



Exporting garden furniture to Europe

The European market for garden furniture is growing. Consumers increasingly use their garden as living space, a place for active and passive recreation. Therefore, outdoor furniture has to meet the same needs as indoor furniture. Your products have to provide comfort and luxury. Sustainability and design are becoming increasingly important. Another trend is developing furniture for relatively small spaces like balconies. The United Kingdom is an especially interesting focus country, with a strong market for developing countries.

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1 . Product description

Garden furniture is a very wide product group. It includes:

- garden seats
- tables of varying sizes
- sofas and benches
- swing seats
- day beds
- sun loungers
- stools

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

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
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9401.5100	3100.1230	seats of bamboo or rattan
9401.5900		seats of cane, osier or similar materials (excluding those made of bamboo or rattan)
9403.8100		furniture of bamboo or rattan (excluding seats and medical, surgical, dental or veterinary furniture)
9403.8900		furniture of cane, osier or similar materials (excluding of bamboo, rattan, metal, wood and plastics, and seats and medical, surgical, dental or veterinary furniture)

For the consumer, the garden is a place to relax and sunbathe. But also a place to eat and entertain. Therefore, garden furniture can be split into active and passive seating.

Active seating is:

- formal;
- ergonomically designed;
- relatively permanent (not intended to be moved around);
- usually sold in sets.

Examples include dining tables with chairs and sets with a couch, sofas and table.

Passive seating is:

- lightweight;
- can be moved around with the sun;
- usually sold individually.

Examples include lazy chairs, loungers and deckchairs.

Quality

Functionality

For garden furniture, functionality is a basic quality requirement. It needs to be solid and safe to use.

Europeans are relatively tall, so their furniture is relatively high too. For instance, seating furniture ranges from 30cm to 45-50cm in height. Tables are much higher, usually around 75 cm. Ask your buyers for their requirements.

You also need to think of standard cushion sizes. For normal chairs, cushions are around 46x48cm. For lounge chairs and sofas they are larger, at 60x60cm or 70x70cm.

Material

Garden furniture can be made of various raw materials, like:

- wood, such as teak or oak
- metal
- rattan
- bamboo
- cane
- various synthetic materials
- fabrics

The quality of the raw material and finishing of the product are important. Convenience is a central need for consumers buying garden furniture. They like low-maintenance, easy-to-clean, climate-

proof products. This favours tropical hardwoods and synthetic or high-tech materials.

Durability

Garden furniture is an outdoor product. It needs to be able to withstand changing weather, Ranging from high levels of sun to rain and snow. Otherwise, it needs to be shielded with for instance a protective cover.

Design

The aesthetic value of garden furniture is high, especially in the upper segments of this product group. Innovation is increasingly important in terms of new materials and design. However, the furniture still needs to provide comfort and durability.

Labelling

- Information on the outer packaging should correspond with the packing list sent to the importer.
- Labels on the outer box of garden furniture should include the following:
 - producer
 - consignee
 - material used
 - quantity
 - size
 - volume
 - caution signs
- EAN or barcodes on the product label are common in Europe.
- Your buyer will specify what information they need on the product labels or on the item itself. For instance logos or 'made in...' information. This is part of the order specifications.
- Use the English language for labelling, unless your buyer indicates otherwise.

Packaging

Importer specification

You should pack garden furniture according to the importer's instructions. They have their own specific requirements for:

- the use of packing materials;
- the filling of cartons;
- palletisation;
- the stowing of containers.

Always ask for the importer's order specifications. These are part of the purchase order.

European legislation

Europe has specific [packaging and packaging waste legislation](#). For instance, it restricts the use of certain heavy metals.

Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as

- packing cases
- boxes
- crates
- drums
- pallets
- box pallets
- dunnage

Damage prevention

Proper packing minimises the risk of damage caused by shocks. How an item is packed for export depends on how easily it can be damaged. You should make sure the items inside a cardboard box cannot damage each other.

