

The European market potential for cushion covers

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Around 60% of European imports of textile furnishings, including cushion covers, comes from developing countries. This makes Europe an interesting market for you. Good ways to add value to your product include focusing on design, craftsmanship, sustainability and the story behind your product. Creating cushion covers as part of a wider range of similar products or in combination with bedspreads and throws also offers opportunities. In addition, offering co-creation can give you a competitive edge.

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1. Product description

In Home Decoration and Home Textiles (HDHT), there are several [categories consisting of various product groups](#). Cushion covers are categorised under home textiles. A cushion cover is a fabric case that covers cushions. Besides protecting cushions, cushion covers mainly function as decoration. They provide an inexpensive way for consumers to express their personal style, both in the living room and as decoration in the bedroom.

This study uses the following codes to indicate trade in cushion covers:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
6304 91		Other textile furnishing articles, knitted or crocheted
6304 92		Other textile furnishing articles, of cotton, not knitted or crocheted, of cotton
6304 93		Other textile furnishing articles, not knitted or crocheted, of synthetic fibres

6304 99		Other textile furnishing articles, not knitted or crocheted, of other (non-synthetic) materials
	13 92 16 60	Other textile furnishing articles

Functionality

Cushion covers mainly serve as decoration for the sofa, couch and bed. They are not intended as pillowcases for the pillows you sleep on.

Material

Cushion covers are available in a wide variety of fabrics. Common natural materials for cushion covers include cotton, linen, wool, silk, jute and leather. Other options include recycled or leftover fabrics, blended yarns or mixed (manmade) fibres, for example the [handmade cushion covers from upcycled vintage silk saris](#) from Doing Goods

Size

Sizes of cushion covers vary, matching the sizes of the cushions. The most common sizes on the European market are:

- 40 x 40 cm;
- 40 x 65 cm;
- 45 x 45 cm;
- 50 x 30 cm;
- 50 x 50 cm; and
- 65 x 65 cm.

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

Design

Cushion covers come in a variety of designs, depending on their origin and the targeted market segment. Various cushion shapes are available in Europe, including round, heart-shaped and cylindrical ‘bolster’ cushions.

2. What makes Europe an interesting market for cushion covers?

The European market for textile furnishings has grown in recent years. About two-thirds of the imports come directly from developing countries, making Europe an interesting market for you.

(!) Because no specific trade data are available for cushion covers, these statistics cover textile furnishing articles.

Source: UN Comtrade

Between 2017 and 2021, European imports of textile furnishing articles were fairly stable at about €1 billion. After a -12% dip in 2020, they returned to almost their pre-pandemic levels in 2021. However, some of the 2021 imports may be delayed shipments carried over from 2020. Worldwide textile furnishing imports showed a similar pattern, reaching €2.3 billion in 2021. This means the European market accounts for about 40% of the total worldwide textile furnishing imports.

Around two-thirds of the total European textile furnishing imports came directly from developing countries. These imports reached €643 million in 2021, after a -15% dip to €569 million in 2020. This makes Europe an interesting market for you, as an exporter from a developing country.

The COVID-19 pandemic and the war in Ukraine continue to disrupt international trade. At the same time, people are focusing more on the home, and trends like sustainability and wellness due to the lockdowns. This may partially (or fully) compensate for the negative effects of the cost-of-living crisis. For more drivers of demand, see 'which trends offer opportunities?' below.

Tip:

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

3. Which European countries offer most opportunities for cushion covers?

The larger Western European economies are the main importers of textile furnishing articles. 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

Germany is Europe's leading importer of textile furnishings with 18% of imports, followed by France (14%) and the United Kingdom (12%). Together they accounted for more than half of the European total. Spain (7.4%), the Netherlands (7.1%) and Poland (6.6%) complete the top six of leading importing countries. All these markets performed well in 2021, except for Spain. However, some of those 2021 imports may be delayed shipments carried over from 2020. Whether new patterns from 2021 are here to stay, is not yet clear.

Focus on segments

Be aware that European countries have different roles on the market. Some are mainly importers and others 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 they consume.

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 (see our study on [market entry](#) for cushion covers). Every European country has these segments, although their size may vary per country. Therefore, it makes much more sense for you to select a segment in your product group and connect to the importers and distributors in that segment, instead of in a specific country. These distributors will then sell in that segment across Europe.

Consumer spending and confidence are under pressure

Because of the COVID-19 pandemic and the war in Ukraine, consumer spending and confidence are under pressure. This could lead to lower demand for HDHT products.

The HDHT sector is 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.

Source: OECD

Until the outbreak of COVID-19, the leading European markets showed an annual growth in consumer spending ('real private consumption expenditure') of around 1-3%. Due to the pandemic, this trend broke in 2020. In 2021, growth bounced back into positive figures.

In December 2021 the forecasts for 2022 and 2023 were also positive, particularly for 2022. However, in March 2022 European [consumer confidence fell sharply](#) due to the situation in Ukraine and the following energy crisis. This reflected a large drop in households' faith in the general economic situation in their country, and their own future financial situation. Consumers' intent to make major purchases also fell. This lower consumer confidence may well lead to lower spending.

