

# **Scandinavian Design Decor Market Forecasts to 2032 - Global Analysis By Product Type (Furniture, Lighting, Textile Products and Accessories), Material, Distribution Channel, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Scandinavian Design Decor Market is accounted for \$22.15 billion in 2025 and is expected to reach \$40.80 billion by 2032 growing at a CAGR of 9.12% during the forecast period. Scandinavian design decor focuses on creating interiors that are simple, practical, and visually soothing, inspired by Nordic living traditions. The style is characterized by minimal ornamentation, smooth lines, and open spaces that avoid clutter. Soft neutral shades, including white, beige, and light grey, dominate the color scheme to enhance brightness. Natural elements like pale wood, cotton, wool, and stone introduce warmth and tactile comfort. Furniture designs are highly functional, ergonomic, and refined in appearance. Maximizing daylight through open layouts and light window treatments is essential. Together, these elements produce calm, welcoming spaces that balance modern elegance with comfort, practicality, and timeless appeal.

According to IKEA's FY24 Sustainability Report (published January 2025), the company has committed to becoming fully circular by 2030, meaning all products will be designed with renewable, recycled, or reused materials. IKEA reports that 100% of the wood used in its products already comes from more sustainable sources (FSC-certified or recycled), and it continues to expand recycled plastics and textiles.

## **Market Dynamics:**

Driver:

## Rising preference for minimalist and functional interiors

An increasing inclination toward clean, practical interior designs is strongly supporting the growth of the Scandinavian design decor market. Modern consumers prefer interiors that are simple, organized, and easy to maintain, without unnecessary decorative elements. Scandinavian decor meets these expectations through its emphasis on usability, streamlined layouts, and space-saving furniture designs. The trend is particularly strong in urban environments where compact homes require efficient design solutions. Moreover, minimalist interiors are linked to improved focus and emotional balance, enhancing their appeal. As people prioritize comfort and functionality alongside aesthetics, demand for Scandinavian-style decor elements such as modular furniture and subtle furnishings continues to rise steadily.

### Restraint:

#### High cost of authentic scandinavian products

Elevated pricing associated with genuine Scandinavian design decor is a significant challenge for market expansion. The use of high-quality raw materials, ethical sourcing, and refined production techniques increases manufacturing costs, which are passed on to consumers. For many buyers, especially those with limited budgets, these premium prices reduce affordability. Imported products also face additional logistical and taxation costs, making them even more expensive in international markets. Although Scandinavian decor is valued for longevity and classic appeal, the initial financial commitment can deter widespread adoption. Consequently, the market often caters to niche or premium consumers, limiting its reach across broader customer segments.

### Opportunity:

#### Expansion through e-commerce and online customization

The rise of digital retail and online personalization is opening new growth avenues for the Scandinavian design decor market. E-commerce platforms make it easier for consumers to access Nordic-inspired decor products regardless of geographic location. Virtual design tools and interactive product displays help customers visualize how items will fit into their spaces. Moreover, customization features allow buyers to tailor products to suit individual tastes and functional needs. This flexibility improves user experience and boosts purchase intent. As online shopping continues to expand across regions, especially among tech-savvy consumers, digital channels provide a powerful

opportunity for market penetration and revenue growth.

Threat:

Intense competition from low-cost imitations

Rising competition from affordable, imitation decor products presents a major threat to the Scandinavian design decor market. Manufacturers producing low-cost replicas often mimic Nordic design elements while compromising on material quality and craftsmanship. These products appeal to budget-conscious buyers, drawing demand away from authentic Scandinavian offerings. The increasing presence of such items across digital and retail channels intensifies competitive pressure on established brands. Additionally, the difficulty in differentiating genuine designs from copies can confuse consumers and erode brand value. As imitation products continue to expand in availability and acceptance, they pose a persistent risk to market profitability and long-term brand positioning.

### **Covid-19 Impact:**

The outbreak of COVID-19 created both challenges and opportunities for the Scandinavian design decor market. Early in the pandemic, restrictions on movement disrupted production activities, supply chains, and global trade, leading to reduced product availability and lower sales. Many physical stores faced temporary shutdowns, impacting overall revenue. Over time, shifting lifestyles and remote working increased consumer interest in home interiors that promote comfort and simplicity. Scandinavian decor benefited from this trend due to its focus on functionality and soothing aesthetics. Additionally, the rapid adoption of online shopping platforms helped brands maintain customer engagement, contributing to market stabilization and post-pandemic recovery.

