

The European market potential for salad sets

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The European market for tableware and kitchenware is growing. The COVID-19 pandemic has led consumers to spend more time cooking and socialising at home, and many plan to continue doing so in the future. It has also increased the focus on trends like wellness. Salad sets fit in well with this trend. This offers you opportunities, especially given that imports from developing countries are increasing. Other important trends that are shaping the market for salad sets include an increased interest in sustainability and artisanry.

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1. Product description

The home decoration and home textiles (HDHT) segment comprises several [categories of product groups](#). Salad sets are categorised under kitchenware or serveware. A salad set consists 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’. It also 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 become popular gift items, and consumers often own multiple sets. It therefore makes sense to for servers and bowls to be marketed separately.

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

Table 1: Product codes for salad sets

Harmonised System (HS)	Description
3924 10	Tableware and kitchenware, of plastics
4419 19	Tableware and kitchenware, of bamboo (excluding chopsticks, bread boards, chopping boards and similar boards)

4419 20	Tableware and kitchenware made of tropical wood (excluding interior fittings, ornaments, coopers' products, tableware and kitchenware components made of wood, brushes, brooms and hand sieves)
4419 90	Tableware and kitchenware made of wood other than bamboo or tropical wood (excluding interior fittings, ornaments, coopers' products, tableware and kitchenware components made of wood, brushes, brooms and hand sieves)
6911 10	Tableware and kitchenware made 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 made of metal)
6912 00	Tableware, kitchenware other household articles and toilet articles made of ceramics other than porcelain or china (excluding statuettes and other 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 made of metal)
821591	Spoons, forks, ladles, skimmers, cake servers, fish knives, butter knives, sugar tongs and similar kitchenware or tableware made of base metal, plated with precious metal (excluding sets of articles, such as lobster cutters and poultry shears)
821599	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)

Because no specific product codes are available for salad sets, the codes and statistics cover examples of tableware and kitchenware and cutlery in general. The group of ceramics other than porcelain or china also includes other household articles and toilet articles.

Functionality

Salad sets are used to serve various types of salads. They must be safe to come into contact with food. This is particularly an issue with wooden items. In most cases, a vegetable-based oil is applied to ensure safety. Sometimes, the natural antiseptic qualities of certain species of wood (are highlighted (e.g. oak). Lacquering is

not advisable, as it seals the wood and prevents direct contact with the natural state of the wood. This natural state is actually a major selling point.

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. They come in a wide 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.

Design

A nice bowl and servers are a real eye-catcher on the table. Wooden salad sets — and especially the 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.

Figure 1: Habitat UK – Hand-thrown and hand-decorated ceramic bowls

Source: [Habitat UK @ YouTube](#)

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 often, 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 safe for use in the dishwasher, microwave and refrigerator. 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?

Salad sets are well suited to wellness and other key sector trends, including slow cooking. European imports of tableware and kitchenware — including salad sets — have grown, especially those coming directly from developing countries.

Because no specific product codes are available for salad sets, the statistics below cover examples of table- and kitchenware and cutlery in general. The group of ceramics other than porcelain or china also includes other household articles and toilet articles.

Source: UN Comtrade

European imports of tableware and kitchenware — including salad sets — grew from €6.1 billion in 2018 to €7.2 billion in 2022, at an average annual rate (CAGR) of 4.3%. Due to strong growth, in 2022 more than half of the import value came directly from developing countries. These imports grew from €2.7 billion in 2018 to €3.8 billion in 2022, at a CAGR of 8.8%. Taken together, these developments make Europe an interesting market for you, as an exporter from a developing country.

The effects of the COVID-19 pandemic and the war in Ukraine have disrupted international trade. At the same time, lockdowns drew increased focus towards the home and trends like wellness, including slow cooking and learning new skills. Salad sets are well suited to these trends. This could at least partially compensate for the pressure that the [cost-of-living crisis](#) is exerting on consumer spending. For information on other factors that are driving demand, see 'Which trends offer opportunities?'.

Tip:

Be prepared for potential future trade disruptions. See our study on [how to respond to COVID-19](#) for information on how to prepare your business for the future.

