

What is the demand for home decoration and home textiles in the European market?

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The European market for home decoration and home textiles (HDHT) has improved after an import decrease in 2020 due to the COVID-19 pandemic. Many imports come directly from developing countries. Because European importers often distribute your products across the continent, you should focus on segments rather than specific countries. Opportunities are especially good in mid to high-end markets. If you can make your products stand out by adding unique value, there is potential across the sector.

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1. What makes Europe an interesting market for home decoration and home textiles?

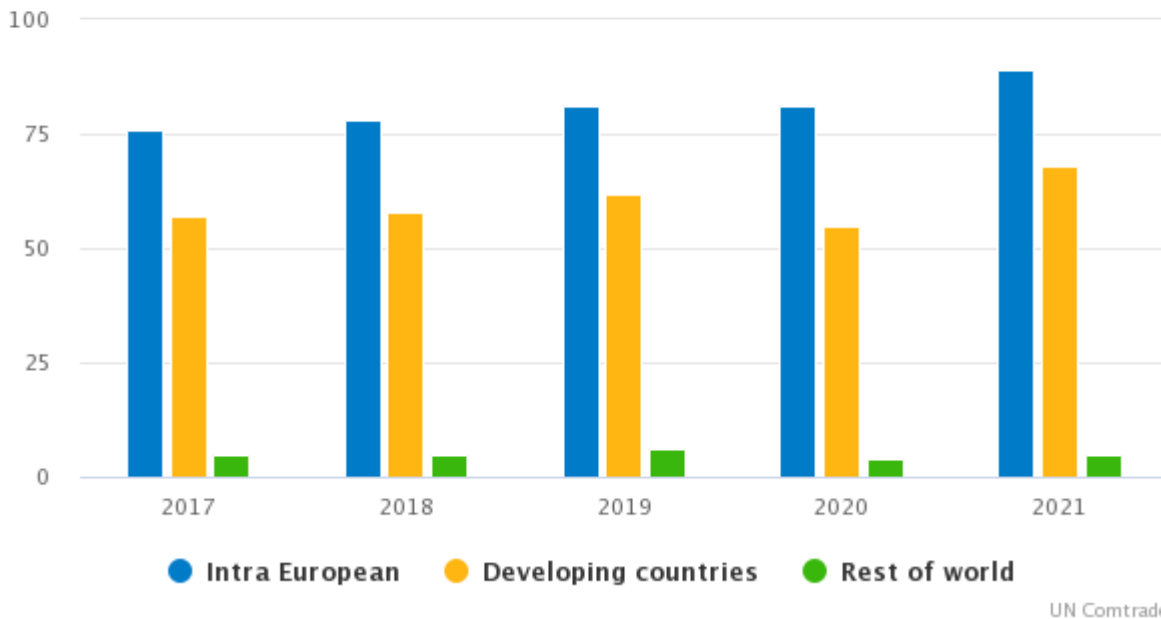
After a decrease in 2020 due to the COVID-19 pandemic, European HDHT imports grew strongly again in 2021. Consumers' renewed focus on the home and garden is expected to drive demand for HDHT in the coming years. At the same time, rising prices may make consumers less eager to spend. Developing countries play a key role in the European HDHT import market. While mass production from countries like China dominates the low-end market, mid to high-end markets offer good opportunities for you.

European imports went up again after the disruption of the pandemic

Marketing and services for the European HDHT market generally take place within Europe. However, a lot of production takes place in lower-cost countries outside of Europe.

Figure 1: European imports of HDHT products

in € billion



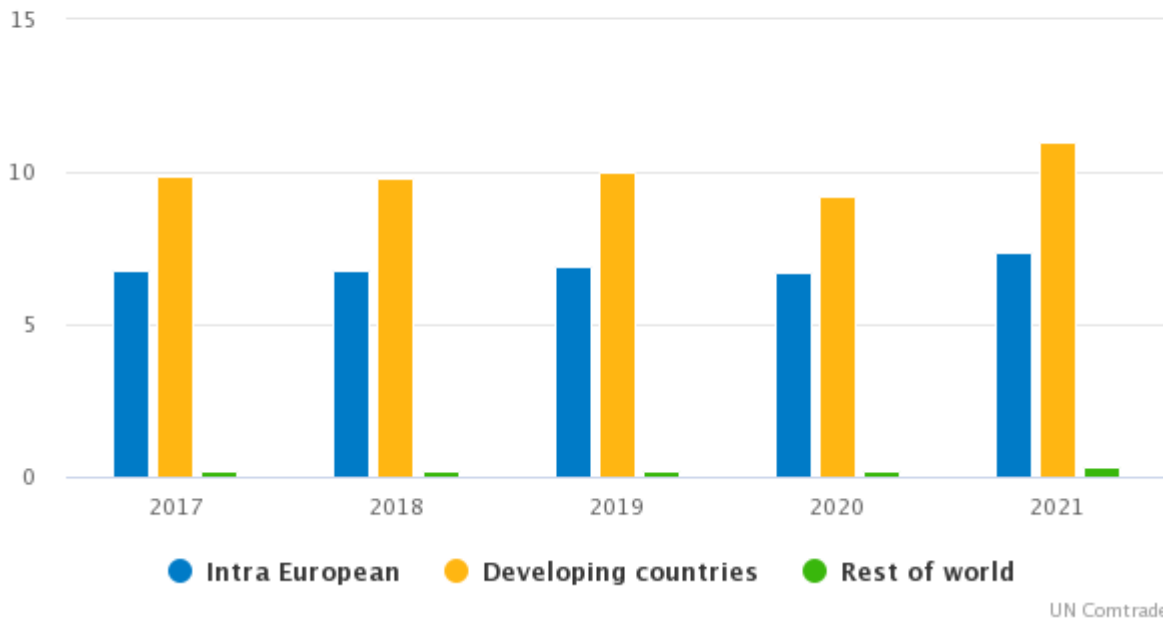
Between 2017 and 2021, European HDHT imports increased from €138 billion to €162 billion. The COVID-19 pandemic led to a -6.1% drop in 2020. In 2021, however, imports improved with 16% growth. This resulted in a total average yearly growth rate of 4.1% for 2017-2021. Of course, some imports in 2021 may have been delayed shipments from 2020. The global HDHT import market showed the same pattern. With a stable global market share of 38%, Europe is a key market for HDHT products.

