

Exporting stuffed toys to Europe

The European market for stuffed toys is growing. Most imports originate from developing countries. The middle market has the most potential. Using natural fibres such as bamboo, wool or cotton is a good way to appeal to this segment. Innovation by combining materials and/or hand-made and mechanised processes allows you to develop premium lines. Working with sustainable materials and co-creation can give you a competitive edge.

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1. Product description

Stuffed toys are products made out of textile fabrics or yarns and stuffed with a soft material, intended for use in play by children. They come in many different forms, often resembling animals, human beings, legendary creatures, cartoon characters or inanimate objects. Stuffed toys are also known as plush toys, plushies, stuffed animals, soft toys or cuddly toys.

This study uses the following codes to indicate trade in stuffed toys:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
9503 0041		Stuffed toys representing animals or non-human creatures
	32 40 12 00	Toys representing animals or non-human creatures

Quality

Functionality

Stuffed toys are often used as comfort objects and are popular gifts. Although they are designed for children, stuffed toys don't have to be exclusively intended for playing purposes. They can have a decorative function as well, in which case they can be used for display or collecting.

Material

Common textiles used for stuffed toys are plain cloth and pile textiles, such as plush or terrycloth. Knitted or

crocheted stuffed toys made out of woollen, acrylic or cotton yarn have also gained in popularity. Common stuffing materials are synthetic fibre wadding, cotton wadding, straw, woodwool, plastic pellets or beans.

Design

The quality and finishing of the material is especially important for the middle and high-end market, as this largely determines the toy's appearance. The finishing of your toys is key.

Labelling

External packaging labels for stuffed toys should include: producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

The most important information on the product or packing labels of stuffed toys is: composition, size, origin and care labelling. For more information, refer to the chapter on buyer requirements.

Packaging

You should pack stuffed toys according to the importer's instructions. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining. It should be easily manageable in terms of size and weight and ideally fit together on European pallets. If in doubt, check the dimensions with your buyer.

Some buyers may require special consumer packaging for display in shops. If you have access to a type of packaging that matches your chosen market segment, advertise the different possibilities you can offer.

2. Which European markets offer opportunities for exporters of stuffed toys?

European imports of stuffed toys are growing. Around $\frac{2}{3}$ of these imports come from developing countries. Europe's main importers of stuffed toys are the United Kingdom and Germany. The strong performance of products from developing countries makes them especially interesting target markets.

(!) The European production and consumption statistics cover toys representing animals or non-human creatures in general, because the data do not differentiate between stuffed and non-stuffed toys.

Where is consumer demand located?

- European demand for toys representing animals or non-human creatures increased between 2012 and 2016. With an average annual growth rate of 9.0%, it reached €1.6 billion in 2016.
- European demand for toys representing animals or non-human creatures is highest in the United Kingdom at €421 million. Germany follows with €236 million and France with €197 million.

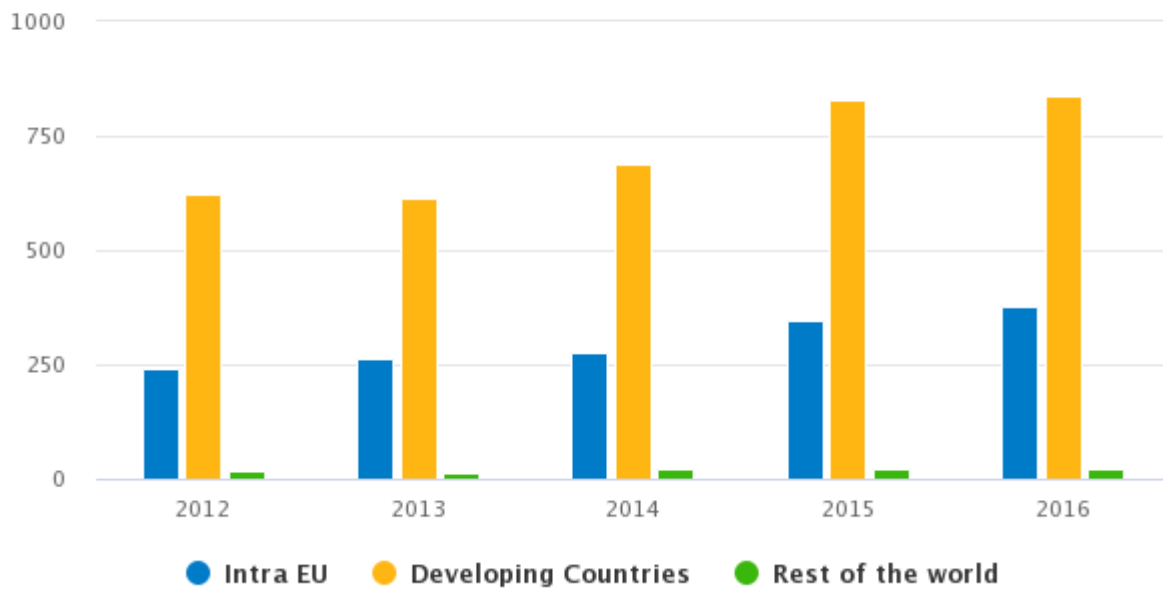
What is the role of European production in supplying European demand?

