



BOTTEGA BRIO  
DESIGN BOLDLY

KONEKT, THING STOOLS

# '25 YEARBOOK

## MAY TRENDS REPORT

# MAY '25

As we move through May 2025, the design world is responding to the times with heart, innovation, and a return to what matters most. From rising tariffs to shifting consumer habits, change is in the air—but so is opportunity. We're seeing a renewed appreciation for **local craft** and the beauty of what's made close to home, **emotion-driven design** is showing us that objects have impact, and how the shift towards **a digital world** is picking up speed.

May 2025's trend reports tell a story of designers and buyers finding new ways to connect during volatile times: to products, to people, and to purpose.



STUDIO BINDRI BY BALQIS INDRIYANI  
ICFF WANTED LAUNCH PAD 2025





# 01



STAR TILE, ICFF 2025

## LOCAL CRAFT

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In early May, designers and consumers felt the pinch as tariffs on imported furniture, lighting, and materials sent prices climbing. Budgets got tighter, and many started exploring local options or rethinking their sourcing strategies. Even with recent tariff reductions, ongoing supply chain volatility remains.

The silver lining? This pressure gave a big boost to the movement toward locally made and sustainable design, prompting both consumers and businesses to turn to domestic and locally crafted alternatives. The one thing that remains clear during this period of uncertainty is the growing buzz around homegrown craftsmanship and local artistry.



## EVIDENCE

Consumer shifts toward authentic, sustainable, and locally sourced products have caused a rapidly rising demand for handcrafted custom furniture and handwoven textiles.

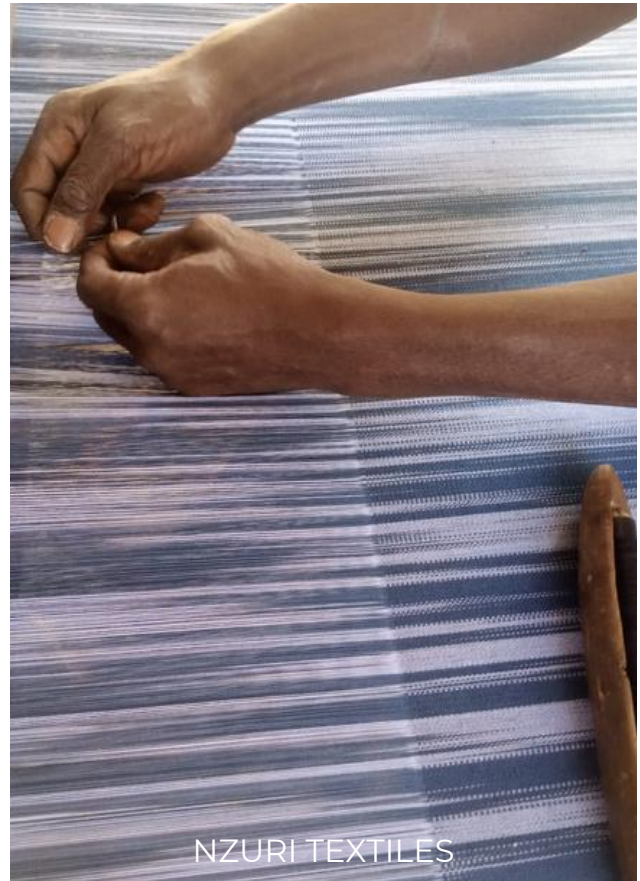


Michael Rozell, the owner and lead designer of Wooden Objex, a woodworking studio based in Granville, Ohio, says he has seen a recent surge in orders and recognition compared to past years.

## *EXPANDING ONLINE REACH*

The expansion of online platforms and digital marketplaces has enabled artisans to reach a larger audience, increasing purchase orders and the visibility of local craft. This economic opportunity is fueling further growth in the sector and reinforcing the shift away from mass production.

The global handicraft market, which includes locally made, artisanal furniture, is expected to reach USD 427.71 billion by 2025 and more than double to USD 1,160.83 billion by 2035, growing at a 10.5% CAGR.



## *A PSYCHOLOGICAL SHIFT*

Millennials and Gen Z, in particular, are driving this trend by seeking products that align with their values of sustainability and ethical production, a value shared by many local makers.