Direct European HDHT imports from developing countries increased from €57 billion in 2017 to €68 billion in 2021. This added up to an average yearly growth rate of 4.5% and a direct import market share of 42%. Because much of the intra-European trade is made up of re-exported products from developing countries, the actual market share is probably much higher. This makes Europe an interesting market for you.

These data mainly reflect home decoration imports, which account for 88% of total European HDHT imports. However, a closer look at home textile imports shows a different pattern.

Figure 2: European imports of home textiles

in € billion



Most European home textile imports are directly sourced from developing countries. Of a total value of €19 billion in 2021, developing countries supplied €11 billion worth of home textiles. This adds up to an impressive direct European import market share of 59%.

The pandemic led to a bigger focus on the home and rising prices

Since 2020, the COVID-19 pandemic and the measures taken against it have affected international trade. At the same time, the lockdowns have increased consumer focus on the home and garden. For example, [65% of British homeowners invested in renovations](#) during the first lockdown, spending around €4,500 each on average. The importance of home and garden is generally expected to stay high and drive demand for HDHT in the coming years.

The Maison et Objet Barometer of June 2021 clearly reflected the different impacts of the pandemic. Although 8% of the brands, retailers and specifiers interviewed indicated their business was struggling, [more than a third of the respondents reported that the crisis allowed their company to grow](#).

Since then, however, global trade has been disrupted even more. In January/February 2022, [key HDHT stakeholders estimated their costs to be 19% higher](#) after the pandemic caused costs of raw materials, energy and transport to rise sharply. After that, costs rose further due to the war in Ukraine.

Figure 3: Impact of cost increases on HDHT companies, January-February 2022



Source: [Maison et Objet Barometer – Issue 3](#)

These longer-term cost increases are forcing HDHT companies to raise their prices. This also means that consumer prices are rising. Combined with the [low consumer confidence](#) due to the war in Ukraine, this makes consumers likely to not make large HDHT buys and/or choose more affordable options.

Example: the Netherlands

The June 2022 data for the Netherlands illustrate the effect of rising prices and low consumer confidence on HDHT demand. [Dutch consumer confidence reached an all-time low](#), and [consumer prices for furniture and home decoration increased by 13%](#) between June 2021 and June 2022. This was reflected in a [-7.7% drop in turnover for Dutch furniture and home furnishings retail](#) in the same period.

It should be noted, however, that HDHT sales were particularly high in the pandemic years of 2020 and 2021. Despite the drop, turnover in June 2022 was actually 13% (!) higher than in 2019.

Consumer spending and confidence are under pressure

An important indicator for the growth of demand for HDHT products is general consumer spending ('real private consumption expenditure'). The HDHT sector is sensitive to economic cycles. When economic circumstances and prospects are down, consumers avoid buying items that they do not urgently 'need'. When economic conditions are good, purchases of such non-essential products tend to rise.

Until the outbreak of COVID-19, the leading European markets showed a yearly growth in consumer spending of around 1-3%. Due to the pandemic, 2020 broke with this trend. In 2021, growth improved again, showing positive figures.

In December 2021 the forecasts for 2022 and 2023 were also positive, especially for 2022. However, as discussed, [in March 2022 European consumer confidence plummeted](#) due to the situation in Ukraine. This reflected a large drop in the expectations of households about the general economic situation in their country and their own future financial situation. Consumer intent to make major purchases also fell. This lower consumer confidence may well lead to lower spending on and lower demand for HDHT products.

Tips:

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

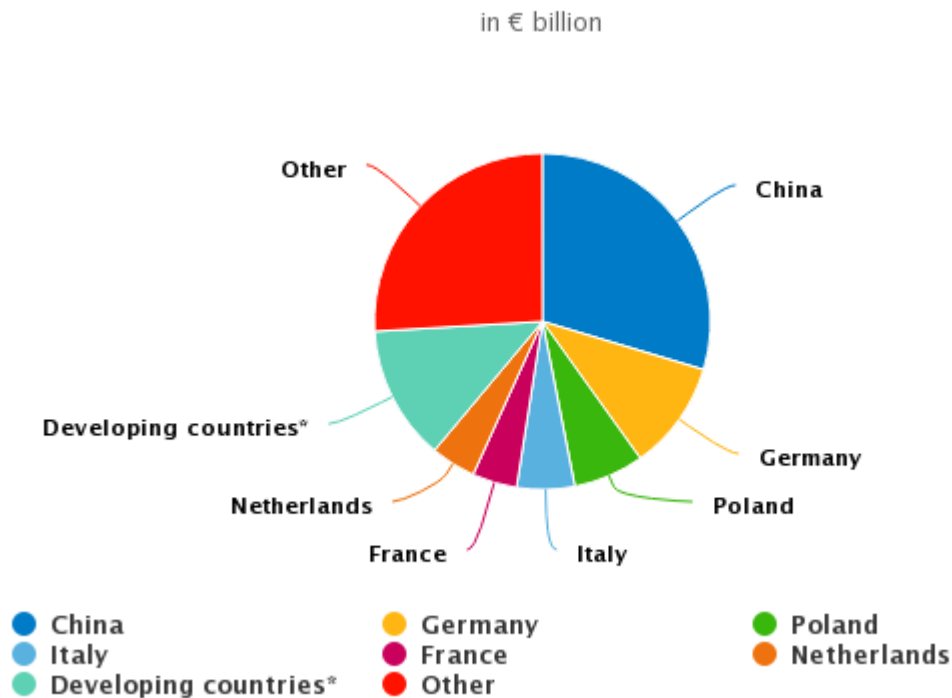
Check out [CBI News & Stories](#) for the latest news in the sector, including our article on how [increasing prices affect the HDHT market](#). To stay up to date, [subscribe to our newsletter](#).

