

The European market potential for basketry

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The European market for basketry is growing. Most of the imports are sourced from developing countries, making Europe an interesting market for you. The market growth is driven by consumers' need to declutter both their mind and their homes. Demand for natural materials is strong, fitting in with the interest in sustainability. You can further add value to your basketry by using traditional elements, craftsmanship and materials. This also creates a good basis for your storytelling.

Contents of this page

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

1. Product description

In Home Decoration and Home Textiles (HDHT), there are several [categories consisting of various product groups](#). Basketry belongs to the 'storage' category. Baskets are used to put loose items in one place and keep the house tidy. Besides this functional use, baskets have become decorative objects in their own right. Sometimes their decorative value has become even more important than their main storage function. Baskets are also used as packaging for food items; for example, as picnic hampers, as gift baskets and as plant pots.

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

Table 1: Product codes for basketry

Harmonised System (HS)	Prodcom	Description
4602 11	16 29 25 00	Basketwork, wickerwork and other articles, made directly to shape from bamboo plaiting materials
4602 12	16 29 25 00	Basketwork, wickerwork and other articles, made directly to shape from rattan plaiting materials
4602 19 90	16 29 25 00	Basketwork, wickerwork and other articles, made directly to shape from other vegetable plaiting materials

4602 90	16 29 25 00	Basketwork, wickerwork and other articles, made directly to shape from non-vegetable plaiting materials
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Functionality

Baskets are multi-purpose and can store almost any item in the home. Consumers use them to keep rooms tidy, protect items from dust, and/or keep items together. They can be found around the house: in the living room, bed- and bathroom (laundry baskets, for example), kitchen and garden. See an [example of a rattan basket with a playful mushroom design](#) in a children's room from OYOY.

Baskets also have a decorative purpose. As such, functional and decorative baskets can represent different segments. While the focus is on functionality in the low-end market, design and decoration are key in higher-end markets.

Material

Baskets can be made from many different materials, depending on their exact use and origin. Most baskets on the European market consist of natural fibres like bamboo, rattan, grass, wood or paper. Other common materials are metal, all kinds of recycled (and other) plastic, and even textiles. See an [example of a felt basket made with traditional Nepalese techniques](#) from HAY.

Size

Basketry comes in various sizes and shapes, depending on their style and use. For example, laundry baskets have to be relatively large but purely decorative baskets can be smaller.

Design

As a relatively decorative product group, basketry differentiates on design aspects such as:

- Colour;
- Technical mastery, like weaving skills;
- Special materials or material combinations;
- Dimension; and
- Shape

Even the lower-end mass segments are often handmade.

Baskets with a mainly functional purpose are designed to maximise storage space. They should hold as many items as possible, fit into cupboards or under beds, and be stackable. Such baskets are often sturdy, sometimes with an internal frame. Internal lining protects the fibres and prevents contact with the items inside.

Larger baskets can be expensive to ship. They are designed to minimise transport costs by flat-packing, nesting or folding.

Durability

Weaving natural materials is popular, but such technical expertise can also be used on synthetic (manmade) fibres. These materials look like the natural product, but they are durable and resistant to dust, dirt and weather. This is important in the lower-end market, where function and price are key.

Natural materials such as cane, bamboo and most grasses can also be very durable. However, baskets made of natural materials are harder to clean than those made of synthetic fibres.

2. What makes Europe an interesting market for basketry?

The European basketry market has grown in recent years. More than three-quarters of the import value is sourced from developing countries, making Europe an interesting market for you. Most of this imported basketry is made from natural materials.

Source: UN Comtrade

European imports of basketry grew from €496 million in 2017 to €798 million in 2021, at an average annual rate of 13%. This includes a 2.5% growth in 2020, despite the pandemic-related worldwide trade disruptions. In 2021, European basketry imports represented 44% of worldwide imports.

More than 80% of the total European basketry import value was sourced from developing countries. These imports grew from €419 million in 2017 to €648 million in 2021. Altogether this makes Europe an interesting market for you, as an exporter from a developing country.

About 82% of the basketry that Europe imported in 2021 was made from natural materials. 12% of this was bamboo, 17% rattan and 71% “other” natural materials such as sea grass, jute, water hyacinth or abaca.

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 wellness and sustainability due to the lockdowns. Basketry of natural materials fits in well with the sustainability trend. Baskets also help boost consumer wellness, by decluttering both their homes and their minds. This may partially (or fully) compensate for the negative effects of the cost-of-living crisis. For more drivers of demand, see the section below: ‘which trends offer opportunities?’.