Furthermore, the packing usually consists of inner and outer cardboard boxes. The outer boxes prevent damage to the inner boxes when they are stacked inside the container. The inner boxes are often filled with materials such as bubble wrap or paper, depending on the buyer's preferences, to protect the products.

Dimensions and weight

Make sure your packaging is easy to handle in terms of dimensions and weight. Standards are often related to labour regulations at the point of destination. The buyer will have to specify them.

Cartons are usually palletised for air or sea transport. Exporters have to optimally utilise the available pallet space.

Cost reduction

Nesting, stacking or flat-packing the items inside the container reduces costs. Consider this in your products' design phase.

Packing has to ensure maximum protection. However, you also have to avoid using excess materials or shipping 'air'. Waste removal is a cost to buyers. You can reduce the amount and diversity of packing materials by:

- partitioning inside the cartons by using folded cardboard
- matching inner boxes and outer cartons by using standard sizes
- considering packing and logistical requirements when designing your products
- asking your buyer for alternatives.

Material

Importers are increasingly banning wooden crates and packing. This is due to their unsustainability and high cost of both the material and the disposal thereof. Economical and sustainable packing materials are more popular. Using biodegradable packing materials can be a market opportunity. For some buyers, it can even be a requirement.

Wooden garden furniture

Wooden garden furniture can mould or crack. You need to properly dry the wood after production. Condensation inside the container during transport can cause mould. This is due to by humid air that becomes colder at night and warmer during the day. You need proper ventilation inside the container to prevent this. Before shipment, you must make sure the containers have air holes. There are also special products available which help reduce humidity amongst the cargo. Make sure the importer's instructions are followed here.

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

European imports of garden furniture have recovered strongly from a dip in 2013. Developing countries are Europe's main garden furniture suppliers. Europe's main garden furniture importers are:

- France
- Germany
- the United Kingdom

The United Kingdom is an especially interesting focus country, with a strong market for developing countries.

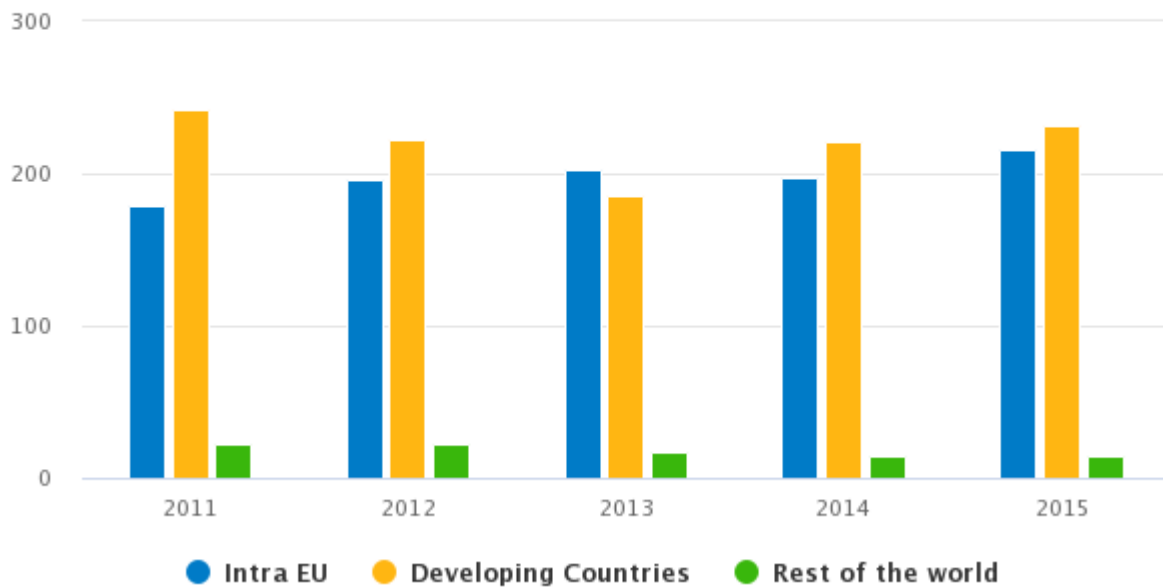
Trade statistics

(!) The following data only gives an indication of trade in garden furniture. No separate statistics are available. The figures below cover "seats and furniture of cane, osier, bamboo, rattan or similar materials". Other furniture and furniture of different materials is not included as available statistics are too limited. Therefore, you should take care when drawing conclusions based on these figures.

