

The European market potential for table and kitchen linen

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The European market for table and kitchen linen is growing, with over two-thirds of imports coming directly from developing countries. Since the COVID-19 pandemic has led consumers to spend more time cooking and socialising at home, many plan to continue doing so in the future. This offers you opportunities. An increased interest in slow cooking, wellness and sustainability are key trends that shape the market for table and kitchen linen. Co-creation (the ability to customise) and range development are in demand among buyers.

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1. Product description

The term ‘linen’ (or ‘linens’) is used to describe any woven or knitted bath, bed, kitchen or table textiles. In this context, it does not specifically refer to flax-based [linen fabric](#).

In Home Decoration and Home Textiles (HDHT), there are several [categories consisting of various product groups](#). 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 even offer broader home textile ranges in matching designs for the kitchen and dining room, which also include 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)	Description
6302 40	Table linen, knitted or crocheted
6302 51	Table linen of cotton

6302 53	Table linen of man-made fibres (excluding knitted or crocheted)
6302 59	Table linen of other natural textile materials (including flax)
6302 60	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	Kitchen linen and toilet linen of man-made fibres
6302 99	Kitchen linen and toilet linen of other natural textile materials (including flax)

Functionality

Table and kitchen linens have different functions, both protective and decorative. Consumers use them to protect against stains, clean surfaces, protect their hands from hot pots and pans, and decorate 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 linens are 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.

Placemats and, to a lesser degree, table runners are also often made of grasses or other natural fibres like jute or palm fibre. There are different techniques to work with these fibres, such as braiding, weaving and machine-stitching.

Design

Table and kitchen linens are available in a variety of designs and colours. Different patterns can be woven into or printed on them. They usually come in matching sets with styles. Some producers offer broader ranges of table and kitchen linen with matching designs, 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: Liviza – Placemats with shell decorations

Source: [Liviza @ YouTube](#)

Size

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

- Placemats: 30x45, 35x50 or 45x35;
- Runners: 35x130, 35x90, 45x150, 50x160;
- Napkins: 40x40, 45x45, 50x50;
- Tea towels: 50x70, 60x45; and
- 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.

Other sizes are 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?

European imports of table and kitchen linen have recovered from their pandemic-related dip of 2020, particularly those coming directly from developing countries. Over two-thirds of the import value comes directly from developing countries.

Source: UN Comtrade

European imports of table and kitchen linen grew from €2.5 billion in 2018 to €2.8 billion in 2022, at an average annual rate (CAGR) of 3.4%. Similarly, worldwide table and kitchen linen imports grew from €6.6 billion to €7.4 billion. This means Europe accounts for about 38% of the global imports.

Over two-thirds of Europe's import value came directly from developing countries. These imports grew from €1.8 billion in 2018 to €2.0 billion in 2022 (CAGR 3.2%). Altogether this makes Europe an interesting market for you as an exporter from a developing country.

The COVID-19 pandemic and the war in Ukraine have disrupted international trade, affecting the costs and availability of raw materials, energy and transport. At the same time, lockdowns have led to a rising interest in home cooking and dining. This may (at least partially) compensate for the pressure that the [cost of living crisis](#) puts on consumer spending. For more drivers of demand, see the section on [trends](#).

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 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 therefore is to focus on a particular segment, rather than a specific country.

Source: UN Comtrade

In 2022, Germany remained Europe's leading importer of table and kitchen linen, with around 18% of imports. France and the UK follow with 14% and 11% respectively. Together, these countries account for over 40% of the European total. Smaller markets with a share of less than 10%, but still in the top-6 of leading importing countries, are Italy (8.5%), Spain (7.5%) and the Netherlands (7.0%).

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 don't just sell their products in their own country, they 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 (see our [study on market entry for table and kitchen linen](#)). 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 with importers in that segment. These importers will then sell your products in that segment across Europe.

Consumer spending under pressure

Table and kitchen linen 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 ensuing energy crisis. Although it has improved since then, consumer confidence still scores below its long-term average. This may well lead to lower spending.

Source: OECD

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 this trend. In 2021, growth bounced back into positive figures.

*Forecasts for 2024-2025 are modest, reflecting consumer confidence. In line with this, [about half of respondents indicated they intended to lower their spending on home and furniture products](#) in an Autumn 2022 European consumer survey. This continued in 2023, when [60-66% claimed to 'trade down' when shopping for home and furniture items](#) – for example by shopping around for the best deals. At the same time, 14% intended to splurge on home decoration, suggesting they may save up first so they can spend more later.

Germany is Europe's largest importer

Germany is Europe's leading importer of table and kitchen linen. The country's large domestic market, role as a trade hub, and relatively high imports of these product groups from developing countries make it an interesting market for you.

Germany's imports grew from €450 million in 2018 to €510 million in 2022 (CAGR 3.2%). This was mainly due to a relatively small drop in 2020 and strong growth in 2021 and 2022. Germany's role as a key trade hub in Europe may have helped the country boost its performance.

