

The European market potential for garden furniture

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The European market for garden furniture is driven by an increased focus on the garden, and the disappearing barrier between indoor and outdoor living spaces. This includes furniture for smaller urban outdoor spaces. The sector trends of wellness and playfulness also influence this market, as consumers relax, play and connect with nature in the garden. Sustainability plays an increasingly important role in garden furniture, offering opportunities for renewable materials such as bamboo and rattan.

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1. Product description

In Home Decoration and Home Textiles (HDHT), garden furniture belongs to the garden category. Garden furniture is a wide product group, which includes:

- garden seats
- tables of varying sizes
- sofas, benches and day beds
- swing seats
- deck chairs and sun loungers
- poufs and beanbags
- stools

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

Table 1: Product codes for garden furniture*

Harmonised System (HS)	Prodcom	Description
9401 52	31 00 12 30	Seats of bamboo
9401 53	Seats of rattan	
9401 59	Seats of cane, osier or similar materials	

9403 82	Furniture of bamboo (excluding seats and medical, surgical, dental or veterinary furniture)
9403 83	Furniture of rattan (excluding seats and medical, surgical, dental or veterinary furniture)
9403 89	Furniture of cane, osier or similar materials (excluding seats and medical, surgical, dental or veterinary furniture)

* Because no specific product codes are available for garden furniture, these codes cover bamboo and rattan furniture as an example.

Functionality

For the consumer, the garden is a place to relax and sunbathe as well as 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 are dining tables with chairs, and sets with a couch, sofas and table.

Passive seating is:

- lightweight
- easy to move around with the sun
- usually sold individually

Examples are lazy chairs, loungers and deckchairs.

Because Europeans are relatively tall, their furniture should be relatively high. For instance, seating furniture ranges from 30 cm to 45-50 cm in height. Tables are much higher, usually around 75 cm. You also need to consider standard cushion sizes. For normal chairs, cushions are about 46x48 cm. For lounge chairs and sofas, they are 60x60 cm or 70x70 cm. Ask your buyers what they need.

Material

Garden furniture can be made of various raw materials, including wood (such as teak or oak), other natural materials such as rattan, bamboo and cane, metal, fabrics, or synthetic materials. The items can be upholstered with fabric or come with cushions.

The quality of the raw materials and finishing of the product are important. Convenience is a key need for consumers buying garden furniture. They like low-maintenance, easy-to-clean, weatherproof 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 conditions, from 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 in terms of new materials and design is increasingly important. However, the furniture still needs to be comfortable and durable.

2. What makes Europe an interesting market for garden furniture?

The European market for bamboo and rattan furniture is growing, stimulated by a rising demand for environmentally friendly (outdoor) furniture. About two thirds of the import value is sourced directly from developing countries, making Europe an interesting market for you. The increased focus on the garden and the disappearing barrier between the indoors and outdoors drive the general European market for garden furniture.

(!) Because no specific trade data are available for garden furniture, these statistics cover bamboo and rattan furniture as an example.

Between 2016 and 2020, European imports of bamboo and rattan furniture increased from €142 million to €168 million, at an average annual rate of 4.2%. Nearly 60% of this was bamboo. Although the [outbreak of the coronavirus](#) (COVID-19) and the measures taken against it worldwide continue to affect international trade, these imports increased by 8.5% in 2020. This could be explained by the fact that lockdowns have resulted in an increased focus on the home and garden, and a need for comfortable (outdoor) furniture.

Europe sources about two thirds of its bamboo and rattan furniture import value directly from developing countries. These imports were fairly stable in 2020, resulting in an average annual growth of 1.4% between 2016 and 2020. This makes Europe an interesting market for you, as an exporter from a developing country.

The rising demand for environmentally friendly outdoor furniture is a key trend that stimulates the market for bamboo and rattan furniture. Market growth for garden furniture specifically is driven by the disappearing barrier between the home and garden, making outdoor spaces an extension of the home in purpose and style. For more drivers of demand, see 'which trends offer opportunities?' below.

Tip:

- For more information on the short and long-term impact of COVID-19 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 garden furniture?

The larger Western-European economies are the main importers of garden furniture. 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.

