

The European market potential for table and kitchen linen

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The COVID-19 pandemic has caused the European market for table and kitchen linen to decline. At the same time, it has led consumers to spend more time cooking and socialising at home, and many plan to continue doing so in the future. This offers you opportunities, as nearly two thirds of European table and kitchen linen imports are sourced directly from developing countries. An increased interest in slow cooking and sustainability are key trends that shape the market for table and kitchen linen. Co-creation, smaller quantities and shorter lead times are in demand among buyers.

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1. Product description

The term 'linen' is used to describe any woven or knitted bath, bed, kitchen or table textile. In this context, the term does not specifically refer to the fabric linen. In Home Decoration and Home Textiles (HDHT), table and kitchen linen are categorised under home textiles.

Kitchen linen includes items like tea and terry towels, potholders and oven mitts. Table linen includes tablecloths, table runners, tablemats, placemats and napkins. These items can be sold individually or in matching sets. Combinations of kitchen and table linen in sets are also available. Some suppliers offer even broader home textile ranges in matching designs for the kitchen and dining room, which include not only kitchen and table linen, but also products like ready-made curtains and/or cushion covers.

This study uses the following codes to indicate trade in table and kitchen linen:

Table 1: Product codes for table and kitchen linen

Harmonised System (HS)	Prodcom	Description
6302 40	13 92 13 30	Table linen, knitted or crocheted
6302 51	13 92 13 53	Table linen of cotton

6302 53	13 92 13 59	Table linen of man-made fibres (excluding knitted or crocheted)
	13 92 13 70	
6302 59 10	13 92 13 55	Table linen of flax
6302 59 90		Table linen of other textile materials (excluding man-made fibres)
6302 60	13 92 14 30	Kitchen linen and toilet linen of terry towelling or similar terry fabrics of cotton
6302 91		Kitchen linen and toilet linen of cotton
6302 93	13 92 14 70	Kitchen linen and toilet linen of man-made fibres
6302 99 10	13 92 14 50	Kitchen linen and toilet linen of flax
6302 99 90		Kitchen linen and toilet linen of other textile materials (excluding man-made fibres)

Functionality

Table and kitchen linen has different functions, both protective and decorative. It is used to protect against stains, to clean surfaces, to protect the hands from hot pots and pans, and as part of the decoration of the kitchen and dining room. When various pieces match in style, they provide a quick and inexpensive way to decorate the kitchen and dining room with a consistent look.

Material

Table and kitchen linen is usually woven. The fabric should be washable at fairly hot temperatures (60-90°C) to remove stains, without shrinking or fading. Cotton is by far the most used material for table and kitchen linen. Other natural fibres include linen, bamboo, hemp or banana fibre. Blended yarns or mixed fabrics are also an option. Blended yarns are usually a combination of cotton with natural fibres such as linen or man-made fibres such as polyester. In the low-end market segment you can even find table linen made of 100% polyester.

Design

Table and kitchen linen is available in a variety of designs and colours. Different patterns can be woven into or printed on it. Table and kitchen linen usually comes in sets with matching styles. Some producers match the design of their table linen and kitchen linen ranges, to provide a consistent decorative style for the kitchen and dining room.

Tablecloths can be made out of single pieces of fabric or designed with borders. There is a range of possibilities when it comes to possible accessories and embellishments, ranging from laces and tapes at the borders to embroidery and tassels at the corners. In the high-end segment, designs tend to be simple and sophisticated, deriving their value from the high quality of the material and the overall finish.

Figure 1: Tea towels with simple designs



Source: [Unsplash](#)

Size

Sizes for table linen vary widely depending on the type of product. Common standard sizes in cm are:

- placemats: 30x45, 35x50 or 45x35
- runners: 35x130, 35x90, 45x150, 50x160
- napkins: 40x40, 45x45, 50x50
- tablecloths and covers: 90x90, 100x100, 120x120, 150x150, 150x225, 150x250, 150x300

Tablecloths can also be round (ø 100-150cm), although this may result in a lot of production waste.