For more insights into the effect of rising prices, see Ogilvy's ideas on [how brands can swim against the inflation stream](#).

See our study on [trends in the European HDHT market](#) for an overview and an analysis of their effect on demand.

China continues to be Europe's leading HDHT supplier

Figure 4: Leading suppliers of HDHT products to Europe



China

China is Europe's main HDHT supplier, good for 29% (€48 billion) of the total import value in 2021. This is more than the direct supplies of the other developing countries combined, which add up to an – also considerable – market share of 13% (€21 billion).

The other top six suppliers are all European countries, trading within Europe. Germany is the largest, with 11% of the 2021 HDHT imports, followed by Poland (7%), Italy (6%) and the Netherlands and France (4% each).

Countries' roles on the European market

You should be aware that European countries have different roles in the market. Some are mainly importers, and others are mainly manufacturers. Western European countries are mainly importers (and re-exporters). Most Western European importers do not just sell their products in their own country, they also distribute them across the continent.

European production mainly takes place in Eastern European countries. Mostly because they are nearby and have relatively low labour costs. This can make them a good alternative for sourcing low- to mid-end products. Western and Southern European countries also produce some high-end products from well-known premium brands with a long history.

Your focus should generally be on the mid to high-end market. Although [rising prices may cause more competition in the mid-end market](#), these segments offer you good opportunities in terms of value addition. This allows you to avoid competition from mass-producing low-cost countries in the lower end of the market, like

China.

Other developing countries are performing well

China's low-cost workforce, availability of (especially man-made) raw materials and efficient shipping to Europe compared to other Asian countries make it the most competitive supplier. In the coming years, however, Chinese producers may increasingly focus on their domestic market. Combined with problems following trade disputes and the COVID-19 pandemic, this may offer opportunities for China's competition.

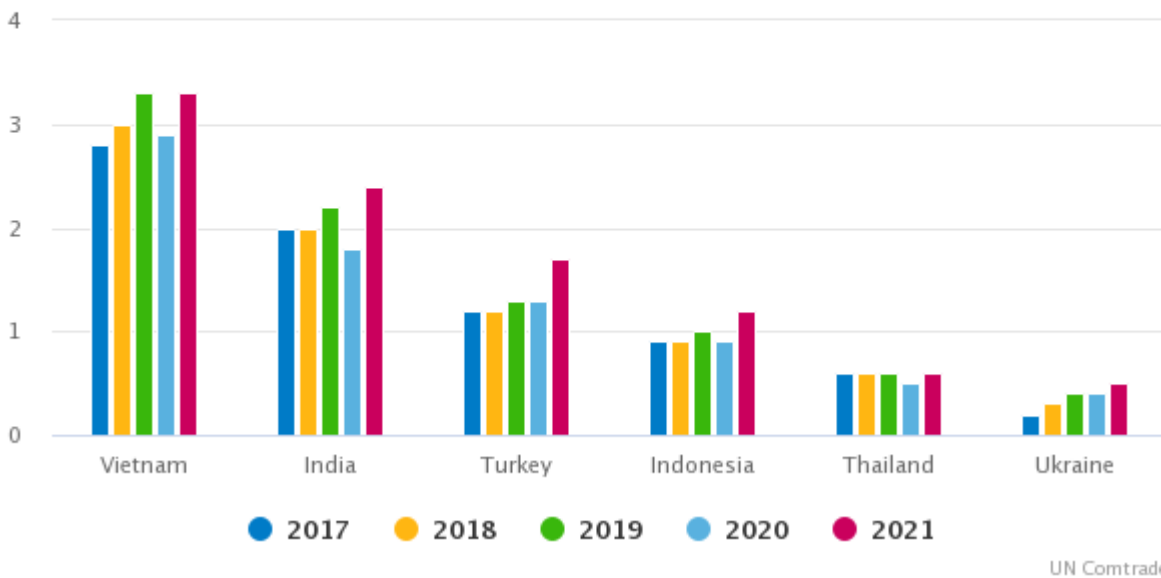
When it comes to total HDHT imports, Europe sourced €21 billion worth of products from developing countries (other than China) in 2021. Out of these countries, the six leading suppliers are:

1. India - €4.1 billion
2. Turkey - €3.5 billion
3. Vietnam - €3.4 billion
4. Pakistan - €2.4 billion
5. Indonesia - €1.2 billion
6. Bangladesh - €1.1 billion

Categorising these imports shows that China almost completely focuses on home decoration (92%). The supply from other developing countries is more balanced, with home decoration products accounting for 63% and home textiles for 37%. Individual countries clearly focus on different things.

Home decoration supplies from developing countries other than China

Figure 5: Selected leading suppliers of home decoration to Europe
in € billion



Vietnam is the largest of these suppliers, accounting for about a quarter of Europe's direct home decoration imports from "other" developing countries in 2021. The second largest supplier is India (19%), followed by Turkey (13%) and Indonesia (9%). All four of these countries have increased their supplies to Europe in recent years. Thailand and Ukraine accounted for about 4% each. While Thailand kept its supplies fairly stable between 2017 and 2021, Ukraine's home decoration exports to Europe grew substantially in this period.

