Tableware, kitchenware and household articles of wood, metals, glass and plastics

A SURVEY OF THE NETHERLANDS
AND OTHER SELECTED MARKETS IN THE EUROPEAN UNION

Centre for the Promotion of Imports from developing countries

TABLEWARE, KITCHENWARE AND HOUSEHOLD ARTICLES OF WOOD, METALS, GLASS AND PLASTIC

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DISCLAIMER

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CONTENTS

REPORT SUMMARY

This survey profiles the Netherlands market and other selected markets in the European Union for tableware, kitchenware and household articles of wood, metals, glass and plastics. Tableware, kitchenware and household articles are termed in this survey as housewares. This term is used to describe articles from different categories under one heading. Housewares can be broken down into five groups based largely on the materials used in their production:

- metalware
- glassware (including crystal)
- ceramicware (including earthenware and porcelain)
- plasticware
- woodware

The term “cutlery” is used in this survey to refer to such articles as knives, spoons, forks, blades, ladles, skimmers, cake-servers, etc.

Consumption
In 1998, the EU consumption of glassware, ceramicware, plasticware and cutlery amounted to US$ 12 billion. The leading consumers were Germany, France, Italy and the UK.
The total value of the Netherlands market for housewares grew by 5 percent from 1997 to 1998. Consumption of glassware and ceramicware increased by 8 percent in 1998 and of other household articles by 4 percent. In general, increases in the consumption of housewares is mainly a result of increases in price.

Hectic life styles create a demand for functional housewares which save time and offer great convenience. Today’s consumer has an increasing preference for quality goods and this may be to the advantage of the sales of branded goods.

There is an increase in the sales of professional articles to the ordinary consumer.
Men spend more time cooking than in the past and they are interested in more professional cookware.
Colour co-ordination will continue to dictate consumer choice. Moreover, manufacturers will have to adapt to the ageing population by producing ergonomically designed articles.

The environment has become an important issue to the consumer. There is a preference for traditional materials, such as earthenware. Moreover, there seems to be a tendency to replace plastic by wood. Sales of wooden products are limited since they are more highly priced than plastics.

Production
The housewares industry is dominated by prestigious European brands world wide.
The market is quite fragmented, with only a few manufacturers playing an important role in one sector only. However, mergers and the acquisition of overseas manufacturers, as well as joint ventures, bring some consolidation. Production of housewares in

The Netherlands is relatively limited, with the exception of a few large manufacturers of plasticware, like Curver which is the second largest of its kind in the world.

Imports

In 1997, imports of housewares into the EU amounted to US$ 7 billion, reflecting a small decrease of 1 percent over 1996. However, imports of housewares into the UK, Austria, Ireland and France increased. The major importer within the EU was Germany, accounting for 24 percent of total EU imports in terms of value, followed by the UK, France, Italy and The Netherlands. Metalware, particularly of iron and steel, was the leading imported product group into the EU, followed by plastic housewares.

Between 1996 and 1997, total imports into The Netherlands dropped by 2 percent. Most of the imports originated in other EU countries, particularly in Germany. The most significant categories of imports into The Netherlands were housewares of plastic and metalwares (especially iron or steel), followed by glassware and ceramics.

In 1997, the role of developing countries in supplying the EU was substantial as they contributed 22 percent of total imports. Supplies were dominated by China, followed at a considerable distance by Thailand. The key product group supplied by developing countries was metalware, particularly copperware, accounting for 63 percent of total EU imports of housewares in 1997.

Total imports from developing countries into The Netherlands were about US$ 145 million in 1997, of which 33 percent consisted of metalware, 23 percent of cutlery and 22 percent of ceramic housewares. China was the leading developing country supplier, followed by Thailand and Turkey.

East European countries such as Poland, Romania, the Czech Republic and Hungary are beginning to make inroads into the West European market. These countries are competitors of developing countries particularly in glassware and ceramicware. Producers from Far Eastern countries continue to penetrate the Netherlands market. Although the emphasis still lies on cheaper products, exporters from this region are now also successfully entering the middle market level with their products.

Exports

In 1997, the EU exported US$ 9 billion and was a net exporter of housewares. Leading EU exporters were France and Italy, accounting for 40 percent of total exports. Glassware, the leading exported product group, was followed by metalware and ceramicware.
In contrast to the EU overall, The Netherlands was a net importer. Total Netherlands exports of housewares amounted to US$ 388 million in 1997, of which 82 percent was destined for other EU markets, reflecting the importance of The Netherlands as a gateway to Europe. Plasticware was the leading product group, followed by metalware.

Access to the EU

Exporters must ensure that the European standards (quality and grading) and requirements (packaging, marking and labelling) are met. Great care should especially be given to the packaging of fragile and vulnerable items. Furthermore, packaging should be attractive and also adapted to the demands of the importers or retailers.

The EU applies the Common Customs Tariffs to imports from non EU-sources. Imports of housewares from developing countries are generally covered by the Renewed Generalised System of Preferences (RGSP) and can be imported at a zero or reduced tariff. However, for some housewares originating in specific countries these preferential tariffs are being decreased or have already been completely abolished.

1 INTRODUCTION

This survey analyses the Netherlands and other selected markets in the European Union for tableware, kitchenware, and household articles of wood, metals, glass and plastic.

The report describes the key characteristics and trends in demand created both by the domestic consumer market and by the Netherlands and European trade in this product sector. The import and export trade are examined with greater focus on the import trade and the major sources of imports, particularly developing countries. The report is divided into five chapters and structured as follows:

Chapter two deals with the major product characteristics. It focuses on the different tableware and kitchenware products and their characteristics.

Chapter three outlines the Netherlands market for tableware, kitchenware, and household articles of wood, metals, glass and plastic. Attention is given to demand and supply, trends, import and export figures for tableware, kitchenware, and household articles of wood, metals, glass and plastic, and the role of developing countries in the trade of these products in The Netherlands. Furthermore, the trade structure is described: the infrastructure of importers and exporters and the retail trade. This chapter ends with a description of the prices and margins in the sector.

In Chapter four, a description is given of the European Union market for tableware, kitchenware, and household articles of wood, metals, glass and plastic and the characteristics of the main national markets.

Background information on quality and packaging standards, market access (customs duties, environmental regulations, etc.), terms of trade and promotion is provided in Chapter five. This final chapter ends with a checklist so that (potential) exporters can review the most important topics.

On 1 January 1999, the euro (EUR) became the legal currency within eleven EU member states participating in the euro area: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Their national currencies have become subdivisions of the euro, but will continue to circulate as legal tender until 2002. Circulation of euro coins and banknotes begins on 1 January 2002 and will gradually replace national currency notes and coins, which must be withdrawn by 1 July 2002 at the latest. Banking is already possible both in euro and national currency.

The most recent Eurostat trade statistics described in this survey date from 1998. In that year, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euro on a 1:1 exchange rate. In October 1999, the EUR / US$ exchange rate stood at US$ 1.05 for one euro.

In this market survey, the US$ is the basic currency used to indicate values. Values dating after 1 January 1999 are also expressed in euro.

Exchange rates of EU currencies in US$

Country	Currency	1994	1995	1996	1997	1998	October 1999
EU	ECU	1.18	1.29	1.25	1.13	1.12	–
	EUR	–	–	–	–	–	1.05
Austria	Ash	0.09	0.10	0.09	0.08	0.08	0.08
Belgium	Bfr	0.03	0.03	0.03	0.03	0.03	0.03
Denmark	Dkr	0.16	0.18	0.17	0.15	0.15	0.14
France	Ffr	0.18	0.20	0.20	0.17	0.17	0.16
Finland	FM	0.19	0.23	0.22	0.19	0.19	0.18
Germany	DM	0.62	0.70	0.66	0.58	0.57	0.53
Greece	GRD (100)	0.41	0.43	0.41	0.36	0.34	0.32
Ireland	I£	1.49	1.60	1.60	1.52	1.42	1.33
Italy	L (10,000)	6.20	6.13	6.47	5.88	5.77	5.39
Netherlands	NLG	0.55	0.62	0.59	0.51	0.51	0.47
Portugal	Esc (100)	0.60	0.67	0.65	0.57	0.56	0.52
Spain	Ptas (100)	0.75	0.80	0.79	0.68	0.67	0.63
Sweden	Skr	0.13	0.14	0.15	0.13	0.13	0.12
UK	GB£	1.53	1.57	1.56	1.64	1.66	1.64

Source: CBS Statline (November 1999)

A note has to be made with respect to the use and interpretation of the trade figures.
Since the establishment of the single market on 1 January 1993, the collection of data regarding trade flows has become more difficult. Before the establishment of the single market, trade was registered through compulsory customs procedures at border crossings. Due to the removal of the intra-EU borders, this is no longer the case. Therefore, statistical bodies like Eurostat can no longer depend on the automatic generation of trade figures.
In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms, whose trade exceeds a certain value annually. This threshold varies considerably per country, but on average it amounts to about US$ 100,000.
As a consequence, trade within the EU is generally underestimate and one must, therefore, be careful when interpreting statistical information.

2 PRODUCT CHARACTERISTICS

2.1 Product groups

This report analyses the market for the tableware, kitchenware, and household articles of wood, metals, glass and plastic traded within The Netherlands and the European Union market. Tableware, kitchenware and household articles are termed in this survey as housewares. Housewares can be broken down into five groups based largely on the material used in their production.

Housewares include tableware, kitchenware and household articles made of the following materials:	
	Referred to as:
• **metal**	Metalware
• **glass**	Glassware (including crystal)
• **ceramic**	Ceramicware (including earthenware and porcelain)
• **plastic**	Plasticware
• **wood**	Woodware

The term “cutlery” is used in this survey to refer to such articles as knives, spoons, forks, blades, ladles, skimmers, cake-servers, etc.
It should be noted that this market survey does not include small domestic electrical appliances. These products are analysed in CBI’s survey *“Household and kitchen electrical appliances”*.

2.2 Customs/statistical product classification

On 1 January 1988, a unified coding system was introduced to harmonise the trading classification systems used world-wide and to allow for improved international comparability of foreign trade statistics. This system is called the Harmonised Commodity Description System (HS).

Table 2.1 presents a list of the main HS codes for tableware, kitchenware and household articles. The varieties of tableware, kitchenware and household articles discussed in this report are covered by the Chapters 39, 44, 69, 70, 73, 74, 76 and 82 of the Harmonised System. The main categories used in the report are:

Table 2.1 HS code classification of tableware, kitchenware, and household articles of wood, metals, glass and plastic

HS codes	Product group
39 24	Tableware, kitchenware, other household articles and toilet articles of plastics
44 19	Tableware and kitchenware of wood
69 11	Tableware, kitchenware, other household articles and toilet articles of porcelain or china
70 13	Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes
73 23	Table, kitchen or other household articles and parts thereof, of iron or steel
74 18	Table, kitchen or other household articles and parts thereof, of copper
76 15	Table, kitchen or other household articles and parts thereof, of aluminium
82 11	Knives with cutting blades, serrated or not (including pruning knives), and blades thereof
82 15	Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware

For a more detailed of product groups list, please refer to Appendix 1.

3 THE NETHERLANDS MARKET

3.1 Consumption

3.1.1 Market size

In 1998, the total value of the Netherlands market for tableware, kitchenware, household articles of wood, metal, glass and plastic was estimated to be about NLG 4.2 billion (US$ 2.1 billion), indicating a growth of 5 percent compared to the previous year. The number of items which fall in these categories is vast, making it impossible to discuss each item individually. Current information about the total size of the market, as well as of the size of the different categories, is therefore only available to a limited extent.

A survey concluded by the EIM in 1999, gives an indication of total consumer spending and its breakdown into key categories. In 1998, NLG 269 (US$ 135) per capita were spent on housewares. Table 3.1 presents figures on consumer spending on housewares for three main categories.

Table 3.1 Netherlands consumer spending on housewares, 1998

Category	Total (US$ million)	Per capita (US$)
Glassware and ceramicware	624	50
Metalware	948	60
Other household articles	527	33

Source: EIM (1999)

Consumption of glassware and ceramicware increased by 8 percent in 1998 and the consumption of other household articles by 4 percent. In prosperous times, consumers are more prepared to spend on luxury and durable goods.

On the basis of its research and the figures in Table 3.2, EIM concludes that increases in the overall consumption of housewares are mainly a result of price increases. Increases in consumption of glassware and ceramicware are mainly due to increases in volume.

Table 3.2 Netherlands growth in consumption of housewares (index 1993 = 100), 1993-1998

	1993	1994	1995	1996	1997	1998
Glass and ceramicware						
value	100	99	100	102	102	110
price	100	97	95	98	97	99
volume	100	103	105	104	106	112
Metalware						
value	100	99	101	104	108	112
price	100	102	104	104	107	109
volume	100	97	97	101	101	103
Other household articles						
value	100	106	111	111	114	117
price	100	105	109	109	111	113
volume	100	101	101	101	102	104

Source: EIM (1999)

3.1.2 Market segmentation

Consumers in The Netherlands are no longer automatically prepared to buy more and/or to purchase more exclusive goods like gourmet food, household equipment, furniture and so on. It has become increasingly difficult to try and predict consumer behaviour. The modern consumer can no longer be clearly defined. One day he/she may be a mass consumer purchasing products without any involvement whatsoever at a discount chain store, while the next day he/she is the individual consumer looking for a high degree of involvement in a specialty store.

Consumers have come to realise that their houses have become quite full with products more or less pressed on them by the aggressive advertising campaigns of eager manufacturers, aiming to increase their market share without looking at the real interest of the consumer. This may be the beginning of a trend, where "less is more", implying that consumers are becoming tired of the abundance of articles they can buy and are satisfying themselves with the "basic necessities" of life.

Each target group is becoming smaller. However, the total number of different groups is increasing, resulting in many different styles and trends being fashionable at the same time. This has a negative effect on distribution and its costs. Mega stores with an enormous and varied assortment, thus supplying the widest possible range of target groups, see their margins under strong pressure. Mail-order companies, which have always invested large sums of money in order to have access to highly individualised data bases, can succeed by exploiting their strengths in making one-to-one offers (advertisements of suitable products to a limited number of people).

- **Older people vs younger people**

The increase in the number of older people has caused a change in consumer spending. Older people need more services, while younger people need more goods. Therefore, only product of original design, preferably functional and made of high quality materials with a perfect finish can be succesful in the segment of older consumers. Children have become an interesting market segment too and character merchandising is now a popular feature both in the ceramic and plasticware sector.

The number of marriages has a major impact on sales of such items as crystalware, dinner services and silverware. Today, marriages are tending to be luxurious and this has a positive effect on sales of housewares.

Shopping is purely a necessary functional activity but is considered fun, especially by young people. Research shows that 40 percent of the Netherlands youth goes on a weekly window shopping tour. However, as they grow older the urge to shop decreases.
A consequence of the fun approach to shopping is that young people expect shops to be open at hours which are convenient to them, i.e. in evenings and weekends. The image and the ambiance radiating from a retail store are the main influence on young people's decisions to enter stores. to enter, "yes" or "no". Innovative products with a fashionable design are essential in order to create sales.

- **Foreign nationals**

The number of foreign nationals in the Netherlands continue to increase. The number of Turkish people, currently some 300,000, is expected to grow to 750,000 over the next 15 years. In 2005, it is estimated that 13 percent of the Netherlands population will be foreigners. This group of consumers has a different spending pattern. Special dishes for exotic food can be sold by stores in order to target these consumers.

- **Number of household**

The average household size continues to decrease and is expected to number only 2.2 persons in the year 2015. Combined with an increase in the total population, this means more potential sales for the mixed sector (retail shops, mostly chain stores, selling a wide range of products). It is also expected that the number of households with double incomes will increase. Time is a highly valued commodity for these households and they are continuously looking for products to make their busy lives more comfortable. Key words are: *convenience, speed, quality* and *made-to-measure*. Price to them is no longer a crucial factor. The attractiveness of the complete product is all that counts.

3.1.3 Consumption patterns and trends

Housewares

The major factors affecting the current state of the housewares market in The Netherlands are:

- Hectic life styles create a demand for functional housewares, which save time and offer great convenience. Today's consumer has an increasing preference for quality goods and this may be to the advantage of the sales of branded goods.

- The most important influence on purchasing is the need to replace of old housewares, especially when it comes to cooking, frying and baking.

- There is an increase in the sales of professional articles to the ordinary consumer. Men are spending more time cooking than in the past and they are interested in more professional cookware.

- Colour co-ordination will continue to dictate consumer choice. Manufacturers will have to adapt to the ageing population by producing ergonomically designed articles.

- Consumers are interested in pots and pans with a lid of heat-proof glass, which makes it easier to keep an eye on the cooking. Moreover, in The Netherlands more than 64 percent of the household puts the pans on the table during the meal. This requires better designed pans and, as a consequence, the sales of serving dishes and sauce-boats may decrease.

- The environment has become an important issue to the consumer. There is a preference for traditional materials, such as earthenware. Moreover, although woodware is higher priced than plasticware, there seems to be a tendency to replace plastic by wood, which results in limitation of sales of wooden products.

- The fact that spending on food products is no longer increasing does not mean that the consumer is not interested in food and its preparation. On the contrary, the number of cooking classes has dramatically increased in recent years and the ambiance of the more expensive restaurants is imitated when enjoying home-cooked meals.
  An example is that people drink less coffee: consumption declined from 170 litres in 1994 to 160 litres in 1998 (apart from the Scandinavian countries the Netherlands still consume more per head than the other EU countries). However, the sales of espresso machines have increased over the same period. Furthermore, there is a clear influence from more exotic dishes, partly due to tourism, but also to better availability of foreign spices, herbs etc. "West meets East" is getting a wider meaning and trends like Zen and Feng-Shui are being translated into the preparation and serving of food, demanding a whole new range of dinner and cookware.

- It is expected that the middle price segment will sharply decrease in the coming years. This is partly due to the fact that consumers either have the money and interest to buy in the higher price range, or they want to get everyday products as cheaply as possible. People find it a challenge to buy useful products for as little money as possible.

- **Housewares brands**

Netherlands consumer are generally not very familiar with the different brands of housewares. Moreover, a large group of people do not believe that a famous brand automatically means better quality. The average consumer in the Netherlands, is not well informed about the different brands of dinner services and cutlery. The exception is Wedgwood which is known by almost half of the buyers, followed at a distance by Villeroy & Boch (21%), Arzberg (9%), Royal Albert (9%) and Rosenthal (6%).

With regard to cookware the consumer knows only two brands: BK, the brand leader with 62 percent of the market and Tefal with 48 percent. The buyers of general housewares are most familiar with Brabantia (47%) and Curver (35%).

Ceramicware

The market for ceramicware has changed dramatically in recent years. Where in the recent past the famous brands signified quality, exclusivity and style to the consumer, it has now become important to offer something beautiful, well designed and matching the prevailing style of fashion. An important segment is that of the young people getting married. These couples usually buy the so-called "starter set" which includes 6 plates each for dinner, soup and breakfast. This set is gradually expanded by gifts on the occasion of the wedding (marriage list) and by purchases on special occasions over the years. Consumers expect that these brands guarantee the availability of their products for a long period of time (10 years).

Tableware follows the general trend in home decoration. Fashionable colours at the moment are blue, green and orange and there are also complete lines in white. Popular characters are frequently used for decoration of inexpensive and medium priced ceramicware. A trend to use a particular season (spring, autumn) or event (Christmas, Easter) as decoration has been evident since the early nineties. This is a consequence of consumer demand, which has become “event-oriented” and can even include events like the Asparagus season, with specially designed dishes for the occasion. Animals and flowers have remained popular decoration throughout the years. At present an “Asian” trend can be observed as well. Today’s consumers combine different brands and styles in order to create a special effect. These effects depend on the occasion and the type of food being served. As a consequence manufacturers have to come up with new colours, designs and styles more often. The advantage for manufacturers is that it is no longer necessary to produce complete services of every new trend. They can start with production of plates and cups and saucers and, if these prove successful, extension of the range can be considered.

The progressive individualisation of society necessitates an increasing number of different styles and colours, all at the same time. Earlier in this decade, five major trends were distinguished, while this number has now increased to ten. These trends of *Classic* (traditional), *Timeless* (elegant), *Simple, plain, clean* (functional), *Cheerful* (cosy) and *Fashionable design* (decorative) continue to be important.

It is difficult to identify consumer types because of the combination of extremes applying to one and the same consumer, who shops one day for pleasure and purchases luxury goods in specialty stores, while the next day he orders cheap practical products by mail-order.

Convenience has become one of the essential features for the modern consumer. Therefore, it is essential that manufacturers try to come up with practical solutions in their products. Products with rounded corners (easier to wash) and fewer sharp edges are important for use in the dishwasher. Moreover, consumers expect ceramicware to be microwave-safe.

The “natural” trend has increased the demand for products of earthenware. Special attention should be given to the professional users of these products. Purchases in this sector are estimated at a value of more than NLG 125 million (US$ 65 million) annually. More durable items are used in this sector. Essential qualities of the products are: easy to stack, not easily breakable, durable and dishwasher-proof. A differentiation can be made within the sector between (A) institutions, and (B) hotels and restaurants. For category B, the look of tableware is much more important than for category A.

Hotels and restaurants in the top segment of the market (high prices) often use a famous brand, which matches their exclusive image. This fact may help to stimulate sales of these brands when consumers try to imitate the style and atmosphere of these restaurants in their homes to entertain friends.

Glassware

Although spending on glassware increased by 8 percent between 1997 and 1998, Netherlands consumers are not big spenders on glassware compared to other European countries. However, a trend is noticeable which clearly shows that the market for luxury glasses in the Netherlands is growing. The same is true for coloured and decorated glassware which is in high demand. Consumers have found that glasses are perfectly suited for colourful accents on traditionally laid tables.

The market for glassware is fragmented: it includes both industrially produced and hand made glass and crystal. Two different markets can be distinguished: that of high quality crystalware (including goblets and ornaments) and that of everyday glassware, which includes drinking glasses and glass cookware and tableware.

Glass has rapidly increased its share in the overall market for standard, everyday glassware. One of the reasons for its success is that although glass is easily broken and, therefore, quite often replaced by consumers, it also benefits from low prices compared to other types of crockery. Moreover, glassware can be used without difficulty in a microwave oven and colours and designs can be adapted relatively easily to the rapid changes in today's market. The consumer's interest in glass and vitro ceramic ovenware is growing because of the trend towards microwave cooking. Easy transfer from hot to cold appliances is essential, because of the extended use of freezers.

Drinking glasses can be divided into two different markets: that of everyday glasses for which the main purchasing criterion is price, and that of traditional glassware which is considered as an investment. The latter is of high quality, usually purchased as a gift (especially for weddings) and is a declining market. The decision to buy a particular brand is usually based on the image of the brand in combination with the design of the wine glass. The well known brands in this segment are Riedel, WMF, Nachtmann, Peill+Putzler and Schott-Zwiesel.

Glasses for everyday use are replaced frequently by the consumer. These are basically low interest products, which can only command low consumer prices. Moreover, the market for this type of glasses is strongly affected by promotions from gasoline companies and food and wine suppliers, who give these glasses away free when consumers buy their products. However, this market segment is growing, because it is influenced by fashion. The number of different glasses designed for particular drinks has increased with the rise in the variety of drinks demanding a special glass. Consumers like to use products well adapted to a particular use. The increase in different designs and shapes is also stimulated by the wish of the consumer to use special products on special occasions (Christmas, Easter, Valentine’s Day, etc.). The market for character merchandising on drinking glasses for children is still continuing to grow.

Professional users of glass demand increased durability, better quality. The more exclusive glasses are sold to the top hotels and restaurants.

Cutlery

There are basically two markets for cutlery - that of high quality giftware sold in sets and cutlery for everyday use, generally sold separately.

Everyday cutlery can be divided into two segments: conventional and fashion-oriented cutlery. Everyday cutlery, in general, should be inexpensive and fashion-oriented pieces can fetch somewhat higher prices. A good example of this is cutlery with coloured handles, which has been popular for several years as a result of a trend towards matching kitchenware. This type of cutlery, although also sold separately, is sometimes presented in simple sets of four or six on a stand. This type of novelty provides manufacturers and retailers with added value in a generally low value sector.

Manufacturers are increasingly designing special of cutlery to match the demand of the consumer to have a special product for every occasion. New developments include the introduction of pizza cutlery, with specially designed knives with a wider blade.
Also spaghetti cutlery, with a special part to prevent the pasta from falling off, has been introduced. Opportunities for new concepts are presented by the increasing influence of exotic dishes in the Netherlands kitchen.

High quality giftware can also be divided into two segments: stainless steel and plated cutlery, and cutlery made of precious metals, mainly silver. The top end of the market is completely covered by famous brands, such as Robbe and Berking, Wilkens, and Koninklijke van Kempen & Begeer. This type of cutlery is purchased once in a lifetime and the purchases are seen as an investment. In this sector it is very important that the manufacturer guarantees delivery of the product range for at least 10 years.

Metalware

In the last ten years the number of Netherlands' households cooking by gas has decreased from 80 percent to 63 percent of the total. Cooking methods using ceramic and induction hobs have increased, creating a demand for specially adapted saucepans. In the case of ceramic hobs, which consist of a vitro ceramic surface heated by radiant or halogenic rings, a very strong heat is given off very quickly and this can damage ordinary pans. Induction hobs, however, necessitate the use of saucepans with high magnetic properties. Hence, the increase in demand for pans resistant to all types of heat, and pans specially suited to vitro ceramic hobs or induction hobs. Recent tests by consumer organisations have clearly indicated the saving in the use of energy by induction cooking compared to ordinary gas. Moreover, the quality of the prepared food was judged as very good. Induction cooking requires a large investment of between NLG 3,000 to NLG 4,000 in the stove and it also requires special pans which are usually comparably expensive. The most important brands in The Netherlands for these types of pans are BK and Hackmann.

- **Stainless steel**

Stainless steel is especially suited to radiant and halogenic surfaces and demand for cookware will increase, because of the growing use of ceramic hobs. Moreover, this material is easy to clean and suitable for dishwashers. However, it is not magnetic enough for induction hobs which require cast iron or enamelled steel pans. It is important that the quality of enamelled pans is improved, as they are very vulnerable to scratches on the bottom. Leftovers of food can remain in such crevices, which make this type of product unsuitable for professional use.

- **Aluminium**

Aluminium has long been favoured as a material for cookware, especially because the material is very light. At the same time, it is also vulnerable to acids and, therefore, not suited for all cooking purposes. Aluminium cannot be used in the microwave oven and this has also depleted its market share. Moreover, scientific research has raised issues as diverse as possible links between aluminium and Alzheimer's disease, in relation to cookware and lead seepage from crystalware. Aluminium cookware may suffer from the adverse publicity caused by this research.

In general, the consumer is demanding larger saucepans in order to capture and diffuse the heat more efficiently. Handles are also getting bigger and are ergonomically designed, with better heat-resistant qualities. It is also getting more important to produce products which save energy during cooking.

Another trend is that the traditional kettle to boil water is rapidly losing its place in the market because of the enormous growth in sales of electric kettles. The advantages of the electric kettle compared to the old kettle are that it is faster, the quantity of water is easier and it can be used any place where you have an electric outlet.

Plasticware

This sector, although relatively small in relation to the total housewares market, used to be one of the fastest growing sectors. Benefiting from the advantages of being lightweight and relatively cheap, plasticwares were also fashionable and suited the trend towards matching kitchen accessories. Attracted by the bright colours and modern design of plastic products, consumers often made impulse purchases, which is why a continuous launching of new ranges was essential. Today, on the one hand, consumers are slowly move away from plastic, perhaps because of environmental awareness, and are buying glass, ceramic and wooden products instead. On the other hand, manufacturers of metalware (e.g. Fissler pans) are using plastic covers for storage of their pans in the refrigerator to add extra convenience for the consumer.

It is assumed that storage containers account for the largest product category in terms of value. This is due to the high value per piece and to the fact that manufacturers continue to develop new uses for their products all the time. Plastic bins and hermetically sealed food containers are the next most important products. Bins designs have developed from plain models to pedal bins and bins with flip lids and are available in many sizes and different colours. This has resulted in an increase of use throughout the house.

Food storage containers are typical impulse purchases and, therefore, new models are launched frequently. The consumer expects that these containers can go from the freezer (- 40 °C) directly into the microwave oven (+90 °C) for heating. Moreover, they need to be dishwasher proof, and space saving is also important in storage. Therefore, manufacturers are developing new products which are multi-functional. Vacumation is slowly becoming a trend, as the convenience-oriented consumer demands freshness of products for a longer period of time.

Woodware

This sector remains the smallest of all both in value and volume. In the mid nineties there seemed to be a growing interest in woodware, which was thought to be caused by the increasing demand for natural products. Today, the market is clearly divided between the cheap wooden products made in the Far East (especially China) and the high quality products from Western European countries (mainly Belgium and Germany).
It is remarkable that it is especially the highly priced top quality products, such as wooden trolleys, which attract more attention. Brands are not relevant in this market segment.

3.2 Production

The Netherlands industry for housewares is limited. Netherlands brands are, therefore, less known by consumers. In plastics, Netherlands brands are well known, whereas in ceramicware foreign brands such as Wedgwood and Villeroy & Boch are more popular. Nevertheless, the Netherlands industry has a multitude of suppliers of housewares, supplying both the domestic and export markets.

Ceramic tableware is produced by Royal Mosa, who supplies both the domestic and the professional market (especially institutions). Glassware is manufactured by Koninklijke Leerdam Glasfabrieken / Verenigde Glasfabrieken. Cutlery is manufactured by Van Kempen & Begeer, who also produces the brand Gero. Another local manufacturer is Amefa. Metal kitchenware is manufactured by Brabantia who is known for high quality products. An important manufacturer of metal pans is BK.

In contrast to other sectors, there are large and important plastic housewares manufacturers in The Netherlands. The largest is Curver, which is the number two producer in the world after Rubbermaid in this sector. Other well known producers are Tigers Plastics, Flair and Seno. These companies together have a major share of the Netherlands market, mainly because of brand awareness on the part of the consumer.

In general, the life cycle per product has been strongly reduced and is now very short. This puts enormous pressure on the manufacturers to come up with new ideas and products all the time, in order to sustain their market share. Manufacturers have to produce a wide range in order to maintain turnover. Companies which are not able to spread their production over a wide range, are facing very difficult times.

In today’s market, it is either a case of being big and producing large volumes at low margins, or being a “niche” player where small volumes can be sold at high margins. These so called “niches” demand deep market knowledge and an extremely professional approach.

Due to the small number of producers in The Netherlands no production figures are published.

3.3 Imports

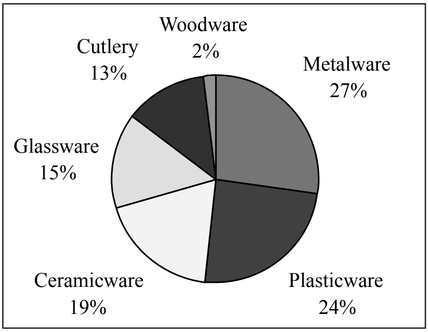
Please note that the same restrictions apply to the import and export statistics of The Netherlands as to the EU (see Introduction). Developing countries, as defined by OECD, are listed in Appendix 10. Appendix 2 lists detailed imports statistics with respect to The Netherlands and the EU, including the import figures of the different product groups and the most important countries of origin.

3.3.1 Total imports

In 1997, total imports of tableware, kitchenware and household articles were US$ 557 million showing a decrease of 2 percent over 1996. Imports originated mainly in other EU countries. The share of developing countries in total imports of housewares into The Netherlands increased by 4 percent, to US$ 145 million in 1997, reflecting a share of 26 percent.

The most significant categories of imports are metalware (especially iron or steel) and plasticware. Other main imported product groups were glassware and ceramicware.

Figure 3.1 Imports of housewares into The Netherlands by product group (% of total value), 1997



Source: Eurostat (1998)

Producers from the Far Eastern countries continue to make inroads into The Netherlands market. In the past, products imported from these countries were mainly distributed within the lower market segment. Nowadays, although the emphasis still lies on cheaper products, because of improved quality and ability to adapt to rapidly changing trends, exporters from that region also penetrate the middle market level with their products.

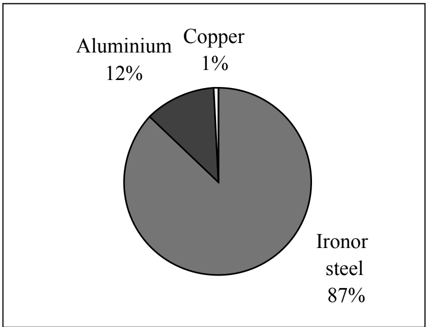
3.3.2 Imports by products

Metalware

In 1997, metalware was the leading product group imported into The Netherlands (see Figure 3.1). Between 1995 and 1997, imports of metalware into The Netherlands increased by 23 percent, amounting to US$ 151 million in 1997.

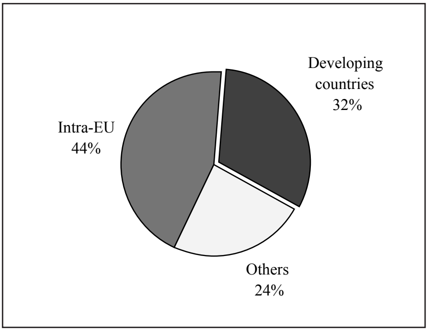
From Figure 3.2 it is clear that housewares of iron or steel is the leading product group within the metalware segment.

Figure 3.2 Imports of metalware into The Netherlands (% total value), 1997



Source: Eurostat (1998)

Figure 3.3 Imports of metalware into The Netherlands (as a share of total value), 1997



Source: Eurostat (1998)

The two largest suppliers were China and Germany, supplying 19 percent and 12 percent of total imports of metal housewares respectively. Besides China, Turkey is also an important developing country supplier, its supply increasing almost 7 times between 1995 and 1997.

