CBI Product Factsheet: Ceramic dinnerware in Europe

'Practical market insights into your product'

As European consumption of dinnerware is rising, this market offers opportunities to exporters in developing countries (DCs). Most opportunities can be found in the upper-mid to high-end market segments, where DC exporters can differentiate themselves from competitors. To add value to their products, DC exporters are recommended to focus on user moments, craftsmanship, storytelling and a clear picture of the end consumer.

Product definition

In the 'Dining' or 'Tableware' category a distinction is made between dinnerware, glassware or drinkware, cutlery and table linen. Dinnerware usually consists of mugs & cups, plates & platters, bowls, jugs, tea & coffee services, and other accessories, such as cake stands or sauce boats. Dinnerware can be sold as complete sets of 12 to 16 pieces including a dinner plate, side plate, bowl and mug or cup and saucer, or individually. Besides the consumer market, the hospitality market (hotels, catering establishments) represents a specific segment. It is dominated by well-known brands. Key features here include durability, functionality and price, but also the ability to add branding to the product, according to the importer's specifications.

Classifications for dinnerware can be found in Annex I.

A dinnerware setting

Source: Villeroy & Boch

Product specification

Quality in dinnerware relates primarily to the fact that ceramics come into contact with food, and as such have to adhere to strict health and safety requirements (see Requirements You Must Meet). Otherwise, quality aspects concern functionality, durability and aesthetics.

- **Functionality:** The type of dinnerware pieces displayed on the table differs according to the type of meal (breakfast or cooked dinner), the occasion (formal or informal dining), location (inside or outside, home or restaurant), or even culture (e.g. the British oversized tea mug or the Italian extended meal courses).
- **Durability:** Dinnerware will be used frequently, thus the sturdiness of the materials is critical. Durability and flexibility of the material usually refers to the ability to resist scratching, chipping, and breaking when dropped. It is also very important that the materials are dishwasher and microwave safe and resistant to degrading in the freezer, dishwasher and microwave. Dinnerware is subject to a far greater use intensity especially in catering environments. At the same time, handling in professional kitchens can be quite rough, which places a much greater demand on durability. In this market, high-fired dinnerware (bone china, porcelain or special

'Expressive' tableware

Source: Anthropologie

compositions) are 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.
- **Product design:** As the demand for more expressive tableware rises (see 'Trends'), individuality and the aesthetic quality of dinnerware have become a more central buying motive for consumers.

Labelling

- Information on the outer packaging of dinnerware should correspond to the packing list sent to the importer. External packaging labels for dinnerware 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

- Dinnerware should be packaged according to the importer's instructions. Every importer will have its own specific requirements related to the use of packaging materials, filling boxes, palletisation, and stowing containers. Always ask for the importer's order specifications, which are part of the purchase order.
- Properly packaging dinnerware can minimise the risk of breakage caused by shocks. The product's fragility determines the packaging of the products 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.
- 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 packing and logistical requirements already at the products' design stage
  - Asking their buyer for alternatives.

Example of consumer packaging

Source: Lovelypackage

Requirements you must meet

General product safety: the General Product Safety Directive applies to all consumer products. It states that all products marketed in the EU should be safe to use and forms a framework for all specific legislation on specific products and issues.

Food contact materials: Food safety is a major concern in the EU, and safety measures go further than the food itself, covering dishes and packaging that come into direct contact with food. Chemicals in ceramics and plastics, for instance, have been restricted. 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.

Food safety

Source: Toast UK

CFA[1]: 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.

Lead-free ceramics: Lead glazes can be used on a wide variety of ceramic ware, such as earthenware pottery, stoneware, and a range of porcelain type bodies. Though lead is widely used, it can be harmful as it can be absorbed by food substances.

CFA: 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 DC exporter to provide proof of compliance with legal requirements. You can read more about the General Product Safety Directive in the EU Export Helpdesk.

CFA: For a full overview of legislative requirements for dinnerware, please consult the EU Export Helpdesk.

CFA: 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.

REACH: the Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH) lists restricted chemicals in products that are marketed in the EU. In order to market your dinnerware on the EU market, you need to make sure that your products do not contain hazardous substances as defined by REACH.

