

Trend Report: Outdoor Living and Garden Furniture

Trends Autumn 2025

1. Looking back on 2024/2025 – Context & Developments

European consumers were under economic pressure last year. High energy prices, inflation and geopolitical uncertainty dampened consumer confidence[1][2]. More than half (54%) of Europeans were pessimistic about the economy[3]. This manifested itself in a sharper focus on **value**: consumers searched en masse for bargains and paid closer attention to value for money[4][5]. Major international studies show that 'value for money' is the most important purchasing factor (cited by ~59% of consumers)[6]. At the same time, it was not just a matter of cutting back; younger generations in particular appear to be price-sensitive, but parents continue to invest in quality[3]. Sustainability and longevity are valued more highly than just a low price[7]. This fits in with the Euromonitor trend of "Added Value", whereby buyers weigh their purchases more consciously against current and future needs.

Consumer behaviour & preferences. In 2024, consumers increasingly sought products that promote well-being and convenience. Health and wellness were central; people strive for a healthier lifestyle in the long term ("longevity journey"). In addition, there was a clear **sustainability reflex**: people were keen to choose eco-friendly options, but only if they offered demonstrable quality and benefits. As Euromonitor notes, consumers pay attention to both the environmental impact *and* the primary benefits of products – green claims must be substantiated. The need for simplicity and tranquillity also grew: in a world full of stimuli, people want to use their (outdoor) space to digitally detox and find themselves, free from screens and notifications. This desire for simplicity and nature is reflected in garden trends.

Sales growth in the garden segment. Despite economic concerns, interest in home and garden remained surprisingly resilient. Pragma's own Annual Business Review 2025 shows strong growth in outdoor categories. In 2024/25, interest in pool furniture, garden items and children's furniture increased significantly. Products related to water and gardening were particularly popular. This growth is partly driven by changing consumer behaviour: more than ever, the garden became an extension of the home, a place for children to play and for families to relax together. Dominant product types last year included spacious lounge sets, comfortable sun loungers and swimming pool accessories, as well as garden items such as **planters** and mini greenhouses. It is striking that *planters* were even the fastest-growing product group within the range, indicating a trend towards small-scale gardening on balconies and terraces.

Economic context. Despite growth in demand in certain segments, the sector faced headwinds. Pragma reported a decline in total shipments (July '24 – June '25 vs. a year earlier), partly due to more cautious purchasing and macroeconomic shifts in key European markets[8]. Tariff uncertainty (e.g. around EU–VS import duties) and local competition put pressure on trade[9]. Nevertheless, there were some bright spots: 2024 saw a resurgence in home improvement,

seasonal products and newly launched items, especially in outdoor toys and swimming pool-related items[10]. On balance, consumers proved cautious but not entirely averse: they spent less on pure luxury and more on affordable quality products for the home and garden. Home improvement remained relatively **resilient**, with investment in the garden as a place to stay at home continuing. This forms the basis for the trends we expect to see continuing in the autumn of 2025.

2. Coming season (autumn 2025 – spring 2026): Outlook & Themes

For the coming season, **well-being, flexibility and the blurring of the boundary between indoors and outdoors** are seen as leading themes. Consumers increasingly view their outdoor space as an essential part of their living environment – a place for relaxation, health and socialising. Outdoor living has gone from "luxury to necessity" in today's hectic world. Patio and garden design focuses on a deeper connection with nature and personal comfort. The emphasis is on creating an outdoor oasis – a **sanctuary** – that brings indoor living outside and where one can unwind.

Wellness & outdoor living. In line with the wellness trend, consumers are seeking peace and relaxation in the garden. It is expected that in autumn 2025 and spring 2026, gardens and balconies will serve even more emphatically as an extension of the living room for mindful relaxation. Think of outdoor yoga corners, jacuzzis or cold plunge pools for home wellness, and seating areas to enjoy a book offline. There is a great need for **screen-free** time in the open air, as a counterbalance to our screen-saturated lives. This ties in with the search for simplicity and security: 'less stimulation, more nature' is an unspoken motto. Health also plays a role: being outdoors means fresh air, vitamin D and stress reduction, which consumers actively pursue in their lifestyle.

Indoor-outdoor overlap. One of the most striking developments is the further intertwining of indoor and outdoor spaces. Home trends and garden trends are merging. In the coming season, we will see **outdoor furniture that is just as stylish and comfortable as indoor furniture**. Manufacturers are presenting lounge sets and chairs that, in terms of design, upholstery and finish, look like they could have come straight from the living room[13]. "The boundary between indoors and outdoors is becoming increasingly blurred; many pieces of outdoor furniture would not look out of place indoors, and that is exactly the intention," confirms trend expert Challie Stillman[14]. People want to decorate their patio or veranda with the same care as their living room, so that style and comfort are consistent. As a result, materials such as high-quality textiles, cushions with rich patterns and even indoor-looking rugs are now being used outdoors – albeit in weather-resistant versions. Canopies, verandas with sliding glass doors and garden rooms also make it possible to enjoy the garden in autumn and early spring, extending the **outdoor season**. The credo for 2025/26: create an open-air living room so you can relax in your own green environment all year round[15].

Flexible layouts. In line with changing lifestyles – from working from home to entertaining at home more often – the emphasis for the coming season is on **flexibility** in garden layout. Consumers expect furniture that can be easily adapted to different uses. **Modular lounge sets** and smart

layouts are on the rise (see Section 6). An additional advantage is that modular or easily movable elements allow you to rearrange the garden for a cosy drinks party, for example, and then create a zen breakfast spot at the same table the next day. This flexibility is especially important now that spaces – certainly in the city – are more compact. Every element in the garden must be multifunctional, a trend that we will discuss in more detail below.

