



BRUSSELS FURNITURE FAIR – PRESS CONFERENCE 2025

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1. Intro and 2025 figures.

Welcome everyone to the press conference of the Brussels Furniture Fair 2025.

It's great to welcome so many familiar faces and new attendees.

Yesterday marked the start of the 88th edition of the Brussels Furniture Fair. We have been looking forward to this moment for quite a while now and we're probably just as curious as you to see what result this year's efforts will bring.

The final result however will not be known until Wednesday and even the months after. So let's start with what we do already know now.

It is safe to say that the enthusiasm for participating in our fair this year was enormous. We have a total of 235 exhibitors spread over the 7 halls that we occupy here at Brussels Expo. That's an increase of 25 brands compared to last year.

What's very noticeable in particular is the growth of our home brands with 95 Belgians brands represented compared to 83 last year. That's an increase with 14%.

These figures also make that the percentage of manufacturers abroad has decreased, but the absolute number shows that we are in fact growing on an international level.

With the Netherlands, France, Germany and Poland leading the way, brands such as Schramm Betten, Polipol, Benix, Puszman, Le Sommeil Français, Gautier, Sympa, LS Bedding, Bree's new world, RB Collection, Kristensen & Kristensen and Jakobsen Home to name just a few represent a significant increase of the quality to our fair.

What pleases us most though is the enthusiasm radiated by the exhibitors present here.

For us as an organizer, the construction phase of the trade fair is always the ideal opportunity to visit the majority of our exhibitors. During these visits we learn. We learn about how exhibitors have been working towards the start of our fair, we witness new collections and we learn about the latest things on how the market is currently evolving and which paths we should or should not walk.

But what we've noticed this year most of all is the eagerness to begin this fair and the great expectations that come with it. Expectations that stem from the amount of positive responses to the invitations exhibitors sent out to clientele. And the quality of the competition surrounding them.

We notice exhibitors are already pleased to see some expectations coming through before the fair has even started. We say this only to express the positive and constructive way furniture manufacturers are facing the future and the efforts they take to be successful.

From our side we try to walk that same path and find ways to be meaningful for the entire furniture market.

In order to put things into the right perspective we will elaborate further after Filips presentation on the economic conditions in the Belgian Furniture Industry.

Brussels Furniture Fair 2025

Economic Conditions in the Belgian Furniture Industry in 2024 and the First Half of 2025

Belgium's furniture industry is showing resilience and the first signs of recovery – the production capacity utilisation rate is stable again

The Belgian furniture industry

Key figures (2024)

- 667 companies
- 8,739 employees
- Turnover: €2 billion
- Change in activity by value: -7%
- Export share: 57%
- Share of total turnover of the Belgian wood and furniture industry: 33%

Summary of developments in the first half of 2025

- Turnover: €982 million, -5.7% compared to the first half of 2024
- Investments: -2.4% in the first half of 2025; €38.4 million
- Capacity utilisation rate: 83.2%
- Export: -10.1% compared to the same period in 2024. France remains the industry's biggest export market
- Import: -2.3% compared to the same period in 2024

In 2024, the Belgian furniture industry once again experienced a difficult year. For the second year in a row, turnover fell sharply by around -7%, as a result of which total turnover in the sector came to just under the €2 billion mark. In the first half of 2025, the tides were also not in the industry's favour. Turnover fell once again, ending 5.7% lower than in the first half of 2024.

This sustained contraction confirms that the sector is still under pressure, due to relatively weak demand in the construction sector on the one hand and to caution amongst consumers on the other.

The drop could be felt in all product groups. Not one segment was able to counter the downward trend. Office and shop furniture (-8.5%) and mattresses and bed bases (-17.4%) were the most severely affected. Turnover in residential furniture was down by 2.5% and turnover in kitchen furniture declined by 3.5%.

In the absence of any reliable data concerning sales prices, no estimate can be made of the changes in turnover by volume.

Our reference:

Fedustria asbl, the Belgian Federation of the Textile, Woodworking and Furniture Industries
Registered office: Allée Hof ter Vleest 5 - 1070 Anderlecht
info@fedustria.be – www.fedustria.be
Company registration number: 0886.138.352 – RLE Brussels

According to the production index, the production volume fell by 2.1% in the first half of 2025 compared to the same period in 2024.

