Csil



INSIGHTS ON THE EUROPEAN FURNITURE INDUSTRY

International Hardwood Conference, Antwerp, 5 November 2026

ABOUT CSIL

Independent research and consulting company specialised in applied economic research, with a core unit dedicated to furniture, lighting and furnishings.

1980
founded in Milan

100+
markets monitored for furniture, lighting and furnishings

Market research

Multiclient reports on production, trade, distribution and leading companies, by country and segment.

Custom research

Studies on demand for companies and institutions: market selection, competitors, channels, strategy.

Industry studies and forecasts

Sector competitiveness and cluster analysis; data and forecasts for the world's main furniture markets.

Evaluation and policy analysis

Support to the public sector in designing, analysing and evaluating policies and programmes.

Source: CSIL, www.csilmilano.com and www.worldfurnitureonline.com.

EUROPE'S FURNITURE SECTOR AT A GLANCE

PRODUCTION Europe as an industry

25% of world furniture production, a stable share over the years

€104 bn production value 2025

88% of production is sold in Europe



EU27 + UK, NO, CH

CONSUMPTION Europe as a market

28% of world furniture consumption

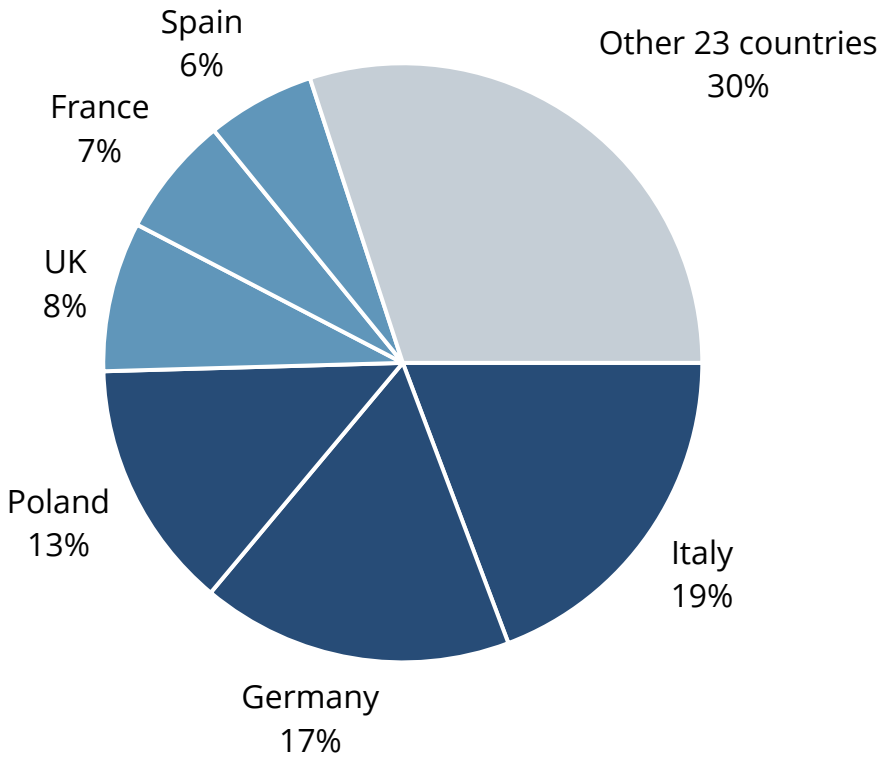
€110 bn consumption 2025

78% of consumption is supplied by European producers

Source: CSIL, The Furniture Industry in Europe (January 2026).

FURNITURE PRODUCTION WITHIN EUROPE

Furniture production by country, 2025
% of European total.

