The European market potential for bed textiles

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Europe’s market for bed textiles has potential, but competition is strong. Developing countries are Europe’s main source of bed textiles, supplying nearly two-thirds of imports. This makes Europe an interesting market for you. A continued growing interest in sustainability and wellness offers opportunities, driving the popularity of natural materials and eco-friendly production. Emphasising the story behind your products can further add value to your products. Functionality and design can give you an advantage.

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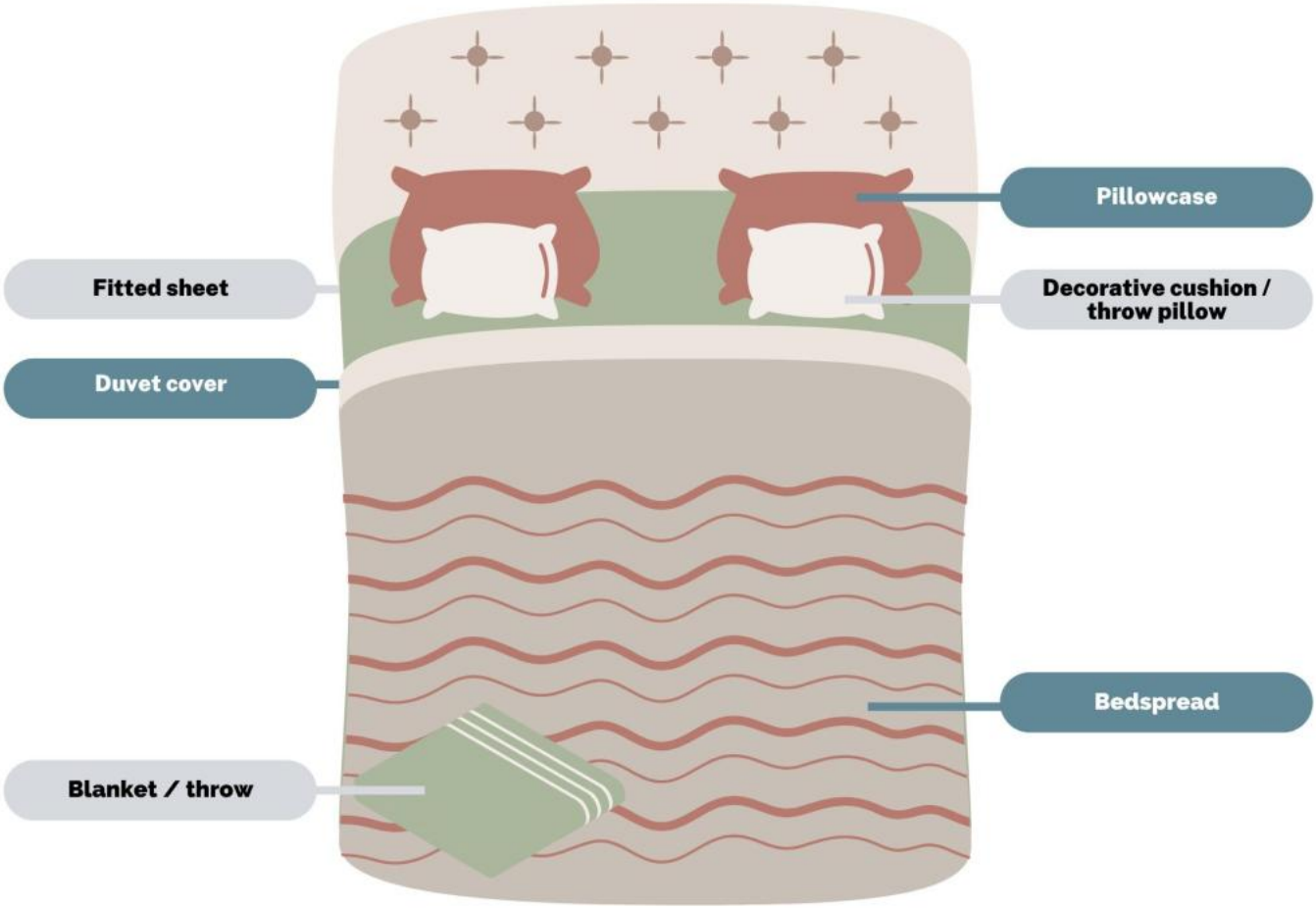
1. Product description: bed textiles

In home decoration and home textiles (HDHT), there are several categories consisting of various product groups. Bed textiles are categorised under home textiles. The product group typically consists of bedspreads and duvet covers (and pillowcases).

