

# The European market potential for birdhouses

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Europe is an interesting market for birdhouses. Most Europeans have a garden or balcony, and millions are members of bird and nature conservation organisations. These organisations often promote the use of nesting boxes and arrange annual garden bird counts. Birdhouses also fit in with key consumer trends of decorating outdoor spaces and focusing on wellness. Many people started birdwatching during the COVID-19 lockdowns because of its benefits for mental health. As birdhouses can be both functional and decorative, you can add value with design and sustainable elements.

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## 1. Product description

A birdhouse, nest box or nesting box, is an artificial nesting site for birds, which consumers can hang in their garden or other outdoor spaces. The term can also include birdfeeders and so-called 'roosting pockets' or 'pouches', which mainly serve to provide temporary shelter.

In the Home Decoration and Home Textiles (HDHT) segment, there are several [categories made up of various product groups](#). Birdhouses are categorised as garden products.

This study uses the following codes to indicate trade in birdhouses.

Table 1: Product codes

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 tropical wood, wood marquetry and inlaid wood
6913 10	Statuettes and other ornamental ceramic articles of porcelain or china, not specified elsewhere
6913 90	Statuettes and other ornamental ceramic articles, not specified elsewhere, excluding porcelain and china
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

\* 2019-2021

\*\* 2022-2023

These HS codes cover decorative objects in general because no specific trade data are available for birdhouses.

## Functionality

Although the main and original purpose of birdhouses is to provide shelter for birds, they can be both functional and decorative. Modern birdhouses protect birds from predators and the weather, while also serving as garden accessories. However, to keep birds safe, functionality should always be your priority when designing birdhouses.

## Material

Nest boxes are usually made using wood, such as cedar, oak or beech. This provides good insulation and ventilation, keeping the birds warm in winter and cool in summer. Another popular material is 'woodcrete', which is a mix of wood fibres and concrete. This material is particularly durable and weatherproof, while also being breathable and insulating. Studies suggest that some birds [may prefer woodcrete nest boxes](#).

Roosting pockets are often made from woven materials, like grasses and reeds. Birdfeeders also come in materials like metal, plastics or ceramics, which can add decorative value. These materials are generally unsuitable for nest boxes, as they may cause the boxes to overheat, which is dangerous for nesting birds.

## Size

Nest boxes for small garden birds are often 26–30 cm high and 15–20 cm across. They need an appropriate opening to serve their main purpose. The diameter of the opening generally ranges from 25 mm to 50 mm,

depending on the species the box is designed for. It should be large enough to allow nesting birds in but small enough to keep other birds and predators out. For this reason, it should be at least 12 cm from the floor of the box. Some popular garden birds, like robins and wrens, prefer open-fronted boxes.

## Design

For nest boxes in particular, the focus should be on function. They are often house-shaped with slanted, overhanging rooves that may open to facilitate cleaning. Nest boxes must be waterproof, with ventilation/drainage holes in the floor. To avoid attracting predators, nest boxes should have natural colours. Designs for birdfeeders can be expressive and decorative, with brighter colours and interesting materials. Birdhouses should be easy to install. For example, they can have mounting brackets, hangers or straps to avoid damage to trees.

Figure 1: handmade multifunctional birdhouse – designed in collaboration with ornithologists

Source: [Wildlife Garden @ YouTube](#)

### Tip:

Read the British Trust for Ornithology's [essential guide to nest boxes](#) for more important specifications.

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

An estimated [82% of Europeans have a garden or a balcony at home](#). Many European [bird and nature conservation organisations](#) encourage consumers to put up bird nesting boxes before the breeding season,

especially because European bird populations are in decline, and birds need nesting spaces. For example, [National Nestbox Week](#) is celebrated in the United Kingdom every year from 14 February.

Figure 2: Bird boxes and where to put them

Source: [The RSPB @ YouTube](#)

The following statistics cover decorative objects in general because no specific trade data are available for birdhouses.

Source: UN Comtrade

European imports of decorative objects, including birdhouses, declined by 10% in 2020, to €2.2 billion. This was followed by strong growth in 2021 (€2.7 billion) and 2022 (€3.4 billion). This probably included some carryover from 2020 and importers re-stocking. After these fluctuations, imports returned to €2.5 billion in 2023. This translates to an average annual rate (CAGR) of 0.9% since 2019. About two-thirds of Europe's import value came directly from developing countries. These imports reached €1.6 billion in 2023, comparable to 2019. This suggests that imports may be returning to more 'normal' pre-pandemic patterns.

