

# The European market potential for vases

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Europe is an interesting market for your vases. Imports of the product groups that include vases have grown considerably in recent years, especially those coming directly from developing countries. Demand is driven by consumers' need to bring nature into their home, as well as the continued popularity of flowers as a gift. The pandemic has also made consumers realise how flowers make their home more pleasant. Sustainability is another key trend, which you can tap into by using (renewable) natural or recycled materials for your vases.

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## 1. Product description

In Home Decoration and Home Textiles (HDHT), there are several [categories consisting of various product groups](#). Vases are usually categorised as home accessories. They are generally used to hold (cut or artificial) flowers, but can also be purely decorative. As such, they are grouped with items such as statuettes and figurines, wall decoration, candles and candle holders.

This study uses the following codes to indicate trade in vases:

Table 1: Product codes for vases

Harmonised System (HS)	Description
3926 40	Statuettes and other ornaments, of plastics
4420 10*	Statuettes and other ornaments, of wood (excluding wood marquetry and inlaid wood)
4420 11**	Statuettes and other ornaments, of tropical wood (excluding wood marquetry and inlaid wood)
4420 19**	Statuettes and other ornaments, of wood (excluding of tropical wood, and wood marquetry and inlaid wood)

6913 10	Statuettes and other ornamental ceramic articles of porcelain or china, not elsewhere specified
6913 90	Statuettes and other ornamental ceramic articles, not elsewhere specified (excluding of porcelain or china)
6914 10	Ceramic articles of porcelain or china, not elsewhere specified
6914 90	Ceramic articles not elsewhere specified (excluding of porcelain or china)
7013 41	Glassware of lead crystal, of a kind used for table or kitchen purposes, gathered by hand (excluding articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013 42	Glassware for table or kitchen purposes of glass having a linear coefficient of expansion $\leq 5 \times 10^{-6}$ per kelvin within a temperature range of 0°C to 300°C (excluding glassware of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013 49	Glassware of a kind used for table or kitchen purposes, gathered by hand (excluding toughened glass and glass having a linear coefficient of expansion $\leq 5 \times 10^{-6}$ per kelvin within a temperature range of 0 to 300°C, glassware of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)
7013 91	Glassware of lead crystal, of a kind used for toilet, office, indoor decoration or similar purposes, gathered by hand (excluding glassware of a kind used for table or kitchen purposes, drinking glasses, articles of heading 7018, mirrors, leaded lights and the like, lighting fittings and parts thereof, atomisers for perfume and the like)
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

Because no specific trade data are available for vases, these codes cover various related HS-codes for decorative objects and glassware in general.

## Functionality

Vases that display cut flowers must be able to hold water. For glazed ceramics and glass, this water resistance is a given. Other materials like wood or paper may need an inner coating or glass container. Vases used for artificial flowers or purely decorative purposes do not have to be water-resistant. Vases for outdoor use generally need to be light and durable.

## Design

The vase has become a valued home accessory, rather than a purely functional item that holds water for flowers. It also has added emotional value; vases are now seen as an accessory that adds to the style of the consumer's interior. They need to appeal to different market segments, with different requirements in terms of shape and decoration. As such, they can range from everyday basics to status symbols. Generally, levels of innovation rise as the segments move up.

Shapes can vary according to consumer taste. They also depend on whether vases are designed to hold bunches or single flowers. Over the years, vases have evolved from conventional cylinder or belly shapes to more expressive and innovative designs.

## Material

Vases come in a wide variety of materials, from natural materials (such as ceramics, glass, metal, wood and paper), to recycled materials, to synthetic materials, to even textile fabrics. They can be produced industrially, by hand, or with the help of simple power tools.

Glass and ceramic vases are the most common. However, varying consumer preferences and the need for design flexibility stimulate the use of different materials. Each material creates a different look, feel and customer appeal.

## 2. What makes Europe an interesting market for vases?

Vases play a role in key sector trends like home sweet home and wellness. European imports of the product groups that include vases have grown considerably, especially those coming directly from developing countries.

Because no specific trade data are available for vases, these statistics cover various related HS-codes for decorative objects and glassware in general.