- **Housewares of steel or iron**

Imports of housewares of steel or iron more or less stabilised at US$ 132 million in 1997. China was the leading supplier, followed by Germany accounting for 21 percent and 13 percent respectively. Imports of this product group originating in China more than doubled between 1995 and 1997. Developing countries were responsible for 35 percent of total imports in 1997.

- **Housewares of aluminium**

It should be noted that trade figures for 1995 are not available. Imports of aluminiumware increased by 48 percent between 1996 and 1997 amounting to US$ 18 million in 1997. France was the leading supplier, accounting for 42 percent of imports into The Netherlands, followed by Italy (16%) and Belgium (15%). Developing countries, India being the leading supplier, accounted for 7 percent of total imports.

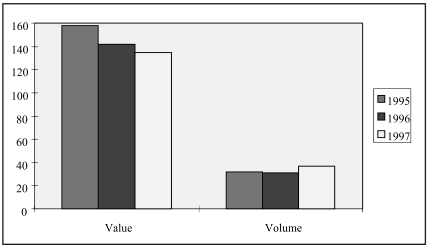
- **Housewares of copper**

Trade figures for 1995 are not available. Netherlands imports of copperware increased between 1996 and 1997 from US$ 0.7 million to US$ 1 million. The leading suppliers were India and China and 78 percent of total imports into the Netherlands originated in developing countries.

Plasticware

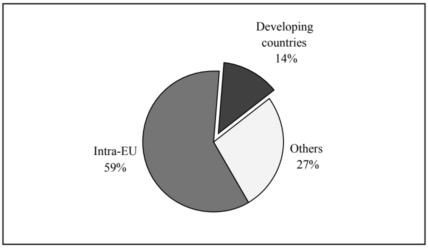
Plasticware was the second most important product group in terms of import value in 1997, and represented 24 percent of total houseware imports.

Figure 3.4 Imports of plasticware into The Netherlands (value in US$ million, volume in thousand tonnes), 1995-1997



Source: Eurostat (1998)

Figure 3.5 Imports of plasticware into The Netherlands (as a share of total value), 1997

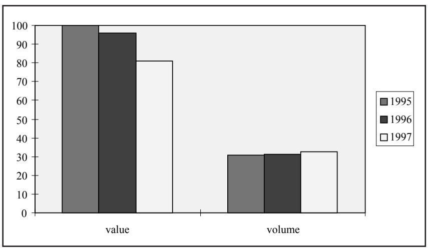


Source: Eurostat (1998)

The value of plasticware imports into The Netherlands showed a substantial decrease from US$ 158 million in 1995 to US$ 134 million in 1997. The largest supplier was Germany, followed by Belgium. In contrast to the decrease in total imports, imports originating in developing countries increased from US$ 14 million in 1996 to US$ 18 million in 1997. Developing countries were mainly represented by China.

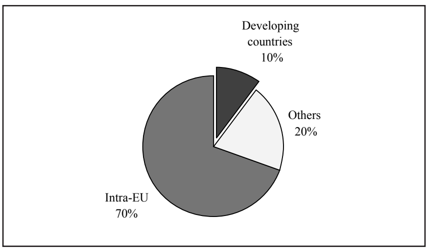
Glassware

Figure 3.6 Imports of glassware into The Netherlands (value in US$ million, volume in thousand tonnes), 1995-1997



Source: Eurostat (1998)

Figure 3.7 Imports of glassware into The Netherlands (as a share of total value), 1997



Source: Eurostat (1998)

The imports of glassware decreased by 15 percent between 1996 and 1997 to US$ 81 million. EU countries were the dominant suppliers of glassware. Germany was the largest supplier (22%), followed by France (20%) and Belgium (9%). The share of developing countries in total imports decreased from 15 percent in 1996 to 10 percent in 1997, mainly due to decreased supply from China, Thailand and Indonesia.

- **Drinking glasses of toughened glass**

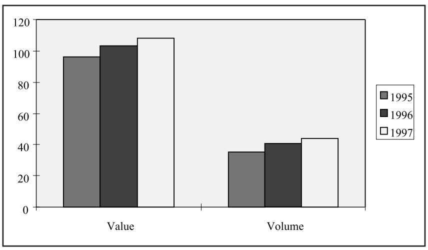
Drinking glasses of toughened glass are the main product group within glassware imported into The Netherlands, accounting for 44 percent of total imported glassware. Between 1995 and 1997, imports of this product group fluctuated from US$ 34 million in 1995 to US$ 50 million in 1996, and returned to US$ 36 million in 1997. Major suppliers were France (28% of total 1997 imports), Germany (24%) and Belgium (16%). Developing countries, chiefly Thailand, Turkey and China, were responsible for 8 percent of total imports into The Netherlands in 1997.

- **Glassware of a kind used for table or kitchen purposes of toughened glass**

Glassware of a kind used for table or kitchen purposes of toughened glass was the second most important product, accounting for 21 percent of total glassware imported into The Netherlands. The total value of imports of this product group stabilised at US$ 17 million in 1997. The main sources were Germany (16%), France (13%) and Poland (13%). The share of developing countries in imports declined from 24 percent in 1995 to 17 percent in 1996 and stabilised at 17 percent in 1997. Developing countries were mainly represented by Turkey and China, accounting for 40 percent and 22 percent of imports from developing countries respectively.

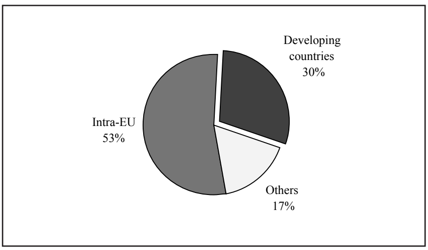
Ceramicware

Figure 3.8 Imports of ceramicware into The Netherlands (value in US$ million, volume in thousand tonnes), 1995-1997



Source: Eurostat (1998)

Figure 3.9 Imports of ceramicware into The Netherlands (as a share of total value), 1997



Source: Eurostat (1998)

Between 1996 and 1997, in terms of value, ceramicware witnessed an increase of 5 percent to US$ 108 million. Germany was the leading supplier, accounting for 21 percent of total imports of ceramicware, followed closely by China (20%).

The share of developing countries in the imported value of ceramicware expanded from US$ 23 million in 1996 to US$ 32 million in 1997. After China (US$ 21 million), the Philippines (US$ 4 million) was the key supplier.

- **Housewarewares of china or porcelain**

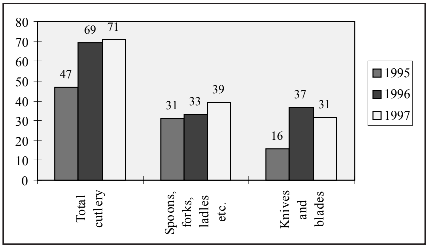
47 percent of total imports of ceramic housewares in 1997 were products of china or porcelain. Between 1995 and 1997, imports of this product group stabilised at US$ 51 million in 1997. Imports originated mainly in EU countries (39%) and developing countries (37%). The leading supplier was China accounting for 27 percent of total imports, followed by Germany (19%) and the Philippines (7%).

- **Housewares of other than china or porcelain**

The total value of imports of ceramic housewares not made of china or porcelain increased by 2 percent from US$ 50 million in 1996 to US$ 51 million in 1997. These originated mainly in Germany (23%). The share of developing countries in imports of this product group increased from 17 percent in 1996 to 23 percent in 1997 due to increase in imports originating in China. Imports of these products from China more than tripled between 1995 and 1997, amounting to US$ 7 million in 1997. Other main developing country suppliers in 1997 were Thailand and Malaysia.

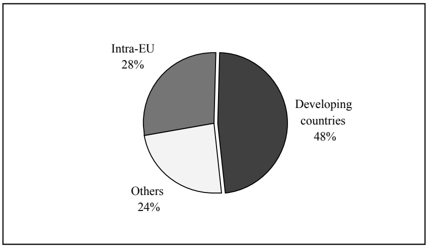
Cutlery

Figure 3.10 Imports of cutlery into The Netherlands (value in US$ million, volume in thousand tonnes), 1995-1997



Source: Eurostat (1998)

Figure 3.11 Imports of cutlery into The Netherlands (as a share of total value), 1997



Source: Eurostat (1998)

The value of cutlery imports showed a small increase between 1996 and 1997 from US$ 69 million to US$ 70 million mainly due to an increase in imports of spoons, forks etc. The largest supplier was China, accounting for 28 percent of total cutlery imports, followed by Germany (12%). Imports originating in developing countries increased from US$ 27 million in 1996 to US$ 34 million in 1997, reflecting 48 percent of total imports. Leading developing country suppliers were China and Indonesia.

- **Spoons, forks, ladles, skimmer, etc.**

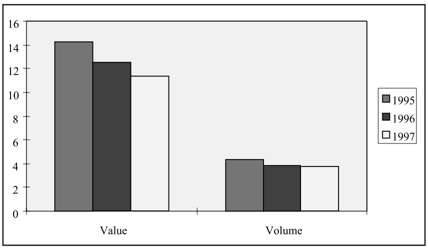
In 1997, the product group of spoons, forks etc. accounted for 55 percent of total imported cutlery. Total imports of these items into The Netherlands amounted to US$ 39 million in 1997, reflecting an increase of 19 percent compared to the previous year. Imports mainly originated in developing countries, which accounted for 58 percent of total imports in 1997. The leading supplier was China, responsible for 34 percent of the total. China strongly increased exports to The Netherlands from US$ 5 million in 1995 to US$ 14 million in 1997. Other important supplying developing countries were Indonesia and Thailand.

- **Knives and blades**

Total imports of knives and blades decreased by 14 percent from US$ 37 million in 1996 to US$ 31 million in 1997. The share of EU and developing countries amounted to 38 percent and 34 percent respectively. The leading supplier was China, responsible for 20 percent of the total imports of knives and blades. EU suppliers were represented by the UK and Germany. An other leading exporting developing country was Indonesia.

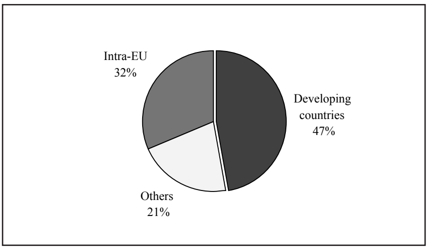
Woodware

Figure 3.12 Imports of housewares of wood into The Netherlands (value in US$ million, volume in thousand tonnes), 1995-1997



Source: Eurostat (1998)

Figure 3.13 Imports of housewares of wood into The Netherlands (as a share of total value), 1997



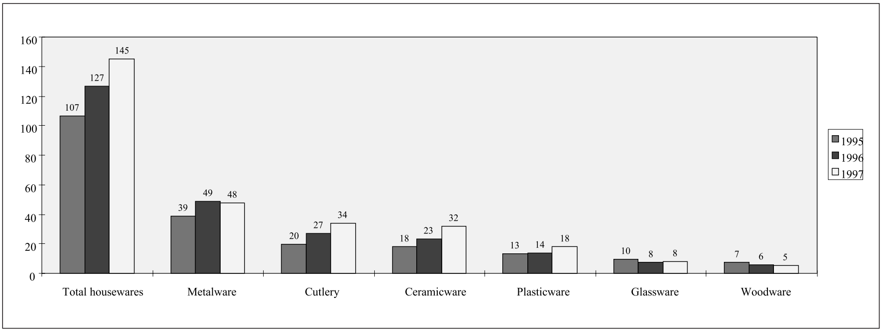
Source: Eurostat (1998)

Imports of woodware into The Netherlands, both in terms of value and volume, decreased strongly to US$ 11 million in 1997. The share of developing countries in total imports decreased from 52 percent in 1995 to 47 percent in 1996 and stabilised at 47 percent in 1997. The leading supplier in 1997 was China (24%), followed by Thailand (19%).
EU suppliers were mainly represented by Belgium and Germany, accounting together for 25 percent of total woodware imports.

3.3.3 The role of developing countries

Appendix 2 provides detailed import statistics for the main product groups covered in this survey. In Appendix 10, a list of developing countries, as defined by the OECD, is given.

Figure 3.14 Imports of housewares into The Netherlands originating in developing countries (US$ million), 1995-1997



Source: Eurostat (1998)

In 1997, about US$ 145 million worth of housewares originated in developing countries of which 33 percent consisted of metalware. Within metalware, housewares of iron or steel are the most important product group exported by developing countries to The Netherlands. Other major products exported by developing countries are cutlery and ceramicware, accounting for 23 percent and 22 percent of total developing countries' supply in 1997.

Table 3.3 Netherlands imports of housewares from developing countries (share in the imported value of each product group; share of each product group in the total imported value originating in developing countries), 1997

	Total (US$ thousand)	**Developing countries (US$ thousand)**	**% per product group**	**% of total DC's supply**
Total housewares	**556,523**	**144,962**	**26**	**100**
METALWARE	**151,004**	**47,757**	**32**	**33**
Copperware	1,135	879	77	1
Iron or steelware	131,791	45,646	35	31
Aluminiumware	18,079	1,232	7	1
CUTLERY	**70,700**	**33,645**	**48**	**23**
Spoons, forks, ladles, skimmers etc.	39,235	22,957	59	16
Knives and blades	31,465	10,688	34	7

continued

continued	**Total (US$ thousand)**	**Developing countries (US$ thousand)**	**% per product group**	**% of total DC's supply**
CERAMICWARE	**108,033**	**32,018**	**30**	**22**
Ceramicware of porcelain or china	51,162	19,059	37	13
Ceramicware of other than porcelain or china	56,871	12,959	23	9
PLASTICWARE	**134,306**	**18,164**	**14**	**13**
Other household and toilet articles of regenerated cellulose	54,066	5,238	10	4
Household and toilet articles of regenerated cellulose	679	38	6	0
Tableware and kitchenware of plastics	79,561	12,888	16	9
WOODWARE	**11,343**	**5,351**	**47**	**4**
Housewares of other wood	11,273	5,310	47	4
Housewares of tropical wood	70	41	58	0
GLASSWARE	**81,137**	**8,029**	**10**	**6**
Other than drinking glasses of lead crystal	7,890	672	9	0
Glassware of a kind used for table purp. (tough. glass)	16,961	2,851	17	2
Of glass having a linear coefficient	6,788	78	1	0
Glassw. of a kind used for table purposes (lead crystal)	5,352	693	13	0
Drinking glasses toughened glass	36,062	2,981	8	2
Drinking glasses of lead crystal	6,451	160	2	0
Glassware of glass ceramics	1,634	593	36	0

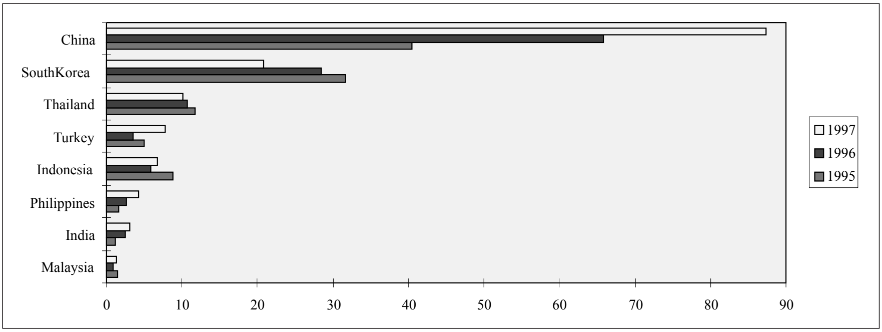
Source: Eurostat (1998)

Note: sum of the figures does not comply with the total amount due to rounding off

Since 1995, imports of housewares from developing countries into The Netherlands have increased. In 1996, imports amounted to US$ 127 million, 19 percent higher than in 1995. In 1997, imports increased again by 14 percent to US$ 145 million. Imports increased more in terms of volume than in terms of value, indicating that prices are under pressure.

China dominated imports and accounted for 60 percent of 1997 imports from developing countries, followed by Thailand (7%) and Turkey (5%). Imports of housewares into The Netherlands originating in China showed strong increases in the years 1995 to 1997.

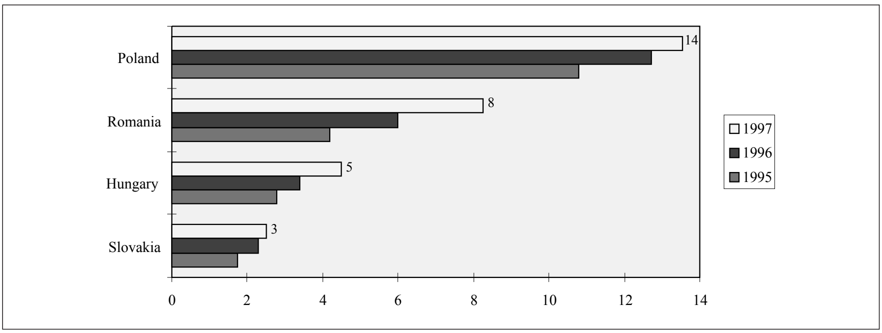
Figure 3.15 The leading developing country suppliers of housewares to The Netherlands (US$ millions), 1995-1997



Source: Eurostat (1998)

A relatively small group of developing countries accounts for a significant share of the houseware imports to The Netherlands, mainly represented by China, Thailand and Turkey. It can also be observed that the East European countries such as Poland, Romania and Hungary are beginning to make inroads into the West European market. As a result, the competition between East European countries and developing countries is growing, particularly in the market segments of glassware and ceramicware.

Figure 3.16 The leading *East European* suppliers of housewares to The Netherlands (US$ millions), 1995-1997



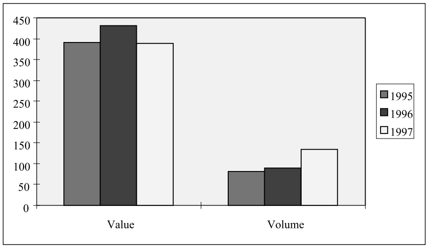
Source: Eurostat (1998)

3.4 Exports

In 1997, The Netherlands was a net importer of housewares. Total exports of housewares amounted to US$ 388 million in 1997. 82 percent of the exports were destined for other EU markets, reflecting the importance of The Netherlands as a gateway to Europe. Major destinations of exports of housewares from The Netherlands are shown in the figure below.

Figure 3.17 Netherlands exports of housewares (value in US$ million, volume in thousand tonnes), 1995-1997

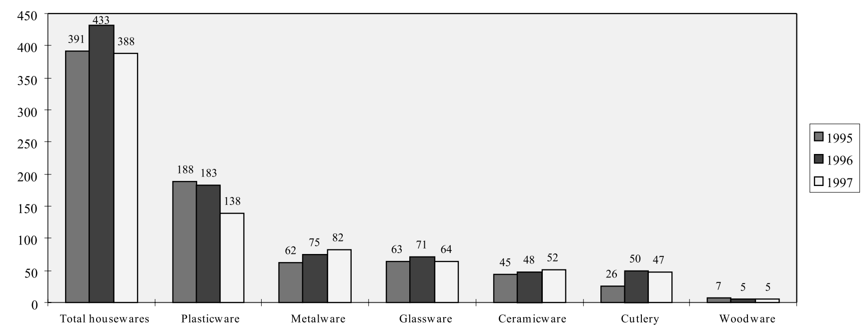
- Total exports (1997): US$ 388 million
- Main product groups: tableware and kitchenware of plastic, of iron or steel, drinking glass of toughened glass
- Destinations of exports: Germany, Belgium, France, the UK, Japan



Source: Eurostat (1998)

Plastic housewares is the leading product group, representing 36 percent of the total exported value (US$ 76 million) in 1997. Metalware is the second largest product group, mainly represented by housewares of iron or steel (not enamelled).

Figure 3.18 Netherlands exports of housewares (US$ million), 1995-1997

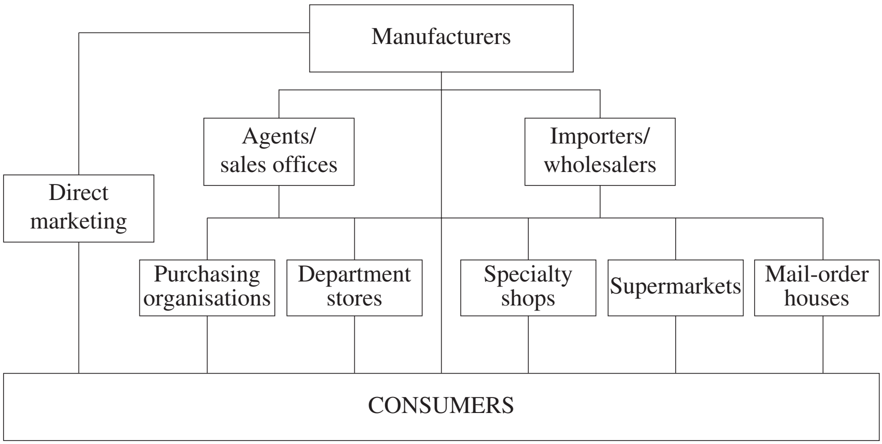


Source: Eurostat (1998)

3.5 Trade structure

It is important for the exporter to be aware of the different distribution channels in the market. The best way for prospective exporters to find out the best option for their product range, is to contact several importers, multiple retailers and department stores, and subsequently select potential trade partners (see Section 5.5.3 business practice).

Figure 3.19 Trade and distribution channels for housewares



- **Importers/wholesalers**

Distribution of housewares to the larger retailers, department stores and mail-order houses often take place directly from the manufacturer. Although use of the services of a whole-saler can be a great advantage, especially taking in consideration the quick succession of the new trends in this market, the position of the wholesale trade has decreased lately. Besides a few importers/wholesalers operating in The Netherlands on a nation-wide basis, there are also a few smaller wholesalers that operate on a regional basis only. Importers keep stocks and either sell through their own sales staff or by using agents. For a list of Netherlands importers see Appendix 11.

- **Agents**

Agents are mere intermediaries who do not keep stocks. The agent may serve as an intermediary between the manufacturer and the wholesaler or retailer, receiving a commission from the former. The level of commission depends on a number of factors, including the turnover rate of the product concerned; it averages an estimated 5 to 10 percent of turnover.
Most agents represent more than one manufacturer. They usually have a good knowledge of distribution structures and consumer behaviour.

- **Sales offices**

Some of the foreign manufacturers have their own sales offices in The Netherlands. This is interesting if a manufacturer wants to ensure that his products are properly advertised and distributed. Only the larger companies which cover a substantial part of the market maintain their own offices, such as Villeroy & Boch and Rosenthal (both manufacturers of ceramic tableware).

- **Purchasing associations**

The role of purchasing organisations is becoming more and more important. By becoming a member of such an organisation, the individual retailer aims to diminish his extremely high costs for small orders. The larger purchasing organisations establish trading companies or "agents" in countries where a substantial volume in terms of products and money is purchased. These agents co-ordinate all the purchasing and export activities in order to reduce costs and check delivery times and quality. This method replaces the traditional agent, who is located in the county of destination.

- **Retailers**

Apart from direct sales, retailers constitute the final stage before products reach the consumer. In this report a distinction is made between department stores, specialty stores, supermarkets and mail-order houses. It should be noted that there is a growing interest in housewares (glass, china and earthenware) from other sectors, especially in the home decoration and 'Do It Yourself'(D.I.Y.) sectors. This is because housewares have a positive effect on the overall ambiance of stores and because the margins are relatively interesting.

In 1996, it was estimated that there were about 12,000 outlets where consumers could purchase housewares. Through diversification of the sector it is hard to give an exact indication of the current number of outlets, but there are strong indications that this number has increased in the last few years.
In spite of this increase, the number of specialised intra-sectoral stores has decreased from 2,700 outlets in 1996 to approximately 2,100 outlets in 1998. Of these, 25 percent are retailers in glass, porcelain and earthenware, 10 percent are retailers specialised in housewares and 65 percent are retailers with a general range of houseware products (including e.g. toys).

Department stores
It is estimated that 10 percent of sales are channelled through department stores. The main ones playing a leading role in the distribution of housewares are Vroom & Dreesman (V&D), Hema and Bijenkorf. The later carries more luxury products, while Hema sells more everyday articles. By traditionally, V&D takes a position in the middle but a change towards better (and thus more expensive) products can be observed. A good example of this change is the presence of a permanent stand of Villeroy & Boch in a number of V&D outlets.

Specialist shops
On the retail side, it is estimated that 40 percent of sales are channelled through specialist shops. These outlets, known in The Netherlands as the "Gemengde Branche" (mixed sector), sell a wide range of articles. The specialists can be divided in two groups: one selling mainly household articles, including a range of accessories and decorative articles, and in some cases also toys (e.g. Blokker, Marskramer) and the other selling mainly glass, porcelain, china and earthenware (e.g. Hoyng).
Specialisation in the sector is concentrated mainly in the Western part of the country (the most heavily populated areas). Specialty cooking shops and luxury shops for glass, porcelain and ceramicware can be found mainly in larger cities.

It is expected that co-operation, enlargement of scale and specialisation will continue. Most independent retailers have become members of central buying organisations. The biggest advantage of these associations is a reduction in costs by centralising the function of collection department, buying and logistics. Moreover, these organisations are often involved in professional support with regard to advertising and in-store presentation.

More than half of the stores in the mixed sector are part of a chain store-formula or participate in some sort of franchise organisation or association. The most important ones are listed in the next table.

Table 3.4 Chain stores (more than 7 outlets) and commercial co-operations in the mixed sector, 1998

Name of organisation	type of organisation	brand-name(formula) stores
Focke & Meltzer[1] /Elysee	chain store	13
Blokker	franchise/chain store	452
De Glasgarage	franchise	8
Novy	franchise	27
Hoyng	branch	18
Marskramer	franchise/chain store	185
Novalux	purchasing & selling organisation	107
Spectra	purchasing & selling organisation	26
Heemskerk	franchise/chain store	7
Giraffe	chain store	54
Xenos	chain store	70
Goed idee winkel	purchasing & selling organisation	40

[1] Focke & Meltzer were taken over by WMF Nederland Filialen BV, in July 1998.
Source: EIM (1999)

- **Other non-specialist shops**

Supermarkets
Housewares are also sold by supermarkets. In many EU countries the large stores located outside the city-centres (like for example Carrefour in France or Pryca in Spain), include more and more houseware articles in their assortment. Recently, this trend has started in the Netherlands. One of the largest supermarket chains, Albert Heijn, has started to sell cutlery, glass, and also pans. The special offers for their regular customers have made the selling of these items a big success.

Specialised retailers look suspiciously at this new trend. They fear that manufacturers may leave their traditional distribution channels in favour of the extended reach of the supermarket chains. It that case, competition will increase and probably margins will drop, because the exclusiveness of the products specialised retailers sell, might disappear.

Mail-order houses
Mail-order houses send illustrated catalogues of their merchandise to prospective customers, who can do their shopping at home, rather than paying a visit to a store. All that has to be done is to fill out an order form and mail it or place the order by telephone and the product(s) are sent to the customers' home within a couple of days. Mail-order houses operate mainly in the low and middle ranges regarding price, quality and design. Important mail-order houses operating in The Netherlands and selling housewares are: Wehkamp, Otto and Neckermann. Traditionally, the expenditures per capita in The Netherlands are lower than in the neighbouring countries. Textiles/clothing and books are the most important products, followed by household articles, furniture, stereo equipment, insurance and other goods.

Direct marketing
Direct marketing is rapidly becoming an important method of distribution. A good example of direct marketing are selling parties, where manufacturers demonstrate their collections and where customers can buy directly from the manufacturer. One of the best example of a brand which is sold through this method is "Tupperware". This brand obtained almost 100 percent brand awareness in The Netherlands housewares market during recent decades. Because of the cost involved in direct marketing activities, this channel is particularly suited for the better quality and more expensive products.

Internet
The use of internet as a way of selling and buying products is a growing trend in many consumer branches. Especially products with a low-emotional value and brand products (products with a proven quality) could make good sales through the World Wide Web. With regard to the product groups described in this study, this trend is not expected to be very important in the next few years. One reason for this is that the distribution (mailing) of these, in general fragile products will be quite complicated.

Factory outlet centres
An other hot item in the Netherlands is the possible introduction of factory outlet centres in a few places in the country. These factory outlet centres, which are already very popular in the USA and in some European countries, like France, Germany and the United Kingdom, are situated outside the city centre. Here, manufacturers of well known brands offer surplus stock, remnants, last year's collection or products with small fabrication errors. By leaving out intermediary traders, costs can be reduced for the manufacturer and consumers can buy branded items at lower prices. It is not yet clear whether these factory outlet centres will be introduced in The Netherlands. In 1998 Villeroy & Boch has already opened its first own outlet in the Netherlands.

3.6 Prices and margins

Prices and margins are influenced by a combination of factors and they are different for each product/market combination.

Factors influencing prices and margins
- Degree of risk (highly innovative, new brand, etc.) - Volume of business (rate of turnover) - Functions or marketing services rendered (advertising, etc.) - General economic conditions (booming or depressed business) - Competition - Exclusiveness

3.6.1 Prices

In the past, importers of housewares from developing countries were looking for low-priced merchandise. Nowadays, the emphasis lies on quality, flexibility, timely delivery and fashionable designs. This trend is a response to changing demand in the market.

However, the market can still be divided into various product/market combinations, for which price brackets exist. These barriers should be taken into careful consideration. Without being complete, a brief survey of retail prices of different product groups in The Netherlands will be given. Be aware that these are indications of retail prices and not import prices.

- **Cutlery**

Prices of single items depend mainly on quality. Most items are made of stainless steel. In the cheaper ranges the approximately price of a knife is between NLG 1.50 (US$ 0.72) and NLG 10 (US$ 5). These items are sold by multiples like Blokker and Xenos. Better quality knives made of 18/8 steel start from NLG 10 (US$ 5) till NLG 40 (US$ 19). If the product contains silver, the price goes from NLG 65 (US$ 31) upwards.

Prices for sets vary with the brand, quality and material used. The stainless steel sets for six persons (40 items) vary from NLG 250 (US$ 120) (non-brand items) to NLG 750 (US$ 360). Cutlery made of so-called 18/8 steel is much more expensive, with prices from NLG 750 (US$ 360) upwards for sets. Brands in this segment are Wilkins and BSF, amongst others.

The prices of silver cutlery depends on the percentage of silver used. Sets of about 40 items can range from NLG 600 (US$ 288) to more than NLG 9,000 (US$ 4,324). In this segment, significant brands are Christofle, Wilkens, Robbe & Berking.

- **Ceramic tableware**

The market can be divided into three segments. The cheapest products are usually imported from Far Eastern Countries. The price of a plate ranges from NLG 3 (US$ 1.40) to NLG 10 (US$ 5). These products are sold mostly by the multiples and by department stores such as Hema and Xenos.

The first segment covers cheap products mostly from Far Eastern countries. Prices of plates vary from NLG 3 (US$ 1.40) to NLG 10 (US$ 5). These products are sold by the chain stores and mass market outlets (Blokker, Hema, Xenos, etc.) without a brand. Promotional offers by stores like Blokker can offer a 75-piece, dishwasher-proof service for NLG 299 (US$ 144). Today, D.I.Y. stores, flower shops and even gasoline stations have begun to sell these products, in order to increase their profits.

The middle segment includes ceramicware with prices of a plate ranging from NLG 10 (US$ 5) to NLG 30 (US$ 14). This segment is supplied by the only major Netherlands manufacturer of tableware Royal Mosa and increasingly by imports from Asian countries upgrading their own products. These products are sold by department stores (Vroom & Dreesmann) and some specialty shops. It should be noted that prices within a certain brand vary strongly.

The top segment includes ceramicware with prices of plates over NLG 30 (US$ 14). The prestigious brands in this segment are Villeroy & Boch, Wedgwood, Arzberg, Hutschenreuter and Rosenthal. The products in this segment are sold in the better department stores (Bijenkorf) and specialty shops (Hoyng, Focke & Meltzer, etc.)

- **Glassware**

The lower end of the market is covered by shops like Blokker, Marskramer, Xenos and Hema. The cheapest, drinking glasses for everyday use cost only around NLG 1 (US$ 0.50) or NLG 2 (US$ 1).

More expensive items are sold by shops like Hoyng, Bijenkorf and specialty shops. Prices can vary from NLG 10 (US$ 5) to NLG 100 (US$ 48). It should be noted that glassware covers a whole range of items, varying from bowls to long drinking glasses.

- **Kitchenware**

Prices in the sector depend heavily on brand and quality. The cheaper items are sold by stores like Blokker and Hema, but the supermarkets sometimes include these products in their assortment as well.

The expensive brand items (WMF, Brabantia and Silit) are sold through department stores and specialty shops. The prices of these products vary from NLG 7.50 (US$ 3.60) to NLG 25 (US$ 12) per item. Individual items usually belong to complete sets of designed kitchenware.

- **Pans**

The prices for pans depend largely on quality and brand name. The cheaper items are made of aluminium or enamel and vary from approximately NLG 10 (US$ 5) to NLG 30 (US$ 14). Woks of aluminium cost approximately NLG 20 (US$ 10), while woks made of cast iron are twice as expensive.

The medium segment of this market consists of stainless steel items of good quality, enamelled steel pans with prices ranging from NLG 20 (US$ 10) to NLG 45 (US$ 27).

In the upper segment of the market, with prestigious brands like WMF, Le Creuset and Langostini, pans are made of stainless steel and cast iron. Prices vary between NLG 30 (US$ 14) and NLG 150 (US$ 72).

- **Plasticware**

Sales in this sector are mainly dictated by price. Consumers still consider housewares made of plastic as of low interest, which means that they see the buying of plastic housewares more as a necessity than as an interesting purchase. Promotions in this sector are almost always price oriented. Either the article is sold at a much cheaper price than normal, or the consumer is offered products - sets of 2 or 3 - for the price of one.

However, the trend at the moment is that plastic items are continually being upgraded. Since more attention is given to fashionable designs and the use of different colours, price has become a less important marketing instrument.

3.6.2 Margins

It is impossible to draw up a schedule of actual margins for each and every product/market combination. Even within the same type of combination, different importers use different margins, due to variations in economic conditions.

