

The European market potential for pet furniture

Last updated:

03 September 2024

As the European pet population grows, so does the market for pet furniture. In addition to being functional, pet furniture has also become more decorative. People often consider their pets family, and their furniture should fit in with the overall style of the home. Common types of pet furniture include beds, sofas and baskets. For cats, 'caves' and hammocks are popular too. Sustainability has become more important. Incorporating wellness and playfulness into your designs could also offer opportunities.

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1. Product description

In the Home Decoration and Home Textiles (HDHT) segment, there are several [categories made up of various product groups](#). Pet furniture is included in the furniture and lighting category, and it mainly consists of items for cats and dogs. Pet furniture provides pets with their own place to rest. It includes products like pet beds, pillows, sofas, baskets, houses and 'caves'.

This study focuses on items for cats and dogs and uses the following codes to indicate trade in pet furniture:

Table 1: Product codes

Harmonised System (HS)	Description
4602 11	Basketwork, wickerwork and other articles made directly to shape from bamboo plaiting materials
4602 12	Basketwork, wickerwork and other articles made directly to shape from rattan plaiting materials
4602 19	Basketwork, wickerwork and other articles made directly to shape from other vegetable plaiting materials
4602 90	Basketwork, wickerwork and other articles made directly to shape from non-vegetable plaiting materials

9403 20	Metal furniture, excluding furniture for offices, seats and medical, surgical, dental or veterinary furniture
9403 60	Wooden furniture, excluding furniture for offices, kitchens and bedrooms, and seats
9403 70	Furniture made using plastics, excluding medical, dental, surgical or veterinary furniture, and seats
9403 82	Furniture made using bamboo, excluding medical, surgical, dental or veterinary furniture, and seats
9403 83	Furniture made using rattan, excluding medical, surgical, dental or veterinary furniture, and seats
9403 89	Furniture made using other materials, including cane, osier and similar materials, excluding furniture made using bamboo, rattan, metal, wood and plastics, seats, and medical, surgical, dental or veterinary furniture
9404 90	Articles of bedding and similar furnishing, fitted with springs or stuffed, or internally filled with any material or of cellular rubber or plastics, excluding mattress supports, mattresses, sleeping bags, pneumatic and water mattresses, blankets, covers, quilts, bedspreads, eiderdowns and duvets ('comforters')

These HS codes cover baskets and furniture in general because no specific trade data are available for pet furniture.

Functionality

First and foremost, pet furniture must be functional. It should provide the animal a place to retreat and rest, which feels both safe and comfortable. The furniture should also be easy to clean and durable, and items for outdoor use should be weather resistant. Taking functionality a step further, orthopaedic pet furniture should provide optimal support and can improve pets' posture. At the same time, pet furniture has also become another way to accessorise the home, combining functionality with decorative value.

Figure 1: Cotton rope cat basket designed in collaboration with a cat behaviourist

Source: [Laroy Group & YouTube](#)

Material

Since the product group is quite varied, the materials are too. Materials for pet furniture can range from textiles and natural fibres to recycled synthetics. For optimal functionality, materials should be animal-safe, comfortable, easy to clean and durable. Their look and feel are key for their decorative value.

Size

Pet furniture must be designed to suit animals of different heights and weights. Exact dimensions vary, but a diameter of 45 cm is generally suitable for average-size dogs, while cats need about 30 cm. Options in size (S, M, L) are important to cater for smaller and larger breeds.

Design

Common types of dog and cat furniture include beds, sofas and baskets. Roofed and hooded designs provide extra shelter and privacy. For cats in particular, cat caves and hammocks are also popular. Their decorative value is increasingly important, allowing consumers to match their pet furniture to the overall style of their interior. This can include aspects like trend colours, craftsmanship and environmental friendliness.

Figure 2: Flatpack pet house of recycled PET in three sizes

Source: [Rexproduct @ YouTube](#)

2. What makes Europe an interesting market for pet furniture?

The European market for non-food pet-related services and products has grown considerably, along with the European pet population. Cats and dogs are the most popular pets.

Source: FEDIAF

[The European market for pet-related services and products \(excluding food\) had an estimated value of €24.5 billion](#) in 2022, up from €18.5 billion in 2018. Generally, 40–46% of this is made up of pet accessories, like furniture.

Approximately 46% of all European households have a pet. This translates to about 91 million households with a combined 340 million pets in 2022, compared to about 290 million in 2018. Cats and dogs are the most popular; 26% of European households have at least one cat, and 25% have at least one dog. In total, there are around 127 million pet cats and 104 million pet dogs in Europe.

