



[Exporting dinnerware to Europe](#)

European consumption of dinnerware is recovering strongly from a dip in 2013. Imports of dinnerware from developing countries are also increasing again. This offers good opportunities, especially in the upper-mid to high-end market segments. Interior stores, department stores and brand stores are promising market channels for these segments. To add value to your products, focus on user moments, craftsmanship and storytelling, based on an analysis of end-consumer needs.

Contents of this page

1. [Product description](#)
2. [Which European markets offer opportunities for exporters of ceramic dinnerware?](#)
3. [Which trends offer opportunities on the European market for ceramic dinnerware?](#)
4. [With which requirements should ceramic dinnerware comply to be allowed on the European market?](#)
5. [What competition will you be facing on the European ceramic dinnerware market?](#)
6. [Which channels can you use to put ceramic dinnerware on the European market?](#)
7. [What are the end-market prices for ceramic dinnerware?](#)

1 . Product description

Dinnerware usually consists of:

- mugs & cups
- plates & platters
- bowls
- jugs
- tea & coffee services
- other accessories, such as cake stands or sauceboats.

It can be sold as complete sets of 12 to 16 pieces, or individually. Besides the consumer market, the hospitality market (hotels, catering) is a specific segment. Well-known brands dominate this market.

This study focuses on ceramic dinnerware. Many developing countries have a long tradition in processing ceramics. This gives them a competitive advantage in the trade in these products. This study uses the following codes to indicate trade in these products:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
------------------------	---------	-------------

6911.1000	2341.1130	Tableware and kitchenware, of porcelain or china (excluding ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packaging of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)
6912.0010	2341.1210	Tableware, kitchenware, other household articles and toilet articles, of common pottery (excluding statuettes and other ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packaging of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)
6912.0030	2341.1230	Tableware, kitchenware, other household articles and toilet articles, of stoneware (excluding baths, bidets, sinks and similar sanitary fixtures, statuettes and other ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packaging of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)
6912.0050	2341.1250	Tableware, kitchenware, other household articles and toilet articles, of earthenware or fine pottery (excluding baths, bidets, sinks and similar sanitary fixtures, statuettes and other ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packaging of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)

Quality

Functionality

The type of dinnerware pieces displayed on the table depends on the:

- type of meal (for instance breakfast or cooked dinner)
- occasion (formal or informal dining)
- location (inside or outside, home or restaurant)
- culture (such as the British 'oversized' tea mug or Italian extended meal courses).

Durability

Consumers use their dinnerware frequently, making the sturdiness of the material critical. Durability relates to the material's ability to resist scratching, chipping and breaking when dropped. The materials must be dishwasher-proof, microwave-proof and refrigerator-proof.

The hospitality sector uses its dinnerware intensively. Professional kitchens may also handle dinnerware quite roughly. This places a much greater demand on durability. In this market, high-fired dinnerware (bone china, porcelain or special compositions) is preferred. Where durability is less of an issue (picnic, party), disposable materials or synthetics (e.g. melamine) are an option.

Material

The main materials used are stoneware, porcelain and bone china, which refers to material composition and firing temperatures. Each material has a different effect on the toughness, strength and translucence of the dinnerware piece.

Design

As the demand for more expressive tableware rises (see the 'Trends' section), individuality and the aesthetic quality of dinnerware have become a more important buying motive for consumers.

Design value is mostly added through shape, colour and decoration.

Consumer packaging

Consumer packaging can be a way to add value to the offer and to communicate the buyer's brand. Discuss requirements and options with your buyer.

Labelling

- Information on the outer packaging of ceramic dinnerware should correspond to the packing list sent to the importer.
- External packaging labels for ceramic dinnerware should include the:
 - producer
 - consignee
 - material used
 - quantity
 - size
 - volume
 - caution signs.
- EAN or barcodes on the product label are common in Europe.
- Your buyer will specify what information they need on the product labels or on the item itself. For instance logos or 'Made in ...' information. This is part of the order specifications.
- Use English for labelling, unless your buyer indicates otherwise.

Packaging

Importer specification

You should pack ceramic dinnerware according to the importer's instructions. They have their own specific requirements for:

- the use of packaging materials
- filling boxes
- the use of pallets
- stowing containers.

Always ask for the importer's order specifications. These are part of the purchase order.

