

# The European market potential for salad sets

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The COVID-19 pandemic has caused the European market for table and kitchenware to decline. At the same time, it has led consumers to spend more time cooking and socialising at home, and many plan to continue doing so in the future. This offers you opportunities, as 40% of European table and kitchenware imports is sourced directly from developing countries. An increased interest in wellness, sustainability and craftsmanship are important trends that shape the market for salad sets.

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## 1. Product description

In Home Decoration and Home Textiles (HDHT), salad sets are categorised under kitchen or serveware. Salad sets consist of a bowl and a set of servers.

Retailers generally offer servers and bowls as separate items, although they also come in sets. This allows consumers to 'mix and match' and makes bowls multifunctional. They can be used for salads, but also as fruit bowls or mixing bowls, depending on their size and material. Servers have also become a gift item and consumers often own extra pairs. Consequently, it makes sense to market servers and bowls separately.

Figure 1: Metal salad servers with ceramic bowls



Source: [Unsplash](#)

This study uses the following codes to indicate trade in salad sets:

Table 1: Product codes for salad sets

Harmonised System (HS)	Prodcom	Description
3924 10	22 29 23 20	Tableware and kitchenware of plastics
4419 19	16 29 12 00	Tableware and kitchenware of bamboo (excluding chopsticks, bread boards, chopping boards and similar boards)
4419 90	16 29 12 00	Tableware and kitchenware of wood other than bamboo (excluding interior fittings, ornaments, coopers' products, tableware and kitchenware components of wood, brushes, brooms and hand sieves)

6911 10	23 41 11 30	Tableware and kitchenware of porcelain or china (excluding ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packing of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)
6912 00 21	23 41 12 10	Tableware and kitchenware of common pottery
6912 00 23	23 41 12 30	Tableware and kitchenware of stoneware
6912 00 25	23 41 12 50	Tableware and kitchenware of earthenware or fine pottery
6912 00 29	23 41 12 90	Tableware and kitchenware, other
821591	25 71 14 80	Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware of base metal, plated with precious metal (excluding sets of articles such as lobster cutters and poultry shears)
821599	25 71 14 30	Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware of base metal, not plated with precious metal (excluding sets of articles such as lobster cutters and poultry shears)

## Functionality

Salad sets are used to serve (dinner) salads. Your items must be safe to come into contact with food. This is particularly an issue with wooden items. Generally, a vegetable oil is applied to ensure safety. Sometimes, a wood species' natural antiseptic qualities are highlighted (like oak). Lacquering seals the wood and prevents direct contact with the natural state of the wood. Since this natural state is a major selling point, lacquering isn't advisable.

## Size

A salad bowl needs to be big and wide enough to present a dinner salad. Standard bowls are generally 11-13 cm high and 23-27 cm wide. Servers are usually 30 cm long. Much larger or smaller servers can be 'statement pieces', but they are often less practical in use.

## Material

Salad sets come in a wide variety of materials, ranging from ceramics (earthenware, stoneware, porcelain and bone china), glass, metal, wood and bamboo to plastics. They can be produced industrially, by hand or with the help of simple power tools.

In wooden salad sets, the type of wood is very important. It comes in a great variety of European and tropical

species, such as ash, beech, oak, rubberwood, teak and olive wood. Consumers enjoy the grain and colouration of the wood itself. The perceived value (rarity, origin) of the wood largely determines the price of the bowl. Handmade production and natural variations in the wood grain mean items may differ slightly. You should make the importer aware that deviations can occur and provide a bandwidth for this.

Figure 2: Basic wooden salad set



Source: [Pixabay](#)

## Design

A nice bowl and servers are a real eye-catcher on the table. Wooden salad sets, and especially bowls, are relatively undecorated to show the character of the wood as the main feature. Design value also comes from the technical mastery in making the bowls and servers. For example, a hand-carved item from one piece of wood is generally more appreciated than veneer or laminated items. A combination of materials in one item can also take salad bowls and servers to higher price brackets.