Sizes for kitchen linen vary widely depending on the type of product. Common standard sizes for tea towels are 50x70cm and 60x45cm.

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

2. What makes Europe an interesting market for table and kitchen linen?

Before the COVID-19 pandemic, the European market for table and kitchen linen was stable. Almost two thirds of the import value is sourced directly from developing countries, making Europe an interesting market for you.

Between 2016 and 2019, European imports of table and kitchen linen were fairly stable at around €2.5 billion. In 2020 however, the [outbreak of the coronavirus](#) (COVID-19) led to a -14% decrease. This added up to an average annual decrease of -3.2% over the period from 2016 to 2020.

Nearly two thirds of the total European table and kitchen linen import value was sourced directly from developing countries. Because of this, these imports showed a similar pattern to the overall imports, being relatively stable until 2019 and then dropping. Nevertheless, Europe is 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. At the same time, lockdowns have resulted in an increase in home cooking and dining. This may partly or fully offset the negative effects on the market. For more drivers of demand, see 'which trends offer opportunities?' below.

Tip:

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

3. Which European countries offer most opportunities for table

and kitchen linen?

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

Germany is Europe's leading importer of table and kitchen linen, with around 19% of imports. The United Kingdom and France follow with 13% and 11% respectively. Together, these countries account for more than 40% of the European total. Smaller markets with a share of less than 10%, but still in the top six of leading importing countries, are the Netherlands (8.5%), Italy (6.8%) and Spain (5.6%).

However, you should be aware that in the European market, countries have different roles. A rough distinction can be made between countries that are mainly importers and countries that are mainly manufacturers. Most Western European importers not only sell their products in their own country, but also distribute them across Europe. This explains why in HDHT, imports into small countries like Denmark and the Netherlands often far exceed the demand in their own domestic market.

In terms of marketing, you need to realise 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 table and kitchen linen](#)). 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 with the importers and distributors in that segment, instead of a specific country. These distributors will then sell your products in that segment across Europe.

Real private consumption expenditure

Real private consumption expenditure is an important indicator for growth in demand. The HDHT sector, which includes the table and kitchen linen market, is sensitive to economic cycles. When economic circumstances and prospects are poor, consumers postpone buying non-essential items. Conversely, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products tend to increase.

Until the outbreak of the COVID-19 pandemic, the leading European markets showed an annual growth in real private consumption expenditure of around 1-3%. Due to the pandemic, this trend was reversed in 2020. However, because the 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 into 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 has forecast [Germany to be the first major European economy to recover from the current crisis](#). This is 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 likewise projects [German GDP to be back at pre-COVID-19 level at the turn of 2021/2022](#).

In 2019, German table and kitchen linen imports stabilised at €450 million. In 2020, they decreased by -7.0%, a considerably smaller decrease than the European average. This added up to an average annual decrease of -2.4% over the period from 2016 to 2020.

Germany sources about two thirds of its import value directly from developing countries, which matches the average for Europe. These imports decreased by -3.4% between 2016 and 2020, to €263 million. However, most of this decline was due to a drop in imports from Turkey, the leading exporter of table and kitchen linen to Germany. The performance of other developing countries varied. Bangladesh jumps out, with an impressive average annual growth of 11% over this period, including 35%(!) in 2020.

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

France's economy is set to recover in 2022

French imports of table and kitchen linen peaked at €376 million in 2018. In 2020, they fell by -17% to €293 million. This added up to an average annual decrease of -4.5% over the period from 2016 to 2020.

Between 2016 and 2019, France's table and kitchen linen imports from developing countries increased at an average annual rate of 5.3%. In 2020 however, they fell by -17% to €162 million. This translates to a 55% market share, which is below the European average. China is the leading exporter of table and kitchen linen to France with 18% of imports. Turkey and Belgium follow with 13% and 12% respectively.