Damage prevention

Properly packaging ceramic dinnerware minimises the risk of damage caused by transport. How an item is packaged for export depends on how easily it can be damaged. Packaging should ensure the items inside a cardboard box cannot damage each other. It should also prevent damage to the boxes when they are stacked inside a container.

Packaging therefore usually consists of inner and outer cardboard boxes. The inner boxes are filled with materials to protect the products. For instance bubble wrap or paper, depending on the buyer.

Dimensions and weight

Packaging must be of easy-to-handle dimensions and weight. Standards are often related to labour regulations at the point of destination. The buyer must specify them.

Boxes are usually palletised for air or sea transport. Exporters have to make maximum use of pallet space.

Cost reduction

Packaging has to provide maximum protection. However, you also have to avoid using excess materials or shipping 'air'. Waste removal is a cost to buyers. You can reduce the amount and diversity of packing materials by:

- partitioning inside the boxes, using folded cardboard
- matching inner and outer boxes by using standard sizes

- considering packing and logistical requirements when designing your products
- asking the buyer for alternatives.

2 . Which European markets offer opportunities for exporters of ceramic dinnerware?

European imports of ceramic dinnerware have recovered strongly from a dip in 2013. Developing Countries are Europe's main ceramic dinnerware suppliers. Europe's main importers of ceramic dinnerware are:

- Germany
- the United Kingdom
- France.

Especially the United Kingdom is an interesting focus country, with a strong market for developing countries.

Trade statistics

(!) This data covers ceramic tableware, kitchenware, other household articles and toilet articles.

Where is consumer demand?

- Europe's demand for dinnerware is considerably higher than its production. This drives the need for imports, making Europe an interesting market.
- Like the imports, European consumption of dinnerware is recovering from a dip in 2013. They recovered with 12.1% growth to €1.8 billion in imports in 2014.
- European consumption of dinnerware is highest in Germany at €419 million. The United Kingdom follows at €370 million and France at €237 million.

What is the role of European production in supplying European demand?

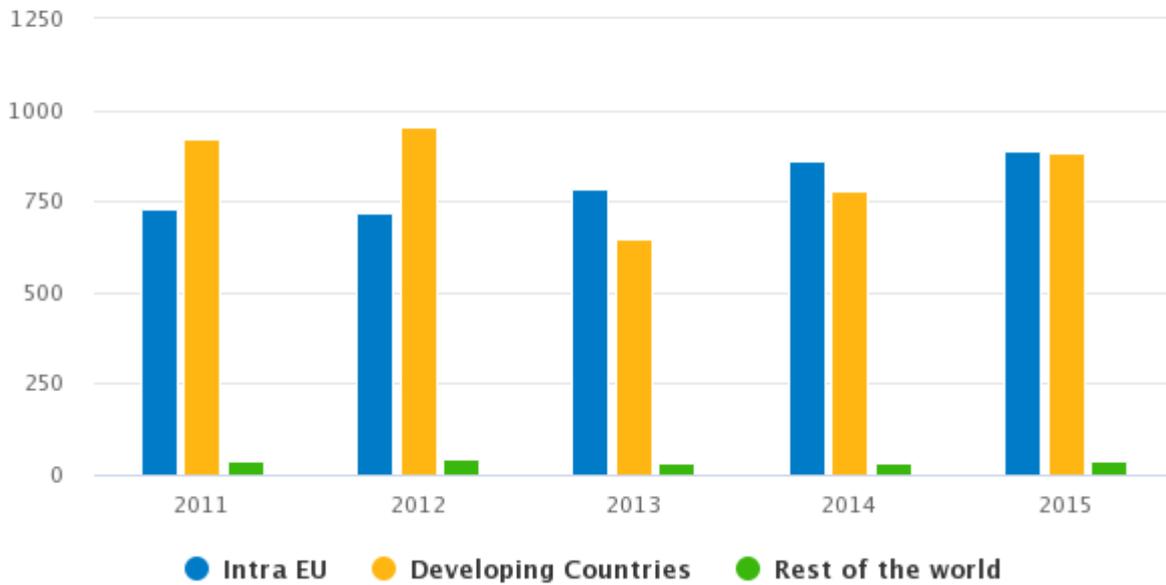
- European production of dinnerware increased from €1.4 billion in 2010 to €1.6 billion in 2014. This resulted in an average annual growth rate of 2.4%.
- Germany, the United Kingdom and Portugal are responsible for 31%, 22% and 14% of European dinnerware production respectively.