CFA: For more information on the use and restrictions of chemicals on the EU market, please refer to Annex XVII of the REACH legislation EC Regulation 1907/2006.

CFA: For more information on buyer requirements for dinnerware, please refer to the CBI EU Buyer requirements for Home Decoration and Home Textiles.

Common requirements

Sustainability: Social and environmental sustainability offers 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.

[1] Consideration for action

- The Ethical Trading Initiative (ETI) is a code of conduct developed to improve the working lives of people across the globe who make or grow consumer goods. ETI is particularly common in the UK.
- 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.

CFA: You can expect compliance with the BSCI Code of Conduct to be considered as a basic requirement as an increasing number of European importers are participating in BSCI. You are advised to think ahead by performing a self-assessment, which is available at the BSCI website, because if you are far from complying with this initiative it can harm your position on the market.

CFA: 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 on in terms of sustainability.

CFA: For more information on sustainable design, please refer to CBI's Tailored intelligence: the Sustainable Design market for Home Decoration and Home Textiles.

CFA: For more information on sustainability, please refer to CBI Trends Special Sustainability for Home Decoration and Textiles.

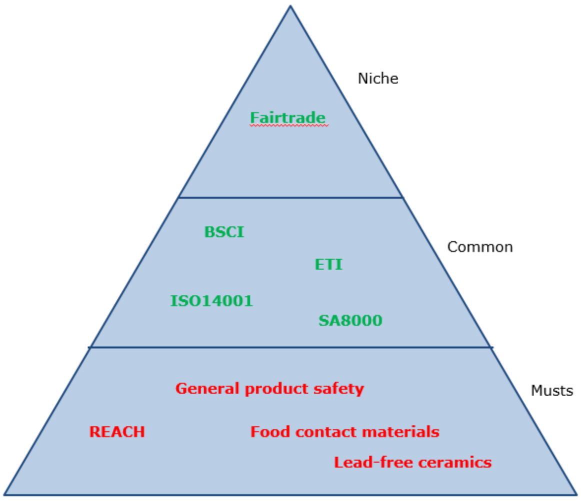
Niche requirements

Fairtrade products: Among the niche initiatives, the 'Fairtrade' 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 (including several sectors). Often, producers are assessed by shops (e.g. so called 'world shops') or brands (e.g. FairForward) rather than certification by the Fairtrade Labelling association (which may be interesting for Fairtrade certified cotton). These 'world shops' or brands often label their products with fair trade, which is not the same as Fairtrade certification.

CFA: Ask buyers exactly 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.

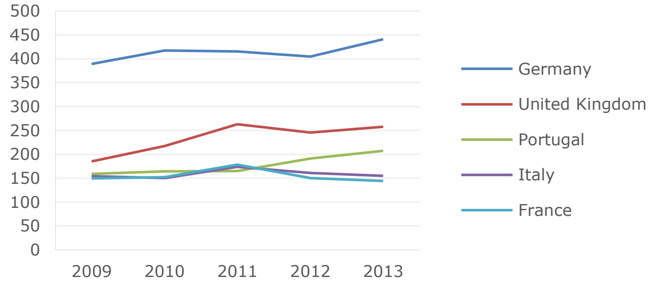
CFA: Please refer to the ITC Standards map database for more information on different voluntary standards and their requirements, including fair production.

Figure 1: Buyer requirements for dinnerware



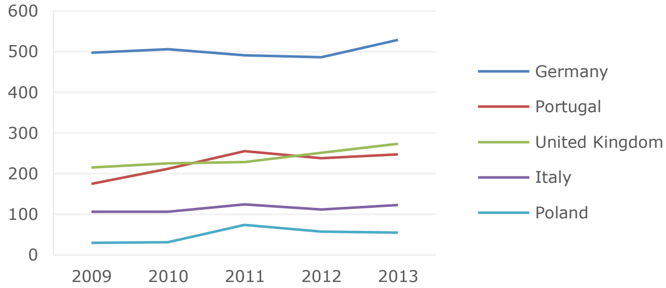
Trade and Macroeconomic Statistics

Figure 2: Leading producing countries of dinnerware in EU/EFTA, in € million



Source: Eurostat Prodcom (2014)