Imports

Figure 1: European imports of garden furniture

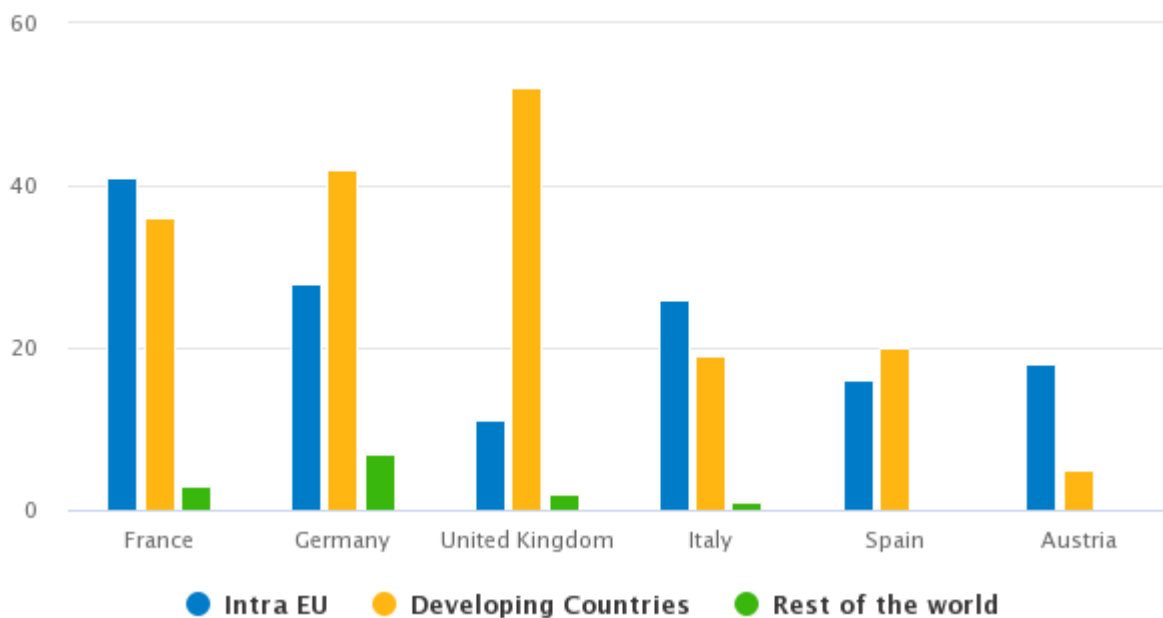
By main destination



Source: Trademap

* This figure covers seats and furniture of cane, osier, bamboo, rattan or similar materials.

