

The European market potential for candle holders

Last updated:

04 October 2022

European imports of non-electrical lamps and lighting fittings represent nearly half of the global market. About three-quarters of imports come directly from developing countries. This makes Europe an interesting market for exporters in developing countries. By providing ambience, candle holders play a key role in the important sector trends of wellness and cocooning at home. You can add further value to your candle holders with sustainable elements, gift packaging and fun designs.

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1. Product description

Candle holders are decorative items that are functionally related to the product group of candles. Candle holders fall under the home accessories category of Home Decoration and Home Textiles (HDHT).

This report uses the following product codes to refer to trade in candle holders:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
9405 50	27 40 23 00	Non-electrical lamps and lighting fittings

Functionality

The main function of a candle holder is to support the candle that goes inside of it. For safety reasons, a candle holder must be stable, and the flame of the candle it holds must not be able to burn it. A metal cap is often inserted into wooden candle holders to prevent fire.

To produce functional candle holders, you must of course know what types of [candles](#) are common on the European market.

Size

Candle diameters determine the size of the hole of the candle holders. Although candle sizes are not standardised, taper (dipped) candles often have a diameter of 2.2 cm. Pillar (cylindrical, moulded) candles commonly measure 6.8 cm or more, and tea lights, 5.9 cm.

Material

Candle holders come in a wide variety of materials, from natural materials such as ceramics, glass, metal and wood, to synthetic materials such as plastics, resins, or composite materials. They can be produced industrially, by hand, or with the help of simple power tools.

Design

Whereas candle holders used to be mainly functional basics, they have now become decorative home accessories. The design level of candle holders has increased, for example through shape, decoration, functionality and the use of materials. As a result, their decorative value can sometimes be higher than that of the candle itself.

See an example of a [scented candle in a mushroom-shaped holder](#).

European imports of non-electrical lamps and lighting fittings have declined, but they continue to represent nearly half of the global market. About three-quarters of these imports are sourced directly from developing countries. This makes Europe an interesting market for exporters in developing countries.

(!) Because no specific trade data are available for candle holders, these statistics cover non-electrical lamps and lighting fittings.

European imports of non-electrical lamps and lighting fittings decreased from €401 million in 2017 to €396 million in 2021, at an average annual rate of 0.3%. Similarly, worldwide imports of non-electrical lamps and lighting fittings decreased from €954 million to €837 million. This means the European market accounts for nearly half of the total imports.

Developing countries have a fairly stable direct market share of about three-quarters. This means Europe may offer opportunities for exporters in developing countries.

The COVID-19 pandemic and the war in Ukraine continue to disrupt international trade. At the same time, lockdowns have resulted in an increased focus on the home and trends like sustainability and wellness. This may (partially) compensate for the negative effects of the 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 coronavirus, see our report on [how to respond to COVID-19 in the HDHT sector](#).

3. Which European countries offer most opportunities for candle holders?

The larger Western European economies are the main importers of non-electrical lamps and lighting fittings. However, importers in these countries generally sell their products across Europe. The best strategy for exporters in developing countries is therefore to focus on a particular segment, rather than a specific country.

In 2021, the United Kingdom overtook Germany as Europe's leading importer of non-electrical lamps and

lighting fittings, with European import market shares of 21% and 18%, respectively. The remaining top 6 importing countries were the Netherlands (7.7%), Sweden (7.7%), Denmark (%) and France (6.4%). All these markets performed well in 2021, but some of those imports may have consisted of delayed shipments that carried over from 2020. Whether the new patterns seen in 2021 are here to stay, is not yet clear.

Focus on segments

It is important to be aware of the fact that European countries play 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 also distribute them across the continent. This explains why, small countries like Denmark and the Netherlands often import much larger quantities of HDHT items than they consume.

In terms of marketing, it should be kept in mind that countries are not the same as markets. The HDHT sector has different market segments, ranging from low- to high-end (see our report on [entering the market for candle holders](#)). Every European country has these segments, although their size may vary by country. Therefore, it makes much more sense to select a segment that fits the product range and contact the importers and distributors in that segment, instead of in a specific country. These distributors will then sell the products in that segment across Europe.

Consumer spending and confidence are under pressure

An important indicator for growth in demand is general consumer spending ('real private consumption expenditure'). 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.

Until the outbreak of COVID-19, the leading European markets showed an annual growth in consumer spending of around 1-3%. Due to the pandemic, this trend was broken in 2020. In 2021, growth moved 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 plummeted](#) due to the situation in Ukraine. This reflected a sharp drop in households' expectations about the general economic situation in their country, and their own future financial situation. Consumers' intention to make major purchases also fell. This lower consumer confidence may well lead to lower spending, and lower demand for HDHT products.