In 2020, Germany remained Europe's leading importer of bamboo and rattan furniture with 22% of imports. France followed with 13%. Together, these countries accounted for nearly half of the European total, with 11%

each. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are the United Kingdom (8.8%), the Netherlands (7.1%), Belgium (5.8%) and Spain (5.7%).

Be aware that European countries have different roles on the market. You can make a rough distinction between countries that are mainly importers and countries that are mainly manufacturers. Western-European countries are mainly importers and re-exporters. Most Western-European importers do not just sell their imported products in their own country, but they distribute them across Europe. This explains why in HDHT, small countries like Belgium and the Netherlands often import much more than the demand in their own domestic market.

In terms of marketing, you need to know 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 garden furniture](#)). 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.

There are [36 million people aged over 14 in Germany who \(se households\) own a garden](#). An estimated [60% of the French have a garden](#), which adds up to around 40 million people. [Eight in ten British adults have access to a private garden](#), which also amounts to roughly 40 million people. In addition, several millions of consumers have their own balcony or patio space.

Real private consumption expenditure

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

Until the COVID-19 outbreak, the leading European markets showed an annual growth in real private consumption expenditure of around 1-3%. Due to the pandemic, 2020 broke with this trend. However, because lockdowns increased consumers' focus on their home, the effect on the HDHT sector may have been limited. For the coming years, growth is expected to bounce back to positive figures.

Germany continues to be the largest European importer

Germany is the largest economy in Europe, home to nearly a fifth of the European Union's population. It is widely considered the stabilising force within the European Union. The *Economist* forecast [Germany to be the first major European economy to recover from the current crisis](#). This was based on both the country's healthy finances before the crisis and its large industrial sector, the reboot of which also benefits suppliers abroad. The European Commission indeed projects [German GDP to be back at pre-COVID-19 levels in 2021](#).

Between 2016 and 2020, German bamboo and rattan furniture imports increased from €34 million to €36 million. This added up to an average annual growth rate of 1.4%. After a relatively modest performance in 2018, imports grew by 15% in 2019 and 12% in 2020, despite the global pandemic. About three quarters of German imports were bamboo.

Germany sources about two thirds of its import value directly from developing countries, which is comparable to the European average. China and the Netherlands are Germany's leading bamboo and rattan furniture suppliers (mainly bamboo), with 43% and 23% of imports respectively. Indonesia supplies another 11%, mainly rattan.

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

France's economy is set to recover in 2022

French bamboo and rattan furniture imports increased from €16 million in 2016 to €22 million in 2020, at an average annual rate of 8.0%. This includes a 7.8% increase in 2020 despite the COVID-19 pandemic. In 2020, these imports were 50% bamboo and 50% rattan.

France's direct imports from developing countries steadily grew between 2016 and 2020, driving the market share up to about the European average of two thirds. China and Indonesia are the country's leading suppliers, with 28% and 27% of imports respectively. While China mainly supplies bamboo furniture, Indonesia specialises in rattan.

Economic growth in France had already slowed down before plummeting by -8.3% in 2020 due to the pandemic. Global uncertainties and the effects of social unrest weighed on consumer confidence and the consumption of non-essential products. However, [French GDP is expected return to its pre-pandemic level at the beginning of 2022](#). This indicates France could offer you opportunities, particularly if you speak the language.

The United Kingdom mainly imports directly from developing countries

British bamboo and rattan furniture imports decreased from €22 million in 2016 to €15 million in 2020, at an average annual rate of -9.6%. After an impressive recovery in 2019, imports decreased again in 2020, by -8.0%. Most (about 60%) of these imports were rattan.

About 71% of British bamboo and rattan furniture imports came directly from developing countries, which is slightly above the European average. China and Indonesia are the main suppliers, with 48% and 18% of imports respectively.

[The United Kingdom's withdrawal from the European Union](#) (Brexit) has led to [relatively low consumer confidence levels](#) since 2016. At the same time, Brexit may result in British buyers importing more directly from developing countries, rather than from European importers. This allows them to avoid additional fees now that they are no longer part of the European Union's single market. The decreased value of the British pound since the Brexit referendum also makes direct trade more attractive.