Tip:

For more information on the short-term 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 basketry?

The larger Western European economies are the main importers of basketry. 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 2021 Germany remained Europe’s leading basketry importer with 17% of imports, followed by the United Kingdom (15%) and the Netherlands (12%). These countries increased their imports by about 10% in 2020, despite pandemic-related trade disruptions. France (12%), Spain (7.9%) and Poland (5.1%) complete the top six of leading importing countries. All these markets performed well in 2021, but some of those imports may be delayed shipments carried over from 2020. Whether the new trade 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 basketry). 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 energy crisis that followed. 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 and home to nearly a fifth of the European Union's (EU) population. The [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.

German basketry imports grew from €98 million in 2017 to €137 million in 2021, at an average annual rate of 8.7%. This included strong growth rates of 9.8% in 2020 and 24% in 2021. Germany's role as a key trade hub in Europe may have helped the country maintain a strong performance.

Nearly 90% of Germany's import value came directly from developing countries, which is well above the European average. These imports grew from €87 million in 2017 to €119 million in 2021, at an average annual rate of 8.0%. China (48%), Vietnam (25%) and Indonesia (6.8%) are Germany's main basketry suppliers.

Germany's large domestic market, role as a trade hub, and relatively high basketry imports from developing countries make this an interesting market for you.

Brexit may promote direct trade with the United Kingdom

British basketry imports nearly doubled between 2017 and 2021, from €68 million to €123 million. This was mainly due to an impressive 43% growth in 2021. The United Kingdom sourced about 90% of these imports from developing countries, which is considerably above the European average. Most of them come from China.

The United Kingdom's withdrawal from the EU ([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 EU'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.

The Netherlands is an important European trade hub

Dutch basketry imports grew from €60 million in 2017 to €98 million in 2021, at an average rate of 13% per year. This included impressive growth rates of 10% in 2020 and 54% in 2021. Like in Germany, the Netherlands' role as an important European trade hub may have helped the country maintain a strong performance.

The Netherlands sourced nearly 90% of its basketry imports directly from developing countries, which is well above the European average. China (48%), Indonesia (20%), Vietnam (11%) and Bangladesh (7.3%) are the leading suppliers.

Like in other Western European markets, the 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 strong performance as a European trade hub makes the Netherlands an interesting market for you.

France increases its intra-European imports

France managed to keep its basketry imports stable in 2020 and increased them again in 2021. This resulted in €97 million worth of basketry imports in 2021, and an average annual growth rate of 16% between 2017 and 2021.

The direct import market share of developing countries dropped from 90% in 2017 to 70% in 2021, which is relatively low. It seems France has substituted some of its direct imports from developing countries with supplies from European trade hubs like the Netherlands, Belgium and Germany. China (34%), Vietnam (18%) and Madagascar (7.4%) remain France's leading suppliers.

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. Although the French GDP returned to its pre-pandemic level in 2021, the country seems to be shifting its focus towards intra-European trade, possibly limiting opportunities for you to enter the market.

Spain is faced with economic struggles

Spain increased its basketry imports from €35 million in 2017 to €63 million in 2021. The 2021 imports probably include delayed shipments carried over from 2020, as a dip of -19% in 2020 was followed by a growth of 56% in

2021.

About 90% of Spain's basketry imports came directly from developing countries, which – again – is well above the European average. These imports grew from €32 million in 2017 to €57 million in 2021. Spain's leading basketry suppliers are China (45%), Vietnam (19%), Morocco (7.1%) and Bangladesh (6.3%).

The Spanish economy experienced the largest decline 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.

Poland is a strong emerging market

Poland's growing imports have made the country a leading European basketry importer. Polish imports grew from €23 million in 2017 to €41 million in 2021, at a strong average rate of 15% per year. More than 90% of these imports were sourced directly from developing countries, which is among the largest market shares in Europe. Most of them come from China.

After nearly three decades of continued economic growth, the Polish economy declined with 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 basketry market?

The market for basketry is shaped by various trends, often related to the [HDHT trends](#) 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 resulted in an increased 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
- care about sustainability

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

Wellness: decluttering the home and the mind

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. A tidy home helps European consumers de-stress. With items neatly stored in baskets, consumers create physical space as well as 'headspace'. The recent lockdowns have made this especially relevant, as people had to stay at home together in relatively small spaces. 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](#). For 27%, it has become more important that their ideal home is 'easy to clean' and 'kept clutter-free'.

The functional segment requires practical storage solutions. Important aspects include:

- A good price;
- Easy availability (intensive distribution);
- Durability; and
- Cleaning options for natural materials.