Which countries are most interesting in terms of imports from developing countries?

Note that the following data only give an indication of trade in ceramic dinnerware. No specific trade data are available. The figures below cover ceramic tableware, kitchenware, other household articles and toilet articles.

Figure 1: European imports of dinnerware

By main destination



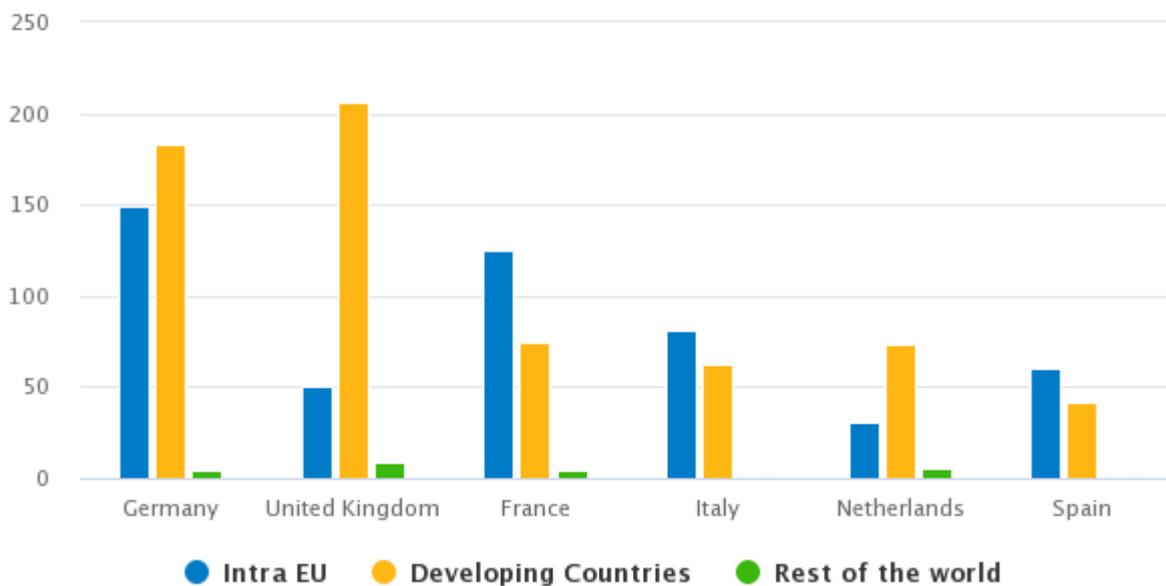
Source: Trademap

Source: Trademap

* This figure covers ceramic tableware, kitchenware, other household articles and toilet articles.

