The European market potential for bed textiles

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The European market for bed textiles is large and fairly stable. 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 you opportunities, driving the popularity of natural materials and eco-friendly production. Emphasising the story behind your products can further add value to your products. Offering personalisation and the option to work via co-creation can give you a competitive edge.

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1. Product description

Within the Home Decoration and Home Textiles (HDHT) sector, bed textiles are categorised under home textiles. The bed textiles product group typically consists of bedspreads and duvet covers (and pillowcases).

A bedspread is a piece of fabric designed to cover the bed, from top to bottom and from side to side. Although bedspreads can be used for warmth, they are primarily used as decorative articles for the bed.

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 have button, envelope/flap, snap, tie or zipper closures at the bottom, allowing the cover to be easily removed and washed. They usually come with matching pillowcases.

This study uses the following product codes to indicate trade in 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
6302 39	Other bed linen, of other textile materials
6304 11	Bedspreads, knitted or crocheted
6304 19	Bedspreads, other
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13 92 16 40	Bedspreads (excluding eiderdowns)
13 92 12 53	Bed linen of cotton (excluding knitted or crocheted)
13 92 12 55	Bed linen of flax or ramie (excluding knitted or crocheted)
13 92 12 59	Bed linen of woven textiles (excluding of cotton, of flax or ramie)

Bedspreads

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

Bedspreads come in a variety of fabrics, such as cotton, linen and wool. Blended yarns and mixed fabrics are also common. Very high-end 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.

Duvet covers

Since the actual duvets cannot be cleaned too often due to their delicate filling, duvet covers are used to protect them from dust and stains. Duvet covers also fulfil a decorative purpose. Being essentially 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 need to be washed regularly the most commonly used material is cotton, which combines breathability and durability. Cotton can also be blended with other (manmade) fibres to make the duvet cover easier to iron. Other raw materials include linen, silk and polyester, although they are not as common.

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

Sizes also vary depending on bed dimensions. Common 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. It is not common to have joints in the front or back of a duvet cover, so for example, a minimum fabric width of 220 cm for double bed duvet covers is advisable. This has consequences for the kind of looms you (or your fabric supplier) have to use.

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

The European market for bed textiles is fairly stable. Almost two thirds of the import value is sourced directly from developing countries, making Europe an interesting market for you.

Between 2016 and 2020, European imports of bed textiles slightly fluctuated around €4.3 billion. In 2020, the outbreak of the coronavirus (COVID-19) led to a -3.9% decrease. This resulted in a total average increase of 0.2% for 2016-2020.

Nearly two thirds of the total European bed textile import value, about €2.6 billion, was sourced directly from developing countries. This makes Europe an interesting market for you, as an exporter from a developing country.

In 2021, the COVID-19 pandemic and the measures taken against it worldwide continue to affect international trade, and this is expected to carry on into 2022. At the same time, lockdowns have resulted in an increased focus on the home and on trends like wellness and sustainability. This may (partially) compensate for the negative effects of the crisis. 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 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 therefore is to focus on a particular segment, rather than a specific country.

In 2020, Germany remained Europe's leading importer of bed textiles with 22% of imports, followed by the United Kingdom and France, with 14% and 12% respectively. Together they accounted for 48% of the total European bed textile imports. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are the Netherlands (7.7%), Spain (4.9%) and Italy (4.7%).

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 products in their own country, but they distribute them across the continent. This explains why in HDHT, small countries like Denmark 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-end (also see our study on market entry for bed textiles). 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 focusing on a specific country. These distributors will then sell in that segment across Europe.

Real private consumption expenditure

An important indicator for growth in demand is real private consumption expenditure. The HDHT sector, which includes the bed textiles 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 bed textile imports increased from €874 million to €928 million. This includes a steady increase of 0.8% in 2020 despite the pandemic, resulting in an overall average growth of 1.5% per year for 2016-2020. Germany sources some 63% of its import value directly from developing countries, which is about the European average. Pakistan (25%) and Turkey (20%) are Germany’s main bed textile suppliers, followed by Poland (14%).

In addition to having a large domestic market, Germany is also a key trade hub within Europe. Combined with a relatively stable market share for developing countries and the forecast economic recovery, this makes Germany an interesting market for you.

Brexit may stimulate direct trade with the United Kingdom

British bed textile imports decreased from €664 million in 2016 to €596 million in 2020, at an average annual rate of -2.7%. This was mainly due to a -8.6% decrease in 2020.

