

The European market potential for ready-made curtains

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Europe sources more than half of its ready-made curtain imports from developing countries, making it an interesting market for exporters in developing countries. An increased interest in social and environmental sustainability is a key trend that is shaping this market. There are opportunities for both contemporary and traditional designs, or a combination of the two. Smaller quantities and shorter lead times are in demand among buyers, many of which are also interested in co-creation.

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1. Product description

Curtains are fabric panels designed to cover or decorate a window, also known as window treatments. Within the Home Decoration and Home Textiles (HDHT) sector, curtains are categorised under 'home textiles'. Ready-made curtains are curtains of a standard size and specification, as opposed to tailor-made (customised) curtains.

For the purposes of this report, ready-made curtains will include:

- curtains
- drapes
- blinds

Curtains come in various lengths and widths to fit different-sized windows. Many are unlined and may be (semi-)transparent (sheer and voile curtains). They are hung on rods or tracks, along which they can be drawn across the window.

Drapes can also be hung from rods or tracks, but they are typically full length – from ceiling to floor. They are often lined, and tend to be heavier than regular curtains. This allows drapes to block more sunlight, making them ideal for the bedroom.

There are three main types of blinds. Roman blinds are vertical flat blinds, drawing up from the bottom in soft folds. Venetian blinds have horizontal slats, one above another. Swiss blinds are vertical blinds that draw up from the bottom, with horizontal patch tunnels for the rods at the back.

This report uses the following product codes to refer to trade in ready-made curtains:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
630312	13 92 15 30	Curtains, including drapes, and interior blinds, curtain or bed valances of synthetic fibres, knitted or crocheted (excluding awnings and sunblinds)
630319	Curtains, including drapes, and interior blinds, curtain or bed valances, knitted or crocheted (excluding of synthetic fibres, awnings and sunblinds)	
630391		Curtains, including drapes, and interior blinds, curtain or bed valances of cotton (excluding knitted or crocheted, awnings and sunblinds)
630392		Curtains, including drapes, and interior blinds, curtain or bed valances of synthetic fibres (excluding knitted or crocheted, awnings and sunblinds)
630399		Curtains, including drapes, and interior blinds, curtain or bed valances of textile materials (excluding of cotton and synthetic fibres, knitted or crocheted, awnings and sunblinds)
	13 92 15 50	Curtains and interior blinds, curtain or bed valances, of woven materials
	13 92 15 70	Curtains and interior blinds, curtain or bed valances, of non-woven materials

Functionality

Curtains can serve various functions, including providing privacy, blocking natural or artificial light providing the home with thermal or acoustic insulation or decorating it. They can also be used as flexible room dividers within a space in the home. The most suitable type of curtain and material will depend on the desired functionality. See an example of [curtains used as room dividers](#).

Material

Because sunlight and washing can fade colours, the material for curtains should be lightweight and colour-fast. Manmade fabrics are common, but natural materials are also popular. Lighter curtains are made of lightweight fabrics, such as silk, cotton or linen. Drapes are usually made of heavier fabrics, such as velvet, satin, opaque and jacquard.

Size

Curtains are often sold in pairs. An example of a standard size is 145cm (width) x 300cm (length), but this can vary. For example, sheer curtains are usually 110 x 250cm. The consumer can also adjust the length.

Drapes sold in Europe usually vary from between 115/140/180/225cm in width and 140/170/180/230/300 cm in length.

Standard sizes for blinds in Europe are as follows:

- width: 60/80/100/120/140/160/180/200cm (Roman), 80/100cm (Venetian)
- length: 180/195/250cm (Roman), 130/155/160cm (Venetian)

Other sizes are also available. Ask your European buyers what specific sizes they may be looking for in the early stages of collaboration.

Design

The design aspects of curtains include colour, pattern, and texture. When curtains are used as simple backdrops to a room, neutral tones such as whites or off-whites are usually preferred. For a more expressive use of curtains to add blocks of colour that highlight the window area brighter colours may be used and patterns with anything from floral motifs to abstract geometrical forms.

Texture adds another dimension and is created with weaving techniques, such as those used in velvets or chenille. A bit of texture can add a welcome 'touch' to plain white and off-white curtains. It can also be a sign of luxury and quality, as in velvet or velour curtains. Consumers add to the impact of the curtains in the room by using them full or half length, choosing fabrics that filter or block the sunlight, and by deciding how the upper borders are to be finished.

Common heading styles to attach a curtain to a rod or track include:

- rings
- grommets (eyelets)
- pockets (tape)
- loops, usually of the same materials as the curtain
- tabs
- clips
- hooks

Popular pleating styles include:

- pencil - standard, even pleats
- pinch - fuller, sewn-in pleats at regular intervals
- box - sewn-in hidden pleats at the back

The European market for ready-made curtains is growing. More than half of the import value comes directly from developing countries, making Europe an interesting market for you.

European ready-made curtain imports grew from €1.6 billion in 2017 to €1.9 billion in 2021. This accounts for

about half of the worldwide imports. There was a slight decline in imports in both the European and the worldwide market in 2020, but both markets recovered strongly in 2021. Some of these 2021 imports may have consisted of delayed shipments that carried over from 2020.