Figure 2: Main importers of dinnerware

2015

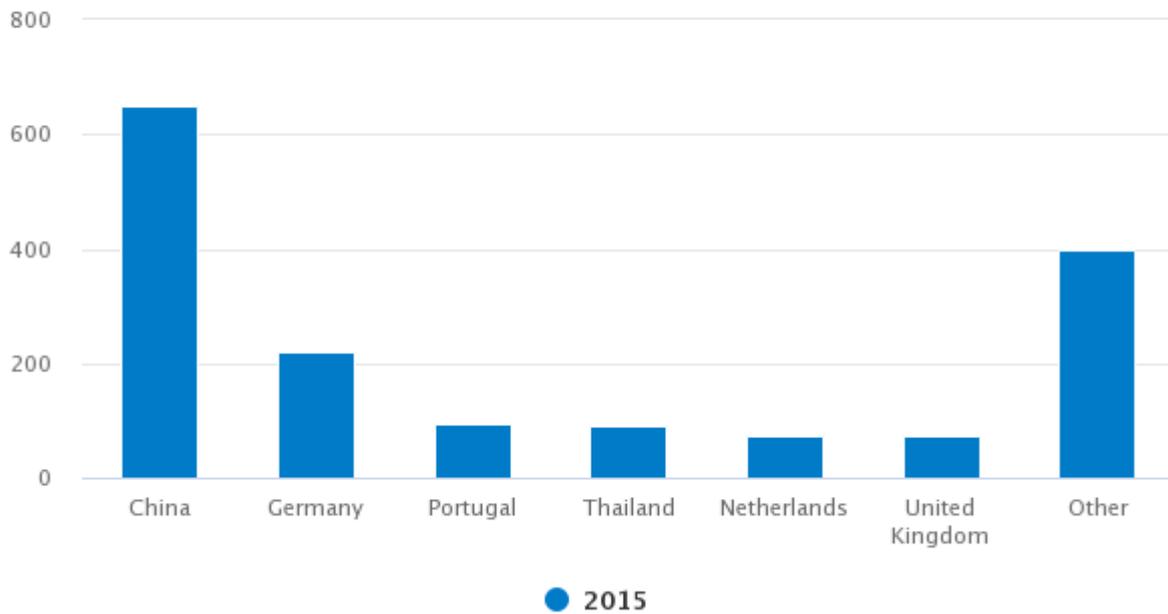


Source: Trademap

Source: Trademap

* This figure covers ceramic tableware, kitchenware, other household articles and toilet articles.

Figure 3: Leading suppliers of dinnerware, in € millions



Source: Trademap

Source: Trademap

* This figure covers ceramic tableware, kitchenware, other household articles and toilet articles.

- In 2014 and 2015, European imports of dinnerware recovered strongly from a dip in 2013. They reached €1.8 billion in 2015. This resulted in an average annual growth rate of 1.7% between 2011 and 2015.
- In the coming years, European imports are expected to keep growing moderately.
- Until 2012, developing countries were Europe's main source of dinnerware. In 2013, a sharp decrease in imports from developing countries resulted in a market share of 'just' 44%. After this dip, imports from developing countries recovered strongly and in 2015 their share was back at 49%. This amounted to €880 million. In the coming years, developing countries are expected to reclaim their position as Europe's main suppliers of dinnerware.
- Germany is Europe's leading importer of dinnerware, with €336 million in imports in 2015. The United Kingdom (€265 million) and France (€204 million) follow.
- When it comes to imports from developing countries, the United Kingdom leads with €206 million in imports. This is no less than 78% of their total dinnerware imports.
- In the United Kingdom, imports from developing countries grew strongly by €17 million between 2011 and 2015. In Germany and France, however, these imports decreased considerably, by €15 million and €22 million respectively.
- China dominates European dinnerware imports, with 41% in 2015. Other leading suppliers from developing countries are Thailand, Turkey and Indonesia.

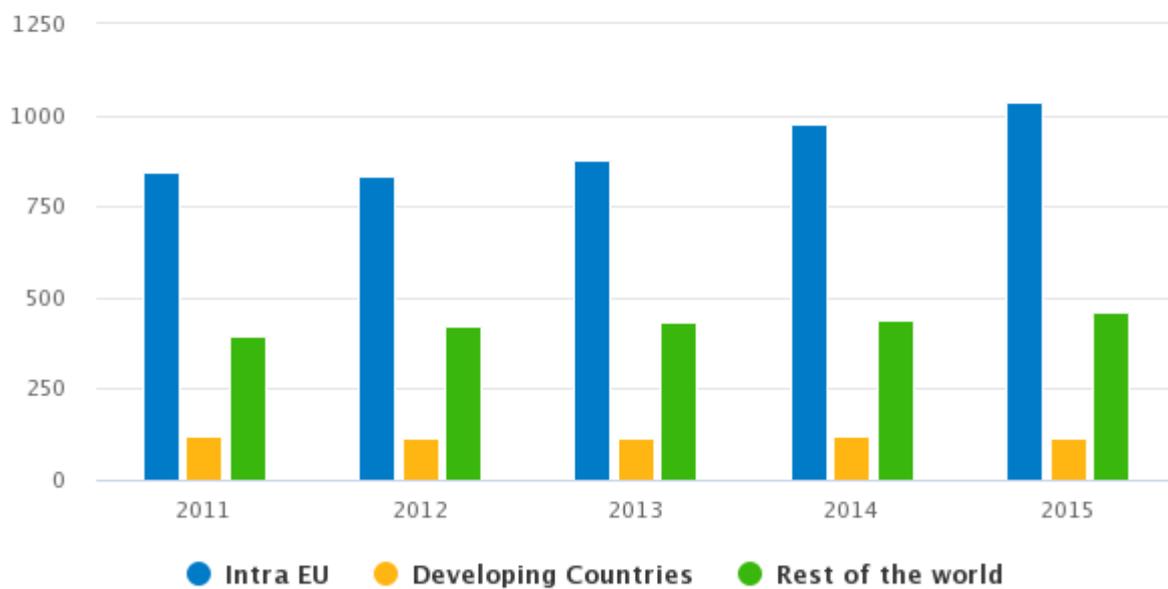
Tips

- Focus on Germany, the United Kingdom and France. Its strong imports from developing countries make the United Kingdom an especially interesting market.
- Compare your products and company to the strong competition from China, as well as Thailand, Turkey and Indonesia. You can use [ITC Trademap](#) to find exporters per country. You can compare by:
 - market segment
 - price

- quality
- target countries.

