The European market potential for garden furniture

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The European market for garden furniture is pushed 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), there are several categories consisting of various product groups. 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; and
- Stools

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

Table 1: Product codes for garden furniture

Harmonised System (HS)	Description
9401 52	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 furniture of bamboo, rattan, and cane, osier or similar materials 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); and
- 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; and
- 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 30cm to 45-50cm in height. Tables are much higher, usually around 75cm. You also need to consider standard cushion sizes. For normal chairs, cushions are about 46x48cm. For lounge chairs and sofas, they are 60x60cm or 70x70cm. 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 and bamboo, metal, fabrics, or synthetic materials. The items can be upholstered with fabric or come with cushions.

The quality of the raw materials and the 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, ranging from sun to rain and snow. Otherwise, it needs to be shielded, for instance with a protective cover.

Design

The aesthetic value of garden furniture is high, especially in the upper segments of the market. 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?

Europe is an interesting market for garden furniture, because consumers are focusing more and more on their garden and because the barrier between the indoors and the outdoors is disappearing. The demand for environmentally friendly (outdoor) furniture is stimulating the European market for furniture of bamboo, rattan, and cane, osier or similar materials specifically. The imports of these products have grown considerably, especially those coming directly from developing countries.

Because no specific product codes are available for garden furniture, these statistics cover furniture of bamboo, rattan and cane, osier or similar materials as an example.

Source: UN Comtrade

European imports of furniture of bamboo, rattan and cane-like materials grew from €570 billion in 2018 to €825 million in 2022, at an average annual rate (CAGR) of 9.7%. About 75% of this was cane-like materials, 13% rattan, and 12% bamboo. A particularly strong performance in 2021 could be explained by lockdowns resulting in an increased focus on the home and garden, and a need for comfortable (outdoor) furniture.

Nearly half of the import value came directly from developing countries. These imports grew from €253 million in 2018 to €393 million in 2022, at a strong CAGR of 12%. This makes Europe an interesting market for you, as an exporter from a developing country.

The effects of the COVID-19 pandemic and the war in Ukraine have disrupted international trade. At the same time, garden furniture fits in well with the increased focus on the home and trends like ‘home sweet home’ and wellness. As outdoor spaces become an extension of the home in purpose and style, this may (partially) compensate for the pressure that the so-called cost of living crisis puts on consumer spending. For more drivers of demand, see ‘which trends offer opportunities?’.

Tip:

Be prepared for potential future trade disruptions. See our study on how to respond to COVID-19 for information on how to future-proof your business.

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.

Source: UN Comtrade

In 2022, France, the United Kingdom and Germany were Europe's leading importers of furniture of bamboo, rattan and cane-like materials with 14-15% of imports each. 66% of the French have access to a garden next to their home, which adds up to around 40 million people. 75% of British adults have access to a private garden, which also amounts to roughly 40 million people. There are 36 million people aged over 14 in Germany whose households own a garden. In addition, several millions of consumers have their own balcony or patio space.

Smaller markets with a share of less than 10%, but still in the top 6 leading importing countries, are Switzerland (7.9%), the Netherlands (7.3%) and Spain (6.8%).

Focus on segments

European countries have different roles in the HDHT market. Some are mainly importers and others are mainly manufacturers. Western European countries are mainly importers, and most Western European importers are re-exporters. They do not just sell their products in their own country, but they distribute them across the continent. This explains why in HDHT, small countries like the Netherlands often import much more than they consume.

In terms of marketing, you should know that countries are not markets. The HDHT market consists of different segments, ranging from low- to high-end (see our study on market entry for garden furniture). Every European country has these segments, although their size may vary. Therefore, it makes much more sense for you to focus on a segment in your product group and connect to importers in that segment. These importers will then sell your products in that segment across Europe.

Consumer spending is under pressure

Garden furniture sales are sensitive to economic cycles. When economic circumstances and prospects are down, consumers postpone buying items that they do not urgently 'need'. When economic conditions are good, purchases of such non-essential products tend to rise.

European consumer confidence fell sharply in March 2022 due to the situation in Ukraine and the subsequent energy crisis. This reflected a large drop in households' expectations about the general economic situation in their country, and their own future financial situation. Consumers' intent to make major purchases also fell. This lower consumer confidence may well lead to lower spending, which is reflected in modest forecasts for 2023/2024.

Source: OECD

* 2023 and 2024 are forecasts

Before the COVID-19 pandemic, consumer spending ('private consumption expenditure') in the leading European markets grew by about 1-3% per year. Due to the pandemic, 2020 broke with this trend. In 2021, growth bounced back into positive figures. Forecasts for 2023/2024 are modest, in line with consumer confidence.

