

MAISON&OBJET BAROMETER

THE BAROMETER OF THE INTERNATIONAL DECOR,
DESIGN, AND LIFESTYLE INDUSTRY

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MAISON&OBJET
NEW&NOW

EDITORIAL MÉLANIE LEROY

Managing Director SAFI
Maison&Objet



Dear Industry Professionals,

Launched right after the COVID crisis, the twice-yearly Maison&Objet barometer was designed to measure the fluctuations of a marketplace in transition.

Since its first edition, we've carefully examined each shift and each crisis so we can offer precise insight into a design sector that's constantly adapting, using a resolutely client-focused approach.

Throughout this period, we've seen some turbulent times: COVID, logistics hold-ups, rising energy and raw material prices, and, last but not least, inflation. Despite these shake-ups, our industry has proven to be impressively resilient, resisting the successive waves of trouble while still innovating and renewing itself.

This barometer has become an invaluable tool for tracking these evolutions, understanding their impact, and identifying pathways to growth amidst all this upheaval.

Now, with this 10th edition, we've also gauged the mood in terms of current uncertainties for the first half of 2025, notably those connected to tariffs and the geopolitical situation.

Together, let's keep innovating and building a promising future for our industry, staying attentive to the needs and aspirations of those whom we serve.

We hope that this edition will offer you perspectives and keys to navigating a marketplace that is constantly changing, so you can seize future opportunities.

See you in September 2025 and January 2026 at the Maison&Objet fair! We can't wait to keep exploring with you.

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THE METHODOLOGY USED BY THE MAISON&OBJET BAROMETER

QUANTIFYING THE INDUSTRY FOR GREATER FORESIGHT

How is our industry doing? The best way to know is to ask its key stakeholders. Twice a year, Maison&Objet submits a questionnaire to a panel of professionals from the world of home and decor: how are their sales figures doing? How are purchasing, and business development looking?

Depuis sa mise en place en 2021, une trentaine d'indicateurs récurrents du Baromètre Maison&Objet Since its launch in 2021, around thirty recurring indicators from the Maison&Objet Barometer have provided a "health check" of the sector, enriched in each edition by a dedicated consultation on a current issue.

Every six months, nearly a thousand industry stakeholders from over a hundred countries take part.

RETAILERS

Independent shops, department stores, chain stores, wholesalers, distributors...

SPECIFIERS

Architects, interior designers, landscapers, real estate developers...

BRANDS

Manufacturers, designers, makers of decor, design or lifestyle products

The data in this report is based on the results of an online questionnaire conducted from March 17 to April 4, 2025, as part of the April 2025 barometer.

A total of 1,183 respondents participated, including 436 Brands, 410 Distributors, and 303 Prescribers. Our sample also includes responses from 34 individuals with other profiles (e.g., hotels, restaurants, etc.). However, no specific analysis will be conducted for these groups.

International Update: *The initial announcements made in early April by U.S. President Donald Trump regarding increased American tariffs disrupted financial markets and international trade relations, prompting us to re-survey our 1,183 respondents.*

Among them, 327 participants shared their updated market projections between April 22 and April 30, 2025.



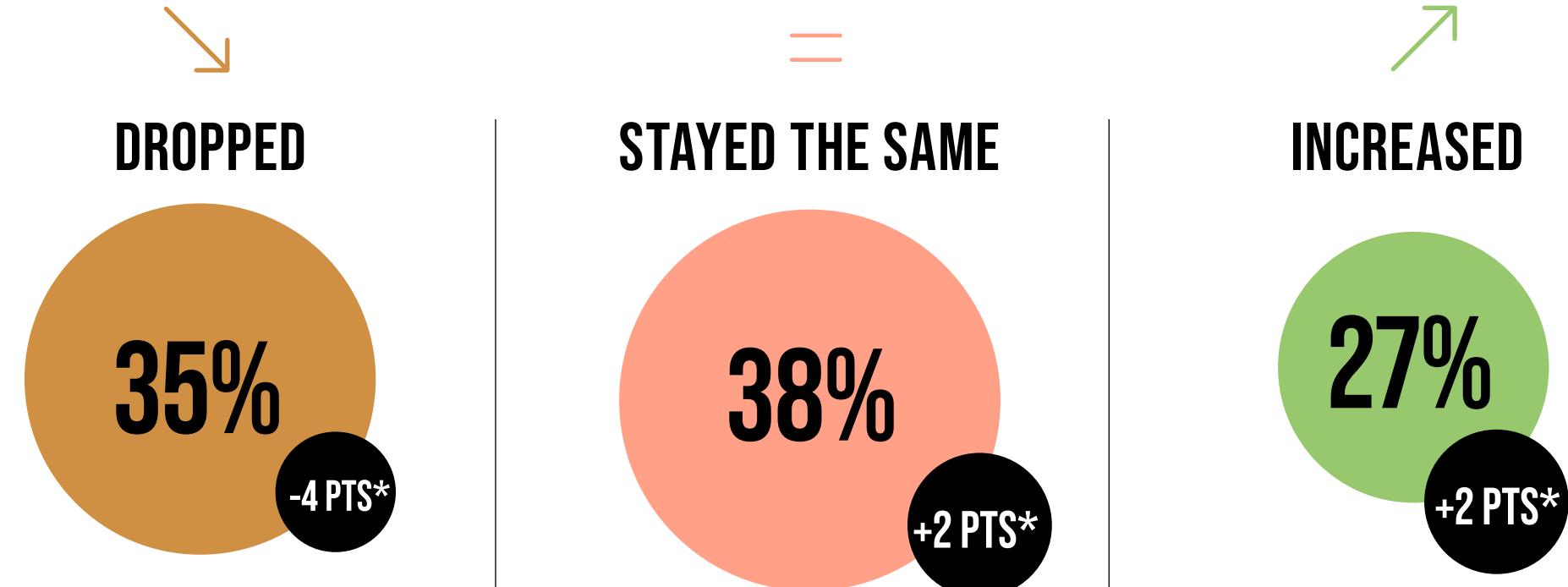
I.

REVIEW AND SALES FORECAST

STATE OF THE INDUSTRY FROM OCTOBER 2024 THROUGH MARCH 2025

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
HAS YOUR SALES REVENUE:

EFFECTIVE RESPONSES: 1183



Between October 2024 and March 2025, 65% of respondents in all categories state that their sales have remained even with last year, or even higher, for 27% of them.

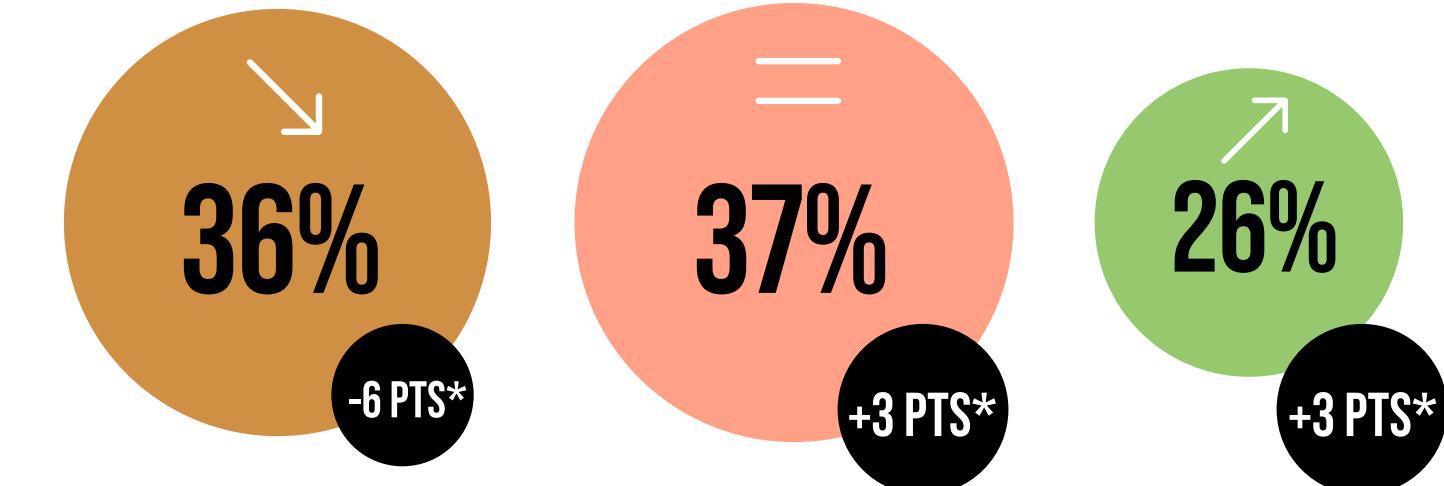
After many months of multiple crises, the mood of industry stakeholders seems to be turning a corner. Though respondents expressed some anxiety over current challenges, they have reaffirmed their desire to innovate to adapt to a constantly evolving marketplace.

They are showing resilience within the current environment, which we can see in all 3 of the categories of professionals we surveyed.

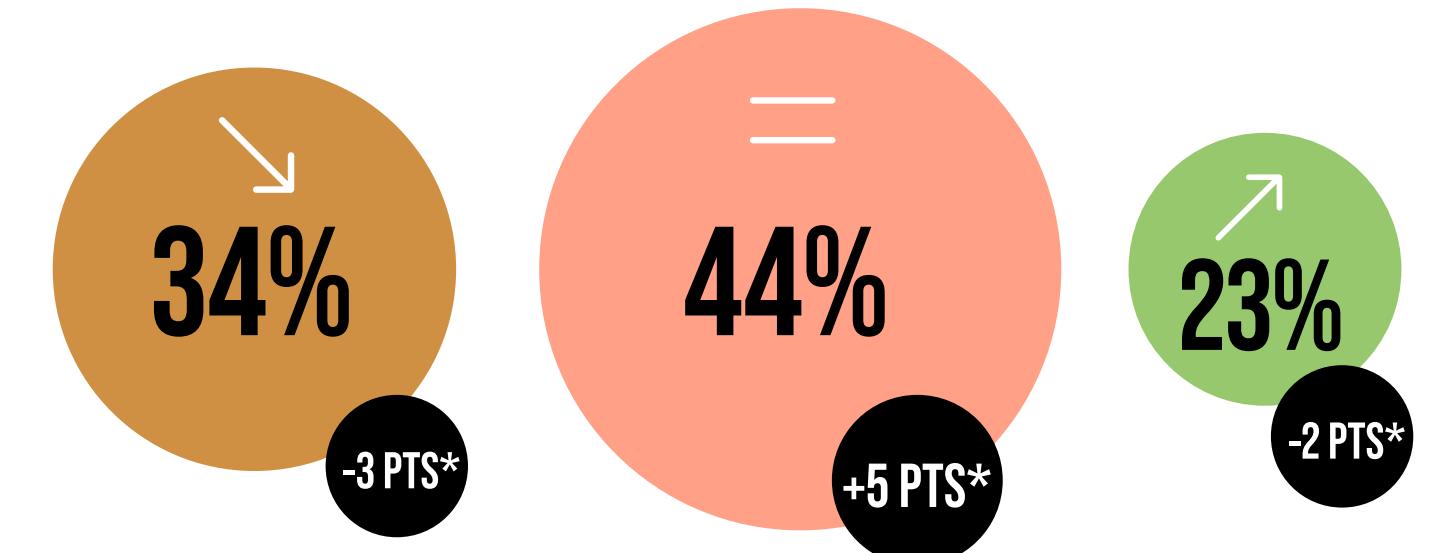
Population: 1,183 professionals of the decor, design, and lifestyle sector surveyed between March 17 and April 4, 2025.

