

# The European market potential for trays

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Trays can have both functional and decorative value, and they provide consumers with often much-needed flexibility. They can be used to carry food and drinks or to display items, or as decorative objects. Design, craftsmanship, materials, functionality and sustainability will help you to add value. You can also use these features in your storytelling. European importers often distribute products across the continent, so you should not see individual countries as markets. Instead, you should focus on buyers in a specific segment.

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## 1. Product description

Home Decoration and Home Textiles (HDHT) includes several [categories consisting of various product groups](#). Trays belong to the sub-categories 'kitchenware' and/or 'home accessories'.

This study uses the following codes to indicate trade in trays:

Table 1: Product codes for trays

Harmonised System (HS)	Description
441919	Tableware and kitchenware made from bamboo (excluding chopsticks, bread boards, chopping boards and similar boards)
441990	Tableware and kitchenware made from wood other than bamboo (excluding interior fittings, ornaments, cooperage products, wooden tableware and kitchenware components, brushes, brooms and hand sieves)

Because no specific product codes are available for trays, these codes and this study's statistics cover wooden tableware and kitchenware in general. Bamboo is included, although this is technically a wood-like grass.

## Functionality

Most importantly, trays must be functional. Serving trays should be sturdy but easy to handle and not too

heavy, so that consumers can use them to carry food and drinks. An upright edge can prevent dripping if liquids are spilled. Trays can also be used as a static platform for displaying home accessories. These more decorative trays can be larger and heavier than portable trays.

## Material

Trays come in a range of materials. Wood is the most common, often combined with style elements made from other materials. The choice of wood species depends on the main purpose of the tray – functional or decorative. Species differ in durability, weight and look. For example, hardwood is strong and long-lasting, bamboo is lightweight, and olive wood has an attractive grain.

See an example here: [MAOMI – handmade tray made from mature olive wood](#)

Source: [MAOMI@ Instagram](#)

Other materials include metals, synthetics and woven grasses. Recycled or reclaimed materials are also an interesting, more sustainable option.

## Design

Trays are usually rectangular in shape, especially serving trays. Round or more organic shapes add decorative value, although they can make the trays less functional. The handles (or grips) can also have both functional and decorative value. Wooden trays often have handles in contrasting materials, such as metal or leather. Trays can also have fixed or detachable legs or be part of a tray table.

## Size

Serving trays generally range from about 27x31x3 cm to 35x50x3 cm in size. They should not weigh more than 2kg. Decorative trays can be larger and heavier, as consumers do not have to carry them around the house.

## Durability

The durability of a tray depends on what it is made from. Wooden trays can be waxed, oiled or sealed with a varnish to prevent wear and tear. Trays can be cleaned with a dry or damp cloth. Some are dishwasher-proof, depending on the material.

The European market for wooden tableware and kitchenware has grown in recent years. The COVID-19 pandemic boosted consumers' focus on the home, and on trends like 'home sweet home' and flexibility and space-saving solutions. This may continue to drive demand during Europe's [cost of living crisis](#). About two-thirds of the import value comes directly from developing countries, making Europe an interesting market for you.

Because no specific product codes are available for trays, the statistics below cover wooden tableware and kitchenware in general. Bamboo is included, although this is technically a wood-like grass.

Source: UN Comtrade

European imports of wooden tableware and kitchenware grew from €364 million in 2017 to €668 million in 2021, at an average annual rate (CAGR) of 16%. This was mainly due to a strong performance in 2021, which may include delayed shipments carried over from 2020. In 2021, European tray imports represented 44% of total worldwide imports.

Europe sourced about two-thirds of its wooden tableware and kitchenware import value directly from developing countries. These imports grew from €240 million in 2017 to €437 million in 2021. Altogether this makes Europe an interesting market for you, as an exporter from a developing country.

The effects of the COVID-19 pandemic and the war in Ukraine have disrupted international trade. At the same time, lockdowns have led to an increased focus on the home and trends like 'home sweet home' and the need for flexibility. Trays fit in well with these trends, as they can be decorative and functional at the same time. This may partially compensate for the pressure that the cost-of-living crisis has put on consumer spending. For more drivers of demand, see the section below: 'which trends offer opportunities?'