Bowls may deviate from standard sizes and play with height and diameter to change the look. Some taper more from a smaller base, others are rounder or more organic. Salad servers are generally more innovative in shape and form, deviating from the standard 'spoon and fork' shapes.

## Durability

Consumers use their salad sets frequently, which makes the sturdiness of the material critical. Durability depends on the ability to resist scratching, chipping and breaking when dropped. The items must be dishwasher-, microwave- and refrigerator-proof. Wooden salad sets are an exception, as they should generally be hand-washed and dried with a damp cloth to prevent cracks, mould and other damage.

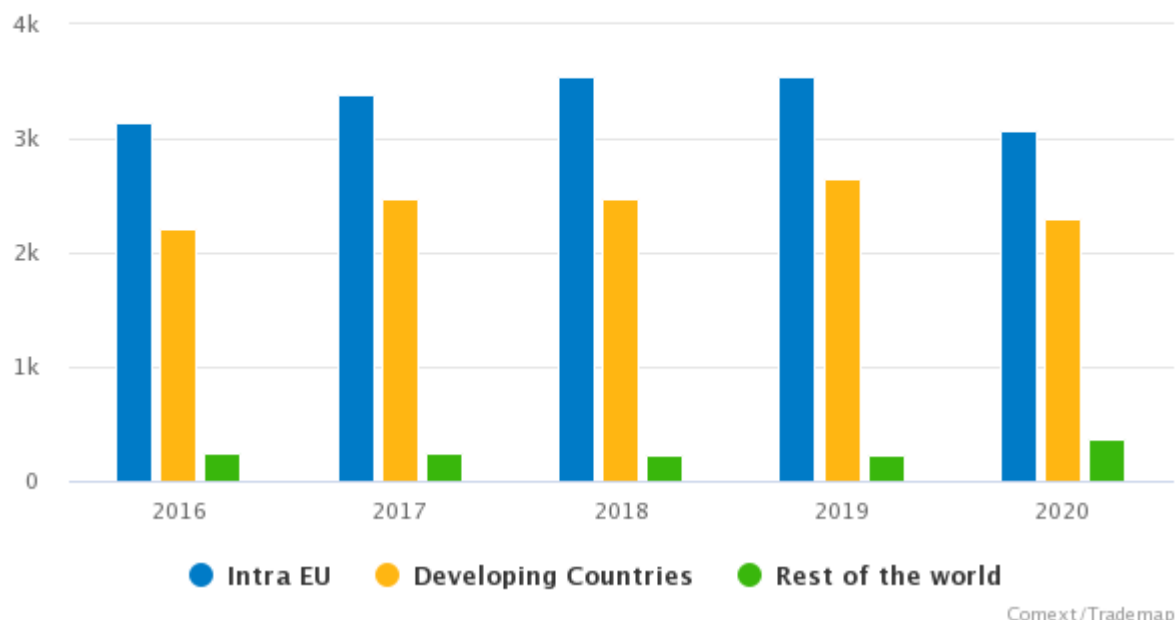
## 2. What makes Europe an interesting market for salad sets?

Before the COVID-19 pandemic, the European table and kitchenware market was growing steadily. Around 40% of the import value is sourced directly from developing countries, making Europe an interesting market for you.

(!) Because no specific trade data are available for salad sets, these statistics cover table and kitchenware in general.

**Figure 3: European imports of table and kitchenware**

in € million



Between 2016 and 2019, European imports of table and kitchenware – including salad sets – increased from €5.6 billion to €6.4 billion. In 2020 however, the [outbreak of the coronavirus](#) (COVID-19) led to an -11% decrease. This added up to an average annual growth rate of 0.6% over the period from 2016 to 2020 and pushed the market back to a size comparable to 2016/2017.