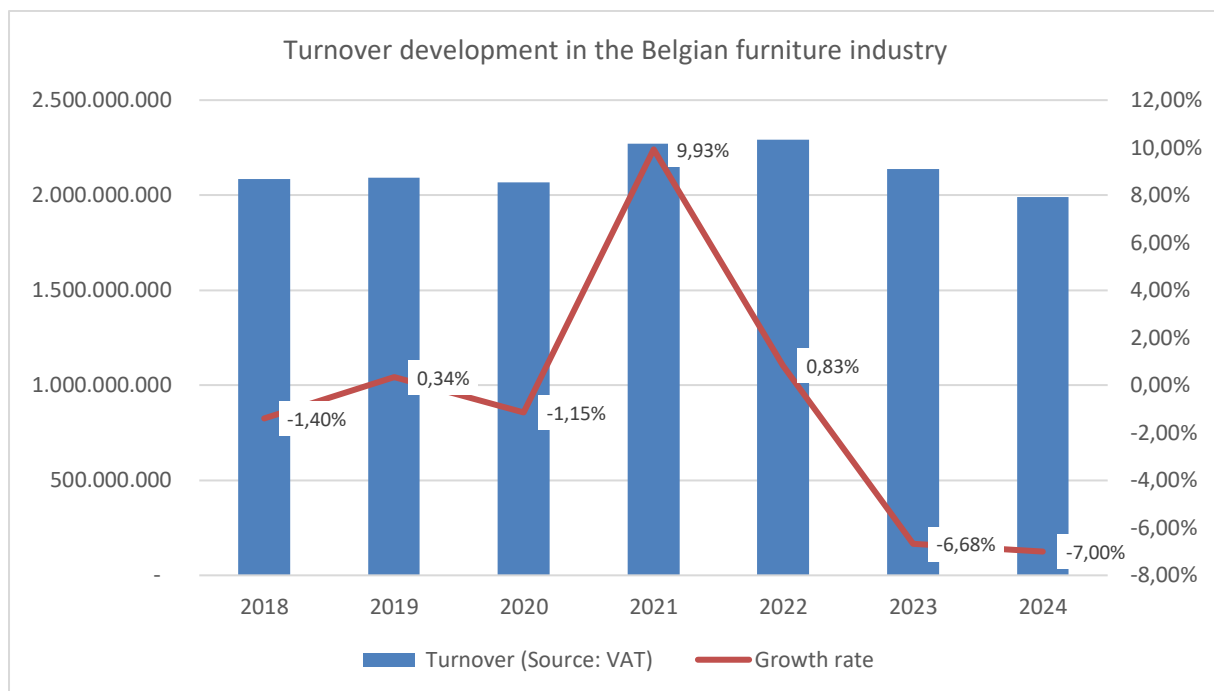
TURNOVER EVOLUTION BY PRODUCT GROUP

	In € millions	Change in value	In € millions	In € millions	Change in value
	2024	'24/'23	6 m. 2024	6m. 2025*	6m. '25/'24*
Chairs and seating, dining room, living room, bedroom, bathroom, garden and outdoor furniture	842.4	-4.1 %	439.9	429.1	-2.5%
Office and shop furniture	433.8	-11.4 %	230.8	211.1	-8.5%
Kitchen furniture	483.0	-6.7 %	253.4	244.5	-3.5%
Mattresses and bed bases	230.0	-8.9 %	118.1	97.6	-17.4%
Furniture industry**	1,989.2	-7.0 %	1,042.2	982.3	-5.7%

* Preliminary data

**Furniture industry NACE 31

Source: FPS Economy, VAT returns



EXPORTS AND IMPORTS OF FURNITURE DECLINED

Belgian furniture exports (including transit trade) fell by 1.5% in 2024 and in the first half of 2025, they decreased significantly by a further –10.1% compared to the same period in the previous year. Around 89% of the country's exports go to the EU market, deliveries to which were down by 8.6%.

Within the EU, the most important export markets changed in a variety of ways. Sales to France, which, at 29.2%, represents Belgium's most important export market, decreased by 10.8%. In Germany, which (at 28.2%) is Belgium's second most important export market, sales increased by 2.2%. Furniture exports to the Netherlands account for 21.5% of exports. Having fallen by 11.6% in 2024, they decreased by a further 9.8% during the first half of 2025.