### Tip:

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

## 3. Which European countries offer most opportunities for trays?

The larger Western European economies are the main importers of trays. However, importers in these countries generally sell their products across Europe. This means that your best strategy is to focus on a particular segment, rather than a specific country.

Source: UN Comtrade

In 2021, Germany remained Europe's leading importer of wooden tableware and kitchenware with 19% of imports, followed by the United Kingdom and France with 13% each. The Netherlands (8.9%), Italy (5.9%) and Spain (5.3%) complete the list of the top 6 leading importing countries. All these markets performed well in 2021, but it is not clear whether these new trade patterns will continue.

### Focus on segments

European countries have different roles in the market. Some are mainly importers and others are mainly manufacturers. Western European countries are mainly importers. Most Western European importers are re-exporters. They do not just sell their products in their own country, but they distribute them across the continent. This explains why in HDHT, small countries like the Netherlands often import much more than they consume.

You should be aware that countries are not markets. The HDHT market consists of different segments, ranging from low-end to high-end (see our study on [market entry](#) for trays). Every European country has these segments, although their size may vary. Therefore, it makes much more sense for you to focus on a segment in your product group and to connect to importers in that segment. These importers will then sell your products in that segment across Europe.

## Consumer spending is under pressure

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

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the energy crisis that followed it. Households' expectations about the general economic situation in their country and their own

future financial situation were severely impacted. Consumers' willingness to make major purchases also fell. This lower consumer confidence may well lead to lower spending, which is reflected in modest forecasts for 2023/2024.

Source: OECD

\* 2023 and 2024 are forecasts

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

## **Germany is the largest European importer**

Europe's leading importer of wooden tableware and kitchenware is Germany. Germany's large domestic market, its role as a trade hub, and its relatively high trays imports from developing countries make this an interesting market for you.

Germany's imports grew from €76 million in 2017 to €130 million in 2021, with a CAGR of 15%. This included strong growth rates of 4.1% in 2020 and 32% in 2021. Germany's role as a key trade hub in Europe may have helped the country maintain a strong performance.

About three-quarters of Germany's import value came directly from developing countries, which is well above the European average. These imports grew from €55 million in 2017 to €97 million in 2021, with a CAGR of 16%. China is Germany's main supplier of wooden tableware and kitchenware, supplying about half of all the imports. Poland (8.1% in 2021), India (6.3%) and Vietnam (5.7%) follow.

## **France's intra-European imports have grown fast**

France is Europe's second-largest importer of ceramic and glass tableware and kitchenware. However, France seems to be turning more and more to European trade hubs like Germany, the Netherlands and Belgium for its imports. These countries have become France's leading suppliers, after China (48%). This may limit your opportunities to enter the French market directly.

France doubled its wooden tableware and kitchenware imports from €43 million in 2017 to €88 million in 2021. This included impressive growth rates of 12% in 2020 and 34% in 2021.

France's imports from other European countries grew faster than its imports from developing countries. As a result, the direct import market share of developing countries dropped from 72% in 2017 to 58% in 2021. This is the smallest share among the leading European markets.

## **Brexit may stimulate direct trade with the United Kingdom**

The United Kingdom could well offer you opportunities because of its high imports from developing countries. [The United Kingdom's withdrawal from the European Union](#) (Brexit) has led to relatively low consumer confidence levels since 2016. On the positive side, Brexit may result in British buyers becoming more interested in importing directly from developing countries, rather than from European importers. This would allow them to avoid additional fees now that they are no longer part of the European Union's single market.

British wooden tableware and kitchenware imports grew from €51 million in 2017 to €86 million in 2021, with a CAGR of 14%. About 80% of these imports came directly from developing countries, which is the largest market share in Europe. China supplied most of them.

## The Netherlands is an important European trade hub

The Netherlands is an important European trade hub, and it maintained a strong performance despite trade disruptions. This could make the country an interesting market for you.

The Netherlands' wooden tableware and kitchenware imports grew from €35 million in 2017 to €69 million in 2021, with a CAGR of 14%. About three-quarters of these came directly from developing countries, which is well above the European average. China (55% in 2021), Germany (11%), India (7.6%) and Indonesia (7.0%) are the leading suppliers.