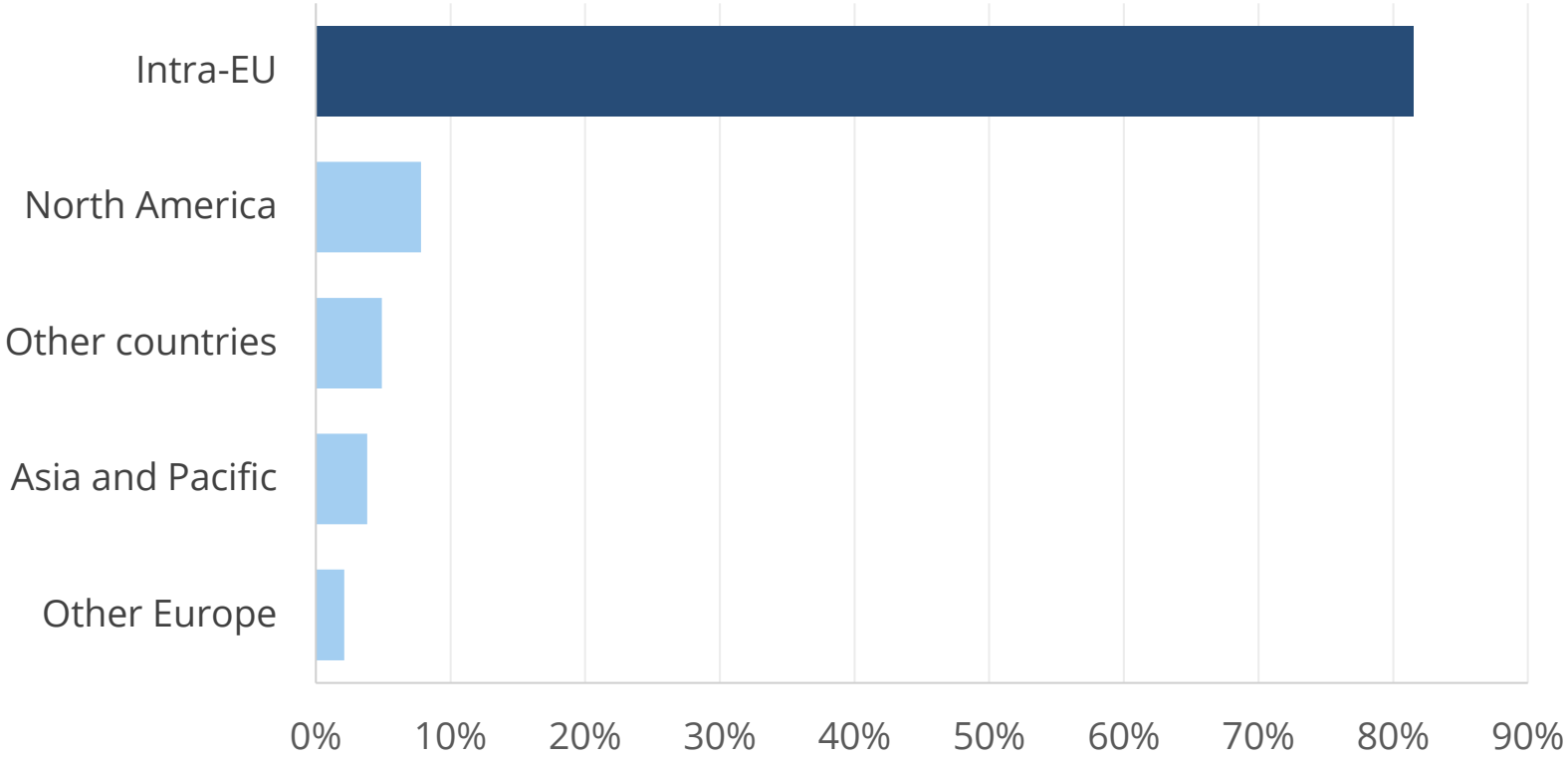


- **Italy, Germany and Poland** produce half of European furniture
- With the UK, France and Spain, the **top 6 reach 70%**
- The top 3 are also the largest exporters, with over 50% of European exports

Source: CSIL, The Furniture Industry in Europe (January 2026). 2025: preliminary estimates.