The effect of low, medium and high margins on consumer end prices, based on one CIF price for three different products in the same category, is illustrated in the following table:

Table 3.5 Calculation schedule: margins of housewares

	Low	Medium	High
CIF Rotterdam/ Amsterdam	100	100	100
Import duties charges on CIF basis	pm[1]	pm[1]	pm[1]
Handling charges, transport, insurance and banking services	6	6	6
	106	**106**	**106**
Importer/wholesaler's margin (25%, 30%, 50%)	26	37	53
	132	**143**	**159**
Retailer's margin (40 %, 50%, 60%)	53	71	95
Net selling price	**185**	**215**	**255**
Value Added Tax (VAT) 17.5% of Net selling price[2]	33	38	45
Gross selling price (consumer price)	**218**	**253**	**300**
Ratio CIF/consumer price	**2.18**	**2.53**	**3.00**

[1] Percentages of import duties on CIF basis see Table 5.2

[2] In practice, retailers mark up by 90 -125 percent, including VAT.

3.6.3 Sources of price information

The best way to get a good impression of the different market segments and the prices is to visit the various types of retail outlets, such as department stores, specialists and multiples. Apart from prices, a good impression of the wide variety of products and their quality can be obtained through such a visit. Catalogues, especially of mail-order houses (e.g. Wehkamp) and advertising leaflets and magazines of V&D, Blokker, Xenos, Bijenkorf and others also offer a good opportunity to gain insight into the consumer prices.

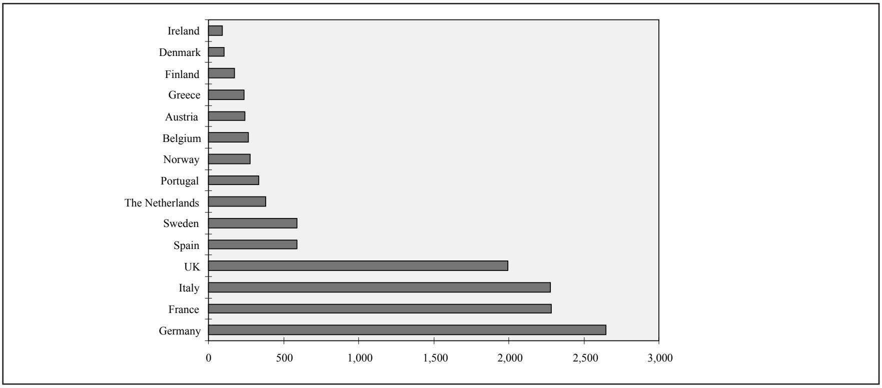
4 THE EUROPEAN UNION MARKET

4.1 The EU market summary

- **Consumption**

In 1998, the EU consumption of glassware, ceramicware, plasticware and cutlery amounted to US$ 12 billion. The leading consumers were Germany, France, Italy and the UK.

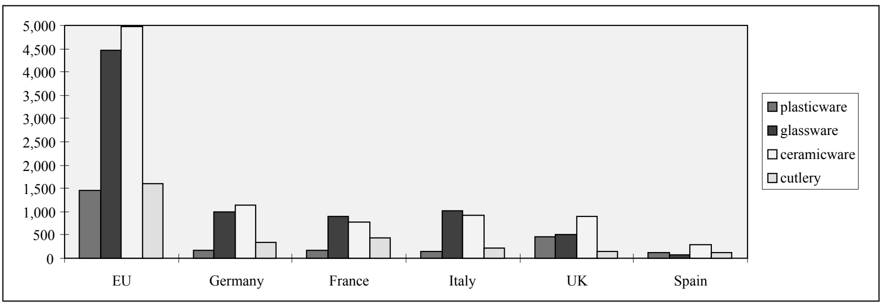
Figure 4.1 Consumption of housewares in the EU (US$ million), 1998



Source: Consumer Europe 1999

All of the four major markets achieved growth between 1993 and 1998. The UK is the major market for plasticware, Germany for ceramicware, Italy for glassware and France for cutlery.

Figure 4.2 Consumption of housewares in selected EU countries by product group (US$ million), 1998



Source: Consumer Europe 1999

- **Production**

The housewares industry world wide is dominated by prestigious European brands. The housewares market is quite fragmented, which is reflected in the number of manufacturers who play an important role in one sector only and the lack of any dominant manufacturer across the entire housewares market. However, mergers and the acquisition of overseas manufacturers, as well as joint ventures, are causing some consolidation. The box below represents an overview of major manufacturers in some EU countries.

Germany	
Leonardo (*glassware*) WMF (*cutlery*) Rosenthal (ceramicware)	Villeroy & Boch (*ceramicware*) Hutschenreuter (*ceramicware*)
Italy	
Bormioli Rocco (*glassware*) Durand (*crystalware*)	Fidenza Vetra (*glassware*) Borgonovo (*glassware*)
Spain	
Vicrilla (*glassware*) Tatay (*plasticware*)	Cristalerias (*crystal*) Monix (*metalware*)
UK	
Téfal (*cookware and bakeware*) Prestige (*cookware and bakeware*)	Wedgwood (*ceramicware*) Richardson Sheffield (*cutlery*)
France	
J.P.G. Durand (*crystalware*) SEB (*cookware*)	Limoges (*porcelainware*) Verreries Cristalleries d'Arques (*glassware*)

Key developments

Product development has been focused on the need to adapt products in order to take account of greater penetration levels of white goods such as dishwashers and microwave ovens. Whilst both glassware and ceramicware can be used without difficulty in a microwave oven, a sector for dedicated microwaveware has evolved.

Manufacturers are also adapting many of their cookware products for use on ceramic and induction hobs and on moving flame gas jet cookers. The different formats often require cookware with special properties and prohibit the use of non-specific wares. For example, cold-to-touch induction hobs favour the use of cast iron cookware because of the molecular reaction necessary for heat production.

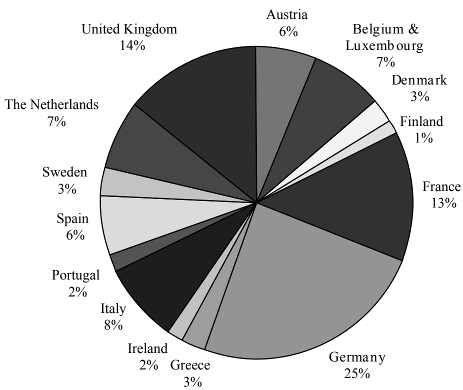
Innovations within the glass and ceramicware sectors are concerned with temperature-resistance. Hectic lifestyles are creating a need for prepared dishes which can be stored in the freezer and transferred directly to the microwave oven. Manufacturers are, therefore, faced with the task of producing cookware with the strength and versatility to cope with dramatic changes in temperature. Future developments focus on heat-proof (cool-to-touch) and stain-proof vitroceramics and glassware.

- **Imports**

Please note that the same restrictions apply to the import and export statistics of the EU as to The Netherlands (see Introduction). Detailed import/export statistics are listed in Appendix 2.

In 1997, imports of housewares into the EU amounted to US$ 7 billion, reflecting a small decrease of 1 percent over 1996. The most considerable increases were in the UK, Austria, Ireland and France.

Figure 4.3 Shares of EU countries in total EU housewares imports, 1997



In 1997, the major importers within the EU were Germany, the UK, France, Italy and The Netherlands.

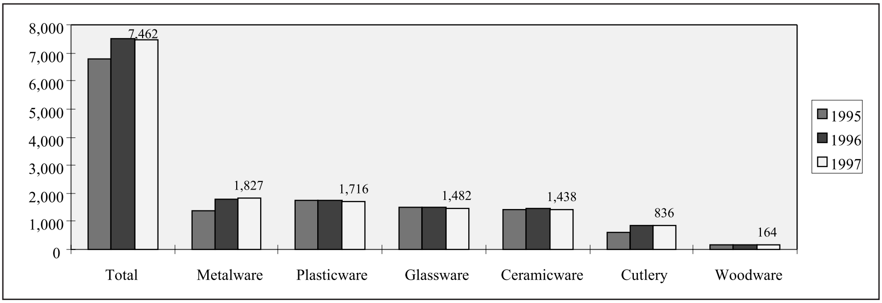
The main housewares imported into the EU in 1997, ranked in terms of average quantity and main suppliers, were:

Leading suppliers of housewares to the EU, 1997		
Metalware	➔	**China (*21%*), Italy (*18%*), Germany (*9%*)**
iron and steel	➔	China (*26%*), Italy (*14%*), Germany (*10%*)
copper	➔	India (*31%*), China (*17%*), Brazil (*10%*)
aluminium	➔	Italy (*39%*), France (*17%*), Belgium (*6%*)
Plasticware	➔	**Belgium (*15%*), France (*12%*), Italy (*10%*)**
Glassware	➔	**France (*26%*), Germany (*10%*), Italy (*9%*)**
drinking glasses of toughened glass	➔	France (*27%*), Germany (*11%*), Italy (*10%*)
drinking glasses of lead crystal	➔	France (*30%*), Italy (*15%*), Germany (*12%*)
glassw. of a kind used for table etc. purposes of tough, glass	➔	France (*30%*), Italy (*11%*), Germany (*9%*)
Ceramicware	➔	**Germany (*14%*), UK (*10%*), Italy (*9%*)**
porcelain or china	➔	Germany (*22%*), Czech Republic (*8%*), China (*8%*)
other than porcelain and china	➔	Portugal (*25%*), Italy (*15%*), UK (*14%*)
Cutlery	➔	**China (*28%*), Germany (*10%*), Italy (*8%*)**
spoons, forks, ladles etc.	➔	China (*34%*), Italy (*11%*), South Korea (*9%*)
knives and blades	➔	China (*20%*), Switzerland (*15%*), Germany (*11%*)
Woodware	➔	**Thailand (*20%*), China (*17%*), Taiwan (*6%*)**

Source: Eurostat (1998)

In 1997, metalware was the leading product group imported into the EU and represented 24 percent of total housewares imports, followed by plasticware (22%). Housewares of iron or steel in particular played a major role, accounting for 79 percent of imported metalware.

Figure 4.4 Imports of housewares into the EU (US$ million), 1995-1997



Source: Eurostat (1998)

The role of developing countries was substantial, as they supplied 22 percent of total EU imports. The dominant supplier was China, followed at far distance by Thailand. The key product group supplied by developing countries was metalware, especially copper.

Table 4.1 EU imports of housewares from developing countries (share in the imported value; shares of each product group in the total imported value originating in developing countries), 1997

	Total (US$ thousand)	Developing countries (US$ thousand)	% per product group	% of total DC's supply
TOTAL HOUSEWARES	**7,462,492**	**1,669,697**	**22**	**100**
METALWARE	**1,826,538**	**568,723**	**31**	**34**
Household articles of copper	32,243	20,351	63	1
Household articles of aluminium	341,713	24,794	7	1
Household articles of iron or steel	1,452,581	523,578	36	31
CUTLERY	**835,754**	**367,203**	**44**	**22**
Spoons, forks, ladles, skimmers etc.	493,367	257,103	52	15
Knives with cutting blades	342,387	110,099	32	7
WOODWARE	**164,033**	**78,643**	**48**	**5**
Of other wood	159,127	77,080	48	5
Of tropical wood	4,906	1,564	32	0

continued

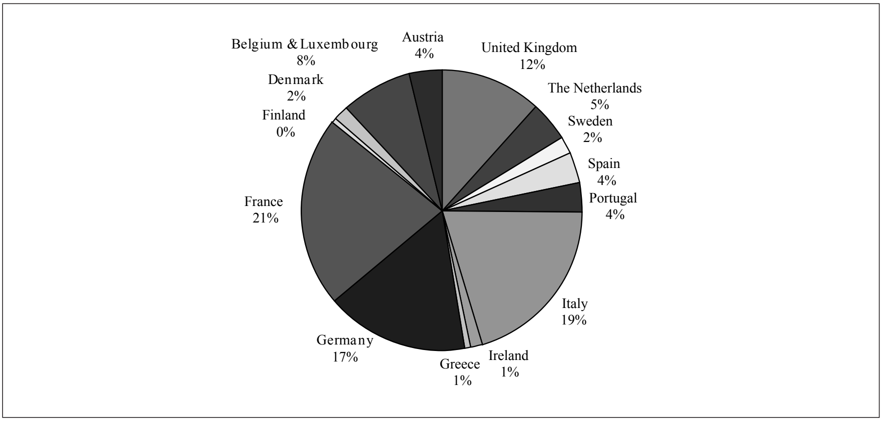
continued	Total (US$ thousand)	Developing countries (US$ thousand)	% per product group	% of total DC's supply
CERAMICWARE	**1,438,204**	**290,167**	**20**	**17**
Household articles of other than porcelain or china	646,993	143,321	22	9
Household articles of porcelain or china	791,211	146,846	19	9
PLASTICWARE	**1,715,865**	**226,441**	**13**	**14**
Other household and toilet articles of regenerated cellulose	528,228	66,472	13	4
Household and toilet articles of regenerated cellulose	14,897	989	7	0.1
Tableware and kitchenware of plastics	1,172,741	158,980	14	10
GLASSWARE	**1,482,098**	**138,520**	**9**	**8**
Other glassware of lead crystal	212,568	2,912	1	0.2
Glassware of a kind used for table etc. purposes of tough. glass	348,050	42,694	12	3
Glassware of glass having a linear coefficient etc.	73,513	2,259	3	0.1
Glassw. of a kind used for table etc. purposes (lead crystal)	70,756	3,711	5	0.2
Drinking glasses of toughened glass	586,106	77,750	13	5
Drinking glasses of lead crystal	141,255	7,107	5	0.4
Glassware of glass ceramics	49,850	2,088	4	0.1

Source: Eurostat (1998)

- **Exports**

In 1997, the EU exported almost US$ 9 billion worth of housewares, reflecting an increase of 10 percent compared to 1995 and was a net exporter. The leading exporters were France, Italy and Germany. Major destinations were the USA (13%), Germany (12%), France (8%), The Netherlands (6%) and the UK (5%).

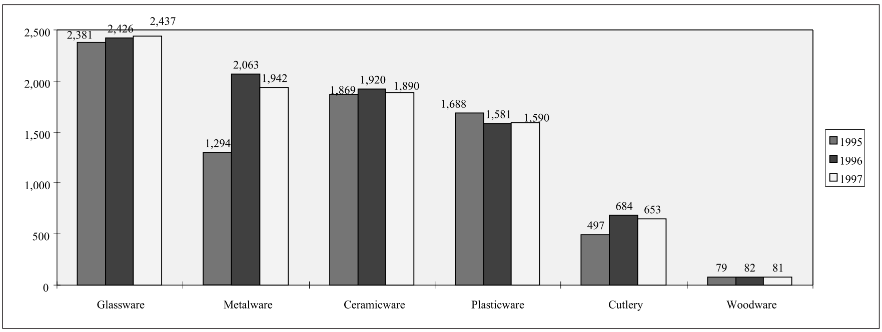
Figure 4.5 Shares of EU countries in total EU housewares exports from the EU, 1997



Source: Eurostat (1998)

The leading product group exported by the EU countries was glassware, followed by metalware, ceramicware and plasticware. Glassware was mainly represented by drinking glasses of toughened glass (US$ 786 million), followed by glassware of a kind used for table or kitchen purposes of toughened glass (US$ 637 million). Within metalware, housewares of stainless steel was the leading exporting product group, amounting to US$ 735 million in 1997. Housewares of porcelain or china was responsible for 56 percent of total exported ceramicware.

Figure 4.6 EU housewares exports by product group (US$ million), 1995-1997



Source: Eurostat (1998)

- **Trade structure**

The information on trade structure and distribution channels described in Section 3.5 about The Netherlands is also relevant for the trade in housewares for the rest of the EU market. Therefore, one is referred to Figure 3.19, which shows the most important actors in the trade structure, and the most common distribution channels.

On the distribution side, mass merchandisers, supermarkets and hypermarkets are accounting for an increasing proportion of sales of everyday housewares. Because of their size in terms of square metres of shopping space and the volume of articles handled, they are able to offer competitive prices and shelf space. Plasticware and kitchen utensils, in particular, are being picked up by consumers in conjunction with their grocery shopping. However, specialists and department stores continue to account for the greater part of sales in the ceramic and glassware sectors and significant shares of the metalware and cutlery sectors. Department stores and specialists are traditional stockists of luxury, up-market, high priced articles, because they have the congenial atmosphere that suits the image of the products. Moreover, sales staff trained to deal with wedding lists and gift purchases, which account for a large proportion of turnover in the glass and ceramicware sectors, are of importance in selling these up-market articles.

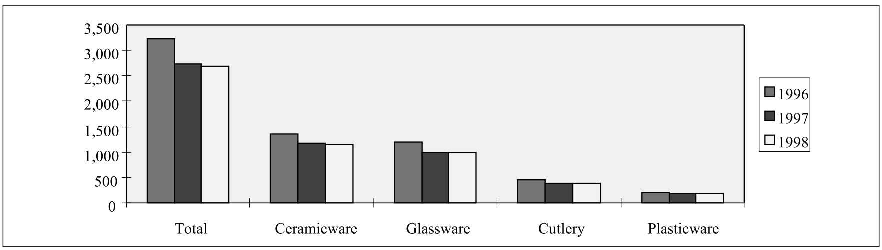
4.2 Profile of the major EU markets

4.2.1 Germany

- **Consumption**

Germany is the largest consumer of housewares in the EU. In 1998, German consumption of housewares (excluding metalware and woodware) amounted to US$ 2.6 billion. Although consumption of ceramicware decreased between 1996 and 1998, it remained the leading product group, followed by glassware.

Figure 4.7 German consumption of housewares by product groups (US$ million), 1996-1998



Source: Consumer Europe 1999

The German consumer demands very high standards of quality and design. Moreover, he is increasingly interested in exotic food and likes to own cookware which enables its preparation at home. The German kitchen has become heavily influenced by Mediterranean eating and cooking methods and this offers market opportunities for specially designed products such as cutlery for spaghetti.

- **Production**

Germany is an important producer and exporter of housewares. Major producers are:
- Leonardo (glassware)
- WMF (metalware)
- Walther Glas (glassware)
- Schott-Zwiesel (glassware)
- Rosenthal (ceramicware)
- Solingen (cutlery)

IMPORTS	
Total imports (1997):	*US$ 2 billion*
Main product groups:	*Housewares of stainless steel, housewares of plastics, housewares of porcelain or china, drinking glasses of toughened glass*
Main developing country suppliers:	*China, Turkey, Thailand, Indonesia*

Germany is a major importer, exporter and trader in housewares and has a large housewares production capacity. In 1997, Germany imported US$ 1.8 billion of housewares. Between 1996 and 1997, the share of developing countries increased from 27 percent to 29 percent of total imports. In terms of value, the leading role is taken by China, who supplied 59 percent of total houseware imports into Germany from developing countries.

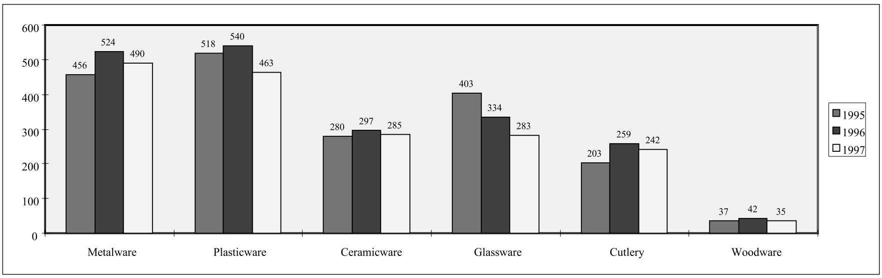
Table 4.2 Imports of tableware, kitchenware and household articles into Germany (value in US$ thousand, volume in tonnes), 1995-1997

	1995		**1996**		**1997**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,896,521**	**433,960**	**1,995,728**	**437,918**	**1,797,505**	**443,491**
Extra-EU	**985,078**	**221,968**	**1,024,171**	**231,028**	**986,806**	**245,539**
Developing countries	**523,990**	**124,894**	**532,811**	**128,812**	**517,865**	**134,54**
Top 3 suppliers						
China	258,081	62,222	277,399	66,324	304,849	72,064
Italy	198,218	54,841	218,508	55,336	204,116	55,732
France	253,312	77,033	261,635	63,885	187,201	53,406
Developing countries						
China	258,081	62,222	277,399	66,324	304,849	72,064
Turkey	44,597	14,554	38,089	14,122	37,253	16,569
Thailand	29,123	9,671	30,003	10,061	30,408	11,479
Indonesia	31,293	6,754	27,721	6,153	26,908	6,996

Source: Eurostat (1998)

In 1997, metalware was the leading imported product group, representing 27 percent of the total value of imported housewares. Although plasticware declined strongly, it remained the second largest imported product. Imports of glassware also decreased strongly compared to the previous year.

Figure 4.8 Housewares imported into Germany by product group (US$ million), 1995-1997



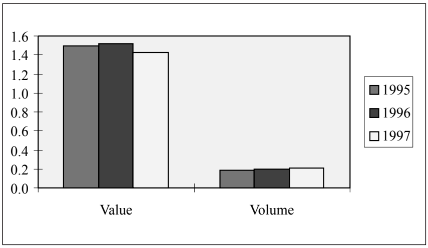
Source: Eurostat (1998)

Metalware was mainly represented by housewares of stainless steel, amounting to US$ 280 million in 1997. 57 percent of imports of ceramicware consisted of housewares of porcelain or china. Drinking glasses of toughened glass were responsible for 44 percent of total imported glassware.

EXPORTS	
Total exports (1997):	*US$ 1.5 billion*
Main product group:	*Housewares of china or porcelain, housewares of stainless steel, housewares of plastics, drinking glasses of toughened glass*
Destinations of exports:	*USA, The Netherlands, Switzerland, France, Italy, Belgium*

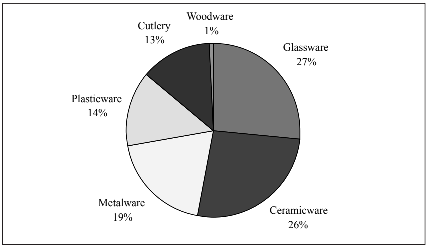
Between 1996 and 1997, German exports of housewares declined by 6 percent, amounting to US$ 1.4 billion. 49 percent of total exports went to other EU countries.

Figure 4.9 German exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.10 German exports of housewares (% of total value), 1997



Source: Eurostat (1998)

Glassware was mainly represented by drinking glasses of toughened glass, amounting to US$ 128 million in 1997. Porcelain or china housewares accounted for 90 percent of total German ceramicware exports. Stainless steel housewares took the major part within metalware and were responsible for 53 percent of total exports.

- **Distribution**

Hypermarkets, supermarkets and mass merchandisers are increasingly prominent in the distribution of housewares for everyday use. Specialists and department stores continue to account for the bulk of value sales because of the greater proportion of up-market products such as bridal gifts, purchased via these outlets.

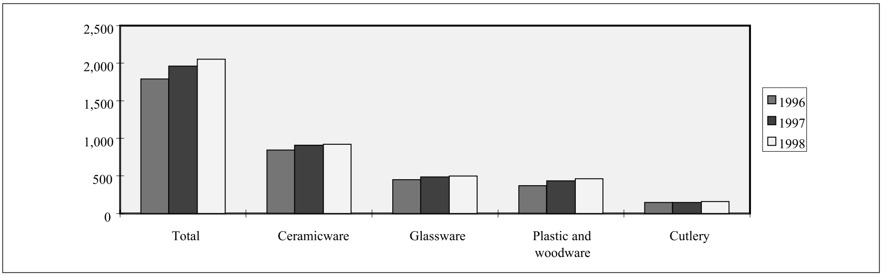
4.2.2 United Kingdom

- **Consumption**

The UK housewares market is fashion conscious with new colour styles launched each year. Trends include a move towards continental and international cookware as the British public become more adventurous in their eating habits. Changes in eating habits and life style have also promoted the growth of products for the casual dining sector, which suits kitchen or dining room use and is dishwasher safe.

In 1998, UK housewares consumption (excluding metalware) amounted to US$ 2 billion. Ceramicware accounted for 44 percent of total consumption. Consumers in the UK require high standard ceramicware articles, as they are familiar with the quality and design of their domestically manufactured fine bone china and porcelain tableware. In 1998, although sales of top quality china, porcelain and crystal are, to some extent sustained by the bridal market, the largest growth appears to be in casual dining products along with mid-price giftware.

Figure 4.11 UK consumption of housewares by product group, 1996-1998



Source: Consumer Europe 1999

Glassware is the second largest sector with a 25 percent share of the market in 1998. Extended use of freezers and microwave ovens has created an increase in demand for glass and vitro ceramic ovenware. Their qualities for easy transfer from hot to cold appliances are highly valued.

The introduction of new types of cooker such as ceramic and induction hobs has created a demand for specially adapted saucepans. Pan sets, particularly of the more up-market brands, continue to be popular as presents. The cookware market is seasonal, with spring and summer seeing strong sales (for wedding gifts) and sales also boosted at Christmas.

- **Production**

The UK market has several large manufacturers producing housewares. Waterford Wedgwood (*crystal glass, china, ceramics*) is one of the most famous of them. Other well known suppliers are Prestige Group (*cookware*), Royal Doulton (*china*), Richardson Sheffield (*cutlery*), Curver Rubbermaid (*plasticware*, owned by Netherlands DSM) and Addis (*plasticware*).

IMPORTS	
Total imports (1997):	*US$ 1 billion*
Main product groups:	*Housewares of plastics, housewares of stainless steel, ceramic housewares (other than porcelain or china), drinking glasses of toughened glass, housewares of aluminium*
Main developing country suppliers:	*China, Thailand, India*

Total imports of housewares into the UK increased considerably between 1995 and 1997, amounting to US$ 1 billion in 1997 (up 37%). China was the leading supplier of housewares to the UK. The share of developing countries in total imports of housewares into the UK increased to 32 percent in 1997. The major suppliers were China, Thailand and India.

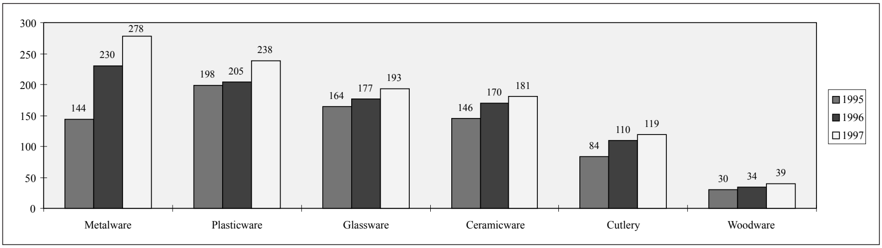
Table 4.3 Imports of tableware, kitchenware and household articles into UK (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**766,212**	**194,906**	**925,673**	**230,963**	**1,048,364**	**281,779**
Extra-EU	**404,625**	**103,645**	**476,631**	**112,855**	**559,581**	**143,624**
Developing countries	**238,039**	**69,336**	**272,109**	**73,440**	**332,774**	**96,356**
Top 3 suppliers						
China	126,504	35,222	153,401	40,486	196,212	53,884
France	88,797	25,475	116,161	38,200	126,687	61,868
Italy	60,080	18,834	86,526	24,346	88,621	21,825
Developing countries						
China	126,504	35,222	153,401	40,486	196,212	53,884
Thailand	34,164	9,567	35,169	8,544	41,759	14,747
India	10,782	2,982	15,016	3,184	19,973	4,043

Source: Eurostat (1998)

The main imported housewares were metalwares, accounting for 26 percent of total imports into the UK. Between 1995 and 1997, imports of metalware almost doubled. Plasticware and glassware were the next most important import product groups in 1997.

Figure 4.12 Imports of housewares into the UK by product group (US$ million), 1995-1997



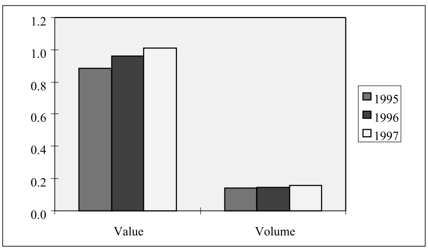
Source: Eurostat (1998)

Metalware was mainly represented by housewares of stainless steel, amounting to US$ 122 million in 1997. Housewares of porcelain or china accounted for 34 percent of total imported ceramicware. Of totally US$ 193 million imported glassware, US$ 67 million consisted of drinking glasses of toughened glass.

EXPORTS	
Total exports (1997):	*US$ 1 billion*
Main product groups:	*Ceramic housewares, housewares of plastics, drinking glasses of toughened glass, glassware of glass of having a linear coefficient*
Destinations of exports:	*USA, Japan, Ireland, Germany, France, The Netherlands, Italy*

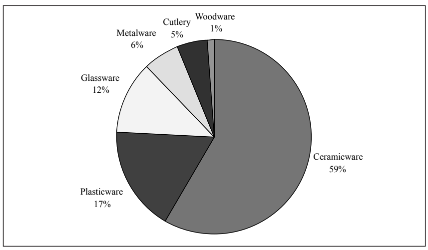
UK exports of housewares increased slightly between 1995 and 1997 when they amounted to US$ 1 billion. About 42 percent of exports had destinations in other EU countries.

Figure 4.13 UK exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.14 UK exports of housewares (% of total value), 1997



Source: Eurostat (1998)

In 1997, ceramic housewares was the leading exported product group, mainly represented by housewares of porcelain or china. Glassware was mainly represented by drinking glasses of toughened glass, which accounted for 49 percent of total glassware exports.

- **Distribution**

Hypermarkets, supermarkets and mass merchandisers are still prominent in the distribution of housewares for every day use. Distribution of plastic housewares takes place through a variety of outlets such as grocery, hardware and DIY stores. Department stores and mixed retailers continue to dominate the sales of tablewares. Groceries are selling an increasing proportion of cookware, bakeware and durable microwave cookware. Mail-order houses are active in the UK market in the sector of cookware, bakeware and kitchen knives sector.

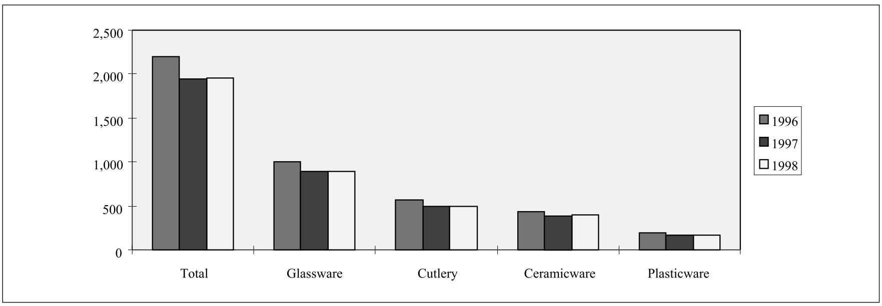
4.2.3 France

- **Consumption**

The French often divide the tableware market into two broad categories: "art de la table" and "quotidien". The former sector traditionally includes top-of-the-range tableware such as porcelain, high quality crystalware and silverware and is almost exclusively purchased as a wedding gift or collector's item. The latter sector refers to standard tableware for everyday use. In this survey, as mentioned earlier, the products have been classified according to their respective materials.

It is useful to know that ceramics in France include several specific types of materials:
- Faïence (a glazed earthenware)
- Grès (a type of stoneware)
- Porcelain (mainly produced in Limoges).

Figure 4.15 French consumption of housewares by product group (US$ million), 1996-1998



Source: Consumer Europe 1999

Following a decrease of 11 percent between 1996 and 1998, French consumption of glassware, cutlery, ceramicware and plasticware rose to almost US$ 2 billion in 1998. Glassware products represented the largest sector of the market with 46 percent sales by value.

The changing life style of French people is one of the main reasons behind the lack of dynamism in the housewares market. An increasing number of women is working and spending less time on housework and cooking. The American trend of “fast food” has a detrimental effect on the cookware and bakeware market as a whole.

The health trend has increased the demand for new cookware products, such as steam cookers, pressure cookers and woks, which allow cooking without fat. Non-stick cookware, which also requires less fat for cooking, has become a growing market sector. The most popular material for pans is coated aluminium, and they are equipped with metallic bases suitable for induction hobs. Frying pans are the most popular non-stick products in France.

Plastic housewares are cheap, light weight and fashionable, reflecting the trend towards matching kitchen accessories. The bright colour and modern designs of plastic products stimulate impulse purchases by consumers.

- **Production**

France is an important producer and exporter of most cookware and tableware products: leading companies include Verreries Cristalleries d’Arques, Guy Degrenne, Le Creuset and Tefal. The bulk of glasswares exports are produced in the Verreries Cristalleries d’Arques.

IMPORTS	
Total imports (1997):	*US$ 1 billion*
Main product groups:	*Housewares of plastics, ceramic housewares, drinking glasses of toughened glass, housewares of stainless steel, housewares of aluminium*
Main developing country suppliers:	*China, Turkey, Thailand, Indonesia, Tunisia*

Total imports of housewares into France increased by 9 percent to US$ 996 million in 1997. The three largest suppliers, Italy, Belgium and Germany accounted together for 44 percent of total imports. Developing countries were responsible for 17 percent of total imports, China was the leading supplier.

