

European Market for Picture & Mirror Frames



In the collection of a general home decoration wholesaler or retailer, frames are classified as 'home accessories'. In this group, decorative vases, objects such as figurines, and sometimes candle holders, stools or wall decoration are also found. They can be used for framing paintings, photographs, mirror or similar objects and come in a great variety of materials ranging from the more industrially-applied materials to semi-industrial or hand-applied materials. Industrially-applied materials are metal (stainless steel, silver, silver-plated, platinum) while semi-industrial or hand-applied materials include wood and sustainable products.

Europe's favorable economic prospects inspire consumers to invest in home decoration. Demand for new, sustainable materials and production methods offer interesting opportunities for developing country suppliers. China is Europe's largest supplier of frames meaning that one will have to offer added value (going niche) in order to compete against Chinese imports, which mainly focus on the low-end market.

Features & Functions

Three main purposes of frames can be distinguished as framing photos, displaying paintings and drawings, and holding mirrors. With the increasing popularity of putting up frames in the home, frames have developed new functions. Depending on these various uses, frames have a spectrum of styles: from almost invisible to more expressive. Generally, frames for artworks are neutral, as the consumer's focus is on the framed painting or drawing rather than on the frame itself. Photo and mirror frames are more relevant for exporters, as the consumer makes a conscious choice for a particular type and style of a frame that is in line with the style of the interior of the home. Such frames are therefore more decorative pieces in their own right. Dimensions of photo frames are linked to the usual formats of photo prints, but mirror frames have enormous flexibility with sizes ranging from miniature to 'statement'. Both types of frames can be found around the house: suspended from the walls of the living room, bedroom (kids and adults), home office or the hallways, or mounted, placed on mantelpieces or side tables.

Material & Design

An almost unlimited choice of materials and techniques is available to frames: from any type of metal (silver, pewter, brass etc.), wood, plastics and other such artificial materials, bamboo, even textile, recycled paper etc. In the lower and upper sections of the market, industrialized processes ensure



affordability (low end) or sleek, minimal looks (high end), whilst the middle of the market offers much that is handmade or semi-industrial.

For design, craft statements can be made by handmade techniques such as wood marquetry, enamelling, or by means of decoration with precious stones or by gilding. Recycled wood is an often-found material in the market for frames, not necessarily from the point of view of sustainability, but because the distressed look of reclaimed wood fits well into the prominent nostalgic style in the middle of the market. Frames in metal often find their place in more classical mid and premium segments, whilst the lower-end segment will use hardboards, poly-resin, MDF, plastics, composites, and other inexpensive materials. Shapes, especially in mirrors, are extremely flexible, from square, rectangular to round, oval and any fancy abstract or figurative shapes. Shape, size, material and techniques, and decoration are the ingredients that create a style and as such need to match to be convincing. In the European market, frames generally follow the normal segmentation of home decoration, but vary somewhat in having a very broad lower and middle segment, and quite a small top segment. Overall, frames are affordable and accessible. Mirrors can go luxury, but are then often masterpieces in glass or crystal, without frames.

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Quality - Functional and Artistic

As with any product, frames need to be well-made, fitting their price. This relates to the corner joints, and how well the backings fit. Durability is a less central value with frames, as they are usually not handled much and, as a typical mid-market product, subject to trends in color and style and as such will have a relatively fast turnaround. Larger, mounted frames are more central to the overall look of the home and as such will not be replaced often.

Functional quality is related to the suitability of frames for the standard dimensions of photo prints, which can vary from the popular 'postcard' size (10x15 cm) to anything larger. It is good service to provide a mat (or 'passe partout' as it is called in Europe) that helps to place the print correctly. Frames can come with or without extra covering in the form of glass or other transparent materials. Photo frames with options at the back for mounting or suspending the frame offer extra convenience. Frames that can be used both in portrait or landscape should have rear stands accommodating both modes.

Artistic quality comes with such features as wooden frames with mortise and tenon or other joints signaling traditional craftsmanship, skilled metalwork, or attractive

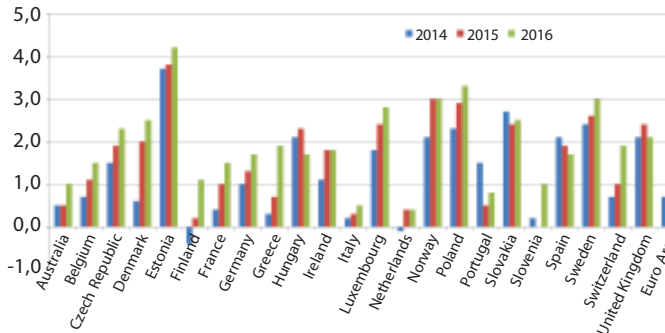
decoration. Generally, though, in Europe frames belong to the middle of the market and as such are accessible in style and price, rather than top design. This is because they need to blend with the atmosphere (e.g. romantic, classic or nostalgic) rather than stand out as an individual craft piece.