The COVID-19 pandemic and the war in Ukraine have disrupted international trade, affecting the costs and availability of raw materials, energy and transport. At the same time, lockdowns have led to an increased focus on the home and garden, and they have introduced many people to birdwatching. The pandemic also boosted trends like wellness and 'home sweet home'. Birdhouses fit into this by allowing consumers to connect with nature, as well as providing decorative value. This may partially compensate for the pressure that the [cost of living crisis](#) has put on consumer spending. See the section on [trends](#) for more drivers of demand.

#### Tips:

Be prepared for potential future trade disruptions. Read our [study on how to respond to COVID-19](#) for information on how to future-proof your business.

Study and apply the trends in the market for birdhouses to appeal to European consumers.

### 3. Which European countries offer the most opportunities for birdhouses?

The larger Western European economies are the main importers of birdhouses. 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 2023, Germany remained Europe's leading importer of decorative objects, including birdhouses, with 19% of imports, followed by France (13%), the Netherlands (12%) and the United Kingdom (11%). Together, they accounted for more than half of the European total. Smaller markets with a share of less than 10% but still in the top six leading importing countries are Italy (6%) and Spain (5%).

#### Focus on segments

European countries have different roles in the HDHT market. Some are mainly importers while others are mainly manufacturers. Western European countries are mainly importers, and most Western European importers are re-exporters. They sell their products in their own country but also distribute them across the continent. This is why, in the HDHT segment, small countries like the Netherlands often import much more than they consume.

In terms of marketing, you should be aware that countries are not markets. The HDHT market is made up of different segments, ranging from low to high-end (see our study on market entry for birdhouses ). Every European country has these segments, although their size may vary. As such, it makes much more sense to focus on a segment in birdhouses and connect with importers in that segment. These importers will then sell your products in this segment throughout Europe.

### Consumer spending is under pressure

Birdhouse 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 non-essential products tend to increase.

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the resulting energy crisis. Although it has improved since, consumer confidence is still below the long-term average. This may well lead to lower spending.

Source: OECD

Before the COVID-19 pandemic, consumer spending ('private consumption expenditure') in the leading European markets grew by about 1–3% per year. 2020 broke this trend due to the pandemic. Growth bounced back into positive figures in 2021. Forecasts for 2024/2025 are modest, reflecting consumer confidence.

In an autumn 2022 European consumer survey, [about half of the respondents intended to decrease their spending on home products and furniture](#), in line with the drop in consumer confidence. This continued in 2023, when [60–66% claimed to 'trade down' when shopping for home and furniture items](#), by shopping around for the best deals, for example. At the same time, 14% intended to splurge on home decoration. This suggests consumers may save up first so they can spend more later.

## Germany is Europe's largest importer

Europe's leading importer of decorative objects, including birdhouses, is Germany. [NABU](#), Germany's Nature And Biodiversity Conservation Union, was founded as a bird conservation association. It has more than 940,000 members, up from 560,000 in 2014. This reflects a large and growing interest in nature and wildlife. About 50,000–70,000 people generally participate in NABU's annual garden bird count.

Germany's large domestic market, its role as a trade hub and relatively high decorative object imports from developing countries make it an interesting market. The country's imports peaked at an impressive €798 million in 2022, before returning to a more modest €476 million in 2023.

84% of these imports came directly from developing countries, which is the largest market share in Europe. This translated to €397 million in 2023. China is Germany's main decorative object supplier, making up more than two-thirds of the imports. India followed with 8% in 2023.

## France's import share for developing countries is modest

The French bird conservation association [LPO](#) (Ligue pour la Protection des Oiseaux) has 70,000 members. More than 28,000 people actively participate in its Garden Bird Observatory. It also boasts more than 400,000 subscribers on social media.

The country's imports of decorative objects grew from €273 million in 2019 to €333 million in 2023, with a CAGR of 5.1%. This included strong growth in 2021 and 2022, when imports peaked.

Imports from developing countries reached €174 million in 2023. Their direct import market share of 52% in 2023 is below the European average. Since 2020, France has increased its imports from European trade hubs for its imports of decorative objects. This may have been an effect of the international trade disruptions after the outbreak of the COVID-19 pandemic. Its leading suppliers are China (42% in 2023) and the Netherlands (14%).

## The Netherlands is an important European trade hub

The Dutch [Vogelbescherming](#) is a bird conservation organisation with 155,000 members. More than 100,000 people participate in its annual garden bird count. The Netherlands is also an important European trade hub. This could make the country an interesting market for you.

Dutch decorative object imports peaked at €362 million in 2022 before returning to a more modest €290 million in 2023. About three-quarters of these imports came directly from developing countries, which is above the European average. This translated to €217 million in 2023. China (62% in 2023), Germany (11%) and India (7.6%) are the leading suppliers.