*compared to the April 2024 barometer

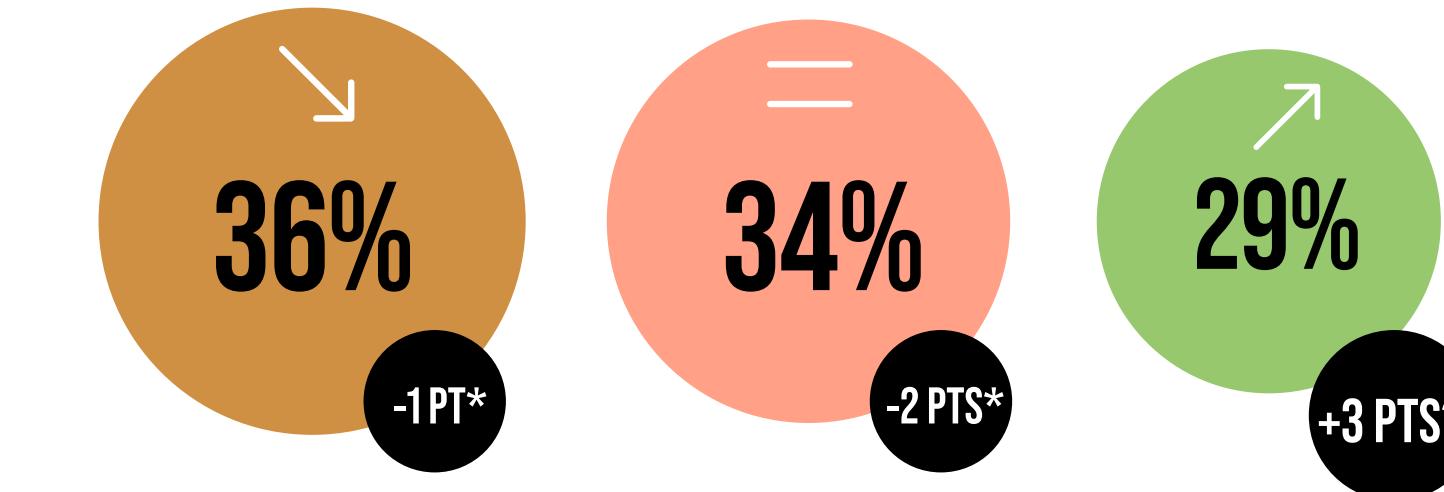
RETAILERS



SPECIFIERS



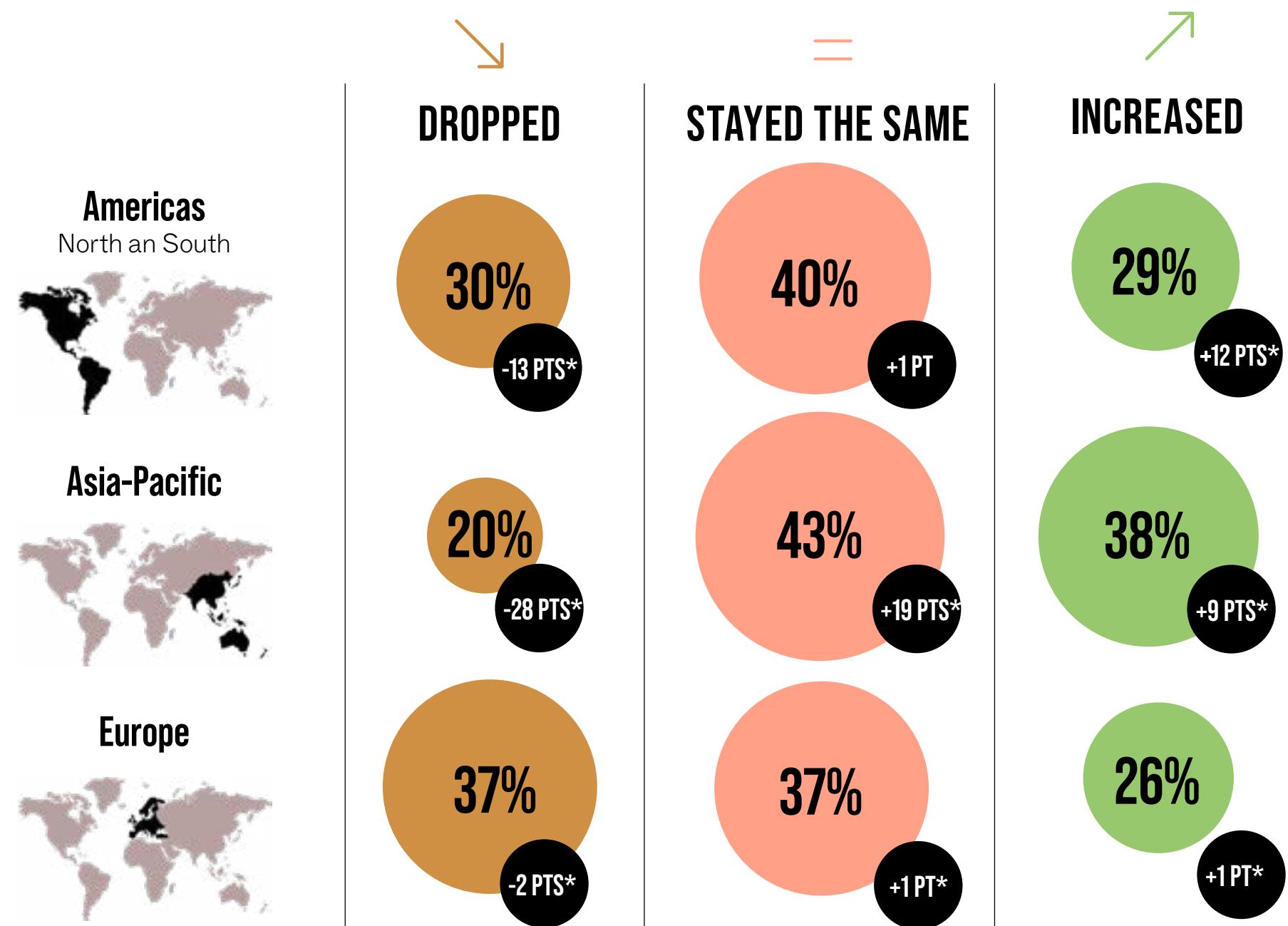
BRANDS



STATE OF THE INDUSTRY FROM OCTOBER 2024 THROUGH MARCH 2025

Our study reveals significant growth across certain geographic markets:

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
HAS YOUR SALES REVENUE:



69% of respondents based in North and South America managed to maintain or increase their revenue over the past six months.

In the Asia-Pacific region, that figure rises to 81%.

Meanwhile, the European market remains resilient: 63% of industry professionals in Europe report stable or growing revenue compared to the same period last year.

Population: 1,183 professionals of the decor, design, and lifestyle sector surveyed between March 17 and April 4, 2025.

* compared to the April 2024 barometer

“ The world of décor is still as interesting and ever-changing. Currently, it's more the political and environmental situation that's reducing the consumption of non-essential items. **”**

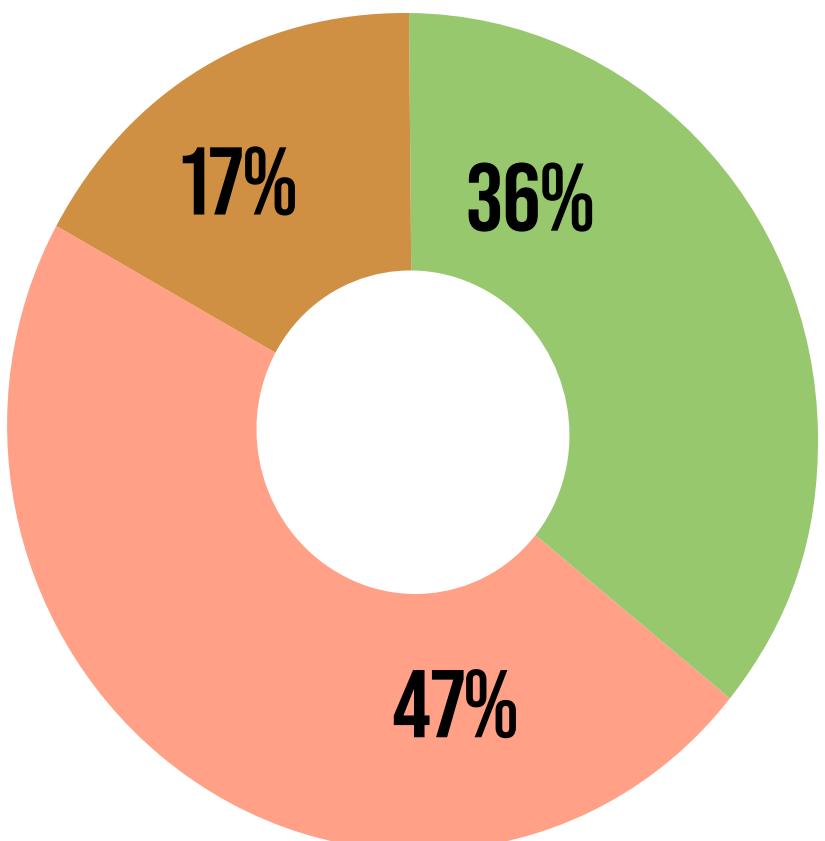
An independent deco shop
France

WHAT IS THE OUTLOOK FOR 2025?

OVER THE NEXT 6 MONTHS,
YOUR PROSPECTS IN TERMS OF SALES REVENUE LOOK:

POPULATION: 1,183 PROFESSIONALS OF THE DECOR, DESIGN, AND LIFESTYLE SECTOR
SURVEYED BETWEEN MARCH 17 AND APRIL 4, 2025.

■ POSITIVE
■ NEUTRAL
■ NEGATIVE

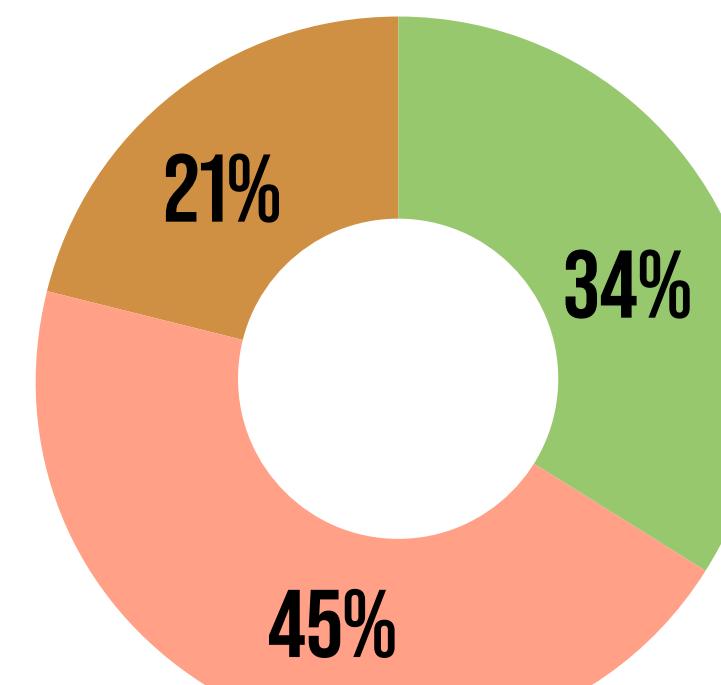


However, in early April, U.S. President Donald Trump announced the implementation of a 10% tariff on American imports and even a 125% tariff on goods coming from China, disrupting financial markets and international trade relations.

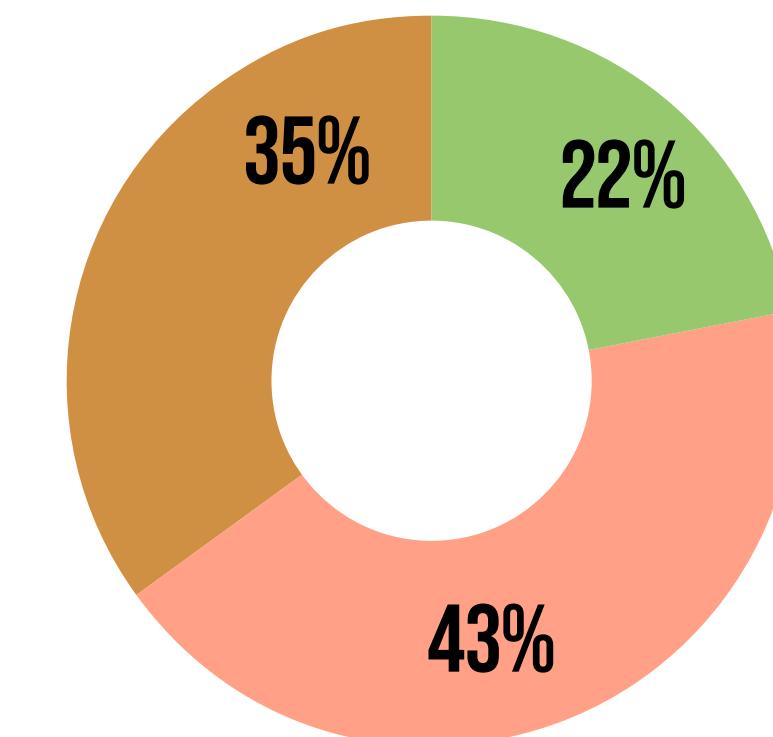
As a result, we re-surveyed our 1,183 respondents to gather updated projections. Among them, 327 participants responded again by answering three new questions.

OVER THE NEXT 6 MONTHS,
YOUR PROSPECTS IN TERMS OF SALES REVENUE LOOK:

■ POSITIVE
■ NEUTRAL
■ NEGATIVE



Prospects of these 327 professionals
surveyed between mid-march and early april



Prospects of the 327 professionals
surveyed in late april

Of the 327 professionals who responded again, 60% had not changed their outlook, 8% revised their outlook upward, and 32% revised their outlook downward.

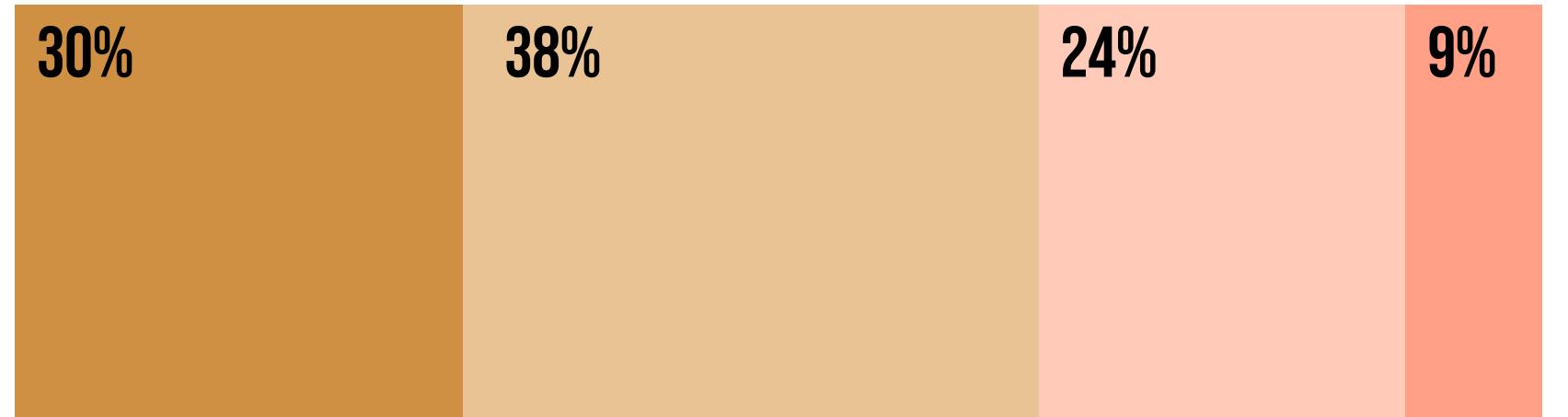
WHAT IS THE OUTLOOK FOR 2025?

7 out of 10 respondents share their concerns about the international trade situation:

IN VIEW OF THE CURRENT TENSIONS OVER CUSTOMS TARIFFS,
DO YOU FEAR THAT YOUR BUSINESS WILL BE AFFECTED?

EFFECTIVE RESPONSES: 327

- ABSOLUTELY
- RATHER YES
- RATHER NO
- NOT AT ALL



Their comments reflect direct impacts: rising supplier prices, slowed consumption, cautious consumers, and delayed investments. Yet, they also highlight the industry's ability to bounce back despite the challenges.