Materials and atmosphere (see Sections 3, 4 and 5) also respond to these themes, of course. The colour palettes for the new season exude tranquillity (earth tones) with the occasional cheerful accent for personality. Materials are chosen for their durability, making the outdoor environment feel homely but able to withstand wind and weather. All in all, autumn 2025 to spring 2026 promises to be a period in which the garden manifests itself as **a wellness retreat, living room and playground** all in one – with consumers more conscious than ever of choosing quality of life in their own homes and gardens.

3. Materials: Sustainable, Innovative & Weatherproof

The choice of materials in outdoor furniture is evolving towards **sustainability and high performance**. Classic materials such as teak wood and aluminium remain favourites, but are often combined with new techniques and eco-innovations. According to market research, the industry is investing heavily in **eco-friendly materials and composites** that last longer[16]. This is driven both by consumer preferences (after all, people want value and longevity) and by technological advances.

Wood – teak & co. Teak has traditionally been the premium material for garden furniture, and this will remain the case in 2025/26. Teak (and similar tropical hardwoods such as iroko or eucalyptus) offers natural weather resistance – the oil in teak makes the wood naturally water-repellent and resistant to rot[17]. What's more, teak's warm colour and grain give it a timeless, luxurious look. However, sustainability is an important factor: responsible forest management and certification (FSC) are important, and *alternatives* are increasingly being considered. Bamboo, for example, is emerging as a fast-growing renewable raw material for furniture. It is strong, light and grows back much faster than hardwood. **European wood** (e.g. thermally treated ash or acacia) is also used to reduce transport distances.

Metals – aluminium & steel. Aluminium has firmly established itself as the preferred metal for garden furniture. It is lightweight, rustproof and requires little maintenance – ideal for outdoor use. In 2025, we will also see interesting **innovations such as 'wood-look aluminium'**: aluminium profiles with a coating or print that looks like wood, giving the warm appearance of wood with the practical advantages of metal. This type of innovation – classic look, modern performance – appeals to consumers who want low maintenance but do not want to compromise on style[19]. Steel (often powder-coated) is mainly used for frames and details, or in the form of *wrought iron* for a vintage look (see Section 5). New powder-coating techniques ensure that metal frames do not discolour or flake; matt coatings (see Section 4) are popular for creating a sleek, modern look.

Wickerwork – rope & wicker. An important trend in materials is the return of wickerwork, but in a modern interpretation. Rope materials – braided polyester or polypropylene ropes – adorn many design sets. They offer a contemporary interpretation of rattan or cane, with high weather resistance. At the Salone del Mobile in Milan, details in cord and woven fibres were 'almost ubiquitous' in new outdoor collections. Think of backrests made of tightly stretched rope or seats with woven patterns. Rope adds texture and a craftsmanship touch, while being UV and water resistant. **Wicker** is also still around: traditional rattan is often replaced outdoors by synthetic wicker (plastic fibres) that does not split and is resistant to rain. This material is often seen at major trade fairs such as IVEX in Jakarta. Rope and wicker remain very popular in design pieces. They retain the cosy, artisanal charm of rattan furniture, but with significantly less maintenance and greater durability.

Composites & recycled materials. Innovation is also evident in new materials: for example, **plastic composites** that mimic wood, or recycled plastics. **Recycled plastic** is a major up-and-comer – old plastic bottles or textiles are turned into planks and fibres that serve as furniture material. This keeps waste out of landfill and produces sustainable furniture that can withstand wind and weather[21]. Manufacturers also incorporate recycled metal into frames and use outdoor fabrics made from recycled polyester. Such materials are generally colourfast, UV-resistant and last for years, supporting the *circular economy* while delivering quality[21]. A good example is the use of *composite wood*: ground plastic and wood fibres compressed into planks that look like wood but will never rot or warp – ideal for table tops or decking.

Performance: durability & maintenance. Consumers expect garden furniture to last a long time in all weather conditions. The trend towards '**Sustainable Luxury**' means that people prefer to invest in well-made pieces that will last for years rather than replacing something cheap every year[22]. Sustainable materials such as those mentioned above play a role in this. Manufacturers also advertise high performance: *weather-resistant* cushion foam that rains through and dries again, *UV-resistant* fabrics that do not fade in the sun, and coatings that are resistant to scratches and temperature fluctuations. Innovative all-weather textiles (e.g. olefin, acrylic such as Sunbrella) retain their colour and structure for several seasons. As one trend report puts it, brands are increasingly opting for **natural finishes and eco-coatings** that are not only less harmful but also ensure that colours remain vibrant and *fade-resistant* for a long time.

Finally, **ease of maintenance** is an important aspect. Materials that require little maintenance – aluminium that does not need to be repainted, teak that remains beautiful in its greyed state without oil, and plastics that only need to be wiped down – are popular with today's consumers who want convenience. In short, material trends balance aesthetics and performance: luxurious, tactile materials that complement the interior, combined with innovations that ensure a longer lifespan and less hassle.

4. Colours & Finishes: Natural Palettes, Matte Finishes

In 2025, **natural colours** will dominate garden furniture trends, complemented by strategic colour accents. On the one hand, we see a continuation of **earth tones** and organic colours, and on the

other, a revival of vibrant colours as accents (also known as 'dopamine décor' because of its intended uplifting effect).