What role does export play in supplying European demand?

Figure 4: European exports of dinnerware
By main destination



Source: Trademap

* This figure covers ceramic tableware, kitchenware, other household articles and toilet articles.

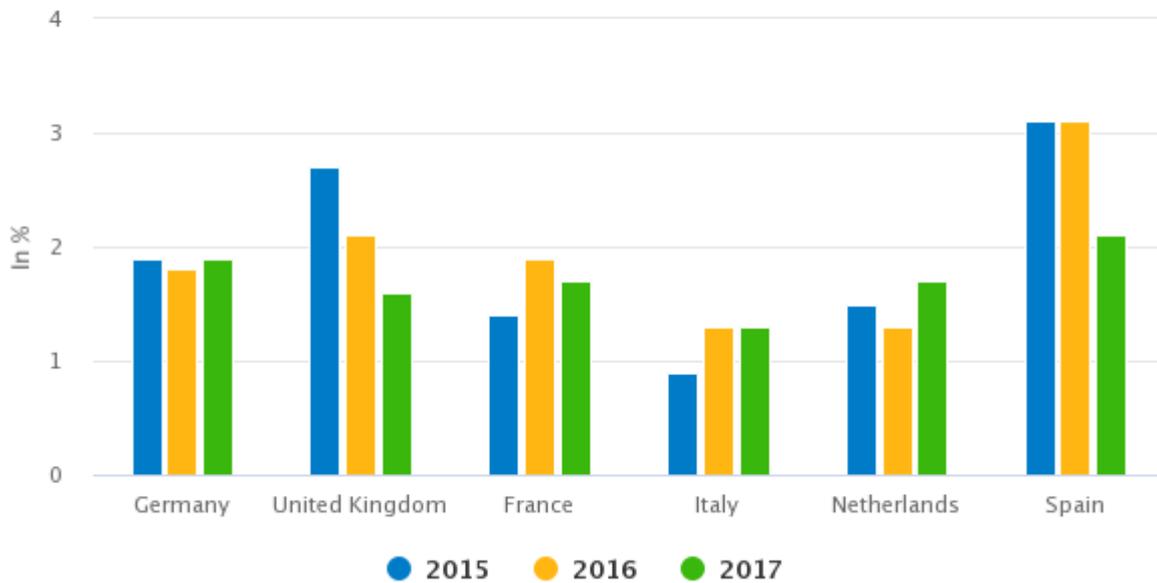
- European exports of dinnerware mainly regard trade within Europe.
- Germany (€373 million), the United Kingdom (€230 million) and Portugal (€180 million) are Europe's leading dinnerware exporters.

Macro-economic indicators

Real private consumption expenditure

Figure 5: Real private consumption expenditure growth

Change from previous year



Source: Eurostat

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 items, so growth in their consumption is expected to be moderate.

3. Which trends offer opportunities on the European market for ceramic dinnerware?

Master chef

European consumers are rediscovering the joy of cooking and enjoy showing off their cooking skills. This increased popularity in home cooking combines several trends, including the following aspects.

- A renewed interest in nutrition and health: Consumers like to cook a fresh meal on the spot, with fresh ingredients.
- The rise of the 'slow food movement': This movement emphasises being conscious of what you eat, sourcing food locally and respecting local food cultures.
- An increased desire to acquire and share skills: European consumers consider it a new, non-material luxury to learn new things and share them. This has sparked a renewed interest in the art of home cooking.

These new 'foodies' and 'master chefs' require good cooking tools, as well as quality dinnerware to present their meals.

Tips

- Offer high-quality, decorative dinnerware to allow consumers to display and share their

cooking experience.

- Oven-to-table dinnerware is popular with these consumers. These are items used to prepare food that are sufficiently decorative to put on the table, such as decorated casserole dishes. When designing dinnerware, remember that it needs to be both functional and decorative.