Brexit may stimulate direct trade with the United Kingdom

British imports of non-electrical lamps and lighting fittings tend to fluctuate. In 2021, they recovered strongly after a decline in 2020, so strongly, in fact, that the United Kingdom became the largest importer in Europe. At €83 million, imports returned to the peak level recorded in 2017. An impressive 92% of these imports are sourced directly from developing countries, mostly from China.

[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 goods 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 lower value of the British Pound since the Brexit referendum also makes direct trade more attractive.

[British GDP decreased by 9.9% in 2020](#), a record decline. As in most Northern and Western European countries,

the [British economy returned to pre-pandemic levels by 2021](#). Considering this positive development and the potential increased interest in sourcing directly from developing countries, the United Kingdom could be an interesting market for exporters in developing countries. However, China's dominance may somewhat limit the opportunities. A focus on the mid- to high-end segments is needed in order for an exporter to differentiate itself from China's mass production and add value to its products, for example by using sustainable materials.

Germany is the largest European importer

Germany, which is home to nearly a fifth of the European Union's population, is the largest economy in Europe. The European Commission projects that [German GDP will return to pre-COVID-19 levels by the fourth quarter of 2022](#). This is somewhat behind most other Northern and Western European countries, where the economies recovered in 2021.

German imports of non-electrical lamps and lighting fittings also fluctuate. In 2021 they reached €72 million, which is exactly the same value as in 2017. About 82% of these imports came directly from developing countries, which is above the European average. China (67%) and India (13%) are the main suppliers.

In addition to having a large domestic market, Germany is also one of Europe's key trade hubs. This makes Germany an interesting market for exporters in developing countries. As in the United Kingdom, it is important to focus on the mid- to high-end segments and for exporters to add value to their products in order to differentiate themselves from China's mass-production.

The Netherlands is an important European trade hub

Dutch imports of non-electrical lamps and lighting fittings were booming, until they declined in 2020 due to the COVID-19 pandemic. They returned to their 2019-levels in 2021, resulting in an average annual growth rate of 7.2% since 2017. Developing countries have an import share of about three-quarters, which is comparable to the European average. The Netherlands' key suppliers are China (55%), India (19%) and Germany (12%).

As in other Western European markets, Dutch GDP returned to 2019 levels in 2021. Brexit and various international trade disputes may have a big impact on the Netherlands, since the country relies heavily on international trade. Because developments in other European countries play a key role, Dutch imports are difficult to predict. However, the Netherlands' strong performance as a European trade hub continues to make it an interesting market for you.

Sweden significantly increases its imports

Swedish imports of non-electrical lamps and lighting fittings grew from €21 million in 2017 to €29 million in 2021, at an average rate of 7.9% per year. Sweden is the only leading importer that managed to keep its imports stable in 2020. The country sources about 55% of its imports directly from developing countries, which is a relatively small percentage. Sweden's leading exporters are China, Poland, India and Denmark.

Like most Northern and Western European economies, Sweden's GDP returned to 2019 levels by 2021. Combined with its growing market for non-electrical lamps and lighting fittings, this suggests Sweden could hold opportunities for exporters in developing countries.

Denmark is the home of Danish design

Danish imports of non-electrical lamps and lighting fittings were already in decline before the COVID-19 pandemic disrupted trade. In 2021 they recovered considerably, reaching €22 million. This resulted in an average annual growth of 1.7%. However, the 2021 imports probably included some imports that would have otherwise taken place in 2020. About 84% of these imports came directly from developing countries, which is above the European average. Denmark's main suppliers are China (60%) and India (20%).

Denmark is a well-known player in the HDHT sector, and the home of the famous Danish design. The Danish economy was one of the least affected by the COVID-19 pandemic, and it recovered by 2021. The country could

be an interesting market for exporters in developing countries, but whether the strong performance of 2021 continues in the coming years is uncertain.

France switches to suppliers in European trade hubs

French imports of non-electrical lamps and lighting fittings fell from €25 million in 2017 to €21 million in 2021, at an average annual rate of 4.1%. If this trend continues, emerging market Poland may soon overtake France to become a top 6 European importer.

At the same time, France's direct imports from developing countries decreased at an average annual rate of 13%. This resulted in a share of 52%, which is the lowest of the top 6 importers. China remains France's leading supplier, but it seems France has substituted some of these imports with goods from European countries like the Netherlands, Germany and Belgium. Because these countries are important European trade hubs, some of their goods may well be re-exports of non-electrical lamps and lighting fittings from developing countries.

Economic growth in France had already slowed down before plummeting to -8.3% in 2020 due to the pandemic. Global uncertainties and the effects of social unrest weighed on consumer confidence and the consumption of non-essential products. However, French GDP returned to its pre-pandemic level by 2021. Considering the country's relatively stable market for goods from developing countries, this suggests France could offer opportunities to exporters in developing countries.

