

The European market potential for watering cans

Last updated:
03 December 2024

Europe is an interesting market for watering cans. A growing interest in green outdoor spaces and plants may boost consumer demand. Most Europeans have a garden or balcony, and many have houseplants that (also) need watering. Consumers use plants to make their home and outdoor space cosier, and to feel close to nature. Plants also have a positive effect on people when working from home. As watering cans can be both functional and decorative, you can add value with design and sustainable elements.

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1. Product description

A watering can is a portable container with a handle and a spout, used to water plants and fill and refill vases by hand. They serve to water houseplants and flowers in the home, or outdoor plants in the garden or on the balcony.

In Home Decoration and Home Textiles (HDHT), there are several [categories consisting of various product groups](#). Watering cans are categorised as garden products.

This study uses the following code to indicate trade in watering cans:

Table 1: Product code

Harmonised System (HS)	Description
8424 82 10	Agricultural or horticultural watering appliances

Because no specific trade data are available for watering cans, this HS code covers agricultural or horticultural watering appliances.

Functionality

Although the main – and original – purpose of watering cans is to water plants, they can be both functional and decorative. Rather than being stored in a cupboard or garden shed, they can be displayed on a shelf or in the garden. Nevertheless, functionality should be your priority when designing a watering can.

Watering cans for indoor use often have a narrow spout. This allows consumers to direct the water flow near the

base of the plant and avoid spilling onto another surface. For outdoor use, wide-spout cans can be convenient to quickly saturate the ground around the plant. They may also come with a removable sprinkle or rose attachment to gently disperse water around delicate plants and avoid damaging them. Larger (outdoor) watering cans may have 2 handles: 1 along the back and 1 across the top for balance and control.

Material

Watering cans are usually made of metal, ceramic or plastic. Materials like wood can be used for handles. Lightweight plastic watering cans offer convenience, and recycled plastics meet the growing need for sustainable alternatives. Heavier metal cans are particularly useful for outdoor use, as they are less likely to be blown away on windy days. Galvanising and powder-coating can protect them from corrosion.

Ceramic, glass or copper designs may offer additional decorative value. They are less sturdy and may be prone to damage, making them especially suitable for indoor use.

Design

Purely functional watering cans can be relatively basic in design. Ergonomic handles and extra-long spouts can offer additional convenience. More decorative cans can vary in terms of shapes, decorations and combinations of materials. Plant misters often come in dainty, romantic designs and more delicate materials like glass or copper.

Figure 1: Stainless steel watering can and plant mister with acacia wooden accents

Source: Audo Copenhagen @ YouTube

Size

Watering cans generally have a capacity ranging from 500ml for houseplants up to 12l for garden use. More decorative plant misters also come in smaller sizes, like 250-500ml.

2. What makes Europe an interesting market for watering cans?

Europe is an interesting market for watering cans. An estimated [82% of Europeans have a garden or a balcony at home](#). In October 2023, [74% of specifiers noted an increasing demand for green outdoor spaces / terraces in residential projects](#). This offers opportunities. Imports of agricultural or horticultural watering appliances have grown in recent years, with a peak in 2022.

Because no specific trade data are available for watering cans, the following statistics cover agricultural and horticultural watering appliances.

Source: UN Comtrade & ITC TradeMap

European imports of agricultural or horticultural watering appliances grew from €432 million in 2019 to €555 million in 2023. They peaked at €607 million in 2022. This translates to an overall average annual rate (CAGR) of 6.5%. Imports from developing countries fluctuated, before reaching €72 million in 2023. As a result, their direct market share decreased from 18% in 2019 to 13% in 2023. It should be noted, however, that these data also include industrial agricultural and horticultural appliances.

The COVID-19 pandemic and the war in Ukraine have disrupted international trade, affecting the cost and availability of raw materials, energy and transport. At the same time, lockdowns led to an increased focus on the home and garden. The pandemic has also boosted trends like wellness and 'home sweet home'. Watering cans fit in with this by allowing consumers to connect with nature, as well as having decorative value. This may, or to some degree, compensate for the pressure that the so-called [cost of living crisis](#) puts on consumer spending. For more drivers of demand, see the chapter on [trends](#).

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 watering cans to appeal to European consumers.

3. Which European countries offer the most opportunities for watering cans?

The larger Western European economies are the main importers of watering cans. However, importers in these countries generally sell their products across Europe. Your best strategy is therefore to focus on a particular segment, rather than a specific country.

Because no specific trade data are available for watering cans, the following statistics cover agricultural or horticultural watering appliances.

