



[Exporting cutlery to Europe](#)

'Practical market insights into your product'

European consumption of cutlery is substantial and the market offers many opportunities to developing country exporters. Not only changes in eating habits, but also individualisation and increased interest in handmade products, influence the consumption of cutlery. Differentiate your products to target the niche market. Options for adding value to their products include focusing on design, decoration, materials used and the product finishes.

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1 . Product description

The main cutlery items in the Western world are the knife, fork and spoon. Cutlery is used to prepare, serve and eat food. As such, cutlery is divided into two main categories: dining (flatware) and cooking (kitchen knives). Special sub-categories are cutlery for children, hobby knives, and party and picnic cutlery. Cutlery comes in sets or as individual items.

Quality

Quality cutlery does not easily tarnish or scratch, it retains its lustre, and will not (quickly) corrode. For kitchen knives, the sharpness of this kitchen tool is the specific main quality concern, besides grip. Each of the main materials used for cutlery has properties that support the enduring quality of the products.

Functionality: ergonomics, for flatware, and optimal performance, for kitchen knives, are the main

characteristics related to functionality.

Kitchen knives come in a variety of shapes and sizes. The shape of a knife makes it suitable for a particular job (such as paring, carving, boning, cleaving). Consumers can opt for a general-purpose knife or specialist knives.

Material: Traditionally, cutlery was manufactured from silver and EPNS (electroplated nickel silver). Nowadays, most cutlery, including quality designs, is made of stainless steel. Another alternative is sterling silver, which consists of nickel and copper alloy. For informal meals, picnics and party dinners, synthetic materials (such as melamine), paper or wood (bamboo) are used, which are convenient to use, washable or disposable. Kitchen knives are predominantly manufactured from carbon or stainless steel and increasingly from ceramics (zirconia).

Material and quality are closely linked:

- **Stainless steel:** with a high % of chrome for durability and protection against corrosion, and a lower % of nickel for lustre and resistance to high temperatures;
- **Silver-plated:** a mixture of copper, zinc and nickel, with a silver coating. It is corrosion-resistant but can be tarnished by sulphides, the atmosphere and certain foods, such as egg.
- **Sterling silver:** made of a high % (can be close to 93%) of pure silver, corrosion-resistant but can be tarnished by sulphides in the atmosphere and in certain foods.
- **Silver:** a soft metal that scratches easily, but with proper care it develops a beautiful sheen over time.

Durability: Stainless steel, which is the most common material used for cutlery manufacturing, needs to be tough and strain-resistant, since cutlery made from high quality metals tends to need low maintenance and has long-lasting features. Cutlery weight is also important, since heavy weight cutlery provides better handling management and durability. For kitchen knives, ceramic blades offer superior sharpness. Ceramic is much harder than steel, making it more durable and giving it a lasting nature.

Product design: In addition to superior grip and functionality, flatware and kitchen knives have to look good and appeal to the high aesthetic norms and expectations that have become accepted in dinner- and kitchenware as a whole.

Labelling

- Information on the outer packaging of cutlery should correspond to the packing list sent to the importer. External packaging labels for cutlery should include the following information:
 - Producer
 - Consignee
 - Material used
 - Quantity
 - Size
 - Volume
 - Caution signs
- EAN or Barcodes are widely used on the product label in Europe.
- Please note, your buyer will specify what information they need in terms of product labels or on the item itself (logos, 'made in...'). This forms part of the order specifications.
- Use the English language for labelling unless your buyer has indicated otherwise.

Packing and packaging

- Cutlery should be packaged in accordance with the importer's instructions. Every importer will have its own specific requirements related to the use of packaging materials, filling boxes, palletisation and the stowing of containers. Always ask for the importer's order specifications, which are part of the purchase order.
- Properly packaging cutlery can minimise the risk of damage and scratches resulting from shocks. The product's fragility determines the packaging for export. Packaging should prevent

individual items inside a box from damaging each other and the boxes themselves when they are stacked inside the container.

- Packaging must consist of easy-to-handle dimensions and weight. Standards here are often related to labour regulations at the point of destination and must be specified by the buyer. Boxes are usually palletised for air or sea transport and exporters are requested to maximise pallet space.
- For cutlery, reducing transport and transportation emissions by flat-packing the items in the container is key. Such considerations need to be part of this product group's design phase.
- With regard to packaging materials, there must be a balance between providing maximum protection and avoiding excess materials (waste removal is a cost to buyers) or shipping 'air'. Exporters can reduce the amount and diversity of packaging materials by:
 - Partitioning inside the boxes using folded cardboard,
 - Improved matching of inner boxes and outer boxes and standardising each of the sizes,
 - By considering packaging and logistical requirements already at the products' design stage,
 - Asking their buyer for alternatives.