- European demand for toys representing animals or non-human creatures is considerably higher than its production. This drives the need for imports, making Europe an interesting market for toys representing animals or non-human creatures.
- European production of toys representing animals or non-human creatures was fairly stable around €90 million between 2012 and 2016.
- Germany is responsible for around $\frac{2}{3}$ of European production, France for about $\frac{1}{3}$.

Which countries are most interesting in terms of imports from developing countries?

Figure 1: European imports of stuffed toys 2012–2016

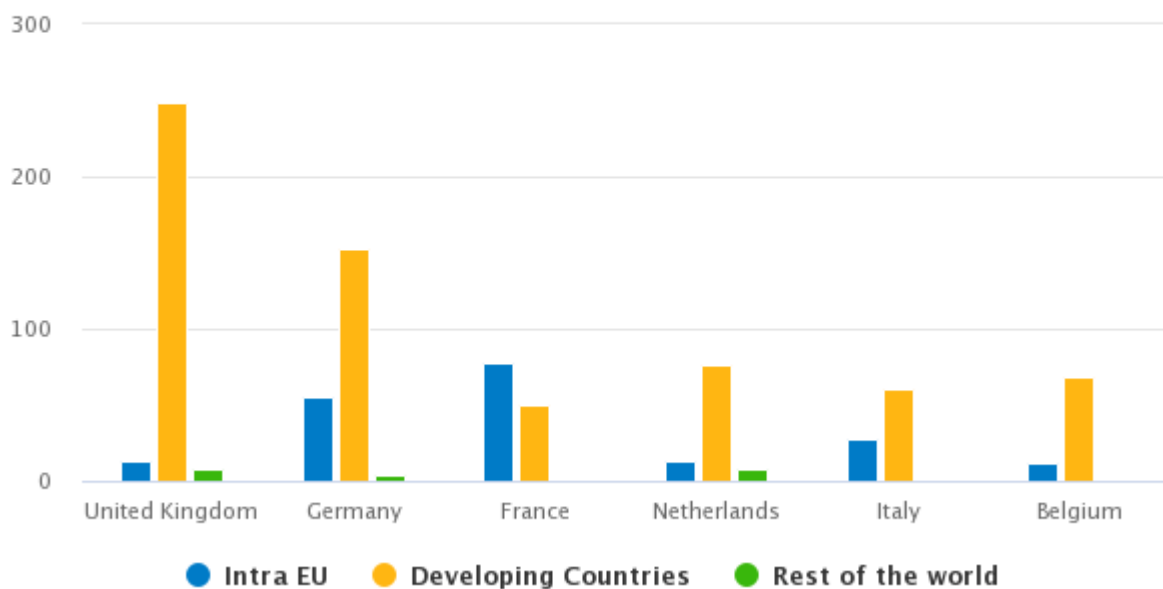
in € million



Source: Trademap

Figure 2: Main importers of stuffed toys 2016

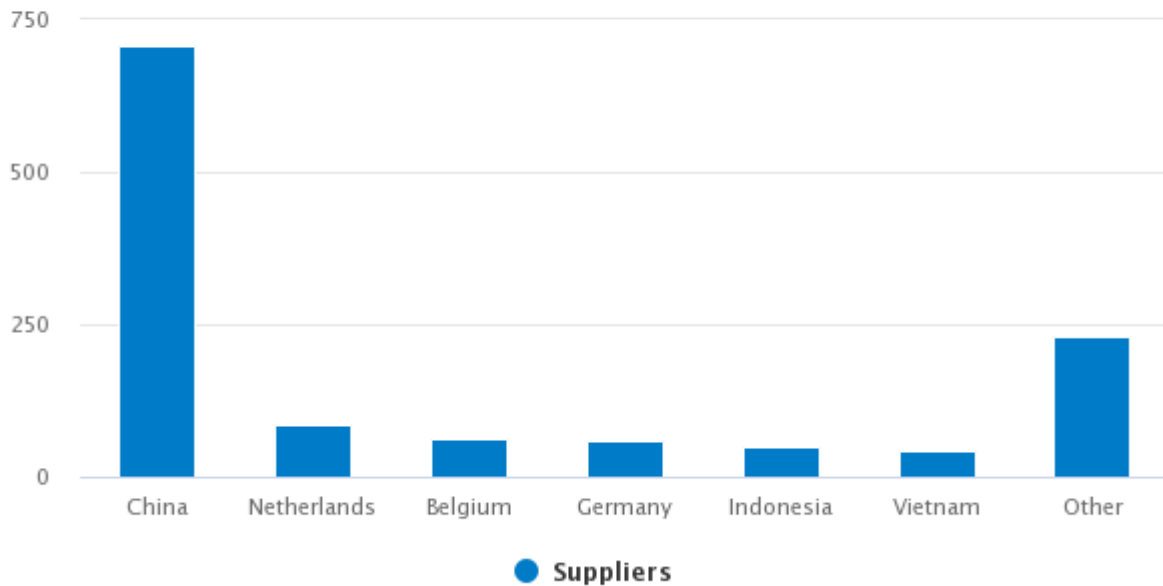
in € million



Source: Trademap

Figure 3: Leading suppliers of stuffed toys 2016

in € million



Source: Trademap

- European imports of stuffed toys increased from €879 million in 2012 to €1.2 billion in 2016. This corresponds to an average annual growth rate of 8.9%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries are Europe's main source for stuffed toy imports. They supply around 2/3, amounting to €836 million in 2016. This share is predicted to stay stable in the coming years.
- In reality, many of the stuffed toy exports from Western European countries are re-exports of products manufactured in developing countries.
- The United Kingdom is Europe's leading importer of stuffed toys, with €271 million in 2016. Germany follows with €212 million.
- These countries are also leading when it comes to imports from developing countries - especially the United Kingdom, which sources 92% of its stuffed toy imports from developing countries!
- The strong performance of developing country suppliers in the United Kingdom and Germany is evidenced further by strong increases between 2012 and 2016. These countries upped their imports from developing countries by €62 million and €38 million respectively.
- China is Europe's leading supplier of stuffed toys with 57% in 2016. Other leading developing country suppliers are Indonesia (3.9%), Vietnam (3.6%), Tunisia (0.8%) and Sri Lanka (0.8%).

Tips:

Study your options in the United Kingdom and Germany. Their strong imports of products from developing countries make them especially interesting markets.

