

The European market potential for cushion covers

Approximately 60% of European imports of textile furnishings, including cushion covers, originates from developing countries. This makes Europe an interesting market for you. Good ways to add value to your product include focusing on craftsmanship, design, and sustainability. Creating cushion covers as part of a wider range of similar products or in combination with bedspreads and throws also offers opportunities. In addition, the option to work via co-creation can give you a competitive edge.

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Within the home decoration and home textiles (HDHT) sector, cushion covers fall under the home textiles category. A cushion cover is a fabric case that covers cushions, like a pillowcase does. Cushion covers function primarily as decoration, providing an inexpensive way for consumers to express personal styles both in the living room and as decoration in the bedroom. At the same time, they are used as protection for cushions, since the cushions themselves are not frequently washed or replaced.

This study uses the following codes to indicate trade in cushion covers:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
6304 91		Other textile furnishing articles, knitted or crocheted
6304 92		Other textile furnishing articles, of cotton, not knitted or crocheted, of cotton
6304 93		Other textile furnishing articles, not knitted or crocheted, of synthetic fibres
6304 99		Other textile furnishing articles, not knitted or crocheted, of other (non-synthetic) materials
	13 92 16 60	Other textile furnishing articles

Functionality

Cushion covers serve primarily as decoration for the sofa, couch, and bed. They are not intended as pillowcases for the pillows you sleep on.

Material

Cushion covers are available in a wide variety of fabrics. Common natural fibres and materials for cushion covers include cotton, linen, wool, silk, jute, and leather.

Size

Sizes of cushion covers vary, matching the sizes of the cushions. The most common sizes on the European market are:

- 40 cm x 40 cm
- 40 cm x 65 cm
- 45 cm x 45 cm
- 50 cm x 30 cm
- 50 cm x 50 cm
- 65 cm x 65 cm

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

Design

Cushion covers come in a variety of designs, depending on their origin and the targeted market segment. Various cushion shapes are available in Europe, including round, heart-shaped, and cylindrical bolster cushions.

1. What makes Europe an interesting market for cushion covers?

The COVID-19 pandemic and the measures taken to control it worldwide are 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 COVID-19 pandemic 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](#).

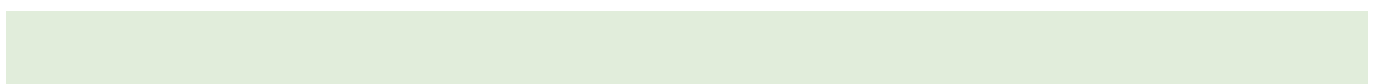
The pandemic is expected to affect demand for HDHT products. In times of economic crises, consumers postpone buying non-essential items. This means new cushion cover purchases may be limited to replacements for broken or worn items. On the other hand, the lockdown in many countries has increased the attention people have for their homes, so this growing focus may also have a positive effect. At this stage, it is very hard to predict the exact consequences of the pandemic for people's buying decisions.

Because no specific trade data is available for cushion covers, these statistics cover textile furnishing articles.

Between 2015 and 2019, European imports of textile furnishings increased from €851 million to €966 million, at an average annual growth of 3.2%. In comparison, worldwide cushion covers imports showed an average annual growth of 1.1% between 2015 and 2019, reaching €2.8 billion. This means the European market accounts for approximately a third of the total worldwide cushion cover imports.

Between 2015 and 2019, approximately 60% of the total European import value was sourced from developing countries, mainly from China, Morocco, and India. This translates to an increase from €538 million to €581 million. This makes Europe an interesting market for you, as an exporter from a developing country.

The increasing interest in sustainably produced items and traditional craftsmanship and design can stimulate the cushion cover market. For more drivers of demand, see 'Which trends offer opportunities?' below.



Tip:

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

2. Which European countries offer most opportunities for cushion covers?

The larger Western European economies are the main importers of textile furnishing articles in the EU. 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.

Spain and Germany remained Europe's leading importers of textile furnishings with 17% of European imports each. France and the United Kingdom follow with 10% each. Together they accounted for more than half of the European total. Smaller markets with a share smaller than 10%, but still among the top-six leading importing countries, are the Netherlands (6.8%) and Poland (5.5%).

However, you should be aware different countries have different roles in the European market. 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 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 markets.

In terms of marketing, you need to understand that countries are not the markets per se. In HDHT, there are different market segments, ranging from low to high (also see the chapter on market entry for cushion covers). 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 cushion cover 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 European markets showed an annual growth in real private consumption expenditure of approximately 1%–3%. Forecasts for the coming year showed a continuation of this positive trend up until the COVID-19 pandemic. Now, the predictions are uncertain. Because the HDHT market responds to economic cycles, demand is expected to reflect any potential economic fluctuations.