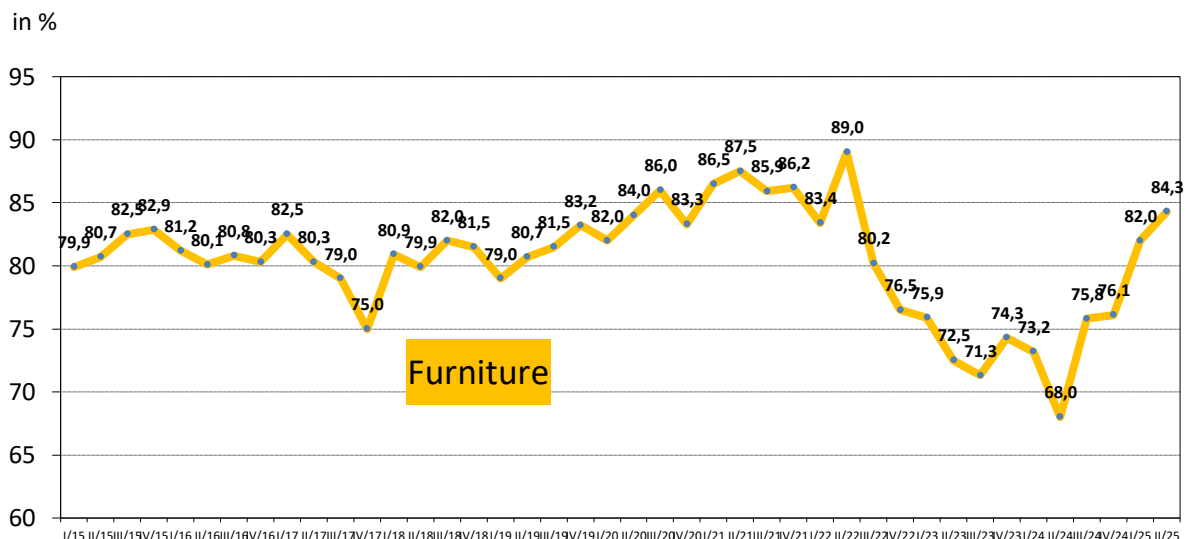
Outside the EU, the United States remained the most important export market (2.9% of exports). In 2024, exports to that country increased by 15.3%, but in the first half of 2025, they fell sharply by 20.9%, for reasons including higher import duties. In the case of the United Kingdom (2.5% market share), exports decreased by around –18%, following an increase of around 12% in 2024.

Furniture imports were 3.6% lower in 2024, but fell by 2.3% in the first half of 2025. Having decreased for two successive years, imports from China increased by 21.2% in 2024. In the first half of 2025, they once again increased significantly by 14.1%. As it accounts for a 32.7% share of imports, China remains the most important and highly dominant supplier of furniture on the Belgian market. Imports of furniture from the Netherlands (14.8% of imports) increased slightly (+1.9%), whilst imports from Germany (10.3% of imports) fell by 14.1%. Poland, which is Belgium's fourth most important supplier and accounts for 9.1% of imports, supplied 6.1% more on the Belgian market.

CAPACITY UTILISATION IS RECOVERING - READINESS TO INVEST REMAINS HESITANT

The production capacity utilisation rate in Belgium's furniture industry fell to 73% on average in 2023 and 2024 – its lowest level in ten years. In the first half of 2025, the production capacity utilisation rate rose above the 80% mark again, reaching 83.2% and enabling the sector to return to a normal level once more.

Whether this increased capacity utilisation rate will translate into an increase in investments is still unclear. In the first half of 2025, investments continued to fall by 2.4%, following a sharp decrease of 16.7% in 2024.



EMPLOYMENT DECLINED ONCE AGAIN

In 2024, 8,739 employees were active in the furniture industry. This represents a decrease of 820 employees or -8.6% compared to 2023. In the first quarter of 2025, employment decreased further: by -4.9% compared to the same period in 2024.