Figure 3: Leading consuming countries for dinnerware in EU/EFTA, in € million



Source: Eurostat Prodcom (2014)

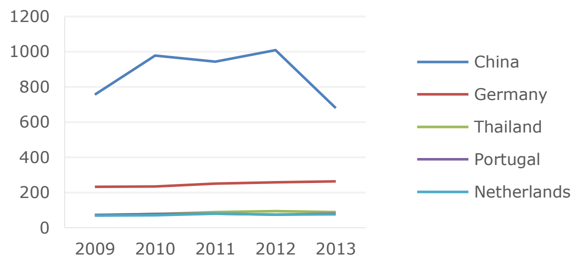
Between 2009 and 2013, **European production of dinnerware** increased significantly, amounting to € 1.5 billion in 2013. Overall, production has been increasing every year since 2009. During this period, Germany was the main European producer, with production amounting to €440 million, almost double the amount of the second producer, the United Kingdom.

CFA: Be aware that you can expect competition from European suppliers of dinnerware, most of which are located in Western Europe.

Total European consumption of dinnerware increased by 19% during the period 2009 and 2013, amounting to € 1.4 billion in 2013. European consumption has been increasing continuously since 2009, despite the effects of the economic crisis. The largest consuming country of dinnerware was Germany, followed by Portugal and the United Kingdom.

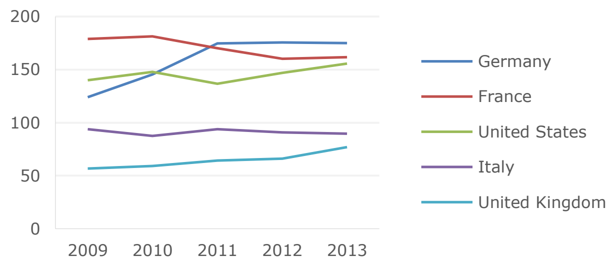
CFA: GDP & consumer confidence are expected to increase in 2014, as mentioned in the [CBI Trade Statistics for Home Decoration](). As GDP and consumer confidence grow, consumers are more willing to spend money on luxury items or gifts, which will affect consumption of ceramic dinnerware in a positive manner.

Figure 4: Leading suppliers of dinnerware to Europe, in € million



Source: Eurostat 2014

Figure 5: Leading export destinations of dinnerware, in € million



Source: Eurostat 2014

European imports of dinnerware increased slightly during the period between 2009 and 2013, amounting to almost € 2 billion in 2013. 47% of total imports were sourced from DCs. China has been the leading supplier for the last 4 years, accounting for almost 35% of total imports. However, the share of Chinese imports has decreased significantly, amounting to € 680 million, a 32% decrease compared to 2012. Due to this development, total imports from DCs have decreased, but this creates opportunities for other DC exporters who offer something different to the market.

CFA: Competition from developing countries has been significant for dinnerware imports. However, the considerable decrease of imports from China will create opportunities for DC exporters. Make sure that you stand out from the crowd by offering added value, i.e. craftsmanship and handmade products.

Between 2009 and 2013, **European exports of dinnerware** grew by 4% per year, amounting to € 1.7 billion in 2013. The main destinations were Western European markets as well as the United States. However, there is an increasing trend in exports to the major export destinations, such as Germany, the UK and Belgium, while exports to France and Italy stabilised. Nevertheless, there was an increase in exports to Russia, amounting to an 18% increase annually.

Market trends

In the European market for dinnerware, different trends are prevalent amongst consumers. Changed eating habits are influencing dinnerware consumption in different directions. Other vital trends in dinnerware include individualisation, handmade, brand stories and sustainability.

Source: Mateus

Changing eating culture: social and casual dining

Social dining

Northern European countries are increasingly developing a table culture, originating from Southern influences such as French cuisine or the Italian food culture, or even from ‘exotic’ sources (e.g. Moroccan, Japanese). This means consumers are taking more time to sit and enjoy dinner, making it a social event with family and friends, and laying the table with their best tableware. As such, the consumer is no longer afraid to invest in dinnerware which gives aesthetic pleasure when used, and reflects one’s taste and pride.