Table 4.4 Imports of tableware, kitchenware and household articles into France (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**913,753**	**234,259**	**952,060**	**235,705**	**995,924**	**278,542**
Extra-EU	**256,341**	**75,232**	**285,220**	**75,803**	**301,534**	**88,277**
Developing countries	**141,254**	**46,532**	**155,964**	**46,873**	**172,716**	**55,720**
Top 3 suppliers						
Italy	166,423	50,426	190,126	51,626	201,780	60,400
Belgium & Luxembourg	120,643	24,328	119,530	26,323	135,806	30,769
Germany	121,358	17,197	130,768	20,509	103,846	18,988
Developing countries						
China	67,248	23,947	73,609	22,037	85,532	26,433
Turkey	11,810	5,311	16,475	7,316	18,744	10,636
Thailand	13,993	3,169	14,951	3,341	12,870	3,039
Indonesia	8,800	3,672	8,898	3,482	9,172	3,267
Tunisia	6,681	1,218	4,790	920	6,847	1,710

Source: Eurostat (1998)

The product group was plasticware, representing 28 percent of total imported housewares in 1997, and was followed by metalware and glassware. Housewares of stainless steel and aluminiumware accounted for 28 percent and 24 percent of total metalwares respectively. Housewares of iron or steel (enamelled) increased considerably between 1995 and 1997, amounting to US$ 9 million in 1997. Ceramicware, in particular of porcelain or china, decreased between 1995 and 1997, when imports were valued at US$ 104 million in 1997. Glassware was mainly represented by drinking glasses of toughened glass (US$ 76 million). Imports of glassware other than drinking glasses (of lead crystal) also increased between 1995 and 1997, when imports reached to US$ 7 million in 1997.

Figure 4.16 Imports of housewares into France by product group (US$ million), 1995-1997

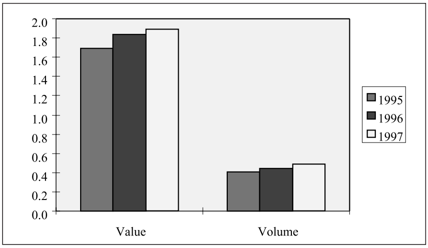
Source: Eurostat (1998)

During 1996 and 1997, French exports of housewares slightly increased to US$ 1.9 billion (up 2%). 48 percent of total exports went to other EU countries.

EXPORTS	
Total exports (1997):	*US$ 2 billion*
Main product groups:	*Glassware of a kind used for table or kitchen purpose of toughened glass, drinking glasses of toughened glass, plastics housewares, housewares of porcelain or china, drinking glasses of lead crystal*
Destinations of exports:	*USA, Germany, Italy, UK, Belgium, Spain*

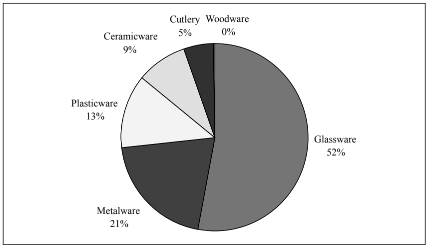
The leading exported product group was glassware, followed by metalware. Plasticware exports fell from US$ 280 million in 1995 to US$ 130 million in 1996, and recovered to US$ 237 million in 1997. Porcelain and china housewares accounted for US$ 117 million of the total US$ 168 million exports of ceramicware in 1997.

Figure 4.17 French exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.18 French exports of housewares (% of total value), 1997



Source: Eurostat (1998)

The product group glassware was mainly represented by glassware of a kind used for table and kitchen purpose and drinking glasses of toughened glass, which respectively accounted for 34 percent and 31 percent of total exported glassware in 1997. Drinking glasses of lead crystal accounted for 11 percent of total exported glassware (US$ 108 million).

- **Distribution**

Hypermarkets have become more important as retail outlets for housewares. As department stores cannot compete on price, manufacturers often produce special up-market ranges of cookware for department stores and specialists, and cheaper ranges for hypermarkets. In France, the so-called “own label” products are widespread, especially for everyday housewares.

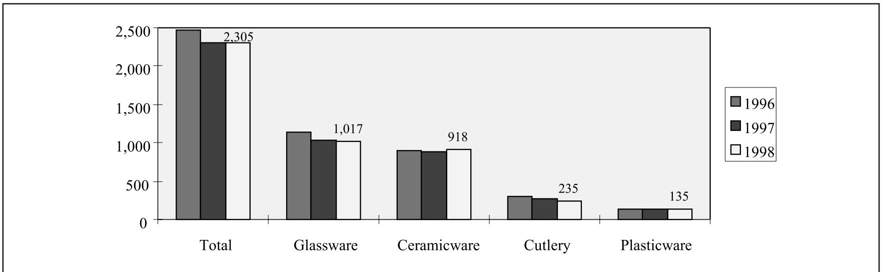
Retail distribution of porcelain is still dominated by specialist retailers and department stores due to the traditional image and high price.

4.2.4 Italy

- **Consumption**

Italy is one of the largest consumers of housewares among the EU countries. In 1998, Italian consumption of housewares (excluding metalware and woodware) amounted to US$ 2 billion. Although glassware purchases declined by 10 percent between 1996 and 1998, it remained the most important sector representing 44 percent of total housewares’ consumption in the latter year.

Figure 4.19 Italian consumption of housewares by product groups (US$ million), 1996-1998



Source: Consumer Europe 1999

The Italian market for housewares is strongly influenced by all types of sales promotions, in which housewares are given away free. This clearly indicates the interest Italian consumers have for a wide range of housewares articles.

The Italian consumer is demanding as far as quality and design are concerned. However, nowadays it is important that products are convenient, easy to use and preferably not too expensive.

- **Production**

Bormioli Rocco, Fidenza Vetra and Covetro are major manufacturers of drinking glasses. Bormioli Rocco is particularly significant in the giftware sector. The main brands produced by Bormioli Rocco are Quatro Stagioni (containers for preserving food at room temperature) and Frigoverre (containers for preserving food in refrigerators).

IMPORTS	
Total imports (1997):	*US$ 605 million*
Main product groups:	*Housewares of porcelain or china, drinking glasses of toughened glass, housewares of plastics, housewares of stainless steel*
Main developing country suppliers:	*China, Turkey, Thailand*

After an increase of 4 percent in 1996, Italian imports of housewares decreased in 1997 but were still higher than in 1995 (US$ 606 million). About 62 percent of Italian imports of housewares originated in other EU countries.

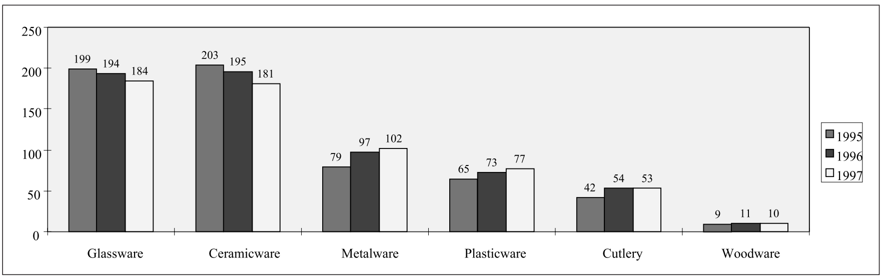
Table 4.5 Imports of tableware, kitchenware and household articles into Italy (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**597,160**	**118,748**	**622,761**	**118,351**	**605,914**	**134,535**
Extra-EU	**219,775**	**54,128**	**220,103**	**53,916**	**227,978**	**65,269**
Developing countries	**101,019**	**33,367**	**107,580**	**32,088**	**124,023**	**41,955**
Top 3 suppliers						
France	124,196	29,488	132,589	29,464	128,563	34,130
Germany	140,315	14,195	124,278	13,337	108,796	12,703
United Kingdom	41,560	6,428	42,336	6,486	43,477	6,309
Developing countries						
China	31,929	8,915	33,253	8,601	41,896	11,085
Turkey	14,393	7,453	16,618	8,226	19,274	13,218
Thailand	10,303	2,894	9,843	2,391	12,097	4,102

Source: Eurostat (1998)

The three largest suppliers, France, Germany and the UK, were responsible for 46 percent of total imports of housewares in 1997. In that same year, developing countries supplied 20 percent of total imports. China was the leading supplier.

Figure 4.20 Imports of housewares into Italy by product group (US$ million), 1995-1997



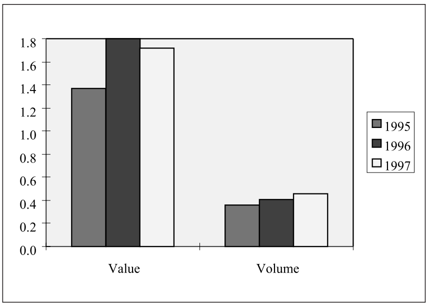
Source: Eurostat (1998)

Although imports of glassware and ceramicware decreased between 1995 and 1997, they remained the leading product groups, each representing 30 percent of total imported housewares. 46 percent of total imported metalware was represented by housewares of stainless steel. Glassware was mainly represented by toughened glass drinking glasses and glassware of a kind used for table and kitchen purposes, accounting for 34 percent and 20 percent of total imported glassware respectively.

EXPORTS	
Total exports (1997):	*US$ 1.7 billion*
Main product groups:	*Housewares of stainless steel, ceramic housewares other than porcelain or china, drinking glasses of toughened glass, plastics housewares*
Destinations of exports:	*Germany, France, USA, Spain, Switzerland, UK*

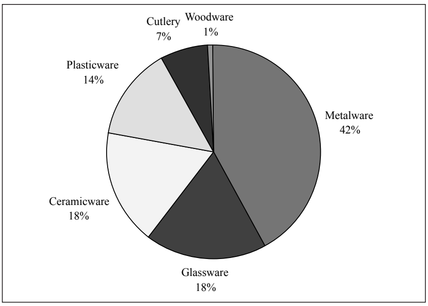
Exports of housewares from Italy increased from US$ 1.4 billion in 1995 to US$ 1.7 billion in 1997. The main destinations were Germany (14%), France (12%) and USA (11%).

Figure 4.21 Italian exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.22 Italian exports of housewares (% of total value), 1997



Source: Eurostat (1998)

The leading exported product group was metalware, followed by glassware and ceramicware. Exports of wooden housewares increased from US$ 9 million in 1995 to US$ 13 million in 1997.

Stainless steel housewares were the most important category of metalware exports amounting to US$ 288 million. Ceramic housewares of materials other than porcelain or china accounted for US$ 218 million in 1997, accounting for 73 percent of total exported ceramicware. Drinking glasses of toughened glass accounted for 41 percent of total Italian exported glassware, and glassware of a kind used for table or kitchen purposes 30 percent.

- **Distribution**

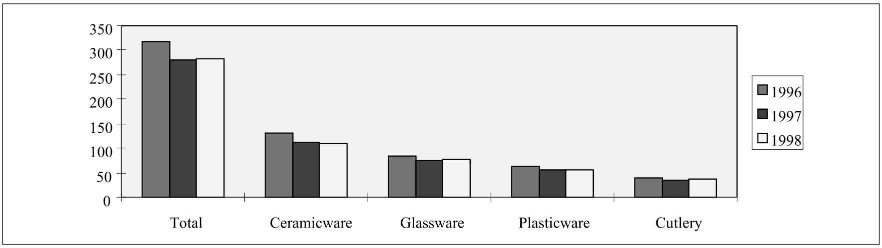
Hypermarkets, supermarkets and mass merchandisers are increasingly prominent in the distribution of housewares for everyday use. Specialists and department stores continue to account for the bulk of sales in terms of value because of the greater proportion of up-market products, such as bridal gifts, purchased via these outlets.

4.2.5 Belgium

- **Consumption**

Between 1996 and 1998, Belgian consumption of ceramicware, glassware, plasticware and cutlery decreased by 11 percent, to a total value of US$ 282 million.

Figure 4.23 Belgian consumption of housewares by product group (US$ million), 1996-1998



Source: Consumer Europe 1999

Ceramicware was the major product group, accounting for 39 percent of total consumption in 1998. In that same year, the consumption plasticware declined by 10 percent reaching US$ 57 million.

IMPORTS	
Total imports (1997):	*US$ 549 million*
Main product groups:	*Housewares of plastics, housewares of stainless steel, ceramic housewares, drinking glasses of toughened glass*
Main developing country suppliers:	*China, Thailand*

Between 1995 and 1997, imports of housewares into Belgium increased by 13 percent amounting to US$ 549 million in 1997. The largest supplier of housewares to Belgium was France, accounting for 22 percent of total housewares imports, followed by The Netherlands (16%) and China (13%). Developing countries took 19 percent of total Belgian imports for their account, representing mainly by China.

Table 4.6 Imports of tableware, kitchenware and household articles into Belgium (value in US$ thousand, volume in tonnes), 1995-1997

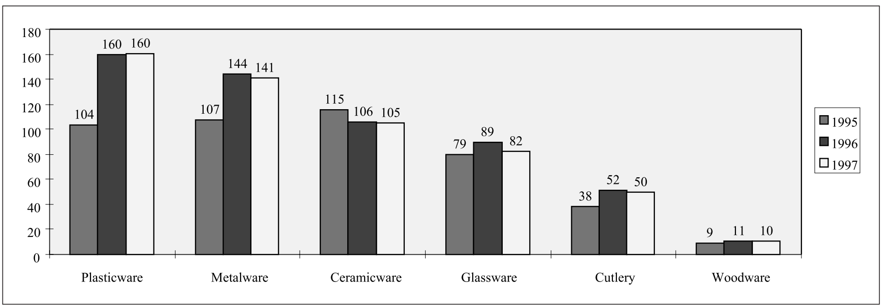
	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**485,831**	**104,345**	**561,174**	**111,589**	**548,710**	**122,945**
Extra-EU	**123,283**	**32,944**	**141,471**	**35,535**	**158,980**	**44,891**
Developing countries	**86,577**	**23,695**	**95,759**	**25,219**	**103,732**	**30,503**
Top 3 suppliers						
France	109,854	18,955	133,193	22,675	120,625	24,326
The Netherlands	81,431	17,652	94,601	20,732	86,760	19,769
China	41,194	10,990	52,888	13,927	72,746	19,704
Developing countries						
China	41,194	10,990	52,888	13,927	72,746	19,704
Thailand	16,214	4,949	9,909	2,358	9,064	2,724

Source: Eurostat (1998)

Glassware was the leading imported product group, representing 29 percent of total imports of housewares into Belgium in 1997. Other main product groups imported into Belgium were metalware (26%) and ceramicware (19%). Plasticware showed considerable increases during 1995 and 1997 (up 55%), in contrast to ceramicware (down 9%).

The product group housewares of stainless steel represented metalware, accounting US$ 76 million in 1997. Glasswares was represented by drinking glasses (US$ 37 million) and glasswares of a kind used for table or kitchen purpose of toughened glass (US$ 17 million).

Figure 4.24 Imports of housewares into Belgium by product group (US$ million), 1995-1997



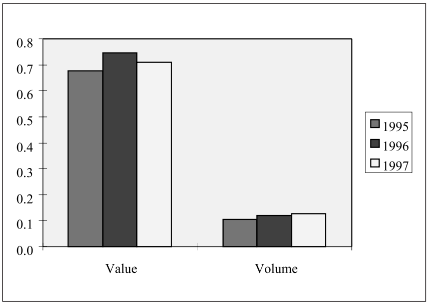
Source: Eurostat (1998)

In terms of value, exports of housewares from Belgium fluctuated between 1995 and 1997, when they amounted to US$ 709 million. Germany, France and The Netherlands were the three largest destinations for Belgian exports. These three countries together accounted for 68 percent of total Belgian houseware exports.

EXPORTS	
Total exports (1997):	*US$ 709 million*
Main product groups:	*Housewares of plastics, housewares of porcelain or china, housewares of stainless steel, drinking glasses of toughened glass*
Destinations of exports:	*Germany, France, The Netherlands, the UK and Italy*

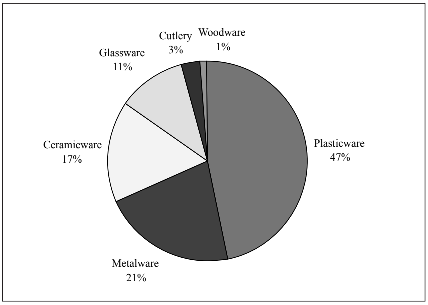
The main exported product group was plasticware, followed by metalware and ceramicware. Exports of cutlery and wooden housewares increased considerably between 1995 and 1997, reaching US$ 23 million and US$ 7 million respectively in 1997.

Figure 4.25 Belgian exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.26 Belgian exports of housewares (% of total value), 1997



Source: Eurostat (1998)

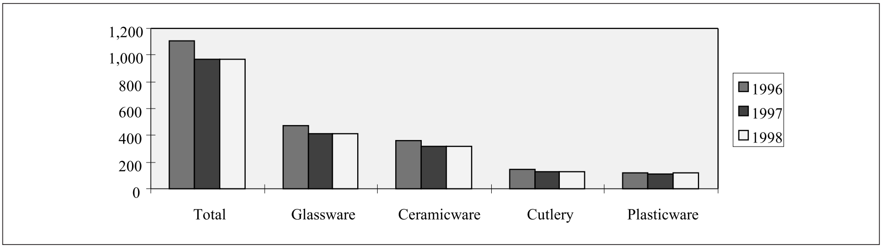
Metalware was mainly represented by housewares of stainless steel amounting to US$ 70 million in 1997. Housewares of porcelain or china accounted for 80 percent of total exported ceramicware. Exports of glassware from Belgium consisted mainly of drinking glasses (US$ 58 million) and glassware of a kind used for table and kitchen purposes of toughened glass (US$ 11 million).

4.2.6 Spain

- **Consumption**

The consumption of housewares in Spain amounted to US$ 971 million in 1998, after a decline by 12 percent between 1996 and 1998. Glassware accounted for almost half of the market. Ceramicware, the second most important product group, showed the same pattern as glassware and accounted for US$ 317 million in 1998.

Figure 4.27 Spanish consumption of housewares by product group, 1996-1998



Source: consumer Europe 1999

- **Production**

The Spanish market is dominated by national manufacturers like Monix, Magefesa, Gesainox and Fagor, which produce the full range of metal products.

The major producer and supplier of plastic housewares is Plasticos Tatay SA. The company manufactures and markets a range of kitchen, bathroom and garden accessories under the brand name Tatay.

IMPORTS	
Total imports (1997):	*US$ 463 million*
Main product groups:	*Drinking glasses of toughened glass, housewares of stainless steel, ceramic housewares, plastic housewares, housewares of aluminium*
Main developing country suppliers:	*China, Turkey, Brazil*

Total imports of housewares into Spain increased by 23 percent from US$ 376 million in 1995 to US$ 463 million in 1997. The three largest suppliers, Italy, France and Germany, together accounted for 54 percent of total imports into Spain. Developing countries were responsible for 16 percent of total imports and were mainly represented by China, Turkey and Brazil.

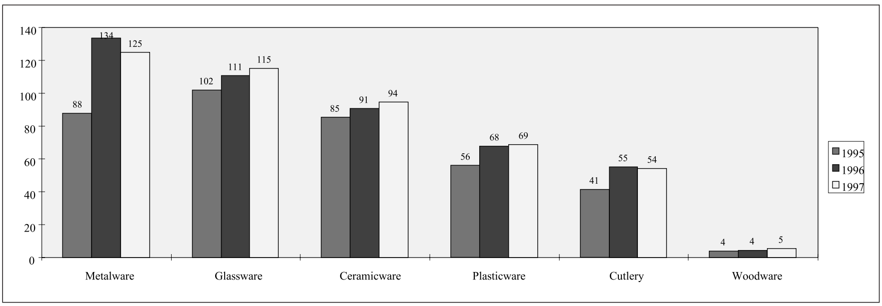
Table 4.7 Imports of tableware, kitchenware and household articles into Spain (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**376,408**	**90,957**	**462,026**	**111,977**	**462,940**	**148,048**
Extra-EU	**82,895**	**27,707**	**106,984**	**35,761**	**131,430**	**45,146**
Developing countries	**42,833**	**16,497**	**63,893**	**24,035**	**74,467**	**29,494**
Top 3 suppliers						
Italy	97,592	24,250	138,234	31,223	115,232	29,325
France	58,667	14,628	71,436	19,389	80,070	47,384
Germany	57,931	7,776	56,678	5,788	54,576	7,084
Developing countries						
China	20,456	5,805	32,175	9,656	36,980	11,215
Turkey	2,381	994	2,709	974	6,494	4,531
Brazil	1,717	1,222	1,875	1,390	4,070	3,026

Source: Eurostat (1998)

Although metalware imports decreased between 1996 and 1997, it remained the leading imported product group, representing 29 percent of total imported housewares. Glassware was the second largest imported product group (25%). Imports of woodware have shown increases during the last three years, and amounted to US$ 5 million (up 36%) in 1997.

Figure 4.28 Imports of housewares into Spain by product group (US$ million), 1995-1997



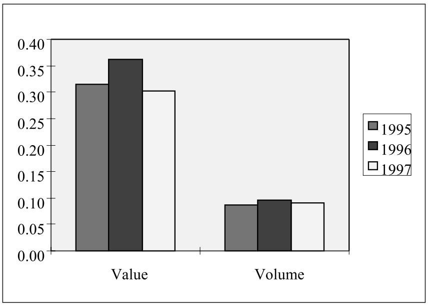
Source: Eurostat (1998)

Metalware was mainly represented by housewares of stainless steel, accounting for 45 percent of total imported metalware or US$ 56 million in 1997. Housewares of aluminium accounted for 25 percent of total metalware imports. Drinking glasses of toughened glass were the biggest category in the product group glassware, and imports amounted to US$ 63 million.

EXPORTS	
Total exports (1997):	*US$ 315 million*
Main product groups:	*Housewares of stainless steel, housewares of plastics, housewares of iron or steel (enamelled), glassware of a kind used for table or kitchen purposes of toughened glass*
Destinations of exports:	*France, Portugal, Germany, USA, Italy, Switzerland, Belgium*

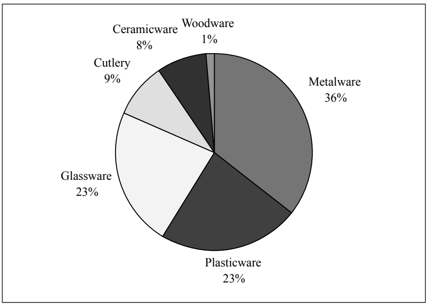
Exports of housewares from Spain decreased by 17 percent from US$ 362 million in 1996 to US$ 302 million in 1997. The main destinations were France (23%), Portugal (11%), Germany (11%) and USA (9%).

Figure 4.29 Spanish exports of housewares (value in US$ billion, volume in million tonnes)



Source: Eurostat (1998)

Figure 4.30 Spanish exports of housewares (% of total value), 1997



Source: Eurostat (1998)

The leading exported product group was metalware. Although exports of plasticware and glassware declined considerably between 1996 and 1997, they remained the second largest exported product groups.

Metalware was mainly represented by housewares of stainless steel and housewares of enamelled iron or steel, exports of which amounted to US$ 46 million and US$ 35 million respectively in 1997. Glassware of a kind used for table or kitchen purposes of toughened glass was responsible for 42 percent of total exported glassware from Spain. The other major export product within glassware was drinking glasses of toughened glass which accounted for 37 of total exported glassware.

- **Distribution**

Hypermarkets (Pryca, Continente, Al Campo), supermarkets and mass merchandisers are increasingly prominent in the distribution of housewares for everyday use. In Spain, this type of distribution channels accounted for more than 50 percent of retail sales by value.

5 ACCESS TO THE EUROPEAN UNION MARKET

5.1 Quality and grading standards

Exporters will must comply with legislation and regulations in order to be able to export to the European Union. This means that they have to understand and comply with European legal restrictions as well as the preferences of their potential customers.

- **Health and safety**

Health and safety issues are becoming increasingly important in the EU. The EC Directive on General Product Safety 92/59 (commonly known as the Product Safety Directive) was approved by the EC Council on June 29, 1992. The directive became fully operational in June 1994 and applies to the safety of products from the time that they are first placed on the EU market and extends throughout the product's foreseeable life. The directive covers both new and reconditioned products, though not second-hand products clearly identified as antiques or in need of repair or reconditioning. The EC has felt the need to introduce the obligation for producers and distributors to trade only in safe products, in the framework of completing the unification of the internal market. Although product safety directives already existed for many product categories, a number of products was not covered in this way at European level.

The directive requires that products intended for consumers do not present any unacceptable risks and that potential users of such products are adequately warned about any potential risks. Guidance on what is a safe product is contained in the directive.
In general, the Product Safety Directive will not apply to those safety aspects of a product or category of products already covered under an EC Directive. As there are no specific Directives for Housewares, the Product Safety Directive applies to this product group.

- **Standards**

Standards are a principal element of the European Union's Single Market Program.
The EU is creating harmonised, European-wide standards in key product sectors to replace the many thousands of differing national standards. For regulated products, the EU Commission has set out the guidelines for harmonised European-wide standards in a number of directives, commonly known as 'New Approach Directives'. The harmonisation of technical standards for regulated products is centred on the health and safety aspects of these products, and is intended to produce minimum safety and health levels throughout the Union. Not all product requirements are harmonised as defined on an EU-wide basis. Non-harmonised products and sectors still exist where member state regulations remain as mandatory requirements.

The materials used for china (porcelain) ceramic products, glassware, pots, pans and other kitchen utensils which may come into contact with food, are also subject to European Norms, issued by the European Union. On important norm is that all articles which come in contact with food, should be free of lead and cadmium.

Table 5.1 European Norms concerning housewares

Norm number	Title	brief content
NEN-EN 13127-2 1998	Materials & articles in contact with food (cutlery and tableware)	Material and performance requirements for table, cutlery made of precious metals and their alloys, esp. silver.
NEN-EN 12156:1995	Materials & articles in contact with food (cutlery and tableware)	Material and performance requirements for table and decorative hollowware, and cast attachments., made from metals which are lightly silver-plated and protected by lacquer.
NEN-EN 13127-8:1998	Materials & articles in contact with food (cutlery and tableware)	Material and performance requirements for silver table and and decorative hollowware, intended for use at or upon the dining table.
ISO/DIS 6486-2:1998	Ceramic items, glass-ceramic items and glass items in contact with food	Permissible limits for the release of lead and cadmium from ceramic ware, glass-ceramic ware, and glass flatware intended to be used in contact with food, but excluding porcelain enamel articles.
ISO/DIS 6486-1:1998	Ceramic items, glass-ceramic items and glass items in contact with food	Test method for the release of lead and cadmium for ceramic ware, glass-ceramic ware, and glass flatware intended to be used in contact with food, but excluding porcelain enamel articles.
NEN-EN 1900:1998	Materials & articles in contact with food (Non-metallic cutlery and tableware)	Defining terms related to certain materials for non-metallic tableware in contact with foodstuffs.
ISO/DIS 7086-1:1998	Glass hollowware in contact with food.	Test method for the release of lead and cadmium from glass hollow-ware hollowware which is intended to be used in contact with food.

continued

Norm number	Title	brief content
ISO/DIS 7086-2:1998	Glass hollowware in contact with food.	Permissible limits for the release of lead and cadmium from (see above).
ISO 8442-1: 1997	Materials & articles in contact with foodstuff.	Material and performance requirements and test methods for metal cutlery and related implements intended for use in the preparation of food.
NEN-EN 8442-2:1997	Materials & articles in contact with food (Cutlery and silver table)	Material, performance requirements and test methods for table cutlery applicable to stainless steel cutlery and to silver-plated nickel silver, or silver-plated stainless steel, cutlery.
ISO/ 8442-4:1997	Materials & articles in contact with food (Gold plated cutlery)	Requirements for gold plated cutlery.
NEN-EN 1900:1998	Materials & articles in contact with food (non-metallic cutlery and tableware	Defining terms related to certain materials for non-metallic tableware in contact with foodstuffs.
NEN-EN 12156:1995	Materials & articles in contact with food (cutlery and decorative tableware that is lightly silvered and protected by lacquer)	Material and performance requirements for table and decorative hollowware, and cast attachments made of metals which are lightly silvered and protected by lacquer.
NEN-EN 13127-7:1998	Materials & articles in contact with food (Cutlery and tableware)	Specification of material and performance requirements for table, cutlery made of precious and their alloys, especially silver.
NEN-EN 12127-8 :1998	Materials & articles in contact with food (table silver and decorative tableware)	Specification of material, performance and marking requirements for silver table and decorative hollowware, intended for use at or upon the dining table. continued

Norm number	Title	brief content
NEN-EN-ISO 8442-1: 1998/C1:1999	Materials & articles in contact with food (Cutlery and table silver)	Material and performanc requirements for cutlery for food preparation.
NEN-EN-ISO 8442-1: 1998	Materials & articles in contact with food (Cutlery and table silver)	Material and performance requirements and test methods for metal cutlery and related implements intended for use in the preparation of food.
NEN-EN-ISO 8442-2: 1998 (/C2:1999)	Materials & articles in contact with food (Cutlery and table silver)	Material and performance requirements and test methods for table cutlery made of stainless steel, silver-plated nickel silver or silver-plated stainless steel.
NEN-EN-ISO 8442-3: 1998	Materials & articles in contact with food (Cutlery and table silver)	Material and performance requirements and test methods for silver-plated table and decorative hollowware made principally from metals, and intended for use at or upon the dining table.
NEN-EN ISO 8442-4: 1998 (/C2:1999)	Materials & articles in contact with food (Cutlery and table silver)	Requirements for gold plated cutlery.
NEN-EN ISO 8442-5: 1999	Materials & articles in contact with food (Cutlery and table silver)	Specification of the sharpness and edge retention of knives which are produced for professional and domestic use in the preparation of food of all kinds, specifically those knives intended for hand use.
NEN-EN-ISO 8442-6: 1999	Materials & articles in contact with foodstuffs (Cutlery and table silver)	Material and performance requirements for table and decorative hollowware, and cast attachments, made from metals which are lightly silver-plated and projected by lacquer.

continued

Norm number	Title	brief content
ISO/DIS 8442-7:1998	Materials & articles in contact with foodstuffs (Cutlery and table hollowware)	Material and performance requirements for table cutlery made of precious metals and their alloys, especially silver.
ISO/DIS 2142-8:1998	Materials & articles in contact with foodstuffs (Cutlery and table hollowware)	Material, performance and marking requirements for table silver and decorative hollowware, intended for use at or upon the dining table.
NEN 3032:1966	Testing requirements for food and drinking articles	Material and performance for food and drinking articles made of plastics.

Source: N.N.I. (1999)

Exporters are strongly advised to check the exact content of these European norms, since this table only gives an indication of the norms that exist in this product range. For more detailed information please contact one of the national institutes for standardisation (See Appendix 3 for addresses). Information on these regulations and standards can also be obtained through the Internet. Useful Internet sites are *http://www.cenorm.be* of the European Committee for Standardization (CEN), and *http://www.iso.ch* of the International Organisation for Standardisation (ISO).

Hallmarks

In the Netherlands, the Keurmerkinstituut tests a wide range of consumer products at the request of manufacturers and, among others, the Dutch Association of Housewives (*Nederlandse Vereniging van Huisvrouwen*). If a product passes the test a seal is issued with the words "*Goedgekeurd keurmerkinstituut*" ("Approved Hallmark-institute"). There is also a special hallmark for environmentally sound products, named "*Milieukeur*".

Most European countries have their own national hallmark. There are also overall European Hallmarks for environmental sound products, eco-labels, which are created for various product groups. More information on these national hallmarks and ecolabels can be found on the internet site: *http://www.cenorm.be* (see also Section 5.3).

5.2 Packaging, marking and labelling

Packaging is a part of the presentation of a product and stays with it right until the customer takes the product from the shelves in the retail shop. It is not to be confused with packing, which is the material added consignment for safe transportation to the importer. The importer might decide to leave the packing on, or re-pack into smaller boxes for distribution to the retail shops.

Packaging is a vital part of successful export operations. Without packaging, products could not be economically transported over long distances. Without packaging, most products would not be in a condition to be sold after transport. As it helps products from developing countries to sell in industrialised countries, packaging must be considered an important aspect of the quality of the product, and of the exporter. The packaging of any product has to perform several tasks:

- *The packaging has to contain the product for the total duration of the transport and distribution chain.*
- *It has to protect the product from getting broken from the time of manufacturing until the product reaches its final user. This period of time may be several months and involve several times of handling and storage.*
- *The packaging has to make the transport and handling of the product as easy as possible. Manual handling in Europe is expensive, which means that packages that are easy and quick to handle are more competitive than others. For the packaging of housewares it could be wise to try and design a packaging with outer dimensions of 60 x 40 cm or 40 x 30 cm. This allows proper utilisation of pallet space in the popular dimensions. Furthermore, packing in sturdy corrugated boxes with a maximum weight of 25 kg per carton, is recommended.*
- *The packaging has to inform various people in the transport and distribution chain about the 'identity', destination of the product, and how it should be handled and stored, recycled or disposed of. If the product is sold in a retail package, this has to contain information related to the product, producer, product handling.*
- *It is also the task of the packaging to make the transport and distribution of the product economical. This requirement means that the total cost has to be considered - not only the price of the packaging. Total cost includes all costs from the time when the product is manufactured until the product reaches the end-user and the empty package is recycled or disposed of. When goods arrive at their destination, packaging is the first thing that the buyer sees. If the package looks untidy, is damaged or dirty, the first impression of the products and of the manufacturer is one of low value.*

A clean, correctly marked package that is easy to handle gives the impression of good quality of the products and the manufacturer. Thus, the package can be considered the 'business card' of the manufacturer. The target in packing for the export could be recapitulated as follows: 'As good as necessary, as economically as possible'. To achieve this goal, the exporter needs to really understand what happens to the products and packages after they leave their premises.

Specific remarks concerning housewares made of various materials
Ceramicware
Nowadays, there is a change away from the pre-packed sets, to the sales of individually selected sets. This requires packaging which is easy for the retailer to handle and unpack and finally repack in smaller carton boxes, each item usually wrapped in thin paper. Earthenware requires better cushioning in transit than chinaware, specifically to protect it from chipping at the edges.
Glassware
Glasses are often sold in sets of three, four or six pieces especially in the low and middle price range. The manufacturer should pre-pack these sets either in full carton boxes or in carton sleeves. A carton base with shrink foil to hold the set together is also used for cheaper items.
Metalware and cutlery
These products can usually be shipped and transported without any risk in carton boxes. However, care should be taken that the risks of dents are minimised. With cutlery, the risk of scratches should be minimised by wrapping the individual items in soft paper, or plastic.
Plasticware
In generally, no special precautions have to be taken for shipment of these products. However, protection against scratches, especially on glossy articles, is important. Depending on the size and weight of the item, carton boxes are recommended.
Woodware
In the case of wooden articles it is important to keep in mind that the total weight of the boxes does not exceed approximately 25 kg. Depending on the type of wood and its finish, care should be taken to prevent scratches during transport, by wrapping the articles individually in soft paper and/or plastic.

