

The European market potential for basketry

The European market for basketry is growing. Most of the imports are sourced from developing countries, making Europe an interesting market for you. Market growth is driven by consumers' need to declutter both their mind and their homes. Demand for natural materials is strong, fitting in with the interest in sustainability. You can further add value to your basketry through storytelling, for example by incorporating traditional designs, craftsmanship and materials.

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1. Product description

In Home Decoration and Home Textiles (HDHT), basketry ranges under the category of 'storage'. Baskets are used for putting loose things out of the way and keeping the house tidy. Besides this functional use, baskets have become decorative objects in their own right. Sometimes to the extent that their decorative value has become more important than their primary storage function.

This study uses the following codes to indicate trade in basketry:

Table 1: Product codes for basketry

Harmonised System (HS)	Prodcom	Description
4602 11	16 29 25 00	Basketwork, wickerwork and other articles, made directly to shape from bamboo plaiting materials
4602 12		Basketwork, wickerwork and other articles, made directly to shape from rattan plaiting materials
4602 19 90		Basketwork, wickerwork and other articles, made directly to shape from other vegetable plaiting materials
4602 90		Basketwork, wickerwork and other articles, made directly to shape from non-vegetable plaiting materials

Besides regular storage use, baskets are often used as packaging material for food items (such as culinary products or wine), picnic hampers or gift baskets.

Tip:

For more information about an alternative use for basketry, see our study about [picnic hampers](#).

Functionality

Baskets are multi-purpose and can store almost any item in the home. Consumers use them to keep rooms tidy, protect items from gathering dust, and/or keep items of the same kind together. They can be found around the house: in the living room, bed- and bathroom (laundry baskets, for example), kitchen and garden. Baskets also have a decorative purpose. As such, functional and decorative baskets can represent different segments. While the focus is on functionality in the low-end market, design and decoration are key in higher-end markets.

Material

Baskets can be made from many different materials, depending on their exact purpose and origin. Most baskets on the European market consist of natural fibres like bamboo, rattan, various types of grasses, wood or paper. Other materials that are commonly used are metal and all kinds of (recycled) plastics.

Size

Basketry comes in various sizes and shapes, depending on the style and purpose. For example, laundry baskets have to be relatively large, while purely decorative baskets can be smaller.

Design

As a relatively decorative product group, basketry differentiates on the basis of aesthetic properties such as colour, technical mastery (like weaving skills), special materials, dimension or shape. Even the lower-end mass segments are often handmade.

Baskets with a mainly functional purpose are designed to maximise storage space. They should hold as many items as possible, fit into cupboards or under beds and be stackable. Such products are often sturdy, sometimes with an internal frame. Internal lining is usually added to protect the fibres from deterioration and prevent contact with the items inside.

Larger baskets can be expensive to ship. Design effort goes into minimising transport costs by making them suitable for flat-packing, nesting or folding.

Durability

Weaving natural materials is popular, but technical expertise can also be demonstrated using artificial fibres. These materials offer increased durability and resistance to dust, dirt and climatic influences, while having the aesthetics of the natural product. This is a particularly important issue at the lower ends of the market, where function and price are key.

Natural materials such as cane, bamboo and most grasses can also be very durable. However, cleaning baskets made of natural materials is harder than those made of artificial fibres.