The direct import market share for developing countries grew from 78% in 2018 to 83% in 2022, which is among the largest in Europe. These imports grew from €349 million in 2018 to €424 million in 2022 (CAGR 5.0%). Germany's main table and kitchen linen suppliers are Türkiye (26% in 2022), China (22%), Pakistan (18%) and India (14%). Bangladesh and Egypt follow (7.2% and 3.2%, respectively). Bangladesh's performance jumps out with an impressive CAGR of 21% for 2018-2022.

France's imports from developing countries are bouncing back

In 2020, France turned to European trade hubs like Belgium, the Netherlands and Germany for its imports of table and kitchen linens. This may have been an effect of the international trade disruptions after the outbreak of the COVID-19 pandemic. France increased its imports from developing countries again in 2021 and 2022.

The country's table and kitchen linen imports grew from €366 million in 2018 to €405 million in 2022 (CAGR 2.6%). This included particularly strong growth in 2021 and 2022.

France's imports from developing countries are recovering from their 2020 dip. With strong growth in 2021 and 2022, they returned to €245 million. Developing countries' direct import market share reached 60% in 2022. This continues to be below the European average but is a considerable improvement. Leading suppliers are China (17% in 2022), Türkiye (14%), Pakistan (14%), India (12%) and Belgium (12%). Tunisia (3.3%) is coming back strong after a 2020 drop.

Brexit may boost direct trade with the United Kingdom

The UK could well offer you opportunities, with high imports from developing countries and a potentially increased interest in direct sourcing. [Brexit](#) – the country's withdrawal from the European Union (EU) – has led to relatively low consumer confidence levels since 2016. At the same time, it 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 EU's single market.

The UK's table and kitchen linen imports grew from €299 million in 2018 to €311 million in 2022, at a CAGR of 1.0%. Developing countries' direct market share grew from 87% in 2018 to 91% in 2022, the largest in Europe. The UK's main table and kitchen linen suppliers in 2022 were Pakistan (33%), India (27%), China (18%), Türkiye (11%) and Bangladesh (4.8%).

Italy's imports recover from dip

Italy could offer you opportunities, considering the strong recovery of its table and kitchen linen imports. Being particularly affected by the pandemic, Italy experienced a GDP drop of -8.8% in 2020. The hit to Italy's economy is reflected in the country's table and kitchen linen imports. After some slight fluctuations, they fell by -22% in 2020. An extraordinary 45% growth in 2021 led to an overall increase from €208 million in 2018 to €242 million in 2022. This translates into a CAGR of 3.9%.

Direct imports from developing countries made up around two-thirds of the market, matching the European average. They grew from €147 million in 2018 to €163 million in 2022 (CAGR 2.5%). Italy's leading table and kitchen linen suppliers are Pakistan (24% in 2022), Türkiye (16%), China (15%), Portugal (10%) and India (10%).

Spain's imports perform well after largest European drop

Spain may offer you opportunities after being hit hard by the COVID-19 pandemic. In 2020, the Spanish economy experienced the largest decline in Europe, with a GDP drop of -11%. The country's table and kitchen linen imports plummeted by -29% in 2020 – the largest decline in Europe – but came back strong in 2021 and 2022. As a result, they grew from €187 million in 2018 to €213 million in 2022 (CAGR 3.3%).

Developing countries' direct market share fluctuated around 72%, matching the European average. Spain's main table and kitchen linen suppliers are Pakistan (28% in 2022), Portugal (21%) and China (18%), followed by Türkiye (9.2%), India (7.4%), Bangladesh (4.8%) and Morocco (3.9%).

The Netherlands is an important European trade hub

The Netherlands is an important European trade hub, with a fast-growing import market for table and kitchen linen from developing countries. This could make the Dutch market an interesting one for you.

Dutch imports grew from €159 million in 2018 to €199 million in 2022 (CAGR 5.7%). This was mainly due to a relatively small drop in 2020 followed by strong growth. Developing countries' direct market share grew from 74% in 2018 to 81% in 2022, among the largest in Europe. These imports grew from €118 million in 2018 to €162 million in 2022, with a strong CAGR of 8.3%. Leading suppliers are Pakistan (36% in 2022), Türkiye (17%), India (14%) and China (12%). Egypt (5.1%) and Bangladesh (3.3%) also performed well.

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.

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 in 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. Key topics are slow cooking and dining (related to 'home sweet home'), wellness and sustainability.

Home sweet home: 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. As such, slow cooking and dining is part of the 'home sweet home' trend, where consumers try to make the home a place where they genuinely connect with family and friends.

During the pandemic, [people spent more time cooking and socialising as a family/household](#). Many expect this to be a permanent change: of those who started cooking more at the beginning of the pandemic, [65% were still doing so a year on](#). Now, due to the current cost-of-living crisis, [44% plan on cooking at home more](#). 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.