Even though a 90-day “truce” with China was initiated, by the end of April, stakeholders were already mobilizing to anticipate international renegotiations—seeking new suppliers or establishing more localized operations.

“The consumer confidence in the Netherlands dropped sharply in April (-37). I think this decline is due to the Ukraine/Russian war and the Tariff war. Very low consumer confidence could result in lower sales and higher consumer savings. My expectations for the next six months are still neutral, but a negative scenario is very possible.”

A department store
The Netherlands

“We can sense that clients are increasingly slow to pay their invoices, and pessimism is gradually taking hold. As for us, we've been working with American clients for over a decade. But there's no guarantee that this will continue, so we need to think ahead and look for prospects elsewhere.”

A French brand

“ We produce in countries that have been given the highest tariffs... luckily, we have reasonable stock in the US and our last shipment arrived just before the new tariffs were imposed. Nevertheless, we have been consulting with our client base, and they fully understand that there will be changes to our pricing structure. ”

A Swiss brand

“ For now, I’m paying close attention to how the situation is evolving. My business may indeed be impacted, notably in terms of the cost of raw materials and possible exports. This being said, I’m focusing as much as possible on local channels and suppliers, which partially offsets our dependence on international fluctuations. Nevertheless, I’m trying to keep in mind that indirect repercussions may be felt throughout the industry. ”

A French brand

“ The political upheavals and the domino effect this is having on the entire world are frightening and very unsettling. Things are on hold, uncertain what will happen after the trade war and the dismantling of our government services. ”

A collective of interior designers
USA

“ I believe there will be significant changes in the origin of goods, but not in terms of sales. ”

A decor shop
Argentina



NINA MAGON, PRINCIPAL AND FOUNDER OF STUDIO NINA MAGON

How is business in your field?

2024 was a challenging year for our industry overall, particularly with the uncertainty surrounding the U.S. election cycle, which caused a slowdown in large-scale project starts. However, we used that time strategically to refine our brand positioning, strengthen our internal team, and focus on elevating the client experience.

As a result, 2025 has started with tremendous momentum. Since launching our refreshed brand strategy, we have seen significant growth, securing new commissions across New York, Miami, Dubai, and London, including multiple ultra-luxury private residences and hospitality projects. Our pipeline is the strongest it's been in years, and we are now better positioned than ever to meet the rising demand for truly bespoke, experiential.

What are your business prospects for 2025?

We are highly optimistic about our business prospects for 2025.

Globally, the luxury real estate and hospitality markets are expanding again after a cautious 2024. Ultra-high-net-worth clients are investing in second and third homes, boutique hospitality concepts are prioritizing highly curated design, and branded residences continue to surge internationally. In particular, we are seeing strong demand in Miami, Dubai, London, and select cities in Saudi Arabia, which align perfectly with our studio's international focus. Clients are increasingly seeking design that goes beyond aesthetics — they want wellness integration, sustainability, and art-driven interiors that tell a personal story. Given these trends, Nina Magon Studio is extremely well-positioned to not only capture this demand but to help shape the next generation of luxury living.



**Given the current political and commercial tensions on customs tariffs,
do you think the sector will be impacted?**

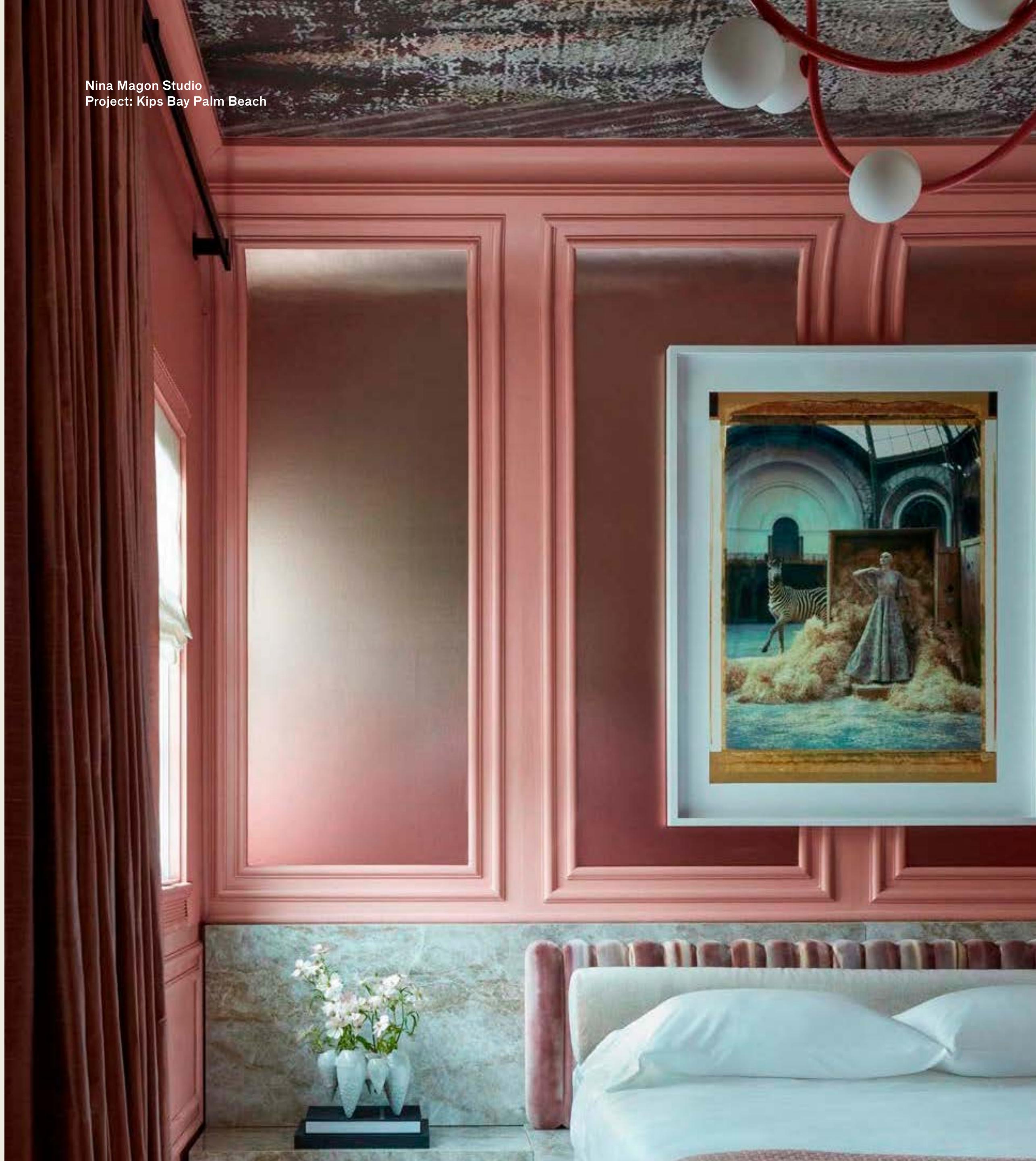
Yes, the current political and commercial tensions surrounding customs tariffs are poised to significantly impact the luxury interior design sector in 2025. The U.S. has implemented a 10% baseline tariff on all imported goods, with higher rates targeting specific countries, up to 145% on Chinese imports. These measures have led to increased costs for materials commonly used in high-end design, such as Italian marble, European oak, and artisanal textiles. For instance, the price of Italian Carrara marble has surged from \$180 to \$216 per square foot due to a 20% tariff.

Supply chain disruptions are also a concern. Many luxury furnishings and custom pieces rely on components sourced globally. Tariffs have caused delays in the availability of items like imported tiles and lighting fixtures, leading to extended project timelines.

In response, some designers and manufacturers are exploring alternative sourcing options, including domestic materials and suppliers, to mitigate the impact of tariffs. However, these adjustments may not fully offset the increased costs or match the quality and uniqueness of imported goods. Overall, the sector is navigating a complex landscape where strategic planning and adaptability are essential to manage the financial and logistical challenges posed by ongoing tariff tensions.



Nina Magon
Founder & Principal
of studio **NINA MAGON**
Houston, TX, USA

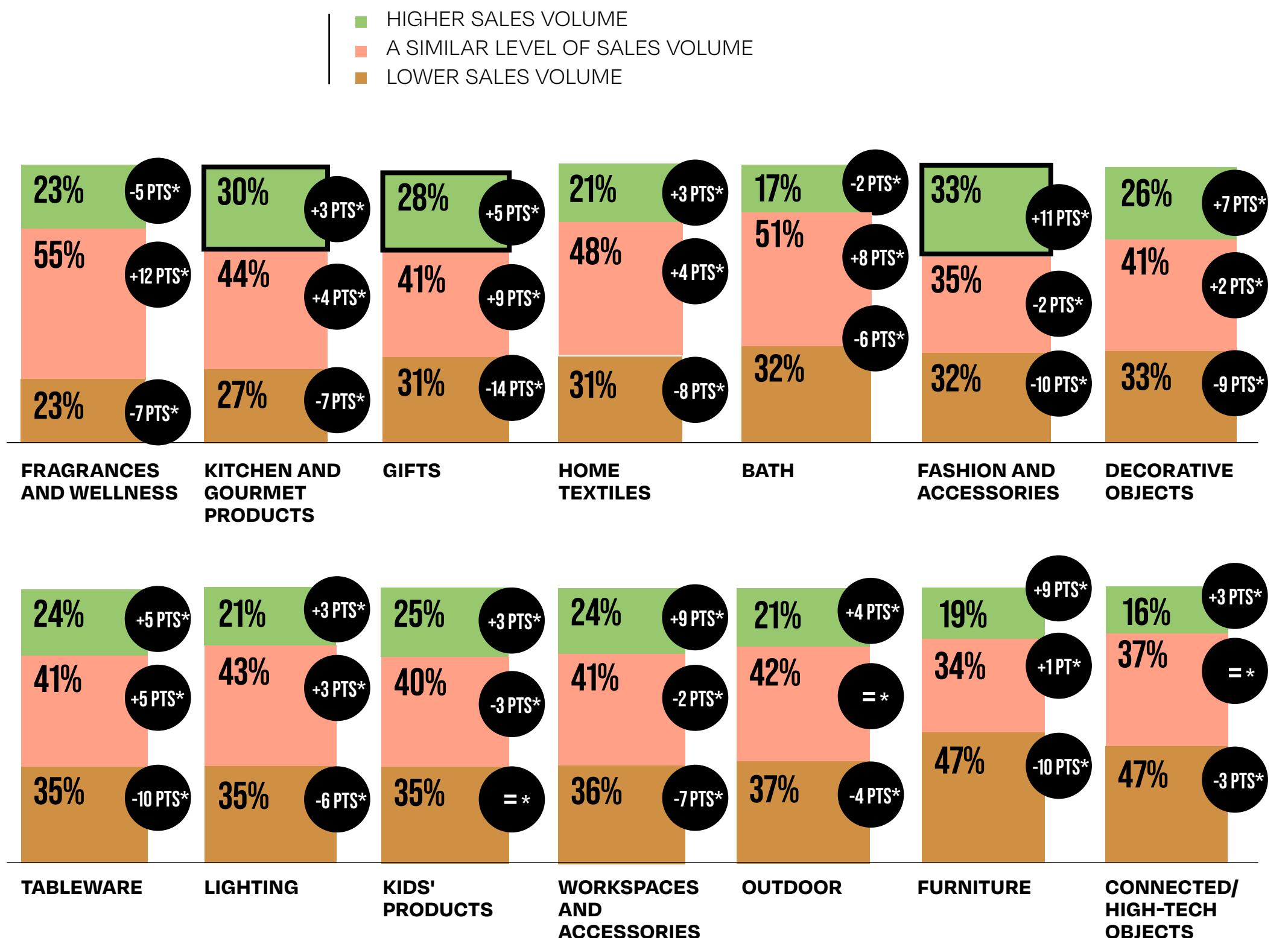


II.

RETAIL INDICATORS

PRODUCT CATEGORIES PERFORMANCE

COMPARED TO THE SAME PERIOD LAST YEAR,
WHAT HAVE YOUR RESULTS BEEN OVER THE PAST 6 MONTHS, PER PRODUCT CATEGORY?



Retailers: Independent shops, department stores, chain stores, e-commerce firms... surveyed between March 17 and April 4, 2025.

* compared to the April 2024 barometer

Overall, 7 out of 10 distributors succeeded in maintaining or even increasing their sales volumes across most product categories between October 2024 and March 2025.

These results are stronger than those recorded in the April 2024 barometer.

Some categories, in particular, showed more pronounced momentum:

28% of retailers reported an increase in sales volume in the gift segment. 30% observed growth in the kitchenware and grocery segment. 32% noted a rise in the fashion and accessories segment.

The slowdown in sales of furniture, connected objects and high tech can be seen at , especially among French retailers.