Dominant colours & combinations. The basic colour palette for outdoor furniture is warm and neutral. Think *sand beige, terracotta red, soft brown tones and moss green* – colours that harmonise with the natural backdrop of the garden and sky. These earthy tones create a calm, timeless base and bring out the outdoor feeling. At the Salone fair, for example, a 'natural colour range from beige to green and terracotta' was widely noted. Manufacturers often combine such a neutral base (e.g. a teak tabletop in warm brown or a sand-coloured lounge set) with subtle contrasts. **Colour combinations** that work include beige with olive green, stone grey with terracotta accents, or white with wood colours – always balancing cool and warm tones.

In addition to the neutral base, striking **accent colours** are on the rise. After years of mainly grey and white, we are now seeing more daring colours: **deep blue-green (emerald), navy blue and terracotta orange** have been named as trend colours that will be widely used. They reflect nature and the environment (think of the green of plants, the blue of water, the terracotta of earth) and yet exude character. These deep colours are often combined with lighter neutral shades (such as off-white, light grey) to keep the whole look balanced. For those who want something more playful, **bright accents** are an option: coral, ochre yellow or teal (blue-green) used in decorative cushions, parasols or flower pots, for example[28]. It is important that such bright colours are used sparingly and thoughtfully – a few strategic touches of colour add personality without disturbing the tranquillity.

Trends in matt finishes. When it comes to finishes, one word stands out: *matt*. Matt coatings and finishes are incredibly popular, both for furniture and accessories. A matt finish gives a contemporary, refined look and prevents annoying reflections in the bright summer sun. According to Sherwin-Williams colour experts, consumers are increasingly attracted to matt textures because they create a **calm, luxurious look** and emphasise the natural structure of the material[29]. We see this in wooden surfaces (e.g. teak that has only been treated with a matt sealer to bring out the wood grain) and metal frames (powder-coated in matt anthracite or matt white for a modern tone). Matt finishes also have a practical advantage: they hide small scratches or dirt better than glossy surfaces and are often easier to maintain. What's more, matt shades combine well with other trendy materials: matt coatings are often used together with **mixed materials** – for example, a matt black aluminium base with teak armrests – to achieve a stylish, understated look[30]. This mix of matt textures with natural materials helps to visually connect the outdoor space with the interior, which fits in with the indoor-outdoor trend[30].

Colour resistance & maintenance. An important aspect of using colour outdoors is how well the colours withstand weather influences. Manufacturers respond to this with high-quality paints and thoroughly dyed materials (e.g. mass-coloured plastic or thoroughly coloured outdoor fabrics) so that the colour does not fade quickly. As mentioned earlier, many brands also opt for environmentally friendly *natural* pigments and UV-resistant finishes, so that the colours remain beautiful and do not fade[23]. This is partly a sustainability consideration (no harmful substances), but also functional: no one wants their bright green garden chair to be faded after one summer

season. **Harmonisation with the interior** comes into play here: the idea is that the colours of outdoor furniture should match the interior palette, so that the inside and outside form a whole. So we often see recurring colours – if you have lots of warm neutral tones indoors, your patio furniture will be in complementary earth tones; with a modern, cooler interior, you might see grey tones with blue accents outdoors. The goal is a smooth transition, as if the living room and garden are extensions of each other.

In summary: soft natural tones form the basis for 2025, with matt finishes providing a chic and calm canvas. Accents can be added to taste in rich natural colours or cheerful shades to reflect the personality of the occupant. This balanced colour strategy creates an inviting, cohesive look for the outdoor living space, entirely in line with the *quiet* luxury trend in which understated elegance is paramount.

5. Shapes & Styles: Retro, Organic and Minimalist

The style trends in garden furniture for 2025/2026 are characterised by a combination of **retro influences and contemporary design**. On the one hand, nostalgic designs are making a comeback – think round shapes and vintage materials – while on the other hand, minimalism and sleek design remain popular for a modern look. The result is an eclectic mix that combines *organic shapes, classic charm and contemporary simplicity*.

Organic, soft shapes. Sharp corners give way to curves. Many new designs feature **curved, enveloping lines** and flowing shapes that radiate comfort and approachability. Lounge chairs with curved armrests, oval side tables and sofa elements with rounded corners are everywhere. This organic design language ties in with the natural environment (nothing in nature is completely straight) and gives furniture a friendly, accessible look. In addition, rounder shapes increase seating comfort – one 'nestles' in a bucket seat or on a curved sofa that follows the body's contours. Designers draw inspiration from mid-century modern styles and 1970s design, periods in which organic lines were also dominant. At recent design fairs, for example, we saw sculptural lounge chairs and almost undulating sunbeds that look like art objects, but above all are ergonomic.

Retro influences & nostalgia. Nostalgia plays a remarkable role: **vintage and retro styles** are experiencing a revival in outdoor spaces. This is reflected, for example, in the use of **classic materials** such as rattan and wrought iron – a nod to verandas from the 1950s and 1960s. We are also seeing the return of patterns such as **stripes** and woven motifs reminiscent of retro beach chairs and parasols from a bygone era. There are also designs with a touch of Art Deco or mid-century style: think of 1950s-style lounge chairs with slender metal frames and coloured cushions, or nostalgic metal garden benches. According to Homes & Gardens, *stripes, vintage wrought iron, classic teak and rattan* will be some of the major trends in 2025. These retro elements bring character and story with them. A vintage-looking rattan chair or a set of white metal café chairs with a curly pattern instantly gives the garden charm and a sense of history. Designers describe this as 'storytelling design': furniture that tells a story, for example about craftsmanship or cultural heritage. It is precisely this mix of old and new that makes the outdoor space personal and unique.