The United Kingdom sourced 86% of its €596 million worth of imports directly from developing countries, which is the largest share among the leading European markets. The country’s main bed textile suppliers are Pakistan and China, who dominate the market with 51% and 21% of imports respectively. India follows with 5.9%, and Bangladesh with 5.0%.

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.

France’s economy is set to recover in 2022

After a -8.0% decrease in 2020, French bed textile imports returned to values similar to those in 2016 (€520 million). The country’s 50% direct import market share for developing countries is below the European average.

Interestingly however, France’s direct imports from developing countries increased from €249 million to €258 million in 2020. This was mainly due to an increase in imports from Pakistan, France’s leading supplier of bed textiles with 26% of imports. Developing countries such as Bangladesh (5.8%), Turkey (3.6%) and Egypt (2.1%) also managed to increase their direct supplies in 2020.

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 unrests 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.

The Netherlands is an important European trade hub

Dutch bed textile imports peaked at €343 million in 2017. After that, they seem to have stabilised at about €324 million. This translates to an average increase of 0.4% per year for 2016-2020, making trade hubs Germany and the Netherlands the only leading bed textile importers that managed to realise an overall import growth between 2016 and 2020.

The Netherlands sourced 74% of its bed textiles directly from developing countries, which is well above the European average. Pakistan dominates the market with a 50% direct import market share, followed by Germany

(13%), Turkey (8.6%) and China (7.3%).

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 bed textiles.

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.

Spain is faced with economic struggles

Spain was hit hard by the COVID-19 pandemic. Spanish bed textile imports plummeted by -13% in 2020. The consequent average decline of -6.1% per year since 2016 resulted in a low of €206 million. Spain sourced around 67% of this directly from developing countries, which is about the European average.

Pakistan is Spain's leading bed textile supplier, with a direct import market share of 38%. China and Germany follow with 15% and 13% respectively.

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.

Italy's economy is expected to recover particularly slowly

Being particularly affected by the pandemic, Italy experienced a GDP decline of -8.8% in 2020. As the Italian economy continues to be forecast as the slowest to recover in Europe, Italian GDP is now projected to reach its 2019-level in 2022. This is expected to affect consumer confidence and the consumption of non-essential products in the coming years.

The hit to Italy's economy is reflected in the country's bed textile imports. After peaking in 2017, they fell by -10% in 2020. The decrease from €245 million in 2016 to €198 million in 2020 resulted in an average annual decrease of -5.2%. Direct imports from developing countries made up around 78% of the market, and consequently followed a similar pattern.

Pakistan and Turkey are Italy's leading suppliers of bed textiles, with direct import market shares of 42% and 14% respectively. Developing countries generally faced declining supplies to Italy, illustrating that for the coming years prospects on this market are likely to be limited.

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 on the European bed textiles market?

The market for bed textiles 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 bed textiles

An expected outcome of the COVID-19 pandemic is that people will be more focused on the home, 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 to spend beyond food, cleaning products, and other household essentials.

However, some areas / product groups could benefit:

- wellness / fitness at home
- working from home
- cooking

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

- re-appreciating their homes and wishing to make them more pleasant, practical and comfortable overall
- bringing the outdoors inside and vice versa
- cleaning out clutter

This is partly a continuation of consumer trends that were already ongoing; some may be accelerated. 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 wellness and sustainability in the bed textiles market.

Wellness: Natural materials and designs

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. This is further stimulated as the COVID-19 pandemic has made consumers more acutely aware of the importance of both their mental and physical wellness.

While the wellness trend was traditionally seen mostly in the higher market segments, where people can afford luxury products, this lifestyle is now becoming mainstream. In a 2021 Young Living survey, 48% report they are making wellness and self-care a top priority. This creates new opportunities for more affordable concepts.

Bed textiles can play a role in wellness, by creating a relaxed atmosphere in the bedroom to improve sleep. 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 among consumers, as well as flowers or leaf patterns, green colours and print combinations that relate to natural habitats.