2. What makes Europe an interesting market for basketry?

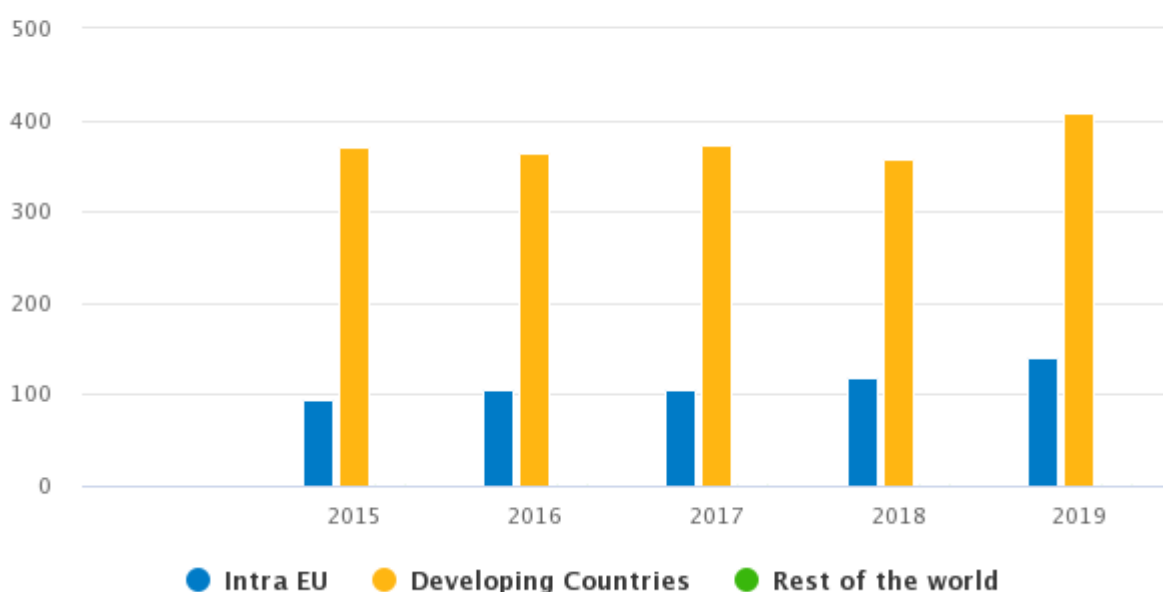
The European basketry market has grown in recent years. Around three-quarters of the import value is sourced from developing countries, making Europe an interesting market for you. Most of this imported basketry is made from natural materials.

The recent [outbreak of the coronavirus](#) and the measures taken against it worldwide have had 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), so the expected impact of the coronavirus on the European market and global supply chains has not been taken into account in this report. For the latest news in your sector, please check [CBI News](#).

The pandemic is expected to affect demand for HDHT products. The current crisis has resulted 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. Lots of brick and mortar retail in HDHT has had to close (being 'non-essential'), and some may not survive the crisis, financially. As a result, the distribution chain in the HDHT sector is also severely affected.

Figure 1: European imports of basketry

in € million



Source: Trademap

Between 2015 and 2019, European imports of basketry increased from €467 million to €552 million, with an average annual growth of 4.3%. Between 2015 and 2019, around three-quarters of the total European basketry import value was sourced from developing countries. With some fluctuations, they increased from €370 million to €408 million. This makes Europe an interesting market for you, as an exporter from a developing country.

About 80% of the basketry that Europe imports is made from natural materials. 12% of this is bamboo, 17% rattan and 71% "other" natural materials such as sea grass, jute, water hyacinth or abaca.

Market growth is driven by consumers' need to improve their wellness by de-cluttering both their minds and their homes. The popularity of basketry made with natural materials fits in well with the sustainability trend. For more drivers of demand, see 'which trends offer opportunities?' below.

Tip:

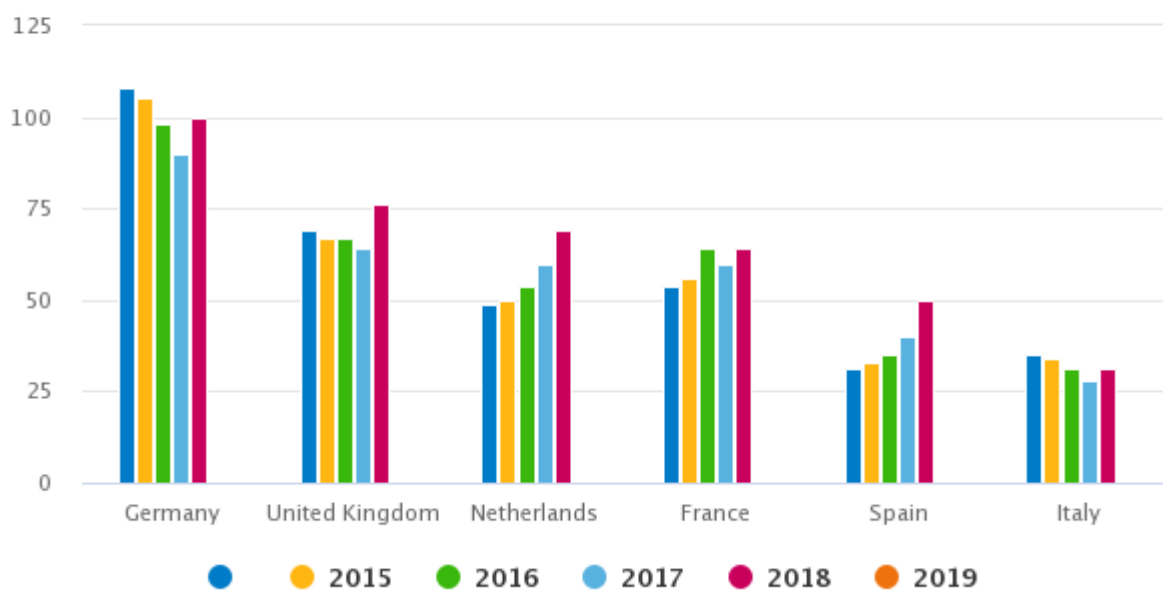
For more information on the short- and long-term impact of the coronavirus on the sector, see our study on [how to respond to COVID-19 in the HDHT sector](#).