Developing countries have a fairly stable direct market share of more than 50%. These imports grew from €897 million in 2017 to €1.1 billion in 2021. Taken together, these aspects make Europe an interesting market 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 COVID-19 pandemic on the sector, see our report on [how to respond to COVID-19 in the HDHT sector](#).

3. Which European countries offer most opportunities for ready-made curtains?

The larger Western and Northern European economies are the main importers of ready-made curtains. However, importers in these countries generally sell their products throughout Europe. Therefore, it is best to focus on a particular segment, rather than a specific country.

In 2021, Germany remained Europe's leading importer of ready-made curtains with 23% of imports, followed by France and the United Kingdom (13% each). The Netherlands (10%), Poland (5.1%) and Sweden (4.5%) were the remaining top 6 importing countries. All these markets performed well in 2021, but some of those imports may have consisted of delayed shipments that carried over from 2020. Whether new patterns from 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 markets. The HDHT sector has different market segments, ranging from low- to high-end (see our report on entering the [market entry for ready-made curtains](#)). 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, annual growth in consumer spending was around 1% to 3% in the leading European markets. Due to the pandemic, this trend was broken 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' intentions to make major purchases also fell. This lower consumer confidence may well lead to lower spending, and lower demand for HDHT products.

Germany remains 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 later than most other Northern and Western European countries, where economies recovered in 2021.

German imports of ready-made curtains grew from €404 million in 2017 to €441 million in 2021, at an average yearly rate of 2.3%. Interestingly, they did not decrease in value during the pandemic-related trade disruptions of 2020. Germany's role as a key trade hub in Europe may have helped the country maintain strong performance.

About 58% of Germany's import value comes directly from developing countries, which is slightly above the European average. These imports grew from €208 million in 2017 to €256 million in 2021, at an average annual rate of 5.4%. Germany's main exporter of ready-made curtains is China, followed by Poland, Czechia and Turkey.

In addition to having a strong domestic market, Germany is also one of Europe's key trade hubs. Combined with its growing market for developing countries, this makes Germany an interesting market for exporters in developing countries.

France imports more from other European countries

French ready-made curtain imports grew from €200 million in 2017 to €254 million in 2021, at an average annual rate of 6.2%. This was mainly due to an impressive 40% increase in 2021. Before then, they hovered around €190 million.

The country's ready-made curtain imports from developing countries grew from €146 million to €152 million, at an average annual rate of 1.1%. This amounts to a direct share of around 60% in 2021, which is slightly above the European average. At the same time, however, French imports from other European countries nearly doubled from €51 million to €101 million. Pandemic-related disruptions in 2020 appear to have led France to shift some of its focus to intra-European trade with hubs like Belgium, the Netherlands and Germany. China remains France's leading supplier, followed by Tunisia.

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. French GDP did return to its pre-pandemic level in 2021. However, considering the

country's apparent shift towards European suppliers, the opportunities in France for exporters in developing countries may be limited.

Brexit may stimulate direct trade with the United Kingdom

After some fluctuations, the United Kingdom's imports of ready-made curtains grew to €250 million in 2021. This amounted to average annual growth of 3.5% between 2017 and 2021. More than 80% of these imports came directly from developing countries, which is well above the European average. Most of them come from China and Vietnam.

[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 products directly from developing countries, rather than from European importers. This would allow 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 well offer you opportunities. In order for an exporter to differentiate itself from the low-cost production in China and Vietnam, it must focus on the mid- to high-end segments and add value to its products, for example by using traditional techniques and sustainable materials.

The Netherlands is an important European trade hub

Dutch ready-made curtain imports grew from to €137 million in 2017 to €184 million 2021, at an average rate of 7.7% per year. Like Germany, the Netherlands is an important European trade hub, where imports did not decline in 2020. Unlike Germany, however, the Netherlands only imported 27% of the curtains directly from developing countries. This makes it the only leading importer to import less than half of its curtains from developing countries. China and Germany are the main suppliers, followed by Czechia, Belgium and Poland.

As in other Western European markets, Dutch GDP returned to 2019 levels by 2021. Brexit and various international trade disputes may have a big impact on the Netherlands, since the country relies heavily on international trade. Dutch imports are difficult to predict as these are heavily influenced by developments in other European countries. However, the Netherlands' strong performance as a European trade hub continues to make it an interesting market for exporters in developing countries. As one of the key trade hubs, Germany could provide an alternative route to the Dutch import market.

Poland is a booming market

Poland's surging imports have made the country a leading Europe importer of ready-made curtains. They nearly doubled from €53 million in 2017 to €99 million in 2021, at an impressive average growth rate of 17% per year. 2019 and 2021 were particularly strong years, with increases of more than 40%. About 84% of these imports came directly from developing countries, which is the largest share among the leading markets. However, China dominates this market with about two-thirds of the imports.

After nearly three decades of continued economic growth, the Polish economy declined by a relatively modest 2.7% in 2020. After that, Polish GDP was among the first European economies to recover in 2021. As the Polish market matures, it may be an interesting market for exporters in developing countries.