Labelling, Packing & Packaging

The label on the outer box should include information concerning the product such as the producer, consignee, material used, quantity, size, volume, and caution signs. Information on the carton should correspond to the packing list sent to the importer. Appropriate labelling and marking can protect products from being damaged by indicating, for instance, that the item is fragile or that it needs to be kept upright. It is important to label individual parcels and packages as well, but always based on the buyer's instructions. Within Europe, EAN/Barcodes are widely used on the product label. One should ensure that the instructions of the importer are followed when it comes to placing the barcode stickers.

Generally, it makes sense to do so at the back of the frames, out of sight of the consumer. The buyer will specify what information they need on product labels or on the item itself (logos, 'made in...'). This forms part of the order specifications. English language for labelling of the outer packing should be used to facilitate transportation handling. The language of the destination market should be used for the consumer packaging. That is, unless the buyer has indicated otherwise. Frames should be packed in agreement with the importer's instructions. Every importer has their own specific requirements related to the use of packing materials, the filling of cartons, palletisation, and the stowing of containers. One should always ask for the importer's order specifications, which are part of the purchase order. The balance is between using maximum protection and avoiding excess materials (waste removal is a cost to buyers) or shipping 'air'.

Real private consumption expenditure, 2014-2016, %change from previous year



Proper packing of frames can minimize the risk of damage through shocks, extreme temperatures, humidity, and vibration. The fragility of the frames determines the packing of the products for export. Packing should prevent that individual items inside a carton damage each other and that the cartons themselves damage each other when they are stacked inside the container. Packaging therefore usually consists of inner and outer cardboard boxes, with appropriate materials to protect the products inside the inner boxes (this may involve materials such as bubble wrap or paper, depending on the preferences of the buyer). Packing needs to be of easy-to-handle dimensions and weight. Standards here are often related to labor regulations at point of destination and will have to be specified by the buyer. Cartons are usually palletized for air or sea transport and exporters are requested to maximize pallet space. In the case of frames, they are generally conveniently flat and as such will pack efficiently, although special care must be taken of the glass panes and any accessories such as beadwork or floral decorations that may be vulnerable.

In the case of wooden frames, special care should be taken to properly dry the wood after production to prevent the wood from moulding or cracking. Mould can appear during transport due to condensation inside the container, caused by the humid air from the place of origin getting colder and warmer due to day-to-night fluctuations in temperature. Proper air ventilation inside the container is vital to prevent this and containers must be inspected for air holes before shipment, and anti-moisture products are available to place amongst the cargo. Make sure the importer's instructions are followed here.

Although frames have a high gift and seasonal character, the exporter is usually not requested to provide consumer packaging as that is usually provided by the retailer at the point of sale in the form of corporate packaging or gift wrapping. For the growing e-tail market, exporters need to pack their items individually, to facilitate logistics to the end consumer.

Demand

After a dip in 2013, European imports of picture and mirror frames are recovering strongly, especially imports from developing countries. As the largest decorative object importers in Europe by far, Germany and the United Kingdom are interesting focus markets for developing country suppliers of picture and mirror frames. Opportunities on these mature markets are predominantly in the lower and middle end. European production of picture and mirror frames fluctuates

somewhat around Euro 550 million. Similarly, consumption fluctuates around Euro 620 million, making Europe's demand for picture and mirror frames higher than its production. With Euro 273 million, Italy is responsible for 50% of European production of picture and mirror frames, followed by France with Euro 63 million. These countries are also Europe's main consumers of picture and mirror frames, with Euro 258 million and Euro 77 million, respectively.

Predictions of GDP and private consumption expenditure are important indicators for the European market for picture and mirror frames. The sector is closely linked to economic conditions. When there is room in their disposable income, consumers increase their spending on luxury products like picture and mirror frames.

Between 2014 and 2016, European GDP and private consumption expenditures are expected to increase. This means that consumption of luxury and decorative products is likely to rise. Especially in emerging markets, an increase in GDP creates room for this type of spending. Due to saturation, growth in consumption will be moderate for mature markets.

Trends that offer opportunities

Framing itself is trendy. As such, frames have become more than functional items, framing pictures of the family or artworks.

Decorative items on walls - Frames have become typical decorative items, taking pride of place on walls and throughout the home. Also, frames have developed new directions.





Stimulated by online and offline home magazines, consumers in the mature European market are increasingly using the main walls, especially in living- and bedrooms, to compose with frames. This links to the longer-term trend where consumers are increasingly confident to personalise their homes to display their style and sense of taste to visitors. Both in mirrors and photo frames, clustering is popular. Consumers randomly group their frames on the wall, or buy ready-made clusters of frames. The frames grouped together can have different shapes and decorations. This is connected with the trend where consumers eclectically mix and match old, new, different materials, sizes, and shapes to be and feel different.

Different consumers with different preferences - Especially mid-market, consumers put much pride in making their own frames or accessorizing them, redecorating old frames with the help of paint, wall paper, beadwork etc. Ideas are provided by Home and Hobby magazines, hobby and DIY programmes, blogs, and design websites. Whereas retailers provide much that is imitation-vintage, consumers (in all segments) are scouting (online and offline) for real vintage frames, either in the form of flea-market finds or exclusive, valuable pieces. These are appreciated for adding a nostalgic atmosphere or for the level of craftsmanship. Again, such second-hand frames are freely mixed with newly bought items.