Source: UN Comtrade

European imports of the product groups that include vases grew from €3.4 billion in 2018 to €4.6 billion in 2022, at an average annual rate (CAGR) of 7.9%. In 2022, they represented 58% of worldwide imports.

More than half of the import value came directly from developing countries. These imports grew from €1.9 billion in 2018 to €2.8 billion in 2022, at a CAGR of 10%. Altogether, this makes 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 have led to an increased focus on the home and trends like home sweet home and wellness. Vases fit in well with this through their decorative value, their ability to bring nature into the home, and the popularity of flowers as a gift. This may (partially) compensate for the pressure that the so-called [cost of living crisis](#) puts on consumer spending. For more drivers of demand, see the paragraphs about 'What 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 future-proof your business.

## 3. Which European countries offer most opportunities for vases?

The larger Western European economies are the main importers of vases. 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 the product groups that include vases with 21% of imports. The Netherlands followed with 13%, France with 12%, and the United Kingdom with 11%. Smaller markets with a share of less than 10%, but still in the top six leading importing countries, are Italy (6.2%) and Poland (4.8%).

### 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 just sell their products in their own country, but they 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 vases](#)). 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 to importers in that segment. These importers will then sell your products in that segment across Europe.

## Consumer spending is under pressure

Vase 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 subsequent energy crisis. This reflected a large drop in households’ expectations about 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, which is reflected in modest forecasts for 2023/2024.

Source: OECD

\* forecasts

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 with this trend. In 2021, growth bounced back into positive figures. Forecasts for 2023/2024 are modest, in line with consumer confidence.

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

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

Germany's imports grew from €692 million in 2018 to €961 million in 2022, with a CAGR of 8.5%. This was mainly due to strong growth in 2021 and 2022. Germany's role as a key trade hub in Europe may have helped the country boost its performance.

About three-quarters of Germany's import value came directly from developing countries, which is among the largest market shares in Europe. These imports grew from €478 million in 2018 to €725 million in 2022, with a strong CAGR of 11%. China is Germany's main supplier of the product groups that include vases, with more than half of the imports. India (5.2% in 2022), the Netherlands (4.3%) and France (4.1%) follow.

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

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

Dutch imports grew from €371 million in 2018 to €592 million in 2022, with a CAGR of 12%. Growth was particularly strong in 2021 and 2022. About two-thirds of this came directly from developing countries, which is well above the European average. These imports grew from €246 million in 2018 to €389 million in 2022, with a CAGR of 12%. China (52% in 2022) and Germany (15%) are the leading suppliers, followed by India (5.0%). Countries like Vietnam (3.4%) and Indonesia (2.3%) are quickly increasing their supplies.

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.

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

France turned to European trade hubs like Germany and the Netherlands in 2020 and 2021. 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 2022.

The country's imports grew from €378 million in 2018 to €535 million in 2022, with a CAGR of 9.1%. This included particularly strong growth in 2021. The direct import market share of developing countries returned to 52% in 2022, which is comparable to the European average. These imports grew at a CAGR of 7.4%, from €207 million in 2018 to €276 million in 2022. Leading suppliers are China (40% in 2022) and the Netherlands (13%).

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

The United Kingdom could well offer you opportunities, considering the country's high imports from developing countries and potentially increased interest in direct sourcing. [The United Kingdom's withdrawal from the European Union](#) (Brexit) has led to relatively low consumer confidence levels since 2016. At the same time, Brexit may result in British buyers importing more directly from developing countries, rather than from European importers. This allows them to avoid additional fees now that they are no longer part of the European

Union's single market.

British imports grew from €383 million in 2018 to €523 million in 2022, with a CAGR of 8.1%. About three-quarters of these imports came directly from developing countries, which is among the largest market shares in Europe. China is the leading supplier, with more than half of the imports. Vietnam (6.7% in 2022) and France (5.3%) follow.

### Italy's imports recover from dip

Italy could offer opportunities, considering the recovery of its imports of the product groups that include vases. Being particularly affected by the pandemic, Italy experienced a GDP drop of 8.8% in 2020. The country's imports were already in decline, before falling by an extraordinary 15% in 2020. However, strong performances in 2021 and 2022 led to an overall increase from €217 million in 2018 to €286 million in 2022. This translates to a CAGR of 7.2%.