3. Which European countries offer most opportunities for basketry?

The larger Western European economies are the main importers of basketry. However, importers in these countries generally sell their products across Europe. Your best strategy therefore is to focus on a particular segment, rather than a specific country.

Figure 2: Leading importing countries of basketry

in € million



Source: Trademap

In 2019, Germany remained Europe's leading importer of basketry with 18% of imports, followed by the United Kingdom (14%), France (13%) and the Netherlands (12%). Together, they accounted for more than half of the European total. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are Spain (9.1%) and Italy (5.6%).

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

In terms of marketing, you need to realise that countries are not markets. In HDHT, there are different market segments, ranging from low to high (also see our study on [market entry](#) for basketry). Every European country has these segments, although their size may vary per 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, instead of a specific country. These distributors will then sell in that segment across Europe.

Real private consumption expenditure

An important indicator for growth in demand is real private consumption expenditure. The HDHT sector, which includes the basketry market, is sensitive to economic cycles. When economic circumstances and prospects are dim, consumers postpone buying non-essential items. On the other hand, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products 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 coronavirus outbreak. 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

Between 2015 and 2018, German basketry imports decreased by 5.8% per year on average. However, in 2019, they recovered strongly, surging by 11% to reach €100 million. This resulted in an overall average annual growth rate of -1.8% per year.

Germany sources about three-quarters of its import value from developing countries. These imports decreased from €87 million in 2015 to €74 million in 2019, despite a strong bounce back in 2019. However, this decrease is mainly caused by declining imports from the dominating supplier, China. Germany's imports from other developing countries such as Vietnam and Indonesia were relatively stable at a combined value of around €32 million. This suggests there could be opportunities for you.

Germany is the largest economy in Europe, 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. In fact, according to the Economist, [Germany will be the first major European economy to recover from the current crisis](#). This expectation is based on both the country's healthy finances before the crisis and its large industrial sector, the reboot of which also benefits suppliers abroad.

In addition to having a large domestic market, Germany is also a key trade hub within Europe. Combined with a stable market for developing countries and the forecast economic recovery, this makes Germany an interesting market for you.

Brexit may negatively impact the United Kingdom's demand

Like in Germany, British basketry imports decreased between 2015 and 2018. However, recovery was so strong in 2019 that it resulted in an overall average annual growth rate of 2.2% as imports reached €76 million. The United Kingdom sourced 86% of this from developing countries, which is considerably above the European average.

China continues to be the country's main basketry supplier with 59% of imports in 2019. At the same time, imports from other developing countries increased by 10% per year on average. Vietnam, the second leading supplier, performed particularly well. Its supplies increased by 13% per year between 2015 and 2019, illustrating that there are opportunities on this market despite China's dominance.

[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 basketry. As such, although the import share of developing countries is high, your prospects for the next few years may be modest.