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 given rise to '*casual dining*', the trend that demonstrates 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) or eating out (at fast-food sources).

CFA: Find out about your target segment's dining culture. 'Social dining' 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 those exclusively fish or exotic dinners, is different and creates a talking point. Consequently, this dinnerware will be slightly less price-sensitive, might be branded, and will be purchased in department stores or kitchen specialists.
- The 'casual diners' will favour more everyday, functional ceramics, which are affordable and sourced from nearby supermarkets and convenience stores.

CFA: 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.

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. For example, the renewed interest in nutrition and health, with the related preference for cooking a fresh meal on the spot with fresh ingredients. This is also stimulated by the '*slow food movement*' with its emphasis on being conscious of what you eat, on 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, and as such the art of home cooking has taken off too. These new 'foodies' and 'masterchefs' require some good cooking tools as well as a receptive dinner environment, with quality dinnerware.

Masterchef

Source: John Lewis

CFA: The masterchef's need to display and share the cooking experience necessitates oven-to-table dinnerware: items used for preparing the food (e.g. casserole or bakeware) and that are sufficiently decorative to put on the table. This has increased the design aspect of serveware and still allows ample room for improving aesthetic quality.

CFA: Overall, the European emerging markets (esp. Eastern Europe) have a different segmentation from the mature markets (Germany, France, the UK, the Netherlands, Belgium, Italy, Spain and Scandinavia). Emerging-market consumers have less disposable income for interior products and dinnerware; they will be more price-conscious, have less experience in comparing offers from different segments (in design, functional quality and brands). Therefore, they will not be easily enticed to pay a price premium. For that reason, the lower segments dominate the emerging European markets, while different dinnerware segments (low, mid and high-end) are found in the mature markets. This is something to anticipate in your geographical segmentation.

Personalisation/individualisation
As the European consumer has become more mature, dinnerware has become more personal, more individual and increasingly a status purchase. This has sparked a few trends in dinnerware that are common to home decoration generally, notably 'comprehensive consumption' and 'handmade'.

Mix and Match

Source: Elle Decoration UK

- **Comprehensive consumption: mix and match**

Rather than buying a traditional matching dinnerware set (from a heritage brand) and treasuring it for life, the new consumer creates an eclectic dinnerware group from various sources (even combining newly-bought pieces with flea-market finds), in various designs and in which individual pieces may be replaced at will. This allows the consumer to be different and cater to the particular feeling of the moment.

CFA: create collections that offer the opportunity to mix and match, by offering a wide colour palette, shapes and decorations, or styles that can be combined. This can be a format for all market segments.

CFA: offer replacement opportunities by bringing out new lines which can fit into or replace older collections.

CFA: bring out new lines more often than twice a year, to create faster turnaround and more contemporary product ranges. This may also stimulate the consumer's desire to start collecting – another relevant trend in home decoration and dinnerware.

- **Handmade preference**
  'Craft' or handmade products have become popular again, especially amongst mature consumers in a saturated market, who are tired of standard, industrially-manufactured wares and opt for individual, personal pieces that have been handmade or hand-finished. It is the consumer's way of displaying individual, discerning taste. Also, the 'new-foodie' or 'masterchef' consumer will also tend to demonstrate a preference for handmade products.

Handmade

Source: Wurtz Denmark

CFA: 'Craft' pottery techniques, ranging from hand-throwing to hand-decorating can be an option for exporters in developing countries looking for segments that may be niche but premium. The 'maker' stories and individualised output are appreciated by a discerning consumer looking for a personalised purchase.

Industry changes: the old and the new
Europe has a long tradition in ceramics, in different parts of the continent: the UK, Germany, France and Italy, with some manufacturers dating back to the 18th century. Heritage brand stories (Wedgwood, Meissen, Sèvres, Ginori) still dominate the scene, especially in luxury ceramics.