ALARA ALKAN STUDIO AT COLONY  
PHOTOGRAPHED BY REBECCA SMEYNE

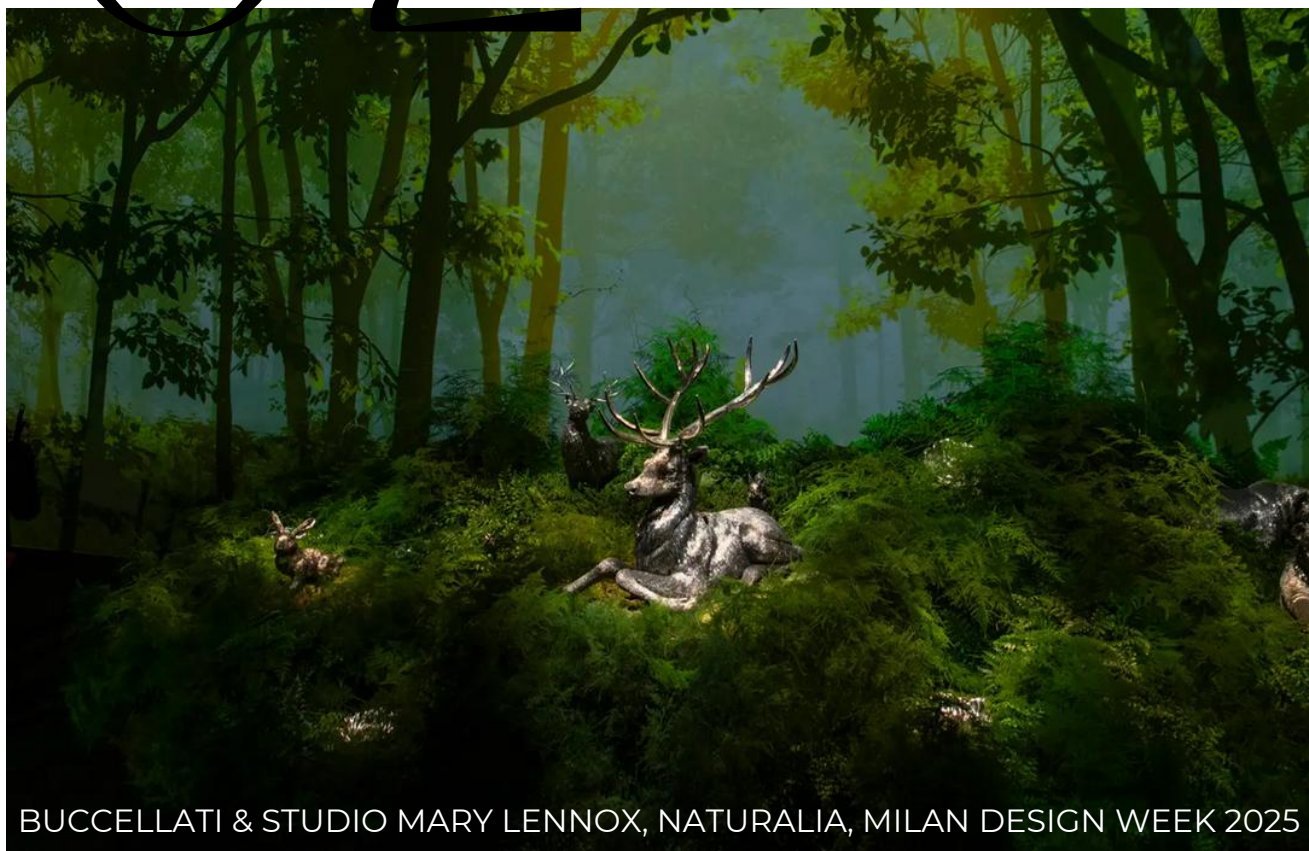




R HUGHES



# 02



BUCCELLATI & STUDIO MARY LENNOX, NATURALIA, MILAN DESIGN WEEK 2025

## EMOTION-DRIVEN DESIGN



# EMOTION- DRIVEN DESIGN

In stressful, uncertain times, we all crave experiences that feel human, uplifting, and meaningful. That's where emotion-driven design shines, turning everyday interactions into moments that stick with you.