Direct imports from developing countries made up about half of the market, which is comparable to the European average. They grew from €111 million in 2018 to €158 million in 2022. China (42% in 2022), France (13%) and Spain (11%) are Italy's leading suppliers.

### Poland is an emerging market

Poland's growing imports have made the country the 6<sup>th</sup> largest European importer of the product groups that include vases. They increased from €146 million in 2018 to €223 million in 2022, with a CAGR of 11%.

About two-thirds of these imports came directly from developing countries, which is well above the European average. They grew from €92 million in 2018 to €151 million in 2022, with a CAGR of 13%. Poland's leading suppliers are China (60% in 2022) and Germany (12%), the country's neighbour and an important European trade hub.

#### 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 on the European market for vases?

The market for vases is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. Key topics are sustainability, home sweet home, wellness and playfulness.

### Sustainability: the people and planet-friendly vase

Social and environmental sustainability are quickly becoming part of the core consumer needs, also in HDHT. European consumers are increasingly adopting more sustainable lifestyles. The COVID-19 pandemic has boosted this trend. At the same time, the current cost-of-living crisis drives the need for sustainable products to be affordable.

Especially for younger generations, the pandemic has made it more important that consumers and [companies 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](#) 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.

In vases, sustainability has many aspects. At the level of material use, there are lots of options based on recycling post-industrial or post-consumer waste. This can go from glass factories re-using their glass rejects, to vases made from recycled plastics. Potentially damaging materials such as plastic can also be replaced by 'new plastics' made from eco-friendly materials. At production level, industries are trying to become carbon-free and reduce their use of energy.

When it comes to transport, product design increasingly takes into account the fact that the more items fit into a container, the lower the environmental 'footprint'. At marketing level, brands in the upper half of the market discuss the environmental benefits of timeless design, against the [throw-away society](#). They urge the consumer to select an item more carefully and enjoy it longer. If more items can be reconverted into new materials at the end of their lifecycle, the environment also benefits.

These approaches are often practised by big industry in the mechanised mass segments. By producing more sustainably, they are also cutting costs and generally becoming more efficient. Thus, sustainability can add to profitability as well.

Handmade is also increasingly seen as more sustainable because it often means small-scale production, meaning less energy and pollution. Vases that were made by hand, such as hand-thrown stoneware, also often preserve elements of traditional culture. This is seen as contributing to social sustainability and, by the consumer, as more honest and authentic. Social concepts based on women's empowerment and diversity are popular, especially among younger consumers. As such, small-scale producers also have their role to play in the market for sustainable vases.

Figure 4: West Elm – traditionally produced recycled glass vases

## 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 vases to add 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, and that of your importer.

If your importer is interested, consider sustainable certification options such as fair trade or [BSCI](#) compliance. For more information on this, see our study about market entry for vases[CM1] and [our study about buyer requirements for HDHT](#).

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

[CM1]@contentmanager CBI – please include a hyperlink to this study when you have published it.

## Home sweet home: vases make the home cosier

In this trend, the home functions as a shelter for a (slightly older, [baby boomer](#)) consumer. This consumer makes the home a retreat with a comfortable, quite luxurious interior. Core to the home sweet home trend is the idea of ‘cocooning’. This represents the need to surround yourself with the things and people you love. As such, the trend is also about families and friends enjoying each other’s company, entertaining each other, cooking and dining, or just relaxing. The COVID-19 pandemic has strengthened these two aspects of inside living.

Within this trend, the emphasis is on the decorative side of the vase: how it can contribute to a homey atmosphere. This can be done by displaying real or artificial flowers, but also by how the vase itself fits into the style of the consumer’s living room. Design elements such as shape, colour, texture and dimension can all support the need of this consumer to create the 2 different moods of this trend: nostalgic and luxurious, or cosy and comfy. The more flexible you are in your materials and techniques, the easier you can cater to this need.