EUROPEAN FURNITURE EXPORTS

Furniture exports by destination area, 2025
% of total European exports



KEY FACTS

- Most of export is within Europe
- North America: over 40% of extra-European exports

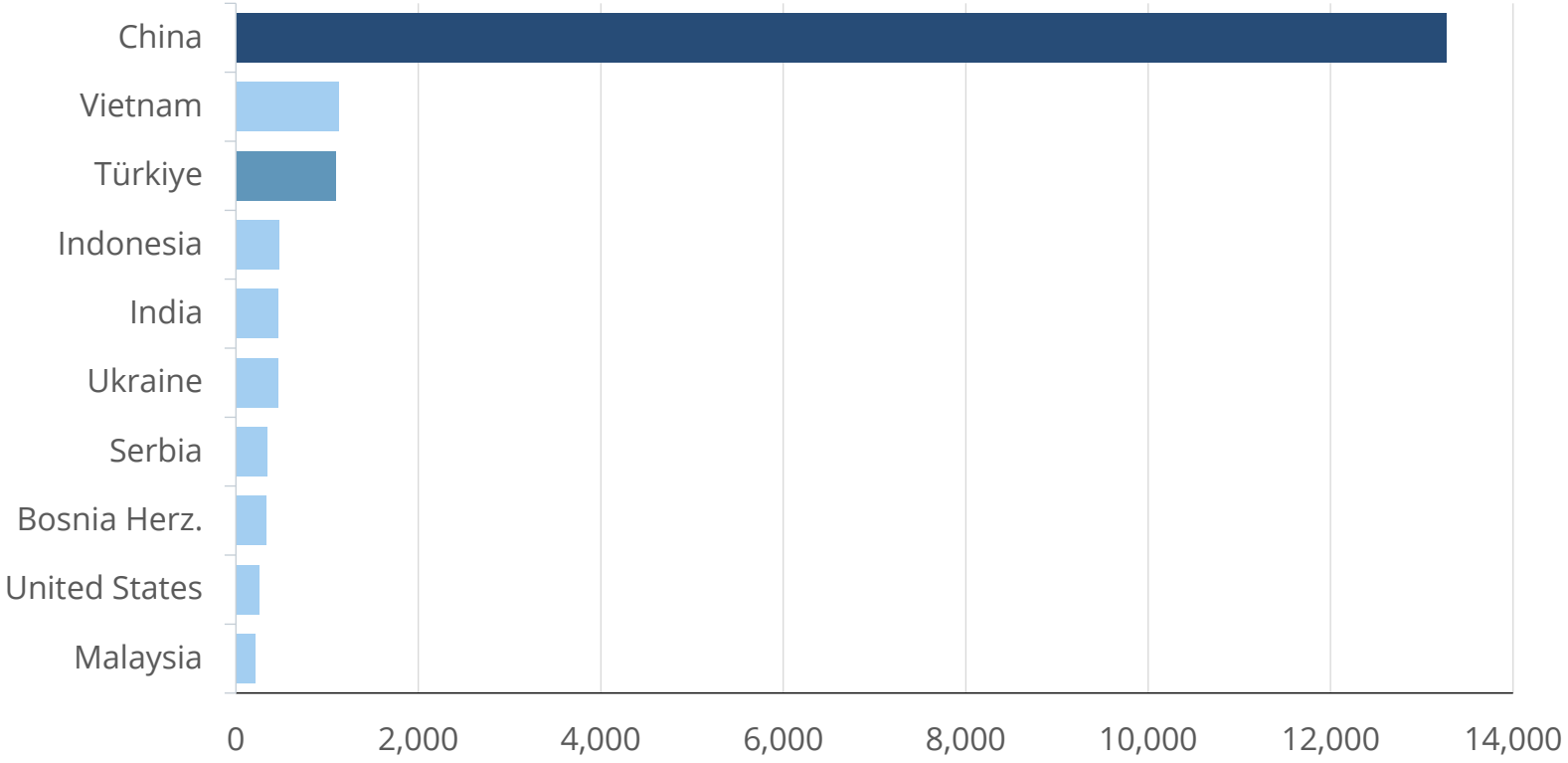
DRIVERS AND BARRIERS

- Trade tensions and US tariffs

Source: CSIL, The Furniture Industry in Europe (January 2026). 2025: preliminary estimates.

EXTRA-EUROPEAN IMPORTS

Top 10 extra-European suppliers, 2024
Home furniture imports into Europe, EUR million



Source: CSIL, The Furniture Industry in Europe (Jan 2026); CSIL, Furniture Retailing in Europe (Feb 2026).

