

Entering the European market for vases

The European market for vases offers opportunities, but the competition is strong. China continues to dominate the market, alongside competition from within the European Union. Germany, the Netherlands and Spain have shown especially strong growth in the last few years. To enter the European market, your products need to comply with mandatory (legal) requirements as imposed by the European Union. Moreover, there are additional requirements that can be demanded by European buyers and which may enhance your chances for success.

Contents of this page

1. [What requirements must vases comply with to be allowed on the European market?](#)
2. [Through what channels can you get vases on the European market?](#)
3. [What competition do you face on the European vases market?](#)
4. [What are the prices for vases on the European market?](#)

1. What requirements must vases comply with to be allowed on the European market?

What are the mandatory requirements?

When exporting to Europe, you have to comply with the following legal requirements:

- General product safety
- Packaging and packaging waste legislation
- Restricted chemicals: REACH
- Timber regulation

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including vases. It states that all products marketed in Europe must be safe to use. It provides a framework for all legislation regarding specific products and issues. If there are no specific legal requirements established for your product and its use, the General Product Safety Directive still applies. If specific requirements do apply, the Directive applies in addition to those: it covers other safety aspects which may not have been described specifically. Unsafe products are rejected at the European border or withdrawn from the market. The European Union has introduced a rapid alert system ([RAPEX](#)) to list such products.

Tips:

Read more about the [General Product Safety Directive in the EU Export Helpdesk](#).

Also use your common sense to ensure that normal use of your product does not cause any danger.

The [RAPEX database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for vases and other objects made of your specific material for an idea of what issues may arise.

Packaging

Europe has specific [packaging and packaging waste legislation](#). This EU Directive 2015/720 was adopted to

harmonise measures concerning the management of packaging and packaging waste and to prevent or reduce its impact on the environment at European level. Buyers may therefore ask you to minimise the use of packaging materials (paper, carton, plastic) or to use a different kind of (recycled) material.

Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as:

- packing cases
- boxes
- crates
- drums
- pallets
- box pallets
- dunnage

All wood packaging material and dunnage from non-European Union countries must be:

- either heat treated or fumigated in line with ISPM15 procedures;
- officially marked with the ISPM15 stamp consisting of three codes (country, producer and measure applied) and the IPPC logo;
- debarked.

These requirements do not apply to:

- wood 6mm thick or less;
- wood packaging material made entirely from processed wood produced using glue, heat and pressure, e.g. plywood, oriented strand board and veneer;
- wood packaging material used in trade within the European Union.

The objective of this Directive is to prevent organisms that are harmful to plants or plant products from being introduced into and spreading within the European Union. It also regulates imports from third countries in line with international plant health standards. Keep this in mind when you decide on the packaging of your vases.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For vases, this applies to certain substances used in the manufacturing and dyes and enamel used for decoration.

For instance, REACH restricts the use of:

- lead in the paints and glazing of ceramics
- cadmium compounds in various applications
- arsenic and creosotes as wood preservatives

Tip:

The European Chemical Agency provides useful information and tips on REACH. See, for instance, [Information on REACH for companies established outside Europe](#) and [Questions & Answers on REACH](#).

Timber Regulation

The European Union's [Timber Regulation](#) states the obligations of operators who place timber products on the European market. The regulation counters the trade of illegally harvested timber and products through three key obligations:

- It prohibits illegally harvested timber and products derived from such timber from being placed on the EU

market for the first time.

- It requires EU traders who place timber products on the EU market for the first time to exercise 'due diligence'.

Once on the market, the timber and timber products may be sold and/or transformed before they reach the final consumer. To facilitate the traceability of timber products, economic operators in this part of the supply chain (referred to as traders in the regulation) have an obligation to:

- Keep records of their suppliers and customers.

The regulation covers a wide range of [timber products](#) listed in its Annex, using EU Customs code nomenclature.

This regulation also applies to wooden vases. Products with a [FLEGT](#) or [CITES](#) license comply with the Timber Regulation.

Tips:

For more information, see the [Frequently Asked Questions about the Timber Regulation](#).

The [EU FLEGT Facility](#) has more information about FLEGT licensing.

For more information on CITES permits, you can contact your [National CITES Management Authority](#).

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market, and buyers appreciate a good story. Examples include sustainable raw materials and production processes, and the impact your company has on the environment, the well-being of your workers and society as a whole. Nowadays, an increasing number of European buyers demand the following certification schemes:

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company is audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) and read up on sustainable options. However, only niche market buyers demand compliance with such standards.

A recent [study](#) by the International Trade Centre concluded that, irrespective of the product, retailers in the major European markets are putting more products on their shelves that are environmentally and socially sustainable, simply because consumers are asking for it. According to the survey, 98.5% of retailers consider sustainability as a factor in their product sourcing decisions.