Tips:

Follow trends in food, cooking and dining. You can do this by following food-oriented trade fairs such as [Anuga](#) or [Biofach](#), watching [cooking shows](#) 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 pandemic boosted the importance of the wellness trend in HDHT](#) for more information.

Wellness: In search of nature

Wellness is a dominant consumer trend. European consumers are constantly trying to improve themselves, in both body and mind. [Two-thirds of consumers are more conscious of looking after their physical/mental health](#) than they were before the pandemic. In fact, [over 67% of people worldwide say they make wellbeing a top priority](#). At the same time, 44% feel it is impossible to achieve and only 12% say they think their level of wellbeing is where it should be.

A key part of the wellness trend involves urban consumers getting in touch with nature, both inside and outside the home. Closeness to nature makes them feel healthier, more relaxed, and less concerned about the environment.

Sparked by this trend, the garden has become an extension of the home, looking like part of the living room as the lines between the indoor and outdoor areas of the home are blurring. This inspires designers to merge outdoor imagery with indoor decoration. Flower and leaf patterns, green colours and print combinations that relate to natural habitats are popular. Using natural materials also fits well with this trend. You can also link to it by adopting a similar approach for table linen for outdoor use.

Figure 5: IKEA – Dining with friends

Source: [IKEA Canada @ YouTube](#)

Tips:

Offer table and kitchen linen with a natural look by using natural colours and patterns that resemble nature.

Use natural materials, such as cotton, linen or bamboo.

Sustainability: People and planet

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. 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 \(very\) 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](#) and [Gen Z](#) will soon be the dominant generation of consumers. They care about sustainability and express this by buying products that contribute to a better world and from companies that do the same. This is triggering producers of table and kitchen linen to shift towards sustainable techniques and raw materials 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.

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. This makes durable fabrics for kitchen linen a popular choice, as they offer consumers an environmentally friendly and economical option.

Social and environmental responsibility are increasingly important in 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 transparently. Transparency in how you work, also in relation to your employees, will help to convince buyers that you could be a suitable partner.

European Green Deal: upcoming sustainability legislation

The [European Green Deal](#) also provides a legal aspect to social and environmental sustainability. The European Commission has started working on various proposals for new and updated green and social legislation. Particularly relevant proposals for the table and kitchen linen industry include:

- [Corporate Sustainability Due Diligence Directive](#)
- [Forced Labour Regulation](#)
- [Green Claims Directive](#)
- [Packaging and Packaging Waste Regulation](#)

Well-known sustainable initiatives (like [BSCI](#), [ETI](#), [Sedex](#) or the [WFTO Guarantee System](#)) and certifications (like [GOTS](#) or OEKO-TEX [Made in Green](#)) can help you prove your sustainability to buyers and consumers.

Tips:

Use recycled or sustainably produced natural materials, such as organic cotton, linen, bamboo, hemp or banana fibre. Use durable materials like cotton for kitchen towels and linen or cotton for tea towels.

Look into other ways to reduce your impact on the environment, for example in your production or transport. Think of options 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.

Clearly communicate your specific sustainable values and practices. Also emphasise the story behind your product in your promotion strategy.

If your buyer is interested, consider certification. For more information on this and the upcoming EU sustainability legislation, see our [studies on market entry for table and kitchen linen](#) and [buyer requirements for HDHT](#).

For more information, see our special [study on sustainability in HDHT](#), our [tips to go green](#) and [tips to become 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](#).

Co-creation and range development

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 with elements like company colours and logos.

More and more buyers are selling concepts rather than single products to their clients, especially in the middle-high segment. They do this for marketing and positioning purposes, to broaden their range and to push their sales. To benefit from this trend you can sell your table and kitchen linen as part of a wider range of similar products, including different materials and techniques. Combinations with matching products like cushion covers and seat pads are also a possibility.

Tips:

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

If you produce other decorative home textiles like cushion covers, offer them in a range with matching table and kitchen linen.

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.

Example company

Egypt's [Malaika](#) is a women-founded company that offers hand-embroidered and hand-printed table linen and other home textiles in Egyptian cotton and linen. They strive to improve the economic position of women and their families by teaching women valuable skills and allowing them to work from home. Their designs are inspired by Egypt's rich history and culture. Malaika also offers a bespoke design service for products with different dimensions or completely new designs.

In 2018, Malaika founded [Threads of Hope](#) (ToH) Cairo, a for-profit social enterprise whose primary goal is to produce sustainable work for marginalised women, both locals and refugees. Its goal is to expand the reach of Malaika's embroidery training programme and give trainees an opportunity to work with other brands. ToH also provides initiatives such as psychotherapy, literacy courses and childcare. Organisations currently participating in the programme include the [UNHCR](#), [Alfanar](#), [Save the Children](#) and the [IOM](#).

[Globally Cool B.V.](#) carried out this study in partnership with Remco Kemper on behalf of CBI.

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