Traditional vs new

Source: Mud Australia

At the same time, new brand stories are emerging (e.g. Mud Australia, 1994; JIA Inc., Hong Kong, 2006), which European consumers are willing to embrace because of their craftsmanship, their authentic style and refreshing way of communicating. On the other hand the dinnerware category is being renewed: existing wholesalers and brands in home decoration in general are discovering tableware's gift and expressive value and are now also offering dinnerware. Mud Australia e.g. stains its porcelain instead of using coloured glazes.

CFA: The consumer is open to new entrants to the dinnerware arena. New directions in material use and techniques, new stories and origins, offer new perspectives for exporters in developing countries, either as a supplier to new Western brands, or individually, as a small but different brand producer. The latter, however, requires far greater sustained effort and resources than the former approach.

Sustainability

Source: Wasara

Sustainability
As consumers are becoming more aware of and susceptible to the environmental and social implications of their consumption patterns, sustainable options in the market are becoming more relevant. As 'value-for-money' is the main buying motive in most segments in this category, consumers will not automatically pay a price premium for sustainable options, unless the design is premium too.

CFA: Consider the extent to which you can add value through a positive social or environmental impact in your process: from raw materials, production, transport and distribution, consumer use and disposal. Communicate your sustainable values through your marketing communication and/or by applying for certification.

CFA: CBI offers sustainable design training, which may be of interest to you. Refer to their website for more information.

CFA: Refer to CBI Trends Special Sustainability in the home sector for more information on sustainability.

Market Channels and Segments

Market channels

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

In Europe, all major retailers and department stores have online business-to-consumer platforms.

CFA: 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. Refer to CBI Trend Special E-commerce in the 21st century for more information.

CFA: Dinnerware 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, price elements, with a corresponding communication strategy and the right choice of distributor. If you have your own 4Ps (product, price, place and promotion) in order, sourcing and connecting to distributors will be more effective.

Market segments

The EU dinnerware market is a mature and highly segmented market. There are broad and deep low, mid and high-end market segments, which can be subdivided into even more sub-segments based on differentiating propositions. This may make it the most challenging home decoration category of all, as a variety of propositions have already been tried, but also the most inviting, as anything is still possible and the consumer is open to change.
The characteristics of the main segments are:

- Low-end market: everyday basics in dinnerware: functional, comfortable design, easy to replace. The consumer is not very focused on the product and considers it a convenience good: low price or bargain, bought around the corner and without consuming much time, e.g. in supermarkets or online.
- Mid-end market: Products are more trendy, but are still of a standardised form. There is limited attention to new innovative shapes or handmade effects, mainly sold at general interior stores and mid-segment department stores, at reasonable prices. Sometimes, dinnerware sales in

this segment are stimulated by the endorsement of a celebrity (such as a TV cook).
- High-end/premium market: Design, craftsmanship and brand names are the main sales arguments. Available in department stores and brand stores.

Besides the consumer market, the hospitality market (hotels, catering) represents a specific segment. Key features here include durability, functionality and price, but also the ability to add branding to the product, according to the importer's or retailer's specifications.

Table 1: Market segments of dinnerware

	Low-end: Convenience, low price, easy to replace	**Mid-end: Trendy, standard forms**	**High-end: Design, decoration, brands**
16-piece set	 *Source: Creative Tops*	 *Source: Crate & Barrel*	 *Source: Gordon Ramsay*
5-piece place setting	 *Source: Mikasa Orchid Shimmer*	 *Source: Vera Wuang-Flirt*	 *Source: Lenox Independence*
Salad bowl *(e.g. of dinnerware, not included in sets)*	 *Source: Ikea.nl*	 *Source: Denby.co.uk*	 *Source: Chinacraft London*

Prices

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

Table 2: Indicative consumer prices of dinnerware

Dinnerware	Low-end	Middle	High-end
16-piece set	€ 11.00-35.00	€ 64.00-81.00	€ 145.00 or more
5-piece place setting	€ 20.00-30.00	€ 30.00-62.00	€ 115.00 or more
Salad bowl	€ 4.00-25.00	€ 43.00-66.00	€ 87.00 or more