Figure 2: Main importers of garden furniture 2015

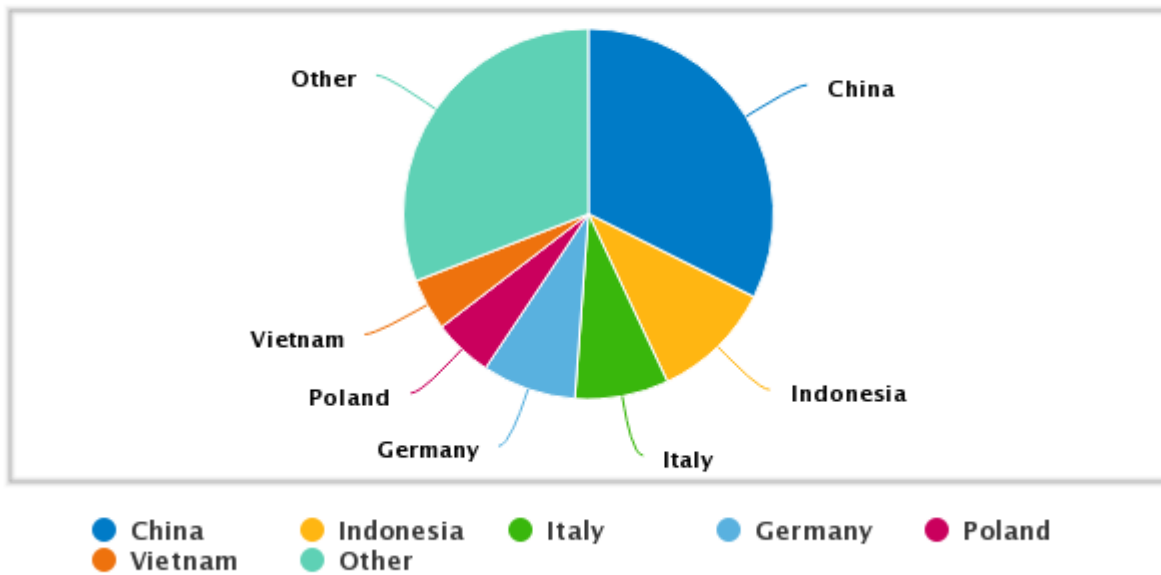


Source: Trademap

* This figure covers seats and furniture of cane, osier, bamboo, rattan or similar materials.

Figure 3: Leading suppliers of garden furniture

2015



Source: Trademap

* This figure covers seats and furniture of cane, osier, bamboo, rattan or similar materials.

- In 2014 and 2015, European imports of garden furniture recovered strongly from a dip in 2013. They reached € 463 million in 2015. This resulted in an average annual growth rate of 1.0% between 2011 and 2015.
- In the coming years, European imports are expected to keep growing moderately.
- The dip in total imports in 2013 mainly reflects a dip in imports from Developing Countries.
- Developing countries are Europe's main source of garden furniture. They supply over 50% of European imports. This amounted to € 232 million in 2015. In the coming years, this share is predicted to remain stable.
- France is Europe's leading importer of garden furniture, with € 80 million in 2015. Germany (€ 76 million) and the United Kingdom (€ 64 million) follow.
- When it comes to imports from developing countries however, the United Kingdom is leading with € 52 million. This is more than 80% of its total garden furniture imports,
- The United Kingdom's imports from developing countries grew with € 3.7 million between 2011 and 2015. In Sweden and the Netherlands, these imports also grew, with € 2.9 million and € 1.0 million respectively. These patterns are expected to continue.
- In the other main importing countries however, garden furniture imports from developing countries declined.
- China dominates European garden furniture imports, with 33% in 2015. Other leading suppliers from developing countries are Indonesia and Vietnam.

Tips:

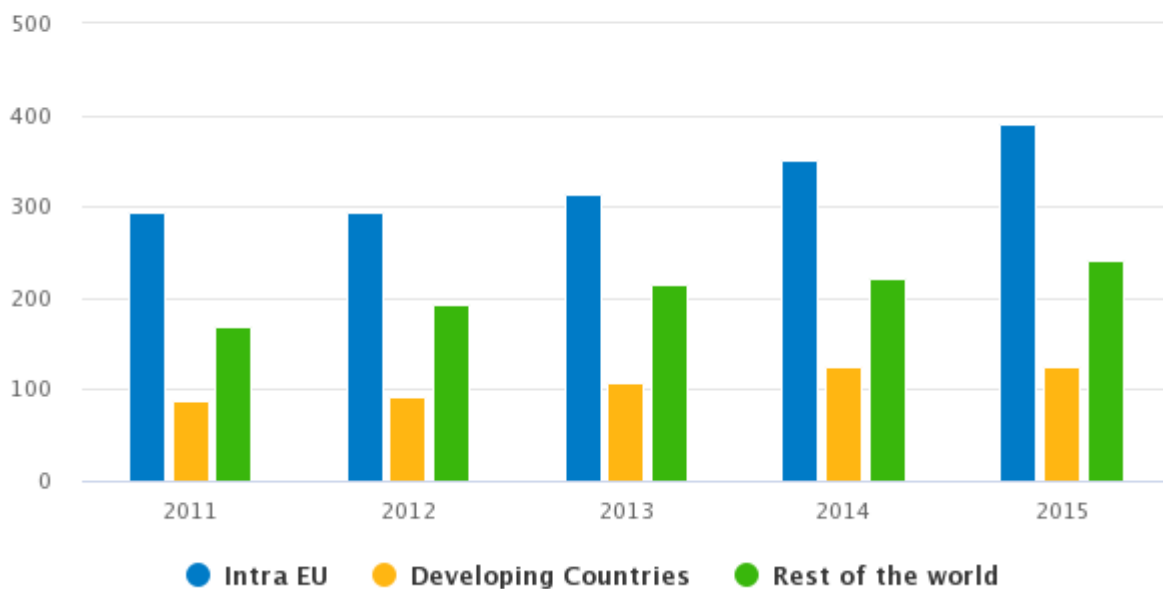
- Focus on France, Germany and the United Kingdom, as they are Europe's largest importers of garden furniture. The United Kingdom is an especially interesting focus market, with its large imports from developing countries.
- Also consider the Netherlands and Sweden. Their growing markets for garden furniture from developing countries make them promising as well.
- Compare your products and company to the strong competition from China, as well as Indonesia and Vietnam. You can use [ITC Trademap](#) to find exporters per country. You can

- compare:
- market segment
 - price
 - quality
 - target countries

Exports

Figure 4: European exports of garden furniture

By main destination



Source: Trademap

* This figure covers seats and furniture of cane, osier, bamboo, rattan or similar materials.

- European garden furniture exports consist mainly of trade within Europe.
- Italy (€ 305 million) and Poland (€ 171 million) are Europe's leading garden furniture exporters. While Poland mainly exports low-value products, Italy is known for its high-value products.

Production and consumption

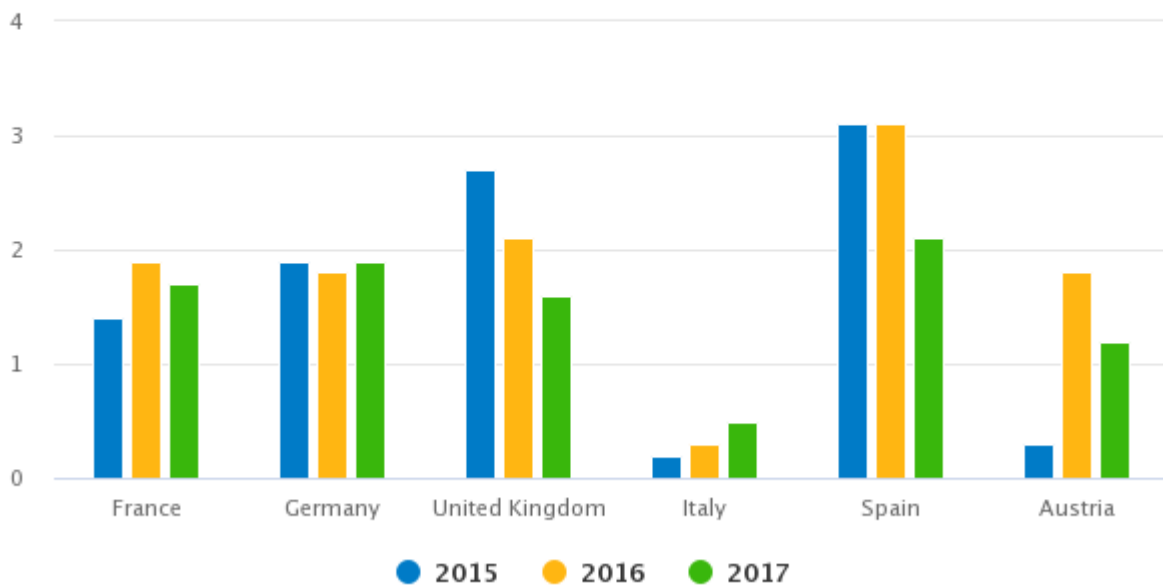
- Europe's demand for garden furniture is much higher than its production. Almost three times as high, in fact. This drives the need for imports, making Europe an interesting market.
- European production of garden furniture is slowly recovering from a dip in 2012 and 2013. It increased from € 19 million in 2013 to € 26 million in 2014. However, this is far from its 2010 and 2011 values of € 41 million.
- Similarly, consumption increased from € 61 million 2013 to € 73 million in 2014.
- With € 8.2 million, Spain is responsible for 31% of European production of garden furniture. The United Kingdom is responsible for 22%, with € 5.8 million.
- European consumption of garden furniture is highest in The United Kingdom at € 18 million. Germany follows with € 14 million.