France is the leading European importer

Due to steady growth in imports, France became Europe's largest importer of furniture of bamboo, rattan and cane-like materials in 2022. The country's imports grew from €80 million in 2018 to €123 million in 2022, with a

CAGR of 11%. About three-quarters of these imports were cane-like materials, which is average in Europe.

After falling to a low of 42% in 2020, the direct import market share of developing countries returned to 53% in 2022. This is slightly above the European average. These imports grew at a CAGR of 11%, from €42 million in 2018 to €65 million in 2022. Leading suppliers are China (28% in 2022), Italy (20%) and Indonesia (10%). China and Italy mainly supplied France with furniture of cane-like materials, whereas Indonesia specialises in rattan.

Brexit may stimulate direct trade with the United Kingdom

The United Kingdom could well offer you opportunities, considering the country's high imports from developing countries and potentially increased interest in direct sourcing. 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.

British imports grew from €49 million in 2018 to €113 million in 2022, with a CAGR of 23%. This was mainly due to a strong increase in imports from Italy and Poland in 2022. Because of this, the direct import market share of developing countries fell to 53% in 2022. Although this is above average, it used to be about three-quarters, which was among the largest in Europe. Nevertheless, developing countries performed well, with imports growing from €36 million in 2018 to €60 million in 2022.

China continues to be the leading supplier (36% in 2022). Italy (19%), Poland (17%) and Indonesia (8.8%) follow. Italy and Poland almost exclusively supplied furniture from cane-like materials.

Germany has large domestic and transit markets

Germany's large domestic market and role as a trade hub can make this an interesting market for you. Although the country's imports of furniture of bamboo, rattan and cane-like materials peaked in 2021, it continues to be one of the three largest markets in Europe. Imports grew from €88 million in 2018 to €112 million in 2022, with a CAGR of 6.4%. About 60% of this was cane-like materials and about 30% bamboo. The country's role as a key trade hub in Europe may have helped it maintain a strong performance when global trade was disrupted in 2020-2021.

About half of Germany's import value came directly from developing countries, which is fairly average in Europe. These imports grew from €40 million in 2018 to €57 million in 2022, with a CAGR of 9.1%. China is Germany's main supplier, with a share of 37% in 2022. Poland (12%) and the Netherlands (10%) follow.

Switzerland increases its imports from developing countries

The fourth largest importer of furniture of bamboo, rattan and cane-like materials is Switzerland. Swiss imports grew from €47 million in 2018 to €65 million in 2022, with a CAGR of 8.8%. This was mainly due to a doubling of the direct imports from developing countries, from €10 million to €20 million. Nevertheless, their 30% market share remained below-average.

Nearly 90% of Swiss imports were cane-like materials. Leading suppliers are Italy (34% in 2022), Germany (19%) and China (18.3%).

The Netherlands is an important European trade hub

The Netherlands is an important European trade hub, with relatively high imports of furniture of bamboo, rattan and cane-like materials from developing countries. This could make the country an interesting market for you.

Dutch imports grew from €43 million in 2018 to €60 million in 2022, with a CAGR of 8.5%. Growth was particularly strong in 2020 (46%) and 2021 (56%), leading to a peak of €106 million. Direct imports from developing countries more than doubled, from €15 million in 2018 to €36 million in 2022, with a CAGR of 24%.

This translates to an above-average market share of 60%. Strong growth has made India the leading supplier, with a share of 23% in 2022. China (19%) and Germany (11%) follow.

Since the Netherlands heavily depends on international trade, Brexit and international trade disputes may have a big impact on the country. This makes Dutch imports difficult to predict.

Spain increases its imports despite economic struggles

Spain is the sixth-largest European import market for wooden tableware and kitchenware. The Spanish economy experienced the largest drop in Europe, with a decrease in GDP of -11% in 2020. The Spanish economy is the slowest to recover in Europe. This, of course, could limit your opportunities in Spain for the coming years. However, the country's imports of furniture of bamboo, rattan and cane-like materials are performing well.

Imports grew from €36 million in 2018 to €56 million in 2022, with a CAGR of 11%. In 2022, 73% (€41 million) came directly from developing countries – the largest share in Europe. Leading suppliers are China (46% in 2022), Italy (15%) and Indonesia (11%).

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. Key topics are wellness, sustainability, extending the home into the garden, playfulness and urbanisation.

The garden = wellness

European consumers are actively looking for ways to improve their physical and mental wellbeing. The COVID-19 pandemic has made them more acutely aware of the importance of their wellness: two-thirds of consumers have become more conscious of looking after their physical/mental health. In a global Young Living survey, 48% of respondents report they are making wellness and self-care a top priority. In line with this trend, the garden brings a connection with nature and fresh air that helps people feel healthy and energised.