Figure 4: Beddinghouse – Bed textiles with a natural look

Source: Beddinghouse @ YouTube

Tips:

- When selling your bed textiles in line with the wellness trend, focus on the higher-middle to lower-high market segments, and consider organic fabrics and special (customised) designs.
- Consider working together with producers of complementary spa and wellness products, to create a more coherent collection.
- Use natural colours and patterns that resemble nature to give your duvet covers and bedspreads a natural look. Consider using elegant materials and designs to target the mid to high end of the market.
- 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 sustainability

European consumers and designers increasingly strive to minimise any negative environmental effects of their consumption and production. They are shifting their preferences towards more sustainable choices. This is driving producers of bed textiles towards sustainable raw materials and production techniques.

Materials like organic cotton, hemp and bamboo are trendy for bed textiles. Ramie and soy silk are popular for duvet covers as well. In addition to using sustainably produced fibres, decreasing or eliminating the chemicals used in turning the fibre into yarn is essential.

Social and environmental responsibility is an increasingly important aspect of the mid-high to high-end market segment. Using and promoting natural materials or recycled fibres is a key way to meet this demand, as well as obtaining certification. Other options include sustainable production, biodegradable end products, more effective packing and transport, and operating in a transparent way. Transparency in how you work, also in relation to your employees, will help to convince buyers that you could be a suitable partner.

Figure 5: URBANARA – Ethically produced bed textiles of natural materials

Source: URBANARA @ YouTube

The COVID-19 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 that both consumers and companies improve their sustainability. In addition, most people want significant change to make the world fairer and more sustainable after COVID-19.

Tips:

- Communicate your use of natural materials, like cotton, bamboo, silk, wool or even cashmere so that buyers are aware of this. You can also use organic cotton or other certification to add further value to your product.
- Look into possibilities to reduce your impact on the environment, like using natural dyes, dyes with a higher fixation rate, reduced salt use, and machines that use less water for processing. In cotton textile processing, the use of chemicals, water and energy is highest for the dyeing and finishing of the product.
- Emphasise the story behind your product in your promotion strategy.
- For more information, see our special study on sustainability and our webinar on the sustainable transition in apparel and home textiles.

Personalisation

The trend of personalisation remains strong in the textile industry. Duvet covers and bedspreads have an important decorative function that can easily shape the style and the atmosphere of a bedroom. Their designs are very diverse, to match the countless tastes and moods of consumers.

To enable the consumer to further personalise their choice, you can offer diversification within your own range. Working in ‘product-families’ allows for the mixing and matching of different types of bed textiles. Adding decorative cushion covers or throws to your offer is a good option. This will also help your buyer to market your products more easily, by facilitating the creation of a ‘look’ or ‘mood’.

Figure 6: MADE.COM – Children’s bed textiles with matching cushion and rug

Source: MADE.COM @ YouTube

Tips:

- Create your own niche by taking advantage of those aspects of your bedspreads and duvet covers that are different from other (more mainstream) products in the market.
- Work in ‘product-families’ to provide a variety of choices for your consumers.

Co-creation

European buyers are increasingly trying to distinguish themselves from their competitors. To do so, they focus on their own image and design. They look for producers they can cooperate with to develop their own products, so-called ‘co-creation’. This makes it extra important to showcase your special skills, production techniques and the variety of raw materials you work with. In addition to buyers for the consumer market, hotels and spas can also be an interesting target market for customised (colours, logos, etc.) developments.

Tips:

- Make sure your collection showcases the different materials and production techniques you have at your disposal, so that potential partners see what you can offer.
- Consider targeting the spa and hotel market by directly offering your services in customised developments. These buyers increasingly visit the same (online) trade fairs as those in the regular home textiles market. However, you should be aware that the contract market places stricter demands on quality, especially durability, and may demand higher volumes.
- Also consider targeting bigger (high-end) spas and hotels in your own domestic or regional market.

Smaller quantities and shorter lead times

European buyers change their collections increasingly often. As a result, they are looking for shorter lead times and lower minimum orders. This is a distinct advantage for small to medium-sized producers, since they are generally more flexible and able to supply smaller quantities than larger manufacturers.

Tip:

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

Example company:

The Shopis a company from India focusing on hand crafted textiles using traditional techniques in a contemporary manner. Working with craft communities, they aim to provide an alternative for products made in bulk. They also take the environment into consideration by using solar heating, harvesting rainwater and properly taking care of the effluents that result from production. In the company’s marketing and promotion, their ecologically responsible production combined with the use of traditional skills is one of the main focal points.

This study was carried out on behalf of CBI by Globally Cool B.V. in collaboration with Remco Kemper.