A duvet cover is a large fabric bag that protects the duvet, a type of bedding consisting of a soft bag filled with feathers, wool or a synthetic alternative. Duvet covers usually come with matching pillowcases. A bedspread is a piece of fabric designed to cover the bed, mainly for decoration.

Figure 1: Bedroom textiles



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

This study uses the following codes to refer to trade in different types of bed textiles:

Table 1: Product codes

Harmonised System (HS)	Description
6302 10	Bed linen, knitted or crocheted
6302 21	Bed linen, printed, of cotton
6302 22	Other bed linen, printed, of man-made fibres
6302 29	Bed linen, printed, of other textile materials
6302 31	Other bed linen, of cotton
6302 32	Other bed linen, of man-made fibres

Harmonised System (HS)	Description
6302 39	Other bed linen, of other textile materials
6304 11	Bedspreads, knitted or crocheted
6304 19	Bedspreads, other

Duvet covers

Since duvets cannot be cleaned too often due to their delicate filling, duvet covers are used to protect them from dust and stains. They have buttons, snaps, ties, an envelope/flap or a zipper at the bottom, so they can easily be removed and washed. Duvet covers also have a decorative purpose. Functioning as bed covers, they can change the look and atmosphere of a bedroom in a simple and inexpensive way.

Like bedspreads, duvet covers are available in a wide variety of fabrics. However, since they are washed regularly, the most commonly used material is cotton, which combines breathability and durability. Cotton can also be blended with other (man-made) fibres to make the duvet cover easier to iron. Other raw materials include linen, silk and polyester.

Duvet covers come in a variety of designs, often with matching pillowcases or pillow shams, sheets and/or bed skirts. Style options include a natural look, floral patterns, geometric shapes, fantasy images, tropical and animal prints, photo prints and solid colours. Handmade duvet covers often have (traditional) embroideries and patchwork designs.

Sizes also vary depending on bed dimensions. Common adult sizes for duvet covers in Europe are:

- 150 x 210 cm (single bed);
- 200 x 200 cm (double bed);
- 240 x 220 cm (king-size bed);
- 260 x 220 cm (super king-size bed).

Other sizes are also possible, depending on the target country. Ask your European buyer what specific sizes they are looking for in the early stages of collaboration. Duvet covers generally do not have joints in the front or back, so for example, a minimum fabric width of 220 cm for double bed duvet covers is advisable. This affects the kind of looms you (or your fabric supplier) need to use.

Bedspreads

While bedspreads mainly serve as decorative items for the bed, they can also be used for warmth. They provide an easy way to change the decoration of the bedroom, where the bed is the main focus.

Bedspreads come in various fabrics, such as cotton, linen and wool. Blended yarns and mixed fabrics are also common. Premium bedspreads can be made of luxurious fibres, like silk and cashmere. Bedspreads come in a wide variety of designs, styles and patterns. They can be colourful or plain to match every personal taste.

Sizes vary depending on bed dimensions. Common sizes for bedspreads in Europe are:

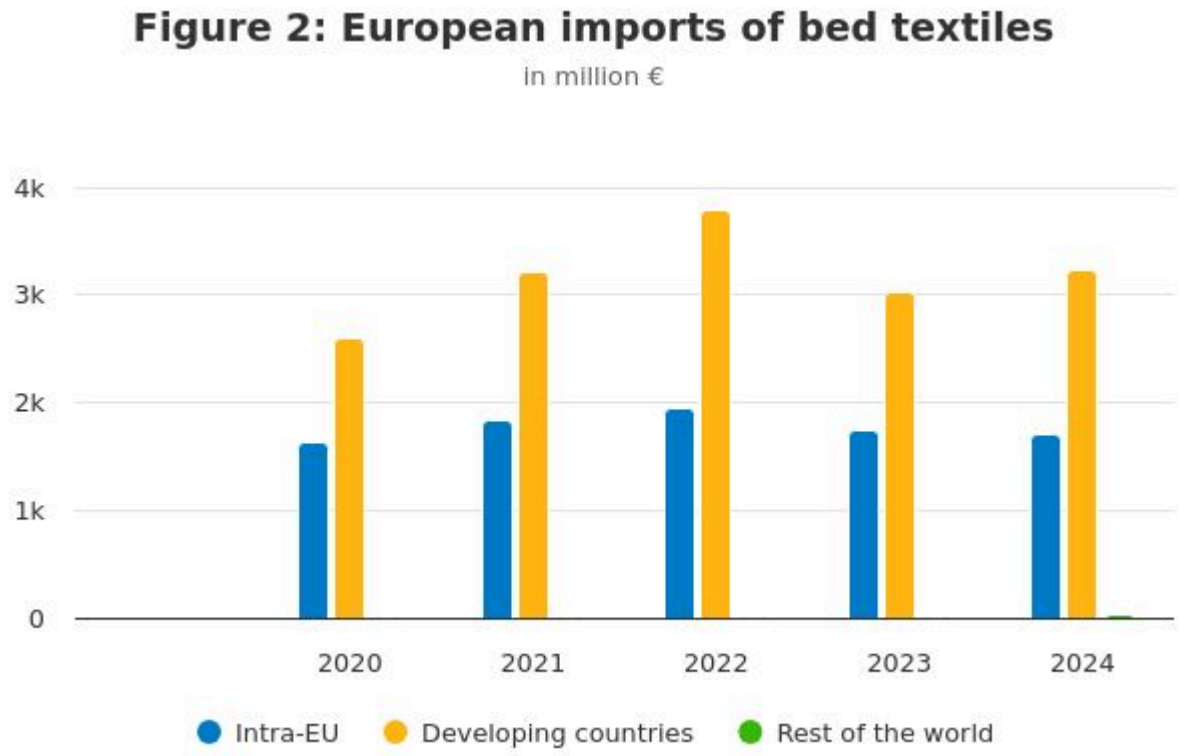
- 140 x 200 cm;
- 180 x 220 cm;

- 200 x 280 cm;
- 240 x 280 cm;
- 210 x 270 cm;
- 260 x 290 cm.

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

2. What makes Europe an interesting market for bed textiles?

The European market for bed textiles has been performing well recently, with a peak in 2022. About two-thirds of the 2024 import value came directly from developing countries.



Source: UN Comtrade & Eurostat Comext, 2025

Between 2020 and 2024, Europe's bed textile imports grew from €4.2 billion to €4.9 billion, at an average annual rate (CAGR) of 4.0%. This included a peak of €5.7 billion in 2022. In 2024, Europe accounted for about 43% of the worldwide import market for bed textiles. Most of these imports were cotton bed linens (58% in 2024), followed by synthetic bed linens. Bedspreads accounted for 3.4% of imports in 2024.

Nearly two-thirds of Europe's bed textile import value came directly from developing countries. These imports grew from €2.6 billion in 2020 to €3.2 billion in 2024, at a relatively strong CAGR of 5.6%. This makes Europe an interesting market for you, as an exporter from a developing country.