[British GDP decreased by -9.9% in 2020](#), a record decline. At the start of 2021, a *Financial Times* survey among leading economists projected the [British economy to be one of the last high-income economies to recover](#). Since then, however, the Bank of England governor Andrew Bailey has indicated he expects the economy to be [back to pre-COVID levels by the end of 2021](#). Considering this positive development and the potential increased interest in direct sourcing from developing countries, the United Kingdom could well offer you good opportunities.

The Netherlands is an important European trade hub

Between 2016 and 2020, Dutch bamboo and rattan furniture imports increased from €11 million to €12 million. This translates to an average growth of 1.4% per year. After a decrease in 2019, imports grew by an impressive 29% in 2020, despite the global pandemic. About 56% of Dutch imports were bamboo, and 44% rattan.

70% of imports came directly from developing countries, which is slightly above average. China and Indonesia are the Netherlands' leading suppliers, with import market shares of 29% and 25% respectively. Imports from China were 93% bamboo, while 98% of Indonesian supplies were rattan.

Like in Germany, [Dutch GDP is projected to return to 2019 levels in 2021](#). As well as the COVID-19 pandemic, Brexit and international trade disputes between the United States and China (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, affects consumption of garden furniture.

Because developments in other European countries will also play a role, total Dutch imports are difficult to predict. However, its strong performance as a European trade hub with a considerable import share for developing countries continues to make the Netherlands an interesting market for you.

Belgium increases its imports from developing countries

After strong growth in 2019 and 2020 Belgium became Europe's 5th-largest importer of bamboo and rattan furniture. Imports increased from €6.9 million in 2016 to €10 million in 2020, at an average annual rate of 9.3%. This was due to a strong increase in direct imports from developing countries, which grew at an average rate of 12% to reach €7.2 million in 2020. This added up to an above-average market share of 74%. About two thirds of Belgian imports were rattan.

Belgium's leading suppliers are Indonesia and China, with 44% and 29% of the imports respectively. While Indonesia specialises in rattan, China mainly supplies bamboo furniture.

After a historic decline of -6.3% in 2020, [Belgian GDP is expected to reach its pre-pandemic level in the first half of 2022](#). Like the Netherlands, Belgium is an important trading hub in Europe. This means that again, given the economic struggles in Europe as a whole, total Belgian imports in the coming years are difficult to predict.

Spain keeps its imports stable despite economic struggles

Despite being hit hard by the COVID-19 pandemic, Spain managed to keep its imports of bamboo and rattan furniture stable at about €10 million. In 2020, these imports were 50% bamboo and 50% rattan. 77% of this came directly from developing countries, which is the largest market share among the leading importers.

China and Indonesia are Spain's leading suppliers, with import market shares of about a third each. Imports from China were 82% bamboo, while 98% of Indonesian supplies were rattan.

As the *Economist* predicted, [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 by the end of 2022](#), which is considerably later than the European average. This, of course, could limit your opportunities in Spain for 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. What trends offer opportunities on the European garden furniture market?

The market for garden furniture is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. The main developments are outlined below, starting with the potential effects of the COVID-19 pandemic on the HDHT market.

COVID-19 and trends in HDHT and garden furniture

An expected outcome of the COVID-19 pandemic is that people will be more focused on the home and garden, having been in lockdown. A major factor in consumer spending will be the disposable income consumers may or may not have after the pandemic. The worry about this is expressed by consumer confidence, which continues to be relatively low. This makes consumers careful in spending beyond food, cleaning products, and other

household essentials.

However, some areas/product groups could benefit:

- wellness / fitness at home
- (outdoor) cooking
- working from home

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

- re-appreciating their homes and gardens and wishing to make them 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 have been accelerated as a direct consequence of COVID-19 and subsequent lockdowns. In addition, the pandemic has demonstrated the fragile balance on this planet, highlighting the need to produce more sustainably, taking care of our resources, our people and the planet in general. These developments further emphasise the existing trends of both sustainability and wellness in the garden furniture market.

Home sweet ... garden

“Home sweet home” is a trend in which the (slightly older, [baby boomer](#)) consumer retreats into the safety and security of their own home, and makes that a perfect, luxurious oasis. Home is also the place where genuine connection takes place with friends and family by eating, cooking and enjoying entertainment together. These two aspects have been strengthened by the COVID-19 pandemic, which has increased consumers’ focus on their home and garden.