Like China, Vietnam can produce large volumes at low costs. These producers generally have a good idea of

what is commercial and trendy. They effectively combine handmade and mechanised production. As such, they can be an effective (second-sourcing) alternative to China. Although there are of course exceptions, Vietnam mainly produces for the lower-end segments with limited design value. This should not be your focus.

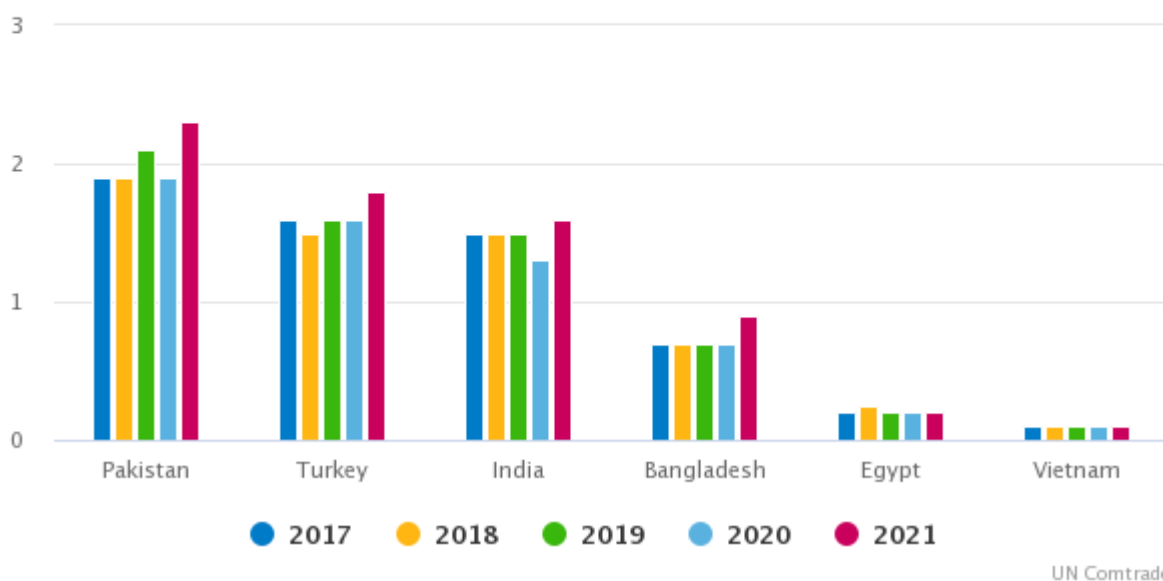
Manufacturers from India, Indonesia and Thailand are generally more direct competition for you. These producers often have access to a wide range of natural materials and skilled craftsmanship. This allows them to compete in the mid- to high-end parts of the European market. Each of these countries has their own offering and an established place in the market.

Turkish suppliers provide a mix of industrial and handmade production, at relatively low costs. They benefit from their closeness to Europe, which allows them to offer short delivery times. This position may have protected Turkish suppliers from some of the trade problems in 2020.

Although the HD category among developing countries is clearly dominated by South and Southeast Asia, Eastern Europe is on the rise. Like Turkey, these countries benefit from their location and affordable labour costs. Ukraine was one of the top six suppliers from “other” developing countries during the COVID-19 pandemic. Most of its supplies are furniture. [Ukrainian manufacturers have continued to produce furniture for export](#) since the Russian invasion, which they ship via Germany and Poland.

Home textile supplies from developing countries other than China

Figure 6: Selected leading suppliers of home textiles to Europe
in € billion



Pakistan, Turkey and India are key players on the home textiles market. Together, these countries directly accounted for nearly a third of Europe’s total imports of home textiles in 2021. Bangladesh supplied another 5%, with Egypt and Vietnam completing the top six. After European home textile imports struggled in 2020, all these countries achieved double-digit growth rates in 2021.

The leading suppliers in Pakistan and India are high-volume and low-pricing sourcing hubs for home textiles, with access to cheap labour. Pakistan is a leading cotton producer worldwide, with a large spinning capacity to produce textile products from this cotton. Vietnam also specialises in high-volume, low-cost production. Again, rather than competing with these countries on price, you should focus on the mid to high-end segments.

Bangladesh is more direct competition for you, with its reasonable prices, large skilled workforce and abundance of renewable natural materials. Egypt is famous for its high-quality Egyptian cotton, making the country a strong player in high-end cotton products. As in the home decoration category, Turkish manufacturers benefit from their closeness to Europe and relatively low-cost labour.

South and Southeast Asia dominate the supplies of home textiles to Europe – not just among developing countries but worldwide. Unlike in home decoration, Eastern European developing countries play a relatively minor role in home textiles. Cambodia, Tunisia and Sri Lanka are also fairly large home textile suppliers, but their exports to Europe decreased sharply in 2020. If they manage to bounce back in the coming years, they may make their way (back) into the top six. However, Cambodia and Sri Lanka supplies have not yet returned to pre-pandemic levels.

Tips:

Compare your products and your company with the competition. You can [use the ITC Trade Map to find exporters per country](#) to compare aspects like market segment, price, quality and target countries.

See our [studies per HDHT product group](#) to determine the competition for your specific products.

For more information on segments in HDHT, see our study on [market channels and segments](#).