BUSINESS CONFIDENCE INCREASED SUBSTANTIALLY, TO BE FOLLOWED BY A SHARP DECREASE

Synthetic economic trend curve for the furniture industry

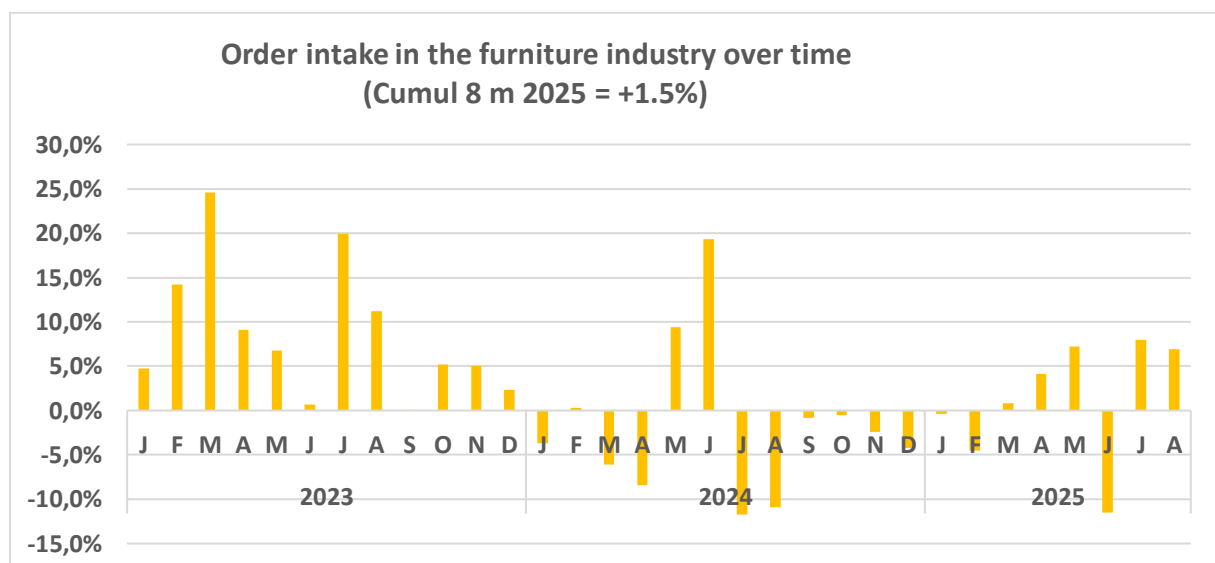


— Seasonally adjusted and smoothed series
 --- Seasonally adjusted gross series

Source: NBB

The economic trend curve for the furniture industry, which represents an important measure of business confidence and is typically about three months ahead of actual economic activity, increased spectacularly from May to August 2025. For the first time in a long while, the curve rose above zero, which means that more business leaders had an optimistic, not a pessimistic, view of future developments in the sector. In September 2025, that number decreased sharply.

