

# The European market potential for plant pots

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Europe is an interesting market for your plant pots. During the period 2018–2022, imports of the product groups that include these pots have grown at an average annual rate of 9.5%. About three quarters of these imports came directly from developing countries. Consumers use plants to make their homes and outdoor spaces cosier, as well as to feel close to nature. Plants also have a positive effect for those who, work from home, and pots play an important role in this regard. As gardens and balconies become extensions of the home, coherent collections of plant pots for inside and outside the house offer opportunities. Sustainability is another key trend.

## Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for plant pots?](#)
3. [Which European countries offer the most opportunities for plant pots?](#)
4. [Which trends offer opportunities on the European market for plant pots?](#)

## 1. Product description

Plant pots (or planters) are used to display and cultivate flowers, plants and vegetables. European consumers use them inside the home, in the garden, on the porch or front steps, and on the balcony or rooftop.

The market for Home Decoration and Home Textiles (HDHT) comprises several [categories of product groups](#). Plant pots are usually categorised as home accessories. As such, they are grouped with such items as statuettes and figurines, wall decoration, candles and candle holders.

This study uses the codes presented in the following table to indicate trade in plant pots.

Because no specific trade data are available for plant pots, these codes cover various related HS codes for decorative objects and basketry in general.

Table 1: Product codes for plant pots

Harmonised System (HS)	Description
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3926 40	Statuettes and other ornaments, made of plastic
4420 10*	Statuettes and other ornaments, made of wood (excluding wood marquetry and inlaid wood)
4420 11**	Statuettes and other ornaments, made of tropical wood (excluding wood marquetry and inlaid wood)
4420 19**	Statuettes and other ornaments, made of wood (excluding tropical wood, wood marquetry and inlaid wood)
4602 11	Basketwork, wickerwork and other articles, made directly to shape from bamboo plaiting materials
4602 12	Basketwork, wickerwork and other articles, made directly to shape from rattan plaiting materials
4602 19	Basketwork, wickerwork and other articles, made directly to shape from other vegetable plaiting materials
4602 90	Basketwork, wickerwork and other articles, made directly to shape from non-vegetable plaiting materials
6913 10	Statuettes and other ornamental ceramic articles, made of porcelain or china, not elsewhere specified
6913 90	Statuettes and other ornamental ceramic articles, not elsewhere specified (excluding porcelain or china)
8306 21	Statuettes and other ornaments, of base metal, plated with precious metal (excluding works of art, collectors' pieces and antiques)
8306 29	Statuettes and other ornaments, of base metal, not plated with precious metal (excluding works of art, collectors' pieces and antiques)

\* 2018-2021

\*\* 2022

## Functionality

Depending on the type of plant to be kept in them, plant pots need to allow effective water circulation to keep the plants healthy and the soil nutritious. They must be able to hold water. For glazed ceramics, such water resistance is a given. Other materials (for example, wood or basketry) may require an inner coating, container or waterproof lining. Pots should also provide enough space to ensure proper airflow for the plant's roots.

## Material

Plant pots come in a variety of materials, including terracotta, plastic, wood, stone, metal and biodegradable materials (including weaving materials). Recycled materials (for example, ceramics or plastics) are also an option. Each material creates a different look, feel and customer appeal. Plant pots should be easy to carry and move around, which makes lightweight materials a popular option. They can be produced industrially, by hand or with the help of simple machinery.

## Design

Design features (for example, shape and decoration) are important. In many cases, the choice of raw materials and the ways that they have been used in production provide a distinctive look on their own. Although oval/round shapes are the most common, square and other shapes are used as well, depending on style (for example, expressive or minimalist).

These pots are generally sold within competitive, price-sensitive segments. They should therefore be able to be packed as efficiently as possible, so that as many as possible will fit in a container. For example, conical shapes allow pots to be stacked, and sets of different sizes can be nested together.

## Durability

Plant pots for outdoor use must be able to withstand weather conditions, ranging from bright sunshine to rain and snow. Wooden containers may need annual treatment with preservatives or stains in order to retain their appearance and prevent deterioration.

## 2. What makes Europe an interesting market for plant pots?

European imports of the product groups that include plant pots have grown considerably, especially those coming directly from developing countries. These products play a role in key sector trends, including 'home sweet home' and wellness. This may keep consumers interested when spending is under pressure.

Because no specific trade data are available for plant pots, these statistics cover various related HS codes for decorative objects and basketry in general.

Source: UN Comtrade

European imports of the product groups that include plant pots grew from €2.7 billion in 2018 to €3.9 billion in 2022, at an average annual rate (CAGR) of 9.5%. About three quarters of these imports came directly from developing countries, having grown from €2.0 billion in 2018 to €3.0 billion in 2022, at a CAGR of 11%. Taken together, these developments make Europe an interesting market for you, as an exporter from a developing country.