Spain was the largest European importer in 2016

In 2016, Spain overtook Germany to become the leading European importer of textile furnishings. By 2019, the import value of these two countries have become virtually the same. After peaking in 2016, Spanish imports returned to a value of €162 million in 2019, comparable to 2015.

Spain sources more than 90% of its textile furnishings from developing countries, which is considerably above the European average. These imports reached a value of €149 million in 2019, the highest in Europe. Morocco is Spain's leading supplier by far, exporting €130 million in textile furnishings to Spain.

Whether Spain can sustain its demand for HDHT products largely depends on the effects of the COVID-19 pandemic. At the moment, [The Economist expects the Spanish economy to experience the deepest contraction in Europe and be among the least recovered European economies by the end of 2021](#), which would likely limit your opportunities in Spain for the coming years.

Germany is Europe's largest economy

After being overtaken by Spain in 2016, Germany has since retaken the leading spot among European importers of textile furnishings. This is mainly due to fluctuations in Spanish imports between 2015 and 2019, as German imports were relatively stable in this period at approximately €165 million.

Germany sources approximately 70% of its import value from developing countries. These imports increased from €110 million in 2015 to €113 million in 2019. This is the second-largest import value from developing countries among European countries, after Spain. With approximately €74 million, China is by far Germany's leading supplier of textile furnishings.

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 pandemic crisis](#). This expectation is based on both the country's healthy finances before the crisis and its large industrial sector, whose restart also benefits suppliers abroad.

In these uncertain circumstances, the combination of a strong market for developing countries and the country's forecasted economic recovery makes Germany one of the most interesting markets for you in Europe.

France's growth is slowing down

French imports of textile furnishings increased from €86 million in 2015 to €100 million in 2019, at an average annual rate of 4%. The imports from developing countries show a similar pattern, increasing from €50 million in 2015 to €62 million in 2019 at 5.7% per year on average. This adds up to a 62% share in 2019, which is approximately the average for Europe. France's leading suppliers are China (€25 million) and India (€20 million).

France's recent economic growth has slowed down after a gradual recovery. Global uncertainties and the effects of domestic social protests weighed on consumer confidence and the consumption of non-essential products. Adding the COVID-19 pandemic to these makes imports unlikely to increase in 2020.

Brexit may negatively impact the UK demand

British imports of textile furnishings were relatively stable at around €100 million between 2015 and 2019. The country sources around 79% of these imports from developing countries, equivalent to €79 million in 2019. Like in Germany, most UK imports come from China (€60 million in 2019).

[The United Kingdom's withdrawal from the European Union \(Brexit\)](#) may have a major impact on consumer confidence. The uncertainties related to Brexit, the COVID-19 pandemic and the resulting economic slowdown are expected to affect the consumption of HDHT products, including cushion covers. As such, your prospects for the next few years are modest. 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.

The Netherlands is an important European trade hub

With a relatively strong average annual growth of 5.5%, Dutch imports of textile furnishings increased from €53 million in 2015 to €66 million in 2019. This performance reflects a long period of consecutive economic growth for the Netherlands. Similarly, imports from developing countries increased from €37 million to €41 million, representing 62% of total imports in 2019. Of these, €28 million comes from China, making it the Netherlands' leading supplier of textile furnishings.

Brexit, the COVID-19 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 Dutch economy. Because the Netherlands heavily depends on international trade, negative developments in global trade strongly affect its economic performance, which in turn, affects cushion cover 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.

Poland is a quickly emerging import market

Although Poland is the smallest importer among the top-six, the country is catching up quickly. Poland's imports of textile furnishings grew from €39 million in 2015 to €53 million in 2019, at an impressive average annual growth rate of 7.8%. While the share of imports from developing countries is below average at 43%, they are growing at 13% per year, reaching €23 million in 2019.

Most Polish imports of textile furnishings came from China (30%) and Germany (24%). As Germany is an important European trade hub, this suggests that supplying to German traders may be a good way for you to reach the Polish market.

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.

3. Which trends offer opportunities on the European cushion cover market?

Cushion covers play a strong role in some of the major consumer trends that dominate the HDHT sector: sustainability and wellness. Other key trends are buyers' interest in co-creation and their need for smaller quantities and shorter lead times. For more information, see our study about [trends for home decoration and home textiles](#). We will outline each trend below, starting with the potential effects of the COVID-19 pandemic on the HDHT market.