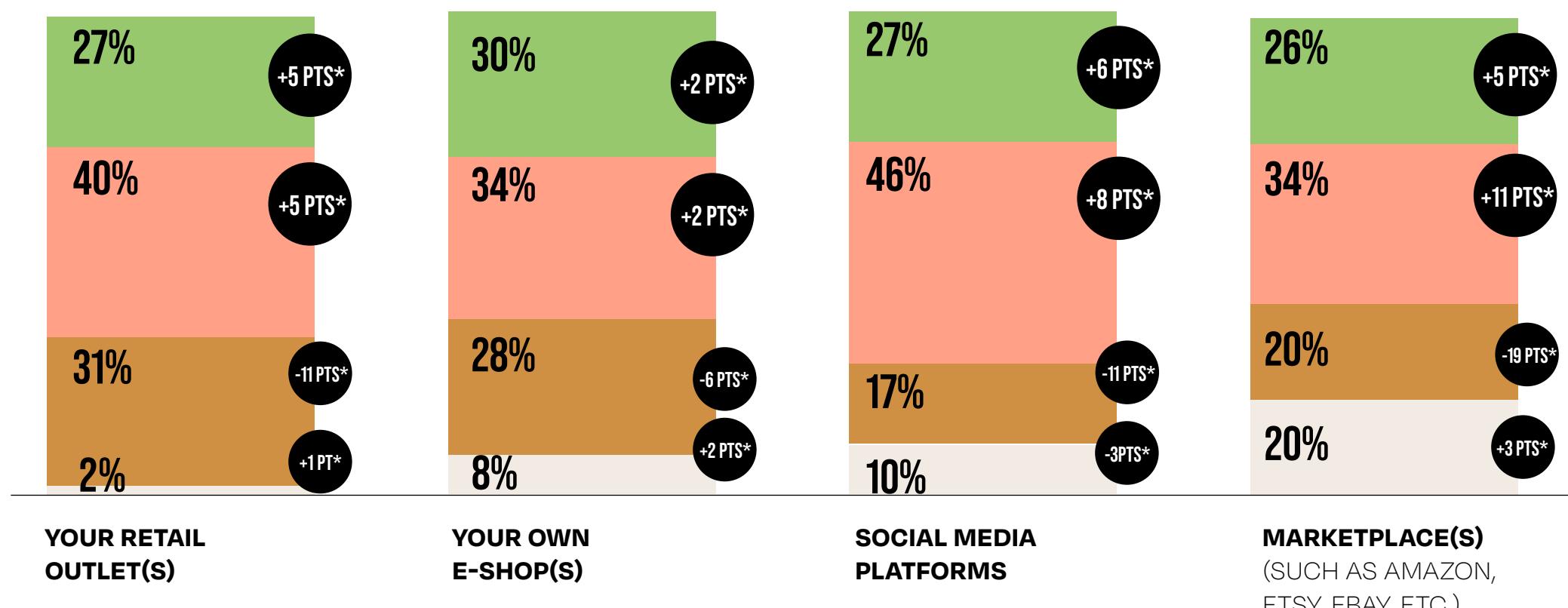
63% of retailers outside France sold the same or even higher volumes of furniture than in the same period last year, and 67% of retailers of connected and high-tech objects. The market remains dynamic. Specialized brands such as Kreafunk and Native Union will be making their comeback at the Maison&Objet show in September 2025.



SALES CHANNELS PERFORMANCE

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS, WOULD YOU SAY THAT YOUR SALES VOLUME FROM EACH RESPECTIVE SALES CHANNEL:

- HAS INCREASED
- STAYED THE SAME
- HAS DROPPED
- HAS GENERATED NO SALES



While previous editions of our barometer revealed varying sales trends across distribution channels, a clear pattern has emerged from October 2024 to March 2025: sales volumes have stabilized or even increased compared to the same period last year.

Although physical retail locations continue to face numerous challenges—such as operating costs and maintaining foot traffic—7 out of 10 distributors managed to maintain or grow their sales volumes during this period.

Despite a saturated competitive landscape, digital channels remain strong performers: Social media enables 7 out of 10 advertising distributors to sustain or boost their sales.

6 out of 10 distributors using online sales—whether through their own e-shops or marketplaces—also reported stable or growing sales over the period.

It is worth noting that organized retail networks are showing stronger momentum than independent retailers across all sales channels.

Among chains, department stores, and other networked distributors, 4 out of 10 respondents succeeded in increasing their in-store and online sales volumes, compared to just one-quarter of independents.

Retailers: Independent shops, department stores, chain stores, e-commerce firms... surveyed between March 17 and April 4, 2025.

** compared to the April 2024 barometer*

INVENTORY MANAGEMENT

“ Retail has slowed down because consumers are sticking with essentials due to fears about the future, an anxious atmosphere, or financial difficulties.

In addition, with COVID, lifestyle retail has largely switched to online sales, but unfortunately, many consumers are being sucked into low-cost platforms such as Temu via social media content. Decor and lifestyle products are also now omnipresent at discount outlets (such as Action) and food superstores (such as Lidl).

Low-cost brands have rather brilliantly learned how to latch onto trends, and prices being driven ever lower have fostered bad habits amongst consumers.

At the same time, French manufacturers have had to purchase their raw materials at even higher prices, and so, it becomes quite difficult to offer affordable ranges for retail.

Our retailers say that these days, they're mostly selling either items that cost less than 15€ or, alternately, large furniture items.”

A French brand

“ I believe it's important that we, as suppliers, support the stores so they can survive during these challenging times. But I also think the global situation will shift people's mindset – when things feel uncertain, there's a natural tendency to return to what feels familiar and safe. And that might actually give stores a real opportunity to make a comeback – not just as they were, but in a renewed and reimagined way.”

A brand from Poland

HOW MANY NEW BRANDS HAVE YOU SELECTED FOR YOUR ASSORTMENT OVER THE PAST 6 MONTHS?

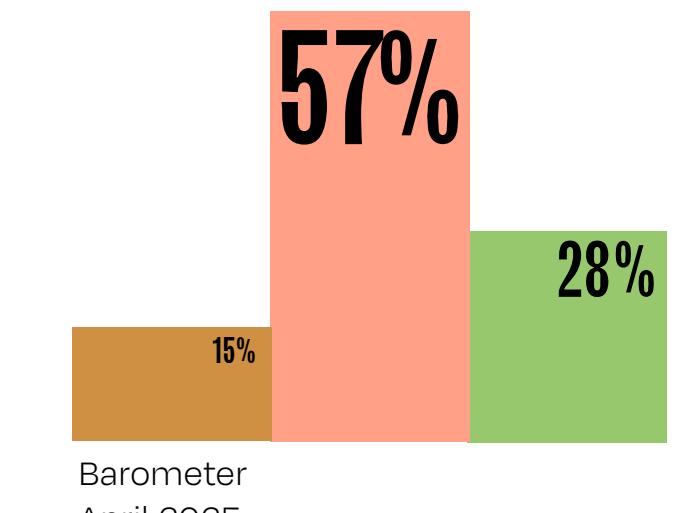
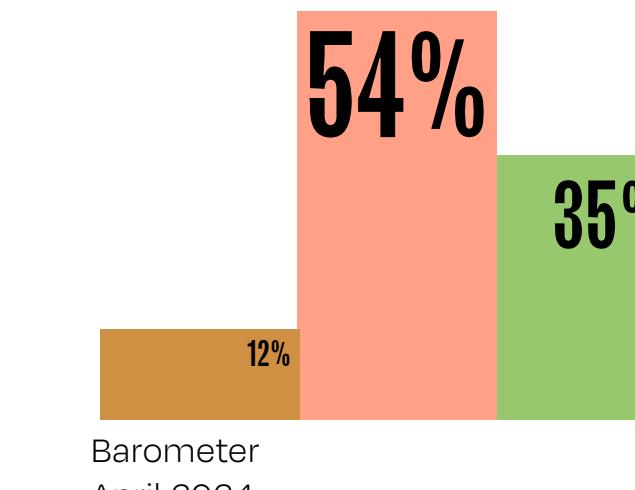
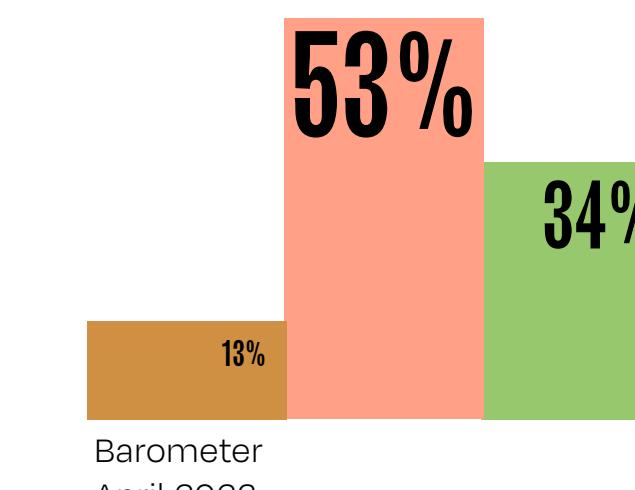
6 NEW BRANDS

added to inventory over the past 6 months, on average, between October 2024 and March 2025

Retailers remain on the lookout for new products, with 1 new supplier added to inventory per month on average

HOW WOULD YOU DESCRIBE YOUR CURRENT LEVEL OF PRODUCT/MERCHANDISE INVENTORY?

■ HIGH
■ NORMAL
■ LOW



57% of retailers report a normal stock of products/goods.

This stability is a sign of sound stock management and good rotation, but also of more cautious sourcing.

INVENTORY MANAGEMENT

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE NEXT 6 MONTHS,
DO YOU PLAN TO PLACE ORDERS WITH YOUR SUPPLIERS (BRANDS) THAT ARE...?

- LARGER
- ABOUT THE SAME SIZE
- SMALLER
- I DON'T PLAN TO PLACE ANY ORDERS



95% of distributors surveyed in our barometer plan to place orders between April and September 2025.

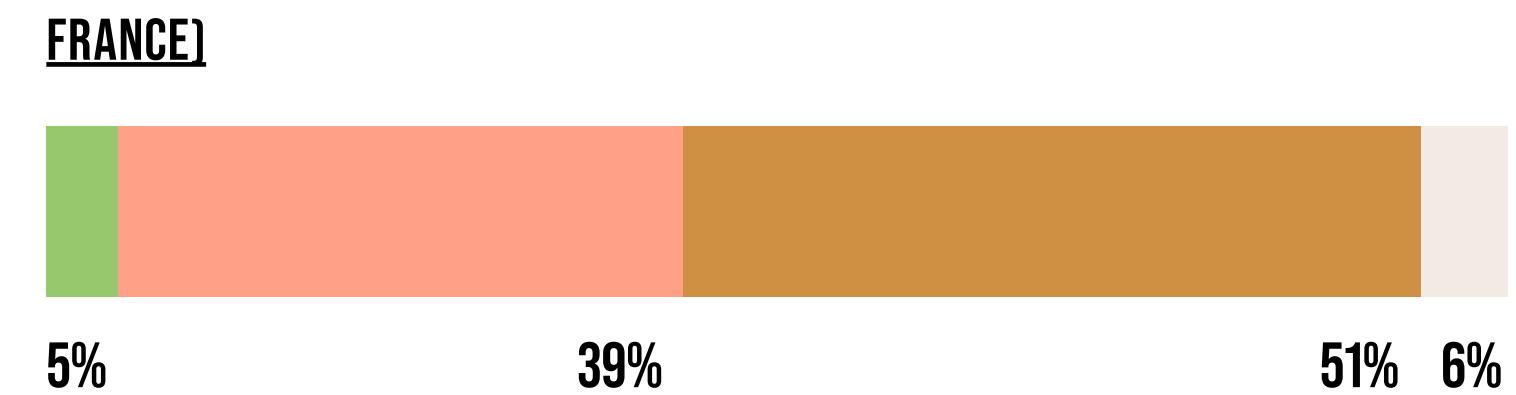
More specifically, 14% stated that these orders would be larger than during the same period last year, 42% expect them to be of similar volume, and 38% anticipate smaller orders. Order projections for the next six months are stronger than those observed in the April 2024 barometer.

However, caution is particularly evident among independent retailers, 43% of whom—across all regions—expect to place fewer orders.

Notably, in France, order forecasts for the next six months are especially cautious compared to the broader European market.

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE NEXT 6 MONTHS,
DO YOU PLAN TO PLACE ORDERS WITH YOUR SUPPLIERS (BRANDS) THAT ARE...?

- LARGER
- ABOUT THE SAME SIZE
- SMALLER
- I DON'T PLAN TO PLACE ANY ORDERS



EUROPE (OTHER THAN FRANCE)



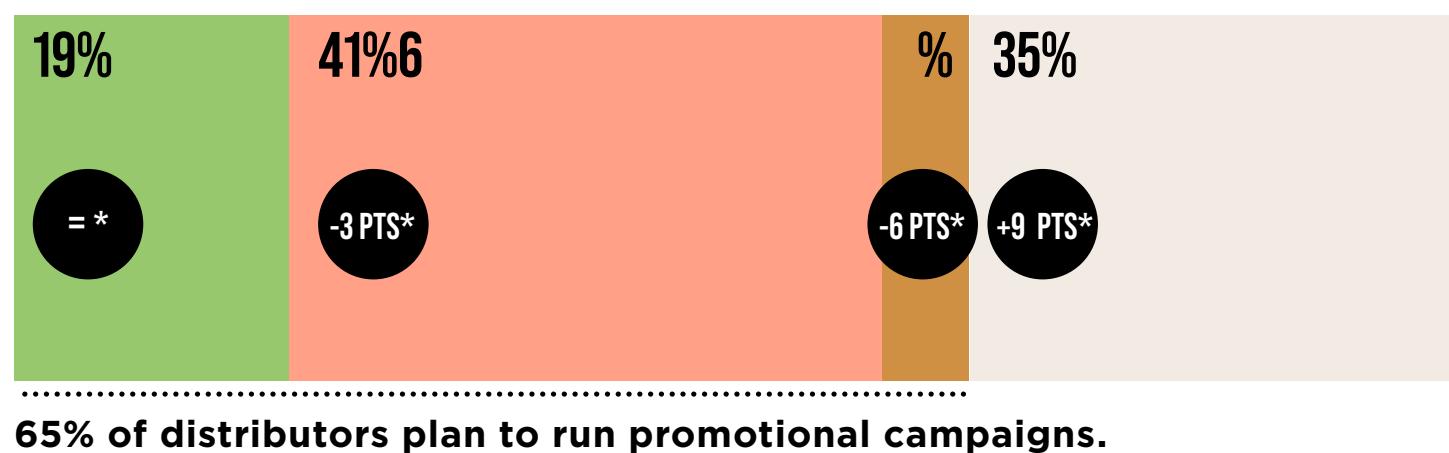
Retailers: Independent shops, department stores, chain stores, e-commerce firms... surveyed between March 17 and April 4, 2025.

** compared to the April 2024 barometer*

INVENTORY MANAGEMENT

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE NEXT 6 MONTHS,
DO YOU PLAN TO RUN PROMOTIONAL OFFERS THAT ARE...?

- LARGER
- ABOUT THE SAME SIZE
- SMALLER
- I DON'T PLAN TO PLACE ANY ORDERS



65% of distributors confirmed the implementation of promotional campaigns from April to September 2025, compared to 74% last year.

In a context of shrinking margins, more resellers are expected to limit discounts this year.