Around 40% of the total European table and kitchenware import value is sourced directly from developing countries. This market share has been fairly stable in recent years. Because of this, these imports showed a similar pattern to the overall market, increasing until 2019 and then falling back to 2016/2017 levels. Nevertheless, Europe is an interesting market for you, as an exporter from a developing country.

In 2021, the COVID-19 pandemic and the measures taken against it worldwide continue to affect international trade. At the same time, lockdowns have resulted in an increased focus on the home and garden. This may partly or fully offset the negative effects on the market. Demand is driven by consumers' increased interest in wellness, including in slow cooking and learning new skills. For more drivers of demand, see 'which trends offer opportunities?' below.

### Tip:

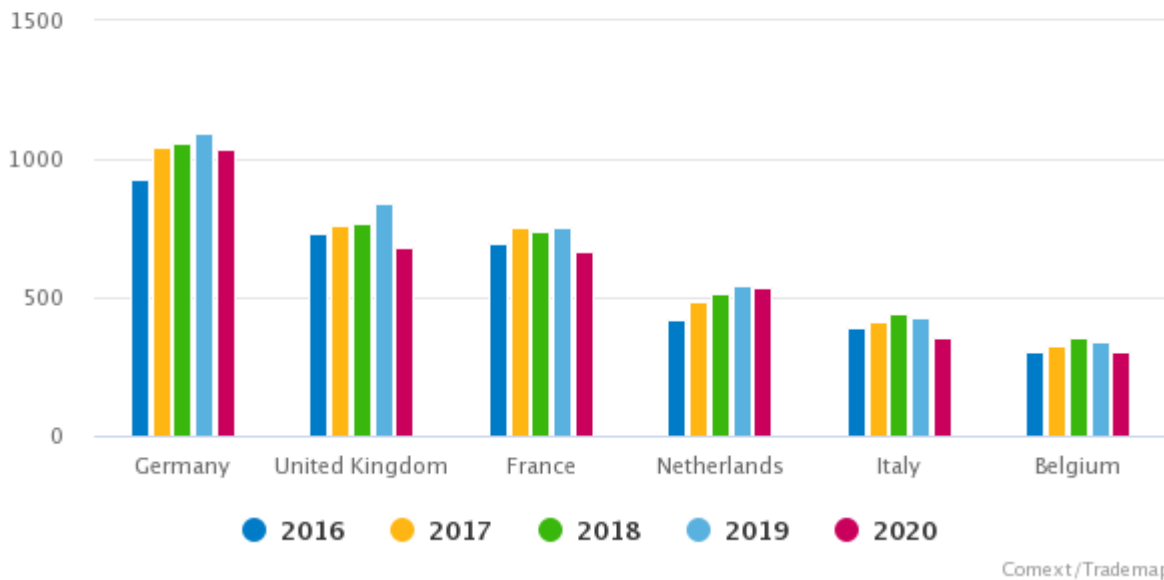
For more information on the short-term and long-term impact of the coronavirus pandemic on the sector, see our study on [how to respond to COVID-19 in the HDHT sector](#).

## 3. Which European countries offer most opportunities for salad sets?

The larger Western European economies are the main importers of table and kitchenware. However, importers in these countries generally sell their products across Europe. Your best strategy is therefore to focus on a particular segment, rather than a specific country.