## Brexit may boost direct trade with the United Kingdom

The United Kingdom is home to the largest bird conservation organisation in Europe: the [Royal Society for the Protection of Birds](#) (RSPB). The RSPB has an impressive 1.2 million members, and about half a million people participate in its annual Big Garden Birdwatch. This makes the United Kingdom a particularly interesting market

for birdhouses.

British imports of decorative objects returned to €268 million in 2023, after peaking at €376 million in 2022. 81% of these imports came directly from developing countries, which is the second largest market share in Europe. China is the leading supplier making up 72% of imports. [Brexit](#) may stimulate direct imports from developing countries, allowing British buyers to avoid additional fees now that the UK is no longer part of the EU's single market.

### Italy's imports have recovered from dip

Italy's bird conservation organisation, [LIPU](#) (Lega Italiana Protezione Uccelli), has 30,000 supporters. Italy's economy was particularly affected by the pandemic, which was reflected in the country's decorative object imports in 2020 (down 18% compared to the European average of -10%). However, imports have since recovered. They grew from €126 million in 2019 to €148 million in 2023, at a CAGR of 4.1%.

Direct imports from developing countries made up about two-thirds of the market, which is comparable to the European average. They returned to €98 million in 2023, which is comparable to 2019. China (50% in 2023) and Vietnam (9.4%) are its leading suppliers.

### Spain's imports perform well after large drop

Spain's [SEO Birdlife](#) is a bird conservation organisation with about 21,000 members. The country is the sixth largest European import market for decorative objects. Like Italy, the country was hit hard by the COVID-19 pandemic as its economy experienced the largest drop in Europe (-31% compared to the European average of -10%). Spain's imports of decorative objects have since recovered. They grew from €115 million in 2019 to €126 million in 2023, at a CAGR of 2.3%.

In 2023, about three-quarters of Spain's decorative object imports came from developing countries directly, which is above the European average. China is the main supplier (63% in 2023), followed by France (4.6%) and India (4.2%).

#### 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 or pose threats in the European birdhouse market?

The market for birdhouses is shaped by various trends, which are often related to the [trends for HDHT](#) at the sector level. Key topics are wellness, 'home sweet home' and sustainability.

### Wellness: closer to nature

Wellness is a dominant consumer trend. European consumers are constantly trying to improve themselves, in body and mind. [Two-thirds of consumers are more conscious of looking after their physical and mental health](#) than they were before the COVID-19 pandemic. In fact, [more than 67% of people worldwide say they make wellbeing a top priority](#). At the same time, 44% feel it is impossible to achieve, and only 12% said they thought their level of wellbeing was where it should be.

A key part of the wellness trend involves urban consumers getting in touch with nature, both inside and outside the home. Closeness to nature makes them feel healthier and more relaxed. Scientific research confirms that [watching birds in your garden or neighbourhood is good for your mental health](#). Many consider it a form of meditation due to the relaxing effect of birdsong and the quiet focus of birdwatching.

## Birdhouse building kits

Offering consumers a relaxing, creative activity and an opportunity to learn new skills, Do-It-Yourself (DIY) [birdhouse building kits](#) fit the wellness trend well. Assembling and [painting](#) a birdhouse kit can also be a fun and educational activity for consumers and their (grand)children. Flat-packed kits are efficient to transport as well.

### Tips:

Include tips on where to place birdhouses and how to clean them on the packaging. Also include information on, for example, the types of birds your products are suitable for and when the breeding seasons are.

If you offer birdhouse building kits, include clear instructions.

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

## Home sweet home: birdwatching from your cocoon

In this trend, the people's homes function as shelters. Core to this is the idea of 'cocooning'. This is the need to surround yourself with people and things you love inside the warmth and familiarity of your own home. This also applies to the garden and balcony, which have become an extension of the home. These consumers make their homes a retreat from a stressful world and decorate their outdoor spaces to match the indoor style.

The COVID-19 pandemic strengthened this trend, increasing the focus on the home and garden. In addition, people of all generations experienced the joys of birdwatching during lockdowns. In a British survey, [63% of people said watching the birds and hearing their song had added to their enjoyment of life](#) since the beginning of the COVID-19 pandemic. [58% of British households with outdoor space feed wild birds](#), with the percentage varying from 43% among 16-24-year-olds to 71% among 65-74-year-olds. Apps like [Birda](#) help birdwatchers identify species and log sightings and are popular amongst [Millennials](#) and [Gen Z](#).

Figure 6: Big Garden Birdwatch



Source: [Birda @ YouTube](#)

Birdhouses fit in well with the 'home sweet home' trend by providing outdoor decoration and allowing people to enjoy wildlife from the comfort of their home and garden. While nest boxes should mainly be functional with natural colours, birdfeeders and roosting pockets or pouches can be more expressive and decorative. Different designs allow consumers to choose items that meet their needs and potentially fit in with their overall decorating style. This can make birdhouses rather personal. At the same time, they are also popular gifts that allow people to connect.