France's growth is slowing down

With an impressive average annual growth of 9%, French imports of basketry increased from €49 million in 2015 to €69 million in 2019. The imports from developing countries show a similar pattern, increasing from €38 million in 2015 to €48 million in 2019. This adds up to a 70% share in 2019, which is comparable to the European average. France's leading basketry suppliers are China (34%) and Vietnam (17%).

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 expected to be reflected in the country's imports of basketry in the coming years.

The Netherlands is an important European trade hub

Dutch imports of basketry increased from €54 million in 2015 to €64 million in 2019, at an average rate of 4.2% per year. Similarly, imports from developing countries increased from €49 million in 2015 to €55 million in 2019. This represents an import market share of 86%, which is among the highest in Europe. Again, China is by far the leading supplier with a 48% share. Indonesia and Vietnam follow at a distance, with 18% and 12% respectively.

Besides Brexit and the coronavirus pandemic, 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 basketry consumption.

Since the Netherlands is a big re-exporter of goods, the impact on the imports of HDHT products 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. However, its large market for developing countries does continue to make the Netherlands a relatively interesting market for you.

The economy in Spain is expected to struggle

Spain increased its basketry imports from €31 million in 2015 to €50 million in 2019, at an impressive average yearly rate of 13%. Its imports from developing countries increased at a similar rate, from €27 million to €43 million. This represents an import market share of 86%, which is among the highest in Europe. Spain's main basketry suppliers are China (43%) and Vietnam (17%). Indonesia, India and Morocco follow at a distance, meaning Spain's top 5 leading suppliers are developing countries.

Whether Spain can sustain its demand for HDHT products largely depends on the effects of the coronavirus pandemic. At the moment, [the Spanish economy is forecast to experience the deepest contraction in Europe and be among the least recovered European economies by end-2021](#). This, of course, limits your opportunities in Spain for the coming years.

Italy's economy is expected to recover particularly slowly

Italian imports of basketry decreased from €35 million in 2015 to €31 million in 2019, despite some recovery in 2019. This resulted in an average annual decrease of -2.2%. This was mainly due to declining imports from China, the country's leading supplier, which dropped from €24 million to €16 million. Imports from other developing countries were relatively stable, showing an average yearly growth of 3%.

The economic growth in Italy is likely to slow down as the country is particularly affected by the current pandemic. In fact, out of the major European economies, [Italy is expected to be the slowest to recover](#). This is expected to affect consumer confidence and the consumption of non-essential products in the coming years.

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 basketry market?

Basketry plays a strong role in some major consumer trends that dominate the HDHT sector, including Wellness and Sustainability. For more information, see our study about [trends for HDHT](#). 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 basketry

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

Home decoration generally is not considered essential shopping and much retail in our industry has 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 reluctant to spend beyond food, cleaning products, and other household essentials.

However, some areas/product groups could benefit:

- wellness/fitness at home
- working from home
- cooking

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

- a re-appreciation of their homes and the desire to make their home more pleasant, practical and comfortable overall
- bringing the outdoors inside and vice versa
- cleaning out clutter

These trends are partly a continuation of consumer trends that were already ongoing; some may be accelerated. 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. These developments emphasise the importance of the existing trends of both wellness and sustainability in the basketry market.

Wellness: De-cluttering the home and the mind

Wellness drives the megatrend of consumers improving their physical and mental health in how they live and how they consume. European consumers increasingly struggle with the combination of small urban living spaces and high levels of consumption. They are embracing baskets as a welcome aid in achieving and maintaining a tidy home.

With excess items neatly stored in baskets, consumers create physical space as well as 'headspace', helping them to de-stress. The recent lockdowns in European countries have made this especially relevant, as people were forced to stay at home together in relatively small spaces.

The functional segment requires practical storage solutions. Important aspects include a good price, easy availability (intensive distribution), as well as durability and cleaning options in case of natural materials. The decorative segment values beauty over functionality and is less price sensitive. Consumers of these products are willing to shop around and pay attention to the stories behind the products.

Picture 1: Collection of storage/laundry baskets in various designs



Tips:

Decide on your position in the market for storage and develop your marketing mix accordingly. Your choice will affect margins, order volumes, communication strategies and logistics.

See our article on how [the COVID-19 crisis boosts the importance of the wellness trend in HDHT](#) for more information.