Retailers: Independent shops, department stores, chain stores, e-commerce firms... surveyed between March 17 and April 4, 2025.

* compared to the April 2024 barometer



MAISON&OBJET



EXPERTS HAVE THEIR SAY

FABIO MORONI, CEO OF MORONI GOMMA

CONCEPT STORE IN MILAN SINCE 1919

How is business in your field?

As Moroni Gomma we are active both as retailers and also importers and distributors of personal and household items.

2024 was not a bright year. There was, especially in the second half of the year a slowdown in private consumption, especially for semi-durable goods. The main cause was higher inflation and a greater propensity for spending related to leisure and vacations (entertainment, travel, dining out).

Christmas was confirmed as the winning period for our industry and did not experience any decreases. 2025, which initially began under better expectations, remains at last year's levels for the time being.

Unfortunately, many retailers are very cautious and have little liquidity due to the slowdown in consumption. Fortunately, in Italy there is a lot of tourism especially from abroad and this helps a lot in cities and resorts.



The Moroni Gomma concept store

What are your business prospects for 2025?

[As I said] The market in 2025 is stable trending downward. However, we are getting used to the new world order where the situation is extraordinarily complicated. Wars and threats affect us negatively. However, we are confident and hopeful.

We are always looking for new things in both trends and products. The public demands novelty, as always. It is difficult because we have everything, but there is always a search for objects that are useful but at the same time with a bit of design and fun.

Our research is always across the board, both in stores all over Europe and at fairs like Maison&Objet, which are always a source of inspiration.

Given the current political and commercial tensions on customs tariffs, do you think the sector will be impacted?

For the time being, we do not see a danger to our imports due to import taxes. The main problem is that in Italy some items are increasing too much: the cost of energy, transportation and other services and products which, due to inflation, have increased a lot (too much).



Fabio Moroni
CEO,
MORONI GOMMA
Milan, Italy

MAISON&OBJET



DELIA LACHANCE, FOUNDER & CHIEF CREATIVE OFFICER OF WESTWING

How is business in your field?

Despite a challenging macroeconomic environment, 2024 was a resilient and defining year for us. We reached €444 million in revenue, growing 4% year over year – which shows how strongly our community connects with our curated offering.

Our Westwing Collection now makes up over half of our sales, and we've modernized our brand identity with the 'Live Beautiful' campaign to reflect the emotional value we bring into our customers' homes.

What inspired me most was seeing how people are creating homes that tell their own story – with authenticity, emotion, and timeless style. That's exactly the kind of beauty we want to bring into the world with Westwing.

2025 started with strong momentum: we launched in new international markets like Luxembourg, Sweden and Denmark, and just recently opened our newest store at the iconic Printemps Haussmann in Paris – a dream project and a major milestone for us in expanding the offline Westwing experience.



What are your business prospects for 2025?

We entered 2025 with ambitious goals and a deep sense of purpose. Following the opening of our new store at Printemps in Paris – one of the most iconic retail destinations in Europe – we're planning to open a mid-single-digit number of additional offline stores in key cities, including upcoming locations in Munich and Berlin later this year. These physical spaces allow us to bring the Westwing world to life and connect with our community in a more immersive, emotional way.

At the same time, we're accelerating our international expansion, aiming to enter up to ten new European markets this year. Our Westwing Collection continues to grow strongly, and we're investing in digital innovation – from personalized shopping experiences to new formats like our TikTok Shop pilot. We believe that the future of home & living is both inspiring and integrated – across channels, cultures, and customer moments. And I'm incredibly excited for everything that's ahead.



Delia Lachance
Founder & Chief Creative Officer
of **WESTWING**
München, Germany



MAISON&OBJET



III.

SPECIFIER INDICATORS

III - SPECIFIER INDICATORS

CURRENT PROJECTS

5 NEW PROJECTS

signed, on average,
between October
2024 and March 2025



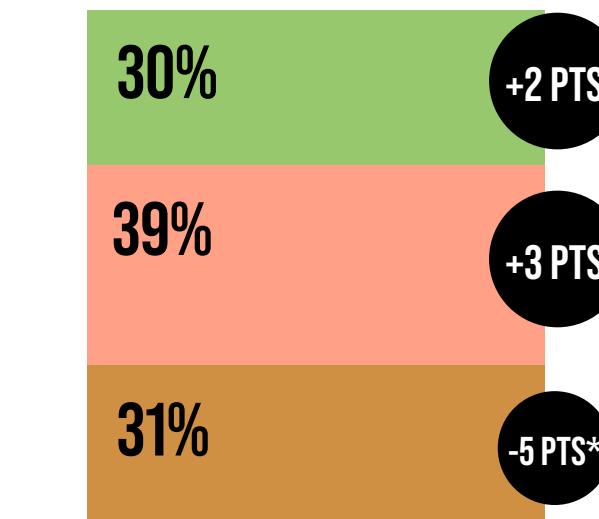
Specifiers: Interior designers, architects, real estate developers, landscape architects... surveyed between March 17 and April 4, 2025.

III - SPECIFIER INDICATORS

RESIDENTIAL

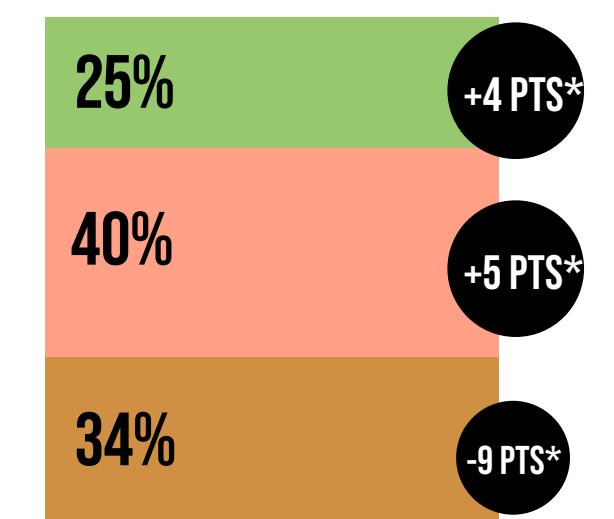
8 OUT OF 10 SPECIFIERS
ARE WORKING ON THIS TYPE
OF PROJECT

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
WOULD YOU SAY THAT YOU'VE HAD:



- A GREATER NUMBER OF PROJECTS THAN LAST YEAR
- THE SAME NUMBER OF PROJECTS AS LAST YEAR
- FEWER PROJECTS THAN LAST YEAR

69% of specifiers specializing in residential projects reported having as many or more construction sites between October 2024 and March 2025. This proportion has increased compared to the findings of the April 2024 barometer.



A focus on FRANCE

Looking more closely, the momentum was stronger among 39% of specifiers outside France, who reported having more projects than last year, compared to 25% of French specifiers. However, the French residential market is showing signs of recovery: falling interest rates, increased demand for loans from banks, and a slowdown in property prices are creating fertile ground for a rebound in real estate activity.

* compared to the April 2024 barometer

CONSTANCE DELAUX, ARCHITECT AND FOUNDER OF STUDIO ADD

How is business in your field?

In contrast with previous years, when we were juggling numerous projects simultaneously, producing an average of 15 projects a year, in 2024, we concentrated our efforts on 2 major projects, including the total renovation and decor of a 1000 m² primary residence in Bordeaux.

The Studio experienced a fascinating year, marked by real growth and the introduction of a new way of doing business: we now focus on over-arching, complex projects, making use of the full range of our internal resources and skills, from overall and technical architecture, down to décor and the furnishing of each of our projects.

This holistic approach has allowed us to make a name for ourselves in the market for high-end, unusual projects in the Bordeaux region and its surrounding area, thus ensuring a stable, growing business over time.

What are your business prospects for 2025?

Our prospects for 2025 are encouraging, confirming the momentum underway over the past 3 years. Our "order book" is full through the third quarter of the year. I have chosen to work on projects one after the other, so we can fully dedicate our energy to each successive project.



Constance Delaux
Architect and Founder of Studio Add
Bordeaux, France

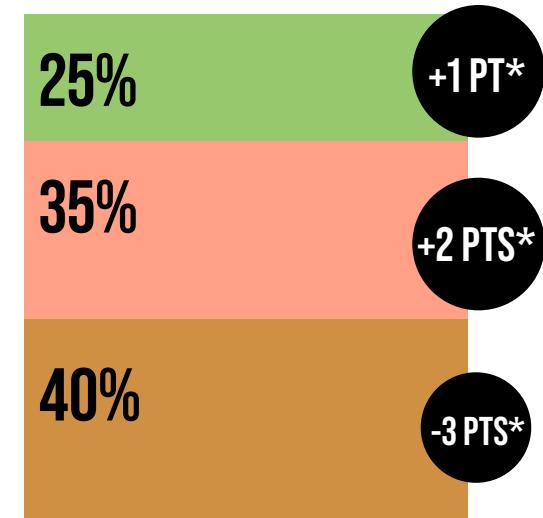


III - SPECIFIER INDICATORS

SHOPS/RETAIL SPACES

4 OUT OF 10 SPECIFIERS
SURVEYED ARE WORKING
ON THIS TYPE OF PROJECT

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
WOULD YOU SAY THAT YOU'VE HAD:



- A GREATER NUMBER OF PROJECTS THAN LAST YEAR
- THE SAME NUMBER OF PROJECTS AS LAST YEAR
- FEWER PROJECTS THAN LAST YEAR

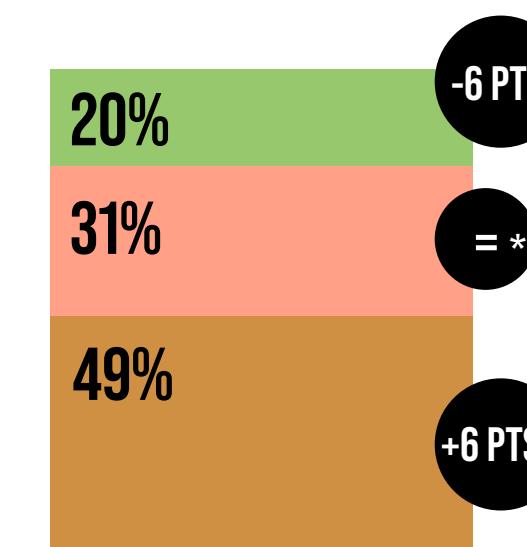
60% of specifiers involved in retail or boutique layout projects reported having as many or more projects between October 2024 and March 2025 compared to the same period last year. This is an encouraging sign that reflects the continued momentum in store openings, despite the ongoing challenges facing the retail sector.

III - SPECIFIER INDICATORS

OFFICES/WORKSPACES

1/2 OF SPECIFIERS
ARE WORKING ON THIS TYPE
OF PROJECT

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
WOULD YOU SAY THAT YOU'VE HAD:



- A GREATER NUMBER OF PROJECTS THAN LAST YEAR
- THE SAME NUMBER OF PROJECTS AS LAST YEAR
- FEWER PROJECTS THAN LAST YEAR

When it comes to office and workplace design projects, our barometer indicates a modest level of activity. In Europe, for example, “the market is facing a politically and economically uncertain environment in some countries, along with investor caution regarding this asset class,” according to Argie Taylor, Head of the International Investment Group at BNP Paribas Real Estate ⁽¹⁾.

Caution, however, does not mean distrust: investments in European commercial real estate surged by 21% year-over-year at the end of 2024.

Specifiers: Interior designers, architects, real estate developers, landscape architects... surveyed between March 17 and April 4, 2025.
* compared to the April 2024 barometer

⁽¹⁾ Ressources : Bureaux en Europe : Le point sur les marchés utilisateurs et investisseurs

EXPERTS HAVE THEIR SAY

ELENA LE BIHAN, INTERIOR DESIGNER IN PARIS, FOUNDER OF STUDIO SANS SOUCI

How is business in your field?

Business in our field has seen some interesting shifts over the past two years. Though residential business has slowed down somewhat due to economic uncertainty and rising costs, demand for the renovation and design of professional spaces, specifically offices, has significantly increased. This phenomenon can be explained by a greater need to adapt workplaces to new expectations in terms of flexibility, well-being, and sustainability. 2024 was a particularly dynamic year for Studio Sans Souci, with a wide variety of projects, ranging from Parisian apartment renovations to the transformation of commercial spaces. We've also noticed a marked increase in demand from the service sector, notably for updating office and commercial spaces, with a clear interest in having more functional and inspiring workplaces.

What are your business prospects for 2025?

2025 got off to a good start, with our order book already quite full and several collaborations underway. We're approaching this year with lots of enthusiasm and ambition. We have two main priorities: continuing to offer customized support, with a focus on the customer experience and the unique identity of each project, while including even more sustainable solutions. The renovation market, specifically for offices, keeps growing, and we expect an increase in demand for hybrid spaces that blend recreational and professional uses. We will also be accentuating our commitment to sustainable development by choosing materials that respect the environment and collaborating with local and European artisans.



**Given the current political and commercial tensions on customs tariffs,
do you think the sector will be impacted?**

It's clear that geopolitical tensions and uncertainty around tariff policies can influence costs and supply lead times, especially for certain imported materials or furnishings. Still, at Studio Sans Souci, we've always emphasized a local and regional approach, placing a priority on collaborating with French and European suppliers and craftspeople. This strategy allows us to better manage fluctuations in the prices of imported materials, while it supports the local economy and highlights local expert skills, an integral part of our firm's DNA. This resilience when faced with external uncertainties permits us to keep offering our clients creative and sustainable solutions, without compromising on quality or deadlines.