Changing eating culture

Social dining

Northern European countries are increasingly developing a table culture as well. This is inspired by, for instance, French or Italian food culture, but also by non-European ones such as Moroccan and Japanese. This means consumers are taking more time to sit and enjoy dinner, making it into a social event with family and friends, using their best tableware. As such, consumers are no longer afraid to invest in beautiful dinnerware that reflects their taste.

Casual dining

Yet there are also trends that counteract bringing more quality into dining. These include:

- increased urbanisation
- modern consumers' need for instant gratification
- eagerness not to miss out on anything
- multi-tasking
- being online 24/7.

This lifestyle has given rise to 'casual dining', where consumers have abandoned the set-piece family dinner in favour of:

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

Today's consumer is also an 'in-the-moment consumer'. They can be 'casual diners' on work nights, while turning into 'social diners' during the weekend. This offers opportunities to sell everyday dinnerware as well as special-occasion dinnerware to the same consumer.

Tips

- Find out about your target segment's dining culture. 'Social dining' and 'casual dining' each require a specific marketing mix.
- Social dining is especially popular among the new 'master chef' segment. These consumers like dinnerware that looks good on the table, is different and creates a talking point. They enjoy specialised items for, for example, fish dinners. Consequently, this dinnerware is slightly less price-sensitive and may be branded. It can be purchased from department stores or kitchen specialists. You should supply special dinnerware if social dining is your target segment.
- The 'casual diners' prefer more everyday functional ceramics. Consider supplying affordable dinnerware to, for instance, supermarkets and convenience stores, if casual dining is your target segment.

Personalisation

As European consumers become more mature, dinnerware has become more personal. A consumer's dinnerware collection therefore expresses individual taste more than ever. Through expressing good taste, it provides an opportunity to gain status in the eyes of friends and family. This has sparked some common home decoration trends in dinnerware.

Comprehensive consumption: mix and match

European consumers used to buy a traditional matching dinnerware set (from a heritage brand), which they treasured for life. The new consumer creates a personal collection of dinnerware from various sources and in various designs. Individual pieces may be replaced at will. They even combine newly bought pieces with flea-market finds or vintage buys. This allows consumers to be different and cater to the particular feeling of the moment.

Tips

- Create collections that allow consumers to mix and match, at different price points. Consider:
 - a wide colour palette
 - shapes and decorations
 - styles that can be combined.
- Offer replacement options by bringing out new lines that can combine with or replace older collections.
- Bring out new lines more than twice a year. This creates faster turnaround and more contemporary product ranges. It may also stimulate consumer desire to start collecting.

Handmade products

'Craft' or handmade products have become popular again, especially with mature consumers in a saturated market who are tired of standard, industrially manufactured products. Such consumers prefer individual, seemingly one-of-a-kind pieces that have been handmade or hand-finished. It is the consumer's way of displaying individual, discerning taste. The new 'master chef' consumer also enjoys handmade products.

Tip

- 'Craft' pottery techniques are an option if you are looking for segments that may be niche but premium. Handmade production can range from hand throwing to hand decorating. Consumers looking for a personalised purchase appreciate individualised output and the 'maker' stories behind the product.

New players are on the rise

Europe has a long tradition in ceramics, for instance in the United Kingdom, Germany, France and Italy. Heritage brand stories (Wedgwood, Meissen, Sèvres, Ginori) still dominate the scene, especially in luxury ceramics.

At the same time, new brand stories are emerging, such as Mud Australia and JIA Inc. European consumers are embracing them because of their craftsmanship, authentic style and refreshing way of communicating. For example, [Mud Australia](#) stains its porcelain instead of using coloured glazes. Existing home decoration wholesalers and brands are also discovering the gift and expressive value of dinnerware. This leads them to include dinnerware in their general product ranges.

Tip

- Consumers are open to new entrants to the dinnerware arena. New directions in material use and techniques offer opportunities, as well as new stories and origins. Supplying new Western brands or exporting individually, as a small but different brand producer, provide opportunities. However, the individual approach requires far greater sustained effort and resources.

Sustainability

The industry and consumers are becoming more interested in the environmental and social implications of production and consumption. This makes sustainable options in the market increasingly important. However, 'value for money' is still the main buying motive in most segments in this category. Therefore, consumers will not automatically pay a price premium for sustainable options unless the design is premium too.