KEY FACTS

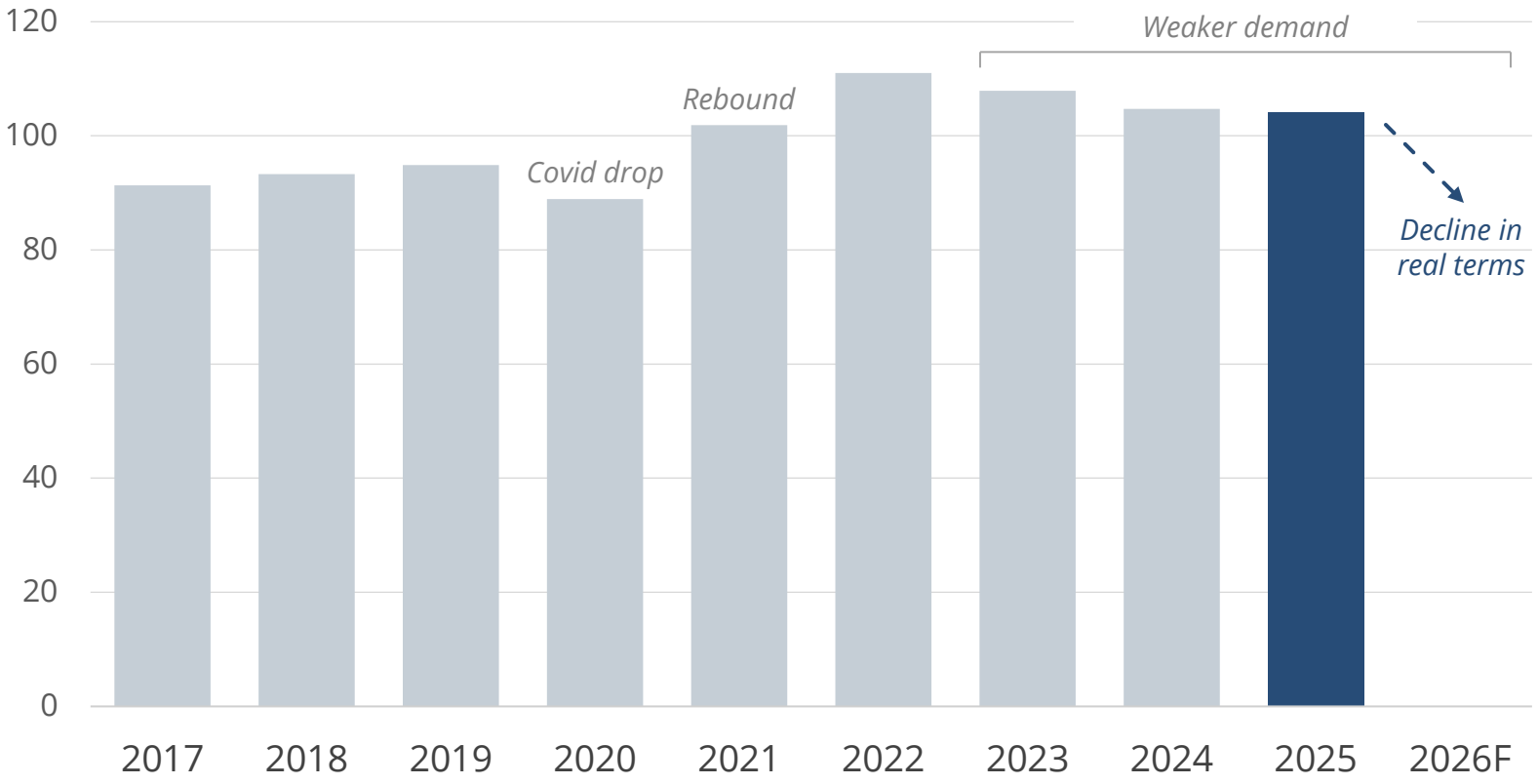
- Over 20% of European consumption comes from outside Europe (higher than 2019)
- China = 70% of extra-European imports
- US tariffs on Chinese and South-East Asian redirecting low-cost products towards Europe

DRIVERS AND BARRIERS

- Price pressure
- customisation, regulations

FURNITURE PRODUCTION TREND

Total furniture production, Europe
EUR billion, current prices



Source: CSIL, The Furniture Industry in Europe (January 2026). Current EUR.