2 . Which European markets offer opportunities for exporters of cutlery?

European imports of cutlery are growing. Developing countries are Europe's main cutlery suppliers. Europe's main importers of cutlery are:

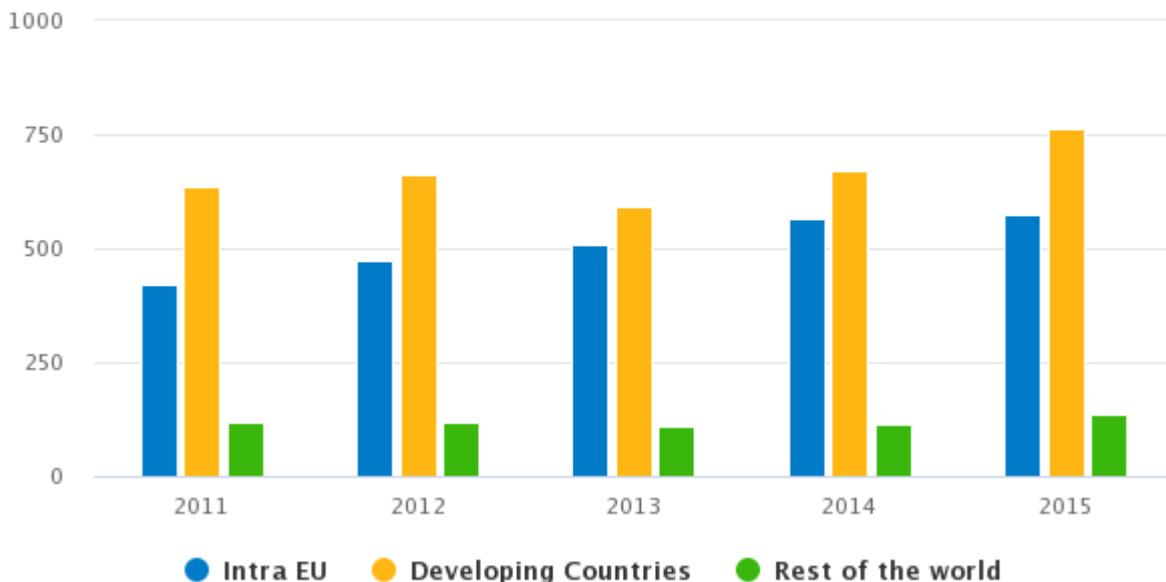
- Germany
- The United Kingdom
- France

With a strong market for developing countries, Germany and the United Kingdom are especially interesting focus countries, as is the Netherlands.