Whether or not you can successfully position yourself in the European market for vases also depends on your ability to match your design capability to your production concept. Broadly speaking, if you are a manufacturer with fairly mechanised processes (for instance in ceramics or glass), this may well place you in the segment of “everyday basics”. This caters to a lower- and lower-middle-end customer base. If your concept is based on handmade items and/or a mix of materials, this may place you in the mid-high segment of this product group. In this case, you need to incorporate innovative design and high-level aesthetics into your products.

Figure 5: Fritz Hansen – blown glass and brass vases



Source: [Fritz Hansen @ YouTube](#)

### **Tips:**

Study the segmentation in the market to discover your niche, for example via physical or online European trade fairs like [Ambiente](#) and [Maison et Objet](#).

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

## **Wellness: say it with flowers**

Today's consumers are actively in search of wellbeing, especially since the COVID-19 pandemic has made consumers more acutely aware of the importance of both their [mental and physical wellness](#). Feeling close to nature helps them feel healthy and invigorated. They use flowers and plants to create a garden inside the home, driving the importance of vases. The pandemic has also made consumers realise how flowers make their [home more pleasant](#). 28% of consumers in a 2021 survey bought flowers more often because they were [at home more](#).

In European culture, flowers are a popular gift, helping people bond with each other. Through their colour and scent, flowers are also an important element in spiritual and physical wellness rituals of yoga and spas. This makes vases an ideal wellness item and gift in their primary function as a container for flowers. A wide variety of design elements are used, depending on the type of customer: bright or muted colours, bold or classic shapes, and different materials and sizes. In yoga and spa settings, the vases usually have a sensitive, quiet style.

The wellness trend is also extending into the office, where more attention is being paid to mental and physical wellbeing too. Flowers and plants serve an important function in creating a happy workplace.

At the interface between the home sweet home and wellness trends, the lines between indoor and outdoor spaces are blurring and the popularity of outdoor vases is growing. Plant pots in any size could already be found in the garden and have been adapted to the indoor style. Now, the outdoor vase is also (re-)appearing, in materials that can withstand various weather conditions and in a style consistent with that of the living room.

### **Tips:**

Use natural materials, colours and finishes, so that the vase itself is reminiscent of nature.

See our webinar on [wellness in HDHT](#) and our article on how [the COVID-19 pandemic boosts the importance of the wellness trend in HDHT](#) for more information.

## **Let's Play: fun in vases**

Playing is a deep human need. It helps us relax, connect with each other, compete, or learn. In times of uncertainty (as with today's global political instability and environmental concerns) our need for optimism, escape and invention is also being realised through play. What is more, playfulness almost comes naturally to the millennial and Gen Z consumer groups.

As a direct opposite to the need for tidying up the house, there is a thriving need for decoration. Especially where it adds fun and playfulness to the interior. So, the same consumer might be decluttering and decorating their home at the same time.

Playful vases often involve:

- figuration (such as animal shapes)
- non-functional materials (such as paper vases)
- bold colours and dimensions
- playful imitations of a cultural or design trend (such as the 1980s '[Memphis](#)' style)
- funny uses of texture (such as fluffy vases)

Figure 6: MOBJE – rearrangeable fabric vases made with traditional hat-making techniques

Source: [MOBJE - YouTube](#)

### **Tips:**

Be aware that humour and light-heartedness is not in everybody's design DNA and can become forced or come across as unauthentic when the style is adopted just because it is a trend.

Play with your own culture by selecting traditional patterns, stories and uses to make a light-hearted statement in vases, but be respectful when you do so. Sharing intercultural jokes can be fun, both to the maker and the consumer, but remind yourself that not everybody shares the same sense of humour.

Imagine you are a child when designing for this trend. Naïve designs, as a child would have created them, often make people smile.

### **Example company:**

Peruvian family business [Raymisa](#) offers a wide range of handmade HDHT products, mixing traditional designs and craftsmanship with modern trends. Their decorative Chulucanas vases are made using a unique technique from the North of Peru with a long cultural tradition of making and using. Originally a social NGO, Raymisa is now a WFTO Fair Trade Guaranteed company working with a network of studios employing artisans from different regions. The company is included in Messe Frankfurt's [Ethical Style Guide](#), allowing buyers looking for sustainable values to source them easily.

Figure 7: Raymisa – Chulucanas pottery

Source: [Raymisa @ YouTube](#)

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

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