2. Which European markets offer most opportunities for home decoration and home textiles?

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

Figure 7: European HDHT imports per country
in € billion



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Germany is the leading European importer of HDHT products with 18% of the market in 2021, followed by France (14%) and the United Kingdom (13%). Together, they account for almost half of the total European HDHT imports. Smaller markets with a share of less than 10% – but still in the top six importers – are the Netherlands

(9%), Italy (6%) and Spain (5%). All these markets performed well in 2021, but this may include delayed shipments carried over from 2020. Whether new patterns from 2021 are here to stay is not yet clear.

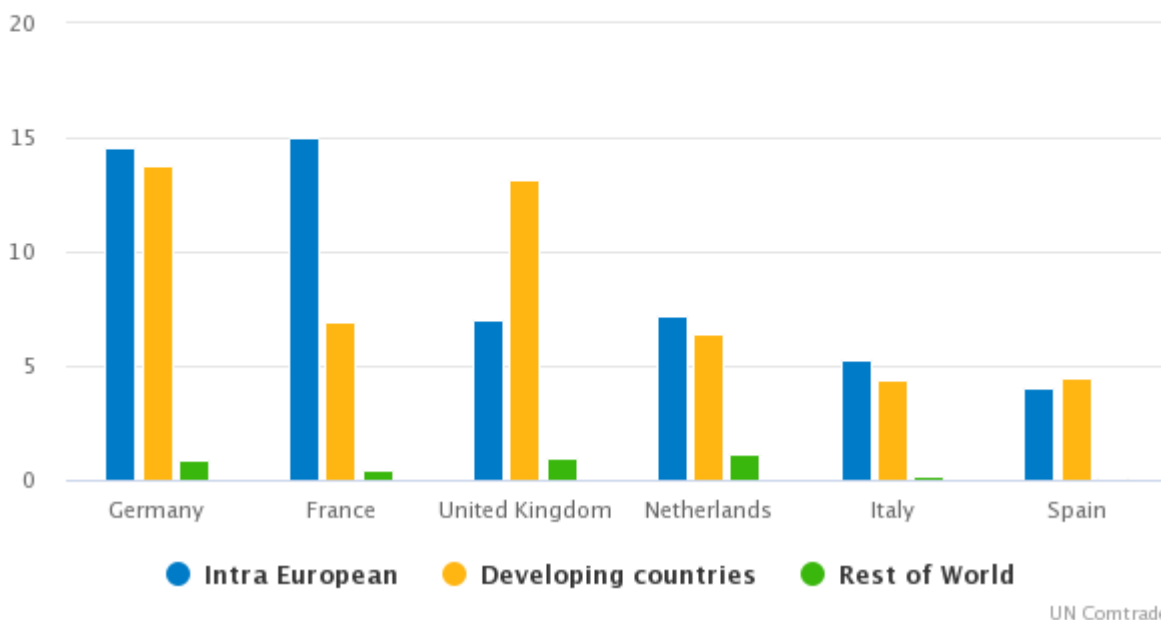
As discussed, most Western European importers re-export their imported products across Europe. This explains why in the HDHT market, small countries like the Netherlands often import much more than they consume.

Focus on segments

In terms of marketing, you need to know that countries are not markets. There are different market segments in HDHT, ranging from low to high (see our study on [market channels and segments](#)). Every European country has these segments, although their size may vary per country. Therefore, it makes much more sense for you to select a segment in your product group and connect to the importers and distributors in that segment, instead of in a specific country. These distributors will then sell in that segment across Europe.

Figure 8: Leading European importers of HDHT products

in € billion



Germany is Europe's largest importer

Between 2017 and 2021, German HDHT imports increased from €25 billion to €29 billion, at an average yearly rate of 4.4%. In 2020 they decreased by -0.7%, much less than the European average of -6.1%. Germany's role as a key trade hub in Europe may have helped the country maintain strong performance.

About 47% (€14 billion) of the 2021 imports came directly from developing countries, which is slightly above the European average. Germany's main suppliers from developing countries are China, Turkey, India, Vietnam and Pakistan, followed by Bangladesh and Indonesia.

In 2021, the total German HDHT import value consisted of €26 billion worth of home decoration products (87%) and €3.7 billion worth of home textiles (13%). While 44% of home decoration imports originated directly from developing countries, for home textiles this share was much larger, at 66%. This matches the European pattern. Interestingly, these market shares have gone up since 2017.

Germany is the largest economy in Europe, home to nearly a fifth of the population of the European Union. The European Commission projects that [German GDP will be back at pre-COVID-19 levels in the fourth quarter of](#)

2022. This is somewhat behind most other Northern and Western European countries, whose economies recovered in 2021.

As discussed above, Germany is an important European trade hub. In 2021, the country (re)exported around €17 billion worth of HDHT products to other European countries. Combined with a relatively large share of imports from developing countries, this makes Germany an interesting market for you.

France imports less from developing countries

French HDHT imports increased from €19 billion in 2017 to €22 billion in 2021. They fell by -8.5% in 2020 but improved strongly in 2021. This resulted in an average yearly growth rate of 4.5% between 2017 and 2021. It makes France the second-largest HDHT importer in Europe.

However, the direct market share for developing countries fell from 41% in 2017 to 31% in 2021. This is far below the European average. It seems France replaced some of its direct imports from developing countries with supplies from European countries in 2020/2021. China, India, Vietnam, Turkey and Pakistan are France's leading suppliers from developing countries. Opportunities for (nearby) French-speaking countries like Tunisia or Morocco are relatively good, as the shared language makes it easier for French importers to do business with them.

French imports generally comprise around 90% of home decoration products and 10% of home textiles. Again, the direct market share of developing countries was much higher for home textiles (52%) than for home decoration (29%) – but both are relatively low.