Economic growth in France had already slowed down before plummeting to -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 during the first half of 2022](#), slightly ahead of the European average. This could make France an interesting market for you.

Brexit may boost direct trade with the United Kingdom

British table and kitchen linen imports also decreased in 2020, by an extraordinary -24%. This added up to an average annual decrease of -7.1% between 2016 and 2020.

The United Kingdom sourced 89% of its €248 million worth of imports directly from developing countries, which is their largest market share in Europe. The main exporters of table and kitchen linen to the UK are Pakistan and India, with 30% and 26% of UK imports respectively. In 2020, Pakistan became the leading exporter, overtaking India by achieving a smaller decrease. Turkey and China each accounted for 13% of British imports.

[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 lead to British buyers importing more items 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 devaluation of the British pound since the Brexit referendum has also made 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 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

The Netherlands is the only leading table and kitchen linen importer that managed to achieve a net growth of imports between 2016 and 2020. Despite a relatively modest decline of -5.0% in 2020, Dutch imports increased at an average annual rate of 1.1% over this period. In 2020, the Netherlands imported €192 million worth of table and kitchen linen. 80% of this was directly sourced from developing countries, which is well above the European average.

The main exporters of table and kitchen linen to the Netherlands are Pakistan and China, with 29% and 16% of Dutch imports respectively, followed by Turkey and India with 13% each. The performance of other developing countries varied. Most notably, Egypt achieved a 9.5% increase between 2016 and 2020.

[Dutch GDP is projected to return to 2019-levels at the end of 2022](#), lagging slightly behind the European average. As well as the COVID-19 pandemic, Brexit and international trade disputes between the United States

and China and between the United States 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 table and kitchen linen.

Since the Netherlands is a big re-exporter of goods, the impact on the imports of HDHT products goes beyond the country itself. Developments in other European countries will also play a role, making total Dutch imports difficult to predict. However, its large import market for developing countries continues to make the Netherlands a relatively interesting market for you.

Italy is expected to recover particularly slowly

Being particularly affected by the pandemic, Italy experienced a GDP decline of -8.8% in 2020. [Italian GDP is not projected to reach its 2019-level in by the end of 2022](#), as the Italian economy is still forecast to have slowest recovery in Europe. 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 table and kitchen linen imports. After some slight fluctuations, they fell by -24% in 2020. The decrease from €210 million in 2016 to €154 million in 2020 added up to an average annual decrease of -7.5%. Direct imports from developing countries made up around 80% of the market and consequently followed a similar pattern. They fell from €139 million to €106 million in 2020.

Turkey and China are the leading exporters of table and kitchen linen to Italy, with market shares of 20% and 16% respectively. Developing countries generally faced strongly declining exports to Italy, which indicates that prospects on this market are likely to be limited in the coming years.

The economy in Spain is also expected to struggle

Like Italy, Spain was hit hard by the COVID-19 pandemic. After peaking in 2017, Spanish table and kitchen linen imports plummeted by -29% in 2020, to a low of €126 million. This added up to an average annual decrease of -9.5% since 2016. In 2020, Spain sourced around 60% of its imports directly from developing countries, representing an import value of €76 million.

Pakistan is the leading exporter of table and kitchen linen to Spain, with an import market share of 18%. Neighbouring country Portugal – formerly Spain's main supplier – follows with 17%, after overtaking China (15%) by achieving a smaller decrease in 2020.

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 not expected before 2023](#), which is considerable later than the European average. This will obviously limit your opportunities in Spain in 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 or pose threats on the European table and kitchen linen market?

The market for table and kitchen linen is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. We will outline the main developments below, starting with the potential effects of the COVID-19

pandemic on the HDHT market.

COVID-19 and trends in HDHT and table and kitchen linen

An expected outcome after the COVID-19 crisis 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 level of concern about this is expressed by consumer confidence, which continues to be relatively low. This makes consumers reluctant to spend on anything beyond food, cleaning products, and other household essentials.