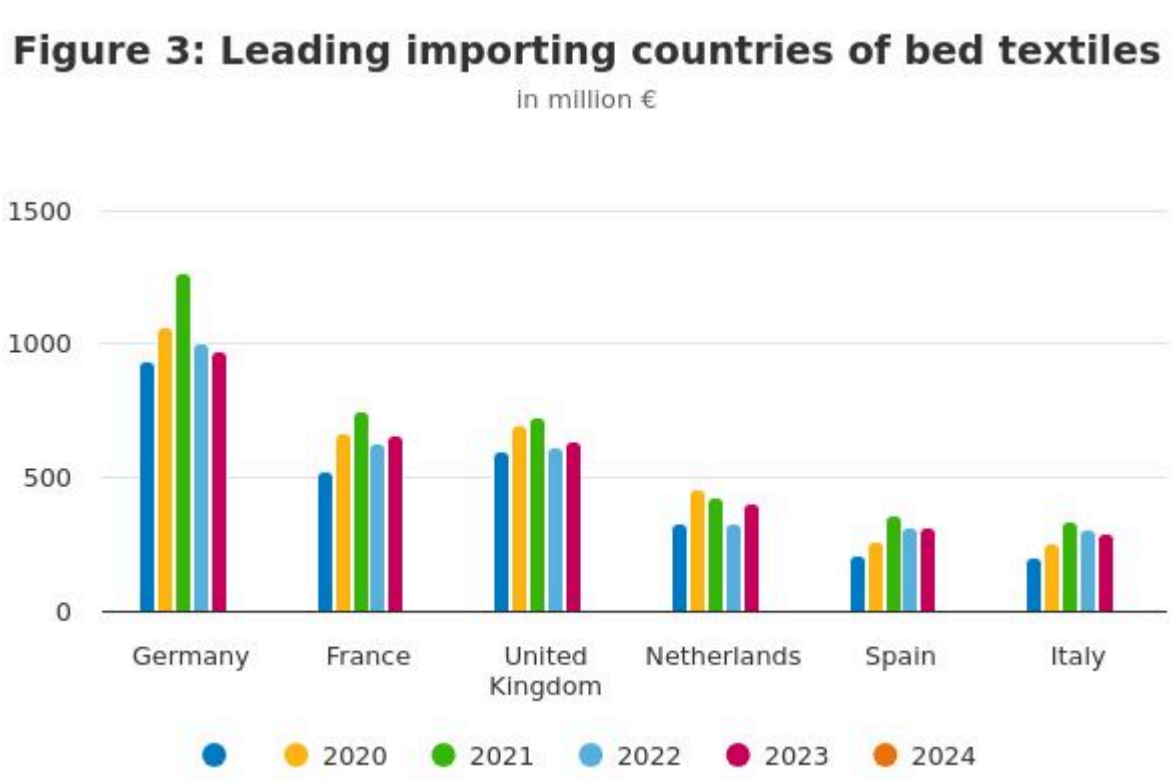
Various international trade disruptions continue to affect the cost and availability of raw materials, energy and transport. At the same time, lockdowns have led to an increased focus on the home. Combined with trends like

wellness and sustainability, this may (partially) compensate for the pressure that the 'cost-of-living crisis' has put on consumer spending. For more drivers of demand, see the section on trends.

3. Which European countries offer the best opportunities for bed textiles?

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

Figure 3: Leading importing countries of bed textiles



Source: UN Comtrade & Eurostat Comext, 2025

Germany was Europe's leading importer of bed textiles, accounting for 20% of imports in 2024. It was followed by France and the United Kingdom (UK), with 13% each. The Netherlands (8.0%), Spain (6.4%) and Italy (5.8%) rounded out the top 6.

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 products in their own country, but also 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 (also see our study on Entering the European market for bed textiles). Every European country has these segments, although their size may vary. It makes

much more sense for you to focus on a segment in bed textiles and connect with importers in that segment. These importers will then sell your products in that segment across Europe.

