stimulate the sales in HDHT. Besides, lots of brick and mortar retail in HDHT has closed (being 'non-essential'), and some will not

survive the crisis, financially. So, the distribution chain in the HDHT sector is also severely affected.

(!) Because no specific trade data are available for stools, side tables or occasional furniture in general, these statistics cover stuffed or internally fitted articles of bedding/furnishing.

Between 2015 and 2019, European imports of stuffed or internally fitted articles of bedding/furnishing increased from €2.4 billion to €3.0 billion, with an average annual growth of 5.4%. In comparison, worldwide imports showed an average annual growth of 2.1% between 2015 and 2018, reaching €8.6 billion (values for 2019 are not yet available). This means the European market accounts for more than a third of the total worldwide stuffed or internally fitted articles of bedding/furnishing imports.

Between 2015 and 2019, around 44% of the total European import value was sourced from developing countries. As seen in Figure 1, this translates to a steady increase from €1.0 billion to €1.3 billion. This makes Europe an interesting market for you as an exporter from a developing country.

In the short term it is uncertain how the European market for occasional furniture will develop, as the recent coronavirus outbreak may cause some disruption. 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’](#).

Recent market growth is driven by the ability of occasional furniture to provide consumers with flexibility, as part of the ‘shared living’ trend. This is also expected to remain a driver for the long-term demand for occasional furniture. Moreover, the increasing interest in items that can be used both in the home and in consumers’ outdoor space can also stimulate the occasional furniture market. For more drivers of demand, see ‘which trends offer opportunities?’ below.

### **3. Which European countries offer most opportunities for occasional furniture?**

In 2019, Germany remained Europe’s leading importer of stuffed or internally fitted articles of bedding/furnishing with 20% of imports, followed by the United Kingdom with 12%. Together they accounted for about a third of the European total. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are France (9.5%), the Netherlands (9.0%), Spain (5.3%) and Sweden (5.1%).

However, you must 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.

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 occasional furniture ’). 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 occasional furniture market, is sensitive to economic cycles. When economic circumstances and

prospects are dim, consumers postpone buying non-essential items. The other way around, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products surge.

In recent years the leading importing countries, as seen in figure 2, 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 stuffed or internally fitted articles of bedding/furnishing 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.

The country is responsible for 20% of total European imports of stuffed or internally fitted articles of bedding/furnishing. German imports increased from €553 million in 2015 to €594 million in 2019, with an average yearly increase of 1.8%. This is driven by the same trends as the European market in general, such as the need for flexible furniture pieces.

Germany sources about 38% of its import value from developing countries. These imports increased from €201 million in 2015 to €225 million in 2019, at an average annual rate of 2.9%. This is the second largest import value from developing countries among the European countries, after the United Kingdom.

In these uncertain circumstances, the combination of a strong market for developing countries and the country's relatively stable economy makes Germany one of the most interesting markets for you.

## **Brexit may negatively impact the United Kingdom's demand**

The United Kingdom is responsible for 12% of European imports of stuffed or internally fitted articles of bedding/furnishing. Its imports increased from €336 million in 2015 to €367 million in 2019. The country sources an impressive 76% (€278 million in 2019) of this from developing countries, the highest value of any European country.

[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 occasional furniture. As such, although the occasional furniture import share of developing countries is high, your prospects for the next few years are modest at best.

## **France's growth is slowing down**

French imports increased from €249 million in 2015 to €284 million in 2019, at an average annual rate of 3.3%. Figure 1 shows that import values are stabilising. The economic growth in France has slowed down after a gradual recovery. Global uncertainties and the effects of social unrest weighed on consumer confidence and the consumption of non-essential products. This is reflected in the country's imports of stuffed or internally fitted articles of bedding/furnishing and is expected to continue in 2020.

The imports from developing countries show a similar pattern, increasing from €106 million in 2015 to €123 million in 2018 and 2019. This adds up to a 43% share in 2019, which is around the average for Europe.

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

With a particularly strong average annual growth of 13%, Dutch imports of stuffed or internally fitted articles of bedding/furnishing increased from €165 million in 2015 to €268 million in 2019. Similarly, imports from

developing countries increased from €98 million in 2015 to €137 million in 2019 (51% of total imports). This performance reflects a long period of consecutive economic growth for the Netherlands.

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 occasional furniture 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.

## **Spain mainly imports from developing countries**

Spain is responsible for 5.3% of European stuffed or internally fitted articles of bedding/furnishing imports. With an average annual growth rate of 4.1%, the country increased its imports from €135 million in 2015 to €158 million in 2019.

Spain sources 63% of its stuffed or internally fitted articles of bedding/furnishing from developing countries, which is considerably above the European average. These imports reached a value of €96 million in 2019, at an average annual growth rate of 4.3% between 2015 and 2019. Whether the country can sustain its demand for occasional furniture largely depends on the effects of the coronavirus outbreak.

## **Sweden is an interesting market for sustainable products**

In terms of import value, Sweden is comparable to Spain. The country increased its imports from €129 million in 2015 to €153 million in 2019, at an average annual growth rate of 4.4%. Sweden sources 43% of its stuffed or internally fitted articles of bedding/furnishing imports from developing countries, matching the European average. These developing country imports grew at a relatively high average annual rate of 6.1% between 2015 and 2019.