Sparked by this trend, the garden has become an extension of the home. The lines between the indoor and outdoor areas of the home are blurring, so it looks as if the garden is also part of the living room, often decorated in line with the style inside. This trend of blending indoor and outdoor styles, represents a much broader segment, ranging from mid-mid upwards. Here, the typical mid-market styles (such as romantic, “contemporary”, colonial, nostalgic, Scandi) are extended to the garden furniture.

Garden furniture for relaxing with friends and family typically comes in complete sets, such as a couch and easy chair arrangement with a low table. At the upper end of the market, brands are important as status symbols. Shapes are mostly conservative, often minimalist, with a limited colour palette.

Trendy furniture is a sub-segment of its own that responds to the cyclical influence of certain interior trends, which are particularly influenced by colour trends. For this (price-sensitive) sub-segment, those colours need to come back in your garden furniture.

Figure 4: MADE.COM - various styles of garden furniture

Source: [MADE.COM @YouTube](#)

Tips:

- Study specific interior styles and (re-)design your garden furniture accordingly.
- Stick to your chosen style and avoid diluting it with others.

The garden = wellness

European consumers are actively looking for ways to improve their physical and mental wellbeing. This need is further stimulated as [the COVID-19 pandemic has made consumers more acutely aware of the importance of both their mental and physical wellness](#). The garden brings a connection with nature and fresh air that helps them feel healthy and invigorated.

Gardens are also secluded places, often fenced off from the outside world, that help an over-stimulated consumer to switch off, relax and recharge their batteries. Furniture related to this trend must be highly ergonomic, to support the body in passive and more active resting positions. To facilitate the consumer moving around the garden in search of the quietest of and sunniest spot, this type of garden furniture needs to be lightweight, collapsible and suitable for hard and soft surfaces.

Wellness benefits also come from active and passive leisure activities in the garden, such as outdoor games, playing with the dog, reading, or simply taking a nap.

Tips:

- Develop garden furniture that can help consumers relax, such as deck chairs and daybed couches, as well as more informal seating such as poufs, beanbags and rocking chairs.
- See our [webinar on wellness in HDHT](#) and our article on how [the COVID-19 pandemic boosts the importance of the wellness trend in HDHT](#) for more information.

Social and environmental awareness: the purposeful garden

European consumers are increasingly adopting more sustainable lifestyles. [Millennials](#) are the largest adult age group worldwide, and soon they will be the dominant consumer group as well. Climate change and fairness are main concerns for this generation, which expresses its preferences through its consumption. As such, social and environmental sustainability are rapidly becoming more central consumer needs, also in HDHT.

The pandemic has further emphasised the importance of this trend. For most consumers (particularly the younger generations), [the COVID-19 pandemic has made it more important for both consumers and companies to improve their sustainability](#). In addition, [most people want significant change to make the world fairer and more sustainable after COVID-19](#). As the younger generations are looking for brands that make a stand, social sustainability (greater fairness and diversity in production) will increasingly add value.

These days, the informed gardener's main consideration is: "me and the eco-system". That translates as: how can I make my garden and gardening more inviting for the birds and bees, to contribute to a better climate, including in urban settings? Increasingly, consumers are also growing fruit and vegetables for their own consumption. This type of conscious consumer is mostly found in the mid-high segments. For them, garden furniture from sustainable materials, such as certified or recycled wood, is the obvious choice.

In a recent survey by RM Handelsmedien and spoga+gafa among German gardeners, more than half of all consumers pay attention to environmentally friendly and recyclable materials when buying garden furniture. They avoid plastic or tropical wood. Also, nearly half of all consumers in this survey are willing to spend more money on sustainable or sustainably produced garden products.

Besides the use of eco-friendly materials, furniture companies are also increasingly trying to become carbon-free and reduce their energy use. By producing more sustainably, they are also cutting costs and generally being more efficient. Thus, sustainability can also add to profitability.

When it comes to transport, product design increasingly takes into account the fact that the more items fit into a container, the lower the environmental 'footprint'. At marketing level, brands in the upper half of the market discuss the environmental benefits of timeless design, against the [throw-away society](#) - to urge the consumer to select an item more carefully and enjoy it longer. If more items can be reconverted into new materials at the end of their lifecycle, the environment also benefits.