All in all, packaging must be strong enough to protect the product from breakage and/or damage. The type of consumer packaging and labelling will be determined largely by the requirements of the buyer. In addition, the manufacturer must ensure that labelling requirements (in the national language, clearly visible, easy to read and non-erasable) are met. For more detailed information please refer also to CBI's "*Packaging manual*". Furthermore, the use of the pictorial marking FRAGILE is appropriate for porcelain and glassware. The symbol shows a broken glass. Sometimes other symbols are used to indicate the properties of the product, such as flame-proof or food-safe.

The most important regulations regarding packaging and labelling of products for sale in the European Union are the directives issued by the Council of the European Commission. Environmental considerations are playing an increasing role in determining the legal requirements for packaging and labelling. In early 1995, the EU Council of Ministers approved Directive 94/62/EC on Packaging and Packaging waste which sets common objectives for all member countries for the recovery and recycling of packaging.
The Directive establishes:

- Recovery and recycling targets;
- Essential requirements and conformity symbols for all packaging; and
- Broad criteria for national waste management systems.

By the year 2000, the member states (excluding Ireland, Portugal and Greece) are supposed to recycle between 50 and 65 percent of their packaging waste. This directive should have been implemented in the national legislation of the EU member states before June 1996. Although this did not occur, serious proposals for implementation were submitted in The Netherlands, Germany, Belgium and France. A new European Directive on packaging is expected in June 2001. For the time being, packaging legislation differs considerably between EU member states. Packaging legislation will, however, become more stringent in the near future. Since alterations in the environmental policy follow each other at a rapid pace, exporters are advised to ask the importer about the latest regulations and/or requirements related to packaging.

It is important that exporters from developing countries are aware of these regulations and take appropriate measures in order to become or remain interesting trade partners for European importers. Sound marketing requires taking the obligations for the importer into consideration, which means that packaging (transport packaging, surrounding packaging and sales packaging) materials should be limited and re-usable or recyclable. Otherwise, the importer will be confronted with additional costs, thus reducing the competitiveness of the exporter.

For more detailed information please refer to CBI's publications "*Packaging manual*" and "*Eco Trade manual*."

5.3 Trade-related environmental measures

Care for the environment and the conscious use of available resources is a major issue in The Netherlands and in other European countries. Besides government actions (legislation and regulation), a strong consumer movement is noticeable especially in the northern parts of the EU (Scandinavia, Germany and The Netherlands). "The environment" has become more than a trend.

- **Ecolabelling**

In order to make ecologically sound products easily recognisable for consumers, Ecolabels have been introduced at EU level. These labels indicate that the product has a reduced impact on the environment compared to similar products. The assessment of the criteria, to which products with an Ecolabel have to comply, involves taking into account all phases of the products' life cycle and their potential environmental impact. The scheme is based on Council Regulation (EEC) No. 880/92. At the moment, no Ecolabel exists for housewares.

- **Sustainable development**

The main tools available to manufacturers for assessment and change in their products and processes are:

Life Cycle Assessment (LCA)
LCA is also called the "cradle to grave" approach. Manufacturers (have to) look at the total environmental aspects of their product. A material which is very environmentally sound when the product is used, may be very polluting, energy consuming or difficult to break down in the excavation, refining, production or discard stage of the life cycle. Thus the use of a material which is less environmentally sound when the product is used, could be justified because the negative impact on the environment is less in another stage of the life cycle. On a European scale the European Commission has decided that the LCA method will be the technique used to determine a product is produced in an environmentally conscious way or not.
Cleaner production
Cleaner production is the conscious use and production of (existing) products and processes to prevent the pollution of air, water and land. This means that a careful look is taken at the overall processes and waste materials. A process liquid may be re-used instead of being discarded, simple measures may increase the efficiency of a machine, toxic process liquids may be replaced by non-toxic etc.
Ecodesign
Ecodesign basically means giving the environment a place in (new or improved) product development. This means that during product design, efforts are made to reduce the use of raw materials, minimise waste, energy used and toxic emissions. This will ultimately lead to a reduction of raw materials and energy used. Although these tools are used by manufacturers to reduce the impact of their product(ion) on the environment, it is known that other benefits can arise, like a reduction in product(ion) costs.

If manufacturers use tools like LCAs, cleaner production and Ecodesign properly, their products will be more environmentally sound than the products of their competitors. This will give them a marketing advantage over the competition, because consumers increasingly take the environmental soundness of a product into account. For the manufacturer to prove this, there are norms with which he can comply or hallmarks for which can he apply.

- **Environmental standards**

While environmental labelling procedures are aimed purely at the products (i.e. the product bearing a label has a lower impact on the environment than other similar products), environmental management standards give the manufacturer/exporter the opportunity to show external parties that he is manufacturing in an environmentally conscious way. At the moment, two norms are operational:

• **ISO 14000**	The ISO 14000 Environmental Management standard was published in September 1996. The International Organisation for Standardisation will, in the short term, not specifically address the implementation difficulties which SMEs and companies in developing countries may encounter. Other organisations, such as the International Network for Environmental Management, have stated that they will start working on development manuals to assist in the implementation of ISO 14000.
• **EMAS**	The Ecological Management Audit Scheme is the standard introduced by the European Commission. Although it is operational, there are still uncertainties as to how ISO 14000 certified companies can obtain EMAS registration.

- **Product related issues**

Regarding environmental aspects, tableware, kitchenware and household articles form a complicated product group. Not only is there a wide variety of products, there is also an extensive range of materials used. The main materials used for production are wood, metal, glass, ceramics and plastics. Each of these substances and their environment impact are discussed briefly below, and suggestions are made as to how to reduce the impact on the environment can be reduced.

Wood

Over-exploitation of natural forests and the cutting of large areas of trees results in erosion and the formation of mono-cultures (plants of one species). Furthermore, the use of herbicides and pesticides and chlorinated fertilisers in this first stage of wood production causes severe damage to the environment and should be avoided.
In further processing of wood, the drying stage and the impregnation of wood have the biggest effect on the environment. The use of (too much) energy is the largest environmental threat in the drying process. During the impregnation and storage of wood, several substances can be emitted into the air, and waste water is released.
To reduce the negative impact on the environment, polluted condensation and water can be re-used or treated. The emissions of impregnation materials during storage can be reduced by applying a closed process, after treatment with steam or the use of modified creosote oil.

Metal

The stages in the production of metal (products) which have an impact on the environment are extraction of raw materials, melting and refining. The use of energy for the melting process is extremely high and a wide range of substances is emitted into water and air.
Cleaner technologies are therefore aimed at the reduction of emissions and saving energy. The raw metal can be moulded by pressing, extrusion, hydromechanical means and cut or punch. Emission of substances during the welding process, to connect metal parts, depends on the method used.

Glass

Several substances are emitted into the environment during the production of glassware. The most important source of emission into the air is the melting furnaces. Heavy metals are released into the air during the melting of the raw materials. These emissions can be reduced through the cleaning of the gases.
Heavy metals, sulphate, phosphate and mineral oil are released with waste water, when the glass is cooled. A closed cooling system and the re-use of cooling water can restrict the emission of substances into the environment.
The melting of raw materials requires a lot of energy. The use of energy can be reduced by using recycled glass.

Ceramics

The most important environmental impact of ceramicware occurs during the production process, especially during the firing process. Because ceramic products must be heated twice (or more), the use of energy in the ceramic industry is extremely high. Energy can be saved by using fast-firing kilns, utilisation of waste heat and energy-saving ways of heating. Furthermore, during the firing process several gases are emitted into the air.

continued

The most important gases are: fluorines and chlorines, sulphur oxides, nitrogen oxides, carbon oxides. The amount of compounds emitted depends strongly on the composition of the raw material used. The reduction of the emission of toxic gases can be achieved by adaptation of the production process. The switch-over to fast-firing kilns not only saves energy, it also reduces the emission of gases such as fluorines, chlorines and sulphur oxides.

Plastics

Many harmful substances are used in the production process of plastics. The following gives an overview of harmful monomers and raw materials in the production of polymers.

Harmful substances used for the production of several polymers

Polymer	*Harmful substances*
PS	*Benzene, Ethyl Benzene, Styrene*
PVC	*Chlorine, 1,2 Dichloro-ethane, Vinylchlorine, Mercury*
PUR	*Propene and Ethene oxide, Ethylene glycol, Adipine-acid, Phosgene, Toluene di-iso Cyanate TDI, Toluene diamine, Toluene, Diphenylmethane, Isocyanate MDI, Benzene*
ABS	*Arylonitrile, Butandiene, Styrene*
PC	*Sisphenol A, Phosgene, Dichioromethane, Pyridine*
POM	*Formaldehyde, Ethene oxide, Diethylene ether*
PPE	*2,6-Dimenthylphenol*

Many different additives are used in the production process of plastics. Many of these additives are harmful to the environment, especially pigments, fire retardants and the heat stabilisers. Additives which are not burned in the waste disposal installation, like heavy metals, will end up in the environment. The pigments cadmium and lead-chromate and the fire retardant antimony are non-degradable substances with great impact on the environment. The production of plastic is more environmentally sound when manufacturers use less heavy metals, organobromide and organochlorine compounds. Research is being conducted to develop substitutes which are less damaging to the environment.

Recycling of plastics

The re-use of plastics helps to diminish pollution. The environmental effects of plastics differ according to various types of plastics and the type and quantity of additives used. ‘Primary waste plastics’ plastics of which the quality is almost as high as that of virgin plastics, are generated within the plastics-producing and goods-manufacturing sectors themselves. The term ‘secondary waste plastics’ refers to waste plastics from sources other than the industrial ones, and are impure, i.e. they may be contaminated and often consist of mixtures of various types of plastics.

Resource recovery reduces the amount of raw materials, such as oil and energy needed in production processes, and may reduce the emission of substances into the atmosphere. Waste plastics from unknown sources should not be used for toys, since it is impossible to know whether or not they are contaminated.

continued

Use of pigments in tableware, kitchenware and household articles
Pigments may contain heavy metals, such as chromium, copper, lead and cadmium, which are highly toxic to humans. All articles, which come in contact with food, should be free of lead and cadmium. Lead, in one form or another, has been used for a very long tine as an exceedingly useful flux in glazes and stains. Cadmium is widely used as a pigment in ceramics, glass and plastics
Heavy metals used as pigments can often be replaced by less harmful substances.
For example, cadmium can be replaced by preasodynium. Many other less harmful pigments are under development.

- **Information**

For detailed information about environmental aspects relevant to trade, please refer to the Eco Trade Manual which can be obtained from CBI. Information can also be obtained through GreenBuss®, CBI's on-line database for Environment, Trade and Technology.

5.4 Tariffs and quotas

In general, all goods entering the EU are subject to import duties. External trade conditions in the European Union are mostly determined by EU regulations. The level of the tariffs depends on:

- country of origin; and
- product.

If there is not a special trade agreement in force, the general import tariff (conventional duty) applies. The following table presents the conventional import duties for the housewares discussed in this study.

Table 5.2 Import tariffs by product group, tariffs as a percentage of CIF value, excluding duties and VAT

HS codes	Product group	Conventional import duty (%)
	PLASTICWARE	
39 24	**Tableware, kitchenware, other household articles and toilet articles of plastics**	
	Whole product group 39	*6.5*
	WOODWARE	
44 19 00	**Tableware and kitchenware of wood**	
00 10	*Of tropical wood*	*0*
00 90	*Of other wood*	*0*
	CERAMICWARE	
69 11	**Tableware, kitchenware, other household articles and toilet articles of porcelain or china**	
	Whole product group 6911	*12*
69 12 00	**Ceramic tableware, kitchenware, other other household articles and toilet articles, other than porcelain or china**	
00 10	*Of common pottery*	*5*
00 30	*Stoneware*	*5.5*
00 50	*Earthenware or fine pottery*	*9*
00 90	*Other*	*7*
	GLASSWARE	
70 13	**Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes**	
	Whole product group 7013	*11*
73 23	**Table, kitchen or other household articles and parts thereof, of iron or steel**	
	Whole product group 7323	*3.2*
74 18	**Table, kitchen or other household articles and parts thereof, of copper**	
19 00	*Table, kitchen or other household articles and parts thereof*	*3*

continued

HS codes		Product group	Conventional import duty (%)
76 15		**Table, kitchen or other household articles and parts thereof, of aluminium**	
	19	*Table, kitchen or other household articles and parts thereof*	*6*
		CUTLERY	
82 11		**Knives with cutting blades, serrated or not (including pruning knives), and blades thereof**	
	10 00	*Sets of assorted articles*	*8.5*
	91	*Table knives having fixed blades*	*8.5*
	30	*Table knives with handle and blade of stainless steel*	*8.5*
	80	*Other*	*8.5*
	92 00	*Other knives having fixed blades*	*8.5*
	93 00	*Knives having other than fixed blades*	*8.5*
	94 00	*Blades*	*6.7*
82 15		**Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware**	
	10	*Sets of assorted articles containing at least one article plated with precious metal*	
	10 20	*Containing only articles plated with precious metal*	*4.7*
	10 30	*Of stainless steel*	*8.5*
	10 80	*Other*	*4.7*
	20	*Other sets of assorted articles*	
	20 10	*Of stainless steel*	*8.5*
	20 90	*Other*	*4.7*
	91 00	*Plated with precious metal*	*4.7*
	99	*Other*	
	99 10	*Of stainless steel*	*8.5*
	99 90	*Other*	*4.7*

Trade with countries outside the EU is governed by a number of special agreements. EFTA country members of the so-called European Economic Area (EEA) with the EU, enjoy tariff-free entry into EU markets for their industrial products. The European Agreements between the EU and the Central and Eastern European countries (CEECs) of Hungary, the Czech and Slovak Republics, Poland, Bulgaria and Romania aim to achieve bilateral free trade within ten years. Many industrial products already enjoy duty free access to EU markets.

The most important agreement for developing countries is the General Agreement on Tariffs and Trade (GATT), within which the European Union's Generalised System of Preferences (GSP) is operated. The GSP scheme allows many industrial goods to be imported from listed developing countries at a zero tariff rate. Between 1995 and 1998, the EU operated the renewed GSP (RGSP), in which the tariff preference for industrial products from developing countries is rendered in terms of a reduction of the General Customs Tariff (GCT) without quantitative restrictions.

In September 1998, the European Commission submitted a proposal to the European Council for a new ruling to cover the period 1 January 1999 to 31 December 2001. The new scheme leaves the basic product and country coverage unchanged.

The RGSP contains four lists giving different basic tariffs:
- The highly sensitive industrial products (textiles, clothing, ferro-alloys), for which the tariff is 85 percent of the GCT, which indicates a preferential margin of 15 percent;
- The sensitive industrial products with a tariff of 70 percent of the GCT (preferential margin 30 percent);
- The semi-sensitive products with a tariff of 35 percent of the GCT (preferential margin 65 percent);
- The non-sensitive products with a tariff of 0 percent of the GCT (preferential margin 100 percent).

Textiles and clothing as well as agricultural products like a number of citrus fruit are among the highly sensitive goods. The categories sensitive and semi-sensitive include certain chemical products, fertilisers, dyes, rubber products, wood products, footwear, leatherware, metal products, electrical appliances, optical and precision instruments, ceramics, glassware and precious stones. However, it does not mean that all chemical, wood, rubber products etc. are classified as (semi) sensitive. It depends very much on the specifications of the product whether it is classified as (semi) sensitive or non-sensitive. Each individual product needs to be checked as to which tariff applies.

With the replacement of the GSP by the Renewed General System of Preferences (RGSP) in 1995, the amount of preferential imports is no longer tied to quantitative limits. Also, two new mechanisms have been introduced; the gradation and solidarity mechanism. These mechanisms are used to make distinctions between developing countries (favoured nations).

1. **The gradation mechanism**, which distinguishes between favoured nations and between product categories. In product categories where countries are considered to be sufficiently competitive the tariff preference will be lost during the period of the RGSP (4 years). For countries with a GNP (Gross National Product) higher than US$ 6,000 per head (e.g. Singapore, Hong Kong, South Korea, Saudi Arabia, Libya, Brunei) the preferential margin of the product categories was halved as from 1 April 1995 and, as from 1 January 1996, the tariff was raised to 100 percent of the GCT. For countries with a per capita GNP below US$ 6,000 the preferential margin of the product categories was halved as from 1 January 1997 and the full tariff rate was applied after 1 January 1998.
2. **The solidarity mechanism**, which will totally abolish the preferential margin as from 1 January 1996. The criterion for this mechanism is that when the export to the EU of some favoured nations in a certain product category accounts for more than 25 percent of the export of all favoured nations the tariff preference of that product category for the EU will no longer apply for that country. This will apply to only four favoured nations (China, Libya, Chile and Brazil). Some favoured nations, especially China, may be hit by both mechanisms.

To obtain the discount on duty or zero percent duty in the General System of Preferences, the exporter must provide a certificate of origin (form A). Exporters from ACP countries must provide the EUR 1 certificate. Both GSP and ACP countries also have to comply with the criteria set for obtaining "origin" status, which stipulates that a fixed percentage of the product value has to be added in that particular country (or another GSP, resp. ACP country). In the case of a product being merely assembled, the exporter will not qualify for preferential treatment.

For exact and up-to-date information on import duties one should contact the local Chamber of Commerce or Trade Promotion Office. Information can also be obtained from the Chamber of Commerce in Rotterdam, the European Commission or the Customs department (see Appendix 9 for addresses). Another option is to consult the web-site of the Netherlands customs (*http://www.douane.nl/taric-nl*) where the General Customs Tariffs for all products are listed, including exceptions that are made for import from specific countries. This information, written in the Netherlands language, is up-dated everyday. The Netherlands Customs Department expects to present the information in the English language by 2001.

5.5 Terms of the trade

5.5.1 The contract

A contract is not necessarily a document. If two parties agree on something verbally, this verbal agreement is a contract according to most European laws. However, since in case of a verbal contract it is very difficult to prove that something in particular has been agreed upon, the agreement should however be confirmed in writing. Standard, world-wide accepted contracts are most common in the trade of tableware, kitchenware and household articles of wood, metals, glass and plastic.

The contract

Details which must be mentioned in a contract are:
1. The contract parties: The seller, the buyer, the broker and/or buying/selling agent. Of course all names and addresses must be correctly spelled.
2. The product, price and quality of the product are sufficiently specified, so that no misunderstandings can arise.
3. The quantities must of course be mentioned. If the buyer and the seller agree to more or less than the agreed quantity, this has to be specifically mentioned.
4. The delivery terms are mentioned according to the description specified in the Incoterms 2000 (available at the International Chamber of Commerce).
5. The payment terms must be spelled out in detail.
6. The delivery time is a vital piece of information on which the seller and the buyer will have to agree.
7. Packaging details, including measurements and weights.
8. If one of the parties has negotiated special conditions, this has to be mentioned in the contract.
9. What will be done if the two parties disagree with each other? To which arbitration court / district will they go?

Trading relations between exporter and importer are based on trust and can only be built up by meeting the high expectations of the importer. If an importer finds that the product does not meet his expectations, this will immediately backfire on the business relationship with the exporter.

5.5.2 Payment methods and delivery terms

The determination of payment conditions for a regular export transaction is part of the package of negotiations between seller and buyer, who actually have more or less opposing interests. The seller wants to have the largest possible guarantee of financial coverage for the goods he has to supply according to his sales contracts. The buyer wants to be sure about availability, quantity and quality of the goods he buys, before he pays the agreed price.

After deduction of the commission and expenses for handling, transport etc., importers generally transfer payment within one week A Letter of Credit is common practice, but is often considered cumbersome and prevents the option of retaining the money if the consignment does not prove to be as good as expected. When relations are established, cash against documents (CAD) is also done. After the sale is concluded, the importer can determine the levy with the Customs, and pay a deposit. If the products are not imported within two months after this has been done, the fixed levy is not valid anymore and the importer loses his deposit. This means that on-time delivery is vitally important. Another possibility for the importer is to pay the current levy at Customs clearance.

General methods and terms of payment

Clean payment
The process is fast and reliable, depending on the credit worthiness of the importer. The bank carries out the transactions through swift electronic data system and the transfer costs are not very high.

Documents against payment (D/P)
Also known as cash against documents (CAD). The buyer takes possession of the goods only after payment. Although this method is not very popular, it is very safe and the costs amount to one pro mille. One can also make use of a 'documents against acceptance of a bill of exchange'. However, the bill of exchange is not commonly used in the European Union and it does not guarantee that the bill will be paid; it is less secure than the D/P.

Letter of Credit (LC)
The irrevocable LC is very often used in the beginning of a business relation when the importer and exporter do not know each other very well yet. The LC is irrevocable and will always be paid. The costs are higher when compared to the D/P method, namely five pro mille. This method is widely used in the European Union when dealing with exporters from outside Europe.

Bank guarantee
The buyer's bank will present a bank guarantee for the amount of the invoice.

Cheques
Bank guaranteed cheques are generally not a problem though cashing may take some time, up to six weeks. Not all personal cheques are accepted.

Payment on consignment basis
Payment on consignment basis is mostly used in the trade of perishable products, for example fresh fruit and vegetables. The products are sold at a predetermined price after a mutually appointed arbitrary person (General Super Intendance Company (GSC)) has controlled the quantity, quality and other aspects of the products at the moment of acceptance/sale. If the products do not meet the conditions as described in the contract, the contract is not valid and, depending on the conditions of the contract, prices are generally adjusted. An open account is used to make the payment after 14 days as from acceptance/sale.

It is recommended that quotations to European customers should be made on a CIF basis. However, supplier and importer are free to negotiate and agree whether quotations and subsequent trade are based on CIF or FOB prices.

Most common delivery terms:

- **FOB** (*Free On Board*): The buyer arranges for transportation and insurance. FOB must specify the port of departure.
- **CFR** (*Cost & Freight*): The exporter pays the freight, the buyer arranges for the insurance.
- **CIF** (*Cost, Insurance & Freight*): The exporter pays the freight and the insurance.

5.5.3 Business practice

In general, the following steps are recommended when trying to establish business contacts:

Assuming that the exporter has prepared himself well at home by studying the market possibilities (for example by using this market survey and contacting useful addresses and internet-links mentioned in various appendices) the next step for an exporter who wishes to enter the EU market is to select potential trade partners. Names and addresses of relevant importing parties in The Netherlands can be found in Appendix 11. When the exporter has pre-selected a number of potential trade partners, the next step is to communicate with them by mail, e-mail, fax or phone.

When corresponding by mail, documentation on both the company and the relevant products including brochures/photographic information and, if applicable, information on quality certificates, should be sent in English and in full detail. The qualities and possibilities of the company need to be clearly communicated, such as the production capacity, processing facilities. It is not advisable to exaggerate the capacities. Most importing companies require samples or visit producers and exporters before placing orders, to get to know the business partner and to see for themselves the production and/or processing facilities and conditions.

A business trip to the EU can be the next step. This allows the exporter to establish direct and personal business contacts with the prospective partners. At the same time, it is possible to compare price, quality, and packaging in the market place. A good opportunity to do this would be to visit one of the many trade fairs that are held throughout the year.

It is best to quote prices (CIF) in US$ or euro, always remembering that the exchange rate between the US$ and the euro varies, influencing the actual prices at the moment of the transaction. Due to the fluctuating exchange rate, it is strongly advised not to guarantee product prices over an extended period of time, but to quote prices linked to date and exchange rate. Regarding the final price of the product, transactions must always be subject to a definite order confirmation. This avoids problems with fluctuating exchange rates.

Large retailers (multiples) buying high volume expect to get lower prices than the best wholesale price. However, it is recommended to make a uniform price list against which special discounts may be granted for large volume, special promotions, etc., keeping in mind the method of calculation from CIF to consumer price.

Importers will usually ask for exclusivity of a complete range of products, or of a particular brand. If such an agreement is arrived at with a EU firm, it is wise to stick to it, since failure to do so can result in a loss of confidence and reduce the importer's interest in selling your products in the market.

Customs, habits and tradition are often problems which arise in business contacts, even after both partners have carried out sound preliminary investigations. European importers are careful in their selection of a supplier. Furthermore, they are characterised by a no-nonsense approach. In some cases this may lead to a culture shock for exporters from developing countries. The following list is a summary of points which can be the key to success when dealing with firms in the EU:

- correspondence is important, since it is the presentation of your company and should be as correct, accurate and neat as possible;
- business comes first;
- consistency, punctuality, reliability and honesty are very important. Be honest and direct about delivery times, quality and production capacity. If necessary, the EU partner can offer assistance in order to improve your shortcomings either directly or through the assistance of a third party. It will increase your credibility and possibly allow for long-term export agreements;
- appointments are always made prior to any visit. Once an appointment is made it is final (in case of delay, inform the company as soon as possible).

Exporters dealing with EU importers should be willing to adapt to importers' requirements. A survey run among importers revealed the following list of problems frequently encountered when doing business with exporters from developing countries; appropriate solutions are also suggested.

bad communication with the supplier
☞ telephone and fax are indispensable; telex is hardly used any more in The Netherlands. E-mail and Internet are rapidly gaining popularity;

delayed replies
☞ answer any question as soon as possible, if not straight away, at least let the importer know you are working on the answer to his question;

late delivery
☞ make sure you can deliver on time, never exaggerate your capacity. In case of delay, inform promptly and state the reason;

product quality leaves a lot to be desired
☞ investigate product improvement possibilities, never ship poorer quality goods than those demanded and agreed upon;

high exporters' margins
☞ adopt a positive attitude towards long-term relations instead of incidental exports, even if it leads to smaller margins. Quote realistic prices;

bad packaging
☞ research packaging problems (mutually) to reduce transportation costs and improve product quality and appearance;

violating exclusive rights clause in contract
☞ never try to breach your contract by selling to other trade partners. You will find that you may lose both partners, since the market is highly organised.

More information on this subject can be found in CBI's Handbook '*CBI Export Planner - A comprehensive guide for prospective exporters in developing countries*'.

5.6 Promotion

5.6.1 Trade fairs

Trade fairs are well known in Europe as an international promotional platform, and a meeting point for traders. Participants are exporters, importers, selling and promotion organisations.

The most important objectives for the participating companies from developing countries are:

➔ establishing personal contacts with buyers;
➔ promotion of housewares;
➔ European market orientation.

The number of national and international exhibitions serving the housewares industries continues to grow and exporters should definitely consider visiting selected fairs.
The increasing interest in giftware from table and kitchenware retailers is now reflected in the character of exhibitions. There is a growing emphasis on glass and ceramic giftware products being exhibited at the expense of traditional tableware. Furthermore, consumer exhibitions are increasingly visited by trade buyers, to see what consumers are buying and to get hold of innovative products that might not be on show at the major trade fairs.
The boundaries between trade and consumer shows is becoming increasingly blurred, so visits to consumer fairs can also be very useful for the purpose of market orientation.

Trade fair	**Where?**	**When?**	**What?**
Maison & Objet	Paris, France	Twice a year, January and September 2000	Decoration, gifts, tableware, table decoration, lighting
Intergift	Madrid, Spain	Annual, January 2000	International gift fair
Cado & Deco Center	Brussels, Belgium	Twice a year, January/February and September 2000	Trade mart for table & kitchenware, flower & garden, gadgets, gifts & paper, home decoration & lighting
Formex	Sollentuna, Sweden	Twice a year, January and September 2000	Gift Fair
Europacado	Brussels, Belgium	Twice a year, February/March and September 2000	Gift and home decoration fair
Macef	Milan, Italy	Twice a year, February and September 2000	International trade fair for household articles
Formland	Hering, Denmark	Twice a year, February and August 2000	Gift fair
Spring Fair Birmingham	Birmingham, England	Annual, February 2000	Houseswares, home decoration and gift fair
Ambiente	Frankfurt, Germany	Annual, February 2000	Home decoration and housewares fair

continued

Trade fair	Where?	When?	What?
Jaarbeurs Trade Mart Spring Fair	Utrecht, The Netherlands	Twice a year, March and September 2000	Housewares fair
Top Drawer Summer	London, England	Annual, May 2000	Housewares, home decoration and gift fair
Home & Gift	Harrogate, England	Annual, July 2000	Home and gift fair
Tendence	Frankfurt, Germany	Annual, August 2000	Domus & Lumina/Gifts/Table Decoration & Kitchen
Autumn Fair Birmingham	Birmingham, England	Annual, September 2000	Gifts and home accessories
Housewares International	Birmingham, England	Annual, September 2000	Housewares fair

In the cases of the Trade Mart Utrecht and Cado & Deco Center, these are permanent fairs in the same complex. The permanent fairs of the Trade Mart Utrecht is held every first Monday of each month and the Cado & Deco Center is held every Monday.

Ambiente and Tendence, two international fairs held in Frankfurt in Germany, are the largest in Europe by number of visitors, by number of exhibitors and by net floor space (square metres). The Spring and Autumn Fairs in Birmingham, the Macef in Milan and Maison & Objet in Paris follow at a distance. For more specific information on the various fairs, please consult their Internet-sites or contact the trade fair organisers. Contact details are listed in Appendix 6.

For additional information on this subject, please refer to CBI's Handbook '*Your Show Master - a guide for selection preparation and participation in trade fairs*'.

5.6.2 Trade press

The following are the main (inter)national trade magazines which can be relevant for exporters, who want to develop a better insight into the EU markets. Please refer to Appendix 7 for the names and addresses of the publishers.

Magazine	Country	Language	Subjet
Officiel l'equipment Ménager	France	French	Household appliance market
Table et Cadeau	France	French	Tableware and gifts
Eisenwaren-Zeitung	Germany	German	Household goods and appliances
Hausrat Zeitung	Germany	German	Housewares
Die Schaulade	Germany	German	Tableware, household goods
Present	Germany	German	Giftware and trend articles
Tableware International	United Kingdom	English	Tableware, gifts and housewares
Gemengde Branche	The Netherlands	Dutch	Housewares
Trend	The Netherlands	Dutch	Housewares and small electrical appliances

5.6.3 Assistance with market entry

Before approaching organisations abroad, an exporter should first check with the local trade promotion organisations, Chambers of Commerce and foreign representatives in his/her country whether the information required is readily available. There are a great number of organisations in the EU and in other European countries which are important in the field of general representation, promotion and public relations activities for exporters from developing countries.

Trade Promotion Organisations

In most EU countries, there are organisations which promote imports from developing countries through specific export promotion programmes. The services of Import Promotion Organisation can include:

- information:
  - statistics and publications about the national market
  - regular news bulletins
  - databases of importers
  - product market opportunities
- individual assistance:
  - management training
  - product testing/exhibitions
  - product adaptation services

- establishing contacts:
  - collective trade fair missions
  - selling missions.

Branch organisations / trade organisations
In most European countries, producers, wholesalers and sometimes retailers are organised in branch organisations. These organisations can be of use to new exporters to the EU, for the gathering of information about the market and for identifying potential trade partners.

Addresses, telephone and fax numbers of Trade Promotion Organisations and other organisations which can be of assistance in entering the European Union market, can be found in Appendix 8 and Appendix 5 respectively.

5.7 Checklist

This checklist can be used to verify the subjects mentioned in the previous chapters:

CHECKLIST
● Conduct market research on the market and your product group in particular: market size; segmentation; imports; main competitors; consumption patterns and trends. ● Contact possible importers concerning information about the differences in consumption patterns in the various EU countries (see Appendix 11). ● Check if the quality and grading standards of your product are in accordance with legislation and with the specific demands of importers (see Section 5.1). ● Check packaging and labelling standards as enforced by legislation and if they are in accordance with the specific demands of importers (see Section 5.2). ● Check the tariffs and quotas and the requirements for obtaining a preferential tariff (see Section 5.4). ● Verify the conditions of contracts (Section 5.5.1). ● Verify which payment methods are used (Section 5.5.2). ● Verify the delivery terms; FOB, CFR or CIF (Section 5.5.2). ● Study the business practice (correspondence, business attitude, etc.) in the EU (Section 5.5.3). ● Investigate the distribution structure; determine which trade channel is most suitable for you; identify potentially relevant client companies (Section 3.5 & Appendix 11) ● Study ways of promoting your products; trade fairs and trade press (Section 5.6) ➔ (Most important: Try to meet the specific demands of the importer in terms of adaptation of your product and/or production.