Macro-economic indicators

Real private consumption expenditure

Figure 5: Real private consumption expenditure growth

In %



Source: Eurostat

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2015 and 2017, European private consumption expenditure is expected to increase. This means that consumption of luxury and decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on these products. Consumers in mature markets already spend a fair amount of money on luxury, so growth in their consumption will be moderate.

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

Outdoor living

An on-going trend is that the garden is becoming part of the living area. It is turning into a second living room. European consumers like a completely decorated outdoor space. Outdoor furniture has to meet the same needs as indoor furniture:

- comfort
- luxury
- a coherent style
- an expression of taste

The popularity of outdoor kitchens continues to grow as well, moving beyond simple barbecues.

Tips:

- Comfort and luxury need to be part of your product design. Especially if you target high-end segments. Use indoor furniture for inspiration. Discuss design options with your buyers.
- Design your furniture to be fit for both indoor and outdoor use. Use durable and lightweight materials, as well as specific finishes to allow for outdoor use.

- Create concepts and complete ranges in garden furniture. For example, match sofas with luxurious cushions, tables and other decorations.
- Consider the active/passive use of garden furniture (see Product description). Create concepts that fulfil these different needs.

Furniture for small outdoor spaces

In urban settings, outdoor spaces are smaller than in suburban locations. Think of balconies or roof terraces. Consumers want to decorate these areas as well. However, they have limited space for large pieces of garden furniture.

Tip:

- Take the demands of consumers with different amounts of outdoor space into account. Include smaller, adaptable or storable furniture products your range.

Design

Garden furniture design can range from simple and clean styles to elaborate novelty shapes. This depends on whether it functions as an everyday basic or a more expressive statement piece:

- For lower-end market segments, garden furniture is designed to easily blend in with any style.
- Midmarket segments provide the romantic retro classics.
- The higher segments include both minimalistic and more expressive styles.

Using materials that are new to the market or have interesting properties adds to your design.

Tips:

- Study your segment well. Discover what overall style European consumers prefer.
- Within that style, always add your own design features. Features that are new and attractive to buyers. For instance:
 - shape
 - material use
 - techniques
 - colour
- Use interesting materials, or a combination of materials.
- Work together with European designers. Create a look that is desired in Europe but still makes use of your own strengths.

Personalisation

European customers are increasingly trying to personalise their living spaces. This trend is relevant

to garden furniture as well. Products are available in different options. Customers can make combinations according to their wants and needs.

Tip:

- Design products that consumers can easily personalise. Offer products in different colours and sizes that can be combined. A good example is modular furniture, which consists of individual components. This helps consumers to create a sitting arrangement according to their specific needs and context.

Sustainability

Sustainability continues to be an important trend in garden furniture. Recycled materials are popular, such as reclaimed teak wood, scaffolding-wood or recycled plastic. Materials such as bamboo offer a niche product in eco-design furniture. Bamboo grows very quickly, making it sustainable and renewable.

However, sustainability also poses a threat to non-European suppliers. Products that are 'Made in Europe' are increasingly popular. CO2 emissions from transporting these local products are lower.