Imports

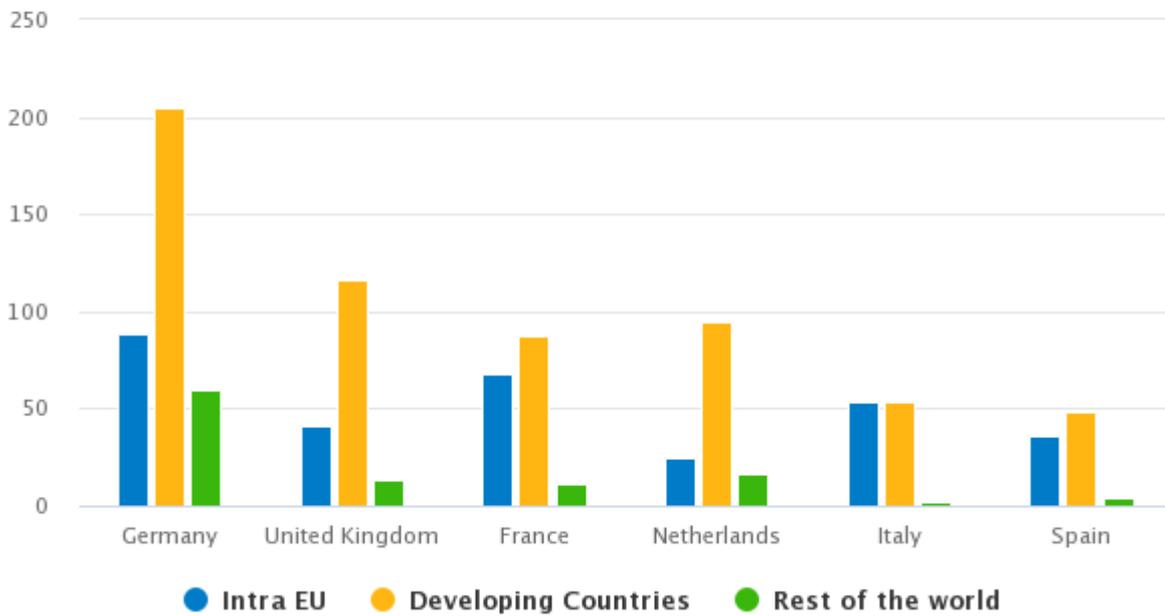
Figure 1: European imports of cutlery

By main destination



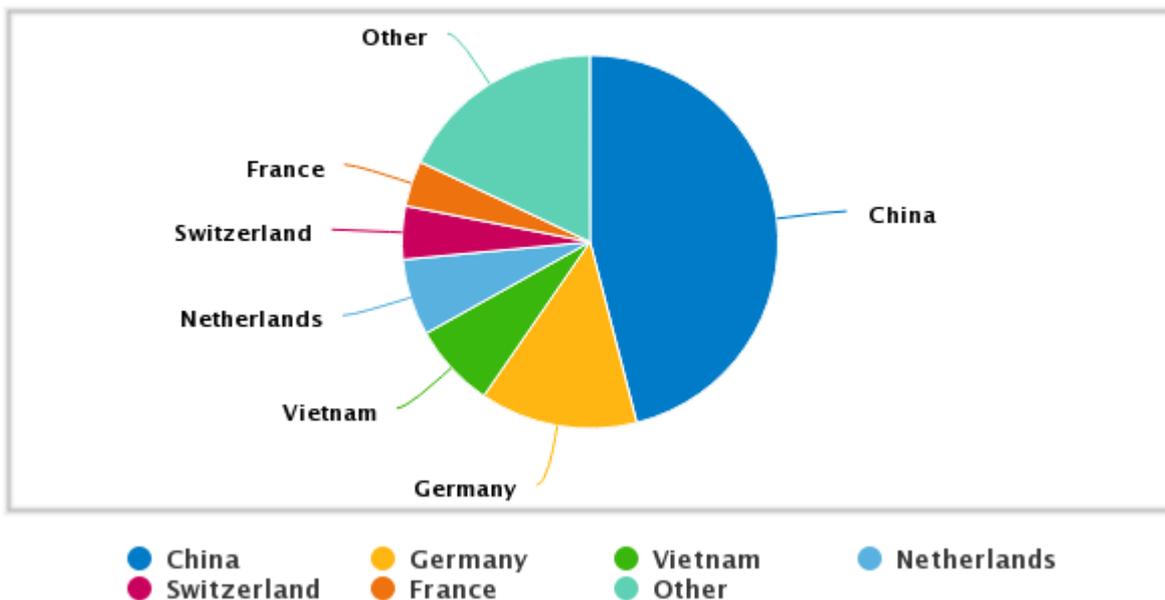
Source: Trademap

Figure 2: Main importers of cutlery 2015



Source: Trademap

Figure 3: Leading suppliers of cutlery 2015



Source: Trademap

- European cutlery imports increased from € 1.2 billion in 2011 to € 1.5 billion in 2015. The average annual growth rate was 5.8%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries are Europe's main source of cutlery. They supply 52% of European imports. This amounted to € 764 million in 2015. This share is predicted to be stable in the coming years.
- Germany is Europe's leading importer of cutlery, with € 353 million in 2015. The United Kingdom and France follow with € 170 million and € 166 million respectively.
- Germany is also leading when it comes to imports from developing countries, with € 205 million.

The United Kingdom follows with € 116 million. The Netherlands also imports a lot of cutlery from Developing Countries, at € 95 million.

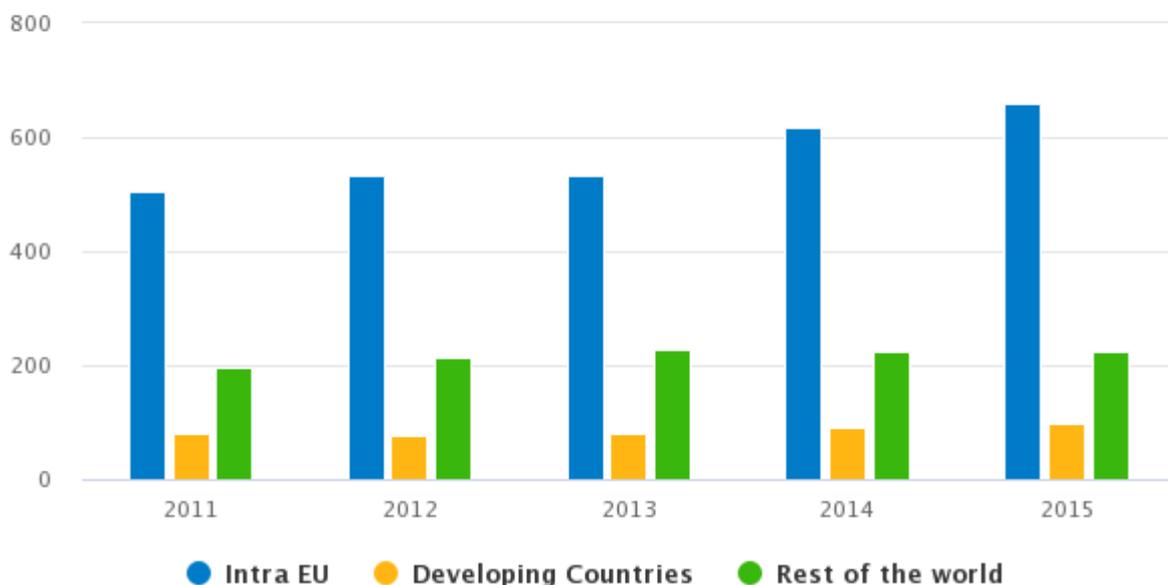
- Imports from developing countries grew strongly between 2011 and 2015, despite a slight dip in 2013. Especially in the United Kingdom and the Netherlands these imports increased considerably, with € 35 million and € 32 million respectively.
- China dominates European cutlery imports, with 46% in 2015. Another developing country that is a leading supplier is Vietnam.