Source: UN Comtrade & ITC TradeMap

In 2023, France remained Europe's leading importer of agricultural or horticultural watering appliances with 15% of imports, followed by Romania (14%), Spain (10%) and Germany (10%). Together, they accounted for about half of the European total. Smaller markets with a share of less than 10%, but still in the top 6 of leading importing countries, are Italy and the Netherlands with 8.5% each.

Because these data also include industrial agricultural and horticultural appliances, they do not accurately reflect the imports of watering cans for domestic use. In this context, Romania is likely a less relevant market. Instead, the United Kingdom could offer opportunities despite having a relatively modest import market share of 3.4%.

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 do not just sell their products in their own country, but they distribute them across the continent. This explains why, in HDHT, small countries like the Netherlands often import much more than they consume.

In terms of marketing, you should know that countries are not markets. The HDHT market consists of different segments, ranging from low to high-end (see our study on market entry for watering can). Every European country has these segments, although their sizes may vary. Therefore, it makes much more sense for you to focus on a segment in watering cans and connect with importers in that segment. These importers will then sell your products in that segment across Europe.

Consumer spending is under pressure

Watering can 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 such non-essential products tend to rise.

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the following energy crisis. Although it has improved since then, consumer confidence still scores below its 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. Due to the pandemic, 2020 broke this trend. In 2021, growth bounced back into positive figures. Forecasts for 2024/2025 are modest, reflecting consumer confidence.

France is Europe's largest importer

France's imports of agricultural or horticultural watering appliances grew from €63 million in 2019 to €81 million in 2023, at an average annual rate (CAGR) of 6.7%. This included particularly strong growth in 2021, when imports peaked at €88 million. An estimated 81% of French people have a garden or balcony at home. During the gardening season, from March to October, most [spend an hour or more per week gardening](#). This makes France an interesting market for watering cans.

Imports of agricultural or horticultural watering appliances from developing countries were relatively stable at about €20 million, with a strong peak of €30 million in 2023. Their direct import market share of 24% in 2023 is

well above the European average.

Spain's imports from developing countries are modest

Spain's imports of agricultural or horticultural watering appliances have fluctuated considerably. Overall, this resulted in a decline from €63 million in 2019 to €57 million in 2023, despite peaking at €77 million in 2022. This translated into a CAGR of -1.9%.

The direct imports of agricultural or horticultural watering appliances from developing countries followed a similar pattern, reaching €4.2 million in 2023. Their market share fluctuated between 7.2% and 10%, which is below the European average. Most Spanish people (an estimated 56%) have a garden or balcony at home, which could offer opportunities.

Germany is an important European trade hub

Germany's imports of agricultural or horticultural watering appliances peaked at a strong €70 million in 2020, which could be related to the country's role as a European trade hub. This may have boosted Germany's performance during the COVID-19 pandemic. Since then, imports have steadily returned to their pre-pandemic level of €55 million in 2019. Of the €54 million in 2023, €6.6 million came directly from developing countries. This represents a market share of about 12%, which is comparable to the European average.

It is estimated that about 85% of Germans have a garden or balcony at home. During the gardening season, most [spend 2 hours or more per week doing garden work](#). Combined with Germany's role as a trade hub, this potentially large domestic market offers opportunities.

Italy's imports have grown

Italy's imports of agricultural or horticultural watering appliances grew from €34 million in 2019 to €47 million in 2023, at a CAGR of 9.0%. This included a peak of €51-54 million in 2021-2022. An estimated 82% of Italians have a garden or balcony at home. During the gardening season, most [spend an hour or more per week working on their garden](#). This offers potential.

The direct imports of agricultural or horticultural watering appliances from developing countries reached €6.6 million in 2023. This represents a market share of 14%, which is comparable to the European average.

The Netherlands is another key trade hub

The Netherlands is another important European trade hub. This could make the country an interesting market for you. Following impressive growth in 2020, Dutch imports of agricultural or horticultural watering appliances stabilised at about €48 million. This translated to a CAGR of 6.8% between 2019 and 2023.

Imports of agricultural or horticultural watering appliances from developing countries fluctuated, reaching €4.9 million in 2023. As a result, their direct import market share varied as well. It amounted to 10% in 2023, which is below the European average. Nevertheless, the country may offer opportunities for domestic watering cans. An estimated 95% of Dutch people have a garden or balcony at home, which is the highest share in Europe. Most [spend an hour or more per week on their garden](#).