The Netherlands depends heavily on international trade, so Brexit and international trade disputes may have a big impact on the Netherlands. This makes Dutch imports difficult to predict.

## Italy's imports from developing countries have grown

Italy could offer some opportunities, considering the strong performance of its wooden tableware and kitchenware imports. Italy was very badly affected by the pandemic, and it experienced a GDP decline of -8.8% in 2020. Nevertheless, the country managed to increase its wooden tableware and kitchenware imports from €22 million in 2017 to €39 million in 2021. This translates to a CAGR of 15%, mainly due to a 53% increase in 2021.

Italy's wooden tableware and kitchenware imports from developing countries grew from €15 million in 2017 to €29 million in 2021. As a result, the direct import market share for developing countries grew from 66% to a strong 75%. Most of this came from Italy's leading suppliers, China (59%) and Tunisia (8.1%).

## Spain faces economic struggles

Spain is the sixth-largest European import market for wooden tableware and kitchenware. The Spanish economy experienced the largest drop in Europe, with a decrease in GDP of -11% in 2020. A return to pre-pandemic levels is expected in the second half of 2023, making the Spanish economy the slowest to recover in Europe. This could limit your opportunities in Spain for the coming years.

Spain's wooden tableware and kitchenware imports doubled from €17 million in 2017 to €36 million in 2021. The 2021 imports probably include delayed shipments from 2020, as the strong 52% growth in 2021 followed a dip of -9.0% in 2020.

In 2021, about 66% of Spain's wooden tableware and kitchenware imports came directly from developing countries. This is about the European average, but considerably less than the 72-74% in previous years. Leading suppliers are China (59% in 2021), Germany (13%) and the Netherlands (9.4%).

### Tip:

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

## 4. Which trends offer opportunities on the European trays market?

The market for trays is shaped by various trends, often related to the [trends for HDHT](#) at sector level. Key topics are sustainability, functional and decorative value, and flexibility.

## Home Sweet Home: cocooning and social dining

This trend reflects the image that slightly older, [baby boomer](#) consumers have of the home as a shelter. This consumer makes the home into a retreat with a comfortable, quite luxurious interior. A central aspect of the Home Sweet Home trend is the idea of 'cocooning'. This represents the need to surround yourself with the things and people you love. It is also about families and friends enjoying each other's company, entertaining each other, cooking and dining, or just relaxing. The COVID-19 pandemic has strengthened these 2 aspects of indoor living.

Decorative objects play an important role in cocooning and creating a cosy atmosphere at home. Trays can be used both to display decorative objects and to function as decoration themselves, especially when they are hand-crafted and made from special materials.

As a result of the pandemic, [people have been spending more time socialising as a family/household and cooking](#). Many expect this to be a permanent change. Of those who started cooking more at the beginning of the pandemic, [65% were still doing so a year later](#). When imagining a post-pandemic future, [most consumers plan to do more cooking at home](#). Both increased socialising and dining together offer opportunities for trays that consumers can use to serve drinks and food.

### Functional and decorative

Social dining, or 'slow' dining, has been stimulated by the 'master chef' trend. This trend is characterised by consumers taking pride in developing and showing off their cooking skills. These at-home 'master chefs' like to use kitchenware that is more expressive than everyday items. This also upgrades and broadens the appeal of trays. With added functionality or decorative value, trays can be made to appeal to higher-end segments.

Examples of how you can add functionality include:

- Ergonomics – such as better grip or lightweight materials;
- Clever solutions to prevent spilling or dropping – such as a higher edge or anti-slip coating;
- Hygiene – such as varnishing, waxing or oiling.

Examples of how you can add decorative value include:

- Craftsmanship – techniques such as hand-carving, inlaying or joinery;
- Material – such as special wood species or combinations of materials;
- Design – colours, patterns and shapes, potentially reflecting your culture.

Trays often have both functional and decorative value. However, sometimes adding decorative value can reduce the functionality of a tray. This can particularly occur in premium segments, where consumers care more about the look of the item than its convenience. The most prominent example of premium trays is the French brand [Ibride](#). Most of their trays are made from pressed birchwood and feature surrealist decorations, such as portraits of animals dressed as royals on a black background. Labelled as 'mural trays', they can be used either as functional trays or as wall art.