Tip:

Do not just focus on specific European countries. Instead, identify the appropriate segment and let your buyers distribute your products across Europe within that segment.

4. Which trends offer opportunities on the European candle holder market?

The market for candle holders is shaped by various trends, which are often related to the [trends in HDHT](#) at 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 encourage consumers to:

- make their homes more pleasant, practical and comfortable
- merge the outdoor and indoor areas
- declutter
- care more about sustainability

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

Home Sweet Home: cocooning with candles

This trend involves a home that serves as a shelter for a – slightly older, [baby boomer](#) – consumer. This consumer seeks to make the home into a retreat with a comfortable, quite luxurious interior – a world unto

itself, as it were. However, Home Sweet Home is also about families or groups of friends enjoying each other's company, entertaining each other, cooking and dining, or just relaxing together. The COVID-19 pandemic has strengthened these two aspects of indoor living.

Candles and candle holders are vital components in making consumers feel at home. European consumers use candles to create ambience in the home. As such, candles have been transformed from basic, functional lighting to more emotionally charged items that help create a positive mood in the home: cosiness, romance and togetherness.

Candle holders have made a similar transformation, from purely functional holders for the candle to decorative items in their own right. They are used all over the living room: silver candleholders with dinner candles on the table, small glass containers with tea lights on the mantelpiece, and a large stand on the floor. And both candles and candle holders can be found in other parts of the house too, from the bedroom to the bathroom.

Tip:

Offer a wide range of shapes, sizes and colours, to appeal to both the older and younger customer base in Home Sweet Home products.

Wellness: improving mental and physical health

European consumers are constantly trying to improve themselves, both in mind and body. The fact that [the COVID-19 pandemic has made consumers more acutely aware of the importance of both their mental and physical wellness](#) has further stimulated this tendency. In a 2021 global Young Living survey, [48% of respondents reported they were making wellness and self-care a top priority](#).

To boost their mental and spiritual wellness, consumers increasingly value spa and yoga practices, connecting with nature, and healthy sleeping habits. Candles can play a role in wellness by creating a relaxed atmosphere in various settings in the home. They feature in spiritual rituals and in spa and yoga contexts, both at home and away. This, in turn, has increased the demand for suitable candle holders. Natural raw materials and/or natural colours also fit in with the desire to connect with nature.

Tips:

Think about wellness rituals from your own culture and what items and styles can be made suitable for the European market.

Use natural colours and materials to give your candle holders a natural look.

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

Craftsmanship

The wellness trend has also made consumers more open to aspects of craftsmanship and authenticity. Candle holders have become a playground for designers to show their design skills, ranging from an imaginative use of shapes to exceptional forms of craftsmanship. These skills can be applied to every aspect of the product to

create candle holders with smooth or 'raw' finishes, abstract or figurative shapes, clever or unexpected uses, combinations of materials, and techniques. This has made candle holders an ideal gift, and in some cases has resulted in the holder 'outshining' the candle.

Tips:

To begin with, ensure you have a superior knowledge of your materials and what design flexibility they give you. Show your technical mastery to bring out the best in your materials.

Add novelty to your candle holders with surprising shapes, functional applications, an interesting feel or visual impact.

Think in terms of collections! When designing a line of candle holders, start from one design aspect (for example a shape, form, colour or theme) and develop that into a clear and attractive range of items. Research how existing brands in the market do this.

Use your marketing channels (and perhaps a note with your product) to tell your making stories: how was the candle holder made, what was the inspiration for the design, what cultural elements play a role? This allows consumers to connect with your product.

The ideal gift

Gift-giving is an important wellness aspect, helping consumers connect with people that are close to them. Candle holders have gone from being standalone gifts to being physically merged with candles to add to the gift and decorative value of candles. Scented candles, in particular, are increasingly being sold in decorated containers, usually with branding. In such cases, the candle and its holder form one coherent design statement. Each component adds value: the giver can choose a candle in the favourite colour or scent of the receiver, and the holder can add a further message or story. Together, these aspects form the perfect gift.

Tip:

Develop gift-wrapping for your candle holder (or candle-in-holder), such as a nice box. For more information on packaging, see our report on [market entry for exporters of candle holders](#).

Celebration

The feeling of connectedness that plays such a big part in wellness is emphasised during moments of celebration. Candles and candle holders can brighten up special occasions, such as:

- Christmas, or other holidays
- personal celebrations, such as birthdays or weddings
- the tea-drinking ritual, which often includes tea lights (in attractive holders)

Christmas is the most important of these occasions. Not only are candles used extensively, but the range of Christmas decorations includes candle holders. In addition, candle holders make nice Christmas gifts. The shapes and colours of these seasonal candle holders represent the well-known Christmas imagery, such as stars, Christmas trees, or snowy landscapes. Candle holders are subject to short-term trends (especially when it comes to colour and theme) and are likely to trigger impulse buying. Both are influences that consumers

generally find hard to resist, giving seasonal candle holders a replacement value.