**Figure 4: Leading European importers of table and kitchenware**

in € million



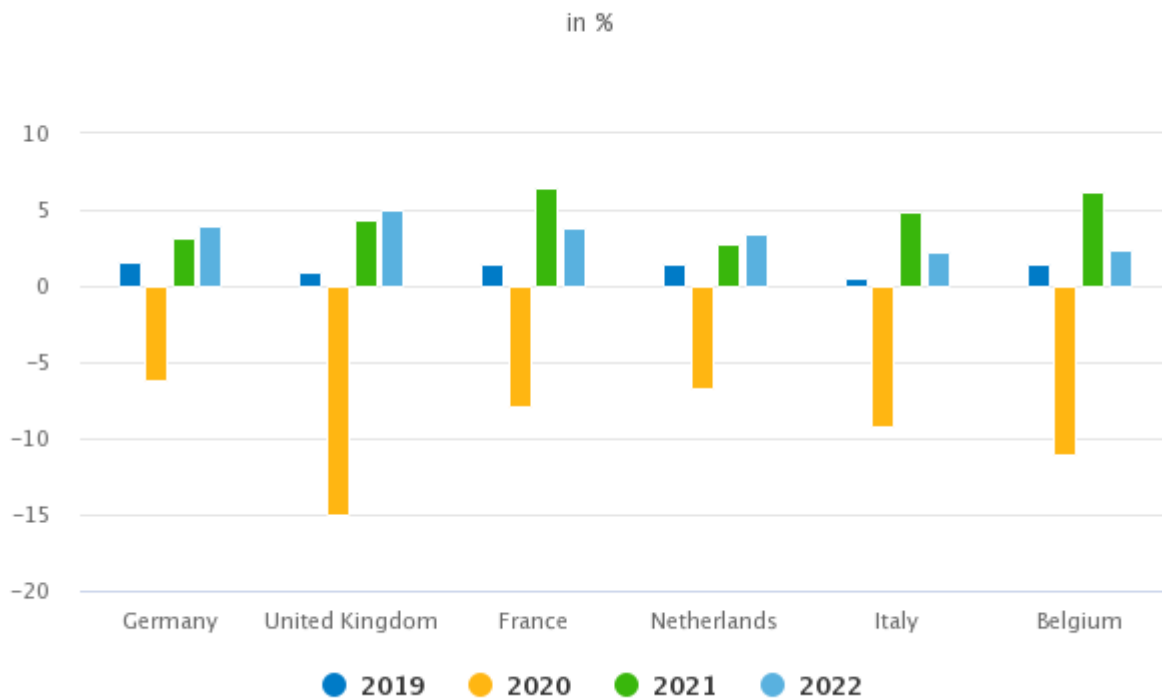
*In 2020, Germany remained Europe's leading importer of table and kitchenware with 18% of imports, followed by the United Kingdom and France with 12% each. Together they accounted for nearly half of the European total. Smaller markets with a share of less than 10%, but still in the top six of leading importing countries, are the Netherlands (9.3%), Italy (6.2%) and Belgium (5.3%).*

However, you should be aware that in the European market, countries have different roles. A rough distinction can be made between countries that are mainly importers and countries that are mainly manufacturers. Most Western European importers not only sell their imported products in their own country, but also distribute them across Europe. This explains why in HDHT, imports into small countries like Denmark and the Netherlands often far exceed the demand in their own domestic market.

In terms of marketing, you need to realise that countries are not markets. In HDHT there are different market segments, ranging from low to high (also see our study on [market entry for salad sets](#)). Every European country has these segments, although their size may vary per country. Therefore, it makes much more sense for you to identify a particular segment in your product group and connect with the importers and distributors in that segment, instead of a specific country. These distributors will then sell your products in that segment across Europe.

## **Real private consumption expenditure**

Figure 5: Real private consumption expenditure growth



Real private consumption expenditure is an important indicator for growth in demand. The HDHT sector, which includes the market for salad sets, is sensitive to economic cycles. When economic circumstances and prospects are poor, consumers postpone buying non-essential items. Conversely, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products tend to increase.

Until the outbreak of the COVID-19 pandemic, the leading European markets showed an annual growth in real private consumption expenditure of around 1-3%. Due to the pandemic, this trend was reversed in 2020. However, because the lockdowns increased consumers' focus on their home, the effect on the HDHT sector may have been limited. For the coming years, growth is expected to bounce back into positive figures.