Teenage girls decorate their rooms in bright colors, often in a romantic style - Frames reflect that choice of color (acids, pinks and purples) and are often accessorized with beads, stickers, and the like. In addition, pocket mirrors are popular with this consumer group. The materials of the frames and accessories are inexpensive as this is a price-sensitive consumer.

Another segment to watch is the baby or infant bedroom - In mature countries, young children's bedrooms are a new source of status and as such will be meticulously

decorated, sometimes even with designer furniture and accessories (in line with the clothing and shoes). Picture frames are an integral aspect of this, and soft pastels are recommended.

Frames are perfect as a gift to friends and relatives for occasions such as weddings, Valentine, Christmas, and births. Often the shapes (e.g. heart) and decorations (e.g. tree and snow) of the frames are adapted to the occasion.

Increasingly, consumers in mature markets are adopting what is termed a 'nomadic' lifestyle - they are travelling more, and may even have flexible work places and relations. Travel gear has exploded because of this, and small, portable frames may help to stay in touch with the near and dear, or to have a quick peek in the mirror.

Sustainability is top of mind in today's consumers - especially in such mature markets as Germany or the United Kingdom. However, in the category of picture or photo frames, there has hardly been any movement towards greener products, beyond the occasional frame in recycled wood or paper. The fair-trade segment, however, has traditionally been strong in this category, but their offer has not always reached mainstream markets. Therefore, it seems there is room for action.

Generally, 'origin' is an important element in home decoration - 'folk' influences a.o. in home textiles, tableware and furniture, especially in the upper ends of the market are observed. Although exporters are invited to add a touch of their own culture in frames (a pattern, technique or material), strong ethnically-inspired products are not much in demand.

As consumers are keen to collect (anything), but are also concerned to keep their homes clutter-free, frames are becoming organizers or display cabinets for precious-loved objects or just the functional basics. The global trend towards increased digitization is not escaping photography either. Hence, the introduction of frames for digital pictures - still in a cheap plastic look, but ready to embrace some design.

Requirements to comply with

Product safety and Liability - The General Product Safety Directive (GPSD), which applies to all consumer products, states that all products marketed in Europe should be safe. The purpose of the legislation is to ensure consumer safety. The Liability Directive states that the European importer is liable for the products put on the European market. However, the importer can in principle pass on a claim to the producer / exporter.

European packaging and packaging waste legislation - This restricts the use of certain heavy metals, among other requirements. The European Union sets requirements for wood packaging materials used for transport (WPM) such as packing cases, boxes, crates, drums, pallets, box pallets and dunnage (wood used to wedge and support non-wood cargo).

Wood preservatives - The European Union has restricted the use of arsenic and creosotes as wood preservatives. Although these preservatives are not very commonly used anymore (especially not in consumer goods), one should make sure that their products do not contain these hazardous substances.

Timber/endangered species regulation - The Convention on International Trade in Endangered Species (CITES) lays down provisions for the international trade of endangered species. The European Union has set additional import restrictions. The FLEGT action plan is designed to control the entry of timber into Europe from those countries that have



entered into Voluntary Partnership Agreements (VPA) with Europe. It makes it illegal to import certain types of timber from these countries unless that timber has a FLEGT license, which evidences that the timber has been legally harvested. Under the EU Timber Regulation (EUTR), placing illegally harvested timber and products on the European market is prohibited. Only when your timber is proven legal, it is allowed to be imported into Europe. Wood carrying a FLEGT license, or a CITES permit, is considered to comply with the EUTR.

Others - Cadmium compounds are carcinogenic agents, which are used in different applications. European legislation restricts the use of cadmium in the following three cases: (1) cadmium used as plastic pigment, (2) cadmium used as stabilizer in plastics, and (3) cadmium used as coating of metallic plates and surfaces.

Additional requirements

Sustainability - Consumers are increasingly aware of the social and environmental circumstances during production. Consequently, requirements regarding sustainability and certification are increasingly important to buyers. Implementing a management system (e.g. ISO 14000 on environmental aspects or SA 8000 on social conditions), or using sustainably produced (FSC) materials may be a competitive advantage.

Codes of conduct - European buyers may expect to comply with their supplier codes of conduct. This can be the importer's own code of conduct or a code of conduct as a part of an initiative in which the importer is participating (e.g. BSCI).

The following are examples of initiatives regarding sustainability, possibly relevant if you want to export to Europe:

- The Business Social Compliance Initiative (BSCI) is developed by European retailers to improve social conditions in sourcing countries. Suppliers of BSCI participants are expected to comply with the BSCI Code of conduct. To prove compliance, your production process can be audited at the request of the importer. Once a company is audited, it will be included in a database that can be used by all BSCI participants.
- ISO 14001 Certification scheme that provides generic requirements for an organization's environmental policy.
- SA 8000 Certification standard by Social Accountability International (SAI) for the improvement of working conditions. ■

Source: Cbi.eu