An example of retro influences and organic shapes: an outdoor lounge set with curved armrests and cushions in a classic striped print, presented in a luxurious outdoor setting. Such designs combine vintage style elements (such as the striped fabric reminiscent of traditional deckchairs) with modern comfort features. The whole exudes a timeless elegance that feels both nostalgic and contemporary. [13][14]

Minimalist & sleek design. Parallel to the retro trend, **minimalism** remains a strong pillar. Many consumers (especially in urban environments) prefer a **simple, no-nonsense style** for their balcony or terrace. Minimalist outdoor furniture is characterised by *clean lines, understated colours and the omission of frills*. A slender black aluminium frame with a plain grey seat, or a teak table with a purely functional shape – these designs create a serene, modern atmosphere outdoors. The advantage of minimalist furniture is its **timelessness and versatility**: it does not go out of fashion quickly and fits into a variety of settings without dominating. Moreover, minimalism creates visual tranquillity, something many people appreciate in their outdoor space as a counterpoint to their often busy interiors. We see brands offering modular minimalism: basic pieces that stand beautifully on their own but can also be easily expanded or rearranged (more on this in Section 6). Importantly, minimalist does not mean cold – designers ensure comfort (e.g. thick seat cushions even if the shape is sleek) and integrate natural materials (a sleek design in warm wood). This gives the garden a *Zen-like* aesthetic that fits perfectly with the wellness trend.

Material mix & visual atmosphere. A striking feature of 2025 styles is the **combination of materials** within a single design to create a richer look. For example, a lounge chair may have a slim metal base with a woven rope seat and teak armrests – such a mix adds texture and layering to the object. This type of material mix stems from both aesthetic and practical considerations: each material brings its own look and advantage (metal for strength, wood for warmth, textiles for tactility). The visual atmosphere of 2025/2026 is therefore characterised by **layering**: furniture looks interesting from both close up and afar, and harmonises with both the garden and the interior. The colour palette (earth tones with accents) and the shapes (organic/retro vs. sleek) are

further enhanced by this mix of materials. An organically shaped chair with retro wickerwork in a contemporary aluminium frame tells a story of tradition meeting modernity. This versatility of styles offers consumers the opportunity to truly make their outdoor space their own – whether they fall for nostalgic cosiness or modern simplicity, there is a trend to suit their personal preference. And often it is the combination that does the trick: a sleek minimalist sofa with a few retro striped cushions, for example, can be a hit, as it combines the best of both worlds.

6. Modularity & Multifunctional Use

Modern consumers demand **flexibility** – especially when it comes to furnishing smaller gardens, balconies or roof terraces. Modularity and multifunctionality have therefore become key concepts in outdoor living. In 2025, we will see a strong rise in **modular lounge sets**, expandable modules and smart 2-in-1 solutions that evolve with the needs of the user.

Modular lounge sets. Manufacturers are increasingly introducing lounge set systems consisting of multiple elements that can be combined as desired. Such a set consists, for example, of separate seating modules (corner pieces, centre modules without armrests, ottomans) that can be assembled like a jigsaw puzzle. The big advantage is that the layout can be adapted to the available space or the occasion. For a garden party, you can slide the modules apart to create several seating areas; for a lazy Sunday, you can click them together to form one large lounge sofa. **Infinite reconfiguration** is the motto – end users can play with the layout, which fits in with the trend for *personalised, tailor-made experiences*. At Spanish design fairs, it was noticeable that modular sofas are 'paramount' – essential – for contemporary outdoor spaces[35]. One example is the **BOIRA modular sofa** from Musola, which offers components to switch from an intimate corner to a spacious lounge set[36][37]. This type of furniture concept fits in with our flexible lifestyle: just as we use spaces indoors for multiple purposes, we want outdoor furniture to be able to do the same.



Modular lounge set by the sea. The image above shows a modular outdoor bench system consisting of various seating elements and integrated table modules. The set can be moved apart or put together compactly as desired. This illustrates the trend that lounge sets no longer have fixed forms but adapt to the situation – from a sunbed arrangement to a seating area for several people. The materials (wooden platform, water-resistant cushions) and the neutral design ensure that the modules continue to form a coherent whole in various combinations. [36][16]

Expandable modules & accessories. In addition to sofas, we also see modularity in other garden furniture. *Dining sets* come with extendable table tops or with benches that can be connected. Some lounges have **connectable side tables** or armrests that function as table tops, so that with an extra module you can suddenly create a chaise longue with a side table. There are also manufacturers that offer segments to expand an existing set later on – for example, an extra middle module to turn a 3-seater sofa into a 4-seater. This gives consumers the confidence that their investment will 'grow' with them. **Modular corner sets** are very practical for smaller spaces: you can start with two modules as a compact whole and expand later when you move or have more space. Pragma's own figures showed that categories such as planters (plant pots) and other modular garden accessories were the fastest growers, underlining that people want to be able to design their outdoor space dynamically.