Handmade is also increasingly seen as more sustainable because it often means small-scale, meaning less energy and pollution. In garden furniture this is often expressed by amazing craftsmanship, such as joinery, upholstery or wood bending techniques.

Tips:

- Improve your chairs' sustainability by using materials that are local, renewable and/or recycled. Produce effectively and cleanly, pack well to reduce transport space, and help the consumer dispose of the chairs sustainably.
- If your importer is interested, consider sustainable certification options. For more information on this, see our study about [buyer requirements](#).
- Communicate your values online and offline (on the product), to help the (importer and) consumer feel good about having contributed to a better ecosystem by making a sustainable purchase.
- For more information, see our special study on [sustainability](#).

The garden as a playground

Play is a deeply rooted human desire. Today's consumers, young and old, play a lot: in private, as well as in public places, off- and online, to gain new insights at work and at school and in teams, alone or with virtual friends.

Figure 5: Ambient Lounge - outdoor beanbag with matching side table / pouf

Source: [Ambient Lounge @ YouTube](#)

The garden is an ideal playground: consumers not only literally play by participating in outdoor games, but also through roleplaying. Part of the "master chef" trend involves the (mostly male) consumer in the role of the experienced chef behind the barbecue. Stimulated by garden programmes and garden magazines, consumers are also playing the part of the professional gardener, using the same professional toolkit as the gardeners on TV.

Tips:

- Tap into your inner child to be successful in this fun-oriented segment of garden furniture. Playful garden furniture can be colourful, expressive in terms of its shape and design (figurative or quirky), modular (allowing the consumer to "design" their own furniture), and multi-purpose (for example, a chair that can serve a hideaway for children).
- Support the master chef in their role by creating a fun and entertaining setting for the barbecue or outdoor dinner performance.

Rapid urbanisation: the new garden

At present, 56% of the world's population lives in urban areas. The UN expects that percentage to grow to 68%

by 2050. This process of rapid urbanisation might well represent a huge countertrend to all the trends mentioned above. After all, if urban centres become larger and more crowded, will there be space for gardens at all or will they disappear? The 2021 Chelsea Flower Show included new categories for [container and balcony gardens](#) -- highlighting the increasing importance of these small urban garden spaces.

Figure 6: Kave Home - outdoor range for urban spaces

Source: [Kave Home @ YouTube](#)

Housing prices will rise due to the increased scarcity of space in the urban centres. As a result, forms of shared living are being created, which include communal gardens. Urban planners are trying to redesign the urban space to make it future proof. This increasingly involves innovative concepts such as gardens on rooftops, on and around high rises, and on disused train tracks. Such forms of human-centred urban development are referred to as social design.

Communal garden furniture must, above all, be functional, durable and fool proof, as it seems to be human nature to treat communally owned property with less care than personal possessions. This also makes the garden furniture more price sensitive, as the turnaround cycle can be quite high. As shared gardens are still going to be small, the furniture needs to be compact, modular, easy to carry around and multi-purpose. Styles must be acceptable for all inhabitants (often an inter-generational group), so not too expressive.

This trend extends from the home to the office. In the workplace, consumers are increasingly in need of this same closeness to nature and are building their indoor garden in the office, as well. This is opening up new segments in "indoor garden furniture" in the project market. The project market for urban garden furniture for (restyled) city gardens is expected to flourish. Requirements and regulations aimed at protecting consumers/users and in relation to durability and fool-proofing are stringent. Styles can be quite expressive.

Tip:

- Use natural materials that stimulate the senses by highlighting the textures of natural fibres and materials and using patterns and natural tones. This will help the urban consumer experience the

“indoor garden”. Such “biomimicry” can be extended from the couch and chairs to the accessories, including shelving, planters and wall decoration.


Example company:


Wisanka from Indonesia has successfully tapped into the trends described in this study. They use eco-friendly materials and have participated in environmental conservation by planting new teak trees. The company also produces furniture for the patio or smaller balconies, responding to the rapid urbanisation occurring worldwide. Wisanka recently launched its new **virtual reality showroom** to continue showcasing their products and connecting with their customers when travel is restricted.


This study has been carried out on behalf of CBI by **Globally Cool B.V.** in collaboration with GO! GoodOpportunity.

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