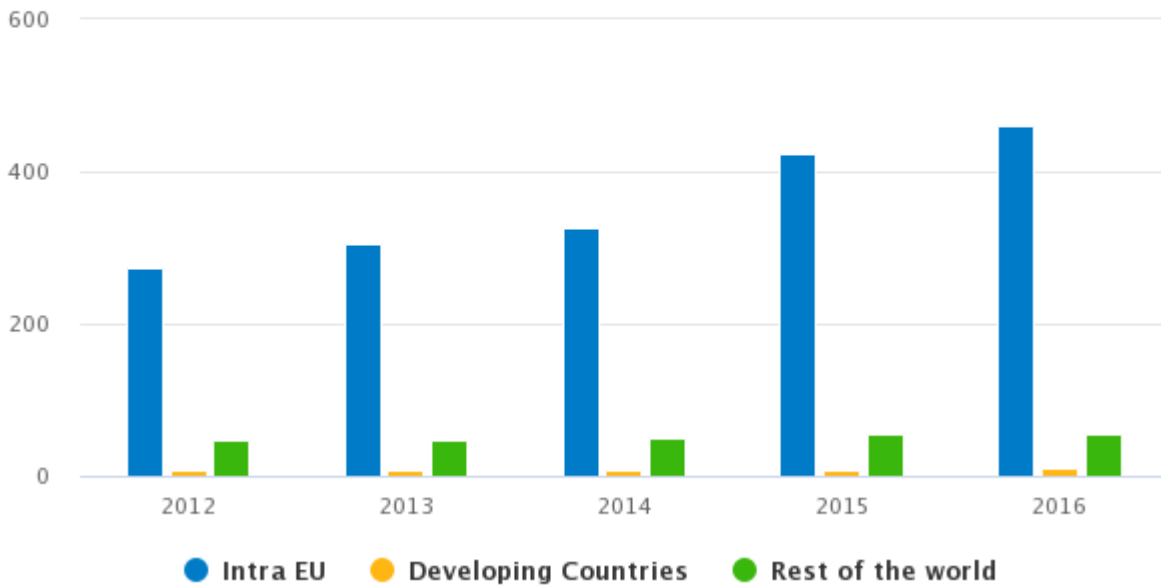
The upcoming [Brexit](#) (the United Kingdom leaving the European Union) has decreased the value of the British Pound. As a result, more British buyers have started importing directly from developing countries, rather than buying from European importers. However, as the situation is still fluid and insecure, you should keep a close watch on the developments.

Compare your products and company to the strong competition from China, as well as Indonesia, Vietnam, Tunisia and Sri Lanka. You can use [ITC Trademap](#) to find exporters per country. You can compare on market segment, price, quality and target countries.

What role do exports play in supplying European demand?

Figure 4: European exports of stuffed toys 2012–2016

in € million



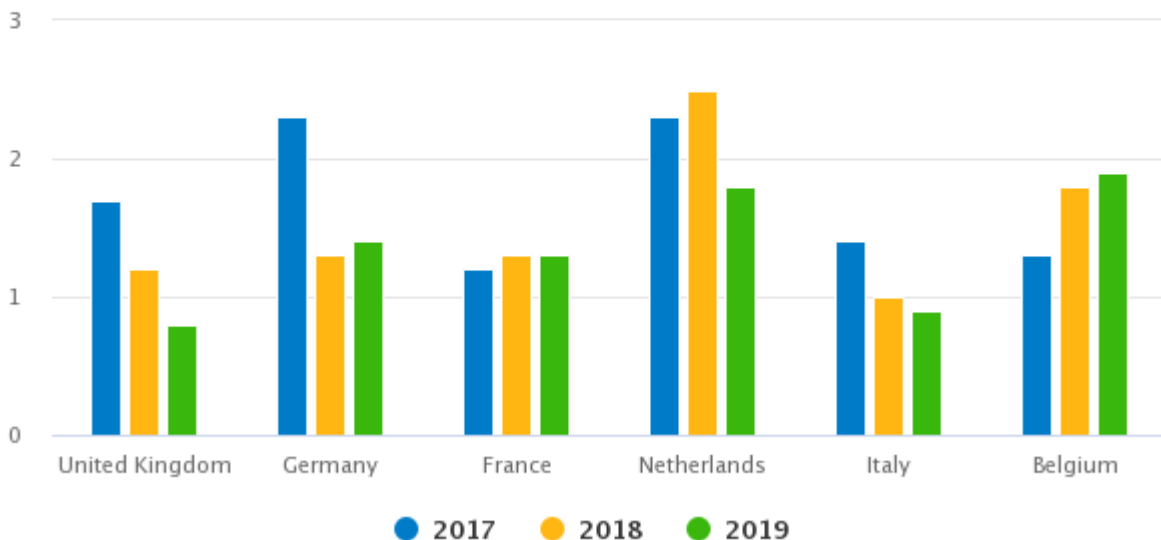
Source: Trademap

- European stuffed toy exports consist mainly of trade within Europe.
- Germany (€103 million), Belgium (€93 million) and the Netherlands (81 million) are Europe's leading stuffed toy exporters. This illustrates these countries' roles as trade hubs within Europe.