Tips:

- Consider sustainable production methods. Think of:
 - material purchasing and processing
 - production
 - transport
 - use of the product
 - degradability
- Consider certification, if it adds value to your products in your segment. See our study about [buyer requirements for Home Decoration & Home Textiles](#) for more information.

For more information on trends, see our [special study about the garden](#). Also see our study about [trends for Home Decoration & Home Textiles](#) for general trends in the sector.

4 . What requirements should garden furniture comply with to be allowed on the European market?

See our study about [buyer requirements for Home Decoration & Home Textiles](#) for the requirements applying to garden furniture.

What legal and non-legal requirements must your product comply with?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including garden furniture. It states that all products marketed in Europe must be safe to use.

Tips:

- Read more about the [General Product Safety Directive in the EU Export Helpdesk](#).
- Also use your common sense to ensure normal use of your product does not cause any danger.
- The [RAPEX database](#) lists products that the European Union has rejected at the border, or withdrawn from the market. Check the database for (garden) furniture for an idea of what issues may arise.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For garden furniture, this includes:

- cadmium compounds in various applications
- arsenic and creosotes as wood preservatives

Tip:

- Use local experiences and produce in your product offering. For example:
 - [REACH Annex XVII a list of all restricted chemicals;](#)
 - [Information on REACH for companies established outside Europe;](#)
 - [Questions & Answers on REACH.](#)

Timber Regulation

According to the European Union's [Timber Regulation](#), you must prove any timber used was harvested legally. This also applies to wooden garden furniture. Products with a [FLEGT](#) or [CITES](#) license comply with the Timber Regulation.

Tips:

- For more information, see the [Frequently Asked Questions about the Timber Regulation](#).
- The EU FLEGT Facility has more information about [FLEGT licensing](#).
- For more information on CITES permits, you can contact your [National CITES Management Authority](#).

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market.

Think of sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes:

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI code of conduct. To prove compliance, the importer can request an audit of your production process. Once a company is audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

Tips:

- Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.
- Buyers appreciate a good story. If you can show that you considered your company's performance, this may be a competitive advantage. For instance with a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#).
- For more information, see our special study on [Sustainability in the Home Sector](#).

What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your garden furniture is labour intensive, fair trade certification can give you a competitive advantage.

Common fair trade certifications are from:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#)

Tips:

- Ask buyers what they are looking for. Especially in the fair trade sector, you can use the story behind your product for marketing purposes.
- Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

FSC certification

[FSC](#) (Forest Stewardship Council) certification is the most common label for sustainable wooden products, including garden furniture. The FSC label guarantees that a product's source material

comes from responsibly managed forests. These products are especially popular in Western European markets.

Tip:

- For more information, see the [three steps towards FSC certification](#).

5 . What competition do you face on the European garden furniture market?

The competition for garden furniture does not differ significantly from the sector in general. See our study about [competition for Home Decoration & Home Textiles](#) for a general overview. Also refer to our [top 10 tips for doing business with European buyers](#).

6 . Through which channels can you get garden furniture on the European market?

The market channels and segments for garden furniture do not differ significantly from the sector in general. See our study about [market channels and segments for Home Decoration & Home Textiles](#) for a general overview.

Market channels

In the furniture sector, there are more retail importers than wholesale importers. In Europe, garden furniture is commonly distributed through:

- garden centres
- Do-It-Yourself outlets
- furniture retailers
- general home decor retailers

E-commerce

E-commerce in home decoration is increasing. Retailers often combine online and offline channels. Consumers research and purchase products online. They shop around and compare prices on home decoration items. For larger garden furniture, they search information and compare offerings online. The purchase of these larger items often still occurs in offline retail locations. That way, consumers can experience the feel of the products. For example, to check the materials and how comfortable the furniture is. It gives them a better idea of a product's colour, size and shape.

To supply e-commerce, you have to be able to work with:

- individual packing;
- individual labelling;
- limited minimum orders.