APPENDIX 1 HS CODE CLASSIFICATION OF HOUSEWARES

HS codes		Product group
		PLASTICWARE
39 24		**Tableware, kitchenware, other household articles and toilet articles of plastics**
	10 00	*Tableware and kitchenware of plastics*
	90 19	*Household and toilet articles of regenerated cellulose*
	90 90	*Other household and toilet articles*
		WOODWARE
44 19		**Tableware and kitchenware of wood**
	00 10	*Of tropical wood*
	00 90	*Of other wood*
		CERAMICWARE
69 11		**Tableware, kitchenware, other household articles and toilet articles of porcelain or china**
	10 00	*Tableware and kitchenware of porcelain or china*
	90 00	*Other household and toilet articles of porcelain or china*
69 12 00		**Ceramic tableware, kitchenware, other household articles and toilet articles, other than porcelain or china**
	00 10	*Of common pottery*
	00 30	*Stoneware*
	00 50	*Earthenware or fine pottery*
	00 90	*Other*
		GLASSWARE
70 13		**Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes**
	10 00	*Of glass-ceramics*
	21	*Drinking glasses other than of glass ceramics*
	21 11	*Of lead crystal, gathered by hand, cut or otherwise decorated*
	21 19	*Of lead crystal, gathered by hand, other*
	21 91	*Of lead crystal, gathered mechanically, cut or otherwise decorated*
	21 99	*Of lead crystal, gathered mechanically, other*
	29	*Drinking glasses other than glass ceramics*
	29 10	*Of toughened glass*
	29 51	*Gathered by hand, cut or otherwise decorated*
	29 59	*Gathered by hand, cut or otherwise decorated*
	29 91	*Gathered mechanically, cut or otherwise decorated*

continued

HS codes	Product group
29 99	*Gathered mechanically, other*
31	*Glassware of a kind used for table (other than drinking glasses) or kitchen purposes other than of glass-ceramics*
31 10	*Of lead crystal, gathered by hand*
31 90	*Of lead crystal, gathered mechanically*
32 00	*Of glass having a linear coefficient of expansion not exceeding 5 x 10^{-6} per Kelvin within a temperature range of 0 °C to 300 °C*
39	*Glassware of a kind used for table (other than drinking glasses) or kitchen purposes*
39 10	*Of toughened glass*
39 91	*Gathered by hand*
39 99	*Gathered mechanically*
91	*Other glassware*
91 10	*Of lead crystal, gathered by hand*
91 90	*Of lead crystal, gathered mechanically*
99 00	*Other*
	METALWARE
73 23	**Table, kitchen or other household articles and parts thereof, of iron or steel**
91 00	*Of cast iron, not enamelled*
92 00	*Of cast iron, enamelled*
93	*Of stainless steel*
93 10	*Articles for table use*
93 90	*Other*
94	*Of iron (other than cast iron) or steel, enamelled*
94 10	*Articles for table use*
94 90	*Other*
99	*Other*
99 10	*Articles for table use*
99 91	*Varnished or painted*
99 99	*Other*
74 18	**Table, kitchen or other household articles and parts thereof, of copper**
19 00	*Table, kitchen or other household articles and parts thereof*
76 15	**Table, kitchen or other household articles and parts thereof, of aluminium**
19	*Table, kitchen or other household articles and parts thereof*

continued

HS codes		Product group
		CUTLERY
82 11		**Knives with cutting blades, serrated or not (including pruning knives), and blades thereof**
	10 00	*Sets of assorted articles*
	91	*Table knives having fixed blades*
	91 30	*Table knives with handle and blade of stainless steel*
	91 80	*Other*
	92 00	*Other knives having fixed blades*
	93 00	*Knives having other than fixed blades*
	94 00	*Blades*
82 15		**Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware**
	10	*Sets of assorted articles containing at least one article plated with precious metal*
	10 20	*Containing only articles plated with precious metal*
	10 30	*Of stainless steel*
	10 80	*Other*
	20	*Other sets of assorted articles*
	20 10	*Of stainless steel*
	20 90	*Other*
	91 00	*Plated with precious metal*
	99	*Other*
	99 10	*Of stainless steel*
	99 90	*Other*

APPENDIX 2 DETAILED IMPORT AND EXPORT STATISTICS

This section lists Eurostat import statistics for the main product groups covered in this survey, both for The Netherlands and the EU. The three leading supplier countries are highlighted.
It should be noted that some developing countries are among the three leading supplier countries. For the sake of clarity, all developing countries included are printed in italics.

IMPORTS

THE NETHERLANDS

Housewares

Total imports of housewares into The Netherlands by product group (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
TOTAL HOUSEWARES	**536,694**	**130,277**	**569,378**	**148,827**	**556,523**	**159,877**
METALWARE	**122,402**	**24,006**	**146,489**	**35,278**	**151,004**	**35,289**
Housewares of iron or steel	**122,402**	**24,006**	**133,564**	**33,671**	**131,791**	**32,348**
Other	37,443	12,678	43,041	18,935	46,780	16,584
Of iron (other than cast iron) or steel,enamelled	7,270	2,781	10,371	2,996	9,590	3,127
Of stainless steel	47,513	7,790	76,749	10,857	72,658	11,578
Of cast iron	2,659	757	3,403	883	2,763	1,059
Housewares of aluminium	**0**	**0**	**12,216**	**1,505**	**18,079**	**2,806**
Housewares of copper	**0**	**0**	**709**	**102**	**1,135**	**135**
PLASTICWARE	**157,522**	**32,087**	**141,711**	**31,154**	**134,306**	**36,738**
Tableware and kitchenware of plastics	75,711	17,062	86,095	16,283	79,561	18,097
Other household and toilet articles	59,487	14,799	55,153	14,597	54,066	18,531
Household and toilet articles of regenerated cellulose	285	226	464	274	679	110

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
CERAMICWARE	**95,862**	**35,071**	**103,205**	**40,910**	**108,033**	**44,204**
Housewares of other than porcelain or china	45,960	18,084	52,908	21,912	56,871	23,654
Housewares of porcelain or china	49,902	16,987	50,298	18,998	51,162	20,550
GLASSWARE	**99,783**	**30,563**	**96,001**	**31,145**	**81,137**	**32,473**
Drinking glasses of toughened glass	34,203	18,883	49,605	20,262	36,062	18,303
Glassw. of a kind used for table etc. purposes (tough. gl.)	16,035	7,975	16,904	6,521	16,961	7,660
Glassware (other than drinking glasses) of lead crystal	14,634	357	13,433	308	7,890	355
Glassware of glass having a linear coefficient etc.	5,555	1,732	6,844	1,910	6,788	1,965
Drinking glasses of lead crystal	2,073	232	4,021	722	6,451	1,275
Glassw. of a kind used for table etc. purp. (lead cryst.)	3,271	944	3,373	880	5,352	2,232
Glassware of glass ceramics	1,580	440	1,823	542	1,634	683
CUTLERY	**46,893**	**4,176**	**69,471**	**6,534**	**70,700**	**7,377**
Spoons, forks, ladles, skimmers etc.	**31,177**	**2,753**	**32,873**	**2,887**	**39,235**	**3,900**
Other	12,081	1,360	16,538	1,387	18,369	1,601
Other sets of assorted articles	8,098	1,082	12,361	1,245	13,847	1,832
Sets of assorted articles plated with precious metal	2,554	222	2,266	200	3,800	323
Plated with precious metal	1,435	89	1,708	55	3,218	144
Knives with cutting blades	**15,716**	**1,423**	**36,599**	**3,647**	**31,465**	**3,477**
Knives having other than fixed blades	0	0	11,134	1,259	10,847	1,002
Table knives having fixed blades	5,413	681	7,724	875	6,870	804
Other knives having fixed blades	0	0	9,285	571	6,107	577

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Sets of assorted articles	2,102	430	3,339	544	4,067	857
Blades	4,668	312	5,118	398	3,574	237
WOODWARE	**14,233**	**4,374**	**12,500**	**3,806**	**11,343**	**3,796**
Housewares of other wood	10,998	4,365	12,479	3,803	11,273	3,755
Housewares of tropical wood	45	9	21	3	70	41

Source: Eurostat (1998)

Total imports of tableware, kitchenware and household articles of wood, metals, glass and plastic into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**536,694**	**130,277**	**569,378**	**148,827**	**556,523**	**159,877**
Intra-EU	**307,381**	**69,346**	**318,524**	**74,994**	**285,526**	**80,101**
Developing countries	**106,726**	**31,563**	**126,710**	**36,320**	**144,962**	**46,667**
Top 3 suppliers						
Germany	99,222	19,849	99,809	22,600	98,294	26,145
China	40,411	14,563	65,830	20,767	87,334	29,743
Belgium & Luxembourg	76,662	17,068	68,556	13,842	58,896	15,034
Developing countries						
China	40,411	14,563	65,830	20,767	87,334	29,743
South Korea	31,671	4,006	28,426	3,506	20,837	3,324
Taiwan	16,717	3,686	17,490	3,779	20,061	4,219

Source: Eurostat (1998)

Metalware

Total imports of tableware, kitchenware, other household articles and toilet articles of metal into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**122,402**	**24,006**	**146,489**	**35,278**	**151,004**	**35,289**
Intra-EU	**53,441**	**9,850**	**64,675**	**12,043**	**67,303**	**16,000**
Developing countries	**38,868**	**6,983**	**48,796**	**9,377**	**47,757**	**10,788**
Top 3 suppliers						
China	12,009	2,854	25,331	5,540	28,569	6,897
Germany	18,367	3,350	19,701	4,235	18,652	4,808
Belgium & Luxembourg	13,446	1,979	15,699	2,146	17,572	3,912
Developing countries						
China	12,009	2,854	25,331	5,540	28,569	6,897
South Korea	23,043	3,369	18,276	2,752	10,908	1,818

Source: Eurostat (1998)

Imports of tableware, kitchenware, other household articles and toilet articles of metal into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of tableware, kitchen or other household articles and parts thereof, of *iron or steel*						
Total	**122,402**	**24,006**	**133,564**	**33,671**	**131,791**	**32,348**
Intra-EU	53,441	9,850	55,630	10,933	52,742	13,733
Developing countries	38,868	6,983	46,634	9,056	45,646	10,391
Imports of tableware, kitchen or other household articles and parts thereof, of *cast iron*						
Total	**3,430**	**757**	**3,403**	**883**	**2,763**	**1,059**
Intra-EU	2,083	292	2,358	380	1,590	367
Developing countries	501	216	589	322	618	508

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of tableware, kitchen or other household articles and parts thereof, of *stainless steel*						
Total	**61,292**	**7,790**	**76,749**	**10,857**	**72,658**	**11,578**
Intra-EU	21,700	1,812	24,704	2,416	20,873	2,596
Developing countries	27,870	4,344	38,773	6,620	37,121	7,188
Imports of tableware, kitchen or other household articles and parts thereof, of iron (*other than cast iron*)						
Total	**9,378**	**2,781**	**10,371**	**2,996**	**9,590**	**3,127**
Intra-EU	4,158	1,019	3,949	850	3,117	779
Developing countries	1,278	376	1,349	399	1,305	395
Total imports of other tableware, kitchen or other household articles of *iron or steel*						
Total	**48,301**	**12,678**	**43,041**	**18,935**	**46,780**	**16,584**
Intra-EU	25,499	6,727	24,620	7,287	27,162	9,991
Developing countries	9,218	2,047	5,924	1,715	6,603	2,300

Source: Eurostat (1998)

Total imports of tableware, kitchen or other household articles and parts thereof, of copper, into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**0**	**0**	**709**	**102**	**1,135**	**135**
Intra-EU	**0**	**0**	**146**	**34**	**96**	**4**
Developing countries	**0**	**0**	**374**	**53**	**879**	**114**
Top 3 suppliers						
India	0	0	301	47	653	84
China	0	0	61	5	217	30
Hong Kong	0	0	185	15	133	13

Source: Eurostat (1998)

Total imports of tableware, kitchen or other household articles and parts thereof, of aluminium into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**0**	**0**	**12,216**	**1,505**	**18,079**	**2,806**
Intra-EU	**0**	**0**	**8,899**	**1,076**	**14,465**	**2,263**
Developing countries	**0**	**0**	**1,789**	**268**	**1,232**	**283**
Top 3 suppliers						
France	0	0	796	138	7,633	1,263
Italy	0	0	2,398	370	2,842	527
Belgium & Luxembourg	0	0	3,926	361	2,623	344
Developing countries						
India	0	0	324	53	307	52
Egypt	0	0	555	97	238	42
China	0	0	340	42	208	43

Source: Eurostat (1998)

Plasticware

Total imports of tableware, kitchenware, other household articles and toilet articles of plastics into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**157,522**	**32,087**	**141,711**	**31,154**	**134,306**	**36,738**
Intra-EU	**114,421**	**22,366**	**97,845**	**20,716**	**80,071**	**22,996**
Developing countries	**13,100**	**3,715**	**13,654**	**3,605**	**18,164**	**5,568**
Top 3 suppliers						
Germany	33,672	6,555	26,354	4,841	29,336	8,838
Belgium & Luxembourg	41,468	8,931	34,721	6,477	24,757	5,408
China	8,367	2,370	9,454	2,490	13,543	4,307

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Developing countries						
China	8,367	2,370	9,454	2,490	13,543	4,307
Thailand	3,608	956	3,398	831	3,176	700
Turkey	214	55	169	49	461	136
Total imports of tableware and kitchenware of *plastics*						
Total	**97,667**	**17,062**	**86,095**	**16,283**	**79,561**	**18,097**
Intra-EU	72,641	11,146	57,596	9,394	46,557	9,974
Developing countries	10,450	2,838	10,748	2,733	12,888	3,865
Imports of tableware and kitchenware of *regenerated cellulose*						
Total	**368**	**226**	**464**	**274**	**679**	**110**
Intra-EU	282	206	306	239	93	16
Developing countries	0	0	6	1	38	13
Imports of other household and toilet articles of *regenerated cellulose*						
Total	**59,487**	**14,799**	**55,153**	**14,597**	**54,066**	**18,531**
Intra-EU	41,498	11,014	39,943	11,083	33,421	13,006
Developing countries	2,650	877	2,900	871	5,238	1,690

Source: Eurostat (1998)

Ceramicware

Total imports of tableware and kitchenware of ceramic into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**95,862**	**35,071**	**103,205**	**40,910**	**108,033**	**44,204**
Intra-EU	**55,574**	**14,364**	**61,811**	**18,229**	**57,834**	**17,181**
Developing countries	**18,095**	**10,637**	**23,416**	**13,549**	**32,017**	**19,259**

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Top 3 suppliers						
Germany	16,490	3,927	20,856	6,563	22,820	5,523
China	9,007	6,476	12,861	9,054	20,976	13,699
United Kingdom	17,963	3,968	18,765	5,022	14,349	4,087
Developing countries						
China	9,007	6,476	12,861	9,054	20,976	13,699
Philippines	1,226	313	2,159	913	3,937	1,370
Thailand	2,913	1,068	2,158	673	2,769	836
Imports of tableware and kitchenware of porcelain or china						
Total	**49,902**	**16,987**	**50,298**	**18,998**	**51,162**	**20,550**
Intra-EU	26,022	4,651	24,745	4,879	19,626	4,195
Developing countries	9,540	6,094	14,225	8,565	19,059	11,867
Imports of ceramic tableware and kitchenware of other than porcelain or china						
Total	**45,960**	**18,084**	**52,908**	**21,912**	**56,871**	**23,654**
Intra-EU	29,5521	9,713	37,066	13,350	38,207	12,986
Developing countries	8,555	4,543	9,191	4,984	12,959	7,392

Source: Eurostat (1998)

Glassware

Total imports of glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**99,783**	**30,563**	**96,001**	**31,145**	**81,137**	**32,473**
Intra-EU	**63,029**	**20,980**	**63,876**	**21,259**	**56,629**	**21,057**
Developing countries	**9,732**	**5,522**	**7,640**	**4,657**	**8,029**	**4,836**

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Top 3 suppliers						
Germany	19,273	5,155	18,013	5,900	17,637	6,098
France	21,072	8,305	18,329	7,509	16,010	7,254
Belgium & Luxembourg	12,723	4,806	9,740	3,847	7,674	3,724
Developing countries						
Turkey	3,616	2,023	2,161	1,317	3,009	1,516
China	1,961	700	1,895	552	1,680	525
Thailand	1,957	795	1,504	640	1,279	579

Source: Eurostat (1998)

Imports of glassware into The Netherlands by product group (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes of glass-ceramics						
Total	**2,038**	**440**	**1,823**	**542**	**1,634**	**683**
Intra-EU	1,892	402	1,343	333	823	321
Developing countries	9	2	263	104	593	289
Imports of drinking glasses other than of glass ceramics (lead crystal)						
Total	**2,674**	**232**	**4,021**	**722**	**6,451**	**1,275**
Intra-EU	2,478	215	2,631	265	5,561	1,030
Developing countries	94	12	256	213	160	67

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of drinking glasses other than glass ceramics (toughened glass)						
Total	**44,122**	**18,883**	**49,605**	**20,262**	**36,062**	**18,303**
Intra-EU	36,891	14,722	42,226	16,069	30,512	15,031
Developing countries	4,227	2,716	3,949	2,535	2,981	1,955
Imports of glassware of a kind used for table (other than drinking glasses), kitchen purposes other than of glass ceramics						
Total	**4,220**	**944**	**3,373**	**880**	**5,352**	**2,232**
Intra-EU	3,186	619	1,620	396	1,471	761
Developing countries	165	92	221	202	693	287
Imports of glass having a linear coefficient of expansion not exceeding 5 x 10^{-6} per Kelvin within a temperature range of 0 °C to 300 °C						
Total	**7,166**	**1,732**	**6,844**	**1,910**	**6,788**	**1,965**
Intra-EU	4,981	1,197	4,723	1,325	4,729	1,338
Developing countries	52	12	9	3	78	33
Imports of glassware of a kind used for table (other than drinking glasses) or kitchen purposes						
Total	**20,685**	**7,975**	**16,904**	**6,521**	**16,961**	**7,660**
Intra-EU	10,768	3,681	8,156	2,733	6,874	2,370
Developing countries	4,880	2,672	2,820	1,590	2,851	2,142

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of other glassware (of lead crystal)						
Total	**18,878**	**357**	**13,433**	**308**	**7,890**	**355**
Intra-EU	2,833	144	3,178	138	6,659	206
Developing countries	304	16	123	10	672	63

Source: Eurostat (1998)

Cutlery

Total imports of cutlery into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**46,893**	**4,176**	**69,471**	**6,534**	**70,700**	**7,377**
Intra-EU	**17,198**	**950**	**26,803**	**1,938**	**20,104**	**1,567**
Developing countries	**19,540**	**2,051**	**27,281**	**3,170**	**33,645**	**4,380**
Top 3 suppliers						
China	6,094	932	13,605	2,105	19,837	3,221
Germany	9,901	432	13,374	750	8,808	590
Hong Kong	5,366	829	7,663	1,002	8,743	1,035
Developing countries						
China	6,094	932	13,605	2,105	19,837	3,221
Indonesia	4,505	518	3,336	381	4,129	455
Thailand	206	16	1,045	69	449	46
Bangladesh	128	19	220	36	242	47

Source: Eurostat (1998)

Total imports of knives with cutting blades, serrated or not (including pruning knives), and blades thereof into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**15,716**	**1,423**	**36,599**	**3,647**	**31,465**	**3,477**
Intra-EU	**7,464**	**410**	**17,513**	**1,411**	**11,894**	**962**
Developing countries	**5,196**	**625**	**9,756**	**1,457**	**10,688**	**1,846**
Top 3 suppliers						
China	1,334	278	5,441	1,109	6,310	1,463
United Kingdom	2,383	186	4,926	524	4,621	475
Germany	4,256	145	8,798	449	4,562	310
Developing countries						
China	1,334	278	5,441	1,109	6,310	1,463
South Korea	2,442	177	2,859	180	2,876	189
Indonesia	1,232	158	894	111	1,219	151
Imports of sets of assorted articles						
Total	**2,712**	**430**	**3,339**	**544**	**4,067**	**857**
Intra-EU	793	52	778	106	861	50
Developing countries	808	162	1,279	254	2,527	726
Imports of table knives having fixed blades						
Total	**6,983**	**681**	**7,724**	**875**	**6,870**	**804**
Intra-EU	1,204	80	1,565	245	1,290	235
Developing countries	4,374	462	5,109	545	4,656	481
Imports of other knives having fixed blades						
Total	**0**	**0**	**9,285**	**571**	**6,107**	**577**
Intra-EU	0	0	6,169	209	2,787	168
Developing countries	0	0	1,458	267	1,784	289
Imports of knives having other than fixed blades						
Total	**0**	**0**	**11,134**	**1,259**	**10,847**	**1,002**
Intra-EU	0	0	4,375	490	3,938	309
Developing countries	0	0	1,865	383	1,468	331

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of blades						
Total	**6,022**	**312**	**5,118**	**398**	**3,574**	**237**
Intra-EU	5,467	278	4,626	361	3,018	200
Developing countries	14	1	46	8	253	19

Source: Eurostat (1998)

Total imports of spoon, forks ladles, skimmers, cake-servers, fish knives, butterknives, sugar tongs and similar kitchen or tableware into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**31,177**	**2,753**	**32,873**	**2,887**	**39,235**	**3,900**
Intra-EU	**9,734**	**540**	**9,291**	**527**	**8,209**	**605**
Developing countries	**14,344**	**1,426**	**17,525**	**1,713**	**22,957**	**2,534**
Top 3 suppliers						
China	4,760	654	8,164	996	13,527	1,758
South Korea	5,866	362	5,835	352	5,853	380
Hong Kong	4,341	604	4,189	495	5,634	607
Developing countries						
China	4,760	654	8,164	996	13,527	1,758
South Korea	5,866	362	5,835	352	5,853	380
Indonesia	3,273	360	2,443	270	2,910	304
Imports of sets of assorted articles containing at least one article plated with precious metal						
Total	**3,295**	**222**	**2,266**	**200**	**3,800**	**323**
Intra-EU	971	48	761	42	933	49
Developing countries	1,611	119	1,278	135	1,964	241
Imports of other sets of assorted articles						
Total	**10,446**	**1,082**	**12,361**	**1,245**	**13,847**	**1,832**
Intra-EU	3,678	200	3,613	189	3,119	324
Developing countries	3,853	533	6,453	763	8,655	1,233

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of cutlery other than spoons, forks etc. plated with precious metal						
Total	**1,851**	**89**	**1,708**	**55**	**3,218**	**144**
Intra-EU	1,378	38	1,071	14	964	7
Developing countries	154	14	459	22	540	43
Imports of cutlery other than spoons, forks etc. plated with stainless steel and other						
Total	**15,584**	**1,360**	**16,538**	**1,387**	**18,369**	**1,601**
Intra-EU	3,707	254	3,847	282	3,193	225
Developing countries	8,726	760	9,336	793	11,798	1,017

Source: Eurostat (1998)

Woodware

Total imports of tableware and kitchenware of wood into The Netherlands (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**14,233**	**4,374**	**12,500**	**3,806**	**11,343**	**3,796**
Intra-EU	**3,718**	**836**	**3,512**	**809**	**3,587**	**1,300**
Developing countries	**7,392**	**2,655**	**5,923**	**1,962**	**5,351**	**1,836**
Top 3 suppliers						
China	2,973	1,231	2,684	1,026	2,729	1,094
Thailand	2,989	997	2,231	605	2,204	635
Belgium & Luxembourg	1,222	246	968	300	1,767	875
Developing countries						
China	2,973	1,231	2,684	1,026	2,729	1,094
Thailand	2,989	997	2,231	605	2,204	635

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of tableware and kitchenware of tropical wood						
Total	**45**	**9**	**21**	**3**	**70**	**41**
Intra-EU	24	6	5	1	25	22
Developing countries	1	0	0	0	41	18
Imports of tableware and kitchenware of other wood						
Total	**14,187**	**4,365**	**12,479**	**3,803**	**11,273**	**3,755**
Extra-EU	10,494	3,535	8,971	2,995	7,711	2,477
Developing countries	7,390	2,655	5,923	1,962	5,310	1,818

Source: Eurostat (1998)

Netherlands imports of housewares from developing countries (share in the imported value of each product group; share of each product group in the total imported value originating in developing countries), 1997

	Total (US$ thousand)	Developing countries (US$ thousand)	% per product group	% of total DC's supply
Total housewares	**556,523**	**144,962**	**26**	**100**
METALWARE	***151,004***	***47,757***	***32***	***33***
Housewares of copper	**1,135**	**879**	**77**	**1**
Housewares of iron or steel	**131,791**	**45,646**	**35**	**31**
Of stainless steel	72,658	37,121	51	26
Of cast iron	2,763	618	22	0
Other	46,780	6,603	14	5
Of iron (other than cast iron) or steel, enamelled	9,590	1,305	14	1
Housewares of aluminium	**18,079**	**1,232**	**7**	**1**

continued

continued	**Total (US$ thousand)**	**Developing countries (US$ thousand)**	**% per product group**	**% of total DC's supply**
CUTLERY	***70,700***	***33,645***	***48***	***23***
Spoons, forks, ladles, skimmers etc.	**39,235**	**22,957**	**59**	**16**
Sets of assorted articles plated with precious metal	3,800	1,964	52	1
Other sets of assorted articles	13,847	8,655	63	6
Plated with precious metal	3,218	540	17	0
Other	18,369	11,798	64	8
Knives with cutting blades	***31,465***	***10,688***	***34***	***7***
Sets of assorted articles	4,067	2,527	62	2
Table knives having fixed blades	6,870	4,656	68	3
Other knives having fixed blades	6,107	1,784	29	1
Knives having other than fixed blades	10,847	1,468	14	1
Blades	3,574	253	7	0
CERAMICWARE	***108,033***	***32,018***	***30***	***22***
Housewares of porcelain or china	**51,162**	**19,059**	**37**	**13**
Housewares of other than porcelain or china	**56,871**	**12,959**	**23**	**9**
PLASTICWARE	***134,306***	***18,164***	***14***	***13***
Other household and toilet articles	54,066	5,238	10	4
Household and toilet articles of regenerated cellulose	679	38	6	0
Tableware and kitchenware of plastics	79,561	12,888	16	9
WOODWARE	***11,343***	***5,351***	***47***	***4***
Housewares of other wood	11,273	5,310	47	4
Housewares of tropical wood	70	41	58	0

continued

continued	Total (US$ thousand)	Developing countries (US$ thousand)	% per product group	% of total DC's supply
GLASSWARE	***81,137***	***8,029***	***10***	***6***
Other glassware	7,890	672	9	0
Glassware (other than drinking glasses)	16,961	2,851	17	2
Of glass having a linear coefficient	6,788	78	1	0
Glassware (other than drinking glasses) other than of glass-ceramics	5,352	693	13	0
Drinking glasses other than glass ceramics	36,062	2,981	8	2
Drinking glasses other than of glass ceramics	6,451	160	2	0
Of glass-ceramics	1,634	593	36	0

Source: Eurostat (1998)
Note: because individual figures are rounded off the totals indicated may not totally exactly

EXPORTS

THE NETHERLANDS

Exports of tableware, kitchenware, household articles and toilet articles of plastic, wood, glass and metal (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total housewares	**391,069**	**81,841**	**432,524**	**89,023**	**387,919**	**133,864**
PLASTIC	**188,225**	**38,344**	**183,263**	**40,056**	**138,378**	**76,464**
Tableware and kitchenware of plastics	109,564	20,531	112,719	22,901	70,381	56,991
Other household and toilet articles	60,659	17,751	70,026	17,066	67,837	19,430
Household and toilet articles of regenerated cellulose	319	62	518	89	159	43

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
METALWARE	**62,406**	**11,891**	**75,246**	**12,694**	**81,998**	**16,117**
Housewares of iron or steel	**62,406**	**11,891**	**63,378**	**11,817**	**75,695**	**15,613**
Of iron (other than cast iron) or steel, enamelled	17,032	2,603	26,984	3,283	35,596	5,435
Other household articles of iron or steel	27,895	8,436	31,959	7,689	33,743	8,601
Of stainless steel	3,023	731	3,831	694	5,173	1,178
Of cast iron	427	121	604	151	1,183	399
Housewares of aluminium	**0**	**0**	**11,039**	**852**	**5,945**	**468**
Housewares of copper	**0**	**0**	**830**	**25**	**358**	**36**
GLASSWARE	**63,198**	**10,196**	**70,608**	**10,796**	**63,696**	**11,699**
Drinking glasses of toughened glass	33,321	7,881	51,090	8,337	45,180	8,544
Other glassware	7,408	73	7,580	51	7,194	102
Glassware of a kind used for table purp. of tough. glass	3,273	1,084	5,380	1,279	3,184	1,224
Drinking glasses other than of lead crystal	700	36	839	91	2,824	606
Of glass having a linear coefficient	2,412	580	2,776	481	2,467	475
Glassware of glass ceramics	971	185	1,520	240	1,688	284
Glassware of a kind used for table purposes of lead crystal	906	357	1,423	317	1,159	464
CERAMIC	**44,740**	**18,298**	**47,903**	**20,171**	**51,895**	**24,208**
Housewares of porcelain or china	27,121	9,748	30,888	11,967	32,889	13,743
Housewares of other than porcelain or china	17,619	8,550	17,015	8,204	19,007	10,465

continued

continued	1995 value	1995 volume	1996 value	1996 volume	1997 value	1997 volume
CUTLERY	**25,975**	**1,733**	**50,026**	**3,970**	**47,216**	**4,120**
Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butterknives, sugar tongs and similar kitchen or tableware	**15,053**	**1,058**	**23,976**	**2,318**	**30,451**	**2,324**
Other sets of assorted articles	5,752	533	14,203	1,143	20,925	1,467
Other	4,718	393	8,850	1,078	7,633	746
Sets of assorted articles containing at least one article plated with precious metal	652	106	499	67	1,487	92
Plated with precious metal	547	26	425	30	406	19
Knives with cutting blades, serrated or not (including pruning knives),and blades thereof	**10,922**	**675**	**26,050**	**1,652**	**16,765**	**1,796**
Knives having other than fixed blades	0	0	7,934	706	5,657	560
Table knives having fixed blades	2,501	242	4,603	369	3,553	397
Sets of assorted articles	1,321	226	1,918	139	2,991	490
Other knives having fixed blades	0	0	6,320	194	2,481	185
Blades	4,645	207	5,276	244	2,083	164
WOODWARE	**6,524**	**1,379**	**5,479**	**1,336**	**4,736**	**1,256**
Housewares of other wood	5,027	1,368	5,449	1,329	4,606	1,085
Housewares of tropical wood	30	11	30	7	130	171

Source: Eurostat (1998)

Housewares

Imports of housewares into the EU by product group (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total housewares	**6,800,203**	**1,585,218**	**7,514,930**	**1,676,239**	**7,462,492**	**2,438,996**
METALWARE	**1,377,803**	**240,740**	**1,799,680**	**314,924**	**1,826,538**	**350,816**
Housewares of iron or steel	**1,377,803**	**240,740**	**1,446,669**	**262,355**	**1,452,581**	**291,313**
Of stainless steel	803,229	94,665	862,425	107,999	866,530	126,053
Other household articles of iron or steel	394,737	97,805	400,881	103,411	400,370	109,145
Of iron (other than cast iron) or steel	132,842	36,092	130,951	35,041	132,926	39,003
Of cast iron	46,995	12,178	52,411	15,904	52,754	17,112
Housewares of aluminium	**0**	**0**	**321,858**	**49,202**	**341,713**	**56,457**
Housewares of copper	**0**	**0**	**31,154**	**3,367**	**32,243**	**3,046**
PLASTICSWARE	**1,740,712**	**374,222**	**1,750,405**	**346,956**	**1,715,865**	**771,184**
Tableware and kitchenware of plastics	1,179,601	232,908	1,196,366	212,612	1,172,741	626,743
Other household and toilet art. of regenerated cellulose	549,158	139,172	538,593	130,243	528,228	141,625
Household and toilet articles of regenerated cellulose	11,953	2,142	15,446	4,101	14,897	2,816
GLASSWARE	**1,484,584**	**465,125**	**1,504,413**	**474,507**	**1,482,098**	**557,254**
Drinking glasses of toughened glass	623,208	252,246	613,965	261,556	586,106	329,055
Glassw. of a kind used for table etc. purp. (tough. gl.)	358,607	129,698	378,120	134,611	348,050	144,696
Other glassware of lead crystal	144,183	6,651	174,556	8,097	212,568	7,592
Glassware of glass having a linear coefficient etc.	87,112	32,047	75,176	27,925	73,513	29,855

continued

continued	1995 value	1995 volume	1996 value	1996 volume	1997 value	1997 volume
Glassw. of a kind used for table etc. purposes (lead cr.)	73,649	13,062	68,323	9,815	70,756	11,838
Drinking glasses of lead crystal	130,250	21,480	136,564	21,872	141,255	24,354
Glassware of glass ceramics	67,574	9,941	57,709	10,631	49,850	9,864
CERAMIC	**1,424,703**	**407,263**	**1,455,195**	**424,640**	**1,438,204**	**545,392**
Household articles of porcelain or china	812,482	182,179	819,001	191,687	791,211	278,353
Household articles of other than porcelain or china	612,221	225,084	636,194	232,953	646,993	267,039
CUTLERY	**618,870**	**56,124**	**836,285**	**70,486**	**835,754**	**160,517**
Spoons, forks, ladles, skimmers etc.	**450,401**	**40,542**	**468,456**	**42,770**	**493,367**	**48,514**
Sets of assorted articles plated with precious metal	41,935	3,096	45,145	3,651	49,009	4,688
Other sets of assorted articles	184,051	18,849	190,590	20,372	213,464	24,080
Plated with precious metal	18,920	912	14,559	687	14,386	595
Other	205,494	17,685	218,163	18,060	216,508	19,151
Knives with cutting blades	**168,469**	**15,582**	**367,829**	**27,716**	**342,387**	**112,003**
Sets of assorted articles	31,838	4,235	35,904	4,917	35,529	6,173
Table knives having fixed blades	97,683	8,503	101,329	8,610	92,814	90,897
Other knives having fixed blades	0	0	89,835	5,093	81,520	5,465
Knives having other than fixed blades	0	0	106,741	6,533	101,689	6,261
Blades	38,948	2,844	34,020	2,563	30,834	3,207
WOODWARE	**153,532**	**41,744**	**168,953**	**44,726**	**164,033**	**53,833**
Housewares of other wood	147,366	39,767	162,775	42,684	159,127	52,458
Housewares of tropical wood	6,166	1,977	6,178	2,042	4,906	1,375

Source: Eurostat (1998)