Tips

- Think of ways to achieve a positive social or environmental impact in your process. Use sustainable solutions for:
 - raw materials
 - production
 - transport and distribution
 - consumer use
 - (waste) disposal.
- To add value, you have to combine a sustainable process with a high level of design.
- Communicate your sustainable values through your marketing communication and/or by applying for certification. For more information on certification, see our study about [buyer requirements for home decoration & home textiles](#).
- For more information on sustainability, see our special study on [sustainability in the home sector](#).
- For more information, see our study [CBI Trends - Home Decoration & Home Textile in Europe](#).

4 . With which requirements should ceramic dinnerware comply to

be allowed on the European market?

See our study about [buyer requirements for home decoration & home textiles](#) for the requirements applying to ceramic dinnerware.

With which legal and non-legal requirements must your product comply?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including ceramic dinnerware. It states that all products marketed in Europe must be safe to use.

Tips

- Read more about the [General Product Safety Directive at the EU Export Helpdesk](#).
- Use your common sense to ensure normal use of your product does not cause any danger.
- The [RAPEX database](#) lists products that the European Union has rejected at the border, or withdrawn from the market. Check the database for dinnerware (plates, bowls, etc.) or other ceramic products for an idea of what issues may arise.

European legislation

Europe has specific [packaging and packaging waste legislation](#). It for instance restricts the use of certain heavy metals.

Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as

- packing cases
- boxes
- crates
- drums
- pallets
- box pallets
- dunnage.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemical residues in products that are marketed in Europe. For ceramic dinnerware, this applies to:

- certain substances used in the manufacturing of ceramics
- certain dyes and enamel used for decoration.

Tip

- The European Chemical Agency provides useful information and tips on REACH. See for instance:
 - [REACH Annex XVII](#), a list of all restricted chemicals
 - [Information on REACH for companies established outside Europe](#)
 - [Questions & Answers on REACH](#)

Food Contact Materials: lead in ceramics

The European Union's legislation on [Food Contact Materials](#) also applies to dinnerware. This contains [Directive 2005/31/EC](#) for ceramic articles intended to come into contact with foodstuffs, which regulates lead limits in ceramic food contact materials. Lead glazes are used on a wide variety of ceramics, such as earthenware, stoneware and porcelain. Because food substances can absorb lead, this can be harmful. Therefore, some consumers may even prefer lead-free dinnerware. Especially consumers with children, as children generally absorb a higher percentage of ingested lead than adults.

Tips

- For more information, see the European Food Safety Authority's [Frequently Asked Questions on the Food Contact Materials legislation](#).
- There is currently no certification for lead-free dinnerware in Europe. If your products are lead-free, promote this clearly. This is especially relevant when it comes to dinnerware for children.

Which additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market. Think of sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes.

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of conduct. To prove compliance, the importer can request an audit of your production process. Once a company has been audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

Tips

- Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.
- Buyers appreciate a good story. If you can show that you have considered your company's performance, this may be a competitive advantage. This can be done, for instance, with a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) or the [ETI base code](#).
- For more information, see our special study on [Sustainability in the Home Sector](#).

What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. For ceramic dinnerware, a lot of labour goes into decorating (by hand). Especially when the production of your dinnerware is labour intensive, fair-trade certification can give you a competitive advantage.

Common fair trade certifications are from:

- [World Fair Trade Organisation](#) (WFTO)
- [Fairtrade International](#)
- [Fair For Life](#).

Tips

- Ask buyers what they are looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.
- Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Crystalline Silica

[Respirable Crystalline Silica](#) (RCS) can cause lung cancer through inhalation. The ceramics industry mostly uses crystalline silica in the form of quartz and cristobalite. Although European legislation cannot regulate working conditions in non-European countries, European buyers care about worker safety. They may demand proper handling of crystalline silica during production.

Tip

- For more information on respirable crystalline silica in various languages, see the [European Network on Silica](#). Refer for instance to:
 - the [Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products containing it](#)
 - a [Good Practice Guide](#)
 - European national [Occupational Exposure Limits](#).

5 . What competition will you be facing on the European ceramic dinnerware market?

The competition in ceramic dinnerware does not differ significantly from the sector in general. See our study about [competition in home decoration & home textiles](#) for a general overview. Also refer to our [top 10 tips for doing business with European buyers](#).

6 . Which channels can you use to put ceramic dinnerware on the European market?