### Tips:

Stay informed about the trends in food, cooking and dining via trade fairs like [Anuga](#) or [Biofach](#), [cooking programmes](#) and [magazines](#).

Experiment with techniques and combinations of materials.

## Sustainability: people and planet

Social and environmental sustainability are quickly becoming central consumer needs, also in HDHT. European consumers are increasingly adopting more sustainable lifestyles. The COVID-19 pandemic has boosted this trend. At the same time, the current cost-of-living crisis is driving the need for sustainable products to be affordable.

The pandemic has led consumers (especially young consumers) to put sustainability higher on their list of priorities. [The pandemic has made it more important that consumers and companies improve their sustainability](#). A remarkable [86% of European consumers consider sustainability to be important or very important](#). [29% deliberately and consciously buy sustainable products](#). In addition, [most consumers say that they want significant changes that will make the world fairer and more sustainable after COVID-19](#). Millennials will soon be the dominant generation of consumers. They care about sustainability and express this by buying products from companies that contribute to a better world.

For trays, the key issues relating to social and environmental sustainability include:

- Renewable materials: Is the wood species that has been used non-protected and abundant? Is the wood replanted? Is the wood traceable and responsibly traded?
- Production process: Does production take place in a safe and healthy way? Are labour contracts fair? Does the company promote gender equality and social inclusion? Is waste avoided? Is re-use encouraged? Is the dyeing process safe and non-pollutant?
- Transport: Are clean and energy-lean transport solutions available and in use? Are the packing and packaging recyclable?

Trays made from natural materials such as wood or bamboo fit in well with this trend, provided that the materials are produced responsibly. Certified and recycled materials have especially good sustainable value. The social aspects of sustainability make the story behind a product more important to consumers, so handcrafted trays offer particularly good opportunities.

See an example here: [Be Home – handmade tray made from reclaimed wood and woven seagrass](#)

Source: [Be Home @ Instagram](#)

### Tips:

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

If your products have a unique origin and/or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to your concept for you and your importer.

If your importer is interested, consider certification options, such as fair trade or [BSCI compliance](#). For more information, see our studies about [market entry for trays](#) and [buyer requirements for HDHT](#).

Read our special study on [sustainability in HDHT](#) for more information, and follow our webinar on [sustainability in the European HDHT market](#).

## Shared living: flexibility and space-saving

Rapid urbanisation and rising housing prices are driving consumers into new forms of shared living, often with multiple generations together. Spaces like the kitchen, living room and garden or balcony are shared. The bedroom is a private space, often used as a combined sleeping, working/studying and entertaining area. In such

settings, flexibility and space-saving solutions are key.

Design aspects that play into this trend include:

- Space-saving items – storing solutions, such as nesting trays;
- Multi-purpose items – trays that can function as a place holder, organiser, storage, or a display for accessories;
- Integrated furniture accessories – tray tables with removable tops.

See an example here: [H&M Home – tray table with rattan tray and meranti wooden base](#)

Source: [H&M Home & Instagram](#)

Trays with high design value can be seen as home accessories. Consumers can use them both to display and to carry other decorative objects. This makes these trays flexible, space-saving and multi-purpose at the same time.

### **Tips:**

Focus on the flexibility and convenience of your trays. For example, make them movable, multifunctional and/or nestable.

Use high-quality craft techniques that consumers can enjoy for their attractiveness.

### **Example**

In the Southwest of Bangladesh, [Rishilpi Handicrafts](#) aims to improve the lives of the people who belong to the Rishi caste. The organisation employs marginalised, outcast and disabled people. These artisans handcraft natural and recycled materials such as jute and palm leaf into products like baskets, trays and bags. They can work either from home or at the Rishilpi centre. The organisation provides a range of services, including healthcare and education support. The company also runs an Integrated Rural Development Programme that supports the social wellbeing of poor rural communities.

Rishilpi Handicrafts offers handwoven palm leaf trays in various styles, shapes and colours. Their range includes several sets of nestable trays. Such sets provide consumers with a coherent style, and they are easy to store and ship.

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

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