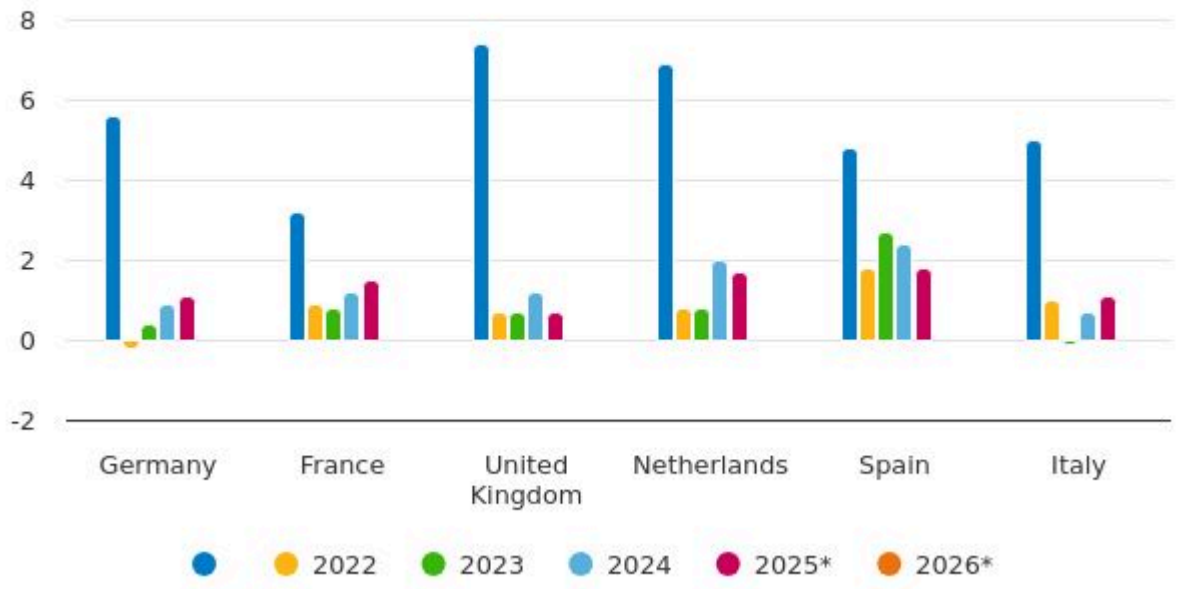
Consumer spending is under pressure

Bed textile 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 non-essential products tend to rise. Reflecting this, 94% of consumers in an international survey said they would consider cutting spending on home décor in the event of an economic downturn.

European consumer confidence fell sharply in March 2022 due to the war in Ukraine and the cost-of-living crisis that followed. Although it has improved since then, consumer confidence is still fragile, scoring below its long-term average.

Figure 4: Real private consumption expenditure growth

in %



* forecast

Source: OECD Economic Outlook 116

The cost-of-living crisis has clearly affected consumer spending (‘private consumption expenditure’) in the leading European markets. Forecasts for 2025/2026 continue to be modest, reflecting low consumer confidence.

Germany is Europe’s largest importer of bed textiles

Europe’s leading bed textile importer is Germany. Its large domestic market and role as an important European trade hub make this an interesting market for you. Between 2020 and 2024, the country’s bed textile

imports grew from €932 million to €974 million, at a CAGR of 1.1%. This included a peak of €1.3 billion in 2022.

Germany's imports from developing countries grew from €593 million in 2020 to €664 million in 2024, at a CAGR of 2.8%. With that, the direct import market share of developing countries grew from 64% to 68%. This is slightly above the European average. Germany's leading bed textile suppliers were Pakistan (35% in 2024), Türkiye (15%) and China (9.5%). Pakistan and China performed especially well, increasing their direct market shares. Other important developing countries included India and Bangladesh (3.8% each).

France increases its bed textile imports from developing countries

France's bed textile imports grew from €520 million in 2020 to €656 million in 2024, at a CAGR of 6.0%. They peaked at €747 million in 2022. In 2024, France's leading suppliers of bed textiles were Pakistan (29%) and Belgium (12%).

With a strong CAGR of 7.6%, France's imports from developing countries grew from €258 million in 2020 to €346 million in 2024. As a result, the direct import market share of developing countries increased from 50% to 53%. Nevertheless, this continues to be below the European average of nearly two-thirds. Besides France's leading bed textile supplier Pakistan, other important developing countries were China (6.1%), Bangladesh (5.8%), Tunisia (4.4%) and India (2.6%). These countries all increased their bed textile exports to France between 2020 and 2024, as well as their direct market shares. This indicates that France could offer you opportunities.

The UK mainly imports its bed textiles from Pakistan

Between 2020 and 2024, the UK's bed textile imports grew from €598 million to €635 million, peaking at €721 million in 2022. This translated to an overall CAGR of 1.5%. Leading supplier Pakistan increased its dominance in the British market, as its import market share grew from 51% in 2020 to 62% in 2024. China followed with a fairly stable 20%. A relatively high 38% of the UK's bed textile imports consisted of synthetic bed linens, mainly provided by its 2 leading suppliers.