- Significant volatility in recent years
- 2026 production forecasted to decrease in real terms. The European market is still marked by challenging conditions:
  - Weak consumer confidence
  - Subdued housing market
  - Conflicts and geopolitical tensions
  - Trade tensions with the US
- Cost pressures
- Increasing pressure from extra-EU import after 2020

TRENDS ACROSS ALL FURNITURE SEGMENTS

Evolving Living Spaces



Multifunctional spaces

Modular, reconfigurable pieces; home office in the living room



Indoor / outdoor

Outdoor furniture takes on indoor comfort and finishes

Human-Centred & Material Design



Wellness

Comfort, ergonomics and sensory quality of materials



Naturalness and authenticity

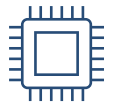
Natural materials, or surfaces that evoke them

Technology Integration



Integrated lighting

Light becomes part of the furniture design



Smart integration

Technology built in and kept out of sight

KEY TRENDS BY FURNITURE SEGMENT (*selected examples*)

Kitchen

Opening onto the living room

- **60%** of new Italian kitchen projects open onto the living room (2025); appliances concealed
- **Continuous surfaces** and finishes coordinated with the living area
- **Super-matt, soft-touch** fronts with anti-fingerprint treatment
- **Porcelain stoneware** worktops

Office furniture

Domestic look, hybrid work

- **Domestic look** in lounge and collaborative areas
- **Lounge seating**: the fastest-growing type of seating
- **Phone booths**: production value up fourfold in five years
- **Height-adjustable desks**, foldable and wheeled tables

Source: CSIL, The European Market for Kitchen Furniture, 2026; The European Market for Upholstered Furniture, 2026; The European Market for Office Furniture, 2026; Il Mercato Italiano dei Mobili per Cucina, 2026

KEY TRENDS BY FURNITURE SEGMENT (*selected examples*)

Bedroom

Storage built into the walls

- **Modular wardrobes** and walk-in closets merge with **boiserie and fitted walls**
- **Tactile surfaces**: fluted panels, slats and embossed finishes on wardrobe doors
- **Rounded** headboards and beds

Living room

Units that organise the space

- **Shelving and fitted walls** organise and divide the space
- **Rounded** shapes and **tactile surfaces**
- **Extendable tables** and coffee tables for flexible use
- **Wood combined** with marble, ceramic, glass and metal

Contract

Requirements vary by destination

- **Hotels and yachts**: customisation, perceived quality, **premium materials**
- **Yachts**: coatings and finishes with specific performance, e.g. anti-corrosion
- **Retail**: simple furniture with built-in lighting and displays

KEY TAKEAWAYS

- **A large customer base:** Europe produces EUR 100 billion of furniture
- **Competition from imports:** European makers compete on quality, design and customisation, not on price
- **A market that stays in Europe:** 4 in 5 euros of furniture exports go to other European countries; North America is the main market outside
- **Cautious investment:** over 60% of furniture makers are cutting or postponing some investments in 2026, mostly plants and hiring; product innovation is protected
- **Natural materials and surfaces in demand:** naturalness and tactile finishes among design trends, e.g. fluted panels, slats and boiserie; wood often combined with stone, ceramic and metal
- **Sustainability becomes a requirement:** sustainable materials rank among the top investment priorities; EUDR and ecodesign will require traceable wood and reliable data from suppliers

SOURCES AND CONTACTS

CSIL REPORTS USED IN THIS PRESENTATION

- **World Furniture Outlook 2026**, June 2026
- **The European Market for Office Furniture**, June 2026
- **The European Market for Kitchen Furniture**, May 2026
- **The European Market for Upholstered Furniture**, May 2026
- **The Italian Market for Kitchen Furniture**, April 2026
- **Furniture Retailing in Europe**, February 2026
- **The Furniture Industry in Europe**, January 2026

CSIL CONTACTS

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THANK YOU

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