DEVELOPMENTS IN THE FURNITURE TRADE



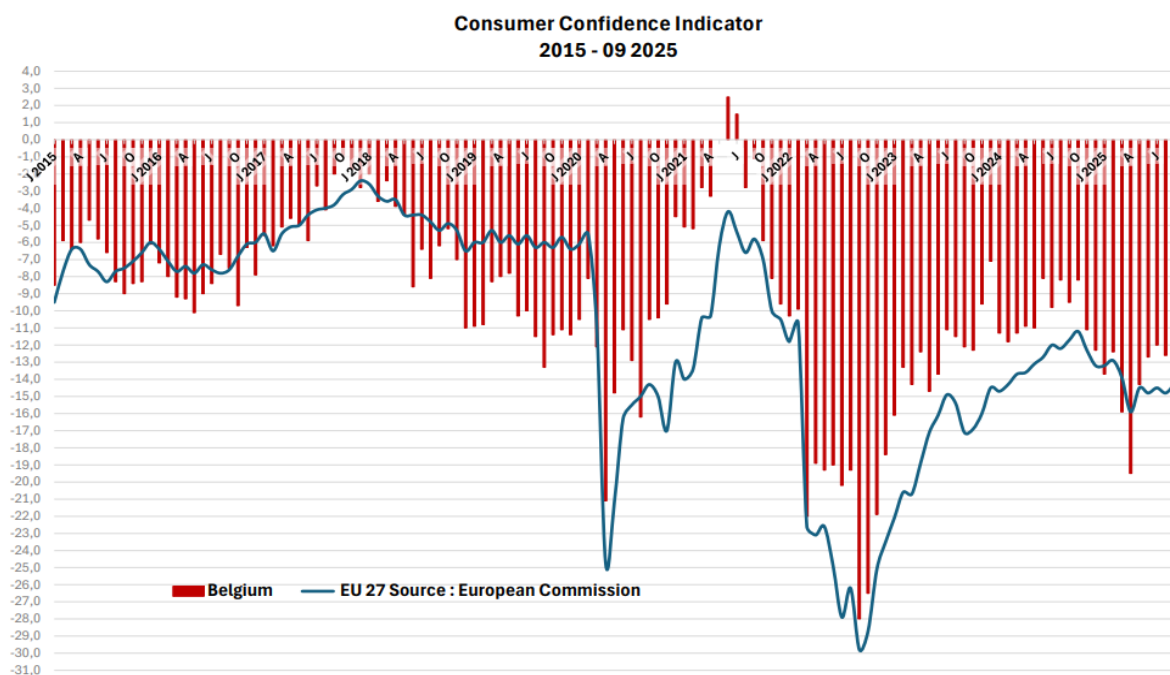
Source: NBB

Order levels in the furniture trade in 2025 continue to be rather low, though a turnaround seems to have begun since the summer months, given that figures for July and August were up, following weak figures in the month of June. Cumulative figures for the first 8 months show that orders were 1.5% higher than in 2024.

OUTLOOK FOR 2025: POSITIVE ON AVERAGE, BUT UNCERTAIN

Consumer confidence is recovering

After an all-time low in mid-2022 as a result of the energy crisis, consumer confidence in Belgium and in Europe recovered in 2023 and 2024. From late 2024 onwards, confidence switched again, as the outlook of consumers in Belgium and Europe became more pessimistic, but since May 2025, an upward trend has been noticeable once more.



A further improvement in consumer confidence in 2025 may have a positive effect on the demand for furniture at home, even though investment growth in housing still remains negative.

International trade: a source of uncertainty

Overall, the trade measures imposed by the USA are putting the brakes on the global economy.

The trade agreement between the USA and the EU limits the tariffs payable on products of European origin to 15%. Exporters from other countries are being subjected to higher tariffs, which could provide Belgian products with a competitive advantage on the US market.

On the other hand, there is a risk that products being subjected to high tariffs may be diverted to the EU market, thereby increasing competitive pressure. Fedustria is therefore also making a case for the necessary market supervision be put in place as a means of avoiding unfair trading practices such as dumping and ensuring that imported products fulfil the standards in force in Europe.

Economic prospects in the eurozone and Belgium

Despite the tense trade situation, the Federal Planning Bureau is forecasting slight economic growth in the eurozone of 0.9% in 2024 to 1.3% in 2025 and 1.4% in 2026, encouraged by budgetary measures and a relaxation of monetary policy.

The growth of the Belgian economy is expected to be relatively stable, from 1.0% in 2024 to 1.2% in 2025 and 1.1% in 2026. In 2025, the primary drivers of growth are consumer consumption and business investments. What is more, government consumption and investments are continuing to increase substantially, especially as a result of increased defence expenditure.