However, the pandemic has boosted consumer interest in some areas, such as:

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

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

- a reappreciation of their homes and the desire to make their home more pleasant, practical and comfortable overall
- bringing the outdoors inside and vice versa
- removing clutter

These trends are partly a continuation of consumer trends that were already ongoing, some of which may have been accelerated. In addition, the pandemic has demonstrated the fragile balance on this planet. As such, it is another important demonstration of the fact that we need to produce more sustainably, taking care of our resources, our people and the planet in general. These developments underline the importance of the existing trends of wellness and sustainability in the table and kitchen linen market.

Slow cooking and dining

A key trend in the HDHT sector is the increased interest in 'slow' cooking and (social) dining. This involves preparing healthy meals and taking the time to sit and enjoy dinner with family and friends, boosting physical and mental wellness. This has become particularly relevant as [the COVID-19 crisis has made consumers more acutely aware of the importance of both their mental and physical wellness](#). It also relates to the 'home sweet home' trend, where consumers try to make the home a place where they genuinely connect with family and friends.

Due to the pandemic [people are spending more time cooking and socialising as a family/household](#), and many plan to keep doing so in the future. This development is particularly prominent in younger generations, as older consumers probably already spent more time on these activities before the lockdowns. Such a long-term increase could further boost consumers' interest in various types of table and kitchen linen, to help prepare meals and set a well-laid table that adds to the social experience of dinners.

Figure 5: Table setting with a mix and match combination of a jute table runner and cotton napkins



Source: [Unsplash](#)

Tips:

Follow trends in food, cooking and dining. You can do this by following food-oriented trade fairs such as [Anuga](#) or [Biofach](#), viewing [cooking programmes](#) and reading [magazines](#) on the subject. When developing ranges, also consider adding products like cushion covers and seat pads as

matching items.

See our article on how [the COVID-19 crisis 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. Their preferences are shifting towards more sustainable choices. This is triggering producers of table and kitchen linen to shift towards sustainable raw materials and techniques, like organic cotton, linen (made from flax), bamboo, hemp, banana fibre and (more) eco-friendly dyes. In addition to using sustainably produced fibres, decreasing or eliminating the chemicals used in turning the fibre into yarn is essential.

Figure 6: Linen napkins



Source: [Unsplash](#)

Another aspect of sustainability is durability. Due to its primary function of protecting and drying kitchenware, kitchen linen is washed frequently. At the same time, consumers are choosing to buy fewer but better quality products. As a result, durable fabrics are popular for kitchen linen, as they offer consumers an environmentally friendly and economical option.

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 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.

The COVID-19 pandemic has further underlined the importance of this trend. For most consumers (particularly the younger generations), [the COVID-19 crisis 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 sustainable materials, such as organic cotton, linen, bamboo, hemp or banana fibre, so that buyers are aware of this. You can also use certification to add further value to your product.

Use durable materials like cotton for kitchen towels, and linen or cotton for tea towels.

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](#).

Co-creation

European buyers are increasingly trying to stand out from their competitors by focusing on their own image and design. To this end, they look for producers they can cooperate with to develop their own products; this is known as 'co-creation'. With co-creation, it is 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 can also be an interesting target market for customised developments (colours, logos, etc.).

Tips:

Make sure your collection showcases the different materials and production techniques you have to offer.

Consider targeting the 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. Also consider directly targeting hotels in your domestic and regional markets.

Smaller quantities and shorter lead times

European buyers change their collections increasingly often. They also try to minimise the risk of being overstocked. 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 like you, since you are more flexible and can generally supply smaller quantities than larger producers.

Tip:

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

Example of company:

[Malaika](#), based in Egypt, is an example of a company that has successfully tapped into some of the above-mentioned trends. The company offers hand-embroidered and hand-printed table linen and many other home textiles in Egyptian cotton and linen. They strive to improve the economic position of women and their families by teaching women these valuable skills and allowing them to work from home. Malaika also offers a bespoke design service for products with different dimensions or completely new designs.

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

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