Elena Le Bihan
Interior Designer and Founder
of Studio Sans Souci
Paris, France



MAISON&OBJET

Studio Sans Souci
Project: Spa Sambre-et-Meuse

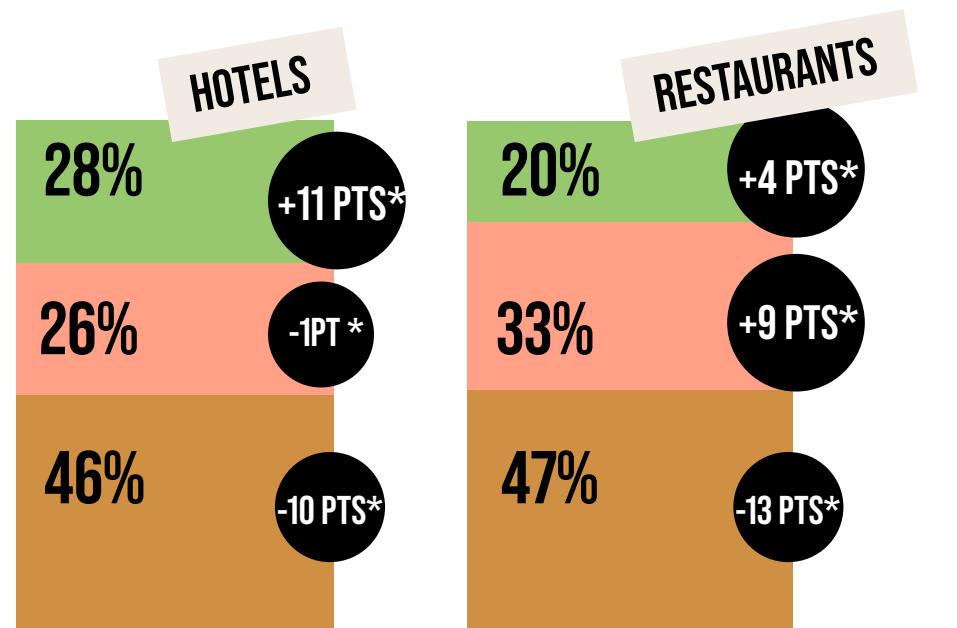


III - SPECIFIER INDICATORS

HOTELS AND RESTAURANTS

4 OUT OF 10 SPECIFIERS
SURVEYED ARE WORKING
ON HOSPITALITY PROJECTS

COMPARED TO THE SAME PERIOD LAST YEAR, OVER THE PAST 6 MONTHS,
WOULD YOU SAY THAT YOU'VE HAD:



- A GREATER NUMBER OF PROJECTS THAN LAST YEAR
- THE SAME NUMBER OF PROJECTS AS LAST YEAR
- FEWER PROJECTS THAN LAST YEAR

Hospitality and restaurant projects appear to be rebounding.

In April 2025, 28% of specifiers reported having worked on more hotel projects between October 2024 and March 2025, compared to 17% the previous year. This growth is being driven globally, notably by the luxury hotel segment, which outperformed in 2024 and is expected to do so again this year.

The market is projected to reach 166.4 billion dollars, up from 154.3 billion dollars last year, supported by emerging trends such as eco-luxury, museum hotels, and experiential luxury, according to the Luxury Hotelschool Paris ⁽¹⁾.

In the restaurant sector, 53% of specifiers surveyed by the barometer reported having had as many or more projects and construction sites during the same period.

Specifiers: Interior designers, architects, real estate developers, landscape architects... surveyed between March 17 and April 4, 2025.

* compared to the April 2024 barometer

(1) Hôtellerie de luxe : croissance soutenue, dynamique record et ambitions XXL en 2025 - Luxury Hotelschool Paris



MAISON&OBJET



EXPERTS HAVE THEIR SAY

ADRIAN DUEÑAS, CEO OF BeDESIGN

How is business in your field?

The Resilient Trajectory of Luxury European Design in the American Market

BeDesign, representing approximately 50 premium European furniture lines, has maintained an impressive growth trajectory throughout its decade-plus presence in the market. While 2024 presented certain challenges—with the presidential election cycle traditionally impacting luxury purchases and unprecedented weather catastrophes affecting multiple sectors across the United States—our business demonstrated remarkable resilience.

The dawn of 2025 has exceeded all expectations. January alone nearly matched what we would consider a strong quarterly performance, setting an optimistic tone for the year ahead. The residential sector has maintained steady momentum, while we're witnessing the emergence of several significant development projects that promise to reshape the luxury landscape.

Among these exciting ventures is our involvement with the prestigious Waldorf Astoria hotel and residences in Texas — a project that exemplifies the growing appreciation for sophisticated European design aesthetics in unexpected locations.

The robust pipeline of upcoming large-scale developments fuels our confidence and passion. These projects not only strengthen our market position but also reaffirm our dedication to bringing the exquisite craftsmanship and timeless elegance of European design to discerning American clients.

In an era where quality and authenticity are increasingly valued, BeDesign stands at the forefront of a movement that celebrates the beauty of perfection in European design—a philosophy that continues to resonate deeply with our clientele despite market fluctuations.



What are your business prospects for 2025?

Business Prospects for 2025

Our outlook for 2025 is exceptionally promising. We remain confident these are merely delays rather than cancellations. Our Texas portfolio alone includes four high-end branded residences and hotels, positioning us strongly in the luxury development market.

The branded residence sector—particularly properties aligned with fashion houses and renowned furniture manufacturers—continues to flourish. This trend has significantly benefited our business model, and we've developed specialized expertise in managing these distinctive projects. We've perfected the equation that balances profitability with delivering exceptional value to both our immediate clients and end consumers.

For 2025, our strategic focus centers on three key initiatives:

1. **Digital Marketing Transformation**: We're investing in sophisticated digital marketing strategies to enhance our market presence and client acquisition channels.

2. **Artificial Intelligence Integration**: We're deploying AI tools across our operations to streamline processes, enhance design capabilities, and provide personalized client experiences.

3. **Experiential Client Engagement**: A significant portion of our budget is allocated to creating immersive client experiences, including curated trips to European manufacturing facilities. These journeys allow clients to witness the craftsmanship behind the luxury products incorporated into our developments.

In today's technology-driven era, European high-end craftsmanship—with its handmade precision and unique artistic touches—continues to distinguish our offerings in the marketplace.

Through these strategic initiatives, we're positioned to strengthen our market leadership in luxury branded developments while delivering exceptional value to our stakeholders.

Given the current political and commercial tensions on customs tariffs, do you think the sector will be impacted?

Navigating Global Tensions with Elegance

The shifting landscape of international tariffs certainly casts shadows across luxury markets. When these trade measures first emerged, an across-the-board 10% tariff increase initially created market uncertainty. I'm pleased to share that both our manufacturing partners and Bedesign have strategically absorbed these additional costs, ensuring our discerning clientele remains unaffected.

Should these tariffs remain at current levels, our clients will continue to enjoy seamless access to exceptional design. While we fundamentally believe in economic diplomacy based on equality and reciprocity between nations, we prefer addressing concrete challenges rather than fueling speculation.

Amidst these global currents, our focus remains unwavering: transforming spaces into breathtaking environments that elevate the human experience. This passion transcends political fluctuations and economic headwinds. After all, as our signature philosophy reminds us—it's not simply about design, it's about how you live.



Adrian Dueñas
CEO,
BeDESIGN
Houston, TX, USA



EXPERTS HAVE THEIR SAY

A PARISIAN 5-STAR HOTEL SPEAKS

How is business in your field?

The tourism and hotel businesses are doing well. The year 2024 was marked by the Olympic Games, which brought major visibility and high earnings to many tourism professionals.

What are your business prospects for 2025?

This year is benefiting from the wonderful image we have abroad, and client demand is high. We started off the year in fine style, and we're prioritizing customer retention and the growth of new markets.

Given the current political and commercial tensions on customs tariffs, do you think the sector will be impacted?

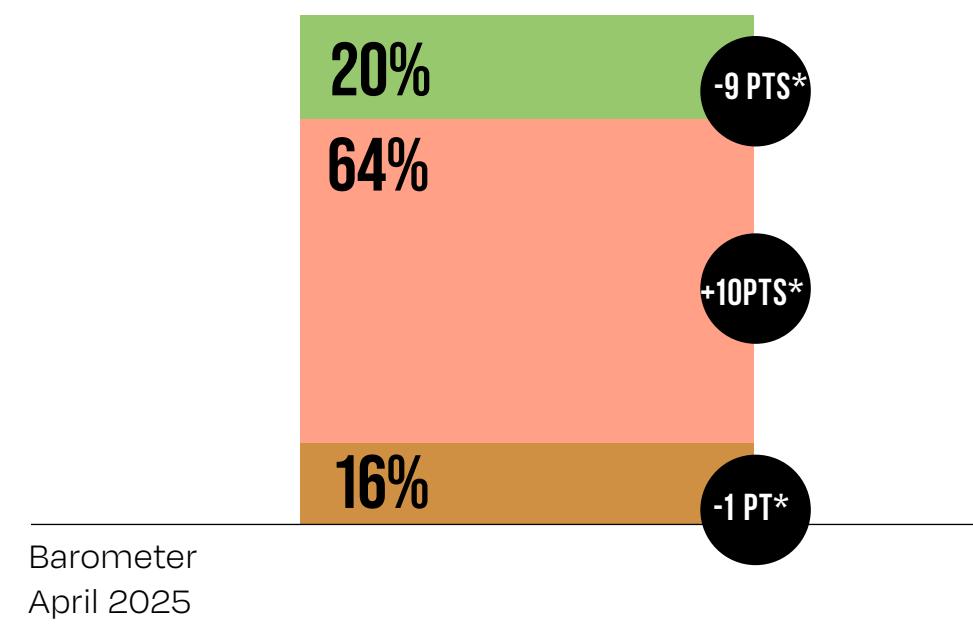
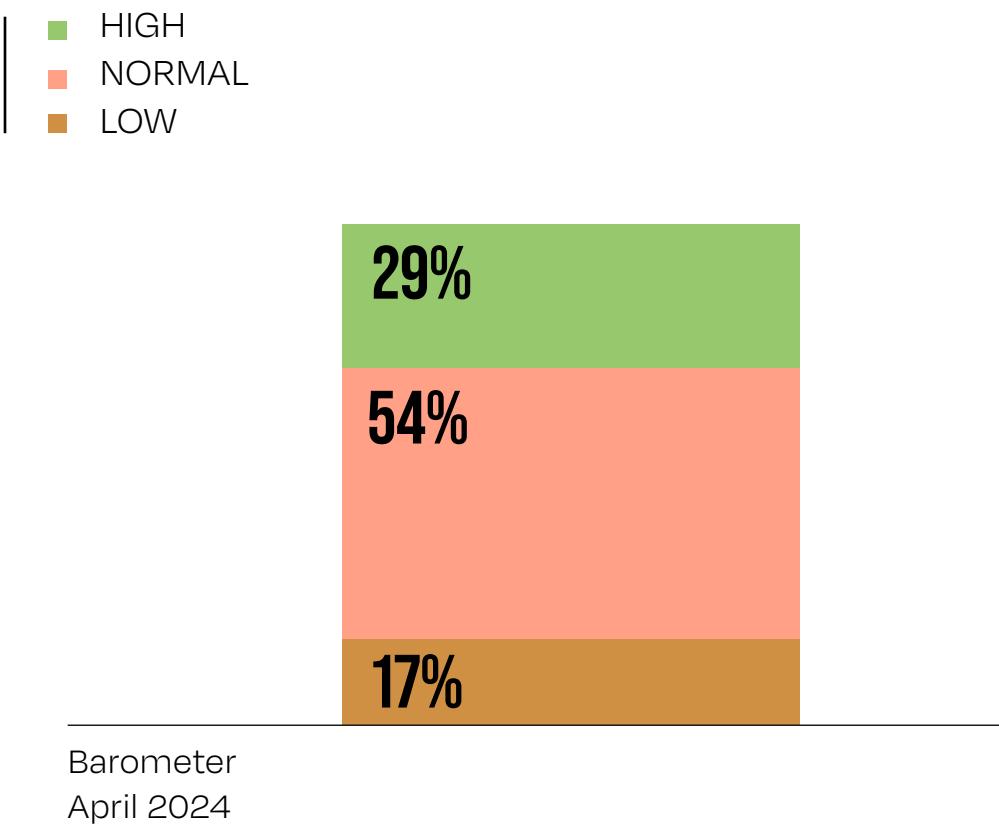
Tariffs are indeed a source of considerable doubt, with clients having so many questions in their minds. Nevertheless, these worries have yet to impact the level of inquiries we're receiving or our customers' habits.

IV.

BRAND INDICATORS

LEVEL OF PRODUCT/MERCHANDISE INVENTORY

HOW WOULD YOU DESCRIBE YOUR CURRENT LEVEL OF PRODUCT/MERCHANDISE INVENTORY?



Through their feedback, brands highlight the market's conflicting imperatives:

- A growing need to rethink production in a more responsible way, while remaining desirable in an economically turbulent environment.
- A generalized rise in costs (raw materials, energy, transport, communication, and overheads), in contrast with the proliferation of low-cost imitations.
- The need to integrate new digital advancements, such as artificial intelligence, while questioning the future of creativity.
- The need to explore new growth drivers, while supporting a distribution model that must continue to evolve to remain viable.

Despite these pressures, brands reaffirm their commitment to innovation and adaptability.