The effects of the COVID-19 pandemic and the war in Ukraine have disrupted international trade. At the same time, lockdowns drew increased focus towards the home and trends like 'home sweet home' and wellness. Plant pots are well suited to these trends, due to their decorative value, their ability to bring nature into the home and the popularity of flowers as a gift. This could at least partially compensate for the pressure that the **'cost-of-living crisis'** is exerting on consumer spending. For information on other factors that are driving demand, see 'Which trends offer opportunities?'

## Tip:

Be prepared for potential future trade disruptions. See our [study on how to respond to COVID-19](#) for information on how to prepare your business for the future.

### 3. Which European countries offer the most opportunities for plant pots?

The larger Western European economies are the main importers of plant pots. Given that importers in these countries generally sell their products across Europe, however, your best strategy would be to focus on particular segments, rather than specific countries.

Source: UN Comtrade

In 2022, Germany remained Europe's leading importer of the product groups that include plant pots, accounting for 22% of these imports. It was followed by the Netherlands (13%), France (12%) and the United Kingdom (UK) (11%). Smaller markets with shares less than 10%, but still in the 6 leading importing countries, are Italy (5.6%) and Spain (5.1%).

#### 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 sell their products only in their own countries, but distribute them across the continent. It is for this reason that small countries (for example, the Netherlands) often import a much greater volume of HDHT products than they consume.

In terms of marketing, you should be aware that countries are not markets. The HDHT market consists of several different segments, ranging from low-end to high-end (see our study on [market entry for plant pots](#)). Every European country has these segments, although their size may vary. It therefore makes much more sense to focus on segments within which your product group falls and connect to importers within those segments. These importers will then sell your products within those segments across Europe.

#### Consumer spending is under pressure

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

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the subsequent energy crisis. This reflected a large drop in the expectations of households concerning the general economic situation in their country, as well as about their own future financial situation. Consumer intentions to make major purchases also fell. This lower consumer confidence may well lead to lower spending, as reflected in the modest forecasts for 2023/2024.

Source: OECD

\* forecasts

Before the COVID-19 pandemic, consumer spending ('private consumption expenditures') in the leading European markets grew by about 1-3% per year. This trend was broken in 2020, due to the pandemic. In 2021, growth rebounded to positive figures. Forecasts for 2023/2024 are modest, in line with consumer confidence.

## **Germany is the largest European importer**

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

Germany's imports grew from €591 million in 2018 to €859 million in 2022, with a CAGR of 9.8%. This was due primarily to strong growth in 2021 and 2022. Germany's role as a key trade hub in Europe may have helped boost the country's performance.

Most (80-90%) of Germany's import value came directly from developing countries. This is one of the largest market shares in Europe. These imports grew from €485 million in 2018 to €753 million in 2022, with a strong CAGR of 12%. In 2022, China was Germany's main supplier of the product groups that include plant pots, accounting for about two thirds of these imports. China was followed by Vietnam (6.8%) and India (5.8%).

## **The Netherlands is an important European trade hub**

The Netherlands is an important European trade hub, with a rapidly growing import market for the product groups that include plant pots. This could make the country an interesting market for you.

Dutch imports grew from €334 million in 2018 to €459 million in 2022, with a CAGR of 10%. Growth was particularly strong in 2021. About 80% of these imports came directly from developing countries, which is well above the European average. Imports from developing countries grew from €266 million in 2018 to €391 million in 2022, with a CAGR of 10%. In 2022, the leading suppliers were China (60%) and Germany (10%), followed by India (6.2%), Indonesia (5.4%) and Vietnam (4.5%). These 3 developing countries are quickly increasing their supplies.

Given that the Netherlands is heavily dependent on international trade, Brexit and international trade disputes could potentially have a major impact on the country. For this reason, Dutch imports are difficult to predict.

## **France increases its imports from developing countries**

France increased its imports from developing countries again in 2021/2022, after having turned to European trade hubs (for example, the Netherlands, Germany and Belgium) in 2020 and 2021. This may have been an effect of the international trade disruptions following the outbreak of the COVID-19 pandemic.

The country's imports grew from €315 million in 2018 to €492 million in 2022, with a CAGR of 12%. These figures included strong growth in 2021 and 2022. The direct import-market share for developing countries returned to 63% in 2022, which continues to be below the European average. These imports grew at a CAGR of 8.8%, having increased from €211 million in 2018 to €309 million in 2022. In 2022, the leading suppliers were China (44%), the Netherlands (11%) and Vietnam (10%).

## **Brexit may stimulate direct trade with the United Kingdom**

The United Kingdom is likely to offer opportunities, considering its high level of imports from developing countries and its potentially increased interest in direct sourcing. [The United Kingdom's withdrawal from the](#)

**European Union** (Brexit) has been accompanied by relatively low levels of consumer confidence since 2016. At the same time, Brexit may lead British buyers to increase their direct imports from developing countries, rather than from European importers. This could allow them to avoid additional fees now that they are no longer part of the European Union's (EU) single market.