The furniture segment is expected to be the largest during the forecast period

The furniture segment is expected to account for the largest market share during the forecast period as it strongly embodies the style's functional and minimalist philosophy. Scandinavian furniture focuses on comfort, usability, and understated elegance, making it a preferred choice for contemporary interiors. Essential pieces like seating, dining furniture, and storage solutions are designed to maximize space while maintaining visual simplicity. The rise of compact urban homes has further boosted demand for versatile and efficient furniture designs. Moreover, the long-lasting quality and classic appearance of Scandinavian furniture appeal to consumers seeking sustainable and

enduring products. As furniture forms the foundation of interior design, this segment continues to command the largest share of the market.

The fabric materials segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the fabric materials segment is predicted to witness the highest growth rate as consumers place greater importance on tactile comfort and visual warmth. Textiles such as linen, cotton, and wool are widely used to enhance the softness and livability of Scandinavian interiors. Demand is rising for fabric-based decor items including upholstery, rugs, blankets, and decorative cushions. Sustainability trends further strengthen this segment, as natural and recyclable fabrics align with eco-conscious preferences. Unlike hard materials, textiles allow frequent style updates and personalization, encouraging repeat purchases. These factors collectively drive higher adoption rates, positioning fabric materials as the segment with the highest growth rate.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share due to its historical connection and strong appreciation for Nordic aesthetics. The design philosophy is well integrated into European lifestyles, where clean lines, practicality, and natural textures are highly valued. The region benefits from a developed interior decor ecosystem, high brand recognition, and easy access to Scandinavian-inspired products. Growing emphasis on sustainability and minimalist interiors among European consumers further drives demand. Moreover, the presence of experienced designers, efficient supply chains, and established distribution channels enhances market stability. Together, these elements enable Europe to maintain the largest share in the global Scandinavian design decor market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by evolving consumer lifestyles and urban development. Rising incomes and improved living standards are encouraging homeowners to adopt contemporary interior styles that emphasize simplicity and functionality. Scandinavian decor aligns well with the needs of densely populated cities, offering efficient space utilization and modern aesthetics. Digital platforms have played a key role in spreading design awareness and enabling easy product access across the region. Moreover, growing demand from residential projects, offices, and hospitality spaces is accelerating

adoption. These factors collectively position Asia-Pacific as the region with the highest growth rate in the market.

### Key players in the market

Some of the key players in Scandinavian Design Decor Market include Nordic Nest, Hem, Menu, Normann Copenhagen, Andersen Furniture, Gubi, Carl Hansen & Søn, Broste Copenhagen, Ib Laursen, Fritz Hansen, Hay, Louis Poulsen, Muuto, Ferm Living and House Doctor.

### Key Developments:

In December 2025, Fritz Hansen has unveiled Solae, a new portable lamp designed by the renowned Cecilie Manz. Blending functional versatility with sculptural beauty, the lamp delivers both powerful illumination and atmospheric warmth, moving seamlessly from workspace to leisure setting, indoors or outdoors.

In October 2022, Carl Hansen & Søn has opened a new 350 sq m flagship store in the Östermalm area of Stockholm, which is becoming a hub for high-end design companies. The space, a former bank, has been completely transformed by Vasco Trigueiros from design duo Trigueiros Architecture. Concrete columns have a new, spiky terracotta finish. A flat wall has been given a wavy structure.

### Product Types Covered:

Furniture

Lighting

Textile Products

Accessories

### Materials Covered:

Wood

Metal

Glass

Fabric Materials

Distribution Channels Covered:

Online Platforms

Specialty Stores

Large Retailers

End Users Covered:

Residential

Commercial

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

**Company Profiling**

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

**Regional Segmentation**

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

**Competitive Benchmarking**

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances



## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL SCANDINAVIAN DESIGN DECOR MARKET, BY PRODUCT TYPE**

- 5.1 Introduction
- 5.2 Furniture
- 5.3 Lighting
- 5.4 Textile Products
- 5.5 Accessories