These days, good design isn't just about how something looks or works, it's about how it makes you feel. Whether it's a sense of comfort, joy, or just feeling seen, emotion-driven design is what helps brands and spaces truly stand out in competitive markets.

## EVIDENCE

With so much competing for our attention online, it's easy to feel a bit emotionally detached. That's why pieces that offer a moment of joy, a sense of comfort, or just a little spark of excitement are so powerful, it builds trust, familiarity and a sense of connection between the artisan and end user. When that connection resonates emotionally, we're way more likely to remember and come back to it (and tell our friends about it, too).

## NURTURING LOYAL USERS & ADVOCATES



The three levels of emotional design:

- Visceral: Immediate sensory reactions, color, sound, texture that create strong first impressions.
- Behavioral: The satisfaction users feel when interacting with a product that works well and helps them achieve their goals.
- Reflective: The lasting impact and meaning users associate with a product, shaping their long-term relationship with it



## DESIGN GOES BEYOND THE VISUALS

When you tap into emotions on every level, from the “why” behind the creation to how it fits into someone’s life, you’re not just making something useful, you’re making something that truly matters.



DIEGO VELÁZQUEZ'S PORTRAIT OF HIS ENSLAVED APPRENTICE, JUAN DE PAREJA,  
INSPIRATION TO THE VENTANA MIRROR





VENTANA STANDING MIRROR, ABNER HENRY  
[CLICK HERE TO DISCOVER THE STORY](#)



# 03



## A DIGITAL WORLD



# A DIGITAL WORLD

The way we shop for furniture and design has changed, BIG TIME. As more people turn to digital platforms over traditional showrooms, the industry is witnessing a significant shift from in-person browsing to online shopping.

ICFF 2025 data shows that this isn't just a trend, but a long-term transformation. In May, we are exploring how digital innovation is transforming consumer behavior and its implications for the future of design showrooms.



## EVIDENCE

Shopping and discovering products online makes life easier. You get tons of options, the freedom to customize, and the ability to compare everything side by side, all without leaving your couch. That kind of control and clarity has built confidence in online shopping, becoming the preferred method for the next generation of consumers.

As a result, retailers and brands are responding by investing more in digital platforms and less in expansive physical footprints.

Attendance at ICFF has fallen from over 32,000 in 2015 to just over 13,000 in 2025, a decrease of nearly 60%. However, ICFF 2025 reported over 54,000 connections made through its app, suggesting that while in-person attendance is down, digital engagement is robust and growing. The significant drop in physical attendance over the past decade aligns with the broader industry shift to digital platforms for product discovery, networking, and purchasing.

## *TECHNOLOGY THAT MIMICS THE IN-STORE EXPERIENCE*

Modern visualization technology, such as 3D room planners, allow consumers to see exactly how different options will look in their unique spaces, helping them accurately assess fit, style, and scale. This addresses the longstanding barrier of not being able to "see" how a large piece will look at home.

80% of shoppers say 3D visualization increases their confidence in purchase decisions for furniture, and 83% find 3D planners very helpful in making final choices.

Advancements in 3D visualization technology have fundamentally transformed consumer behavior, making buyers far more comfortable with large digital home purchases.



ADRIANA HOYOS ONLINE 3D PLATFORM





ADRIANA HOYOS ONLINE 3D PLATFORM

# LOOKING AHEAD

Drawing on the momentum for local craft, June will reflect a broader cultural shift toward quality, connection, and conscious consumption, with several trends poised to gain traction in the design world:

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## **Revival of Traditional Techniques**

Designers and artisans are combining heritage craftsmanship with innovative design to create contemporary works that honor tradition while appealing to modern aesthetics.

## **Fusion of Art and Function**

There is a growing trend for furniture and decor to transcend pure functionality and become collectible works of art. This results in furnishings that double as conversation starters and reflect the owner's taste and values.

## **Digital Platforms Amplifying Artisans**

E-commerce platforms and digital marketing remove geographical barriers, providing access to craft, elevating the status of handmade goods, and bringing artisanal excellence into the mainstream.



HANDWOVEN LAMPSHADE MADE FROM PALMETTO LEAVES USING  
TRADITIONAL "LLATA" METHOD OF MALLORCA.



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## CONTACT US

Have a question, need advice, or dreaming of a custom piece? Let's make something extraordinary  
—contact us today!

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