What is the effect of real private consumption expenditure on European demand?

Figure 5: Real private consumption expenditure growth 2017–2019

in %



Source: Eurostat

- Private consumption expenditure is an important indicator for the European home decoration market. The

sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.

- Between 2017 and 2019, European private consumption expenditure is expected to increase. This means that consumption of decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on decorating the home. Consumers in mature markets already spend a fair amount of money on decoration, so growth in their consumption will be moderate.

3. What trends offer opportunities on the European market for stuffed toys?

Collecting

A major consumer trend in home decoration, and especially relevant for stuffed toys, is the urge to collect. Consumers want to own complete sets of items, such as wall plates or figurines. This trend also applies to stuffed toys. They are collected and used depending on the mood of the consumer or the occasion (such as Christmas). Consumers may collect various stuffed toys according to style or brand, also for decoration purposes.

Tip:

Offer choice to give consumers sufficient options to develop their own, personal collections.

Sustainability

Consumers and designers are shifting their preferences towards more sustainable choices, especially in the mid-high market segment. There is an increasing concern and awareness of the negative impacts of production and consumption. This is driving the popularity of sustainability labels and commitments in the textile industry.

For stuffed toys, sustainability does not lead to immediate price differentiation and specific communication of the added value remains indirect. However, sustainable options do find a ready market.

Tips:

Communicate the socially and environmentally sustainable aspects of your toys clearly.

For more information, see our special study on [sustainability](#).

Co-creation

European buyers are increasingly trying to distinguish themselves from their competitors. To do so, they focus on their own image and design. They look for producers they can cooperate with to develop their own products, so-called 'co-creation'. This makes it extra important to showcase your special skills, production techniques and the variety of raw materials you work with.

Tips:

Make sure your collection showcases the different materials and production techniques you have to offer.

Emphasise the story behind your product in your promotion strategy.

Consider a co-creation strategy to develop innovative products.

Consider working together with producers of complementary home textile products, to create a more coherent collection.

Smaller quantities and shorter lead times

European buyers change their collection at an increasing pace. As a result, they are looking for shorter lead times and smaller minimum orders. This is a distinct advantage for small to medium-sized producers like you, since you are more flexible and can generally supply smaller quantities than bigger producers.

Tip:

If you are flexible in production and can supply smaller quantities, emphasise this in your promotion.

For more information, see our study about [trends for Home Decoration & Home Textiles](#).

4. What requirements should stuffed toys comply with to be allowed on the European market?

What legal and non-legal requirements must your product comply with?

Toy Safety Directive

The European Union has set specific requirements for toys in the [Toy Safety Directive](#). Stuffed toys need CE marking to be allowed onto the European market. CE marking shows that a product has been assessed before being put on the market and that it meets European safety, health and environmental protection requirements.

Tips:

Study how to meet the requirements of the [Toy Safety Directive](#). For more information, see the [guidance on toy safety](#).

To affix CE marking to your products, follow the steps outlined at [CE marking for manufacturers](#). This provides instructions per product group. For more information, see [CE marking for the toy industry](#).

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including stuffed toys. It states that all products marketed in Europe must be safe to use.

Tips:

Read more about the [General Product Safety Directive](#).

Also use your common sense to ensure normal use of your product does not cause any danger.

The [RAPEX database](#) lists products that the European Union has rejected at the border, or withdrawn from the market. Check the database for similar products for an idea of what issues may arise.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes and certain flame retardants in textile products.

Tips:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Also check out the [information on REACH for companies established outside Europe](#) and the [Questions & Answers on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. You can do so for instance through the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition. These labels should be durable and tear-resistant, securely attached, easily legible, visible and accessible.

Tip:

For more information, see the [Frequently Asked Questions about the Textile Regulation](#).

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). Among other things, it restricts the use of certain heavy metals. Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as packing cases, boxes, crates, drums, (box) pallets and dunnage.

Tip:

Read more in the [overview of EU rules on wood packaging material](#).