Due to Pakistan's strong performance, the direct import market share for developing countries grew from 86% in 2020 to 94% in 2024. This was the largest share among the leading European markets. Other important developing countries included India (6.7%), Bangladesh (3.5%) and Türkiye (1.5%).

Brexit is driving direct imports from developing countries, allowing British buyers to avoid additional fees now that they are no longer part of the European Union's single market. Considering the country's high imports from developing countries and the potential increased interest in direct sourcing, the United Kingdom could offer you opportunities. However, competition from Pakistan is strong.

The Netherlands is an important European trade hub

The Netherlands is another important European trade hub. This could make the country an interesting market for you. With some fluctuations, its bed textile imports grew from €328 million in 2020 to €398 million in 2024. This translated to an overall CAGR of 5.0%. Pakistan has recently strengthened its dominant position in the Dutch market, as it has done in the UK. Its import market share grew from 50% in 2020 to 59% in 2024. Germany and China followed with 11% each.

As a result, developing countries' direct share of the Netherlands' bed textile import market grew from 73% in 2020 to 82% in 2024. This was well above the European average. Other important developing countries included Türkiye (4.2%), India (3.8%), Bangladesh (2.0%) and Egypt (0.9%). As a key European trade hub, the Netherlands could offer you opportunities, although competition is strong.

Spain’s bed textile imports have made a comeback

With a strong CAGR of 11%, Spain’s bed textile imports grew from €207 million in 2020 to €314 million in 2024. Because Spain was hit hard by the COVID-19 pandemic, its bed textile imports were relatively low in 2020. Recent import values, however, were much higher than before 2020.

Spain sourced about two-thirds of its bed textile imports directly from developing countries, which is comparable to the European average. These imports grew from €138 million in 2020 to €206 million in 2024, at a CAGR of 11%. Pakistan was the leading supplier, with a share of 45% in 2024, followed by Portugal (13%), China and Germany (11% each). Other important developing countries included India (3.1%), Bangladesh (2.2%) and Türkiye (1.6%). Cambodia performed especially well, with a share that grew from 0.7% in 2020 to 1.5% in 2024.

Italy mainly imports bed textiles from developing countries

Much like Spain, Italy’s bed textile imports are performing well after a pandemic-related dip. They grew from a relatively low €200 million in 2020 to €287 million in 2024, at a CAGR of 9.4%. Italy’s leading bed textile supplier is Pakistan, with a direct import market share of 45% in 2024. Türkiye followed with 9.8%, and China with 6.7%.

Direct imports from developing countries made up around three-quarters of the Italian market, which is well above the European average. They grew from €155 million in 2020 to €216 million in 2024, at a CAGR of 8.6%. Among the smaller suppliers, Bangladesh performed especially well. The country nearly doubled its bed textile exports to Italy from €4.2 million to €8.2 million, growing its direct import market share from 2.1% to 2.9%. This suggests the Italian market for bed textiles could offer opportunities.

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. Which trends offer opportunities or pose threats in the European bed textiles market?

The market for bed textiles is influenced by various trends, often related to trends for HDHT on a sector level. Key topics are wellness and sustainability. Aspects of these trends are connected.

Wellness: improving mental and physical health

European consumers are driven by the wish to improve their mental and physical health. To boost their mental and spiritual wellness, they increasingly value healthy sleeping habits, connecting with nature, and spa and yoga practices. Sleep consistently ranks as the second-highest wellness priority for international consumers, behind health.

While the wellness trend was traditionally seen most in higher market segments (where people can afford luxury products), this lifestyle is now becoming mainstream. 89% of people worldwide took more action to improve their wellbeing in 2024 than the year before. This creates new opportunities for more affordable concepts.

In a Life at Home survey, 40% of respondents who felt more positive about their home also saw a positive impact on their mental health. The 2 most important activities for achieving a sense of wellbeing at home are sleeping and relaxing. Bed textiles can create a relaxed atmosphere in the bedroom and improve sleep quality. According to the Global Wellness Institute's Sleep Initiative, breathable linens are designed to regulate body temperature and provide a soothing and comfortable sleeping experience.