Brands: Manufacturers, designers, makers of decor, design or lifestyle products..., surveyed from March 17th to April 4th, 2025

* compared to the April 2024 barometer

“ It used to be that we'd face a major economic shock every 8 to 10 years on average. Post-Covid, it feels like we're navigating a new wave of uncertainty almost every year. Whether it's through regionalization or diversification into new markets, we're still constantly challenged by supply chain disruptions. Luckily, things are still manageable, just moving forward and working on new opportunities. **”**

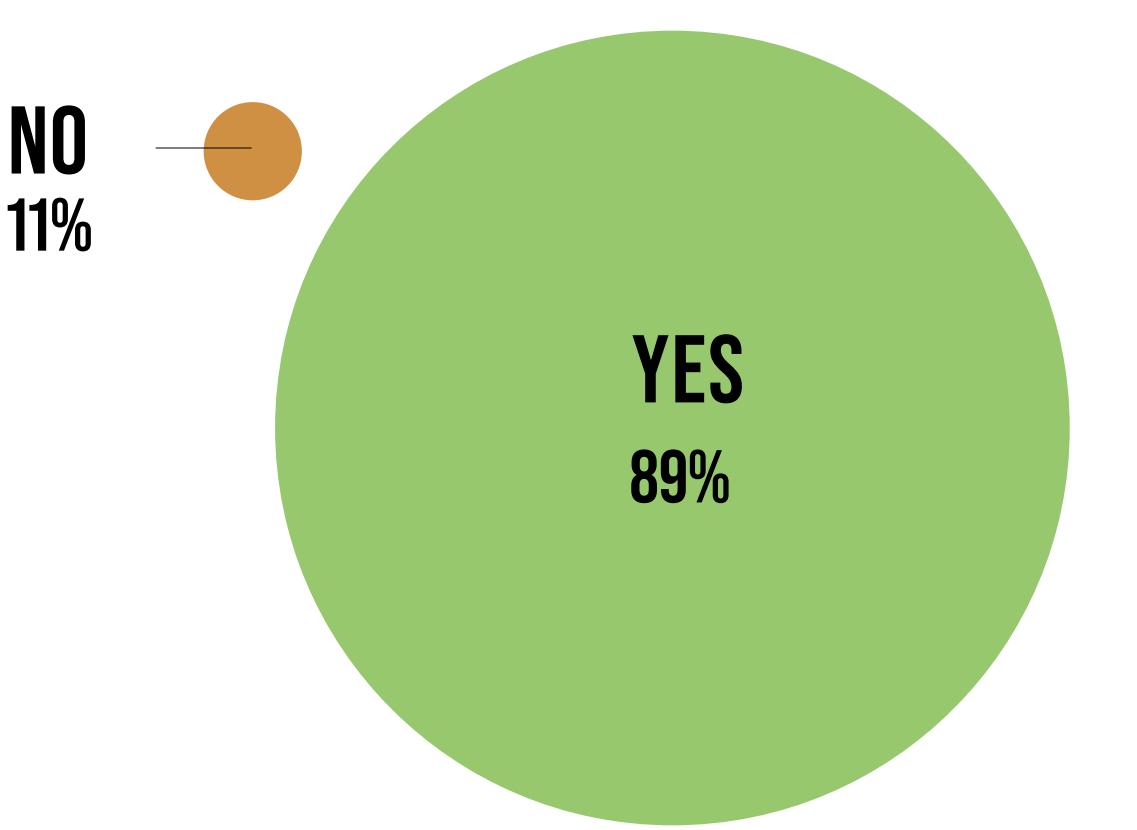
A product designer

“ The design and furnishings industry is going through a fascinating period full of challenges. The urgency of the ecological crisis is pushing us all to rethink materials, production cycles, and even how we relate to objects. In terms of consumers, they're looking for flexible and sustainable spaces that are infused with meaning. The digital sphere is also opening up new opportunities for personalization, augmented reality, online shopping, and more. But how do we keep emotion and authenticity at the heart of design in an increasingly virtual world? And finally, the circular economy is shaking up all our habits by encouraging us to repair, re-use, and transform products rather than simply consume infinitely. This is a real change of mindset, and it's truly interesting to be a part of this process. **”**

A French design house

NEW PRODUCT LAUNCHES

DO YOU PLAN TO LAUNCH ANY NEW PRODUCTS OVER THE NEXT 6 MONTHS?



89% of the brands surveyed confirmed the launch of new products between April and September 2025. There is no doubt that discovery and creativity will be in full swing this fall at the Maison&Objet Paris trade show.

Brands: Manufacturers, designers, makers of decor, design or lifestyle products..., surveyed from March 17th to April 4th, 2025



MAISON&OBJET



ROOSHAD SHROFF, OWNER/PRINCIPAL DESIGNER OF ROOSHADSHROFF

How is business in your field?

We ended 2024 on a high note with a large-format solo exhibition showcasing our latest furniture collection, *_Balance_*. The show was extremely well received, garnering both local and international attention from collectors, curators, and institutions. The momentum generated by this collection has inspired us to further invest in the furniture side of our practice, culminating in the launch of our own dedicated gallery space in Ballard Estate, Mumbai, just last month. This marks a significant milestone for the studio—offering a permanent space to engage with our audience and present handcrafted, collectible design in an immersive setting.

Beyond furniture, architecture and interior design continue to be the studio's core focus. The scale and complexity of our commissions have grown considerably, with several large-scale residential and commercial projects currently underway. We anticipate continued strength in this area through 2025, particularly as discerning clients increasingly seek bespoke design rooted in materiality and craft.

Regionally, there's an evident cultural shift—India is embracing and celebrating homegrown design more actively than ever. There's a growing ecosystem around collectible design, supported by curatorial platforms, cultural festivals, and institutions in cities like Mumbai, Delhi, and Goa. Simultaneously, India's reputation as a hub for luxury artisanal craftsmanship is attracting international attention, enabling new opportunities for creative collaborations and global showcases.



What are your business prospects for 2025?

Looking ahead to 2025, our primary focus is on deepening our engagement with craftsmanship and the handmade. With the opening of our gallery space, we plan to develop a curatorial program that highlights the intersection of design, craft, and contemporary culture—through exhibitions, limited editions, and collaborative installations. The goal is to not only showcase new work but also foster dialogue around the future of artisanal design in India.

Given the niche nature of our practice—offering highly customised interiors and products for the ultra-luxury segment—we're seeing sustained and growing demand. The market for bespoke, handcrafted design remains strong, especially in Mumbai and across India, where there is a rising appreciation for intentional, slow-made work. We're also exploring international opportunities, with interest from galleries and collectors abroad, which could lead to potential partnerships and showcases in key global cities.

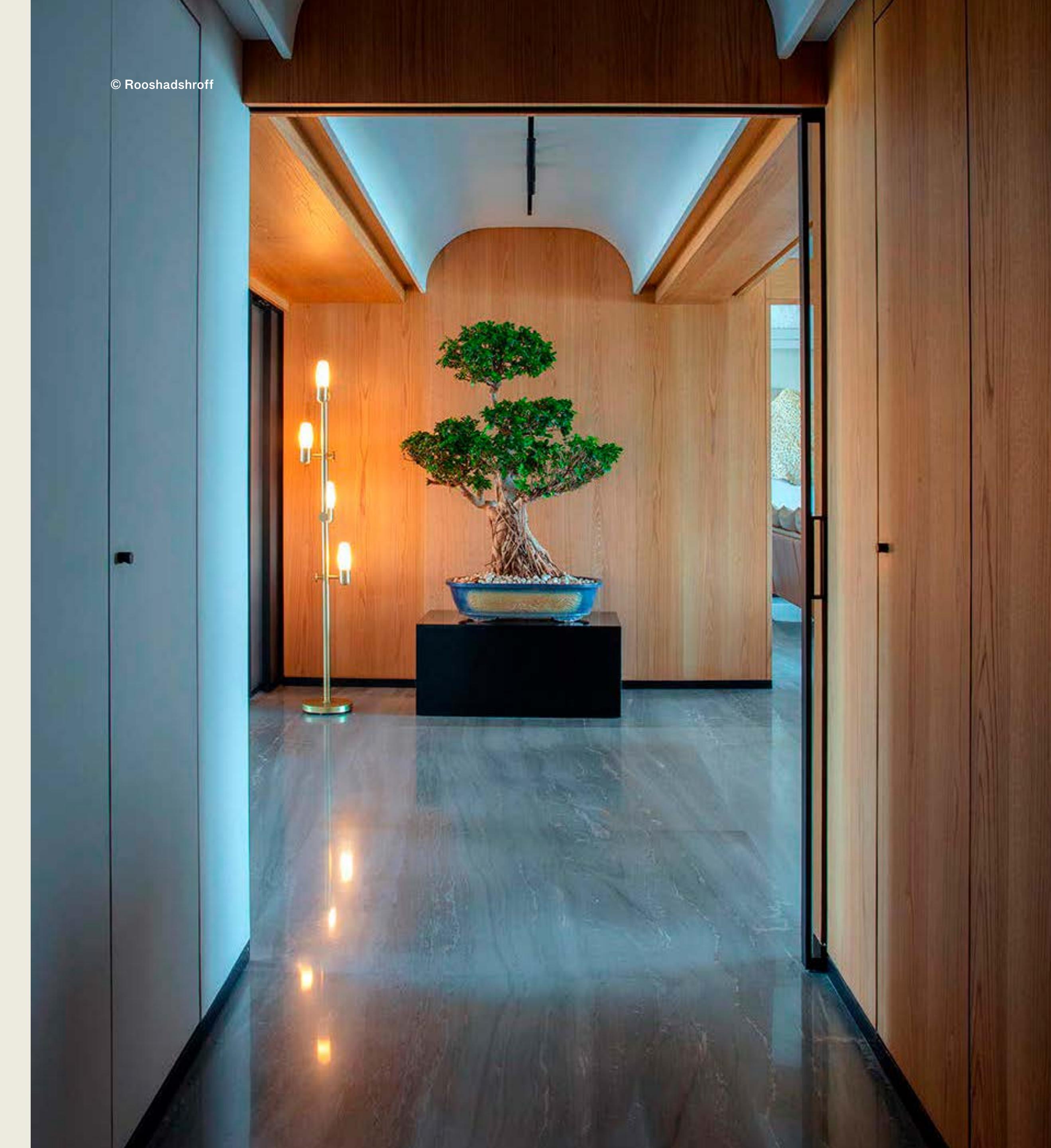
In essence, 2025 is poised to be a year of consolidation and expansion: consolidating our position within India's evolving design landscape, while expanding our reach and voice internationally.



Rooshad Shroff
Owner/Principal Designer of ROOSHADSHROFF
Mumbai, India



MAISON&OBJET

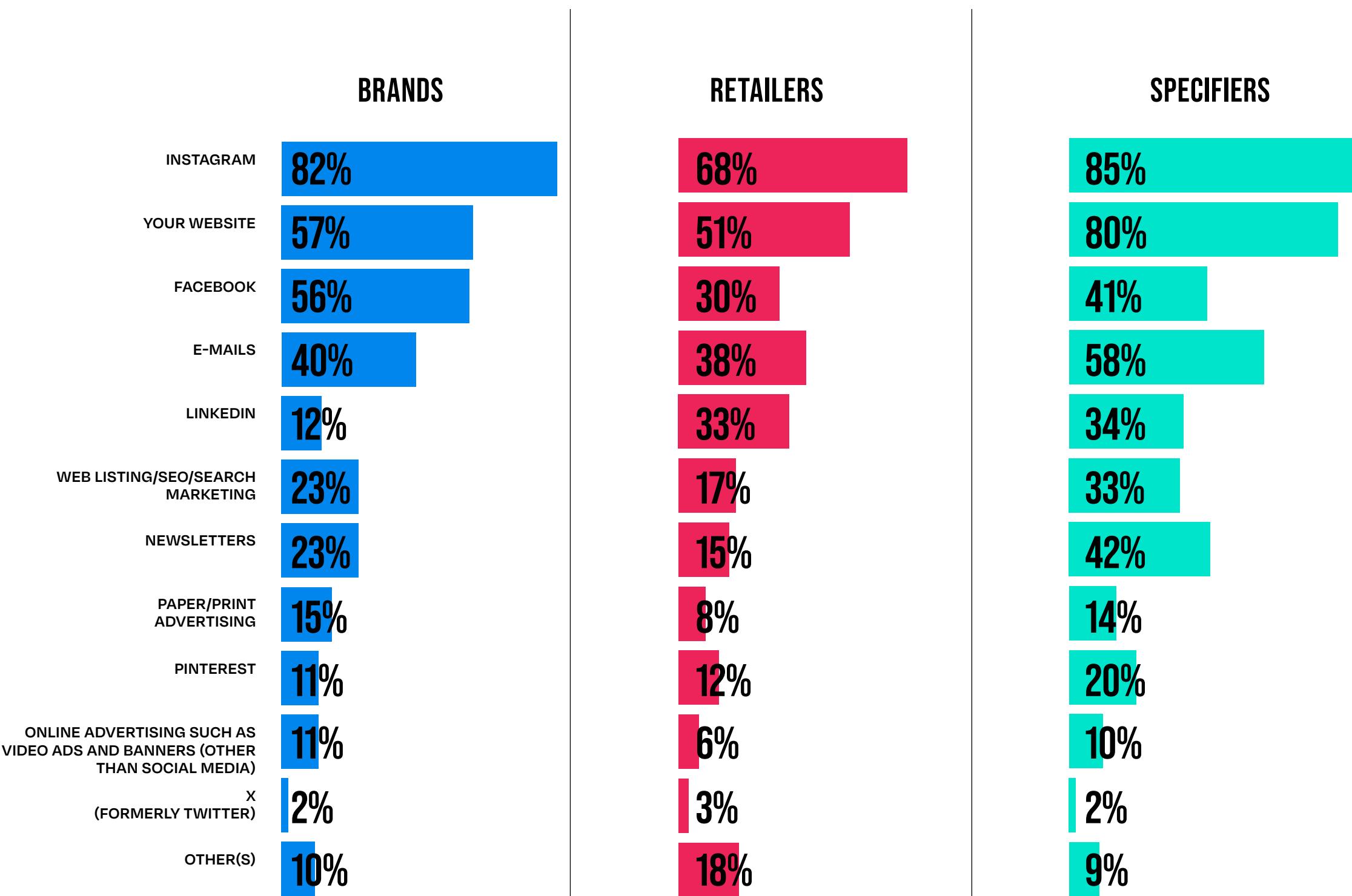


V.

A CHALLENGING ENVIRONMENT MEANS ADJUSTING WORKING METHODS

CHANNELS OF COMMUNICATION

WHAT ONLINE CHANNELS DO YOU USE TO PROMOTE AND COMMUNICATE ABOUT YOUR COMPANY?