Sweden has a relatively strong economy and Swedish importers are well integrated in global value chains. The Swedish government focuses on the sustainable development of the country, making Sweden a particularly interesting market for sustainable products.

### **Tip:**

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 occasional furniture market?**

Occasional furniture plays an important role in some major consumer trends that dominate the HDHT sector: Wellness, Sustainability, Shared Living, Home Sweet Home, Millennial Influence and Playfulness. 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 occasional furniture**

It is hard to predict what direction HDHT consumption will take in the short and longer terms. However, early

trends that are visible to all, are:

- more online sales (but mostly for food and cleaning products)
- more need for entertainment (families are at home, together, all day)
- more renovation work being done, there is time to Do-It-Yourself (DIY)

Home decoration generally is not considered essential shopping and many retail outlets in our industry have therefore had to close or decided 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. The short-term trends just mentioned are partly a continuation of consumer trends that were already ongoing; some may be accelerated.

## **The On-Demand Economy**

The On-Demand Economy, where consumers want the things they need delivered to their doorstep *now*, has gathered force during the pandemic and may become the norm even more than it is now. An important aspect of this new economic reality is that work is based on zero-hour contracts, temporary jobs, or independent one-person small companies.

This will not change after the pandemic, as employers will want to keep their overheads as low as possible and start generating profits again. Consumers without income security may not regain their consumer confidence quickly enough to spark the HDHT market and bring it back to its former status, including generous higher-end segments. What is more, there will be a greater need for convenience, service and attractive pricing, something already quite common in food and fashion.

## **Working from home**

Many consumers may well continue to work from home (more) after the pandemic, having noticed that productivity and communication with colleagues has not suffered. On the contrary, perhaps, as travel time has been reduced and technology has offered convenience. As for HDHT, this could make the home office, or flexible workspaces around the home (and/or garden), the norm. That may be positive for product groups such as (small) Furniture and To Office and To School.

## **Do-It-Yourself (DIY)**

Consumers may continue to 'Do It Themselves', even after the pandemic. This could boost sales in the typical DIY categories and present an opportunity to make the offers even more lifestyle than they sometimes are, to include (ready-made) furniture, dinnerware, and home textiles. The same could apply to garden centres. Overall, this would boost the lower-end segments of the HDHT market.

## **Opting for a more considerate lifestyle**

Trend forecaster [Lidewij Edelkoort](#) makes the point that the current pandemic also makes us feel less stressed, less under constant pressure, and less in need of the latest trend item. We are enjoying a bit more calm and reflection, and appreciate what we have a bit more. This may be the direction that our lives are changing in, after the pandemic. What is more, due to the reduction in global travel, industrial production, and the over-crowding of nature and space in general, we are feeling healthier, enjoying cleaner air, and experiencing less of the usual 'guilt' about our excessive consumption patterns.

In short, Ms Edelkoort believes that many may opt for a more considerate lifestyle when the pandemic is over, or at least that is what she hopes for and advocates. For HDHT, this may translate as: consumers will increasingly embrace timeless designs instead of running after trends. She also advocates that consumers reduce the pressure on our natural resources by recycling, reducing, re-using, as well as refusing (buying less, and more essentially).

### Tip:

Follow the international news, like [The Economist](#), [Time Magazine](#) and [Newsweek](#). Especially news related to how global consumers change their consumption, work and travel patterns. Reflect on the possible short and longer-term effects on HDHT and your business. See how big global companies are responding to the crisis, both to contribute positively to the damage that the crisis does to society, and to protect themselves from the loss of income they are also experiencing. What innovations can help you in your domestic and international marketing, post-crisis? [Bain & Company](#), [McKinsey & Company](#) and [Deloitte](#) are examples of research agencies who follow these big global companies.

## Wellness: Closer to nature

Wellness drives the megatrend of consumers improving their physical and mental health in how they live and how they consume. This will gather greater force due to the global health crisis. To live closer to nature is one way of doing so. This translates in enjoying the garden more, decorating it, eating and drinking and entertaining outside, gardening, and just taking time off and enjoying the outside air. Consumers without a garden will use the balcony or create an indoor garden with the help of plants and flowers.

The same drive also sparks a need for natural materials, such as blonde wood, unbleached textiles with natural dyes. As a final resource, consumers mimic nature by decorating with florals and using earthy tones.

Occasional furniture features prominently here. Both inside and outside, stools, side tables, poufs and bean bags are used for seating, for displaying plants or for their natural properties.

### Tips:

Develop weather-resistant options or use materials that can be used both inside and outside the home.

Use natural materials as much as possible or mimic nature in your designs. Do not coat or varnish your wooden surfaces, just oil or wax them. In textiles, use techniques that create the roughness that belongs to natural fibres such as hemp, jute or unbleached cotton.

Consider the mental side to wellness, expressing itself in yoga and other spiritual practices. Accessories such as poufs (cushions) and small side tables and stools are very much part of this growing segment.

For more information about outdoor home decoration, see our special study on the [garden](#).