The COVID-19 pandemic and the trends in HDHT and cushion covers

It is hard to predict what direction consumption will take in HDHT in the short and long terms. An expected outcome of the COVID-19 pandemic is that people may become more focused on the home, given the restrictions to social and public gatherings, which may become permanent.

Home decoration generally is not considered essential shopping and large parts of the retail in this industry have been forced to or decided to close due to reduced 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 and product groups could benefit:

- wellness and fitness (due to the pandemic restrictions)
- working from home
- cooking

Spending time at home, a direct imposition of the COVID-19 restrictions, has also moved consumers towards:

- re-appreciating their homes and the desire to make them 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 have been now accelerated. In addition, the pandemic has also demonstrated the fragile balance of the planet, demonstrating further the need to produce more sustainably, to use resources responsibly, and to care for people and the planet in general. This provides more opportunities for those companies that have integrated sustainability as part of their business model.

Tip:

For more information on the impact of the pandemic on consumer trends, see our study on [how to respond to COVID-19 in the HDHT sector](#).

Sustainability: natural materials

Consumers and designers are shifting their preferences towards more sustainable choices, especially in the mid-high to high-end market segments. There is an increasing concern and awareness of the negative impacts of production and consumption. This is driving the popularity of sustainability labels and commitments in the textile industry.

For cushion covers, using natural materials as your main raw material fits in well with this trend. This can include sustainable raw materials like organic cotton, wool, and silk, as well as relatively new fibres in this sector, like bamboo and hemp, or recycled materials. Natural dyes add an extra sustainable feature to your cushion covers.

Other ways to become more sustainable include environmentally and socially responsible production, as well as more efficient packing and transport. Certification, such as fair trade or organic, can also add value your product.

Tips:

Use sustainably produced and natural materials for your cushion covers, especially when you target the higher segments.

Invest in sustainable production, packaging, and transport methods.

Consider certification for your cushion covers, such as fair trade or organic.

Promote the sustainable aspects of your cushion covers as a premium.

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

Wellness: a natural look

One driver for some European consumers is the wish to improve their mental and physical health. The idea of connecting with nature, combined with busy city life, inspires designers to merge outdoor imagery with indoor

decoration. Flower and leaf patterns, green colours, and print combinations that relate to natural habitats are becoming increasingly popular. This trend fits particularly well with the previously discussed trend of using natural materials.

Tips:

Offer cushion covers with a natural look, using natural colours and patterns that resemble nature.

Use elegant materials and designs, especially when you target the high and middle-high ends of the market.

Traditional craftsmanship and design

Ethnic motifs and traditional craftsmanship are popular trends in the European market for cushion covers. Consumers are interested in the story behind the product, which adds to its uniqueness. Kilim cushion covers are a successful example of the influence of tradition. Handwoven and made of wool, these Turkish cushion covers are a unique product with a story.

Tips:

Promote your culture's traditional production methods and designs, adding a background story to your product. Make sure that it comes across clearly to the consumer, for example, by including a card describing the product's unique story.

Consider experimenting with your traditional designs, reinventing them in a more contemporary manner.

For example, see [Couleur Locale](#)'s collection of kilim cushion covers in various motifs and materials.

Range and concept development

More and more buyers, especially in the higher middle segment, are selling concepts rather than single products to their clients. They do this for marketing and positioning purposes, as well as to push their sales. To benefit from this trend, cushion covers can be sold as part of a wider range of similar products, including different materials and techniques. Combinations with bedspreads and throws are also a possibility.

Tips:

Develop a small range of cushion covers with a similar look and style, using different techniques and materials.

If you produce other decorative home textiles like bedspreads and throws, offer cushion covers that match with their designs.

Co-creation

European buyers are increasingly trying to distinguish themselves from their competitors. To do so, they focus on their own image and design. They look for producers they can cooperate with to develop their own products, through co-creation. This makes it extra important to showcase your special skills, production techniques, and the variety of raw materials you work with.

Tips:

Make sure your collection showcases the different materials and production techniques you have to offer.

Emphasise the story behind your product in your promotion strategy.

Smaller quantities and shorter lead times

European buyers change their collection at an increasing pace. 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 like you, since you are more flexible and can generally supply smaller quantities than bigger producers.

Tip:


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


[RASA Jaipur](#) from India is an example of a company that has successfully tapped into these trends. They specialise in handmade textiles working with local craftsmen and artisans using traditional crafts. The company makes it a point to work as sustainably as possible, for instance, by recycling all the water used in the production process. The way they compose their ranges shows a mix of different products and materials. A good example is their collection of cushion covers and bedlinen.


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

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