Tips:

- Focus on Germany and the United Kingdom, as well as the Netherlands. Their large imports from developing countries make them especially interesting markets.
- Compare your products and company to the strong competition from China and Vietnam. You can use [ITC Trademap](#) to find exporters per country. You can compare:
 - market segment
 - price
 - quality
 - target countries

Figure 4: European exports of cutlery

By main destination



Source: Trademap

- European cutlery exports consist mainly of trade within Europe.
- Germany is by far Europe's leading cutlery exporter. With € 335 million, it accounts for more than a third of Europe's total cutlery exports. With € 122 million, the Netherlands exports another 12%. Italy and France follow with € 92 million and € 89 million respectively.

Production and consumption

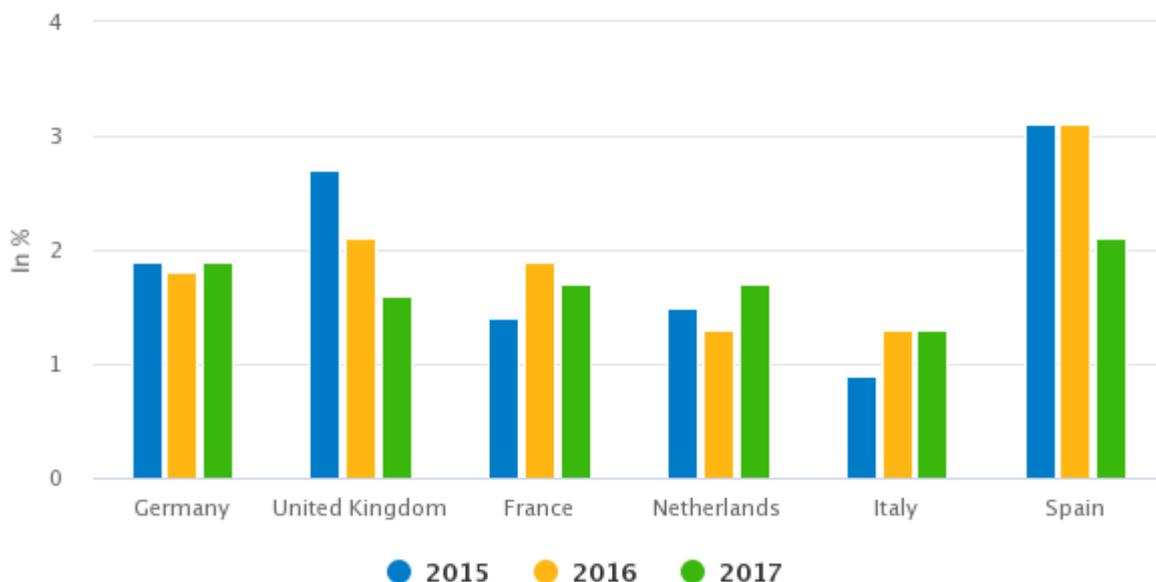
- Europe's demand for cutlery is much larger than its production. This drives the need for imports,

making Europe an interesting market.

- Since 2011, European cutlery production has been fairly stable around € 575 million.
- In the same period, European cutlery consumption increased steadily, reaching € 777 million in 2014.
- With € 207 million, Germany is responsible for 35% of European cutlery production. France and Italy follow with € 90 million and € 75 million respectively.
- European cutlery consumption is also highest in Germany, at € 177 million. France follows with € 122 million.

Figure 5: Real private consumption expenditure growth

Change from previous year



Source: Eurostat

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2015 and 2017, European private consumption expenditure is expected to increase. This means that consumption of luxury and decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on these products. Consumers in mature markets already spend a fair amount of money on luxury, so growth in their consumption will be moderate.