## Germany continues to be the largest European importer

Germany is the largest economy in Europe, home to nearly a fifth of the European Union's population. It is widely considered the stabilising force within the European Union. The Economist has forecast [Germany to be the first major European economy to recover from the current crisis](#). This is based on both the country's healthy finances before the crisis and its large industrial sector, the reboot of which also benefits suppliers abroad. The European Commission likewise projects [German GDP to be back at pre-COVID-19 level at the turn of 2021/2022](#).

Between 2016 and 2019, German table and kitchenware imports increased from €924 million to €1.1 billion, at an average annual rate of 5.9%. In 2020, they decreased by -5.8%, a considerably smaller decrease than the European average. This added up to an average annual growth of 2.8% over the period from 2016 to 2020.

Germany sources around 40% of its import value directly from developing countries, matching the European average. These imports decreased by 10% in 2020, falling back to their 2016/2017 levels. However, most of this decline was due to a drop in imports from China, the leading exporter of table and kitchenware to Germany.

In addition to having a large domestic market, Germany is also a key trade hub within Europe. Combined with the forecast economic recovery, this makes Germany an interesting market for you.

## Brexit may boost direct trade with the United Kingdom

British table and kitchenware imports also decreased in 2020, by a rather steep -19%, to an import value of

€680 million. However, this relatively sharp decline was partly due the fact that imports had peaked at €840 million in 2019. This added up to an average annual decline of -1.7% between 2016 and 2020.

The United Kingdom sources around two thirds of its €257 million worth of imports directly from developing countries, which is their largest market share in Europe. China continued to be the UK's main supplier of table and kitchenware in 2020, with 55% of British imports, followed at a considerable distance by Germany (6.0%) and France (4.3%).

The United Kingdom's withdrawal from the European Union (Brexit) has led to [relatively low consumer confidence levels](#) since 2016. At the same time, Brexit may lead to British buyers importing more items directly from developing countries, rather than from European importers. This allows them to avoid additional fees now that they are no longer part of the European Union's single market. The devaluation of the British pound since the Brexit referendum has also made direct trade more attractive.

[British GDP decreased by -9.9% in 2020](#), a record decline. At the start of 2021, a Financial Times survey among leading economists projected the [British economy to be one of the last to recover](#). Since then, however, the Bank of England governor Andrew Bailey has indicated he expects the economy to be [back to pre-COVID levels by the end of 2021](#). Considering this positive development and the potential increased interest in direct sourcing from developing countries, the United Kingdom could well offer you opportunities.

## France's economy is set to recover in 2022

Between 2016 and 2019, French imports of table and kitchenware increased at an average annual rate of 2.8%. In 2020, however, they fell by -11% to €670 million. This added up to an average annual decline of -0.8% over the period from 2016 to 2020.

Compared to France's overall imports of kitchen and tableware, its direct imports from developing countries fell by a slightly lower rate of -8,7% to €227 million in 2020, which kept them above their 2016 level. This added up to a market share for developing countries of 34%, which is below the European average. China is France's leading supplier of table and kitchenware with 27%, followed at a distance by Netherlands and Germany with 11% and 10% respectively.

Economic growth in France had already slowed down before plummeting to -8.3% in 2020 due to the pandemic. Global uncertainties and the effects of social unrest weighed on consumer confidence and the consumption of non-essential products. However, [French GDP is expected return to its pre-pandemic level during the first half of 2022](#), slightly ahead of the European average. This could make France an interesting market for you.

## The Netherlands is an important European trade hub

Dutch imports of table and kitchenware increased at an average annual rate of 9.0% between 2016 and 2019. In 2020, they decreased by a fairly modest -1.4% to €535 million. This added up to an average annual growth of 6.3% over the period from 2016 to 2020. In 2020, direct imports from developing countries decreased by -6.3% to €265 million. Despite this decline, these imports grew by an average annual rate of 7.8 % between 2016 and 2020. Developing countries account for 49% of imports into the Netherlands, which is their second largest import market share in Europe behind the UK.