Germany is the largest European importer

Germany is the largest economy in Europe, home to nearly a fifth of the European Union's population. [German GDP was back at pre-COVID-19 levels](#) in the second quarter of 2022. This is somewhat behind most other Northern and Western European countries, whose economies recovered in 2021.

Germany became the leading European importer of textile furnishings again in 2019, after being overtaken by Spain in 2016. This was mainly due to Spain's falling imports, as German imports were relatively stable at about €170 million between 2017 and 2021.

About 80% of Germany's textile furnishing imports come directly from developing countries, which is above the European average. These imports were also fairly stable at about €135 million. China (50%) and India (15%) are Germany's leading suppliers. Poland (7.6%), Turkey (4.5%), Pakistan (3.6%) and Bangladesh (3.3%) follow.

Germany's large domestic market, role as a European trade hub, and relatively high textile furnishing imports from developing countries make this an interesting market for you. To differentiate from China's mass production, you should add value to your products to target the mid- to high-end market. For example, by focusing on design, craftsmanship, sustainability and storytelling.

France increases its intra-European imports

French imports of textile furnishings grew from €90 million in 2017 to €137 million in 2021, at an average annual rate of 11%. The 2021 imports may include some delayed shipments, as they followed a dip of -8.0% in 2020.

The imports from developing countries show a similar pattern, reaching €96 million in 2021 following an average annual growth of 7.6%. They added up to a 70% direct import market share, which is about average for Europe, but smaller than the 79% share in 2017. This is due to a strong increase in imports from European countries like Germany in response to pandemic-related trade disruptions in 2020. China (23%) and Tunisia (19%) remain France's leading suppliers, followed by Turkey (14%) and India (12%).

Economic growth in France had already slowed down before dropping to -8.3% in 2020 due to the pandemic. Global uncertainties and the effects of social unrest weighed on consumer confidence and affected the

consumption of non-essential products. However, the French GDP returned to its pre-pandemic level in 2021. Considering the country's growing market for developing countries, this suggests France could offer you opportunities.

Brexit may promote direct trade with the United Kingdom

Even before the COVID-19 pandemic, British textile furnishing imports were fluctuating. In 2020 they dropped by -17%, before recovering strongly with a 31% growth to reach €113 million in 2021. However, the 2021 imports probably include some delayed shipments. Similarly, textile furnishing imports from developing countries reached €98 million in 2021. This translated to a direct import market share of 86%, up from 79% in 2017. The United Kingdom sourced most of this from China (62%) and India (16%).

The United Kingdom's withdrawal from the European Union ([Brexit](#)) has led to relatively low consumer confidence 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 [British GDP decreased by -9.9% in 2020](#), a record decline. Like in most Northern and Western European countries, the [British economy returned to pre-pandemic levels in 2021](#). Considering the country's high imports from developing countries and the potential increased interest in direct sourcing, the United Kingdom could well offer you opportunities.

Spain faces economic struggles

In 2016, Spain overtook Germany to become the leading European importer of textile furnishings. Since then, Spain's textile furnishing imports have steadily declined. In 2020 and 2021, they fell sharply by more than -30% per year. They reached €72 million in 2021, after an average annual decline of -22% since 2017.

This drop is due to a fall in supplies from leading supplier Morocco, from €159 million in 2017 to just €22 million in 2021. Most of Spain's smaller suppliers actually increased their exports in this period. As a result of Morocco's performance, the direct import market share for developing countries dropped from 97% to 89%. Nevertheless, this is the highest share in Europe. Morocco (31%) continues to be Spain's leading supplier, followed by China (25%) and Turkey (20%).

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 in the second half of 2023, making the Spanish economy the slowest to recover in Europe. This, of course, could limit your opportunities in Spain for the coming years.

The Netherlands is an important European trade hub

With a relatively strong average annual growth of 5.2%, Dutch imports of textile furnishings grew from €57 million in 2017 to €69 million in 2021. Imports from developing countries grew from €35 million to €37 million, representing a relatively low direct market share of 53% in 2021. China (33%) is the Netherlands' leading supplier of textile furnishings, followed by Germany (20%), Poland (16%) and India (11%).

Like in other Western European markets, Dutch GDP was back at 2019-levels in 2021. Brexit and various international trade disputes may have a big impact on the Netherlands, since the country heavily depends on international trade. Because developments in other European countries play a key role, Dutch imports are difficult to predict. However, its function as a European trade hub could make the Netherlands an interesting market for you.

Poland is a quickly emerging import market

Poland's import of textile furnishings grew from €47 million in 2017 to €64 million in 2021, at an average annual

rate of 8.1%. This makes Poland the only leading market whose textile furniture imports grew in 2020, despite trade disruptions. The direct import market share for developing countries surged from 66% to 76%, which is above the European average. In 2021 these imports reached €49 million. China (43%) is Poland's leading supplier, followed by Germany (15%) and Tunisia (12%).