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

The larger Western European economies are the main importers of tableware and kitchenware. Given that importers in these countries generally sell their products across Europe, however, your best strategy would be to focus on particular segments, rather than specific countries.

Source: UN Comtrade

In 2022, Germany remained Europe's leading importer of tableware and kitchenware, accounting for 18% of all imports. France and the United Kingdom followed, with 12% each. Smaller markets with a share of less than 10%, but still in the six leading importing countries, are the Netherlands (9.6%), Italy (8.1%) and Spain (6.4%). Although all these markets performed particularly well in 2021 and 2022, it is unclear whether this will continue.

Focus on segments

European countries have different roles in the HDHT market. Some are mainly importers, and others are mainly manufacturers. Western European countries are mainly importers, and most Western European importers are re-exporters. They do not sell their products only in their own countries, but distribute them across the continent. It is for this reason that small countries (e.g. the Netherlands) often import a much greater volume of HDHT products than they consume.

In terms of marketing, you should be aware that countries are not markets. The HDHT market consists of several different segments, ranging from low-end to high-end (see our [study on market entry for salad sets](#)). Every European country has these segments, although their size may vary. It therefore makes much more sense to focus on segments within which your product groups fall and connect to importers within those segments. These importers will then sell your products within those segments across Europe.

Consumer spending is under pressure

Sales of salad sets are sensitive to economic cycles. When economic circumstances and prospects are down, consumers postpone buying items that they do not urgently 'need'. When economic conditions are good, purchases of such non-essential products tend to rise.

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the subsequent energy crisis. This reflected a large drop in the expectations of households concerning the general economic situation in their country, as well as about their own future financial situation. Consumer intentions to make major purchases also fell. This lower consumer confidence may well lead to lower spending, as reflected in the modest forecasts for 2023/2024.

Source: OECD

* forecasts

Before the COVID-19 pandemic, consumer spending ('private consumption expenditures') in the leading European markets grew by about 1-3% per year. This trend was broken in 2020, due to the pandemic. In 2021, growth rebounded to positive figures. Forecasts for 2023/2024 are modest, in line with consumer confidence.

Germany is the largest European importer

Germany is Europe's leading importer of tableware and kitchenware. The country's large domestic market, role as a trade hub and relatively high imports of these product groups from developing countries could make it an interesting market for you.

Germany's imports grew from €1.1 billion in 2018 to €1.3 billion in 2022, with a CAGR of 4.3%. In 2020, they decreased by just -2.0%, a considerably smaller decrease than the European average. Germany's role as a key trade hub in Europe may have helped the country maintain its performance.

Due to strong performance in 2022, the direct import-market share for developing countries grew to 64%. This is one of the largest shares in Europe. These imports grew from €549 million in 2018 to €822 million in 2022, with a strong CAGR of 11%. China is Germany's main supplier of tableware and kitchenware, accounting for more than half of these imports. Several developing countries have nevertheless increased their market shares as well, including Turkey (3.0%), India (1.6%), Bangladesh (0.9%) and Indonesia (0.8%).

France relies on intra-European imports

France is Europe's second-largest importer of tableware and kitchenware. The country's imports grew from €753 million in 2018 to €847 million in 2022, with a CAGR of 3.0%. This included particularly strong growth in 2021, following a drop in 2020. At the same time, however, France relies relatively heavily on intra-European trade. This may limit your opportunities for entering the market.

The direct import-market share for developing countries dropped from 47% in 2019 to 34% in 2020. Since then, it has recovered to 41%, although this continues to be relatively low. France has apparently substituted some of its direct imports from developing countries with supplies from European trade hubs (e.g. the Netherlands, Germany and Belgium). With a 12% share, the Netherlands has now become France's second-leading supplier, after China (33%).

Brexit may stimulate direct trade with the United Kingdom

The United Kingdom is likely to offer opportunities, considering its high level of imports from developing countries and its potentially increased interest in direct sourcing. [The United Kingdom's withdrawal from the European Union](#) (Brexit) has been accompanied by relatively low levels of consumer confidence since 2016. At the same time, Brexit may lead British buyers to increase their direct imports from developing countries, rather than from European importers. This could allow them to avoid additional fees now that they are no longer part of the European Union's single market.