Figure 5: Soak&Sleep – luxury mulberry silk bed linen

Source: Soak&Sleep @ YouTube

The feeling of wanting to escape to nature, combined with a lack of time in busy city life, inspires designers to merge outdoor imagery with indoor decoration. Styles with natural raw materials or natural colours are popular (for example in minimalist/Scandinavian designs), as well as flowers or leaf patterns, green colours and print combinations that relate to natural habitats.

Another aspect of wellness is personal development or self-improvement, for example through acquiring new knowledge or skills. Especially in the higher segments of the bed textiles market, there is an increased interest in production processes (such as weaving techniques) and the makers' stories (the social and cultural origins of products and designs). Some consumers are even joining weaving classes or learning to crochet, embroider, knit or quilt so they can make their own bedspreads.

Tips:

- Use natural colours and patterns that resemble nature to give your duvet covers and bedspreads a natural look. Use elegant materials and designs to target the mid- to high-end market.
- You can offer stories about the production process and the people who make the products, or even online classes (live-streamed or recorded) in crafts like weaving and dyeing. Discuss with your buyers how your stories and branding can effectively support theirs.

Consider working with producers of complementary spa and wellness products to create a more coherent collection.

See our webinar on wellness in HDHT for more information.

Sustainability: people and planet

European consumers and designers increasingly strive to minimise negative environmental effects of their consumption and production. In Europe's leading HDHT markets, most consumers believe that having a sustainable lifestyle is important. They are making more sustainable choices, especially in the mid-high to high-end market segments. This is driving producers of bed textiles towards sustainable (renewable, circular, recycled, and so on) materials and production techniques, including sustainability labels and commitments.

For many consumers in leading European markets, sustainability is highly or extremely important when buying bedding and other home textiles, according to an IFH KÖLN study for Messe Frankfurt. Most are prepared to spend a bit more on sustainable options. The study also revealed that sustainable materials, fair working conditions, sustainable production and waste prevention are most important for bedding. Other key aspects include environmentally friendly packaging, recyclability and certification, especially of sustainable materials and production processes.

For bed textiles, key topics regarding social and environmental sustainability include:

- Materials: Are your materials renewable? Are they traceable and responsibly traded?
- Production process: Can you reduce your energy and water use? Are you making effective use of your materials? Can you prevent water, air and soil pollution, for example in the dyeing process? Can you reuse waste, either inside the production system or elsewhere? Can you avoid pollutive treatment processes, or offer untreated products? In general, can you ensure low-impact production?
- Labour and ethical practices: Does production take place in a safe and healthy way? Are your labour contracts fair?
- Transport: Do you use clean transport options? Do you pack containers effectively? Are your packing materials recyclable?

According to the Global Wellness Institute's Sleep Initiative, natural and organic materials such as cotton and silk provide a soft and comfortable feel that promotes better sleep quality. Materials like organic cotton, hemp and bamboo are trendy for bed textiles. Ramie and soy silk are also popular for duvet covers. Textile production is estimated to be responsible for about 20% of global clean water pollution through dyeing and finishing products. In addition to using sustainably produced fibres, decreasing or eliminating chemicals used to turn fibre into yarn is essential.

Figure 6: URBANARA – Ethically produced bed textiles made of natural materials

Source: URBANARA @ YouTube

Tips:

- Use sustainable materials, like organic cotton, bamboo, silk, wool or even cashmere. You can use certified organic cotton or another certification to add further value to your product. For more information, see our studies on Entering the European market for bed textiles and buyer requirements for HDHT.
- Consider possibilities to further reduce your environmental impact, like using natural dyes or dyes with a higher fixation rate, using machines that require less water for processing, or reducing salt use. In cotton textile processing, the use of chemicals, water and energy is highest when dyeing and finishing the product.
- Clearly communicate your specific sustainable values and practices. Emphasise the story behind your product in your promotion strategy.
- For more information, see our study on sustainability in HDHT, our tips on going green and becoming socially responsible, and our webinars on sustainability in the European HDHT market, sustainable innovations for your HDHT business and the sustainable transition in apparel and home textiles.