Economic growth in France had already slowed before falling to -8.3% in 2020 due to the pandemic. Global uncertainties and the effects of social unrest weighed on consumer confidence, decreasing the consumption of non-essential products. French GDP did return to its pre-pandemic level in 2021. However, considering the country appears to be shifting towards intra-European trade, your opportunities in France may be limited.

The United Kingdom mainly imports directly from developing countries

British HDHT imports have been hovering around €20 billion in recent years. They fell by -12% in 2020 before reaching €21 billion in 2021, and this resulted in a modest average growth of 2.2% per year. This is a considerably weaker performance than the European average of 4.1% yearly growth.

Until 2018, the United Kingdom was Europe's leading HDHT importer from developing countries. Its direct import market share for developing countries is still larger than in any other leading market: it grew from 57% in 2017 to 62% in 2021, amounting to €13 billion.

British imports comprised 86% of home decoration products (€18 billion) and 14% of home textiles (€3.1 billion). Developing countries were the main source for both, but at 70% their market share for home textile imports was particularly large. The United Kingdom's main suppliers from developing countries are China, India, Vietnam, Pakistan and Turkey, followed by Malaysia, Indonesia and Bangladesh.

[The United Kingdom leaving the European Union](#) (Brexit) has caused [relatively low levels of confidence in British consumers](#) since 2016. At the same time, Brexit can result in British buyers importing more directly from developing countries instead of from European importers. This allows buyers to avoid extra fees now that they are no longer part of the single market of the European Union. The decreased value of the British Pound since the Brexit referendum also makes direct trade more attractive. The growing market share seems to support this.

[British GDP decreased by -9.9% in 2020](#), a record decline. Like in most Northern and Western European countries, the [British economy returned to pre-pandemic levels in 2021](#). Taking into account this positive development and the potential increased interest in direct sourcing from developing countries, the United

Kingdom could well offer you opportunities.

The Netherlands is an important European trade hub

Although the Netherlands is a relatively small country, it is Europe's fourth-largest HDHT importer. This is because the country is also a key trade hub, re-exporting imports across Europe. Like its fellow trade hub, Germany, the Netherlands kept its imports fairly stable in 2020. Between 2017 and 2021, Dutch HDHT imports surged. They increased from €10 billion to €15 billion, at an impressive average rate of 9.0% per year. This is by far the highest among the leading importers. About 44% (€6.4 billion) of these imports came straight from developing countries.

In 2021, Dutch HDHT imports comprised 90% of home decoration products (€13 billion) and 10% of home textiles (€1.5 billion). The direct developing country share was 43% for home decoration and 53% for home textiles. This matches the general European pattern. China, India and Vietnam are the Netherlands' main suppliers from developing countries, followed by Pakistan, Turkey and Indonesia.

As in other Western European markets, Dutch GDP was back at 2019 levels in 2021. Brexit and various international trade disputes may have a big impact on the Netherlands, since the country heavily depends on international trade. Because developments in other European countries play a key role, Dutch imports are difficult to predict. However, its strong performance as a European trade hub continues to make the Netherlands an interesting market for you.

Italy's economy is recovering slowly

In recent years, Italian HDHT imports have been hovering around €10 billion. In 2020 they dropped by -15% (!) before returning to €10 billion in 2021. This resulted in a modest average yearly growth of 2.4% for 2017-2021. Of these imports, 44% (€4.4 billion) was sourced directly from developing countries. This proportion is comparable to the European average.

In 2021, the total Italian HDHT import value consisted of €8.7 billion worth of home decoration products (88%) and €1.2 billion (12%) worth of home textiles. The direct developing country import share for home decoration was 41% on average. With 72%, the share for home textiles was high. Italy's leading suppliers from developing countries are China, India and Turkey, followed by Pakistan and Vietnam.

Being particularly affected by the pandemic, Italy experienced a GDP decline of -8.8% in 2020. The Italian economy is still slow to recover, with [Italian GDP now projected to reach its 2019-level in the fourth quarter of 2022](#). Because of this, opportunities on the Italian market may be limited in the coming years.

Spain is also faced with economic struggles

Spain generally imports about €8 billion worth of HDHT imports. They dropped by -17% (!) in 2020 but recovered in 2021. This resulted in an average yearly growth of 2.4% between 2017 and 2021. This is comparable to the British and Italian performances. More than 50% of Spanish HDHT imports came directly from developing countries, which is well above the European average of 42%.

Home decoration made up 87% (€7.5 billion) of Spanish HDHT imports, and home textiles 13% (€1.1 billion). The direct developing country share was especially large for home textiles. At 74%, this was the highest of all leading importers. China, India, Pakistan and Vietnam are Spain's main suppliers from developing countries, followed by Turkey and Bangladesh.

The Economist predicted that [the Spanish economy experienced the deepest contraction in Europe](#) with a decrease in GDP of -11% in 2020. [A return to pre-pandemic levels is expected in the third quarter of 2023](#), making the Spanish economy the slowest to recover in Europe. This, of course, could limit your opportunities in Spain for the coming years. However, the country's relatively large market for developing countries is promising.

Tips:

Do not focus only on specific European countries. A particular market segment (high, middle or low) tends to behave similarly across countries, whether they are major importers or emerging markets. Your best approach is to identify the appropriate segment for your products and let your buyers distribute your products across Europe within this segment.

Use European HDHT trade associations to find trading partners. Key associations include [EURATEX](#) (textiles) and [EFIC](#) (furniture). National associations such as [HWB](#) (Germany), the [Giftware Association](#) (United Kingdom) and [VIA](#) (the Netherlands) can also be useful.