3. What trends offer opportunities on the European market for cutlery?

As is true with regard to trends in dinnerware, changing eating habits are also influencing the consumption of cutlery in two, almost opposing, directions. Other trends in cutlery: individualisation, handmade and brand loyalty. Refer to CBI Product Factsheet [Dinnerware in Europe](#) for more information.

Changing eating culture

Social dining

Northern European countries - which do not boast a generally-accepted culinary tradition - are increasingly developing a table culture, spreading from Southern influences such as French cuisine or the Italian food culture, or even from 'exotic' sources (such as Moroccan, Japanese). This means consumers are taking more time to sit down and enjoy dinner, making it a social event with family

and friends, and laying the table with their best flatware. The European consumer has learnt to distinguish and appreciate good cutlery and is increasingly making individual choices.

Tips:

- Invest in design. Craftsmanship is a firm basis for differentiation, for instance through the use of flowing curves or minimalist lines, natural materials in handles, imaginative decorations or colour. Fun aspects have also been used as differentiators, such as hybrid cutlery, combining the functionality of different eating implements, including the spork (spoon / fork), spife (spoon / knife), knork (knife / fork) and the sporf, which combines all three.
- Design innovation helps make cutlery distinctive and trendy. Whilst the core product remains firmly mass and industrialised, niches based on handmade, natural materials and design statements are opening up, which should be encouraging for exporters in developing countries.
- Diversify your range of flatware to include cheese and butter knives, cook's knives, palette knives, filleting knives, poultry shears and mezzalunas (curved blades with two handles for chopping herbs), coffee and teaspoons, serving spoons etc. This broad choice caters to the gourmet consumer's pride in laying the table in a luxurious manner and to be seen as having cutlery for every dish, however exotic, and for every occasion. Materials other than metal are well suited for such lines.
- A strong emotion related to the previous trend is the consumer's urge to collect, an emotion that is also seen in wall plates and decorative accessories (figurines), for instance. The amateur chef will find it hard to resist collecting the whole array of kitchen knives, whilst the gourmet consumer will go for a full set of ceramic teaspoons in all available colours. Friends and relatives are never at a loss for a present to give collectors.
- Incorporate the children's segment into your range. Children's cutlery has obvious functional characteristics related to the child's manner of eating and diet. Ergonomics are therefore a focal point, as well as health and safety aspects and durability. Children's cutlery (and dinnerware) plays an important role with mums, dads and grandparents, displaying pride in buying distinctive and fun children's flatware (with matching dinnerware). This category has moved from cutlery or tableware specialists towards more general providers of children's home accessories and toys, as well as lifestyle brands, so that the platform for marketing children's cutlery has expanded.
- Gone are the days of the 16 or 24-piece cutlery set that formed the ideal wedding gift and would last the married couple a lifetime. These days family units have changed (smaller, different compositions), as have family life (like more urban, dual income families) and taste preferences. Boxed sets are still available but the consumer is now more eclectic in their choice of cutlery and turns it round much faster under the influence of changes in taste, trends and the need for different cutlery for different occasions (such as formal and informal dining). Offer individual choice, smaller units and price differentials to cater to different consumers.

Casual dining

At the same time, there are trends that counteract bringing more quality into dining. These are, for example, increased urbanisation, the modern consumer's need for instant gratification, eagerness not to miss out on anything, multi-tasking and being online 24/7. This lifestyle has caused the rise of '*casual dining*', the trend in which consumers have abandoned the set-piece family dinner in

favour of TV dinners, casual meals (individually, not at set times and not in a set arrangement with a laid table) or eating out (at fast-food sources).

Tips:

- Research your target segment's dining culture. The 'slow food movement' and 'casual dining' each require a specific marketing mix.
 - The new foodies and masterchef segment will appreciate tableware that looks good on the table, has specialised items for exclusively fish or exotic dinners, is different and attracts attention. Consequently, this dinnerware will be slightly less price-sensitive, might be branded and will be purchased in department stores or at kitchen specialists.
 - The 'casual diners' will favour more everyday, functional dinnerware that is affordable and sourced from nearby supermarkets and convenience stores.
- Today's consumer is also an 'in-the-moment consumer': when rushed, he/she will be a 'casual dining' consumer, while during the weekend that same consumer may want to take time and turn into a 'slow diner'. This ability to cross over, may offer opportunities for exporters to market everyday as well as special-occasion dinnerware to the same consumer.
- Overall, the European emerging markets (especially Eastern Europe) have a different segmentation from the mature markets (Germany, France, the United Kingdom, the Netherlands, Belgium, Italy, Spain and Scandinavia). Emerging-market consumers have less disposable income for interior products and dinnerware, will be more price-conscious and have less experience in comparing offers from different segments (in design, functional quality and brands). Therefore, higher priced products will not attract them. For that reason, the lower segments dominate the emerging European markets, while in the mature markets different segments (low, mid and high-end) of dinnerware are found. Anticipate this in your geographical segmentation.