Functional excellence

In bed textiles, competition is increasingly based on functionality – how the fabrics perform during use. For example, some fabrics help with temperature regulation: they have a cooling effect when it is warm, and a warming effect when it is cold. Other important functional features include hypoallergenic, anti-bacterial, moisture-control, antistatic and odour-absorbing qualities. These properties are related to sleep comfort. Others offer a longer life span, for instance by using hard-wearing fabrics (often a combination of material and construction), or stain-resistant, water-repellent and/or lightfast materials.

This product group is largely industrial and high-tech, especially in the lower and middle ends of the market, and requires bulk production processes. Manufacturers in these segments are always working on performance innovations.

Alternatively, small and medium-sized enterprises (SMEs) in a less high-tech environment can offer local, natural materials with some or most of the popular functional properties. For example, they could have a long cultural tradition of using fabrics with anti-bacterial or heat-regulating qualities. Sourcing these materials is a big trend, especially if they offer both performance and sustainability benefits. Their functional properties must be tested and verified.

Tips:

- Use independent, reputable sources such as Intertek or Bureau Veritas to test and verify the functional properties of your materials. Accompany the market launch of your products with test reports. If testing proves too costly, consider asking a trusted buyer to contribute. However, they may then demand exclusivity (the exclusive rights to buy these products from you).
- If you use natural dyes for your bed textiles, have their colour fastness professionally tested. Some buyers worry about the bleeding or fading of colours, which may lead them to avoid naturally dyed bed textiles. Professional test reports can convince them as well as their resellers. People in the trade who understand natural dyeing will accept a certain amount of deviation.
- Follow developments in your market to avoid missing out on vital product values. The best way of doing this is to visit European HDHT trade fairs like Ambiente, Heimtextil and Maison&Objet, and follow brands in your segment.

The power of design

European buyers of bed textiles, especially in the high-volume lower and lower-middle segments, are increasingly trying to stand out from their competitors through design. They often do this through licensing. This involves buying the rights to a well-known brand, often from the entertainment industry, and applying it to bedding. The more global the appeal of the licensed brand, character (such as Mickey Mouse or Hello Kitty), or artwork (such as the Beddinghouse x Van Gogh Museum Amsterdam collection), the bigger the potential customer base.

Another strategy in bed textiles (and other textile categories) is to outsource to artists who specialise in designs, patterns and styles. In this case, the artist in question is paid a fee to produce a specific design. This can offer advantages in terms of marketing, cost-effectiveness and reduced time to market.

At the upper ends of the textile market, collaborations between textile brands/manufacturers and famous (textile) designers are common. This can be a strategy to create collections that are innovative in terms of technique or look and feel. The Danish textile brand Kvadrat is famous for its collaborations.

Figure 7: Kvadrat/Raf Simons Collection

Source: Design Middle East @ YouTube

Behind all of this is the belief that design can make a difference, especially in a crowded and demanding textile market.

Tips:

- Be a design powerhouse. While you may not be able to afford licensing, your own culture can also offer patterns, designs or even complete design stories. Offer these to your buyers, allowing them to adapt them to create appropriate looks for their markets.
- Work with local designers. Many of them will have ideas, colours and styles that are relevant for your buyers' markets, or that can be adapted into commercially attractive designs.
- Avoid 'cultural appropriation': using someone else's cultural expressions for commercial purposes, without crediting the sources or rewarding the original designers. This is an ethical issue that has become part of the broader sustainability/fairness discussion. Western buyers are increasingly (being made) aware of this, so it is important that you credit your design sources.

Example company: DIAMA

DIAMA is a Senegalese textile brand, organised as a collaborative group of artisans in a workshop (RAABALMA) in the suburbs of Dakar. The brand has a strong sustainable profile. Its production cycle is entirely traceable, from fibre to finished product. Artisans use traditional handweaving techniques and designs to create a contemporary collection of bedspreads, plaids, cushion covers, kimonos and scarves. They use natural materials, mainly organic and fair-trade cotton produced and hand-spun in Senegal. The

cotton is rain-fed, so it requires no watering.

Fabric is dyed with plant extracts to prevent water pollution and health risks. Since June 2023, all DIAMA products are GOTS-certified. This verifies environmental and social responsibility throughout the production chain, as well as the organic fibre content of the products.

Globally Cool carried out this study in partnership with GO! Good Opportunity and Remco Kemper on behalf of CBI.

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