British imports of tableware and kitchenware grew from €767 million in 2018 to €834 million in 2022, with a CAGR of 2.1%. The direct import-market share for developing countries grew to 80% in 2022. This is one of the largest shares in Europe. China is the leading supplier, with more than 60% of the imports. India (4.3%), Turkey (4.1%) and Thailand (3.4%) follow at a considerable distance, having overtaken the European countries of Germany and France.

The Netherlands is an important European trade hub

The Netherlands is an important European trade hub, with a rapidly growing import market for tableware and kitchenware. This could make the country an interesting market for you.

Dutch imports grew from €466 million in 2018 to €694 million in 2022, with a CAGR of 10%. Growth was particularly strong in 2021 and 2022. About half of these imports came directly from developing countries, having grown from €208 million in 2018 to €345 million in 2022, with a CAGR of 14%. China (41% in 2022) and Germany (14%) are the leading suppliers.

Given that the Netherlands is heavily dependent on international trade, Brexit and international trade disputes may have a major impact on the country. For this reason, Dutch imports are difficult to predict.

Italy's imports recover from dip

Italy could offer opportunities, given the strong recovery of its imports of tableware and kitchenware. Having been particularly affected by the pandemic, Italy experienced a GDP drop of -8.8% in 2020. The country's imports were already in decline, before falling by an extraordinary -21% in 2020. Strong performance in 2021 and 2022 nevertheless led to an overall increase from €452 million in 2018 to €588 million in 2022. This translates to a CAGR of 6.8%.

Direct imports from developing countries made up about half of the market. They grew from €185 million in 2018 to €296 million in 2022. China (37% in 2022) is Italy's leading supplier. Other developing countries have increased their market shares as well, including Turkey (6.1%), Vietnam (2.1%), Bangladesh (1.5%) and Tunisia (0.7%).

Spain increases its imports despite economic struggles

Spain is the sixth-largest European import market for tableware and kitchenware. In 2020, the Spanish economy experienced the largest drop in Europe, with a decrease in GDP of -11%. A return to pre-pandemic levels is expected in the second half of 2023, making the Spanish economy the slowest to recover in Europe. Although this could obviously limit your opportunities in Spain for the coming years, the country's imports of tableware and kitchenware are performing well.

Imports grew from €320 million in 2018 to €467 million in 2022, with a CAGR of 9.9%. In 2022, 57% (€265 million) came directly from developing countries. This is slightly above the European average. China (45% in 2022) is Spain's leading supplier. Developing countries that have also increased their market shares include Turkey (6.7%), India (1.6%) and Bangladesh (0.8%).

Tip:

Do not restrict your focus to specific European countries. Instead, identify the appropriate market segment for your products, and have your buyers distribute your products across Europe within this segment.

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

The market for salad sets is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. Key topics include wellness and sustainability.

Wellness: slow and connected

Wellness is a dominant consumer trend. Today's consumers are actively in search of well-being, especially since [the COVID-19 pandemic has made consumers more acutely aware of the importance of both their mental and physical wellness](#). 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.

As a result of the pandemic, [people have been spending more time cooking and socialising as a family/household](#). Many expect this change to be permanent. Of those who started cooking more at the beginning of the pandemic, [65% were still doing so a year on](#). When imagining a post-pandemic future, [most consumers plan to do more cooking at home](#). Such a long-term increase could further boost consumer interest in salad bowls and servers, to help prepare meals and set a well-laid table that adds to the social character of the dinner.

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. In line with the trend of slow cooking and dining, this means that consumers are taking more time to sit and enjoy dinner. They are turning 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, in which people seek to develop their skill sets and 'social connection'. European consumers are rediscovering the joy of cooking and are 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 want to work with the same kitchenware as real chefs, making them slightly less price-sensitive and more sensitive to branding.

Made by hand

In slow dining, consumers take pride in their serveware. As a result, they focus more on design and slightly less on price. Such consumers prefer individual, seemingly one-of-a-kind pieces that have been handmade or hand-finished, to display their good taste.