Total imports of tableware, kitchenware and household articles of wood, metals, glass and plastic into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**6,800,203**	**1,585,218**	**7,514,930**	**1,676,239**	**7,462,492**	**2,438,996**
Intra-EU	**4198507.5**	**926209**	**4581548.8**	**964287**	**4337001**	**1625305**
Developing countries	**1,383,768**	**390,450**	**1,532,704**	**414,260**	**1,669,697**	**492,729**
Top 3 suppliers						
China	662,659	183,776	783,080	206,000	941,837	252,500
Italy	714,445	196,394	897,880	221,852	848,194	251,312
France	829,737	215,086	916,178	220,132	830,979	273,069
Developing countries						
China	662,659	183,776	783,080	206,000	941,837	252,500
South Korea	211,339	25,064	194,050	21,871	155,304	19,046
Thailand	131,763	38,995	129,106	34,188	138,424	45,502
Turkey	98,842	42,070	100,215	42,623	116,053	64,565
Indonesia	78,524	28,753	79,821	26,678	77,579	25,783
India	23,561	5,371	39,243	7,241	46,106	8,868
Brazil	35,097	15,104	35,039	13,332	32,959	13,652

Source: Eurostat (1998)

Metalware

Total imports of tableware, kitchen or other household articles and parts thereof, of metal, into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**1,377,803**	**240,740**	**1,799,680**	**314,924**	**1,826,538**	**350,816**
Intra-EU	**653,447**	**103,833**	**955,021**	**151,823**	**937,027**	**167,189**
Developing countries	**462,536**	**89,373**	**518,024**	**101,624**	**568,723**	**122,804**
Top 3 suppliers						
China	274,604	59,413	317,330	68,907	386,314	90,627
Italy	200,089	42,997	348,708	63,795	332,959	71,392
Germany	160,920	17,411	172,465	20,573	163,755	21,919

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Developing countries						
China	274,604	59,413	317,330	68,907	386,314	90,627
South Korea	121,100	16,042	104,956	13,796	72,979	10,015
India	12,877	2,582	27,890	4,518	33,885	5,865
Turkey	23,269	4,969	23,909	5,493	27,441	7,607
Thailand	6,769	835	7,034	888	10,133	1,125
Indonesia	7,380	1,663	11,915	2,872	10,005	2,491

Source: Eurostat (1998)

Imports of tableware, kitchen or other household articles and parts thereof, of iron or steel, into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,377,803**	**240,740**	**1,446,669**	**262,355**	**1,452,581**	**291,313**
Intra-EU	**653,447**	**103,833**	**693,220**	**111,978**	**659,350**	**121,443**
Developing countries	**462,536**	**89,373**	**475,246**	**94,861**	**523,578**	**115,944**
Top 3 suppliers						
China	274,604	59,413	301,196	66,324	370,570	88,256
Italy	200,089	42,997	224,943	43,761	197,004	46,893
Germany	160,920	17,411	152,638	17,741	144,985	19,504
Developing countries						
China	274,604	59,413	301,196	66,324	370,570	88,256
South Korea	121,100	16,042	103,891	13,666	72,026	9,872
Imports of tableware, kitchen or other household articles and parts thereof, of cast iron						
Total	**46,995**	**12,178**	**52,411**	**15,904**	**52,754**	**17,112**
Intra-EU	30,852	5,093	31,466	6,293	29,827	5,620
Developing countries	9,420	5,202	13,143	6,771	16,236	9,244

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of tableware, kitchen or other household articles and parts thereof, of stainless steel						
Total	**803,229**	**94,665**	**862,425**	**107,999**	**866,530**	**126,053**
Intra-EU	333,126	30,717	362,441	35,838	343,824	40,957
Developing countries	327,620	51,192	346,518	57,882	382,937	71,066
Imports of tableware, kitchen or other household articles and parts thereof, of iron (other than cast iron) or steel						
Total	**132,842**	**36,092**	**130,951**	**35,041**	**132,926**	**39,003**
Intra-EU	49,430	8,759	52,760	10,170	48,976	9,951
Developing countries	40,318	12,985	35,095	10,863	40,038	13,004
Imports of other table, kitchen or other household articles and parts thereof of other than iron or stainless steel						
Total	**394,737**	**97,805**	**400,881**	**103,411**	**400,370**	**109,145**
Intra-EU	240,039	59,264	246,552	59,677	236,722	64,915
Developing countries	85,179	19,994	80,491	19,345	84,367	22,630

Source: Eurostat (1998)

Total imports of tableware, kitchen or other household articles and parts thereof, of copper, into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		**1996**		**1997**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**0**	**0**	**31,154**	**3,367**	**32,243**	**3,046**
Intra-EU	**0**	**0**	**9,690**	**714**	**8,621**	**614**
Developing countries	**0**	**0**	**18,568**	**2,303**	**20,351**	**2,154**
Top 3 suppliers						
India	0	0	10,295	1,363	10,138	1,385
China	0	0	5,299	656	5,514	545
Brazil	0	0	1,166	21	3,179	39

Source: Eurostat (1998)

Total imports of tableware, kitchen or other household articles and parts thereof, of aluminium, into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		**1996**		**1997**	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**0**	**0**	**321,858**	**49,202**	**341,713**	**56,457**
Intra-EU	**0**	**0**	**252,111**	**39,131**	**269,055**	**45,132**
Developing countries	**0**	**0**	**24,210**	**4,460**	**24,794**	**4,706**
Top 3 suppliers						
Italy	0	0	122,239	19,900	134,261	24,299
France	0	0	48,955	6,390	59,613	8,111
Belgium & Luxembourg	0	0	22,521	3,167	19,226	3,569
Developing countries						
China	0	0	10,835	1,927	10,230	1,826
India	0	0	2,774	421	4,494	679

Source: Eurostat (1998)

Plasticware

Total imports of tableware, kitchenware, other household articles and toilet articles of plastic, into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**1,740,712**	**374,222**	**1,750,405**	**346,956**	**1,715,865**	**771,184**
Intra-EU	**1,294,207**	**269,315**	**1,280,168**	**236,764**	**1,184,582**	**636,186**
Developing countries	**176,382**	**45,228**	**194,048**	**46,583**	**226,441**	**59,781**
Top 3 suppliers						
Belgium & Luxembourg	247,941	33,594	247,731	31,438	254,217	35,132
France	244,049	45,305	269,171	33,753	201,105	29,112
Italy	188,061	49,449	184,406	52,843	171,068	50,765
Developing countries						
China	124,282	31,682	140,744	32,584	164,604	41,507
Thailand	31,110	7,905	32,024	8,113	36,591	10,319
Imports of tableware and kitchenware of plastic						
Total	**1,179,601**	**232,908**	**1,196,366**	**212,612**	**1,172,741**	**626,743**
Intra-EU	900,387	166,841	899,332	144,141	839,905	542,758
Developing countries	124,637	32,794	136,819	32,818	158,980	41,278
Imports of household articles of regenerated cellulose						
Total	**11,953**	**2,142**	**15,446**	**4,101**	**14,897**	**2,816**
Intra-EU	9,516	1,578	11,137	3,012	10,754	1,690
Developing countries	752	161	979	243	989	225
Imports of household articles other than of regenerated cellulose						
Total	**549,158**	**139,172**	**538,593**	**130,243**	**528,228**	**141,625**
Intra-EU	384,304	100,896	369,698	89,611	333,923	91,738
Developing countries	50,992	12,273	56,250	13,522	66,472	18,278

Source: Eurostat (1998)

Glassware

Total imports of glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**1,484,584**	**465,125**	**1,504,413**	**474,507**	**1,482,098**	**557,254**
Intra-EU	**1,043,246**	**332,228**	**1,065,998**	**347,228**	**1,002,806**	**403,581**
Developing countries	**138,888**	**74,830**	**133,098**	**70,429**	**138,520**	**92,778**
Top 3 suppliers						
France	410,168	149,027	410,440	156,553	379,881	184,585
Germany	192,794	32,267	171,458	31,613	154,229	33,381
Italy	128,787	54,869	143,121	56,323	138,201	77,458
Developing countries						
Turkey	64,855	33,930	61,209	32,191	69,357	49,722
Slovenia	20,436	10,832	20,059	10,418	18,253	12,780
China	12,784	3,534	13,088	3,905	12,082	3,492

Source: Eurostat (1998)

Imports of glassware by product group into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes, of glass ceramics						
Total	**67,574**	**9,941**	**57,709**	**10,631**	**49,850**	**9,864**
Intra-EU	60,577	7,850	49,295	7,116	42,724	7,436
Developing countries	1,514	648	4,725	2,517	2,088	1,073

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of drinking glasses other than of glass ceramics (lead crystal)						
Total	**130,250**	**21,480**	**136,564**	**21,872**	**141,255**	**24,354**
Intra-EU	107,283	17,685	108,380	16,383	116,000	18,266
Developing countries	5,742	1,262	6,361	1,564	7,107	2,750
Imports of drinking glasses other than glass ceramics (toughened glass)						
Total	**623,208**	**252,246**	**613,965**	**261,556**	**586,106**	**329,055**
Intra-EU	453,703	182,775	459,015	194,307	423,558	242,555
Developing countries	73,155	43,819	68,603	41,454	77,750	60,562
Imports of glassware of a kind used for table (other than drinking glasses) or kitchen purposes, other than of glass ceramics						
Total	**73,649**	**13,062**	**68,323**	**9,815**	**70,756**	**11,838**
Intra-EU	51,387	8,424	46,981	6,037	44,936	5,978
Developing countries	3,729	1,350	2,499	657	3,711	1,132
Imports of glass having a linear coefficient of expansion not exceeding 5×10^{-6} per Kelvin within a temperature range of 0 °C to 300 °C						
Total	**87,112**	**32,047**	**75,176**	**27,925**	**73,513**	**29,855**
Intra-EU	63,476	22,298	56,521	20,812	55,972	22,971
Developing countries	2,590	1,227	2,534	919	2,259	1,301

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of glassware of a kind used for table (other than drinking glasses) or kitchen purposes						
Total	**358,607**	**129,698**	**378,120**	**134,611**	**348,050**	**144,696**
Intra-EU	245,148	88,822	268,561	96,966	236,899	101,576
Developing countries	50,104	26,374	46,794	23,051	42,694	25,160
Imports of other glassware (of lead crystal)						
Total	**144,183**	**6,651**	**174,556**	**8,097**	**212,568**	**7,592**
Intra-EU	61,672	4,374	77,244	5,607	82,717	4,799
Developing countries	2,054	150	1,583	267	2,912	800

Source: Eurostat (1998)

Ceramicware

Total imports of tableware, kitchenware, other household articles and toilet articles of ceramic into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**1,424,703**	**407,263**	**1,455,195**	**424,640**	**1,438,204**	**545,392**
Intra-EU	**903,277**	**192,196**	**881,041**	**193,056**	**846,265**	**297,807**
Developing countries	**251,457**	**124,592**	**274,169**	**132,420**	**290,167**	**141,650**
Top 3 suppliers						
Germany	246,189	32,748	226,595	33,458	205,173	31,604
United Kingdom	153,275	27,881	151,164	28,838	140,730	99,473
Italy	136,884	42,805	141,166	41,981	131,209	43,959
Developing countries						
China	83,413	59,486	95,450	64,325	113,515	72,090
Thailand	48,705	17,489	41,116	13,231	43,956	16,894
Indonesia	20,403	8,425	20,283	7,267	24,120	7,157

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of housewares of porcelain or china						
Total	**812,482**	**182,179**	**819,001**	**191,687**	**791,211**	**278,353**
Intra-EU	503,290	69,741	468,009	67,962	436,990	146,027
Developing countries	117,669	54,681	136,199	59,916	146,846	65,532
Imports of housewares of other than porcelain and china						
Total	**612,221**	**225,084**	**636,194**	**232,953**	**646,993**	**267,039**
Intra-EU	399,988	122,455	413,033	125,094	409,275	151,780
Developing countries	133,788	69,911	137,970	72,504	143,321	76,118

Source: Eurostat (1998)

Cutlery

Total imports of cutlery into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Total	**618,870**	**56,124**	**836,285**	**70,486**	**835,754**	**160,517**
Intra-EU	**250,225**	**17,747**	**333,811**	**21,686**	**313,393**	**105,276**
Developing countries	**282,790**	**32,587**	**339,178**	**39,909**	**367,203**	**45,946**
Top 3 suppliers						
China	143,999	20,810	191,950	27,352	238,074	34,748
Germany	64,644	3,311	87,239	4,589	82,853	5,093
Italy	54,834	4,689	71,763	5,110	67,538	5,467
Developing countries						
South Korea	77,123	5,220	75,760	4,759	67,244	4,261
Indonesia	36,208	4,084	35,921	4,017	30,919	3,502
Thailand	8,406	811	11,715	1,146	9,656	986
Brazil	9,360	655	10,355	725	8,649	548
Pakistan	437	45	4,473	485	4,043	406

Source: Eurostat (1998)

Total imports of spoon, forks ladles, skimmers, cake-servers, fish knives, butterknives, sugar tongs and similar kitchen or tableware into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**450,401**	**40,542**	**468,456**	**42,770**	**493,367**	**48,514**
Intra-EU	**175,631**	**12,546**	**185,621**	**13,158**	**185,614**	**14,338**
Developing countries	**220,875**	**23,927**	**229,816**	**24,894**	**257,103**	**29,348**
Top 3 suppliers						
China	117,053	15,304	131,306	16,772	169,308	21,868
Italy	47,898	4,135	53,764	4,123	53,118	4,459
South Korea	55,382	3,553	51,198	3,159	46,684	2,867
Developing countries						
China	117,053	15,304	131,306	16,772	169,308	21,868
South Korea	55,382	3,553	51,198	3,159	46,684	2,867
Indonesia	31,155	3,418	27,274	2,977	23,557	2,641
Imports of other spoons, forks etc. plated with precious metal						
Total	**18,920**	**912**	**14,559**	**687**	**14,386**	**595**
Intra-EU	11,779	271	9,973	307	9,228	221
Developing countries	4,592	518	3,188	321	2,279	236
Imports of other spoons, forks etc. plated with other than precious metal (stainless metal and other)						
Total	**205,494**	**17,685**	**218,163**	**18,060**	**216,508**	**19,151**
Intra-EU	64,876	5,003	69,379	4,341	65,625	4,649
Developing countries	107,310	10,448	118,748	11,230	122,066	11,839

continued

continued	1995		1996		1997	
	value	volume	value	volume	value	volume
Imports of sets of assorted articles containing at least one article plated with precious metal						
Total	**41,935**	**3,096**	**45,145**	**3,651**	**49,009**	**4,688**
Intra-EU	24,577	1,606	26,678	1,772	21,475	1,470
Developing countries	13,919	1,319	16,063	1,754	24,431	3,035
Imports of other sets of assorted articles						
Total	**184,051**	**18,849**	**190,590**	**20,372**	**213,464**	**24,080**
Intra-EU	74,398	5,666	79,593	6,738	89,287	7,998
Developing countries	95,054	11,642	91,819	11,589	108,327	14,238

Source: Eurostat (1998)

Total imports of knives with cutting blades, serrated or not (including pruning knives), and blades thereof into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**168,469**	**15,582**	**367,829**	**27,716**	**342,387**	**112,003**
Intra-EU	**74,594**	**5,201**	**148,190**	**8,528**	**127,779**	**90,938**
Developing countries	**61,915**	**8,660**	**109,361**	**15,015**	**110,099**	**16,598**
Top 3 suppliers						
China	26,946	5,506	60,644	10,580	68,766	12,880
Switzerland	3,068	49	52,705	762	50,657	779
Germany	20,245	1,037	43,973	2,190	38,600	2,372
Developing countries						
China	26,946	5,506	60,644	10,580	68,766	12,880
Indonesia	5,053	666	8,648	1,040	7,362	861
Brazil	4,676	420	5,583	511	4,459	352
Pakistan	369	41	4,380	476	3,931	391
Thailand	1,983	197	2,936	260	2,199	214

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Imports of sets of assorted articles						
Total	**31,838**	**4,235**	**35,904**	**4,917**	**35,529**	**6,173**
Intra-EU	13,257	886	12,986	1,009	11,596	1,186
Developing countries	12,976	2,738	16,435	3,147	19,335	4,451
Imports of table knives having fixed blades						
Total	**97,683**	**8,503**	**101,329**	**8,610**	**92,814**	**90,897**
Intra-EU	31,475	2,166	30,030	2,084	27,511	84,247
Developing countries	47,440	5,631	52,055	5,822	50,564	6,026
Imports of other knives having fixed blades						
Total	**0**	**0**	**89,835**	**5,093**	**81,520**	**5,465**
Intra-EU	0	0	47,274	1,687	37,142	1,754
Developing countries	0	0	18,326	2,588	19,747	2,840
Imports of knives having other than fixed blades						
Total	**0**	**0**	**106,741**	**6,533**	**101,689**	**6,261**
Intra-EU	0	0	31,599	1,873	29,959	1,721
Developing countries	0	0	20,899	3,180	18,686	2,966
Imports of blades						
Total	**38,948**	**2,844**	**34,020**	**2,563**	**30,834**	**3,207**
Intra-EU	29,862	2,149	26,301	1,875	21,572	2,030
Developing countries	1,499	291	1,646	278	1,767	315

Source: Eurostat (1998)

Woodware

Total imports of tableware and kitchenware of wood into the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997	
	value	volume	value	volume	value	volume
Total	**153,532**	**41,744**	**168,953**	**44,726**	**164,033**	**53,833**
Intra-EU	**54,105**	**10,890**	**65,510**	**13,730**	**52,928**	**15,266**
Developing countries	**71,715**	**23,840**	**74,189**	**23,295**	**78,643**	**29,770**
Top 3 suppliers						
Thailand	29,902	9,683	30,719	8,839	32,109	14,046
China	23,577	8,851	24,519	8,927	27,248	10,036
Taiwan	8,697	1,638	8,688	1,518	9,411	1,715
Developing countries						
Thailand	29,902	9,683	30,719	8,839	32,109	14,046
China	23,577	8,851	24,519	8,927	27,248	10,036
Malaysia	3,621	1,666	2,854	1,262	3,184	1,612
Vietnam	1,539	786	3,266	1,656	2,219	1,009
India	1,385	279	1,273	222	1,799	259
Indonesia	1,160	252	941	240	1,340	389
Imports of tableware and kitchenware of tropical wood						
Total	**6,166**	**1,977**	**6,178**	**2,042**	**4,906**	**1,375**
Intra-EU	2,047	424	2,195	454	2,554	503
Developing countries	3,068	1,312	3,400	1,480	1,564	667
Imports of tableware and kitchenware of other than tropical wood						
Total	**147,366**	**39,767**	**162,775**	**42,684**	**159,127**	**52,458**
Intra-EU	52,058	10,466	63,315	13,276	50,374	14,763
Developing countries	68,647	22,528	70,789	21,815	77,080	29,103

Source: Eurostat (1998)

EU imports of housewares from developing countries (share in the imported value; shares of each product group in the total imported value originating in developing countries), 1997

	Total (US$ thousand)	Developing countries (US$ thousand)	% per product group	% of total DC's supply
TOTAL HOUSEWARES	**7,462,492**	**1,669,697**	**22**	**100**
METALWARE	**1,826,538**	**568,723**	**31**	**34**
Housewares of copper	**32,243**	**20,351**	**63**	**1**
Housewares of aluminium	**341,713**	**24,794**	**7**	**1**
Housewares of iron or steel	**1,452,581**	**523,578**	**36**	**31**
Other household articles of iron or steel	400,370	84,367	21	5
Of iron (other than cast iron) or steel, enamelled	132,926	40,038	30	2
Of stainless steel	866,530	382,937	44	23
Of cast iron	52,754	16,236	31	1
CUTLERY	**835,754**	**367,203**	**44**	**22**
Spoons, forks, ladles, skimmers etc.	**493,367**	**257,103**	**52**	**15**
Sets of assorted articles plated with precious metal	49,009	24,431	50	1
Other sets of assorted articles	213,464	108,327	51	6
Plated with precious metal	14,386	2,279	16	0
Other	216,508	122,066	56	7
Knives with cutting blades	**342,387**	**110,099**	**32**	**7**
Sets of assorted articles	35,529	19,335	54	1
Table knives having fixed blades	92,814	50,564	54	3
Other knives having fixed blades	81,520	19,747	24	1
Knives having other than fixed blades	101,689	18,686	18	1
Blades	30,834	1,767	6	0.1
WOODWARE	**164,033**	**78,643**	**48**	**5**
Housewares of other wood	159,127	77,080	48	5
Houseware of tropical wood	4,906	1,564	32	0

continued

continued	**Total (US$ thousand)**	**Developing countries (US$ thousand)**	**% per product group**	**% of total DC's supply**
CERAMICWARE	**1,438,204**	**290,167**	**20**	**17**
Housewares of other than porcelain or china	646,993	143,321	22	9
Housewares of porcelain or china	791,211	146,846	19	9
PLASTICWARE	**1,715,865**	**226,441**	**13**	**14**
Other household and toilet articles of regenerated cellulose	528,228	66,472	13	4
Household and toilet articles of regenerated cellulose	14,897	989	7	0.1
Tableware and kitchenware of plastics	1,172,741	158,980	14	10
GLASSWARE	**1,482,098**	**138,520**	**9**	**8**
Other glassware of lead crystal	212,568	2,912	1	0.2
Glassware of a kind used for table etc. purposes of tough. glass	348,050	42,694	12	3
Glassware of glass having a linear coefficient etc.	73,513	2,259	3	0.1
Glassw. of a kind used for table etc. purposes (lead crystal)	70,756	3,711	5	0.2
Drinking glasses of tough. glass	586,106	77,750	13	5
Drinking glasses of lead crystal	141,255	7,107	5	0.4
Glassware of glass-ceramics	49,850	2,088	4	0.1

Source: Eurostat (1998)

Housewares imported into the EU by country (value in US$ thousand, volume in tonnes), 1995-1997

	1995		**1996**		**1997**		**Trends**
	value	**volume**	**value**	**volume**	**value**	**volume**	
Germany	1,896,521	433,960	1,995,728	437,918	1,797,505	443,491	↗↘
United Kingdom	766,212	194,906	925,673	230,963	1,048,364	281,779	↗
France	913,753	234,259	952,060	235,705	995,924	278,542	↗
Italy	597,160	118,748	622,761	118,351	605,914	134,535	↗↘
The Netherlands	536,694	130,277	569,378	148,827	556,523	159,877	↗↘
Belgium & Luxembourg	485,831	104,345	561,174	111,589	548,710	122,945	↗↘
Austria	371,114	81,659	440,384	64,339	478,954	66,227	↗
Spain	376,408	90,957	462,026	111,977	462,940	148,048	↗
Sweden	190,816	40,007	225,689	44,407	222,051	49,806	↗↘
Denmark	220,701	47,404	204,783	42,114	199,798	46,057	↘
Greece	161,847	48,373	221,659	63,320	198,695	630,184	↗↘
Portugal	106,046	27,317	127,088	30,536	131,130	36,127	↗
Ireland	92,350	16,877	110,979	18,595	118,900	22,218	↗
Finland	84,749	16,129	95,575	17,598	97,077	19,160	↗
EU	**6,800,203**	**1,585,218**	**7,514,930**	**1,676,239**	**7,462,492**	**2,438,996**	↗↘

Source: Eurostat (1998)

EXPORTS

THE EU

Exports of tableware, kitchenware, household articles and toilet articles of plastics, wood, glass and metal from the EU (value in US$ thousand, volume in tonnes), 1995-1997

	1995		**1996**		**1997**	
	value	**volume**	**value**	**volume**	**value**	**volume**
TOTAL HOUSEWARES	**7,807,397**	**1,559,289**	**8,756,631**	**1,681,737**	**8,590,827**	**1,842,646**
GLASSWARE	**2,381,127**	**657,085**	**2,425,804**	**678,714**	**2,436,805**	**721,532**
Of glass ceramics	36,657	7,298	33,418	7,440	31,287	6,788
Drinking glasses of lead crystal	268,244	28,772	251,951	30,049	282,130	34,632
Drinking glasses of toughened glass	827,532	309,026	813,098	308,286	786,090	331,609

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
Other than drinking glasses of other than of glass ceramics	198,665	25,429	203,148	24,462	155,060	19,014
Of glass having a linear coefficient etc.	137,787	44,958	141,101	48,432	144,608	52,179
Glassware (other than drinking glasses)	637,599	228,689	673,069	244,694	637,287	260,614
Other glassware	274,642	12,913	310,020	15,351	400,342	16,696
PLASTICWARE	**1,687,653**	**324,183**	**1,581,308**	**318,365**	**1,589,621**	**365,972**
Tableware and kitchenware of plastic	1,148,175	212,646	1,027,661	192,440	1,072,695	238,636
Household and toilet articles of regenerated cellulose	8,489	1,249	9,721	1,475	9,320	1,532
Other household and toilet articles of regenerated cellulose	530,989	110,288	543,925	124,450	507,605	125,804
METALWARE	**1,293,776**	**177,554**	**2,063,425**	**271,155**	**1,941,763**	**301,241**
Housewares of iron or steel	**1,293,776**	**177,554**	**1,384,658**	**183,822**	**1,269,896**	**206,509**
Other household articles of iron or steel	414,389	90,334	405,530	88,170	393,730	95,674
Of stainless steel	108,177	21,043	106,091	20,460	91,634	19,911
Of iron (other than cast iron) or steel, enamelled	718,260	55,920	817,224	63,976	735,082	78,689
Of cast iron	52,949	10,257	55,813	11,216	49,450	12,235
Housewares of aluminium	**0**	**0**	**657,491**	**86,252**	**649,918**	**93,495**
Housewares of copper	**0**	**0**	**21,276**	**1,081**	**21,948**	**1,237**
CERAMICWARE	**1,869,262**	**358,962**	**1,920,038**	**364,639**	**1,889,557**	**402,700**
Housewares of porcelain or china	1,090,750	111,145	1,108,516	120,242	1,061,184	131,617
Housewares of other than porcelain or china	778,511	247,817	811,521	244,397	828,372	271,083

continued

continued	1995		1996		1997	
	value	**volume**	**value**	**volume**	**value**	**volume**
CUTLERY	**496,752**	**27,276**	**683,959**	**34,670**	**652,548**	**36,584**
Spoons, forks, ladles, skimmers, etc.	**353,149**	**19,619**	**368,160**	**22,336**	**361,514**	**23,162**
Other	115,004	5,750	123,819	7,506	115,067	7,394
Plated with precious metal	27,642	484	31,999	602	36,848	654
Other sets of assorted articles	167,909	11,139	172,003	11,823	175,521	13,003
Sets of assorted articles plated with precious metal	42,595	2,246	40,340	2,405	34,079	2,111
Knives with cutting blades	**143,603**	**7,657**	**315,799**	**12,334**	**291,034**	**13,422**
Blades	33,321	1,701	34,989	1,812	31,753	2,195
Knives having other than fixed blades	0	0	53,215	1,829	48,944	1,867
Other knives having fixed blades	0	0	114,900	2,898	106,169	3,275
Table knives having fixed blades	59,488	3,184	64,221	3,447	58,096	3,599
Sets of assorted articles	50,794	2,772	48,474	2,348	46,072	2,486
WOODWARE	**78,828**	**14,229**	**82,099**	**14,194**	**80,534**	**14,617**
Of tropical wood	6,820	2,272	4,643	862	6,626	1,406
Of other wood	72,008	11,957	77,456	13,332	73,908	13,211

Source: Eurostat (1998)

EU exports of housewares by country (value in US$ thousand, volume in tonnes), 1995-1997

	1995		1996		1997		Trends
	value	volume	value	volume	value	volume	
France	1,696,084	408,695	1,841,433	444,395	1,886,884	484,358	↗
Italy	1,364,390	360,970	1,796,646	407,644	1,716,665	452,347	↗↘
Germany	1,496,290	191,062	1,517,611	197,056	1,426,717	211,922	↗↘
United Kingdom	886,564	139,770	962,890	147,833	1,011,794	158,043	↗
Belgium & Luxembourg	676,204	105,829	746,940	119,207	709,193	126,032	↗↘
The Netherlands	391,069	81,841	432,524	89,023	387,919	133,864	↗↘
Austria	192,807	50,573	249,929	36,790	317,584	29,275	↗↘
Portugal	276,967	71,522	294,224	77,664	303,193	87,954	↗
Spain	315,811	87,116	362,856	95,155	301,591	90,458	↗↘
Sweden	155,151	26,241	186,450	27,528	175,428	29,796	↗↘
Denmark	171,900	15,508	178,141	14,521	153,485	13,329	↗↘
Ireland	108,791	3,226	102,089	8,347	117,172	5,063	↘↗
Greece	41,525	11,877	47,121	11,638	44,367	14,312	↗↘
Finland	33,835	5,059	37,784	4,936	38,841	5,893	↗
EU	**7,807,397**	**1,559,289**	**8,756,631**	**1,681,737**	**8,590,827**	**1,842,646**	↗↘

Source: Eurostat (1998)

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL
Internationalisation Standardisation Institute (ISO)

Address:	Rue de Varembé 1, P.O. Box 56, CH-1211 Geneva 20, Switzerland
Telephone:	+41 (0)22 749 01 11
Fax:	+41 (0)22 733 34 30
E-mail:	central@isocs.iso.ch
Internet:	http://www.iso.ch

EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Normalisation Committee

Address:	Third countries Unit, Rue de Stassart 36, B-1050 Brussels, Belgium
Telephone:	+32 (0)2 550 08 11
Fax:	+32 (0)2 550 08 19
E-mail:	infodesk@cenclcbel.be
Internet:	http://www.cenorm.be

Comité Européen de Normalisation de Electrotechnique (CENELEC)

Address:	Third countries Unit, Rue de Stassart 36, B-1050 Brussels, Belgium
Telephone:	+32 (0)2 519 68 71
Fax:	+32 (0)2 519 69 19
E-mail:	cenelec@cenclcbel.be

SGS European Quality Certification Institute E.E.S.V.

Address:	P.O. Box 200, 3200 AE Spijkenisse, The Netherlands
Telephone:	+31 (0)181-693750
Fax:	+31 (0)181-693582
E-mail:	sgs.ti.nl@sgsgroup.com
Internet:	http://www/sgs/nl

BELGIUM
Institut Belge de Normalisation (IBN)

Address:	Avenue de la Brabanáonnelaan 29, B-1000 Brussels, Belgium
Telephone:	+32 (0)2 734 92 05
Fax:	+32 (0)2 733 42 64
E-mail:	belgische.normen@ibn.be

FINLAND
Suomen Standardisoimisliito r.y. (SFS)

Address:	P.O. Box 116, 00241 Helsinki, Finland
Telephone:	+358 (0)9 149 93 31
Fax:	+358 (0)9 146 49 25

FRANCE

Association Françiase de Normalisation (AFNOR)

Address:	Tour Europe - Cedex 7, 92080 Paris la Défense, France
Telephone:	+33 (0)1 429 15 555
Fax:	+33 (0)1 429 15 656

GERMANY

Deutsches Institut für Normung eV (DIN)

Address:	Burggrafenstrasse 6-10, D-10787 Berlin, Germany
Telephone:	+49 (0)30 260 11
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E-mail:	briesenmeister@vertr.de
Internet:	http://www.din.de

RAL, Deutsches Institut für Gütesicherung & Kennzeichnung

Address:	Siegburger Strasse 39, D-53757 Sankt Augustin, Germany
Telephone:	+49 (0)2241 1605 23
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GREECE

Hellenic Organisation for Standardisation

Address:	313 Acharnon, 1145 Athens, Greece
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ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Address:	Via Battinotti Stassi 11, 20100 Milano, Italy
Telephone:	+39 (0)02 700 24 1
Fax:	+39 (0)02 701 06 106
E-mail:	presidenzi@uni.unicei.it

IRELAND

National Standards Authority of Ireland (NSAI)

Address:	Glasnevin, Dublin 9, Ireland
Telephone:	+353 (0)1 807 38 00
Fax:	+353 (0)1 807 38 44

THE NETHERLANDS

Nederlands Normalisatie Instituut (NNI)

Netherlands Standardisation Institute

Address:	P.O. Box 5059, 2600 GB Delft, The Netherlands
Telephone:	+31 (0)15 269 0390
Fax:	+31 (0)15 269 0190
Internet:	http://www.nni.nl

PORTUGAL
Instituto Portugues da Qualidade (IPQ)

Address:	Rua Cá Avenida dos Trés Vales, 2825 Monte de Caparica, Portugal
Telephone:	+351 (0)1 2948102
Fax:	+351 (0)1 2948223

SPAIN
Instituto Español Normalization y Certificacion (AENOR)

Address:	Genova 6, 28004 Madrid, Spain
Telephone:	+34 (0)91 432 6000
Fax:	+34 (0)91 310 4032
E-mail:	informacion@aenor.es
Internet:	http://www.aenor.es

SWEDEN
Standardiseringskommissionen i Sverige (SIS)

Address:	P.O. Box 6455, 11382 Stockholm, Sweden
Telephone:	+46 (0)8 6103000
Fax:	+46 (0)8 307757
E-mail:	info@sis.se

UNITED KINGDOM
British Standards Institution (BSI)

Address:	389 Chiswick High Road, London W4 4IL, United Kingdom
Telephone:	+44 (0)171 6299000
Fax:	+44 (0)171 9967400
Internet:	http://www.bsi.org.uk

APPENDIX 4 SOURCES OF PRICE INFORMATION

Blokker B.V.

Address:	P.O. Box 94072, 1090 GB Amsterdam, The Netherlands
Telephone:	+31 (0)20 5683568
Telefax:	+31 (0)20 6651467
E-mail:	blokker@blokker.nl

De Bijenkorf B.V.

Address:	P.O. Box 12870, 1100 AW Amsterdam, The Netherlands
Telephone:	+31 (0)20 6218080
Telefax:	+31 (0)20 6973926

Vroom & Dreesmann Warenhuis B.V.

Address:	P.O. Box 276, 1000 AG Amsterdam, The Netherlands
Telephone:	+31 (0)20 5959111
Telefax:	+31 (0)20 6926150

Xenos

Address:	P.O. Box 3385, 5203 DJ 's Hertogenbosch, The Netherlands
Telephone:	+31 (0)73 6419955
Telefax:	+31 (0)73 6411675

MAILORDER

Wehkamp B.V.