British imports grew from €322 million in 2018 to €452 million in 2022, with a CAGR of 8.8%. The direct import-market share for developing countries grew from 77% to 87%. This is one of the largest market shares in Europe. In 2022, China was the leading supplier, accounting for about two thirds of these imports. China was followed by Vietnam (4.5%) and India (3.3%).

## Italy performs well in 2021 and 2022

Italy could offer opportunities, given its strong performance in 2021 and 2022, which led to an overall increase in imports from €153 million in 2018 to €220 million in 2022. This translates to a CAGR of 9.4%.

Direct imports from developing countries made up about 3 quarters of the market, which is comparable to the European average. These imports grew from €118 million in 2018 to €166 million in 2022. China and Vietnam are Italy's leading suppliers, with 54% and 10%, respectively, in 2022.

## Spain increases its imports despite economic struggles

Spain is the sixth-largest European import market for the product groups that include plant pots. The country's imports of these product groups are performing well. After falling by an extraordinary -28% in 2020, strong performance in 2021 and 2022 led to an overall increase from €147 million in 2018 to €201 million and 2022, at a CAGR of 8.2%. In 2022, 82% of these imports came directly from developing countries, which is above the European average. Spain's leading suppliers are China (57% in 2022) and Vietnam (8.3%).

### Tip:

Do not restrict your focus to specific European countries. Instead, identify the appropriate market segment for your products, and have your buyers distribute them across Europe within this segment.

## 4. Which trends offer opportunities on the European market for plant pots?

The market for plant pots is shaped by various trends, many of which are related to **trends for HDHT** at the sector level. Key topics include sustainability, 'home sweet home' and wellness.

### Sustainability: Consumers want products that are sustainably made

Social and environmental sustainability are quickly becoming part of the core needs of consumers, including with regard to HDHT. European consumers are increasingly adopting more sustainable lifestyles. This trend was boosted by the COVID-19 pandemic. At the same time, the current cost-of-living crisis is driving a need for sustainable products to be affordable.

Especially for younger generations, **the pandemic made it more important for consumers and companies to improve their sustainability**. An impressive **86% of all European consumers consider sustainability either important or very important**, and 29% buy sustainable products deliberately and consciously. In addition, **most people want significant change to make the world fairer and more sustainable in the wake of COVID-19**. **Millennials** and **Gen Z** people will soon be the dominant generation of consumers. They care about sustainability

and express this by buying products (from companies) that contribute to a better world.

Plant pots and planters are well-suited to this trend, given their ability to create a greater appreciation of nature and a more modest, focused lifestyle.

For plant pots, key topics regarding social and environmental sustainability include the following:

- Materials: Are your materials renewable? Are they traceable and traded responsibly?
- Production process: Does production take place in a safe, healthy manner? Are your labour contracts fair? Can you reduce your energy use? Can you prevent water, air and soil pollution? Can you reuse waste, either inside the production system or elsewhere? In general, can you ensure low-impact production?
- Transport: Do you use clean transport options? Do you pack containers effectively? Are your packing materials recyclable?

For plant pots, sustainability has many aspects. With regard to the use of materials, there are many options based on the recycling of post-industrial or post-consumer waste. These options range from the reuse of glass rejects by glass factories to the manufacturing of plant pots from recycled plastics. Potentially damaging materials (for example, plastic) can also be replaced by 'new plastics' that are made from eco-friendly materials. With regard to production, industries are trying to become carbon-free and reduce their use of energy.

Figure 4: D&M DECO - Plant pots made of recycled ceramics

Source: [D&M DECO @ YouTube](#)

In terms of transport, product design is increasingly considering the fact that the environmental 'footprint' of products can be reduced by fitting more items into a container. With regard to marketing, brands in the upper half of the market tend to emphasise the environmental benefits of timeless design, as opposed to the [throw-away society](#). They urge consumers to select items more carefully and enjoy them longer. Environmental benefits can also be realised by reconverting more items into new materials at the end of their lifecycle.

These approaches are often practised by 'Big Industry' in the mechanised mass-production segments. Producing more sustainably is also helping to reduce costs and enhance general efficiency, Sustainability can thus add to profitability as well.

Handmade items are also increasingly being perceived as more sustainable, as this mode of production tends to be small scale, requiring less energy and generating less pollution. Plant pots that have been made by hand (for example, hand-thrown stoneware) also often preserve elements of traditional culture. This is regarded as contributing to social sustainability, and consumers are likely to perceive them as more honest and authentic. Social concepts based on women's empowerment and diversity are popular, especially amongst younger consumers. For this reason, small-scale producers are also playing a role in the market for sustainable plant pots.