Figure 5: Handmade and hand-decorated pottery from Tunisia

Source: [The Twinning Company @ YouTube](#)

Handmade salad sets form a niche in a kitchenware and serveware sector, where industrialised manufacturing is the norm. Salad sets that are fully or partly handmade start in the mid-high segment, and they can reach into the premium segment. Although 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 dinnerware and serveware market, you should follow trends in food, cooking and dining. You can do this by following food-oriented trade fairs (e.g. [Anuga](#) or [BIOFACH](#)), watching [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. Stories about the making and makers of products are popular amongst 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 means connecting, which is a basic principle of well-being.

Do not lacquer your woods. Work with natural materials, and use the original natural colours in your products. For preservation, light treatment with a vegetable oil or wax is often sufficient. 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 industry and consumers are becoming more concerned about the environmental and social effects of production and consumption. Social and environmental sustainability are quickly becoming central consumer needs, including with regard to HDHT. European consumers are increasingly adopting more sustainable lifestyles, and the COVID-19 pandemic boosted this trend. At the same time, the current cost-of-living crisis is driving a need for sustainable products to be affordable.

Especially for younger generations, [the pandemic has made it more important for consumers and companies to improve their sustainability](#). An impressive 86% of all European consumers consider sustainability important or very important, and 29% buy sustainable products deliberately and consciously. In addition, [most people would like to see significant changes to make the world fairer and more sustainable after COVID-19](#). Millennials and [Gen Z](#) people will soon be the dominant generation of consumers. They care about sustainability and express this by buying products (from companies) that contribute to a better world.

You can improve social and environmental practices in any aspect of the value chain of salad sets, regardless of the materials of which they are made:

- In the selection and use of raw materials
- In the production process
- In transport and distribution
- In helping consumers use your items longer
- In ensuring that the materials are recyclable or biodegradable at the end of the cycle

There is a real market for sustainable salad-set options, especially in the mid-high segment. The fair-trade market has traditionally been strong with regard to salad servers and bowls, which are often made by hand and from natural materials.

Natural materials like wood are increasingly popular, especially when combined with supreme craftsmanship. 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 middle to high-end market.

Tips:

Use sustainable solutions for raw materials, production, transport and distribution, consumer use and waste disposal.

If your importer is interested, consider certification options (e.g. fair trade or [BSCI](#) compliance). For more information on this, see our studies on [market entry for salad sets](#) and [buyer requirements for HDHT](#).

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

See our special study on [sustainability in HDHT](#) for more information, as well as our webinar on [sustainability in the European HDHT market](#).

A new appreciation of craftsmanship

Salad sets are no longer ‘anonymous’ tools for serving food. They have become eye-catching items on the table. This upgrade is closely connected to the trends of slow dining and wellness in general. Brands and designers are investing in sets that show craftsmanship and 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 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 make their own combinations, (e.g. a stainless-steel bowl with fine Olivewood servers). This trend is particularly strong amongst Millennials, who do not wish to follow traditional ‘norms’ in dinnerware (e.g. buying a complete set in a coherent style).

Tips:

If you offer sets, be aware that your bowls will have a much slower turnaround than your servers, which require continuous renewal. By contrast, a bowl can have a much more stable presence in your range of offerings. Salad bowls and servers are often offered as separate items. Consumers often have several pairs of servers, which 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 it is for bowls.

Offer choice, to allow consumers to develop their own, personal collections. Especially for servers, there is a wide range of possibilities in terms of design ideas, ranging from a focus on special materials to amazing artisanry, 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 company:

[Artesanías del Atlántico](#) from Colombia is a prime example of the vision that craftsmanship can be a source of sustainable economic development, as laid out by the Atlántico government. This is a government programme aiming to stimulate the creative industry in the region by offering artisans a comprehensive training programme that “allows them to create increasingly innovative, sustainable products with the best quality standards”.

Figure 6: Artesanías del Atlántico – Manifest

Source: [Artesanías del Atlántico @ YouTube](#)

The products are made with local raw materials and beautiful craftsmanship by artisans from 23 municipalities. For example, the handmade Campano wood bowl is given a touch of origin by adding a hand-carved version of the indigenous trinity flower to it. A similar idea is found in the wooden Hummingbird salad bowl that has a tiny wooden hummingbird sitting on its edge.

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

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