Multifunctional products. In addition to being modular, outdoor furniture often has to fulfil **multiple functions**. Especially in compact urban gardens, people want to use every object for more than one purpose. Manufacturers are responding to this with creative designs: *benches with storage space* (think of a garden bench with a seat that folds open to store cushions or toys), *folding tables* that serve as a console against the wall when not in use, or *footstools* that can serve as a footrest, extra seat or side table. Also popular are **2-in-1 pieces of furniture**, such as a deckchair that can be converted into a swing seat with a few adjustments, or a stool that can also function as a cool box. These products cleverly respond to the need to both relax and make practical use of space. New technologies make multifunctionality even more interesting: for example, there are side tables with built-in Bluetooth speakers or lounge cushions with integrated lighting – turning a single object into a true *entertainment hub* (see Section 8 for trade fair insights on this).

Compact living & changing lifestyles. The trend towards modularity and multifunctionality stems in part from the reality that many people live in more compact homes and do not have large gardens. An apartment balcony must be able to serve as a mini-garden, a relaxation corner and storage space. In 2025, the industry sees this as an opportunity rather than a limitation: **designers are embracing small but beautiful**. For example, there are balcony sets that are modular in design: a lounge sofa during the day, which can be converted into a dining table with chairs for two in the evening. Some modular systems are vertically oriented, such as *vertical garden modules* that serve as both plant stands and privacy screens and can be expanded to suit the width of the balcony. These smart solutions enable consumers to create a full outdoor living experience even in just a few square metres. The motto is flexibility: the furniture adapts to you, rather than the other way around.

Interestingly, this trend is also catching on in large gardens, simply because it is fun and convenient. Those who have a lot of space also enjoy, for example, placing a lounge set in the shade in summer and under the canopy in winter – this is easier with separate modules. Moreover, it keeps the garden 'in motion' and allows the layout to change with the seasons or events (parties, barbecues, etc.). All in all, modularity and multifunctionality ensure **maximum enjoyment in minimum space** and give consumers the freedom to reinvent their outdoor space time and time again. This fits in perfectly with the modern lifestyle, in which flexibility, creativity and efficiency are key[16][38].

7. Consumer trends: Wellness, Sustainability & Conscious Enjoyment

Today's consumers approach purchases – including those for the garden – with a new set of values. Several overarching themes dominate consumer behaviour in 2025: **health and wellness, sustainability, value-driven decisions, digital detox** and **simplicity/escaping the hustle and bustle**. These developments are supported by research from Euromonitor, McKinsey and BCG, among others, and are clearly noticeable in the choices people make for their outdoor living expenses.

Health & wellness first. Trends show that consumers are more conscious of their physical and mental well-being than ever before. People are investing in products that contribute to a healthier lifestyle. For the garden, this means items that encourage relaxation and exercise. Think of jacuzzis, saunas, outdoor yoga mats, but also simply comfortable deckchairs where one can practise mindfulness. Euromonitor describes people as being on 'longevity journeys' – changing their behaviour now for a longer, healthier life. The garden as *a healing space* fits in with this: gardening itself is therapy for many (getting your hands in the soil reduces stress), and a green environment promotes mental wellbeing. We are also seeing outdoor products responding to *functional wellness*: for example, lighting that supports the circadian rhythm (warm light in the evening) or furniture that is ergonomically sound. In short, consumers are seeking health in their own homes and gardens, and manufacturers are responding by integrating wellness features.

Sustainability & eco-consciousness. Sustainability has become an integral part of consumer trends. In Europe, a growing proportion of buyers expect their purchases to be ethical and environmentally friendly. An internal analysis (using data from McKinsey and BCG) shows that 50% of young parents consider the sustainability of toys to be important and 54% of Europeans are concerned about the environment[39]. In the gardening sector, this translates into a preference for **sustainable materials** (see Section 3), long-lasting products and products that are locally or fairly produced. However, consumers are also pragmatic: sustainability must go hand in hand with quality and ease of use. In other words, people are willing to pay more for an eco-friendly alternative, provided that product performs as well as or better than the non-sustainable version. This phenomenon is known as *Eco-logical* – environmental awareness with a practical slant. Manufacturers are responding to this by being transparent about the materials used (recycled plastic, FSC wood), production processes (CO₂-neutral, no harmful chemicals) and even *take-back programmes* where old furniture is recycled into new furniture. This focus on sustainability is not just idealistic: it is also a way for consumers to make conscious, future-proof choices – invest now

in quality that lasts longer, so you don't have to replace it as often (good for the planet and your wallet).

Value-driven purchasing behaviour. Economic uncertainty has led to consumers shopping in a highly **value-driven** manner. This does not necessarily mean buying the cheapest, but getting *value for money*. As mentioned earlier, 'good value for money' is the top priority in European countries[6]. In the garden context, this is evident in people's willingness to invest in larger purchases (e.g. a high-quality lounge set) if they are convinced of its durability and timeless style. Low-quality disposable furniture is becoming less attractive – people realise that in the long run, it is more expensive and harmful to the environment (again, the Sustainable Luxury concept: better to buy one good product than several cheap ones).[22]. Consumers compare offers, read reviews and are strategic: they buy larger items in the off-season or during promotions, and bundle purchases when there are bundle discounts[41]. One insight from BCG is that not all consumers *are downgrading*: Gen Z in particular is price-conscious, but older generations continue to value quality and brand trust[3]. This means that brands must position themselves on **sustainability and reliability** as core values. At Pragma, for example, we have noticed that emphasising the weather resistance and warranty of our products resonates well with value-driven buyers – they want reassurance that their investment is the right one.