Brexit may boost direct trade with the United Kingdom

British imports of agricultural or horticultural watering appliances grew from €13 million in 2019 to €19 million in 2023, at a strong CAGR of 10%. This included particularly strong growth in 2022, when imports peaked at €21 million. In 2023, 37% of imports came directly from developing countries – almost triple the European average. These imports grew from €5.0 million in 2019 to €7.0 million in 2023, at a CAGR of 9.8%.

[Brexit](#) may stimulate direct imports from developing countries, allowing British buyers to avoid additional fees now that they are no longer part of the EU's single market. In addition, 91% of Brits are estimated to have a

garden or balcony at home. [42% garden as a hobby](#) and spend on average 2 hours per week working on their garden. Watering plants takes about 45 hours per year. Altogether, this makes the United Kingdom a promising market for domestic watering cans.

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 watering can market?

The market for watering cans is influenced by various trends, often related to the [trends for HDHT](#) on a 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, both in body and mind. [Two-thirds of consumers are more conscious of looking after their physical/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.

The pandemic has also made [consumers realise how plants and flowers make being in their home more pleasant](#). This fits in with a key part of the wellness trend - urban consumers getting in touch with nature, both inside and outside the home. Closeness to nature makes them feel healthier and more relaxed. Houseplants are popular, especially evergreen and hardy plants with strong sculptural forms that require a minimal amount of care. Consumers use them to create a garden inside the home. For the home office, a green environment is recommended as a way to boost productivity. [Most people feel that plants and flowers have a positive effect when working from home](#) - especially millennials.

Figure 5: Calming your mind and brightening your home with flowers

Source: [IKEA Canada @ YouTube](#)

Consumers also enjoy their outdoor spaces – they eat, drink, relax and entertain outside, and design and decorate these spaces accordingly. [Working in the garden is also relaxing and fun](#), and it offers a good way of being active outdoors. Watering cans can play an important role in this context. They can add decoration and help consumers grow ornamental plants and herbs or vegetables. And, in addition to being used for relaxation and entertainment, gardens are also used by [68% of French people to change their eating habits](#).

Tips:

Your watering cans should be accompanied by tips on gardening, growing your own food or how to create and maintain your indoor garden.

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

Home sweet home: plants make the home cosier

In this trend, the home functions as a shelter. At the heart of this is the idea of ‘cocooning’ – the need to surround yourself with people and things you love, inside the comfort and familiarity of your own home. These consumers make their home a retreat from their stressful daily lives. The COVID-19 pandemic has strengthened this trend, increasing the focus on the home and garden.

Plants play a key role in making the home cosy. This also applies to the garden and balcony, which have become extensions of the home. Consumers now decorate their outdoor spaces in a style that matches the

indoor style. Watering cans can contribute to the atmosphere as well, with design elements like shape, colour, texture and dimension. Plants can also be a welcome addition to home offices, now that many people work from home.

Tips:

Offer designs with a retro touch to tap into the 'home sweet home' trend.

Consider both function and decorative value when designing your watering cans.

Carefully select your market segment(s), because the older 'home-as-a-shelter' customer is less price-sensitive than the younger consumer.

Sustainability: people and planet

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

Since the start of the pandemic, younger generations in particular find it [increasingly important that consumers and companies improve their sustainability](#). An impressive [86% of European consumers consider sustainability \(very\) important](#). [29% deliberately and consciously 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 generations of consumers. They care about sustainability and express this by buying products (from companies) that contribute to a better world.

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

Figure 6: Watering cans made from 100% recycled post-consumer plastic packaging waste

Source: [ferm LIVING @ YouTube](#)

For watering cans, 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 usage? Can you prevent water, air and soil pollution? Can you reuse waste, either within 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](#) also 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 watering can industry include the:

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

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

At the level of material use, there are lots of options based on recycled post-industrial or post-consumer waste.

This can range from watering cans made from recycled plastics to plant misters made from recycled glass. Potentially damaging materials such as plastic can also be replaced by 'new plastics' made from eco-friendly materials.

Tips:

Use sustainable solutions for raw materials, production, transport and distribution, consumer use and waste disposal.

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 them greatly.

If your products have a unique origin and/or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to your concept, and that of your buyer.

If your importer is interested, consider certification. For more information on this and the upcoming EU sustainability legislation, see our studies on market entry for watering cans and [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](#).

Example product

Dutch web shop Seda's Miracle offers a range of African [fair trade watering cans](#) in various styles and colours. The cans are handmade from recycled plastic. They are designed to be both functional and decorative, with their quirky teapot and coffeepot shapes. Seda's Miracle clearly communicates that the exact shape and details of the watering cans may differ due to their handmade character.

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

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