Gardens are also private places, often fenced off from the outside world. This can 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 and sunniest spot, this type of garden furniture needs to be lightweight, collapsible and suitable for hard and soft surfaces.

Increasingly, we see garden furniture in the form of parasols and other sun blockers, and diversity in the offer of garden sheds. Consumers are trying to create a coherent style that also increasingly matches the indoor style. An example of this is the daybed, which has also moved outdoors, replacing the simpler deck chair at the luxury end of garden furniture.

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.

Home sweet ... garden

The Home sweet home trend fits neatly in the wellness experience in the garden. Core to the home sweet home trend is the idea of 'cocooning'. This represents the need to surround yourself with the things and people you love. As such, the trend is also about families and friends enjoying each other's company, entertaining each other, cooking and dining, or just relaxing. The COVID-19 pandemic has strengthened these two aspects of inside living.

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, from mid-mid upwards. Here, the typical mid-market styles (such as romantic, "contemporary", colonial, nostalgic or 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 and responds to the cyclical influence of certain interior trends, which are particularly driven by colour trends. For this (price-sensitive) sub-segment, those colours need to come back in your garden furniture.

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 has boosted the importance of the wellness trend in HDHT for more information.
- Study specific interior styles and (re-)design your garden furniture accordingly.
- Stick to your chosen style and avoid diluting it with others.

Social and environmental awareness: the purposeful garden

Social and environmental sustainability are quickly becoming central consumer needs, also in HDHT. European consumers are increasingly adopting more sustainable lifestyles. The COVID-19 pandemic and the increased attention for the climate/environment have boosted this trend. At the same time, the current cost-of-living crisis drives the need for sustainable products to be affordable.

Especially for younger generations, the pandemic has made it more important for consumers and companies to improve their sustainability. An impressive 86% of European consumers consider sustainability to be (very) important. 29% deliberately and consciously buy sustainable products. In addition, most people want significant change to make the world fairer and more sustainable after COVID-19. Millennials will soon be the dominant generation of consumers. They care about sustainability and express this by buying products (from companies) that contribute to a better world.

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 is reflected in France, for example, where 80% of people with a garden use it to help protect the environment and biodiversity. 68% (also) use it to eat differently.

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.

According to a recent survey among German gardeners, most consumers pay attention to environmentally friendly and recyclable materials when buying garden furniture. They avoid plastic or tropical wood. Also, nearly half of the 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 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 production, meaning less energy and pollution. In garden furniture this is often expressed by amazing craftsmanship, such as joinery, upholstery or wood-bending techniques.

Tips:

- Use sustainable solutions for raw materials, production, transport and distribution, consumer use and waste disposal.
- If your products have a unique origin and/or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to your concept, and to your importer's concept.
- If your importer is interested, consider sustainable certification options such as fair trade or BSCI compliance. For more information on this, see our study about market entry for garden furniture and our study about buyer requirements for HDHT.
- See our special study on sustainability in HDHT for more information, as well as our webinar on sustainability in the European HDHT market.

The garden as a playground

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

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; or
- Multi-purpose: For example, a chair that can serve as a hideaway for children.

Figure 4: Ambient Lounge – outdoor beanbag with matching side table or pouf

Source: Ambient Lounge @ YouTube

This trend sees the category of garden furniture merging with that of toys and games. Kids get their own garden furniture in playful shapes, often modular, so that it can be played with. Pets also get their own pieces of outdoor furniture, ranging from easy chairs for cats and dogs to poufs and beanbags.

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.

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, about 55% 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 5: Kave Home – outdoor range for urban spaces

Source: Kave Home @ YouTube

Housing prices will rise due to the increased scarcity of space in urban centres. As a result, forms of shared living are being created, which include communal gardens. Urban planners are trying to redesign urban space to make it future-proof. This increasingly involves innovative concepts such as gardens on rooftops, on and around high rises, and on train tracks that are no longer in use. Such forms of human-centred urban development are referred to as social design.

Communal garden furniture must be functional, durable and foolproof, as it seems to be human nature to treat communally owned property with less care than personal possessions. This also makes garden furniture more price-sensitive, as the turnaround cycle can be quite high. As shared gardens are still going to be small, 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 also building their indoor garden in the office. 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 to 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:

Figure 6: Wisanka – teak outdoor furniture set

Source: Wisanka @ YouTube

Wisanka from Indonesia has successfully tapped into the trends described in this study. They use eco-friendly materials, including roots, twigs and other wood waste. In some of their designs, they combine materials like stainless steel and teak wood. Their outdoor furniture ranges from lounge sets and dining sets to sunbeds and chairs. Wisanka also produces furniture for the patio or smaller balconies, responding to the rapid urbanisation occurring worldwide.

Globally Cool B.V. in collaboration with GO! GoodOpportunity carried out this study on behalf of CBI.