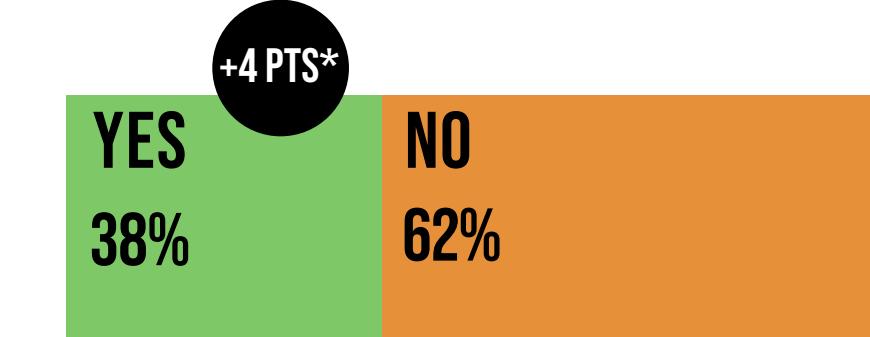
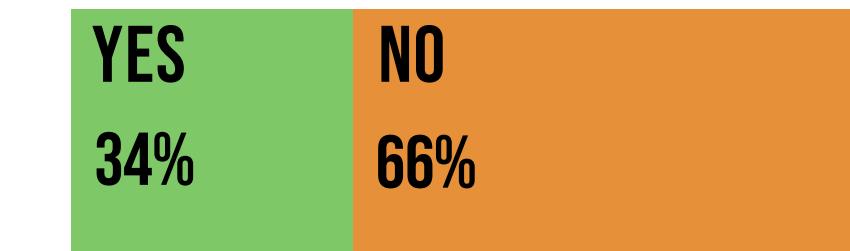


In an era of undeniable digitalization, Instagram stands out as the leading communication channel of choice.

Population: 1,183 professionals of the decor, design, and lifestyle sector surveyed between March 17 and April 4, 2025.

ARTIFICIAL INTELLIGENCE

DO YOU USE ARTIFICIAL INTELLIGENCE TOOLS FOR YOUR BUSINESS?

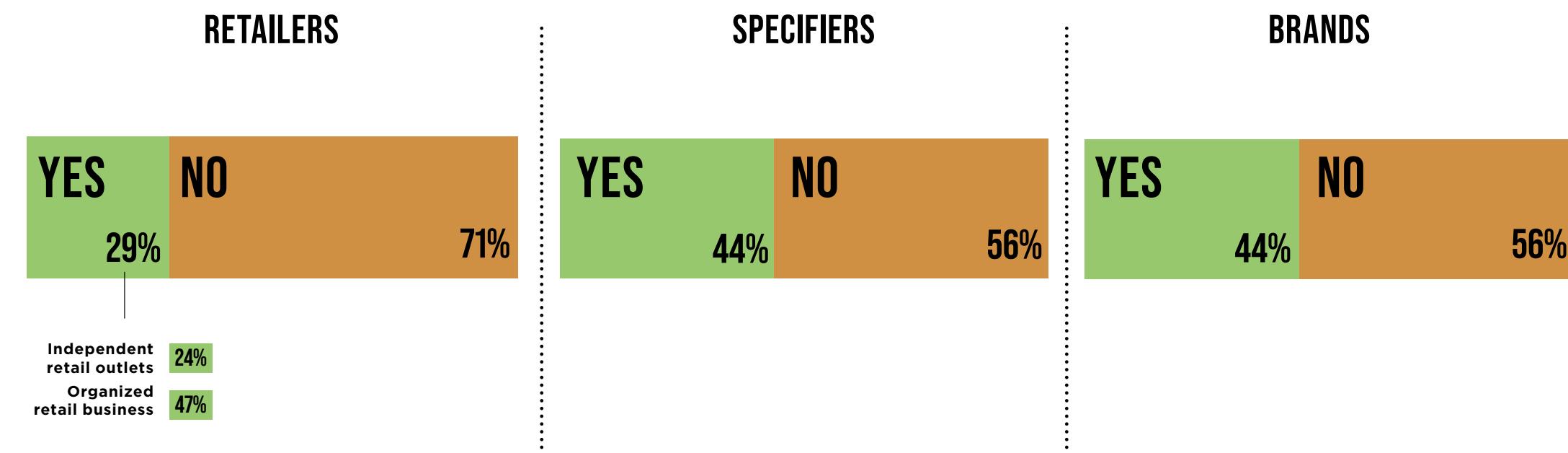


In April 2024, the Maison&Objet Barometer featured a special report on how the sector is approaching artificial intelligence. An initial overview revealed that 34% of professionals were using AI tools as part of their work.

Since then, we have continued to monitor this trend across subsequent editions. One year later, in April 2025, the proportion of users has risen to 38%, reflecting a steady and measurable integration of AI within the sector.

ARTIFICIAL INTELLIGENCE

This upward trend is particularly noticeable among specifiers: in April 2025, 44% reported using artificial intelligence, representing a 10-point increase in just one year. Architects, interior designers, and decorators had already highlighted, back in April 2024, the opportunities these new tools offer in terms of space modeling and visualization, as well as process automation.



Barometer
April 2025

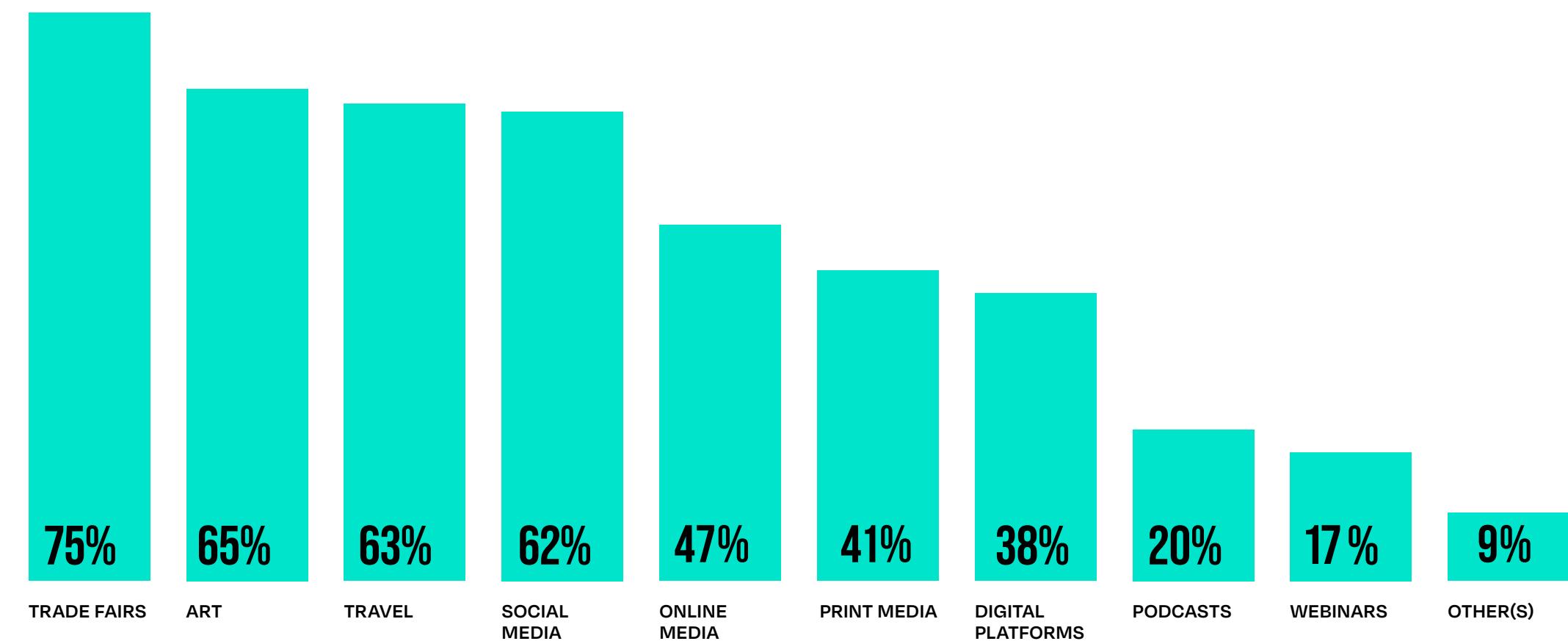
Population: 1,183 professionals of the decor, design, and lifestyle sector surveyed between March 17 and April 4, 2025.



MAISON&OBJET

SOURCES OF INSPIRATION FOR SPECIFIERS

WHERE DO YOU GET INSPIRATION FROM?



In each edition of the barometer, we ask specifiers about their sources of inspiration. Once again this year, trade shows remain a key observation ground for three-quarters of professionals in the space design sector. They also draw creative inspiration from art and travel.

Social media then serves as a research ground for 6 out of 10 specifiers. This demonstrates that, despite the growing relevance of digital tools, the need for real-life experiences and in-person encounters remains essential to the creativity of these professionals.

Specifiers: Interior designers, architects, real estate developers, landscape architects... surveyed between March 17 and April 4, 2025.

A CHALLENGING ENVIRONMENT MEANS ADJUSTING WORKING METHODS

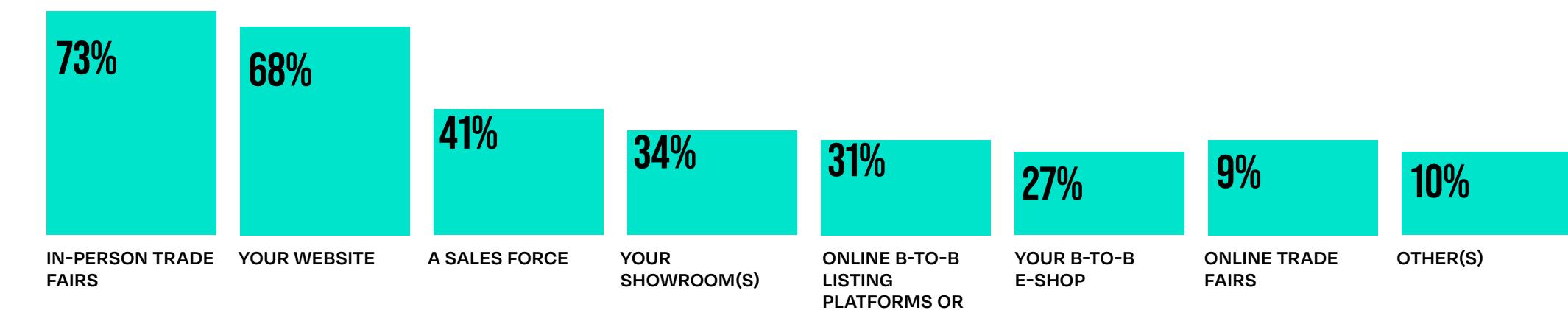
BRAND SALES CHANNELS

WHAT IS YOUR DISTRIBUTION SYSTEM?

- EXCLUSIVELY B-TO-B (TO DISTRIBUTORS/SPECIFIERS)
- B-TO-B AND B-TO-C (TO DISTRIBUTORS/SPECIFIERS, BUT ALSO DIRECTLY TO END CLIENTS)
- EXCLUSIVELY B-TO-C (DIRECTLY TO END CLIENTS)



WHICH B-TO-B SALES OR NETWORKING CHANNELS (TO DISTRIBUTORS/RESELLERS/SPECIFIERS) DO YOU USE?



WHICH B-TO-C SALES CHANNELS (TO END CLIENTS) DO YOU USE?



Barometer
April 2025

7 out of 10 surveyed brands distribute their offerings through both B2B and B2C channels. This diversification enables them to remain agile in a constantly evolving environment. In the B2B segment, trade shows continue to be a key driver for nearly three-quarters of brands. By leveraging their sales teams and showroom networks, brands capitalize on the value of human interaction while integrating digital tools: 3 out of 10 B2B brands are also active on B2B platforms or marketplaces.

On the B2C side, 63% of brands operate their own e-commerce sites to reach end consumers directly, and 40% have physical retail locations. Additionally, 3 out of 10 brands are present on marketplaces or use social media platforms with integrated sales features.

Brands: Manufacturers, designers, makers of decor, design or lifestyle products..., surveyed from March 17th to April 4th, 2025

ABOUT MAISON&OBJET

ABOUT MAISON&OBJET

Maison&Objet (SAFI, a subsidiary of Ateliers d'Art de France and RX France) has been a leader in the international decor, design, and lifestyle community since 1994.

Its trademark? Its ability to foster productive international meetings and enhance the visibility of the brands that exhibit at its trade shows and on its digital platform, as well as its singular aptitude for highlighting the trends that will set the hearts of the interior design community racing.

With two annual exhibitions and Paris Design Week in September, Maison&Objet serves as an indispensable barometer for the entire sector. Online since 2016, MOM (Maison&Objet and More) allows buyers and brands to continue their exchanges, launch new collections, and make contacts beyond physical meetings. Weekly launches of new products that captivate the interior design community provide an ongoing boost to the industry. In 2023, Maison&Objet rolled out new digital services, and MOM also became a marketplace.

On social networks, discoveries are made on a daily basis by a community of almost two million professionals active on Facebook, Instagram (+1M followers), Twitter/X, LinkedIn, Xing, WeChat and TikTok.

Maison&Objet is a catalyst that positions Paris as a major hub for international creative talent.

OUR ECOSYSTEM



2 SHOWS IN JANUARY & SEPTEMBER IN PARIS

140K B2B visitors / 50% international
5K brands/exhibitors / 60% international
200 sqm, 100 talks, 30 exclusive exhibitions

1 PATHWAY IN JANUARY IN PARIS

The top 100 most beautiful Parisian addresses for interior decor and design

1 B2B & B2C FESTIVAL IN SEPTEMBER IN PARIS

500 brands/designers
100K attendees, 10 talks

1 MUSEUM CAPSULE IN DECEMBER IN HONG KONG

15K visitors
150 brands/designers

1 NETWORK / 100 INFLUENTIAL MEMBERS

1 event in June in Paris
2 VIP dinners in Paris during Maison&Objet Paris
4 international VIP dinners (USA, Dubai, Europe, Hong Kong)
2 award ceremonies / 10 talks

1 MARKETPLACE

6K brands
65K new products available for sale
3M page views per year

ACKNOWLEDGMENTS

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FIND OUT MORE

Articles, infographics, and testimonials
explore our previous barometers:
<https://www.maison-objet.com/en/paris/maison-objet-barometer>



Next barometer coming: **october 2025**. Stay tuned.

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APRIL 2025 BAROMETER #10

MAISON & OBJET

NEW & NOW

PARIS

04-08
SEPT. 2025

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15-19
JAN. 2026

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