Masterchef: displaying and sharing cooking skills

A related trend is the European consumer's rediscovered joy in cooking and showing off one's cooking skills. This increased popularity in home cooking combines several trends. A renewed interest in nutrition and health with the related preference for cooking a fresh meal on the spot using fresh ingredients. This is also stimulated by the '*slow food movement*' with its emphasis on being conscious of what you eat, in sourcing food locally and respecting local food cultures. What's more, acquiring (and sharing) skills is seen as a new, non-material luxury in Western society. This new 'foodie' and 'masterchef' requires some tools for food preparation, which will support his newly acquired status as a 'chef'. This professional amateur in the home kitchen is developing his technical skills with the knife as well as the awareness of which cutting tool to use when tackling which piece of food. As such, he will build up a demand for a larger set of specialised kitchen knives.

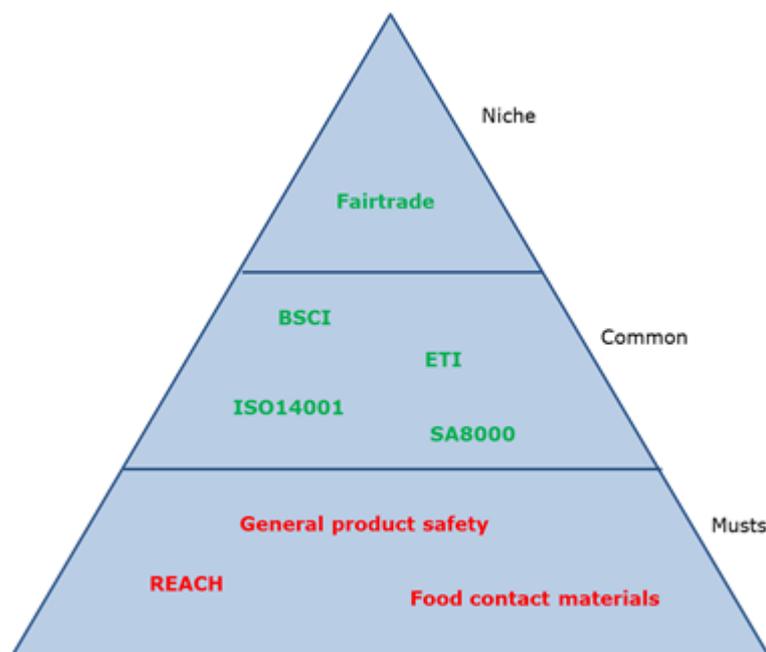
Tips:

- Offer kitchen knives for the starter as well as for the more advanced home chef, from a few basics for everyday use to specialist knives like the paring knife, bread knife, carving knife etc. Study food preparation to understand the exact functions and requirements for each type of knife. Clearly communicate the knife's features.

- Support the gift nature of this status-related hobby by offering packaging in the form of wooden boxes, matching knife blocks and sharpening tools.
- With regard to kitchen knives in particular, branding has a strong influence on buying behaviour. Especially European brands with a heritage, such as Zwilling (Germany), or European areas with a tradition in professional knives (such as Solingen, Laguiole or Sheffield) are hard to beat in terms of customer loyalty and trust. Any new contenders will need to distinguish themselves by using superior consumer knowledge, new insights into user moments or functions, or gift value.

4 . What requirements should cutlery comply with in order to be allowed on the European market?

Figure 6: Buyer requirements for cutlery



5 . Legal requirements

General product safety: the [General Product Safety Directive \(GPSD\)](#) applies to all consumer products. It states that all products marketed in the European Union should be safe to use and forms a framework for all specific legislation on specific products and issues.

Tips:

- Study the specific legal requirements listed but also use your common sense to ensure the product does not cause any danger in its normal use. Most buyers will require the developing country exporter to provide proof of compliance with legal requirements. You can read more about the [General Product Safety Directive in the EU Export Helpdesk](#).
- For a full overview of legislative requirements for cutlery, please consult the [EU Export Helpdesk](#).
- Check the rapid alert system for non-food dangerous products ([RAPEX](#)), a database that

provides information about safety risks related to consumer products notified by European countries and the measures taken to alleviate these risks.

Food contact materials: Food safety is a major concern in Europe and safety measures go further than the food itself, covering dishes and packaging that come into direct contact with food. As products that do not fulfil these requirements are regularly withdrawn from the market, you need to make sure that your products meet these requirements.