China is by far the leading supplier of table and kitchenware to the Netherlands (41%), followed at a distance by Germany (14%). The performances of other exporters to the Netherlands varied considerably in 2020. For example, while China's exports decreased slightly, Indonesia increased its exports to the Netherlands.

[Dutch GDP is projected to return to 2019-levels at the end of 2022](#), lagging slightly behind the European average. As well as the COVID-19 pandemic, Brexit and international trade disputes between the United States and China and between the United States and Europe may have a big impact on the Netherlands. Because the country heavily depends on international trade, negative developments in that area strongly affect its economic performance. This, in turn, affects consumption of salad sets.



Since the Netherlands is a big re-exporter of goods, the impact on the imports of HDHT products goes beyond the country itself. Developments in other European countries will also play a role, making total Dutch imports difficult to predict. However, as a large share of the Dutch import market is sourced directly from developing countries, the Netherlands continues to be a relatively interesting market for you.

## **Italy's economy is expected to recover particularly slowly**

Being particularly affected by the pandemic, Italy experienced a GDP decline of -8.8% in 2020. [Italian GDP is not projected to reach its 2019-level in by the end of 2022](#), as the Italian economy is still forecast to have the slowest recovery in Europe. This is expected to affect consumer confidence and the consumption of non-essential products in the coming years.

Italian imports of table and kitchenware were already in decline before COVID-19 disrupted global trade. In 2020, they fell further by an extraordinary -16%. The decrease from €425 million in 2016 to €357 million in 2020 represented an average annual decline of -2.2%. Direct imports from developing countries, which peaked at €180 million in 2019, were hit particularly hard by the pandemic, falling by -24% to €142 million in 2020. This added up to an average annual decline of -1.0% between 2016 and 2020.

China is Italy's leading supplier of table and kitchenware with a market share of 31%, followed by France and Germany with 13% and 10% respectively. With Italian imports of table and kitchenware generally declining across the board, prospects on this market are likely to be limited in the coming years.

## **Belgium is another trade hub**

After peaking at €357 million in 2018, Belgian imports of table and kitchenware gradually fell back to their 2016 level of around €303 million. Direct imports from developing countries were fairly stable between 2016 and 2019. In 2020, they dropped by -14% to €107 million. This brought the import market share of developing countries to 35%, which is below the European average.

27% of Belgian table and kitchenware imports is sourced from China, Belgium's leading supplier. Around a fifth of Belgian table and kitchenware imports is supplied by the Netherlands, suggesting this may be a good route to enter the market.

After a decline of -6.2% in 2020, [Belgian GDP is expected to return to its pre-pandemic level in the second half of 2022](#). Like the Netherlands, Belgium is an important trading hub in Europe. Consequently, given the economic difficulties in Europe as a whole, overall Belgian imports in the coming years are difficult to predict.

### **Tip:**

Do not just focus on specific European countries. Instead, identify the appropriate segment and let your buyers distribute your products across Europe within this segment.

## **4. Which trends offer opportunities or pose threats on the European salad sets market?**

The market for salad sets is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. We will outline the main developments below, starting with the potential effects of the recent COVID-19 outbreak on the HDHT market.

### **COVID-19 and trends in HDHT and salad sets**

An expected outcome after the COVID-19 crisis is that people will be more focused on the home, having been in lockdown. A major factor in consumer spending will be the disposable income consumers may or may not have after the pandemic. The level of concern about this is expressed by consumer confidence, which continues to be

relatively low. This makes consumers reluctant to spend on anything beyond food, cleaning products, and other household essentials.