The decorative segment values beauty over functionality and is less price sensitive. Consumers of these products are willing to shop around and pay attention to the stories behind the products.

Tips:

Decide on your position in the market for storage and develop your marketing mix accordingly. Your choice will affect margins, order volumes, communication strategies and logistics.

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

Sustainability: People and planet

Social and environmental sustainability are quickly becoming a central consumer need, also in HDHT. European consumers are increasingly adopting more sustainable lifestyles. 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. [Millennials](#) will soon be the dominant consumer group. They care about sustainability and are used to expressing their preferences through their consumption, by buying products that contribute to a better world.

For basketry, sustainability issues are mainly related to:

- Material choice;
- Renewable resources;
- Water treatment;
- Dyeing; and
- Labour conditions

Transport, energy consumption, consumer use and waste/disposal also play a role. Taking steps towards a more sustainable product and process may add value to your baskets. Various projects have already made an effort to make the entire basketry value chain environmentally and socially sustainable. Examples include projects from [WWF](#) in the Greater Mekong region and [WIPO](#) in Kenya.

Storytelling through traditional designs, craftsmanship and materials

Basketry expresses 'origin' in its materials, techniques and meanings. It has cultural stories to tell, which can add value. Basketry is traditionally a key part of the fair-trade segment. Especially handmade items with a sense of origin from ethnic patterns, weaving techniques or unique materials. Such basketry is often made by women in rural areas. It can tell the story about the importance of meaningful work and income in developing countries – especially for women. This has kept many interesting weaving skills alive.

As European consumers travel to more distant places, they are discovering new stories. Due to its very nature, basketry has always had a strong link to the origin of ethnic groups or regions. Africa has a strong tradition in basketry. From Kenyan kiondos to Ghanaian bolga baskets, Zulu graphics and raffia basketry from Madagascar. Asia also has a tradition in basketry, as do some Latin American cultures. See an example of [various fair trade Ghanaian bolga baskets](#) from The Baba Tree.

The renewed love for handmade techniques in natural materials may be strengthened by the loss of craft skills in Europe. It also reflects a growing tiredness of standardised, mass, industrial products. Therefore, handmade can go premium.

Tips:

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

Use local materials, techniques and designs in your products. Show your craftsmanship by using intricate weaves, patterns or shapes. Showcase the handmade aspect with organic, free shapes rather than rigid forms that resemble industrial production. A good example is [Tashinda Putraprima](#) (Indonesia), who make finely crafted basketry from locally available and renewable materials. They use a village-based production system that allows their artisans to work at home.

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 your importer's.

Invest in experimentation to increase the levels of the craftsmanship of your artisans and your products. This also helps you to expand and refresh your range. In decorative basketry, quality perception is directly related to your product's design.

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

Price pressure poses a challenge

A countertrend is the 'commoditisation' of baskets, especially in the functional lower-end segment. This is due to the dominance of a few large-scale Asian suppliers. In exchange for volume, they can accept small margins by fine-tuning their processes and/or squeezing production costs. This has driven overall price levels down and has led consumers to see these baskets as low-priced items, expecting to get 'a lot for little' (sets). Such low-cost production makes the room to stand out in the lower-end market very small.

Prices are also under pressure in the mid-end market. These baskets have become image items for typical mid-market styles like cottage, colonial or romantic/nostalgic. Players in this segment often struggle to stand out from their competitors. As a result, products in this segment tend to look alike – with their typical whitewash, lettering and inside fabric lining. This has resulted in price pressure, a marked decrease in product quality and a lower value perception.

Tips:

Focus on operational excellence if you wish to target the volume market despite the strong competition. Be efficient in your purchasing of raw materials, inward and outward logistics, productivity and overhead management. Create economies of scale: by increasing the scale of your production, you can lower your cost per item.

Be precise and consistent in your style if you target the mid-end market. Study the relevant style(s) and take the initiative in product development to help your main buyers stand out.

Example company

[WomenCraft](#) is a WFTO Fair Trade Guaranteed social enterprise. They strive to increase economic opportunity in the post-conflict, tri-border area of Rwanda, Burundi and Tanzania. The company brings rural women together, facilitates their growth and connects their artistry to the global marketplace.

The artisans use traditional techniques to make basketry for the higher middle segment, which they call 'decorative storage'. They use local natural and upcycled materials in simple, sophisticated designs. The baskets can be combined with wall hangings made with the same materials and techniques.

Figure 4: Ueli Litscher – WomenCraft | How Products Are Made

Source: [Ueli Litscher @ YouTube](#)

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

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