Screen-free, home entertainment & simplification. An interesting consumer trend is the conscious choice to relax and seek entertainment at home, rather than always going out or being online. We already saw a huge boost in home entertainment during the pandemic, and that effect is here to stay: people have discovered their gardens as a place to socialise with family and friends. Instead of going out, people are creating pleasant outdoor spaces for drinks, barbecues, film evenings (with an outdoor projector) or games afternoons. This phenomenon is linked to the need for **screen-free quality time**. Many parents and young people themselves say they want to be more 'in the moment', away from their phones and laptops. The garden offers that opportunity: you leave your devices inside and focus on the campfire, the paddling pool or simply a good conversation. Trends such as *outdoor kitchens and entertainment zones* (Section 2) stem from this need to enjoy life at home. Euromonitor also mentions *Filtered Focus* – the urge to filter options and stimuli and focus only on what is important. In the context of leisure time, this means making time for family, nature, hobbies in your own garden, and shutting out all unnecessary noise.

A desire for peace and simplicity. Finally, there is a broader social trend: a certain **escape from complexity**. Consumers long for simplicity, authenticity and meaningful experiences. This partly explains the popularity of vegetable gardening, DIY in the garden, or creating a meditative corner outside. The garden serves as a refuge where one can forget the hustle and bustle of everyday life for a while. This *search for simplicity* also has a cultural component: there is a renewed interest in old crafts and traditions (see storytelling design in Section 8), because they offer a counterbalance to the transience of the digital world. Brands that respond to *storytelling* – for example, a garden furniture collection inspired by Japanese Zen design or local craftsmanship – strike a chord with consumers who are looking for more depth in their purchases.

In short, today's consumers are demanding, but in a positive way: they want products that contribute to personal health, are made with respect for people and the environment, are worth every penny and help to make their home and garden a happy retreat. These values form the backdrop against which all garden furniture trends should be viewed. The wellness hype explains the comfortable, lounge-oriented designs; sustainability drives material innovation; and value drivers stimulate quality over quantity. For Pragma – as a trend observer and supplier – it is essential to embrace these consumer trends and translate them into the range and advice offered to customers.

8. Inspiration from international design fairs

The trends we discuss did not arise in a vacuum – they are visible and reinforced at leading **design fairs** worldwide. In 2025, the following events in particular provided inspiration: **IFEX Jakarta**, **Maison & Objet** (Paris) and **Salone del Mobile** (Milan). As trend analysts at Pragma, we were there, and below we share some highlights, including insights from colleagues Alfons Woudstra (Director of Pragma) and Lars aan de Stegge (Sales Manager) on what they saw changing in the market.

IFEX Jakarta 2025 – craftsmanship and natural materials. At the Indonesia International Furniture Expo (March 2025), the emphasis was traditionally on exotic outdoor design and high-quality natural materials. IFEX is known for its beautiful collections in teak, rattan and other tropical woods, often made by local craftsmen. *Lars aan de Stegge* notes: *"In Jakarta, we saw a strong presence of sustainable materials and culturally- craftsmanship. I was struck by how traditional weaving techniques – such as beautifully hand-woven rattan – are now being combined with modern forms. This gives furniture an authentic character and a contemporary look."* Indeed, a striking trend at IFEX was **storytelling design**: each piece has a story, rooted in Indonesian heritage or nature. For example, there were lounge sets made from recycled teak boat wood – each piece of wood bore traces of its previous life, giving the set a unique story. **Material combinations** also stood out: teak frames with *stainless steel* or aluminium accents, combining classic looks with modern sturdiness (one exhibitor displayed a garden set with "timeless teak and stainless steel designs" that attracted a lot of interest). In terms of colour, we saw warm wood tones combined with earthy upholstery in Jakarta; the overall vibe was one of natural **elegance**. This fair confirmed that sustainability does not have to come at the expense of luxury – high-end finishes and eco-materials go hand in hand. The audience (buyers from around the world) was particularly interested in the mix of **culture and design**: pieces that incorporated a local pattern or story, for example, setting them apart in the Western market.

Maison & Objet 2025 – interior meets exterior. Although the major design fair in Paris (held twice a year) focuses on interiors, the line between indoors and outdoors is thin. Many outdoor trends are presented here in an interior context and vice versa. *Alfons Woudstra* noticed something important during Maison & Objet: *"I was struck by how outdoor collections strive for the same refinement and comfort as indoor pieces. At Maison & Objet, you could see that refined textiles, subtle colour palettes and even indoor-looking finishes are now also being used for outdoor furniture. The message was clear: outdoor furniture can be just as chic and detailed as interior"*

design." This observation ties in with the indoor-outdoor overlap trend. In Paris, for example, luxury brands showcased outdoor sofas upholstered in high-quality fabrics in fashionable colours, complete with decorative cushions and side tables – an arrangement as if it were a living room, but all materials were all-weather. **Colour use** at Maison & Objet for outdoor: lots of natural shades (white, cream, grey-green) combined with deep accents such as midnight blue or burgundy, which is slightly bolder than in previous years. **Cultural influences** were subtle but present: you could see Eastern influences in low lounges and patterns, or a Mediterranean atmosphere in ceramic side tables and terracotta lanterns intended for patios. Another clear trend at M&O was **storytelling through styling**: stands presented outdoor furniture in a setting with plants, textiles and art objects to create a sense of experience (e.g. a Moroccan riad atmosphere or a Scandinavian wellness deck). This inspires consumers to decorate their outdoor space thematically or atmospherically, something that Pragma can also emphasise in its content marketing (e.g. 'Create your own Boho garden corner' with products X and Y).