The following statistics cover baskets and other furniture in general because no specific trade data are available for pet furniture.

Source: UN Comtrade

European imports of the selected product groups that may include pet furniture grew from €21 billion in 2019 to €23 billion in 2023, at an average annual rate (CAGR) of 3.1%. This included a peak of €28 billion in 2022. About 40% of Europe's import value came directly from developing countries. These imports grew from €8 billion in 2019 to €8.7 billion in 2023, at a CAGR of 2.0%. This makes Europe an interesting market, although pet furniture makes up a relatively small part of these imports.

The COVID-19 pandemic and the war in Ukraine have disrupted international trade, affecting the cost and availability of raw materials, energy and transport. The COVID-19 lockdowns led to an increased focus on the home and pets, as many people turned to animals for companionship. The pandemic also boosted trends like wellness and 'home sweet home'. Pet furniture fits in with this, which may partially compensate for the pressure that the [cost of living crisis](#) has put on consumer spending. In a February 2024 survey, [European consumers stated that they generally planned to maintain spending on pet food and supplies](#). See the chapter on [trends](#) for more drivers of demand.

Tips:

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

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

3. Which European countries offer the most opportunities for pet furniture?

The larger Western European economies are the main importers of pet furniture. 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: [FEDIAF Facts & Figures 2022](#)

France, Germany, the United Kingdom, Italy, Poland and Spain are home to most pet cats and dogs.

Source: UN Comtrade

In 2023, Germany remained Europe's leading importer of the selected product groups that may include pet furniture with 18% of imports, followed by the United Kingdom (13%) and France (13%). 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 the Netherlands (8.3%), Spain (5.3%) and Switzerland (5.2%). Focus on segments

European countries have different roles in the HDHT market. Some are mainly importers and others are mainly manufacturers. Western European countries are mainly importers, and most Western European importers are re-exporters. They 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 pet furniture). Every European country has these segments, although their size may vary. As such, it makes much more sense to focus on a segment in your product group and connect with importers in that segment. These importers will then sell your products in that segment across Europe.

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Consumer spending is under pressure

Pet furniture 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 the situation has improved since then, 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 was growing 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 the selected product groups that may include pet furniture is Germany. The country's imports of the selected product groups that may include pet furniture grew from €3.8 billion in 2019 to €4.1 billion in 2023, at a CAGR of 1.9%.

42% of this came directly from developing countries, which is comparable to the European average. These

imports grew from €1.4 billion in 2019 to €1.7 billion in 2023, at a CAGR of 5.3%. China (29%) and Poland (25%) are Germany's main suppliers.

Germany is also home to Europe's largest cat and dog population, which grew from 24 million in 2018 to 26 million in 2022. This increase equates to 15 million cats and 11 million dogs. This large domestic market, Germany's role as a trade hub and relatively high imports from developing countries make it an interesting market.

Brexit may boost direct trade with the United Kingdom

British imports of the selected product groups returned to €3 billion in 2023 after peaking at €4.1 billion in 2022.

60% of these imports came directly from developing countries, which is the largest market share in Europe. China (45%) is the leading supplier, followed by Poland (8.4%), Italy (5.9%) and Vietnam (5.8%). [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.

The United Kingdom is home to Europe's second largest pet cat and dog population, which grew from 16.5 million in 2018 to 25 million in 2022; 12 million cats and 13 million dogs. This makes the United Kingdom a particularly interesting market for pet furniture.

France increases its imports from European suppliers

France's imports of the selected product groups grew from €2.6 billion in 2019 to €2.9 billion in 2023, at a CAGR of 3.3%. Since 2020, France has increased its imports of these products from European trade hubs like Germany, Belgium and the Netherlands. This may have been an effect of the international trade disruptions after the outbreak of the COVID-19 pandemic.

The direct import market share of developing countries dropped from 44% in 2019 to 36% in 2023, as imports declined from €1.1 billion to €1 billion. The leading suppliers are China (23% in 2023), Italy (13%) and Germany (11%).

The pet cat and dog population in France grew from 20.5 million in 2018 to 22.5 million in 2022; 14.9 million cats and 7.6 million dogs. This makes France a promising market, especially for cat furniture.

The Netherlands is an important European trade hub

Dutch imports of the selected product groups grew from €1.7 billion in 2019 to €1.9 billion in 2023, at a CAGR of 3.8%.