Visit (online) European trade fairs to find trading partners. The most important European HDHT trade fairs are [Ambiente](#) and [Heimtextil](#) (home textiles) in Germany and [Maison et Objet](#) in France. Other interesting events in the key markets include the [Autumn Fair](#) and [Spring Fair](#) in the United Kingdom, [showUP](#) in the Netherlands, [spoga+gafa](#) (garden) in Germany, [Salone del Mobile](#) in Italy and [Intergift](#) in Spain. When international travel was restricted, many of these fairs organised online/hybrid events.

See our [studies per HDHT product group](#) for more specific trade statistics for your products.

3. Which products from developing countries have the most potential on the European market?

Opportunities are generally good on the European HDHT market. Particularly promising product groups include basketry, home furniture, homewear, wooden tableware and kitchenware, carrying products (bags) and soap. These groups show good potential based on trade statistics and sector trends.

The HDHT sector is large and very diverse, even within the individual home decoration and home textile sub-sectors. These sub-sectors are divided into even more [categories, consisting of various product groups](#). Analysing these product groups can give you a broad idea of the most promising products for the European market. However, you should keep in mind that the true potential of a product also depends on factors such as its quality, price, style and design, which also determine the best target segment for the product.

The European HDHT market generally offers you good opportunities, especially in the mid to high-end segments. To appeal to consumers in these segments, your product needs to stand out. You should use design, decoration, craftsmanship and the story behind your products to differentiate from your competition. Using special (sustainable) materials, techniques and patterns are good ways to add value. If you support this with an active sales strategy, you can be successful.

This chapter highlights six promising product groups from across the sector to give you an idea of the potential on the European market. Please note that we base our results on high-potential product data from the [developing countries where CBI is active](#). Of course, there are many other opportunities not limited to these product groups.

Basketry

A particularly well-performing product group is basketry. European basketry imports increased from €495 million in 2017 to €798 million in 2021, at an average yearly rate of 13%. This includes a growth of 2.5% in 2020, despite global trade problems.

China is Europe's leading supplier of basketry, with a 45% import market share. Its supplies went up from €261 million in 2017 to €372 million in 2021, after a decrease in 2020. This means an average yearly growth of 8.5%. At the same time, European basketry imports from other developing countries such as Vietnam, Indonesia and Bangladesh rose sharply by a combined 16% (!) per year on average. In 2021 they reached €286 million, which adds up to a direct market share of 36%.

In addition to having decorative value, baskets are functional storage items. They help consumers create both physical space and, as a result, mental space. This type of 'decluttering' caters to the long-term sector trends of [shared living](#) and [wellness](#). The pandemic has boosted these trends, as restrictions forced people to spend more time together at home. This suggests good prospects for basketry in the short and long term.

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Figure 9: European imports of basketry by plaiting material

in € million

UN Comtrade

Basketry also fits in well with the growing importance of [sustainability](#). About 86% of the basketry that Europe imports is made of natural materials. 12% of this is bamboo, 17% rattan and 71% "other" natural materials such as sea grass, jute, water hyacinth or abaca. However, the use of natural materials does not automatically make a product sustainable. Raw materials must come from responsibly managed, renewable sources. Paints and dyes should preferably be natural.

Figure 10: [Guanabana - Handmade baskets of iraca palm](#)

Source: [Guanabana @ Instagram](#)

Home furniture

A much broader, larger product group than basketry is home furniture. This group includes items such as various types of chairs, tables, beds, stools and sofas. European imports increased from €32 billion in 2017 to €43 billion in 2021, with 7.7% per year on average. During the trade problems of 2020, they were fairly stable.

Although China supplied €13 billion worth of furniture in 2021, an additional €4.8 billion was sourced directly from other developing countries such as Vietnam and Indonesia. Chinese furniture supplies performed particularly well in 2021 - possibly to catch up on delayed shipments from 2020.

Figure 11: European imports of furniture by material

in € billion

UN Comtrade

Europe mainly imports wooden furniture (63%), including upholstered pieces with wooden frames. Other natural materials such as rattan and bamboo are also becoming increasingly popular, although this is a much smaller category within furniture. Indonesia is a particularly strong player in rattan.

Flexible furniture has especially good potential, based on trends of [shared living](#) and smaller living spaces. Pieces that are easy to move and/or modular (with individual components) let consumers rearrange their furniture according to their current needs. Items that can be collapsed and/or can easily be stored offer extra space and flexibility. The COVID-19 pandemic has made these properties even more important. It has also caused increased interest in comfortable furniture and (flexible) home office solutions for remote work.

Figure 12: [Liviza - Flexible handmade wooden furniture](#)

Source: [Liviza @ Instagram](#)

Homewear

Homewear has a special place in home textiles. This product group is made up of sleepwear and bathrobes, which are products that you wear rather than use (decoratively) around the house. European homewear imports went up from €2.9 billion in 2017 to €3.5 billion in 2021, at an average yearly rate of 5.3%. Because they fell by -7.9% in 2020, imports in 2021 may include some delayed shipments carried over from 2020.

China is Europe's leading individual homewear supplier with a 24% import share. However, developing countries that specialise in textiles – such as Bangladesh (14%) – play a much larger role in this product group. Together, they directly supplied €1.7 billion worth of homewear, which is 47% of the import market. These countries achieved an average yearly growth of 5.7% between 2017 and 2021, compared to 3.3% for China. Countries such as Bangladesh and Indonesia even managed to increase their supplies in 2020, despite the pandemic.

Although there is a lot of mass production in the home textiles sector from countries such as India, there are opportunities for smaller-scale producers who pay more attention to detail. Cotton is the most common material (58% of European imports in 2021) – in various styles, such as terry or flannel. Synthetic fibres follow with 33%. More luxurious fabrics, such as silk and cashmere, are also popular. In addition, there is an increasing interest in

more [sustainable](#) options such as organic cotton and bamboo fibres. Blends of different (natural) fibres are also possible.