Figure 5: IKEA – Plant pots and baskets made by hand, in collaboration with social entrepreneurs

Source: [IKEA @ YouTube](#)

## Tips

Use sustainable solutions for raw materials, production, transport and distribution, consumer use and waste disposal.

Add a touch of your local context or culture to your plant pots to enhance their decorative value.

If your products have a unique origin and/or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to your concept, as well as to that of your importer.

Consider sustainable certification options (for example, fair trade or [BSCI](#) compliance). For more information on this, see our [study on market entry for plant pots](#) and [our study on buyer requirements for HDHT](#) products.



See our special [study on sustainability in HDHT](#) for more information, as well as our [webinar on sustainability in the European HDHT market](#).

## ‘Home sweet home’: Plants make the home cosier

In this trend, the home functions as a shelter for consumers, who tend to be slightly older (for example, [baby boomers](#)). These consumers are transforming their homes into a retreat with a comfortable, quite luxurious interior. One core aspect of the ‘home sweet home’ trend is the notion of ‘cocooning’: the need that people have to surround themselves with the things and people they love. The trend thus also involves families and friends enjoying each other’s company, entertaining each other, cooking and dining, or just relaxing. These aspects of indoor living were strengthened by the COVID-19 pandemic.

Plants play a key role in making the home cosy. Their pots can contribute to the atmosphere as well through various design elements, including like shape, colour, texture and dimension. This also applies to the garden and balcony, which have become an extension of the home. Consumers are now decorating their outdoor spaces in styles that extend their indoor style. Now that many people are working from home, plants can also be a welcome addition to the home office.

### Tips:

Offer styles with a historical, retro touch to tap into the ‘home sweet home’ trend.

Create coherent collections of plant pots for inside and outside the house.

Select your market segments carefully, as older ‘home-as-a-shelter’ consumers are less price-sensitive than younger consumers are.

To reach the younger consumer groups, target importing wholesalers and retailers with a strong online presence.

## Wellness: Closer to nature

Today’s consumers are actively in search of well-being, especially since [the COVID-19 pandemic, which made them more acutely aware of the importance of both their mental and physical wellness](#). The pandemic also made [consumers realise how plants can make their home more pleasant](#). More consumers are enjoying decorating their gardens and balconies with garden plants. In a 2021 survey, 27% of all responding consumers reported having [bought plants more often because they were at home more](#).

Feeling close to nature helps people feel healthy and invigorated. Consumers have an increasing need to be surrounded by nature. Houseplants are popular, especially evergreen and hardy plants with strong sculptural forms that require a minimal amount of care. Consumers use them to create gardens inside their homes. For the home office, a green environment is recommended as a way to stimulate productivity. [Most people, and especially Millennials, feel that plants have a positive effect when working from home](#).

Consumers also enjoy their outdoor spaces — eating, drinking, relaxing and entertaining outdoors — and they are decorating these spaces accordingly. Millions of Europeans have their own garden, balcony or patio. Plant pots have an important role to play within this context. They add instant nature and decoration, and they allow

consumers to grow both ornamental plants and herbs or vegetables. For example, in addition to relaxing and entertaining, **68% of French people with a garden also use it to eat differently.**

The popularity of plant pots is increasing along with the popularity of plants. Large pots are placed on the floor and clustered to create mini-forests. Windowsills are filled with pots, as are kitchens, bathrooms, studies and bedrooms. Urban consumers also keep plants in spaces like balcony gardens, square-foot gardens, instant gardens and mini-conservatories. The need to feel closer to nature has also sparked interest in natural materials (for example, wood, stone or terracotta).

### **Tips:**

To allow consumers to be in contact with nature, use natural materials whenever possible. You could also apply floral decorations, but you should avoid coating or varnishing your garden pot surfaces with synthetics.

Extend your collections to include both indoor and outdoor pots. Create solutions for all areas and applications (for example, hanging pots for the kitchen and mini-conservatories for the balcony).

Accompany your garden (and other) pots with tips about gardening, growing your own food or the creation and maintenance of an indoor garden.

### **Example company**

The Brazilian plant-pot exporter **Vasart** offers a broad range of design options in lightweight indoor and outdoor planters. Their unique selling point is product innovation. They 'believe in the spirit of sustainable innovation by offering products that can improve the quality of people's lives, creating or expanding their contact with nature'.

Figure 6: The story of Vasart

Source: [Vasart @ YouTube](#)

The company uses recycled raw materials in all its products, which can be recycled again after use. They have already recovered more than 3,000 tonnes of plastic and transformed it into new products. For example, Vasart has partnered with Plataforma Circular and Therpol to develop a collection of circular pots produced with biotechnology and denim fabric fibres combined with polyethylene.

[Globally Cool B.V.](#) carried out this study in collaboration with GO! GoodOpportunity on behalf of CBI.

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