However, the pandemic has boosted consumer interest in some areas, such as:

- cooking
- wellness / fitness at home
- working from home

Spending a lot of time at home has also moved consumers towards:

- a reappreciation of their homes and the desire to make their home more pleasant, practical and comfortable overall
- bringing the outdoors inside and vice versa
- removing clutter

These trends are partly a continuation of consumer trends that were already ongoing; some have been accelerated as a direct consequence of COVID-19 and subsequent lockdowns. In addition, the pandemic has demonstrated the fragile balance on this planet. As such it is another important demonstration of the fact that we need to produce more sustainably, taking care of our resources, our people and the planet in general. These developments underline the importance of the existing sustainability and home cooking trends in the market for salad sets.

## **Wellness: slow and connected**

Wellness is a dominant consumer trend. In how they live and how and what they consume, consumers are making sure that they are improving their physical and mental health.

### **Slow cooking and dining**

A key trend in the HDHT sector is the increased interest in 'slow' cooking and (social) dining. This trend involves preparing healthy meals and taking the time to sit and enjoy dinner with family and friends, boosting physical and mental wellness. It also relates to the 'home sweet home' trend, where European consumers are trying to make the home a place where they genuinely connect with family and friends.

Due to the pandemic [people are spending more time cooking and socialising as a family/household](#), and many plan to keep doing so in the future. This development is particularly prominent in younger generations, as older consumers probably already spent more time on these activities before the lockdowns. Such a long-term increase could further boost consumers' interest in salad bowls and servers, to help prepare meals and set a well-laid table that adds to the social experience of dinners.

### **Master chef**

Northern European countries are increasingly developing a dining culture. This is inspired by the French or Italian food culture, for instance, but also by the cultures of Non-European countries like Morocco and Japan. This means consumers are taking more time to sit and enjoy dinner. They turn it into a social event with family and friends, using their best dinnerware. These consumers have learnt to identify and appreciate good dinner and serveware and are increasingly making individual choices.

The master chef trend is characterised by consumers taking pride in developing and showing off their cooking skills. This is in line with two strands of wellness: developing your capabilities and 'social connection'. European consumers are rediscovering the joy of cooking and inviting their friends and family to join in. This is strongly promoted by chefs and cooking shows on television and in other media. Amateur cooks increasingly want to work with the same kitchenware as the real chefs, and have therefore become slightly less price-sensitive and more sensitive to branding.

## Made by hand

In slow dining, consumers take pride in their serveware. This makes them slightly less price-sensitive and more design-oriented. Such consumers prefer individual, seemingly one-of-a-kind pieces that have been handmade or hand-finished to display their personal good taste.

Handmade salad sets form a niche in a kitchen and serveware market, where industrialised manufacturing is the norm. Salad sets that are fully or partly handmade start in the mid-high segment and can reach into the premium segment. However, while offering handmade products can move you up into the higher value segments, you should be aware that volumes may be limited.

### Tips:

To be successful in the dinner and serveware market, you need to follow trends in food, cooking and dining. You can do this by following food-oriented trade fairs such as [Anuga](#) or [Biofach](#), viewing [cooking programmes](#) and reading [magazines](#) on the subject.

Engage in storytelling. Add cultural value by showing your local and traditional food preparation and dining practices on your website and social media communication. Making and maker stories are very much sought after by consumers looking to improve their knowledge and skills. Stories about your sustainable values and actions offer 'feel-good' value to consumers in the wellness segment.

Consider (environmentally friendly) gift packaging. Dinner and serveware items are attractive gifts for this group of consumers, so gift packaging can add value for both your importer and the reseller. Remember: gifting is connecting, which is a basic principle of well-being.

Do not coat your woods, work with natural materials, and use the original natural colours in your products. Natural materials make the consumer feel closer to nature – again a strong need in wellness.

See our article on how [the COVID-19 crisis boosts the importance of the wellness trend in HDHT](#) for more information.

## Sustainability: natural materials and fair-trade values

Both the HDHT sector and consumers are becoming more concerned about the environmental and social effects of production and consumption. Sustainability is a priority for [Millennials](#). For this new group of consumers, sustainability is about their future wellbeing. Millennials are much more likely than previous generations to 'vote with their wallets' by buying products that contribute to a better world. Therefore, including people and planet values in your principles and business practices now also makes good business sense.