Tips:

Communicate your wellness story, about how candles and candle holders can contribute to those precious moments of reflection and togetherness created by private and public celebrations.

If you are already active in the candle holder business, consider seasonal designs as an opportunity to generate additional turnover. For more information, see our report on [Christmas tree decoration](#).

Into the garden

For many consumers, closeness to nature means spending time in gardens. The garden has become an extension of the home. It now receives equal attention when it comes to decorating and expresses the consumer's taste just as much as the indoor spaces do.

Candles have begun appearing in gardens, followed by candle holders. There are oversized candles and XL holders available in durable materials ranging from stone and treated wood to synthetics. Lanterns are especially popular. Candles are floating in holders of glass and other materials. Wall sconces (a holder that is affixed to a wall) with reflective disks add reflection and create a nostalgic, theatrical effect.

Fun and play

Play is a deeply-rooted human desire and gets the consumer into a light-hearted, relaxed mood. As such, it is a key wellness need. Today's consumers, both young and old, play a lot. One aspect of this playfulness is humour, which can also be incorporated into candle holders. This trend is here to stay, especially because it connects so deeply with the consumer's emotions. Examples of humour include:

- 'designer' jokes such as warped or twisted or seemingly damaged designs
- trompe l'oeil or optical illusions (3D)
- funny or cute decorations
- candle holders that are actually candles

See an example of a [handmade porcelain house-shaped candle holders](#).

Another way for consumers to have fun with their candle holders is by 'making' their own, or at least arranging them in their own way. Examples include:

- components that consumers can (re-)arrange to form different shapes.
- options in terms of shape, colour, dimensions
- options for consumers to 'finish' the candle holder, such as a plain wood design that they can paint
- an adjustable design, for example through moveable 'arms'

See an example of a [World Fair Trade Organisation-guaranteed stackable soapstone candle holders](#).

This allows consumers to 'participate' in the creation process. Additionally, consumers like to mix and match different styles, or combine new purchases with flea market finds - which can also be a way to make their home decoration more sustainable.

Tips:

Research the market for examples of light-heartedness and find methods that are aligned with your own organisational identity. Humour is a key way to connect to the consumer, but what is considered funny may be personal or cultural.

Offer components, options and other ways to allow consumers 'create' or 'finish' their candle holder, thus adapting it to their personal taste.

Environmental and social sustainability

European consumers and designers are making more and more sustainable choices, especially in the mid-high to high-end market. They are increasingly aware of and concerned about the negative impacts of production and consumption.

Using recycled or (sustainably produced) natural materials as your main raw material fits in well with this trend. There is not much available (yet) in terms of candle holders made of recycled materials or that are produced by means of responsible practices, but this may change soon. There is already a strong trend towards the use of sustainable, planet-friendly ingredients in candles, and we can expect this to spill over into the holders.

There is, however, a broad range of candle holders on offer in the fair-trade segment. Social responsibility is another key aspect of sustainability, particularly in the production of handmade items. The styles of fair-trade candle holders range from traditional/ethnic to contemporary.

The COVID-19 pandemic has further emphasised the delicate balance of the planet. It has highlighted the need to for more sustainable production practices – taking account of our resources, our people and the planet in general. This has boosted the importance of this trend. For most consumers (particularly the younger generations), [the COVID-19 pandemic has made it more important for both consumers and companies to improve their sustainability](#). In addition, [most people want significant change in order to make the world a fairer and more sustainable place after COVID-19](#).

Tips:

Use recycled or (sustainably produced) natural materials.

Look into other ways to reduce your impact on the environment, for example by adjusting your production process or reducing your transport emissions, or by making items recyclable.

Promote the sustainable aspects of your candle holders and emphasise the story behind your product (and/or company) in your promotion strategy.

If your importer is interested, consider certification options such as fair trade. For more information, see our report on [buyer requirements](#).

For more information, see our special report on [sustainability](#).

Example company

Fair trade importer/wholesaler [Kinta](#) maintains close ties with small-scale, often family-based producers in the Philippines, Vietnam and Thailand. Its candle holders and home accessories “pair ethical and sustainable production with timeless and poetic design”. The look is contemporary, with a touch of popular Dutch design. Wherever possible the products are made from either recycled or sustainable locally-sourced materials. The products “feel good to use and [are] made to last”, which refers both to wellness and sustainability – two megatrends expected to continue in the years to come.

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

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