Picture 1: Stool with a tree disc top





## Sustainability: People and planet

The Millennials (born between 1980 and 1994) are the dominant age group, globally, and soon they will be the dominant consumer as well. They are listing climate change as their main concern and are used to expressing their preferences through their consumption. As such, people and environmental-friendliness is rapidly becoming a more central consumer need, also in HDHT.

As a general strategy to minimise the effect on the environment, occasional furniture makers are advised to use sustainable materials, such as renewable fibres, textiles and wood species. Recycling is almost commonplace now in textile-based poufs and beanbags, and coming up in stools and side tables. The use of certified materials and processes is a firm requirement in a consumer environment that is low in trust and requires a high level of transparency.

At the design stage, flat-pack solutions will reduce transport volume as well as cost, while design can also involve the easy dismantling of items to create a more sustainable end-of-life phase of the furniture.

There is also a strong focus on social friendliness in workshops and factories. [ILO-based working conditions](#) are a standard requirement for all major certifications in the textile and furniture industry.

Fair trade concepts are traditionally strong in textile and natural-fibre-based poufs and stools. Original fair trade wholesaler-importers can offer stools and side tables with a clear touch of origin, based on the material cultures of specific ethnic groups in Africa, Asia or Latin America. If done well, these can offer the ideal mix of aesthetic and social value to a consumer who is really open to such new, meaningful stories.

### Tips:

Develop socially and environmentally responsible occasional furniture items. Use materials that are local, renewable and/or recycled. Produce effectively and cleanly, pack well to reduce transport space,



and help the consumer dispose of your product sustainably.

If your importer is interested, consider certification options such as fair trade. For more information on these certifications, see our study about [buyer requirements](#).

Benefit from the cultural heritage you may have as a fair trader and use it as a positive design force.

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

## Shared Living: Flexible space-savers

Rapid urbanisation forms a key trend at macro level and will create enormous pressure on space in the megacities of the future. A consumer trend resulting from that is shared living. Shared or communal living is already a global reality. It expresses itself in urban citizens both sharing certain spaces in the home (such as the kitchen, entertainment areas, outdoor space) and keeping certain spaces private (the bedroom, which turns into a combined sleeping, working/studying, entertaining area).

In such a setting, occasional furniture will be more relevant than ever by being portable and multifunctional. Poufs, for example, can be used as a seat, side table, footstool or floor cushion. They can feature both in the shared and private areas, both indoors and outdoors. Where they are shared, the overall style and price level needs to be accessible to all; in the private quarters, the items will have a more personal style and a slightly higher price tag.

Picture 2: Knitted pouf, used as a side table



## Home Sense: Home sweet home

The Home Sense trend talks about the boomer generation (born between 1944 and 1964) retreating into the

safety of their homes, away from a world in crisis. It also discusses the new 'cocooning': consumers creating a warm home to enjoy the company of their near and dear. Needless to say, the current crisis has given the trend an extra dimension.

Poufs, stools and side tables, in particular, are accessories in the home that bring a lot of atmosphere. They are sometimes allowed to stand out in style, sometimes they blend in perfectly with the overall atmosphere of the home. They are fun, non-essential furniture accessories that consumers use to make the home cosier. Poufs often respond to trends, especially in mid-market, and as such as they are quite easily replaced. Side tables and stools usually have a longer lifecycle.

Cosiness is created by decoration and surface effects, which stimulate the sense of sight and touch through colouration and texture. This can come from the natural tones and textures of the original materials, such as cork, water hyacinth, cane and rattan, or (faux) fur. It can also be created by textile techniques, such as knitting, crocheting, felting, leather capitonné, embroidering, cross-stitching and tie-dyeing. Colouration can be added with dyeing or printing techniques (beanbags and poufs), or inlay or veneering processes (stools and side tables).

## Millennial Influence and Playfulness: Fun

Humour can be a powerful driver of consumer behaviour in the HDHT sector. Poufs, stools and especially beanbags are fun items. They offer informal, decorative seating, as opposed to relatively serious, functional furniture such as dining chairs or tables. Especially beanbags often come in bold colours and patterns, while there is no end to the shapes that stools and side tables can be formed into, from very minimalist to expressive. This is very much an area where designers are going all out in their creativity and consumers are embracing it.

### Tips:

Acquire relevant consumer insights about the new Millennial consumers, about what they value and how they shop. Do not forget the existing older consumers either. They still have the disposable income to decorate their homes. Where the Fun trend caters for the younger age group, and Home Sweet Home for an older segment, the Shared Living trend is where the two consumer groups can come together, as shared urban accommodation is often multi-generational.

Consider targeting both groups, by offering design and price differentiation in your occasional furniture.

Increase the convenience of your occasional furniture even more by considering modulatory, multi-functionality and space-saving aspects in your design process.


Being humorous is a great connector, in life as in marketing, but be aware that cross-cultural humour is perhaps the hardest thing to do. If playfulness is not part of your own company identity already, it may be hard to develop.

Indonesian brand [Vivere](#) from Cirebon, West Java, is a successful new player in this product group. They combine a range of materials in stools and side tables, offering contemporary seating with a touch of origin.


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

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