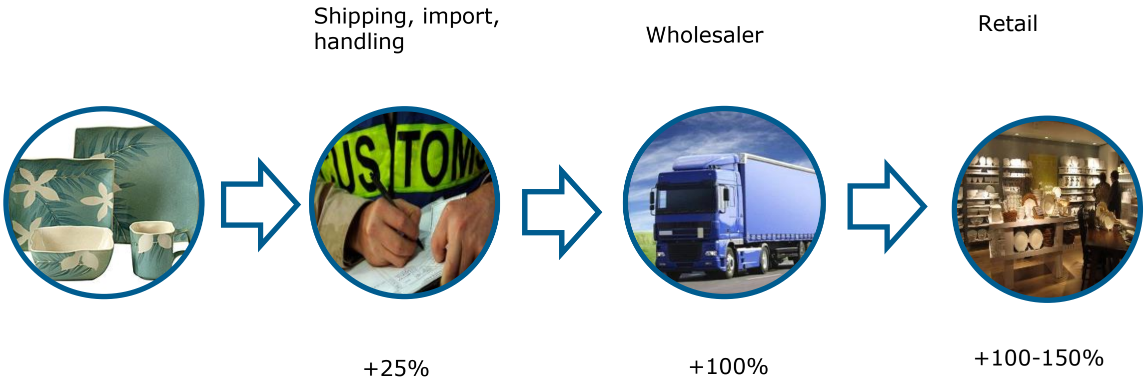
CFA: Pricing is determined by the value perception of your product in the chosen segment (see 'Market segments'). Once you have chosen your target segment, you must offer what is expected in the segment in terms of the quality of your dinnerware, at a price that matches similar products. To determine 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.

CFA: Understand your segment and offer the 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 dinnerware in the supply chain, which will not differ essentially from dinnerware in general.

Figure 6: Indicative price breakdown for dinnerware, markups in %



Source: ProFound, 2014

Agents, if they are involved, they typically receive a commission amounting to a few (2-5) percent. However, their actual profit margin highly depends on the volumes sold and gross margins. They will normally lower their gross margin for large volumes.

CFA: Agents are particularly interesting if you do not have a strong sales network. You can look for commercial agents on the Internationally United Commercial Agents and Brokers (IUCAB) website.

Field of Competition

Please refer to CBI Home Decoration Field of Competition, as the competitive field for dinnerware does not differ significantly from this general overview.

Useful sources

- Aid to Artisans, International Non-profit Organisation for the craft sector
- EFTA, European Fair Trade Organisation
- WFTO, World Fair Trade Organisation
- 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 dinnerware are:

- Maison et Objet, every January and September in Paris, France
- Ambiente, February in Frankfurt, Germany
- Tendence, August 2014 in Frankfurt, Germany

This survey was compiled for CBI by ProFound – Advisers In Development, in collaboration with

CBI sector expert Kees Bronk, GO! GoodOpportunity.

Annex I: Classification of dinnerware

- **Harmonised System (HS)**: the following HS codes are used for trade in dinnerware within the EU / EFTA:
  - 6911.1000: Tableware and kitchenware, of porcelain or china (excl. 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: Tableware, kitchenware, other household articles and toilet articles, of common pottery (excl. 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: Tableware, kitchenware, other household articles and toilet articles, of stoneware (excl. 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: Tableware, kitchenware, other household articles and toilet articles, of earthenware or fine pottery (excl. 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).

- **Prodcom:** the following Prodcom codes are used to indicate European dinnerware production:
  - 2341.1130: Porcelain or china tableware and kitchenware (excluding electro-thermic apparatus, coffee or spice mills with metal working parts
  - 2341.1210: Ceramic tableware, other household articles: common pottery
  - 2341.1230: Ceramic tableware, other household articles: stoneware
  - 2341.1250: Ceramic tableware, other households: earthenware or fine pottery

This product factsheet focuses on ceramic dinnerware, as these materials offer more opportunities for producers from developing countries. Note that cutlery and glassware is not included in this product factsheet analysis. For information on these products, please refer to CBI Product Factsheet Glassware in Europe and CBI Product Factsheet Cutlery in Europe. For information on tea sets as well as wooden salad sets, please refer to CBI Product Factsheet Tea Sets in Europe and CBI Product Factsheet Salad Sets.