After nearly three decades of continued economic growth, the Polish economy declined by a relatively slight -2.7% in 2020. After that, the Polish GDP was among the first in Europe to recover. As the Polish market matures, it may be an interesting market for you.

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 cushion cover market?

The market for cushion covers 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 effects of the COVID-19 pandemic on the HDHT market.

COVID-19's effect on trends in HDHT

The COVID-19 pandemic has increased the focus on the home. Areas such as wellness and working from home have become hot topics since lockdown measures were introduced.

Spending a lot of time at home has also motivated consumers to:

- Make their homes more pleasant, practical and comfortable;
- Merge the outdoors and indoors;
- Declutter; and
- Care about sustainability.

These are mainly consumer trends that were already ongoing and have been accelerated.

Sustainability: natural materials

European consumers and designers are making more and more sustainable choices, especially in the mid-high to high-end market segments. They are increasingly aware of and concerned about the negative impacts of production and consumption. This is driving the popularity of sustainability labels and commitments in the textile industry.

The COVID-19 pandemic has boosted this trend. For most (especially the younger generations), the 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.

For cushion covers, using natural materials from sustainable sources as your main raw material fits in well with the sustainability trend. This can include sustainable raw materials like organic cotton, wool and silk, as well as relatively 'new' fibres like bamboo and hemp. Another option is to use recycled fabrics/fibres or leftovers from the production of other textile products. Natural dyes add an extra sustainable feature to your cushion covers.

An example are Weaver Greens's [handloomed recycled plastic cushion covers for indoor and outdoor use](#).

Other ways to become more sustainable include environmentally and socially responsible production, as well as more efficient packing and transport. Certification – such as fair trade or organic materials – can also add value your product.

Tips:

Use sustainably produced natural, recycled or leftover materials and natural dyes for your cushion covers. Especially when you target the higher segments.

Invest in sustainable production, packaging and transport methods.

If your importer is interested, consider certification options such as fair trade or organic. For more information, see our studies about [market entry for cushion covers](#) and [buyer requirements for HDHT](#).

Promote the sustainable aspects of your cushion covers as a premium.

See our special study on [sustainability in HDHT](#) for more information, as well as our webinars on [sustainability in the European HDHT market](#) and [the sustainable transition in apparel and home textiles](#).

Wellness: a natural look

European consumers are constantly trying to improve themselves, both in body and mind. Two-thirds of consumers are more conscious of [looking after their physical/mental health](#) than they were before the pandemic. In a 2021 global Young Living survey, 48% of respondents report they are making [wellness and self-care a top priority](#). The home plays an important role in this. In a 2021 Life at Home survey, 40% of respondents who felt more positive about their home also saw a [positive impact on their mental health](#).

A key part of this 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. 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. The need to connect with nature also fits well with the previously discussed trend of using natural materials.

Tips:

Offer cushion covers with a natural look by using natural colours and patterns that resemble nature.

Use elegant materials and designs, especially when you target the higher ends of the market.

Traditional craftsmanship and design

Ethnic motifs and traditional craftsmanship are popular trends in the European market for cushion covers. Consumers are interested in the story behind the product, which adds to its uniqueness. [Kilim cushion covers](#) are a successful example of the influence of tradition. Handwoven and made of wool, these Turkish cushion covers are a unique product with a story.

Use local materials, techniques and designs in your products. Show your craftsmanship by using intricate weaves, patterns or shapes. This adds a background story to your product. For example, see [Couleur Locale](#)'s collection of kilim cushion covers in various motifs and materials.

Use storytelling in your promotion strategy. Make sure your product's unique story comes across clearly to the consumer, for example by including a card that describes it.

Consider experimenting with your traditional designs, reinventing them in a more contemporary manner.

Co-creation and range development

European buyers are increasingly trying to stand out from their competitors and mainly do so by focusing on their own image and design. They look for producers to cooperate with to develop their own products; this is called co-creation. This makes it extra important to showcase your special skills, production techniques and the variety of raw materials you work with.

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, and to push their sales. To benefit from this trend you can sell your cushion covers as part of a wider range of similar products, including different materials and techniques. Combinations with matching bedspreads and throws are also a possibility. Their design could be similar to your cushion covers, but you can also look at complementary designs and materials.

Tips:

Develop a small range of cushion covers with a similar look and style, using different techniques and materials.

If you produce other decorative home textiles like bedspreads and throws, offer matching cushion covers.

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

Smaller quantities and shorter lead times

European buyers change their collections at an increasing pace. 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 bigger producers.

Tip:

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

Example company

[RASA Jaipur](#) from India is an example of a company that has successfully tapped into these trends. They specialise in handmade textiles, using traditional crafts such as block printing and embroidery. The company employs several hundred local craftspeople and artisans, most of whom are women. RASA Jaipur works as sustainably as possible, for instance by recycling all the water used in the production process. The way they compose their ranges shows a mix of different products and materials. A good example is their collection of cushion covers and bedlinen.

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

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