The direct import market share from developing countries reached 35% in 2023, which is below the European average. This translated to €672 million in 2023. China (21%), Germany (17%) and Belgium (12%) are the leading suppliers.

The number of pet cats and dogs in the Netherlands is relatively small, at 3.4 million in 2022; 1.9 million cats and 1.5 million dogs. As the country is an important European trade hub, most of its imports are re-exported across the continent. This could make the Netherlands an interesting market for you.

Spain's imports perform well after large drop

Spain was hit hard by the COVID-19 pandemic as its economy experienced the largest drop in Europe. Since then, its imports of the selected product groups have recovered. They grew from €1 billion in 2019 to €1.2 billion in 2023, at a CAGR of 6.6%.

In 2023, 43% of Spain's imports came directly from developing countries, which is slightly above the European average. China (29%), Italy (17%) and Poland (12%) are the leading suppliers.

The pet cat and dog population in Spain grew from 9.4 million in 2018 to 15.2 million in 2022; 5.9 million cats and 9.3 million dogs. This could make Spain particularly interesting for cat furniture.

Switzerland increases its imports from developing countries

Switzerland's imports of product groups that include pet furniture grew from €1 billion in 2019 to €1.2 billion in 2023, at a CAGR of 4.6%.

Direct imports from developing countries grew strongly from €188 million in 2019 to €249 million in 2023, at a CAGR of 7.3%. However, at 20%, their market share continues to be below the European average. The leading suppliers are Germany (30%), Italy (18%) and China (12%).

The number of pet cats and dogs in Switzerland grew from 2.1 million in 2018 to 2.3 million in 2022; 1.8 million cats and 0.6 million dogs.

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 pet furniture market?

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

Home sweet home: cocooning with your pets

This is a trend in which the home functions as a shelter. Products are often marketed to older consumers with relatively high disposable income. This consumer makes their home a retreat from the stressful world outside by creating a comfortable, luxurious interior. However, 'home sweet home' is also about families or groups of friends enjoying each other's company, entertaining, cooking, dining or just relaxing. Pets also play an important role in this, offering companionship and a way to connect. Having a pet can also teach children a sense of responsibility.

The COVID-19 pandemic has strengthened both the luxury and the cocooning aspects of inside living. People also spent more time bonding with their pets during the lockdowns. In a British survey, [more than 90% of respondents said their pet helped them cope emotionally with the lockdowns](#). The [European pet population boomed in 2020](#), and it has continued to grow since. In a recent IKEA report, [more people had pets at home \(34%\) than children under 18 \(32%\)](#).

To fit in with the 'home sweet home' trend, pet furniture must have decorative value. Designs should allow consumers to express their personal style. They can fit in with the overall style of the furniture or stand out more as functional decorative accessories. The use of natural materials to create texture and a sense of closeness to nature is thus a key product trend. For textiles, softer tones and expressive prints with brighter palettes are popular.

Figure 8: Luxury cat furniture set with felt, cork and powder-coated metal

Source: [LucyBalu @ YouTube](#)

The humanisation of pets

One important trend is the humanisation of pets, especially among younger generations. According to a worldwide survey, [59% of participants think of their pets as family members](#). An estimated [61% of European millennials and Gen Z have pets](#). They take their relationship with them very seriously, often referring to themselves as 'pet parents'.

This was reflected in a British pet owners survey, in which [82% of Gen Z respondents said they had a pet to have something to look after](#), compared to 57% of Baby Boomers. For 88% of Millennials and 82% of Gen Z, their pet completed their family - this was also true for 78% of Baby Boomers. Across the generations, more than 90% agreed that they had a pet as a friend. As such, people often feel that pets deserve the same level of care and luxury as humans.

Figure 9: Dining With Your Dog | IKEA Everyday Rituals

Source: [IKEA Canada @ YouTube](#)

Tips:

If you produce furniture, add complementary pet furniture to your range. For example, many of the [luxury pet sofas at DFS](#) match their 'human' sofas and are made with the same techniques.

If you specialise in specific materials or techniques, use them to produce pet furniture in addition to your main offer. For example, if you work with rattan, you could develop rattan pet homes.

Stay updated on pet care trends, for example via trade fairs (e.g. [Interzoo](#) and [Zoomark International](#)), sector associations (like [FEDIAF](#)), magazines and newsletters.

Wellness: pets and health benefits

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 consider 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.

Pets play an important role in this. Scientific research confirms that [pets reduce loneliness, depression, stress and anxiety](#). They also encourage social interaction and exercise, especially dogs. This way, having a pet offers people both mental and physical health benefits.