The COVID-19 pandemic has further underlined the importance of sustainability. For most consumers (particularly the younger generations), [the COVID-19 crisis has made it more important that both consumers and companies improve their sustainability](#). In addition, [most people want significant change to make the world fairer and more sustainable after COVID-19](#).

There is a real market for sustainable salad set options, especially in the higher segments. Natural materials like wood are increasingly popular, especially when combined with supreme craftsmanship. In mature markets (particularly in Northwestern Europe), roughly one in ten bowls and servers at retail level is made of wood. A wooden salad bowl or set of servers is usually a bit pricier than items made of industrially produced materials like ceramics or plastics. This makes them a good fit with the mid-end to high-end market.

### Tips:

Improve your sustainability performance. You can help improve social and environmental practices in any aspect of the value chain of salad sets, no matter what materials they are made of: in the selection and use of raw materials, in the production process, in transport and distribution, in helping consumers use your items longer, and, at the end of the cycle, in ensuring that the materials are recyclable or biodegradable.

If your importer is interested, consider certification options such as fair trade. The fair-trade market is traditionally strong in offering salad servers and bowls, which are often made by hand and from natural materials. For more information, see our study on [buyer requirements](#).

Clearly communicate your sustainable values through your marketing materials. If your products have a unique origin and/or story, communicate the details in terms of special techniques, materials, producers, processes or meanings. This may add value to your concept and your importer's.

For more information, see our special study on [sustainability](#).

## A new appreciation of craftsmanship

Salad sets are no longer 'non-descript' tools for serving food, like trays or trivets. They have become eye-catching items at the table. This upgrade is closely connected to the trends of slow dining and wellness in general. We are seeing brands and designers investing in sets that show craftsmanship and an innovative use of materials, especially in the higher segments. This makes a consistent design investment in this product group well worth it.

European consumers want to show their good personal taste in their interiors, including the serving pieces they put on the table. In salad sets, consumers express their individuality by 'mixing and matching'. They do not necessarily buy bowls and servers in sets, in the same material or style. Instead, they prefer to combine a stainless-steel bowl, for example, with fine olivewood servers. This trend is particularly strong among Millennials, who don't want to stick to traditional 'norms' in dinnerware, such as having to buy a complete set in a coherent style.

Figure 6: Mixing and matching



Source: [Pxhere](#)

## Tips:

If you offer sets, be aware that your bowls will have a much slower turnaround than your servers, which will need to be constantly replenished. By contrast, a bowl can have a much more stable presence in your offer. While a salad bowl cannot do without servers, salad servers are often offered as a stand-alone item. Also, consumers often have several pairs of servers, with they combine at will with their salad bowl.

Consider gift packaging, especially for the servers. Salad sets are perfect gifts, at any end of the market. This is even more true for servers than for the bowls.

Offer choice, to allow consumers to develop their own personal collections. Especially in servers, we see a wide range of possibilities in terms of design ideas, ranging from a focus on special materials to amazing craftsmanship, innovative shapes and humour.

Combine materials to add value and achieve a higher price level. Examples include combinations of wooden servers with a stainless-steel tip, as well as bowls combining wood and glass, or bamboo and ceramics. Similarly, there are innovations combining handmade and industrial processes.

Example of company:

The Vietnamese company [Thang Long Crafts Manufacture & Export JSC](#) (TLC) produces table and kitchenware in various materials, including bamboo and lacquerware salad sets. Although bamboo is considered an environmentally friendly resource, TLC does not clearly communicate sustainable values. They offer effective production, resulting in good quality at reasonable prices, with flawless service. This allows them to cater to the volume end of the consumer and project markets through wholesalers and multiple retailers.

This study was carried out on behalf of CBI by [Globally Cool B.V.](#) in collaboration with GO! GoodOpportunity.

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