Tips:

- For more information, please refer to the [EU Export Helpdesk on health control of articles in contact with food products](#). Make sure that you meet all the requirements regarding dangerous substances and labelling.
- For more information on buyer requirements for cutlery please refer to the [CBI Buyer requirements for Home Decoration and Home Textiles](#).

6 . Additional requirements

Sustainability: Social and environmental sustainability offer ways for companies to differentiate their products on the European market. Opportunities range from sustainable raw materials, production, certification and the use of labels (see Niche requirements). Buyers are increasingly demanding the following certification schemes:

- The [Business Social Compliance Initiative \(BSCI\)](#) has been developed by European retailers to improve social conditions in sourcing countries. Suppliers of BSCI participants are expected to comply with the BSCI Code of Conduct, which can be proved with an audit at the importer's request.
- The [Ethical Trading Initiative \(ETI\)](#) is a code of conduct developed to improve the working lives of people across the globe that make or grow consumer goods. ETI is particularly common in the United Kingdom.
- Standards such as [ISO 14001](#) and [SA 8000](#) can be used to meet buyer demands for sustainability. However, compliance with these specific standards will only be demanded in niche markets.

Tips:

- You can expect compliance with the BSCI and ETI Codes of Conduct to be considered a basic requirement as an increasing number of European importers are participating.
- Look into the possibilities for improving your sustainability performance. Even if immediate compliance with certification is beyond your scope, familiarising yourself with issues included in these certification schemes will give you an idea of what to focus in terms of sustainability.
- For more information on sustainability, please refer to [CBI Trend Special Sustainability in the Home Sector](#).

7 . Niche requirements

Fairtrade products: Among the niche initiatives, the 'fair trade' concept, which supports fair pricing and improved social conditions for producers and their communities, is the best-known scheme, with a relatively large market presence (across various sectors). Forms of fair trade certification are available from bodies such as: the [World Fair Trade Organisation](#) (WFTO), [Fairtrade International](#) or IMO [Fair For Life](#).

Tips:

- Ask buyers what they are looking for and possibly try and establish collaboration with a company in the fair trade segment to use the story behind the product for marketing purposes.
- Please refer to the [ITC Standards map database](#) for more information on different voluntary standards and their requirements, including fair production.

8 . What competition do I face on the European cutlery market?

Please refer to [CBI Home Decoration Field of Competition](#), as the competitive field for cutlery does not differ significantly from this general overview.

9 . Through which channels can you get cutlery on the European market?

As market channels and segments for cutlery do not differ significantly from the home decoration sector, please refer to [CBI Market Channels and Segments for Home Decoration](#) for a general overview.

Market channels

All major retailers and department stores in Europe have online business-to-consumer platforms.

Tips:

- Consider targeting online retailers, in order to reach a broader range of customers. This means, however, supplying small batches/individually packaged items, being prepared to pre-stock and offer more just-in-time supply concepts. Since e-commerce is expected to grow considerably over the next few years, this strategy offers exporters the possibility of scaling up in a short space of time. This is increasingly the case, as brick-and-mortar retailers (companies that have a physical presence and offer face-to-face customer experiences) are rapidly adopting multi-channel marketing strategies, including e-commerce and m-commerce. For more information refer to [CBI Trend Special E-Commerce in the Home Sector](#).
- Cutlery is available at different levels in the market, from high to low (see 'Market Segments') and various intermediate positions. Each position has its own marketing mix, a cocktail of product features and price elements with a corresponding communication strategy and the right choice of distributor. If you have your own 4Ps in focus, sourcing and connecting to distributors will be more effective.

Market segments

The cutlery market segments in flatware comprise a low, mid and high-end market. The kitchen knives segment has a much less pronounced mid-market, and an established top end.

While, in terms of volume, the lower segments are the largest, most opportunities can currently be found in the higher segments. The characteristics of each segment for the flatware category are:

- Low-end market: inexpensive cutlery made of stainless steel with limited design value, easy to clean. Intensive distribution such as through interior stores, supermarkets, convenience stores and on-line.
- Mid-end market: Products are trendier, especially through the use of decorative handles but shapes are generally unadventurous. Accessible pricing, in small sets. Mainly sold at general interior stores and mid-segment department stores.
- High-end/premium market: Designer cutlery, from brands with heritage or luxury status. Available from brand stores, department stores and online.

Besides the consumer market, the hospitality market (hotels, catering) forms a specific segment, esp. for the kitchen knives category. It is dominated by well-known brands. Key features here include durability, optimal functionality and price.

10 . What are the end market prices for cutlery?

Table 1: Indicative consumer prices of cutlery

Cutlery	Low-end	Middle	High-end
Tableware 24-piece set	€ 10-30	€ 40-80	€ 150 or more
Kitchen knife	€ 20-30	€ 30-60	€120 or more

Prices of cutlery corresponding to the low, middle and high positions are provided in Table 2. Please be aware that these prices are indicative.