Pet wellness

With the humanisation of pets comes increased attention to pet wellness. This mainly relates to functionality. Orthopaedic pet furniture provides optimal support and can improve pets' posture. For example, a clinical study reported that the Big Barker bed [can improve dogs' quality of life](#). Like their human counterparts, good orthopaedic pet beds should contain materials like memory foam to relieve pressure and evenly distribute the pet's weight. [Raised pet beds can also benefit their physical and mental wellness](#).

Tips:

Take pet wellness into account when designing your pet furniture. It should offer pets a safe and comfortable place to retreat and rest and provide sufficient support even if the furniture is not specifically marketed as orthopaedic.

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

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.

Although a lot of pet furniture is still mass-produced from synthetic materials, sustainability has become more important. PETS International, Yummypets and the Pet Sustainability Coalition collaborated on a survey about sustainability among European pet owners. [60% agreed that it is 'very' to 'extremely' important that pet companies are sustainable](#). Only 2% considered it not at all important. Participants also claimed they were willing to pay more if products are truly contributing to sustainability.

For pet furniture, key topics regarding social and environmental sustainability include the following:

- Materials: are your materials renewable? Are they traceable and responsibly traded? If you use furs or skins, do they comply with [CITES](#) and are they cruelty-free?
- 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?

Handmade and more craft-oriented pet furniture is on the rise. With the humanisation of pets, standards are becoming higher. To match the overall look and feel of the items in the home, pet furniture requires similar levels of craftsmanship. Handmade furniture has a personal touch, authenticity and differentiation.

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 topics for the pet furniture industry include the:

- [Revision of the Textile Regulation](#)
- [Deforestation Regulation](#)
- [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.

Tips:

Use recycled or sustainably produced natural materials, like responsibly produced wood. Also look into other ways to reduce your impact on the environment, such as in your production or transport. For example, [MyAlpaca](#) handmakes dog beds and cushions from the leftovers of the alpaca wool they use in their duvets and pillows.

Ensure that your pet furniture can be recycled by making it easy to disassemble, avoiding chemicals that can prohibit recycling and/or avoiding mixed fibres in textiles.

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 on this and the upcoming EU sustainability legislation, see our [studies on market entry](#) for pet furniture and the [buyer requirements for HDHT](#).

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](#).

Playfulness: fun for people and pets

Dogs and cats are fun to have as pets, and this often shows in the design of their furniture, which can be quirky and playful too. Anything goes for consumers who are as playful as their pets. Think of odd shapes; dog beds

shaped like doughnuts or suitcases. Joke shapes do well too, such as UFO and shark-shaped cat beds. Fancy or even couture pet beds in the style of famous high-end furniture brands can add a touch of glamour. Cute travel solutions include dog backpacks and car seats, complete with safety belt.

Figure 10: Rocket cat tree

Source: [Pewos @ YouTube](#)

Modular furniture can add surprise and variety and allow cats to climb up and monitor the home or nap. Suspended cat rests, in the form of hammocks or [tents](#), help pets relax while swaying midair. Recycling can be fun too, like dog beds made from [recycled socks](#). Clever multipurpose designs can also have fun aspects, like cat beds that can be mats, and cat caves that can also be used as sleeping bags. Integrated furniture for people and pets, such as a pet bed under a side table or inside the armrest of a couch, can also be interesting.

Tips:

Do not mix pets' need to rest with playtime when creating a fun design. A pet's place to retreat and rest must be exactly that, rather than an item that triggers their instinct to play.

Be aware that being playful in design, especially by making use of funny shapes and figuration, can just as easily put consumers off as attract them. If humour is not in your brand's DNA, you may want to avoid too many novelty products. For example, [Katon](#) specialises in cardboard cathouses that are both environmentally friendly and fun for cats and people.

Make sure that functionality and craftsmanship remain the foundation of your positioning, especially in the mid-high and upper segments, as playfulness can sometimes be associated with low prices.

Example company

[Bangladesh Artisans Home Décor Ltd.](#) produces high-quality home and garden products, including pet furniture. They use native, natural fibres, such as jute, seagrass and sweetgrass. They have a dedicated design team that strives to keep their offer current. Their pet beds come in basket styles, with neutral woven designs. The company is [BSCI](#) and [Sedex](#) certified, meaning they comply with these initiatives' widely accepted standards on sustainability practices. They are included in Messe Frankfurt's [Ethical Style Guide](#) because of this approach.

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

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