## **6 GLOBAL SCANDINAVIAN DESIGN DECOR MARKET, BY MATERIAL**

- 6.1 Introduction
- 6.2 Wood
- 6.3 Metal
- 6.4 Glass
- 6.5 Fabric Materials

## **7 GLOBAL SCANDINAVIAN DESIGN DECOR MARKET, BY DISTRIBUTION CHANNEL**

- 7.1 Introduction
- 7.2 Online Platforms
- 7.3 Specialty Stores
- 7.4 Large Retailers

## **8 GLOBAL SCANDINAVIAN DESIGN DECOR MARKET, BY END USER**

- 8.1 Introduction
- 8.2 Residential
- 8.3 Commercial

## **9 GLOBAL SCANDINAVIAN DESIGN DECOR MARKET, BY GEOGRAPHY**

- 9.1 Introduction
- 9.2 North America
  - 9.2.1 US
  - 9.2.2 Canada
  - 9.2.3 Mexico
- 9.3 Europe
  - 9.3.1 Germany

- 9.3.2 UK
- 9.3.3 Italy
- 9.3.4 France
- 9.3.5 Spain
- 9.3.6 Rest of Europe
- 9.4 Asia Pacific
  - 9.4.1 Japan
  - 9.4.2 China
  - 9.4.3 India
  - 9.4.4 Australia
  - 9.4.5 New Zealand
  - 9.4.6 South Korea
  - 9.4.7 Rest of Asia Pacific
- 9.5 South America
  - 9.5.1 Argentina
  - 9.5.2 Brazil
  - 9.5.3 Chile
  - 9.5.4 Rest of South America
- 9.6 Middle East & Africa
  - 9.6.1 Saudi Arabia
  - 9.6.2 UAE
  - 9.6.3 Qatar
  - 9.6.4 South Africa
  - 9.6.5 Rest of Middle East & Africa

## **10 KEY DEVELOPMENTS**

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

## **11 COMPANY PROFILING**

- 11.1 Nordic Nest
- 11.2 Hem
- 11.3 Menu
- 11.4 Normann Copenhagen

- 11.5 Andersen Furniture
- 11.6 Gubi
- 11.7 Carl Hansen & Søn
- 11.8 Broste Copenhagen
- 11.9 Ib Laursen
- 11.10 Fritz Hansen
- 11.11 Hay
- 11.12 Louis Poulsen
- 11.13 Muuto
- 11.14 Ferm Living
- 11.15 House Doctor

## List Of Tables

### LIST OF TABLES

Table 1 Global Scandinavian Design Decor Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Scandinavian Design Decor Market Outlook, By Product Type (2024-2032) (\$MN)

Table 3 Global Scandinavian Design Decor Market Outlook, By Furniture (2024-2032) (\$MN)

Table 4 Global Scandinavian Design Decor Market Outlook, By Lighting (2024-2032) (\$MN)

Table 5 Global Scandinavian Design Decor Market Outlook, By Textile Products (2024-2032) (\$MN)

Table 6 Global Scandinavian Design Decor Market Outlook, By Accessories (2024-2032) (\$MN)

Table 7 Global Scandinavian Design Decor Market Outlook, By Material (2024-2032) (\$MN)

Table 8 Global Scandinavian Design Decor Market Outlook, By Wood (2024-2032) (\$MN)

Table 9 Global Scandinavian Design Decor Market Outlook, By Metal (2024-2032) (\$MN)

Table 10 Global Scandinavian Design Decor Market Outlook, By Glass (2024-2032) (\$MN)

Table 11 Global Scandinavian Design Decor Market Outlook, By Fabric Materials (2024-2032) (\$MN)

Table 12 Global Scandinavian Design Decor Market Outlook, By Distribution Channel (2024-2032) (\$MN)

Table 13 Global Scandinavian Design Decor Market Outlook, By Online Platforms (2024-2032) (\$MN)

Table 14 Global Scandinavian Design Decor Market Outlook, By Specialty Stores (2024-2032) (\$MN)

Table 15 Global Scandinavian Design Decor Market Outlook, By Large Retailers (2024-2032) (\$MN)

Table 16 Global Scandinavian Design Decor Market Outlook, By End User (2024-2032) (\$MN)

Table 17 Global Scandinavian Design Decor Market Outlook, By Residential (2024-2032) (\$MN)

Table 18 Global Scandinavian Design Decor Market Outlook, By Commercial

(2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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