Address:	Meeuwenlaan 2 BZ Zwolle, The Netherlands
Telephone:	+31 (0)38 4973495
Telefax:	+31 (0)38 4973580
Internet:	http://www.wehkamp.nl

APPENDIX 5 TRADE ASSOCIATIONS

EUROPE

Liasion Office of the European Ceramic Industries

Address:	Rue de colonies 18-24, B-1000 Brussels, Belgium
Telephone:	+32 (0)2 5113012
Telefax:	+32 (0)2 5115174
E-mail:	cerame@club.innet.be

Federation of the European Cutlery Flatware Holloware and Cookware Industries

c/o Industrieverband HKt

Address:	Neuenhofer Strasse 24, D-5650 Sollingen 17, Germany
Telephone:	+49 (0)212 881440
Telefax:	+32 (0)212 880139

BELGIUM

Fédération Européenne des Industries de Porcelaine et de Faïence de Table et d'Ornementation

Address:	Rue de colonies 18-24, B-1000 Brussels, Belgium
Telephone:	+32 (0)2 5113012
Telefax:	+32 (0)2 5115174

GERMANY

Haushal-, Kuchen- und Tafelgerate

Address:	c/o Industrieverband HKt, Neuenhofer Strasse 24, D-5650 Sollingen 17, Germany
Telephone:	+49 (0)212 881440
Telefax:	+49 (0)212 880139

Verband der Keramischen Industrie e.V.

Address:	Postfach 1624, D-95090 Selb, germany
Telephone:	+49 (0)9287 8080
Telefax:	+49 (0)9287 70492
E-mail:	info@keramverband.de
Internet:	http://www.keramverband.de

FRANCE

Chambre Syndicale Française de la Céramique de Table et Ornementation

Address:	Rue Vicor Hugo 15, F-75116 Paris, France
Telephone:	+33 (0)1 45001856
Telefax:	+33 (0)1 45004756

ITALY

Associazione Nazionale Industria Meccanica Varia ed Affine

Address:	Via Battistotti Sassi 11, I-20123 Milan, Italy
Telephone:	+390 (0)2 73971
Telefax:	+390 (0)2 7397316

PORTUGAL

Associacao Portugues de Ceramica

Address:	Rue Artilharia um 104-2, P-1099 Lisboa, Portugal
Telephone:	+351 (0)1 3875262
Telefax:	+351 (0)1 52986

THE NETHERLANDS

Mixed Branch (Gemengde Branche - Gebra) Association

Address:	Ierlandlaan 2, 2713 HL Zoetermeer, The Netherlands
Telephone:	+31 (0)79 3514321
Fax:	+31 (0)79 3200635
E-mail:	info@gebra.nl
Internet:	http://www.gebra.nl

Algemene Vereniging voor de Nederlandse Aardewerkindustrie

Address:	Postbus 473, 6800 AL Arnhem, The Netherlands
Telephone:	+31 (0)26 4428222
Telefax:	+31 (0)26 4454539

UNITED KINGDOM

British Hardware & Housewares Manufacturers' Association

Address:	Brooke House, 4 The Lakes, Bedford road, Northampton NN4 7YD, United Kingdom
Telephone:	+44 (0)1604 622023
Telefax:	+44 (0)1604 631252
E-mail:	bhhma@brookehouse.co.uk
Internet:	http://www.bhhma.com

British Ceramic Manufacturers' Federation

Address:	Federation House, Station Road, GB-ST$ 2SA Stoke-on-trent, United Kingdom
Telephone:	+44 (0)1782 744631
Fax:	+44 (0)1782 744102
Internet:	http://www.ceramfed.co.uk

APPENDIX 6 TRADE FAIR ORGANISERS

BELGIUM
Cado & Deco Center

Address:	Brussels International Trade Mart, Atomiumsquare 211, B-1020 Brussels, Belgium
Telephone:	+32 (0)2 478 4989
Telefax:	+32 (0)2 478 6258
E-mail:	bitm@infoboard.be
Internet:	http://www.ib.be/bitm

Europacado

Address:	Brussels International Trade Fair, Place de Belgique, B-1020 Brussels, Belgium
Telephone:	+32 (0)2 474 8277
Telefax:	+32 (0)2 474 8390
E-mail:	fib@bitf.be
Internet:	http://www.bitf.be

DENMARK
Formland

Address:	Unit Messer A/S, Konggevejen 84, P.O. Box 868, DK-2840 Holte, Denmark
Telephone:	+45 (0)4 5425711
Telefax:	+45 (0)4 5425254
E-mail:	unitmesser@unitmesser.dk
Internet:	http://www.unitmesser.dk

FRANCE
Maison & Objet

Address:	Safi, 4 Passage Roux, 75017 Paris, France
Telephone:	+33 (0)1 44 29 02 00
Telefax:	+33 (0)1 44 29 02 01
E-mail:	info@decoplanet.com
Internet:	http://www.decoplanet.com

GERMANY
Ambiente and Tendence

Address:	Messe Frankfurt GmbH , P.O. Box 15 02 10, 60062 Frankfurt Am Main, Germany
Telephone:	+49 (0)69 75750
Telefax:	+49 (0)69 75756433
E-mail:	ambiente@messefranfurt.com, or tendence@messefrankfurt.com
Internet:	http://www.ambiente-frankfurt.de or http://www.tendence.de

ITALY

Macef

Address:	Fiera di Milano, Largo Domodossola 1, I-20145 Milan, Italy
Telephone:	+39 (0)02 485501
Telefax:	+39 (0)02 48004423
E-mail:	macef@planet.it
Internet:	http://www.fmi.it

SPAIN

Intergift International Gift Fair

Address:	IFEMA, Parque ferial Juan Carlos I, 28042 Madrid, Spain
Telephone:	+34 (0)9 17 22 50 22
Telefax:	+34 (0)9 17 22 57 92
E-mail:	intergift@ifema.es
Internet:	http://www.intergift.ifema.es

SWEDEN

Formex

Address:	Solooentunamässan AB, P.O. Box 174, S-191 23 Sollentuna, Sweden
Telephone:	+46 (0)8 92 59 00
Telefax:	+46 (0)8 92 97 74
E-mail:	info@sollfair.se
Internet:	http://www.sollfair.se

THE NETHERLANDS

Jaarbeurs Trade Mart Spring and Autumn Fair

Address:	Koninklijke Jaarbeurs, P.O. Box 8500, 3503 RM Utrecht, The Netherlands
Telephone:	+31 (0)30 2955705
Telefax:	+31 (0)30 2955409
E-mail:	info@jaarbeursutrecht.nl
Internet:	http://www.jaarbeursutrecht.nl

UNITED KINGDOM

Spring and Autumn Fair Birmingham

Address:	Trade Promotion Services, Exhibition House, Warren Lane, Woolwich, London SE 18 6 BW, United Kingdom
Telephone:	+44 (0)181 301 8663
Telefax:	+44 (0)181 316 5719
E-mail:	sfb@tps.emap.co.uk (spring fair), afb@tps.emap.co.uk (autumn fair)
Internet:	http://www.gift-gardenmart.com

Housewares International

Address:	Trade Promotion Services, Exhibition House, Warren Lane, Woolwich, London SE 18 6 BW, United Kingdom
Telephone:	+44 (0)181 301 8663
Telefax:	+44 (0)181 316 5719
E-mail:	housewares@tps.emap.co.uk

Top Drawer Summer

Address:	P&O Events, Room 455, Earlscourt Exhibition Center, 1 Warwick Road, SW 59 TA London, United Kingdom
Telephone:	+44 (0)171 370 8350
Telefax:	+44 (0)171 370 8235
E-mail:	topdrawer@eco.co.uk
Internet:	http://www.topdrawer.co.uk or http://www.eco.co.uk/poevent/harrogf

Home & Gift 2000

Address:	P&O Events, Room 455, Earls Court Exhibition Center, 1 Warwick Road, SW 59 TA London, United Kingdom
Telephone:	+44 (0)171 370 8216
Telefax:	+44 (0)171 370 8235
E-mail:	homegift@eco.co.uk
Internet:	http://www.homeandgift.co.uk/index.html or http://www.eco.co.uk/poevent/harrogf

APPENDIX 7 TRADE PRESS

FRANCE

Officiel de L'Equipement Ménager

Address:	26 Allee Jules Milhau, 34265 Montpellier Cedex 2, France
Tel:	+33 (0)4 67588228
Fax:	+33 (0)4 67923886
E-mail:	sodiep@wanadoo.fr
Internet:	http://www.cuisirama.com

Table et Cadeau

Address:	CEPP, 96 Boulevard Richard Lenoir, 75011 Paris, France
Tel:	+33 (0)155 28 1700
Fax:	+33 (0)155 28 1717
Email:	message@cepp.fr
Internet:	http://www.cepp.fr

GERMANY

Eisenwaren-Zeitung and Hausrat Zeitung

Address:	Eisenwaren Zeitung GmbH, P.O. box 100461, Neuss 1, Germany
Tel:	+49 (0)2131 916511
Telefax:	+49 (0)2131 916515

Die Schaulade and Present

Address:	Meisenbach-Verlag GmbH, Franz Ludwigstrasse 7a, D-96047 Bamberg, Germany
Tel:	+49 (0)951861122
Telefax:	+49 (0)951861158
E-mail:	dieschalade@maisenbach.de or present@maisenbach.de
Internet:	http://www.maisenbach.de

THE NETHERLANDS

Gemengde Branche

Address:	Vereniging Gebra, Ierlandlaan 2, NL-2713 HL Zoetermeer, The Netherlands
Tel:	+31 (0)79 3219251
Telefax:	+31 (0)79 3200635
E-mail:	stiva@gebra.nl
Internet:	http://www.gebra.nl

Trend

Address:	Blauw Media Uitgeverij b.v., P.O. Box 1043, 3600 BA Maarssen, The Netherlands
Tel:	+31 (0)346 574040
Telefax:	+31 (0)346 576056
E-mail:	trend@blauwmedia.demon.nl

UNITED KINGDOM

Tableware International

Address:	DMG, 2 Queensway, Redhill, Surrey RH1 1QS, United Kingdom
Tel:	+44 (0)1737 855523
Telefax:	+44 (0)1737 855474
E-mail:	bmartin@dmg.co.uk
Internet:	http://www.dmg.co.uk/tableware

APPENDIX 8 TRADE PROMOTION ORGANISATIONS

INTERNATIONAL
International Trade Centre (ITC)

Address:	Palais des Nations, P.O. Box 10, 1211 Geneva 10, Switzerland
Telephone:	+41 (0)22 7300111
Fax:	+41 (0)22 7334439
E-mail:	itcreg@intracen.org
Internet:	http://www.intracen.org

AUSTRIA
Austrian Federal Economic Chamber

Address:	Wiedner Hauptstrasse 63, P.O. Box 150, 1045 Vienna, Austria
Telephone:	+43 (0)1 501050
Fax:	+43 (0)1 50206255
E-mail:	hotline@wkoe.wk.or.at
Internet:	http:// www.wk.or.at/wk/aw/aw_intl/

DENMARK
DIPO, Danish Import Promotion Office for Products from Developing Countries

Address:	Danish Chamber of Commerce, Børsen, 1217 Copenhagen K, Denmark
Telephone:	+45 (0)33 950500
Fax:	+45 (0)33 325216
E-mail:	dok@commerce.dk
Internet:	http://148.81.17.99/index.htm

GERMANY
GTZ/PROTRADE, German Agency for Technical Cooperation

Address:	Dag-Hammarskjöld-weg 1-5, P.O. Box 5180, 65726 Eschborn, Germany
Telephone:	+49 (0)6196 790000
Fax:	+49 (0)6196 797414
E-mail:	postmaster@gtz.de
Internet:	http://www.gtz.de/home/english/index.html

BfAI, Federal Office of Foreign Trade Information; offices in Berlin and Cologne

Address:	Scharnhorststrasse 36, P.O. Box 650268, 13302 Berlin, Germany
Telephone:	+49 (0)30 2014 52 00
Fax:	+49 (0)30 2014 52 04
and:	
Address:	Agrippastrasse 87-93, P.O. Box 100522, 50455 Cologne, Germany
Telephone:	+49 (0)221 205 70
Fax:	+49 (0)221 205 72 12
E-mail:	106035.377@compuserve.com
Internet:	http://www.bfai.com/home_b3.htm

ITALY
ICE, National Institute for Foreign Trade

Address:	Via Liszt 21, P.O. Box 10057, 00144 Rome, Italy
Telephone:	+39 (0)06 59921
Fax:	+39 (0)06 5964 7438
E-mail:	coopint@ice.it
Internet:	http://www.ice.it

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	+31 (0)10 2013434
Fax:	+31 (0)10 4114081
E-mail:	cbi@cbi.nl
Internet:	http://www.cbi.nl

NORWAY
Norad, Norwegian Agency for Development Co-operation

Address:	Tolbugaten 31, P.O. Box 8034 Deo, Oslo, Norway
Telephone:	+41 (0)22 314400
Fax:	+41 (0)22 314403
E-mail:	postmottak@oslo.norad.telemax.no

SWEDEN
SIDA, Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation

Address:	Sveavägen 20, S-105 25 Stockholm, Sweden
Telephone:	+46 (0)8 6985000
Fax:	+46 (0)8 6208864
E-mail:	sida@sida.org.se
Internet:	http://www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme

Address:	Avenue de l'Avant-Poste 4, CH-1001 Lausanne, Switzerland
Telephone:	+41 21 320 32 31
Telefax:	+41 21 320 73 37
E-mail:	mdarbre@osec.ch
Internet:	http://www.goldnet.ch/osec/

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

International Chamber of Commerce

Address:	38, cours Albert 1er, 75008 Paris, France
Telephone:	+33 (0)1 49532828
Fax:	+33 (0)1 49532942
Internet:	http://www.worldchambers.com

EUROPEAN UNION

Bureau for official EU publications

Address:	Directorate General for External Relations, 200, Rue de la Loi, 1049 Brussels, Belgium
Telephone:	+32 (0)2 2991111
Fax:	+32 (0)2 2969931
Internet:	http://europe.eu.int

Eurostat

Address:	Datashop, 2, Rue Jean Ingling, L-1466 Luxembourg, Luxembourg
Telephone:	+352 (0)43 352251
Fax:	+352 (0)43 3522221
E-mail:	agnesn@eurostat.datashop.lu
Internet:	http://www.europa.eu.int/eurostat.html

BELGIUM

Association of European Chambers of Commerce and Industry

Address:	Rue Archimède 5, 1040 Brussels, Belgium
Telephone:	+32 (0)2 2310715
Fax:	+32 (0)2 2300038
E-mail:	Eurocham@mail.interpac.be
Internet:	http://www.ecu-notes.org/atoz997/eurocham.html

Commission of the European Communities DG XI - A - 2

Address:	Rue de la Loi 200, 1049 Brussels, Belgium
Telephone:	+32 (0)2 2957755
Fax:	+32 (0)2 2955684
E-mail:	ecolabel@dg11.cec.be

GERMANY

Federal Statistical Office

Address:	Gustav-Stresemann-Ring 11, D-65189 Wiesbaden, Germany
Telephone:	+49 (0)611 752405
Fax:	+49 (0)611 753330
E-mail:	auskunftdienst@stba.bund400.de

THE NETHERLANDS

Central Statistics Bureau (CBS)

Address:	P.O. Box 4000, 2270 JM Voorburg, The Netherlands
Telephone:	+31 (0)70 3373800
Fax:	+31 (0)70 3877429
E-mail:	infoserve@cbs.nl
Internet:	http://www.cbs.nl

Centrale dienst voor In- en Uitvoer

Central Service for Imports and Exports

Address:	P.O. Box 3003, 9700 RD Groningen, The Netherlands
Telephone:	+31 (0)50 5239111
Fax:	+31 (0)50 5260698

Stichting Milieukeur

The Netherlands Competent Body for the EU Ecolabel and for the Milieukeur label

Address:	Eisenhowerlaan 150, P.O. Box 17186, 2502 CD The Hague, The Netherlands
Telephone:	+31 (0)70 3586300
Fax:	+31 (0)70 3502517
E-mail:	milieukeur@milieukeur.nl
Internet:	http://www.milieukeur.nl

Chamber of Commerce

Association of Chambers of Commerce in The Netherlands

Address:	Watermolenlaan 1, 3447 GT Woerden, The Netherlands
Telephone:	+31 (0)348 426922
Fax:	+31 (0)348 424368
E-mail:	info@databank.kvk.nl
Internet:	http://www.kvk.nl

Chamber of Commerce Rotterdam

Address:	Beursplein 37, P.O. Box 30025, 3011 DA Rotterdam, The Netherlands
Telephone:	+31 (0)10 4057777
Fax:	+31 (0)10 4145754
E-mail:	post@rotterdam.kvk.nl
Internet:	http://www.kvk.nl

EIM

Economic Institute for small and medium-sized firms

Address:	P.O. Box 151, 2594 AG The Hague, The Netherlands
Telephone:	+31 (0)79 413634
Fax:	+31 (0)79 415024
E-mail:	Info@EIM.nl
Internet:	http://www.EIM.nl

Economische Voorlichtingsdienst (EVD)
Netherlands Foreign Trade Agency

Address:	Bezuidenhoutseweg 181, P.O. Box 20105, 2500 EC The Hague, The Netherlands
Telephone:	+31 (0)70 3798933
Fax:	+31 (0)70 3797878
E-mail:	evdvp@euronet.nl
Internet:	http://www.evd.nl

Greenbuss®
CBI's Environement-Trade-Technology database

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	+31 (0)10 2013434
Fax:	+31 (0)10 4114081
E-mail:	cbi@cbi.nl
Internet:	http://www.cbi.nl

Keuringsdienst van Waren
Health and Safety Standards Inspectorate for Health Protection

Address:	P.O. Box 5406, 2280 HK Rijswijk, The Netherlands
Telephone:	+31 (0)70 3407911
Fax:	+31 (0)70 3407834

Max Havelaar Foundation (Stichting Max Havelaar)

Address:	Eisenhowerlaan 150, 2517 KP The Hague, The Netherlands
Telephone:	+31 (0)70 3586300
Fax:	+31 (0)70 3502517
E-mail:	icreg@euronet.nl
Internet:	http//www.maxhavelaar.nl

Ministry of Finance
Import duties, tariffs, taxes and regulations

Address:	Korte Voorhout 7, 2511 CW The Hague, The Netherlands
Telephone:	+31 (0)70 3428000
Fax:	+31 (0)70 3766022

SDU Service Centre
Government Publications Office (Staatsdrukkerij)

Address:	P.O. Box 20014, 2500 EA The Hague, The Netherlands
Telephone:	+31 (0)70 3789880
Fax:	+31 (0)70 3789783
E-mail:	sdu@sdu.nl
Internet:	http://www.sdu.nl

The Netherlands Ministry of Housing, Spatial Planning and the Environment (VROM)
Provides information on environmental regulations

Address:	P.O. Box 30945, 2500 GX The Hague, The Netherlands
Telephone:	+31 (0)70 3393939
Fax:	+31 (0)70 3391296

The Netherlands Ministry of Public Health, Welfare and Sports (VWS)
Provides information on safety and health regulation

Address:	P.O. Box 20350, 2500 EJ The Hague, The Netherlands
Telephone:	+31 (0)70 3407911
Fax:	+31 (0)70 3407834
Internet:	http://www.minvws.nl

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea).

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Aruba
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
French Polynesia
Gabon
Gambia
Georgia
Ghana
Gibraltar
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Libya
Macao
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States of
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Netherlands Antilles
New Caledonia
Nicaragua
Niger
Nigeria
Niue
Northern Marianas
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
t. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Gren.
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Virgin Islands (UK)
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zaire
Zambia
Zimbabwe

APPENDIX 11 LIST OF NETHERLANDS IMPORTERS

Almela
Address: P.O. Box 34069, 3005 GB Rotterdam, The Netherlands
Telephone: +31 (0)10 5121112
Fax: +31 (0)10 5120430
E-mail: info@almela.nl
Internet: http://www.almela.nl

Bender - Delft BV
Address: Tiber 96, 2267 CD Leidschendam, The Netherlands
Telephone: +31 (0)70 3174310
Fax: +31 (0)70 4190480

Bertrams BV
Address: Gaspeldoornstraat 6, 5062 AC Oisterwijk, The Netherlands
Telephone: +31 (0)13 5219390
Fax: +31 (0)13 5282067
E-mail: bertrams.bv@worldonline.nl
(Only imports exclusive glassware)

Blok BV, Louis
Address: P.O. Box 165, 3870 Hoevelaken, The Netherlands
Telephone: +31 (0)33 2580901
Fax: +31 (0)33 2580401

Bouma Glas
Address: P.O. Box 20, 5590 AA Heeze, The Netherlands
Telephone: +31 (0)40 2261613
Fax: +31 (0)40 2263387
E-mail: bouma@IAEhv.nl

Bouter BV
Importer / wholesaler
Address: Edisonstraat 96, 2723 RR Zoetermeer, The Netherlands
Telephone: +31 (0)79 3451515
Fax: +31 (0)79 3423143
E-mail: alg@bouter.nl

Brabantia Asten BV
Address: P.O. Box 5, 5720 AA Asten, The Netherlands
Telephone: +31 (0)493 697400
Fax: +31 (0)493 696105
E-mail: sales@brabantia_asten.com

Bredemeijer BV, Metaalwarenfabriek, G.
Address: P.O. Box 435, 1200 AK Hilversum, The Netherlands
Telephone: +31 (0)35 6231718
Fax: +31 (0)35 6217496
E-mail: info@bredemijer.nl
Internet: http://www.bredemeijer.com

Buttler Equipment Services BV
Address: P.O. Box 71, 7920 AB Zuidwolde, The Netherlands
Telephone: +31 (0)528 373225
Fax: +31 (0)528 372898
E-mail: info@buttler_e_s.com

Clip BV
Address: Dalweg 5, 3707 BE Zeist, The Netherlands
Telephone: +31 (0)30 6920202/222/999
Fax: +31 (0)30 6920229
E-mail: Clip@clipbv.nl

Colombus Groep
Address: P.O. Box 6032, 6077 ZG St. Odilienberg, The Netherlands
Telephone: +31 (0)475 535454
Fax: +31 (0)475 535272

Cronim
Address: P.O. Box 43, 6720 AA Bennekom, The Netherlands
Telephone: +31 (0)318 417565
Fax: +31 (0)318 417597

Dilka (Nederland) BV
Address: Jan van der Heijdenstraat 14-16, 2665 JA Bleiswijk, The Netherlands
Telephone: +31 (0)10 5218531
Fax: +31 (0)10 5218969

Emro Im-Export BV
Address: P.O. Box 77, 1420 AB Uithoorn, The Netherlands
Telephone: +31 (0)297 565951
Fax: +31 (0)297 540166
E-mail: emro@euronet.nl

Fissler Nederland BV
Address: P.O. Box 313, 4600 AH Bergen op Zoom, The Netherlands
Telephone: +31 (0)164 243050
Fax: +31 (0)164 241917

Forsta Nederland BV

Address:	P.O. Box 6212, 4000 HE Tiel, The Netherlands
Telephone:	+31 (0)344 615470
Fax:	+31 (0)344 621406
E-mail:	Forsta@wxs.nl

Glasheinz BV

Address:	P.O. Box 40, 9520 AA Nieuw Buinen, The Netherlands
Telephone:	+31 (0)599 633333
Fax:	+31 (0)599 633500
E-mail:	info@glasheinz.nl

Habo Handelsonderneming

Address:	De Run 4533, 5503 LT Veldhoven, The Netherlands
Telephone:	+31 (0)40 2535803
Fax:	+31 (0)40 2543623

Haka Trading BV

Address:	P.O. Box 193, 6710 BD Ede, The Netherlands
Telephone:	+31 (0)318 631280
Fax:	+31 (0)318 623422

Heja VOF Home Accessoires/Transporten

Address:	P.O. Box 20, 2450 AA Leimuiden, The Netherlands
Telephone:	+31 (0)252 672545
Fax:	+31 (0)252 674011

Hendi

Address:	P.O. Box 88, 3900 AB Veenendaal, The Netherlands
Telephone:	+31 (0)318 520123
Fax:	+31 (0)318 529895
E-mail:	info@hendi.nl
Internet:	http://www.hendi.nl

Hit Trading BV

Address:	P.O. Box 76, 3770 AB Barneveld, The Netherlands
Telephone:	+31 (0)342 490499
Fax:	+31 (0)342 491866
E-mail:	hit@hit_trading.com
Internet:	http://www.hit-trading.com

Holland Jonkers BV

Address:	P.O. Box 25, 4700 AA Roosendaal, The Netherlands
Telephone:	+31 (0)165 550200
Fax:	+31 (0)165 550928

Homecraft (Nederland) BV

Address:	Kelvinring 5, 2950 BG Alblasserdam, The Netherlands
Telephone:	+31 (0)78 6914440
Fax:	+31 (0)78 6990966
E-mail:	sales@homecraft.com
Internet:	http://www.homecraft.nl

Homeij Oisterwijk BV

Address:	P.O. Box 17, 5060 AA Oisterwijk, The Netherlands
Telephone:	+31 (0)13 5282804
Fax:	+31 (0)13 5285315
E-mail:	info@homeij.nl

Inspiration Holland BV

Address:	P.O. Box 3021, 2220 CA Katwijk, The Netherlands
Telephone:	+31 (0)71 4091616
Fax:	+31 (0)71 4091622

J. Hakbijl

Address:	P.O. Box 109, 8200 AC Lelystad, The Netherlands
Telephone:	+31 (0)320 231141
Fax:	+31 (0)320 231558

J.W. Redelaar Agenturen BV

Address:	Van Vredenburchweg 150, 2283 TG Rijswijk, The Netherlands
Telephone:	+31 (0)70 3904040
Fax:	+31 (0)70 3989557

Kapimex BV

Address:	Minervum 1214, 4817 ZH Breda, The Netherlands
Telephone:	+31 (0)76 5720570
Fax:	+31 (0)76 5720480

Kitchen Trend Products BV

Address:	Beethovenstraat 77, 1077 HP Amsterdam, The Netherlands
Telephone:	+31 (0)20 4712222
Fax:	+31 (0)20 4712223

L. Andriesse & Co. BV

Address:	P.O. Box 117, 5000 AC Tilburg, The Netherlands
Telephone:	+31 (0)13 5423740
Fax:	+31 (0)13 5431947

La Cucina Import Benelux

Address:	Herengracht 621, 1017 CE Amsterdam, The Netherlands
Telephone:	+31 (0)20 6383161
Fax:	+31 (0)20 6385539
E-mail:	info@lacucina.nl
Internet:	http://www.lacucina.nl

Mepal BV

Address:	Aalsvoort 45, 7241 MA Lochem, The Netherlands
Telephone:	+31 (0)573 257233
Fax:	+31 (0)573 256072

Nedac-Alveru BV

Address:	P.O. Box 1000, 6920 BA Duiven, The Netherlands
Telephone:	+31 (0)26 3194444
Fax:	+31 (0)26 3194455
E-mail:	sorbo.info@sorbo.nl
Internet:	http://www.nedacsorbo.com

Oldenhof Kookkado Winkel

Address:	Gasthuisplein 1-5, 8011 SB Zwolle, The Netherlands
Telephone:	+31 (0)38 4211222
Fax:	+31 (0)38 4220278

Patisse (Nederland) BV

Address:	Wijer 8, 5527AE Hapert, The Netherlands
Telephone:	+31 (0)497 383855
Fax:	+31 (0)497 386526

Randwijck BV

Address:	P.O. Box 1068, 6201 BB Maastricht, The Netherlands
Telephone:	+31 (0)43 3213153
Fax:	+31 (0)43 3213018

Ronel Glas Aardewerk Porselein BV

Address:	Schipholweg 1023 B, 2143 CH Boesingheliede, The Netherlands
Telephone:	+31 (0)23 5551555
Fax:	+31 (0)23 5551902

Royal Doulton Benelux BV

Address:	P.O. Box 3910, 6202 NX Maastricht, The Netherlands
Telephone:	+31 (0)43 3633322
Fax:	+31 (0)43 3631950

Schipper Zaandijk BV
Address: P.O. Box 169, 1520 AD Wormerveer, The Netherlands
Telephone: +31 (0)75 6284155
Fax: +31 (0)75 6219131

Smith's Import BV
Address: P.O. Box 1038, 3160 AE Rhoon, The Netherlands
Telephone: +31 (0)10 5014111
Fax: +31 (0)10 5012613
E-mail: smith@wxs.nl

Studiobazar BV
Address: P.O. Box 50174, 1305 AD Almere, The Netherlands
Telephone: +31 (0)36 5382000
Fax: +31 (0)36 5382001
E-mail: info@studiobazar.com
Internet: http://www.studiobazar.com

Tel International
Address: P.O. Box 21, 7630 AA Ootmarsum, The Netherlands
Telephone: +31 (0)541 291865
Fax: +31 (0)541 292105
E-mail: info@telint.nl

Termaat BV
Address: Ekkersrijt 4302, 5692 DH Son, The Netherlands
Telephone: +31 (0)499 460603
Fax: +31 (0)499 460337

Ter Steege BV
Address: P.O. Box 283, 7460 AG Rijssen, The Netherlands
Telephone: +31 (0)548 514371
Fax: +31 (0)548 518788

Van Steijn BV
Address: P.O. Box 258, 2300 AG Leiden, The Netherlands
Telephone: +31 (0)71 5899314
Fax: +31 (0)71 5410413

Wegter BV
Address: P.O. Box 336, 7550 AH Hengelo, The Netherlands
Telephone: +31 (0)74 2425425
Fax: +31 (0)74 2423905

Wouters-Intag Ned.

Address:	P.O. Box 192, 1250 AD Laren, The Netherlands
Telephone:	+31 (0)35 5310385
Fax:	+31 (0)35 5310784
E-mail:	win@dutch.nl

MAJOR MULTIPLE RETAILERS AND DEPARTMENT STORES

Blokker B.V.

Address:	P.O. Box 94072, 1090 GB Amsterdam, The Netherlands
Telephone:	+31 (0)20 5683568
Telefax:	+31 (0)20 6651467
E-mail:	blokker@blokker.nl

Xenos

Address:	P.O. Box 3385, 5203 DJ ’s Hertogenbosch, The Netherlands
Telephone:	+31 (0)73 6419955
Telefax:	+31 (0)73 6411675

De Bijenkorf B.V.

Address:	P.O. Box 12870, 1100 AW Amsterdam, The Netherlands
Telephone:	+31 (0)20 6218080
Telefax:	+31 (0)20 6973926

Vroom & Dreesmann Warenhuis B.V.

Address:	P.O. Box 276, 1000 AG Amsterdam, The Netherlands
Telephone:	+31 (0)20 5959111
Telefax:	+31 (0)20 6926150

MAILORDER

Wehkamp B.V.

Address:	P.O. box 400, 8000 AK Zwolle, The Netherlands
Telephone:	+31 (0)38 4216868
Telefax:	+31 (0)38 4973580

APPENDIX 12 HOMEPAGE USEFUL LINKS

http://www.dmg.co.uk/tableware
dmg.co.uk/tableware is an internet site with information about the magazine "*Tableware International*". Here you will find news, brands new products, trade exhibitions and subscription details. (Language: English)

http://www.keurmerk.nl
Keurmerk.nl is an internet site with general information on the various hallmarks existing in The Netherlands. This internet site is linked to http://www.milieukeur.nl, with information about the environmental hallmark in The Netherlands. Another link possible is the http://www.ecomarket.net, where you can find information on environmental hallmarks in the European Union and other European countries. (Language: Dutch, English and German)

PUTS YOU IN TOUCH WITH THE MARKETS OF EUROPE

CBI is the Centre for the Promotion of Imports from developing countries, operating since 1971 within the policy framework set by the Netherlands Minister of Foreign Affairs and the Minister for Development Co-operation. CBI supports small and medium-sized enterprises (SMEs) and trade promotion organizations (TPOs) in developing countries, in their promotion of exports to the European Union.

CBI offers export marketing services

CBI export marketing services are based on up-to-date market information and training and are organized in the form of Integrated Export Promotion Programmes for SME exporters and Bilateral Co-operation Programmes with TPOs. Those seeking CBI marketing services should fill in CBI's exporter's company profile form and provide all relevant information, such as prices, terms and product information.

CBI market information includes

- CBI News Bulletin (10 times annually), containing market news and publication of offers;
- CBI guide "Exporting to the EU, The Netherlands as the gateway to Europe";
- Product market surveys for 70 product groups;
- Quick scans on environmental, social and health issues, for 20 product groups;
- Trade Documentation Centre;
- Manuals on subjects such as technical and environmental regulations; packaging; trade fair participation, etc.
- Greenbuss® database on European trade-related environmental policy and technology.

CBI training includes

- Orientation seminars on export planning / management, trade promotion / marketing, and trade fair participation;
- Management seminars for TPO staff on the organization of collective trade fair participation;
- Workshops in developing countries.

CBI Integrated Export Promotion Programmes

For five product groups/year consist of:

- Product market testing (Special Promotions) in the CBI Product Display Centre in Rotterdam;
- Product adaptation advice at the exporter's factory;
- Export marketing seminar;
- International trade fair participation in the EU.

Market entry services

- International trade fair participation in the EU (for selected fairs other than those which are part of Integrated Export Promotion Programmes);
- Consultancy for incoming missions;
- Support to outgoing buying missions;
- Individual assistance to visitors;
- Assistance to Trade and Marketing Centres.

CBI Bilateral Trade Co-operation includes

Trade co-operation agreements with TPOs in developing countries on:

- integrated export promotion;
- trade promotion;
- business information and communication;
- training;
- market entry services.

CBI Multilateral Co-operation

CBI co-operates with multilateral organizations (ITC/WTO) and European import promoting organizations (FORUM) to globalize trade promotion.

Please write to us in English, the working language of the CBI.

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