IMPORT and EXPORT FIGURES – 6 M 2025

	Belgian imports				Belgian exports				Coverage- percentage 6m2025 (Exp/imp)
	Part 6m2025 in %	6m2024 1000 EUR	6m2025 1000 EUR	6m 25/24	Part 6m2025 in %	6m2024 1000 EUR	6m2025 1000 EUR	6m 25/24	
European Union	55,0	741.690,6	673.721,7	-9,2	89,3	737.413,2	674.197,0	-8,6	100,1
France	5,6	69.091,4	68.678,0	-0,6	29,2	246.890,1	220.248,1	-10,8	320,7
Netherlands	14,8	177.882,5	181.204,0	1,9	21,5	179.983,0	162.265,3	-9,8	89,5
Germany	10,3	146.987,7	126.249,3	-14,1	28,2	208.415,0	212.918,0	2,2	168,6
Italy	5,4	72.931,1	66.457,5	-8,9	1,5	17.034,4	10.959,4	-35,7	16,5
Ireland	0,0	950,6	486,2	-48,9	1,5	11.576,4	11.000,7	-5,0	2.262,5
Denmark	1,9	62.630,0	23.554,5	-62,4	0,3	2.451,9	2.010,9	-18,0	8,5
Greece	0,0	33,6	91,6	172,3	0,3	2.233,9	1.937,1	-13,3	2.115,0
Portugal	0,3	5.257,5	3.990,3	-24,1	0,5	4.340,1	3.683,2	-15,1	92,3
Spain	0,7	10.694,0	8.373,1	-21,7	1,7	16.740,0	12.679,6	-24,3	151,4
Luxembourg	0,1	286,8	1.180,8	311,7	1,4	11.938,9	10.708,9	-10,3	906,9
Sweden	0,7	11.151,0	8.325,6	-25,3	0,4	3.183,5	2.693,3	-15,4	32,3
Finland	0,3	4.868,0	4.219,7	-13,3	0,1	632,6	624,6	-1,3	14,8
Austria	0,2	3.139,5	2.909,8	-7,3	0,6	6.713,5	4.740,4	-29,4	162,9
Malta	0,0	83,3	170,6	104,8	0,0	507,9	364,5	-28,2	213,7
Estonia	0,1	1.128,2	835,0	-26,0	0,1	407,2	619,4	52,1	74,2
Latvia	0,0	252,2	156,1	-38,1	0,1	196,7	378,4	92,4	242,4
Lithuania	1,9	20.132,2	23.140,8	14,9	0,1	5.085,9	977,3	-80,8	4,2
Poland	9,1	105.388,5	111.845,3	6,1	0,8	7.778,9	6.346,2	-18,4	5,7
Czechia	0,3	8.187,6	3.163,3	-61,4	0,6	6.667,5	4.235,7	-36,5	133,9
Slovakia	0,1	2.358,4	1.796,9	-23,8	0,1	761,5	774,9	1,8	43,1
Hungary	0,7	8.380,7	9.166,7	9,4	0,1	867,1	780,4	-10,0	8,5
Romania	2,1	25.701,5	25.315,8	-1,5	0,2	1.311,2	1.552,1	18,4	6,1
Bulgaria	0,1	2.952,5	1.057,5	-64,2	0,1	317,7	397,4	25,1	37,6
Slovenia	0,0	304,4	297,4	-2,3	0,0	401,1	374,7	-6,6	126,0
Croatia	0,1	909,3	1.055,8	16,1	0,1	553,8	531,9	-4,0	50,4
Cyprus	0,0	8,3	0,1	-98,9	0,1	423,7	394,5	-6,9	428.854,3
Other European countries	5,9	80.058,1	72.612,3	-9,3	4,1	37.224,4	30.745,2	-17,4	42,3
Norway	0,0	38,5	19,4	-49,7	0,2	1.028,0	1.258,4	22,4	6.490,5
Switzerland	0,0	639,3	603,8	-5,6	1,1	11.021,6	8.620,5	-21,8	1.427,7
Turkey	3,7	46.729,1	45.079,7	-3,5	0,1	466,4	442,2	-5,2	1,0
Ukraine	1,0	10.996,4	12.128,9	10,3	0,0	85,1	232,4	173,2	1,9
Serbia	0,5	8.230,2	6.369,6	-22,6	0,0	219,8	124,0	-43,6	1,9
UK (excluding Northern Ireland)	0,5	8.590,1	5.732,1	-33,3	2,5	23.616,0	19.191,0	-18,7	334,8
North America	0,4	3.521,3	4.619,4	31,2	3,1	28.903,7	23.028,5	-20,3	498,5
United States of America	0,3	3.335,7	4.147,2	24,3	2,9	27.374,9	21.665,0	-20,9	522,4
Canada	0,0	185,6	472,2	154,4	0,2	1.528,4	1.363,5	-10,8	288,8
Central and South America	0,1	1.351,6	1.608,6	19,0	0,3	2.077,6	2.467,3	18,8	153,4
Mexico	0,0	349,5	364,2	4,2	0,1	309,3	552,3	78,5	151,6
Brazil	0,1	907,5	1.225,6	35,1	0,1	723,8	863,5	19,3	70,5
Africa	0,1	656,8	750,6	14,3	1,0	12.246,7	7.446,0	-39,2	992,0
Morocco	0,0	232,1	254,4	9,6	0,1	1.166,7	710,4	-39,1	279,3
Cameroon	0,0	24,7	0,2	-99,4	0,1	1.230,9	762,4	-38,1	495.042,2
Congo, D. R.	0,0	0,0	0,1	137,5	0,1	2.699,7	1.086,9	-59,7	1.144.122,1
Middle East	0,5	5.487,1	5.930,4	8,1	1,0	10.096,7	7.260,6	-28,1	122,4
Israel	0,4	4.913,6	5.169,7	5,2	0,4	3.048,3	2.662,2	-12,7	51,5
Saudi Arabia	0,0	4,0	0,3	-91,8	0,2	433,5	1.169,3	169,7	358.666,6
United Arab Emirates	0,0	104,0	18,8	-81,9	0,2	5.165,0	1.693,0	-67,2	9.007,7
Other Asian countries	38,0	422.189,5	466.281,6	10,4	1,0	9.196,7	7.301,6	-20,6	1,6
India	0,8	9.584,1	9.413,2	-1,8	0,0	1.077,6	217,8	-79,8	2,3
Thailand	0,2	1.823,5	2.087,4	14,5	0,1	302,6	390,2	29,0	18,7
Vietnam	1,7	27.054,0	21.363,8	-21,0	0,0	86,0	2,3	-97,3	0,0
Indonesia	2,1	25.696,1	25.696,8	0,0	0,0	182,5	82,9	-54,6	0,3
Malaysia	0,4	4.459,3	4.625,3	3,7	0,0	42,5	81,0	90,7	1,8
China	32,7	350.945,5	400.351,9	14,1	0,3	2.337,4	2.011,9	-13,9	0,5
Japan	0,1	944,6	782,7	-17,1	0,1	1.279,9	1.016,2	-20,6	129,8
Hongkong	0,0	264,5	140,2	-47,0	0,2	1.284,0	1.476,5	15,0	1.053,1
Oceania	0,0	220,9	144,3	-34,7	0,3	2.470,5	2.577,2	4,3	1.786,4
Total	100,0	1.255.196,1	1.225.707,7	-2,3	100,0	839.630,7	755.029,6	-10,1	61,6