In addition to being functional, homewear also plays a role in the [wellness](#) trend. Because a good night of sleep is vital for a person's sense of well-being, comfortable sleepwear is important. A luxurious, soft bathrobe adds to the relaxing spa experience that many consumers are recreating at home. Simple and affordable products that help consumers relax and improve their well-being at home can make a big difference. As a continuing consumer trend, wellness is expected to continue driving demand in the long term.

Figure 13: [Yawn - GOTS, OEKO-TEX and SA8000 certified homewear](#)

Source: [Yawn @ YouTube](#)

Wooden tableware and kitchenware

A relatively small but successful product group is that of wooden tableware and kitchenware. European imports of these products went up from €431 million in 2017 to €763 million in 2021. This means an average growth of 15% per year, the highest rate of any HDHT product group. During trade problems in 2020, they kept growing with 5.3%.

China supplied €404 million worth of wooden tableware and kitchenware in 2021, making it Europe's leading supplier. Imports from other developing countries such as India and Vietnam reached a combined €95 million – a direct market share of 12%.

Wooden tableware and kitchenware is becoming a popular alternative to products made from unsustainable materials such as 'virgin' plastics. Bamboo is a popular material. It is often used to replace single-use plastic plates, forks, knives, spoons and straws now that these products are [banned from the European market](#). Because it grows fast and is a naturally renewable resource, bamboo is considered a good sustainable option. For true sustainability, however, any type of wood or bamboo must be farmed and processed responsibly.

Tableware and kitchenware play an important role in the "[home sweet home](#)" trend, where friends and family

enjoy cooking and dining together. To create the perfect 'slow dining' experience, they invest in quality cookware and dining ware. Many European consumers have become (more) interested in cooking during the COVID-19 lockdowns. This could further increase the demand for wooden tableware and kitchenware, and heighten the importance of [sustainability](#), which drives long-term demand.

Figure 14: [Nkuku - Handmade mango wooden boards](#)

Source: [Nkuku @ Instagram](#)

Bags

Carrying products, or bags, are another large product group with good potential. Shopping bags, travel bags and office and school bags all fall within this product group. Within HDHT, bags are mainly functional. More fashion-focussed personal accessories belong to Personal Accessories or Fashion, not HDHT.

In 2020, the COVID-19 pandemic restricted travel and forced people to stay home, where they did not need bags to carry items. This caused a sharp decrease in imports. In 2021 imports improved to €19 billion, which is near 2017 levels. The demand for bags is set to increase more now that restrictions are lifted. As people start travelling, commuting, playing sports and doing their own shopping again, they need bags to carry their belongings. A recent GlobeScan survey showed that [most consumers use their own bag for shopping](#).

The leading bag supplier in Europe, China, accounts for about 30% of imports. Its supplies decreased from €7.1 billion in 2017 to €5.6 billion in 2021, at an average yearly rate of -5.7%. At the same time, combined supplies from other developing countries decreased by just -0.7% per year on average. They reached €2.6 billion in 2021, which is a direct import market share of 14%. Countries such as Indonesia, Cambodia and Myanmar performed particularly well. Myanmar achieved an average growth of 51% (!) per year, making it Europe's sixteenth-largest supplier.

The largest category in this product group includes textile travel bags, rucksacks and shopping bags. Such textile items are a good alternative to plastic bags that you throw away, which are used less and less in Europe due to restrictions set by the [Plastic Bags Directive](#). The growing demand for [sustainability](#) is also expected to increase long-term interest in bags made of materials such as jute, sea grass, mela leaf, catkin, or recycled materials. This offers opportunities for countries that are rich in these types of resources, like Bangladesh.

Figure 15: [WSDO - WFTO Fair Trade Guaranteed handmade bag](#)

Source: [WSDO @ Instagram](#)

Soap

European soap imports peaked in 2020, benefiting from the focus on hygiene due to the COVID-19 pandemic. Overall, they grew from €1.7 billion in 2017 to €2.1 billion in 2021, at an average rate of 5.0% per year.

China plays a relatively modest role in this market, with a 4.5% share in 2021. With strong competition from European manufacturers, other developing countries had a combined direct market share of 11% (€223 million). Of these countries, Turkey is a particularly strong player. Indonesia also performs well, with an above-average growth rate of 5.8% per year.

The greater focus on hygiene mainly drives the demand for soap dispensers. The more luxurious 'raw' and chunky soap bars that are popular in HDHT are connected to long-term and deep-seated consumer needs. They play an important role in the [wellness](#) trend. In this trend, consumers create a spa atmosphere at home, with longer and more elaborate bathing to boost their mental and physical well-being. Natural and 'exotic' ingredients, decoration and sustainable packaging are common. They make soap an ideal gift to treat yourself or friends and family.

Figure 16: [Eco-Company - Vegan and organic handmade soap bars](#)

Source: [Eco-Company - Instagram](#)

Tips:

See our [studies per HDHT product group](#) for an analysis of the potential of your specific products. These include studies on products such as [basketry](#), [occasional furniture](#) and [homewear](#).

See our study on the [trends on the European HDHT market](#) for an overview and an in-depth analysis of their effect on demand.

For more information on the European ban on single-use plastics and other legislation, see our study on the [requirements you should comply with on the European HDHT market](#).

Keep in mind that for most product groups, potential is highest in the mid to high-end market segments. Avoid having to compete on price at the lower ends of the market unless you specialise in low-cost/high-volume production. For more information, see our study on [market channels and segments in HDHT](#).

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

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