Tips:

- Pricing is determined by the value perception of your product in the chosen segment (see 'Market segments'). Once you have chosen your target segment, you must offer what is expected in the segment in terms of the quality of your cutlery, at a price that matches similar products. To determine your price, study the range of consumer prices in your target segment and adjust your cost accordingly.

Consumer prices depend on the value perception of the consumer in a particular segment. This is influenced by the marketing mix: product benefits, promotion (brand or not, communication of product benefits), points of sale (reseller positioning) and a corresponding price.

Tips:

- Understand your segment and offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

The following figure gives an indication of a price breakdown for cutlery in the supply chain, which will not differ essentially from cutlery in general.

Figure 7 : Indicative price breakdown for cutlery, markups in %



Source: [ProFound](#), 2014

Useful sources

- [ICC](#), chamber of commerce for international trade and business

Trade fairs

Visiting and more importantly participating in trade fairs is highly recommended as one of the most efficient methods for testing market receptivity, obtaining market information and finding prospective business partners. The most relevant trade fairs in Europe for exporters of cutlery are:

- [Maison et Objet](#), every January and September in Paris, France
- [Ambiente](#), February in Frankfurt, Germany
- [Tendence](#), August in Frankfurt, Germany

Annex I: Classification of cutlery

- Harmonised System (HS): the following HS codes are used for trade in cutlery within Europe:
- 8211.1000: Sets of assorted articles of knives of heading no. 8211; sets in which there is a higher number of knives of heading no. 8211 than of any other article
- 8211.9130: Table knives with handle and fixed blade of stainless steel
- 8211.9180: Table knives with fixed blade, of base metal (excl. handles and blade of stainless steel and excl. butter knives and fish knives)
- 8211.9200: Knives with fixed blades of base metal, incl. handles (excl. straw knives, machetes, knives and cutting blades for machines or mechanical appliances, table knives, fish knives, butter knives, razors and razor blades and knives of heading no. 8214)
- 8211.9300: Knives with blades other than fixed blades, of base metal, incl. handles (excl. Razors)
- 8215.1020: Sets of spoons, forks or other articles of heading 8215, which may also contain up to an equivalent number of knives, of base metal, containing only articles plated with precious metal
- 8215.1030: Sets of spoons, forks or other articles of heading 8215, which may also contain up to an equivalent number of knives, of stainless steel, containing at least one article plated with precious metal
- 8215.1080: Sets of spoons, forks or other articles of heading 8215, which may also contain up to an equivalent number of knives, of base metal other than stainless steel, containing at least one article plated with precious metal
- 8215.2010: Sets of spoons, forks or other articles of heading no. 8215, incl. those with up to an equal number of knives, of stainless steel, containing no articles plated with precious metal
- 8215.2090: Sets of spoons, forks or other articles of heading no. 8215, incl. those with up to an equal number of knives, of base metals other than stainless steel, containing no articles plated with precious metal

- 8215.9100: Spoons, forks, ladles, skimmers, cake servers, fish knives, butter knives, sugar tongs and similar kitchen or tableware of base metal, plated with precious metal (excl. sets of articles such as lobster cutters and poultry shears)
- 8215.9910: Spoons, forks, ladles, skimmers, cake servers, fish knives, butter knives, sugar tongs and similar kitchen or tableware of stainless steel, not plated with precious metal (excl. sets of articles such as lobster cutters and poultry shears)
- 8215.9990: Spoons, forks, ladles, skimmers, cake servers, fish knives, butter knives, sugar tongs and similar kitchen or tableware of base metals other than stainless steel, not plated with precious metal (excl. sets of articles such as lobster cutters and poultry shears)
- Prodcom: the following Prodcom codes are used to indicate European cutlery production:
 - 2571.1145: Knives with fixed blades of base metal including pruning knives (excluding fish, butter/ table knives with fixed blades, knives and cutting blades for machines/mechanical appliances)
 - 2571.1115: Table knives (excluding fish knives and butter knives) with stainless steel handles
 - 2571.1175: Knives/cutting blades, with handles of base metal, blades for knives including pruning knives excluding fish and butter knives, knives/cutting blades for machines or mechanical appliances
 - 2571.1130: Table knives (excluding fish knives and butter knives) with handles other than stainless steel (silver, gold or platinum plated, of wood, plastic etc.)
 - 2571.1190: Scissors, tailors' shears and similar shears, and their blades (including scissor blades)
 - 2571.1160: Clasp knives
 - 2571.1480: Table flatware (excluding table knives, including fish knives and butter knives) and similar tableware of base metal, silver, gold or platinum plated

Please review our [market information disclaimer](#).