Source : NBB

AFTERWORD

The ongoing period of economic downturn, combined with geopolitical factors that are difficult to predict, are not preventing companies from continuing along the path of innovation, sustainability and circularity.

Top design that is world class

The state-of-the-art products of our furniture companies in Belgium are appreciated worldwide for their creativity, quality and tailor-made service. Under the banner 'Belgian Furniture powered by Fedustria', stands (and shared stands) are organised and set up at a variety of furniture and interior trade fairs, such as Milan, Index Dubai or Maison & Objet.

The fact that Belgian furniture design (both indoor and outdoor) is world-class became clear again recently during the Belgian Economic Mission to the United States. The mission shone a spotlight on Belgian furniture design and a **Memorandum of Understanding (MoU) was signed with the TBS Design Gallery in San Francisco**. The purpose of that strategic partnership is to strengthen the presence and visibility of Belgian design in California and to encourage enduring transatlantic collaboration within the design world.

From 2026 onwards, Fedustria and its member companies will be launching the **Belgian Design Days in California**. This event will invite architects, designers and customers to experience the creativity, skill and innovation of Belgian design at close quarters in the showroom of the TBS Gallery.

In addition to San Francisco, Fedustria is also developing new opportunities in Los Angeles, with support from **Flanders Investment & Trade (FIT)** and the Belgian diplomatic representation. Plans are in the pipeline for a pop-up presentation.

Leaders in sustainability and circularity

Partly in the light of legislative proposals, such as the extended producer responsibility, increasing emphasis is now being placed upon concepts such as eco-design and "design for disassembly", so that materials and raw materials can be re-used and recycled. One sector in particular that is a forerunner in that regard is the mattress sector, which is increasingly bringing circular solutions onto the market. Belgian manufacturers are playing a leading role in that area, often serving as an example to their European counterparts. A variety of new business models are also being developed for the recovery, re-use and leasing of furniture.