Salone del Mobile Milano 2025 – innovation and luxury in outdoor design. The Milan fair (April 2025) is the world's most important furniture fair, and outdoor furniture also featured prominently here. **Spanish and Italian brands** set the tone with designs that take outdoor living to the next level, as evidenced by a special outdoor pavilion[43]. The common thread in Milan: **sustainability meets sophistication**[44]. Collections were on display that were ultra-modern and modular, while being produced in a completely sustainable manner. We saw *cutting-edge* materials such as ceramic table tops that resemble wood, 3D-printed chairs made from recycled plastic, and hybrid fabrics that are as soft as cotton but weather-resistant. Alfons Woudstra, also present in Milan, said: *"Salone showcased the vision of the future of outdoor spaces – modular, sustainable and yet luxurious. What struck me most was that every piece exuded craftsmanship; there was soul in the designs. That combination of timeless craftsmanship (such as intricate rope weaving) with new technology (for example, frames that are surprisingly light and strong) showed where our market is heading."*

Trends such as **storytelling design** were also evident here: Expormim, for example, presented a lounge collection featuring traditional weaving techniques with a modern twist – a story of Spanish heritage and innovation. **Material combinations** were everywhere: aluminium and rope, teak and high-tech fibres, concrete-look composite with wooden inserts. Lars aan de Stegge noticed that the stands of top brands at Salone placed their furniture in context: *"You saw complete outdoor rooms with lighting, textiles, and accessories – everything harmonised. The integration of technology in particular (think of built-in solar lighting or smart speakers hidden in design objects) showed that functionality and design are no longer separate worlds."* At Kettal and Vondom, for example, we saw tables with built-in wireless chargers, or LED-lit planters that provide atmospheric lighting in the evening[47].

In terms of **colour and form**, Milan confirmed much of what we saw elsewhere: organic shapes and a natural palette predominated, with striking style themes including **sculptural furniture** (furniture as art objects, with rounded sculptural forms – GamFratesi's designs for Dedon, for example) and **blurring boundaries** (as before: indoors/outdoors visually merge, Federica Biasi's

designs for Emu and Gervasoni were textbook examples of this, combining indoor finesse and outdoor robustness in one)[13][48].

In summary, these international trade fairs have confirmed and enriched the trend patterns from the previous sections. They show that designers and brands *worldwide* are focusing on sustainability, modularity, craftsmanship (heritage) and bridging the gap between indoors and outdoors. For Pragma, this means that we remain focused on these developments and translate them into our collection and advice. Hearing the direct impressions of Alfons and Lars – from the strategic and commercial perspectives, respectively – underlines that trend watching is not something distant and abstract, but has a direct influence on how we shape our market approach.

9. Conclusion: Common Thread & Pragma's Vision for the Future

There is one clear common thread running through all the trends: **the garden is seen as an extension of conscious, quality-oriented indoor living**. Consumers seek the same values and comfort in their outdoor environment as they do indoors, with an additional emphasis on nature and well-being. The trends for autumn 2025 (and looking ahead to 2026) revolve around creating a personal oasis that is sustainable, flexible and stylish.

A key message is '**quality over quantity**' – invest in well-designed, durable furniture that will last for years and serve multiple purposes. This is not only economically sensible, but also more sustainable and satisfying. As one designer aptly put it: "People tend to go for really well-made outdoor pieces that last a long time... they realise that this is ultimately the environmentally conscious thing to do"[49]. Pragma fully endorses this vision. In our collection and development strategy, we choose materials and designs that are timeless and withstand wear and tear, so that customers can make conscious choices that they will enjoy for a long time.

Relevance for the consumer. What do these trends mean for you as a consumer? Firstly, your garden or balcony has enormous potential: it can promote your well-being, provide a place for precious moments with loved ones, and lighten your busy life with a touch of nature. The trends show how you can achieve this: by choosing furniture that supports your *lifestyle* (modular and multifunctional if you are practical; or extra luxurious lounge if you are looking for ultimate relaxation), by choosing colours and materials that make *you* feel good (earth tones for tranquillity, or that one bright accent that makes you happy), and by considering sustainability (products that are fairly made and long-lasting, so you can enjoy them with a clear conscience). With the emergence of so many wonderful options – from modular sofas to solar lighting and eco-materials – consumers can now truly design their gardens as an extension of their identity and values.

Pragma's vision on design and the future. At Pragma Trading, we embrace the developments outlined in design, sustainability and lifestyle. Our design philosophy for the coming years is built on three pillars: **sustainability, flexibility and style**. For us, sustainability means more than just environmental friendliness; it's also about *the longevity of the design*: timeless aesthetics that won't go out of style after one season. Flexibility refers to modular thinking – we want to offer products that grow and change with the user.

Finally, style is what gives a product emotional value – we strive for thoughtful designs with character, whether that's through a retro detail or hyper-modern minimalism. We believe that by combining these pillars, we can offer furniture and outdoor concepts that truly connect with how people want to live in 2025 and beyond.

A clear example is how we respond to the indoor-outdoor trend: we ensure that our outdoor furniture feels just as comfortable as indoor furniture, with thick cushions and beautiful fabrics, but weatherproof. At the same time, we advise customers to coordinate their outdoor and indoor styles for harmony. We also integrate wellness – a Pragma lounge set is not just a set of chairs, but part of an *experience*: we help you think about the layout (a corner for yoga? space for a play area?), we offer accessories such as outdoor rugs and mood lighting to create the right ambiance, and so on.