Sweden steadily increases its imports

After declining slightly in 2018, Swedish ready-made curtain imports have been growing. In 2021 they reached €88 million, amounting to average annual growth of 5.9% between 2017 and 2021. About 53% of these imports came directly from developing countries, which is equal to the European average. China and Germany are Sweden's leading ready-made curtain suppliers, followed by Denmark.

Like most Northern and Western European economies, Swedish GDP returned to 2019 levels by 2021. Combined with its growing market for ready-made curtains, this could make Sweden an interesting market for 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 this segment.

4. Which trends offer opportunities on the European ready-made curtains market?

The market for ready-made curtains is shaped by various trends, which often reflect 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. Wellness and working from home have become hot topics since lockdown measures were introduced.

Spending a lot of time at home has also encouraged 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 already existed and may have been strengthened.

Home Sweet Home: atmosphere in the home

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.

Curtains can block or filter sunlight, and as such play an important role in regulating the amount of light and the temperature in the home. In addition, they add colour, texture and patterns to any room in the house, whether it be the living room, bedroom or another space. This makes curtains a vital aspect of the atmosphere in the home, and the extent to which consumers can create a feeling of cosiness in the home.

The ambience created by curtains is a key way to create cosiness, often expressed by the word 'cocooning', or gathering together to enjoy each other's company. Other home textiles such as cushions, throws, rugs and carpets also have this effect, but the impact curtains can have on a person's mood is often underestimated.

Now that more people are working from home and for longer periods of time, certain areas of the home are being used as both living and office spaces. Curtains can be used to divide the space into separate areas for working and living, thereby helping to create a stress-free environment and boosting concentration.

Environmental and social sustainability are key

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. This is driving the popularity of sustainability labels and commitments in the textile industry.

A huge trend in curtains – and home textiles in general – is the use of alternative fibres and a more sustainable production process, especially for dyeing. Using natural materials such as (certified) organic cotton or linen as the main raw material fits in well with this trend. Using alternative natural materials like bamboo, ramie, flax, banana fibre, palm leaf fibre or cane hemp may also open up interesting opportunities. Another trend is the use of recycled fibres – an example of this is recycled PET or ocean plastics. See an example of [washed linen curtains](#).

Using natural dyes adds an extra sustainable feature to your ready-made curtains. Big textile manufacturers are using engineering techniques to create a more sustainable dyeing process, in which textile dyes are produced using from bacteria, DNA material or proteins. More low-tech developments in dyeing involve the use of organic materials. The textile industry is also trying to make use of [closed loop](#) production systems, resulting in both economic and environmental gains. Production methods that use less water are another point of interest for many big industry players.

The COVID-19 pandemic has further emphasised the delicate balance of the planet. It has highlighted the need 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:

Work according to the three Rs: reduce waste, reuse and recycle. Recycling can be done in several ways, including the reuse of post- and pre-industrial waste, or pre- and post-consumer waste. Once you make sustainability a core aspect of your company values and practices, this may well help your company cut costs and increase profits, as well.

Use natural materials, including natural ingredients such as dyes made from natural resources. When it comes to sustainability, natural materials are usually preferred over synthetic and manmade fibres. However, it does depend on how your materials are cultivated, sourced and traded, and whether they are renewable.

Focus on both social and environmental sustainability. If your raw materials are sustainable, but your production process is unfair, unsafe or unhealthy, your three Ps of sustainability (people, planet and profit) are not in balance.

Promote the sustainable aspects of your ready-made curtains as an added benefit and emphasise the story behind your product in your promotion strategy.

For more information, see our special report on [sustainability](#) and our webinar on [the sustainable transition in apparel and home textiles](#).

Innovation and tradition

There is a growing demand for innovative concepts, such as air purifying curtains and “smart” curtains. Air purifying curtains such as IKEA’s [Gunrid](#) are able to break down common indoor air pollutants. Smart curtains

can be opened or closed automatically using a remote control or mobile app. Consumers can also buy separate systems that make their existing curtains smart. See an example of [air-purifying curtains](#).

At the same time, European consumers increasingly appreciate traditional craftsmanship. The traditional production methods and designs of your culture can give your curtains a story that resonates with them. “Technocraft”, a combination of technology and craftsmanship, is an interesting mix of both concepts.

Tips:

Promote your culture’s traditional production methods and designs, to add to the story of your products.

Research your possibilities for developing innovative concepts and/or combining them with your craftsmanship.

Example company

German brand [The Spirit of OM](#) designs, produces and sells natural organic textiles, including curtains. Its Mira curtains are made from 100% organic cotton and finished with rose quartz. Both the curtains and the company are GOTS-certified. The brand’s philosophy is based on the wellness principles of harmony and positive energy, which is expressed in fair working conditions and employee-friendly work processes. It only uses natural materials and non-toxic, environmentally safe fabrics and paints in all its home and fashion textiles.

The Spirit of OM is a company with an integrated set of sustainable and wellness principles and practices. These not only make it a frontrunner, but future proof too, bringing together two of the most basic needs of consumers: doing good and feeling good.

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

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