5. What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market. Think of sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes:

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company has been audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

Tips:

Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.

Buyers appreciate a good story. If you can show that you value your company's environmental and/or social performance, this may be a competitive advantage. You can do this, for instance, with a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#).

For more information, see our special study on [sustainability in the home sector](#).

6. What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your toys is labour-intensive, for example hand-knotting, fair trade certification can give you a competitive advantage.

Common fair trade certifications are from:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#)

Tips:

Ask buyers what they are looking for. Especially in the fair trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards Map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

Across the home sector, sustainability is gaining ground. Although the actual use of certification is still not widespread in home textiles, there is an increasing interest from buyers.

The [Global Organic Textile Standard \(GOTS\)](#) ensures environmental and social responsibility throughout the production chain. To qualify, textile products must contain >70% organic fibres.

[OEKO-TEX](#) Standard 100 certification guarantees no hazardous chemicals were used during production.

The [EU Ecolabel](#) for textiles focuses on minimising environmental impact at the manufacturing stage.

Tips:

Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.

Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study about [buyer requirements for Home Decoration & Home Textiles](#).

7. What competition do you face on the European stuffed toys market?

The competition for stuffed toys does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).

8. Through what channels can you put stuffed toys on the European market?

The market channels and segments for stuffed toys do not differ significantly from the sector in general.

Market channels

Stuffed toys can be found in a wide variety of shops, ranging from low-end discounters to high-end boutiques. A lot of shops that are not specialised in home textiles or toys also sell stuffed toys, since they are very popular as (small) gifts. Think for instance of gift shops, bookstores and department stores. In the low-end segment, stuffed toys are even sold at supermarkets and petrol stations.

The channels through which stuffed toys are put on the market follow the traditional patterns: import via importers/wholesalers that supply to retailers, and larger retail chains that import themselves. More and more smaller retailers start buying directly from the supplier, especially when it concerns the more high-end stuffed toys.

Tip:

For more information about trading directly with smaller retailers, see our special study about [alternative distribution channels](#).

E-commerce

E-commerce in home textiles is increasing and can help you reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online, shopping around and comparing prices on home textile items. Small (gift) items like stuffed toys are especially suitable for this. To supply e-commerce you must be able to work with individual packing and labelling, as well as limited minimum orders.

Tips:

See our special study about [e-commerce in Home Decoration & Home Textiles](#) for more information.

Target online business-to-consumer retailers if you can meet the additional requirements.

Trade associations and fairs

These trade associations and fairs are useful sources for finding trading partners in Europe:

- [Ambiente](#), Frankfurt, February
- [EURATEX](#), European Apparel and Textile Confederation
- [Heimtextil](#), Frankfurt, January
- [Maison et Objet](#), Paris, January and September
- [Spielwarenmesse](#), Nuremberg, January

Market segments

Stuffed toys are mainly marketed within the lower and middle market segments of the European market. Stuffed toys for the low-end market are characterised by high-volume supplies, with low prices and margins. Stuffed toys in the middle market are fashionable products (mid-low) or added-value products (mid-high).

Chinese high-volume suppliers dominate the lower end of the market. The middle market offers you the most opportunities, especially if you use natural fibres such as bamboo. Innovation by combining materials and/or hand-made and mechanised processes is the way to develop premium lines in a predominantly middle market.

9. What are the end-market prices for stuffed toys?

Table 2 gives an overview of the indicative prices of stuffed toys in the low, middle and high market segments. 'Indicative' is key here, since prices for toys vary depending on manufacturing technique, material, size, design, brand and other ways of value addition.

Table 2: Indicative consumer prices of stuffed toys

	Low-end	Middle-end	High-end
Stuffed toys	€2-€15	€20-€95	€ 100 onwards

The European consumer price of your toys is around 4-6.5 times your selling price. Shipping, import and handling add 15-20%. Wholesalers account for a further 50-90% mark-up. Retailers may add another 90-150% to the price. Finally, European VAT percentages range from 18% in Malta to 27% in Sweden.

Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton have fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.


Tips:


The value perception of your product in the chosen segment determines its price. The quality and price of your toys must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment and adjust your price accordingly.


Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position on the market.

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