Sustainability: People and planet

European consumers are increasingly adopting more sustainable lifestyles. The Millennials (born roughly between 1981 and 1996) 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, social issues and sustainability are rapidly becoming a more central consumer need, also in HDHT.

For basketry, sustainability issues are mainly related to the choice of materials, renewable resources, water treatment, dyeing and labour conditions. Transport, energy consumption and use and waste/disposal practices also play a role. Taking steps towards a more sustainable product and process may add value to your baskets. Various projects have already made an effort to make the entire basketry value chain environmentally and socially sustainable, such as projects from [WWF](#) in the Greater Mekong region and [WIPO](#) in Kenya.

Storytelling through traditional designs, craftsmanship and materials

Basketry embodies 'origin' in its materials, techniques and meanings. It has cultural stories to tell, through which you can create added value. Basketry is traditionally an integral part of the fair-trade segment. Especially handmade items with a sense of origin via ethnic patterns, weaving techniques or unique materials. Such basketry is often made by women in rural areas. It lends itself well to telling the story about the importance of meaningful work and income in developing countries. This has undoubtedly kept many interesting weaving skills alive.

As European consumers are increasingly travelling to more distant places, they are discovering new stories. Due to its very nature, basketry has always had a strong link to the origin of ethnic groups or regions. Africa has a strong tradition in basketry, from the Kenyan kiondo to the Ghanaian bolga basket, the Zulu graphics or the raffia basketry from Madagascar. Asia also has a tradition in basketry, as do some Latin American cultures.

The renewed appreciation of handmade techniques in natural materials may be strengthened by the loss of craft skills in Europe, as well as a growing tiredness of standardised, mass, industrial products. Therefore, handmade has the potential to go premium.

Picture 2: Woven detail of a Nigerian basket



Tips:

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

Use local materials, techniques and designs in your products and show your craftsmanship by using intricate weaves, patterns or shapes. Showcase the handmade aspect of your products by using organic, free shapes rather than rigid forms that resemble industrial production. A good example of this is [Tashinda Putraprima](#) (Indonesia) who produce finely crafted basketry from locally available and renewable materials, using a village-based manufacturing system that allows their artisans to work at home.

If your products have a unique origin and/or story, communicate the details in terms of special techniques, materials, producers, processes or meanings. This may add value to your concept and your importer's.

Invest in experimentation to increase the levels of the craftsmanship of your artisans and your products, as well as to expand and refresh your range. In decorative basketry, quality perception is directly related to your product's aesthetic level.

Downward price spirals are a challenge

A countertrend is the commoditisation of baskets, especially in the functional segment. Particularly in the lower ends of the market, this is due to the dominance of a few large-scale suppliers from the Far East. In exchange for volume, they are able to accept small margins by fine-tuning their processes and/or squeezing production costs. This has driven overall price levels down and led the consumer to see these baskets as low-priced items, expecting to get 'a lot for little' (sets). This makes the room for differentiation in the lower-end market very small.

Prices are also under pressure in the mid-end market, where the basket has become an image item for some typical mid-market styles like cottage, colonial or romantic/nostalgic. Players in this segment often struggle to differentiate from their competitors. As a consequence, products in this segment tend to look alike, with their typical whitewash, lettering and inside fabric lining. This has resulted in price pressure, a marked decrease in product quality and a lower value perception.

Tips:

Focus on operational excellence if you wish to target the volume market despite the strong competition. Be efficient in your purchasing of raw materials, inward and outward logistics, productivity and overhead management. Create economies of scale: by increasing the scale of your production, you can lower your cost per item.


Be precise and consistent in your style if you wish to target the mid-end market. Study the relevant style(s) and assist your main buyers by taking the initiative in product development to help them stand out in a market under pressure.


[WomenCraft](#) has been founded to increase economic opportunity in the post-conflict, tri-border area of Rwanda, Burundi and Tanzania by bringing rural women together, facilitating their growth and connecting their artistry to the global marketplace. In this process, the company has succeeded in developing basketry for the higher middle segment, which they call 'decorative storage', using local natural and upcycled materials in simple, sophisticated designs. These baskets can be combined with wall hangings made with the same materials and techniques.


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

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