**Tips:**

Consider both function and decorative value when designing your birdhouses. Keep in mind that brightly coloured and expressive designs are more suitable for birdhouses that serve as temporary shelters, like feeders and roosting pockets/pouches.

Provide options for consumers to attach their birdhouses to balcony railings, drainpipes or even windows, such as straps or suction cups (particularly for birdfeeders).

## **Sustainability: people and planet**

Both the HDHT industry and consumers are becoming more concerned about the environmental and social effects of production and consumption. Sustainability is quickly becoming a central consumer need, including in the HDHT market. European consumers are increasingly adopting more sustainable lifestyles. The COVID-19 pandemic boosted this trend. At the same time, the current cost of living crisis drives the need for sustainable products to be affordable.

The pandemic has made it more important that consumers and companies improve their sustainability, especially for younger generations. An impressive 86% of European consumers consider sustainability (very) important. 29% deliberately buy sustainable products. In addition, most people want significant change to make the world fairer and more sustainable after COVID-19. Millennials and Gen Z will soon be the dominant generation of consumers. They care about sustainability and express this by buying products that contribute to a better world.

Birdhouses fit in well with this trend, creating a greater appreciation of nature and a more modest and focused lifestyle. When a birdhouse is made by hand, from sustainable materials, this further contributes to the concept of sustainability.

Figure 7: Handmade fair-trade bird nesters from seagrass and recycled saris

Source: [Wildlife World @ YouTube](#)

For birdhouses, key topics regarding social and environmental sustainability include:

- Materials: are your materials renewable? Are they traceable and responsibly traded?
- Production process: does production take place in a safe and healthy way? Are your labour contracts fair? Can you reduce your energy use? Can you prevent water, air and soil pollution? Can you reuse waste, either inside the production system or elsewhere? In general, can you ensure low-impact production?
- Transport: do you use clean transport options? Do you pack containers effectively? Are your packing materials recyclable?

### **Upcoming EU sustainability legislation**

The [European Green Deal](#) provides a legal aspect to social and environmental sustainability. The European Commission has started working on various proposals for new and updated green and social

legislation. Particularly relevant proposals for the birdhouse industry include the:

- [Corporate Sustainability Due Diligence Directive](#)
- [Forced Labour Regulation](#)
- [Green Claims Directive](#)
- [Packaging and Packaging Waste Regulation](#)

Well-known sustainable initiatives (e.g. [BSCI](#), [ETI](#), [Sedex](#) and the [WFTO](#) Guaranteed system) and certifications (e.g. [FSC chain of custody certification](#)) can help you prove your sustainability to buyers and consumers.

Consumers' increasingly sustainable lifestyles are reflected in their attitudes towards their outdoor spaces. They consider how they can make their gardens and balconies more inviting to the birds and bees, to contribute to a better climate. In France, for example, [80% of people with a garden use it to help protect the environment and biodiversity](#). 49% already have plants, shelters or insect hotels in their garden to attract pollinators. For these consumers, functionality is a must when buying a birdhouse.

Tips:

Use recycled or sustainably produced natural materials, like responsibly produced wood. Also look into other ways to reduce your impact on the environment, for example in your production or transport.

Clearly communicate your sustainable values and practices through your marketing materials. These do not need to be perfect, but giving your buyers specific information can help greatly. If your products have a unique origin or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to both your concept and your buyer's.

Consider certification if your importer is interested. For more information about this and the upcoming EU sustainability legislation, read our studies on market entry for birdhouses and [buyer requirements for HDHT](#).

Consider diversifying into [shelters for other animals](#), like bee hotels. These can appeal to environmentally conscious consumers who are interested in nature conservation, as well as add further decoration.

For more information, see our special [study on sustainability in HDHT](#), our [tips to go green](#) and [tips to become socially responsible](#), and our [webinars on sustainability in the European HDHT market and sustainable innovations for your HDHT business](#).

## Example product

The [Tahera artisan bird nester](#) is a WFTO fair trade product. It can serve as a roosting place and nesting site. Artisans in Southern Bangladesh make these nesters by hand from hogla grass and recycled saris using a metal framework. Because the abundant hogla grass is considered a weed, using it as raw material for these products is a particularly welcome and sustainable option. The nesters have metal hooks and a long loop so they can be fastened securely.

Globally Cool B.V. carried out this study in partnership with Remco Kemper and GO! GoodOpportunity on behalf of CBI.

Please review our [market information disclaimer](#).