Tips:

- See our special study about [E-commerce in Home Decoration & Home Textiles](#) for more information.
- Target e-tailers if you can meet the additional requirements.

Trade associations and fairs

These trade associations and fairs are useful sources for finding trading partners in Europe.

- [Ambiente](#), Frankfurt, February
- [EFIC](#), European Furniture Industries Confederation
- [FENA](#), European Federation of Furniture Retailers
- [IMM](#), Cologne, January
- [Maison et Objet](#), Paris, January (main) and September
- [Salone del Mobile](#), Milan, April (designer)
- [Spoga + gafa](#), Cologne, August (specifically for the garden)
- [UEA](#), European Federation of Furniture Manufacturers
- [UNECE](#), interesting source for marketing info and general links about the wood industry

Market segments

Market segments in garden furniture are determined by price and value.

Low segment

The lower end of the market wants to keep prices friendly and design accessible. It has to suit an average consumer profile.

Middle segment

In the midmarket segment, functionality and style go hand-in hand. This consumer wants value for money and a trendy or accepted style.

High segment

In the higher segments of the market, supreme craftsmanship, a luxury feel and brand are important. This gives consumers an opportunity to express themselves.

7 . What are the end market prices for garden furniture?

Garden furniture is a very broad product group. Therefore, prices cover a wide range. As an example, compare the low to high segments for a wooden dining set for 6 persons. Table 2 gives an overview of the varying prices for this product.

Table 2: Indicative consumer prices wooden dining set

Low-end	Middle-low	High-end
€ 150-400	€ 400-1,100	€ 1,100 and more

Consumer prices depend on the value perception of your product in a particular segment. Your marketing mix influences this:

- product benefits (such as design, functionality and durability) ;
- promotion (brand or not, communication of product benefits);
- points of sale (reseller positioning);
- price.

Consumers' price expectations at a garden centre will be different from those at a premium department store.

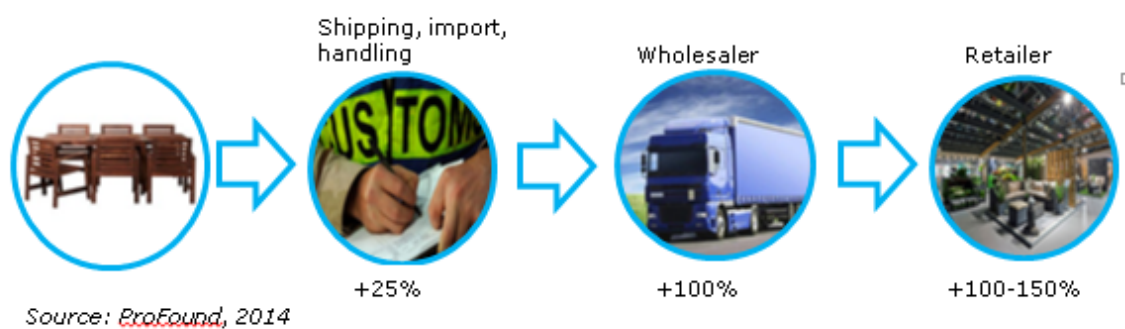
Tips:

- The value perception of your product in the chosen segment determines its price. You must offer what is expected in your chosen target segment in terms of design, for instance. Your price needs to match that of similar products. To determine your price, study

consumer prices in your target segment. Adjust your costings accordingly.

- Make sure your Terms of Trading and Payment reflect both retailers and wholesale importers. For instance, a retailer's value chain might be shorter. You may need different price lists for both types of importers. Retail price is normally 2.5 to 3 times the price of wholesale.
- Some buyers may prefer to combine different orders in your country. In this case, they pick up the different products at various factories or warehouses. Then the buyer transports the products together in a so-called "consolidated shipment". Because of this, they require a different set of terms, based on ex-works or other arrangements.
- Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your positioning in the market.

Figure 6: Indicative price markups for garden furniture in %



Source: ProFound, 2014

Please review our [market information disclaimer](#).