Making conscious choices. Ultimately, we want consumers to be able to make **more conscious choices** with the knowledge of these trends. That means: inform yourself (e.g. via this white paper) about the possibilities and developments, determine what is important to you (sustainability, comfort, multifunctionality, aesthetics...), and put together your ideal outdoor space based on that. Be guided by what you really need and what makes you happy, rather than by fleeting hypes. After all, the common thread running through all trends is that the garden should be a personal, meaningful place. This is different for everyone: some find meaning in an eco-friendly garden full of recycled materials, others in a design statement that is a talking point, and still others in a no-nonsense, quiet green corner. There is no right or wrong, as long as it is done *consciously and with quality*.

As the Pragma Trading team, we look forward to the coming years with optimism. The focus on sustainability and well-being aligns with our core values, and technological and design innovations make it an incredibly dynamic industry. We see it as our mission to translate these trends into concrete products and inspiration for our customers – so that every consumer can create their ideal outdoor living space, one that stands the test of time and contributes to a happy, healthy life. With an eye for design, respect for the planet and attention to individual needs, we are moving together towards a future in which outdoor living is truly part of *the good life*.

Sources:

- Pragma Trading – Annual Business Review 2025 (internal trend analysis and sales data)[50]
 - Euromonitor (2025) – Consumer Trends Europe
 - Boston Consulting Group (2025) – European Consumers in Uncertainty[1][4]
 - McKinsey (2025) – European Consumer Sentiment Update[50][7]
 - Mordor Intelligence – Outdoor Furniture Market 2025-2030[16][47]
 - Mueble de España – Outdoor Furniture Trend Report 2025[36][51]
 - Salone del Mobile Milano – Trade fair report on outdoor innovations 2025[13][48]
 - Hauser's Patio – Trends in Outdoor Furniture 2025[26][23]
 - Homes & Gardens – Outdoor Furniture Trends 2025[14]
-

[1] [2] [4] [5] [6] [39] European Consumers Brace for More Uncertainty | BCG <https://www.bcg.com/publications/2025/europeans-brace-for-more-uncertainty>

[3] [7] [8] [9] [10] [11] [12] [15] [22] [41] [49] [50] Pragma 2025 Annual Business Review (2).pdf file://file_0000000091ec61f5a42f9e85f3e5847e

[13] [20] [25] [32] [48] Outside and inside the home. The outdoor novelties seen at the Salone del Mobile 2025 | Salone del Mobile <https://www.salonemilano.it/en/articles/outdoor-furniture-design-news-2025>

[14] [34] Outdoor furniture trends designers say are going to be big in 2025 | Homes and Gardens <https://www.homesandgardens.com/interior-design/outdoor-furniture-trends> [16]

[47] Outdoor Furniture Market Size, Trends, Share & Growth Drivers, 2030 <https://www.mordorintelligence.com/industry-reports/global-outdoor-furniture-market>

[17] [18] [21] [23] [26] [27] [28] [38] [40] Remarkable Trends in Outdoor Furniture for 2025 - Luxury Outdoor Living by Hauser's Patio [https://hauserspatio.com/blog/remarkable-trends-in-outdoor-furniture-for-](https://hauserspatio.com/blog/remarkable-trends-in-outdoor-furniture-for-2025/?srsId=AfmBOooeLUbpLpnrKmZppwwkUGIKe0SQZbIZdHrWfHzuTzW4AaBUVOIZ)

[2025/?srsId=AfmBOooeLUbpLpnrKmZppwwkUGIKe0SQZbIZdHrWfHzuTzW4AaBUVOIZ](https://hauserspatio.com/blog/remarkable-trends-in-outdoor-furniture-for-2025/?srsId=AfmBOooeLUbpLpnrKmZppwwkUGIKe0SQZbIZdHrWfHzuTzW4AaBUVOIZ) [19]

Signature Design by Ashley® Carmel Highlands Brown Wooden ...

<https://www.lfdfurniture.com/product/signature-design-by-ashley-carmel-highlandsbrown-wooden-outdoor-dining-table-with-dark-brown-base-pcp513-625-1835080>

[24] [31] 2025 Outdoor Living Colour Trends: Fresh Palettes for Spring <https://systempavers.com/blog/2025-outdoor-living-color-trends-fresh-palettes-for-spring>

[29] [30] Matte Colour Finish Trends | Sherwin-Williams <https://industrial.sherwin-williams.com/na/us/en/industrial-wood/mediacenter/articles/matte-color-finish-trends.html>

[33] 2025 Outdoor Trends: The Freedom of Not Following Trends <https://www.altekitaliadesign.it/en/stories/2025-outdoor-trends/>

[35] [36] [37] [45] [46] [51] Mueble de España - News - 5 Defining Outdoor Furniture Trends for 2025: A Professional's Guide <https://muebledeespana.com/newsroom/5-defining-outdoor-furniture-trends-for-2025-aprofessionals-guide>

[42] Triconville is the Creator of Moments at IFEX 2025 <https://triconville.com/blog/2025/03/20/triconville-is-the-creator-of-moments-at-ifex2025/>

[43] [44] Mueble de España - News - Salone del Mobile.Milano 2025: Spanish Outdoor Living – Design & Sustainability in Open-Air Spaces<https://muebledeespana.com/newsroom/salone-del-mobile-milano-2025-spanishoutdoor-living-design-sustainability-in-open-air-spaces>