The market channels and segments for ceramic dinnerware do not differ significantly from the

sector in general. See our study about [market channels and segments for home decoration & home textiles](#) for a general overview.

Market channels

E-commerce

E-commerce in home decoration is increasing. It can help reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online. They shop around and compare prices on home decoration items. Small (gift) items are especially suitable for this.

To supply e-commerce, you have to be able to work with:

- individual packing
- individual labelling
- limited min

Tips

- See our special study about [E-commerce in the 21st Century](#) for more information.
- Target online business-to-consumer retailers if you can meet the additional requirements.

Trade associations and fairs

These trade associations and fairs are useful sources for finding trading partners in Europe.

- [Ambiente](#), Frankfurt, February
- [Cerame-Unie](#) (European Ceramic Industry Association), represents the European Federation of Ceramic Table- and Ornamentalware (FEPP)
- [Maison et Objet](#), Paris, January (main) and September
- [Tendance](#), Frankfurt, August

Market segments

The European dinnerware market is mature and highly segmented. There are wide-ranging low-end, mid and high-end market segments. These can be subdivided into even more sub-segments. This may make it the most challenging home decoration category of all, as many ideas have already been tried out. Yet it is also the most inviting market, as anything is still possible and consumers are often open to change.

Low-end market

These are the everyday basics in dinnerware. The low-end market consumer is not very focused on the product and considers it a convenience good. Important characteristics are:

- functionality
- 'me-too' design
- easy to replace
- low price or bargain price
- quick and easy to purchase, for instance in supermarkets or online.

Mid-end market

Dinnerware in the mid-end market is still standardised, but generally is:

- trendier, with some interest in new innovative shapes or handmade effects
- mainly sold at general interior stores and mid-segment department stores
- retailed at reasonable prices.

Sometimes, the endorsement of a celebrity (such as a TV cook) stimulates sales in this segment.

High-end/premium market

In the high-end/premium market, dinnerware is characterised by:

- excellent design
- craftsmanship
- brand names
- availability in department stores and brand stores.

Hospitality market

Besides the consumer market, the hospitality market (hotels, catering) represents a specific segment. Key features here include:

- durability
- functionality
- price
- the ability to add branding to the product, according to the importer's or retailer's specifications.

7 . What are the end-market prices for ceramic dinnerware?

Table 2 gives an overview of the prices of ceramic dinnerware in the low, middle and high market segments.

Table 2: Indicative consumer prices of ceramic dinnerware

	Low-end	Mid-end	High-end
16-piece set	€11-35	€64-81	€145 or more
5-piece place setting	€20-30	€30-62	€115 or more
Salad bowl	€4-25	€43-66	€87 or more

Consumer prices depend on the value perception of your product in a particular segment. Your marketing mix influences this through:

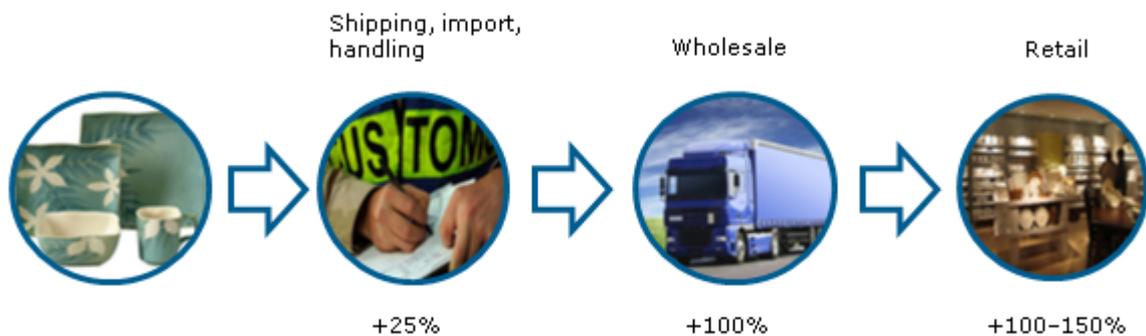
- product benefits
- promotion (brand or not, communication of product benefits)
- points of sale (reseller positioning)
- price.

Tips

- The value perception of your product in the chosen segment determines its price. Your product quality and price must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment. Adjust your cost accordingly.
- Understand your segment. 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 ceramic dinnerware in the supply chain.

Figure 6: Indicative price breakdown for dinnerware, mark-ups in %



Source: ProFound, 2014

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