At this point, it is now a matter of making consumers more aware of how important these circular and ecologically responsible solutions and products actually are.

If everything goes according to plan, the European Union Deforestation Regulation should come into force on 30 December 2025, having been postponed by a year. Recently, the European Commission submitted a proposal to simplify and adapt that regulation even further in order to reduce the administrative overload. This proposal will not provide the urgently needed clarification all that soon, however, and it remains uncertain whether it will receive the necessary support from politicians.

In search of talent

By carrying out initiatives such as the trend platform [watf.news](https://www.watf.news) (Woodcrafts and Textile Futures) and the STEAM tool [TWIINZ.WORLD](https://www.twiinz.world), which were rolled out in collaboration with the youth marketing agency Trendwolves, Fedustria is aiming to introduce and attract talented young people to the furniture sector. By visiting TWIINZ.WORLD, 10- to 14-year-olds can engage creatively in a virtual world with 3D products from Fedustria member companies, to create their own dream worlds (such as their dream bedroom, dream classroom or dream garden).



Choosing wooden furniture is good for your health!

Neuroscientific research recently carried out under the leadership of Prof. Dr. Steven Laureys has shown that wood has a positive impact on our well-being: it reduces stress, helps to create positive emotions and enhances people's emotional intelligence and engagement. Whether at home, at the office, in schools or in hospitals, wood creates a warm and calming atmosphere. Choosing wooden furniture therefore has a positive effect on our well-being. To find out more about the research, please visit: <https://houtdenatuurlijkekeuze.be/ons-brein-houdt-van-hout/>

An extensive range

Belgium's furniture producers have something for everyone: from flat-pack furniture, compact furniture, oversized combinations and minimalistic, streamlined designs to exuberantly executed products, ranging from the mid-market segment to the high end of the market. The Brussels Furniture Fair provides visitors with a wonderful overview of what Belgium's furniture industry has to offer. It's definitely worth a visit!

Additional information:

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3. BRUSSELS FURNITURE FAIR – NEW DEVELOPMENTS

Looking at the results for the whole year, we have to conclude that the market is still rather unfavorable. However, recent developments do give us reason to look towards the future with positivity.

A positivity which is shared by our exhibitors and which stems primarily from a belief in their own entrepreneurship and the innovations presented here.

When the road is blocked we look for new paths to walk and thus encounter new opportunities. We notice manufacturers and retailers are looking for new markets and try to evolve accordingly.

As organizers of a trade fair, we greatly appreciate and applaud this belief and way of thinking, and are keen to incorporate it into our own philosophy.

As an example, I would like to highlight three segments which are in full development here at our trade fair.

Outdoor Living

The seed has turned into a seedling! The seed that was planted last year for the launch of a high-quality Outdoor Living platform is sprouting and growing to an international level. This year, we are proud to welcome Roolf Living, Wunder, Umbrosa, Tooon by Toon De Somer, Chill Line, Richmond, Soho, Mazu and Gescova. You can find these brands on the Outdoor Living platform in hall 4.

With the creation of this outdoor platform, we have chosen to expand our offering and reach a wider audience. This is a long term project in which we will continue to invest in the coming years.

Contract

Contract is the perfect example of identifying new opportunities and markets. We are noticing that more and more furniture manufacturers are focusing on the hospitality and office sectors in addition to furniture retail. Among other things, these offer a foothold when less is being spent on home furnishings in the private sphere.

For this we have launched a contract network drink offering interior stylists and decision-makers within the hospitality market the opportunity to get in touch with the furniture manufacturers directly. No less than 30 of our exhibitors here have signed up for this event

taking place on Tuesday evening 6PM at the Belgian Design Island in hall 5. Which brings us to the final segment we would like to highlight once more.

Belgian Design Island

Identifying new opportunities means looking forward towards the future. And the future depends on the youth of today. That is why we attach great importance to providing a platform for young people and start-ups.

You can find them here at the main entrance of hall 5 with an extraordinary collection of furniture design.

I would like to invite all of you to explore these new or evolving segments, discover their collections and hear their thoughts.

On that note I would like to conclude this year's press conference of the Brussels Furniture Fair 2025.

I wish you all a very pleasant stay and inspiring visit.