Tips:

Optimise your sustainability performance. Reading up on the issues relating to initiatives such as [BSCI](#) and [ETI](#) will give you an idea of what to focus on.

If you can show your sustainability performance, this may give you a competitive advantage. Options

for doing so include a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [ETI base code](#).

For more information, see our special study on [Sustainability in the Home Sector](#).

In addition to the requirements mentioned in the section above, please refer to our study about [buyer requirements for Home Decoration & Home Textiles](#) for a general overview of buyer requirements in Europe.

Labelling requirements

The information on the outer packaging of vases should correspond to the packing list sent to the importer. The external packaging labels for vases should include the producer name, consignee name, material used, quantity, size, volume and caution signs. Your buyer will specify what information they need on the product labels or on the item itself (e.g. logos or 'Made in...' information). This is part of the order specifications. It is common in Europe to use an EAN code or barcode on the product label. Make sure you use the English language for labelling, unless your buyer indicates otherwise

Packaging requirements

You should pack vases according to the importer's instructions. Importers have their own specific requirements for:

- the use of packaging materials
- filling boxes
- palletisation
- stowing containers

Always ask for the importer's order specifications. These are part of the purchase order.

Damage prevention

Properly packaging vases minimises the risk of damage caused by impacts. How an item is packaged for export depends on how easily it can be damaged. Packaging should ensure that the items inside a cardboard box cannot damage each other. It should also prevent damage to the boxes when they are stacked inside the container.

Dimensions and weight

Packaging must be easy to handle in terms of dimensions and weight. Standards are often related to labour regulations at the point of destination and must be specified by the buyer. Boxes are usually palletised for air or sea transport. Exporters have to maximise pallet space.

Cost reduction

Packaging must provide maximum protection. However, you should also avoid using excess materials or shipping 'air'. Waste removal is a cost for buyers. You can reduce the amount and diversity of packing materials by:

- partitioning inside the boxes, using folded cardboard
- matching inner and outer boxes by using standard sizes
- considering packing and logistical requirements when designing your products
- asking the buyer for alternatives

Payment terms

The payment term is usually agreed upon with the buyer in the order contract. Payment terms vary from buyer to buyer and are related to the volume and value of the order, the type of distribution partner, whether or not an agent is acting as an intermediary, and what delivery terms apply. In general, the payment term will be 30 or 60 days after receipt of the goods or the date of the invoice.

Occasionally a deposit or advance payment can be agreed upon. This happens, for example, in Fair Trade business relations. Certain sourcing countries have regulations stipulating 100% prepayment before delivery. This can hamper business since buyers usually shy away from such costs or will negotiate a harder price deal.

A special form of financial security is offered by Letters of Credit. The so-called L/C is often used in first transactions, but it is an expensive system and therefore not preferred by European buyers.

The payment terms are the outcome of your negotiations about the risks involved in export trade, particularly the following:

- financial risk (who funds what part of the production and transport process?)
- transportation risk (if damage or loss occurs, who pays?)
- the transfer of ownership (when do the goods change hands?)

A balanced outcome is in the interest of both the seller and the buyer and is the result of a process of negotiation.

If the payment term is not covered in the contract, you can refer to European Directive 2011/7/EU. This Directive was established to protect SMEs against late payment. Although in principle this Directive does not apply to companies outside the European Union, you can use these terms as covered in the Directive as a guideline:

- If no payment term is agreed to in the contract (or General Terms & Conditions), then 30 calendar days after receipt of the invoice.
- If the date of receipt of the invoice is not determined, then 30 calendar days after receipt of the goods and/or services.
- If the invoice is received before the goods and/or services, then 30 calendar days after receipt of the goods and/or services.
- If a verification or acceptance procedure is agreed to with regard to conformity, then 30 calendar days after the date this procedure is completed.
- A verification or acceptance procedure may not take longer than 30 calendar days.
- Payment terms in Europe that are set in a contract may not be longer than 60 calendar days unless otherwise expressly agreed.

Tips:

Carefully study the payment terms offered by your (potential) buyer, especially the number of days for delayed payment.

Always include the payment term in your negotiations about the price, as an advance payment can justify a lower price. On the other hand, a long credit period can justify a higher price.

Study [Directive 2011/7/EU](#) regarding payment terms and late payment regulations in case payment terms are not covered in the contract.

Delivery terms

Delivery terms depend on the type of distribution partner and respective preferences as to physical distribution. Importers will prefer FOB (Free On Board) or FCA (Free Carrier) arrangements. FOB is restricted to goods transported by sea or inland waterway. It means that the seller pays for transportation of the goods to the port of shipment, plus loading costs. The buyer pays the cost of marine freight transport, insurance, unloading and transportation from the arrival port to the final destination.

FCA can be used for any transportation mode. It means that the seller fulfils his obligation to deliver when he has handed over the goods, cleared for export, into the charge of the carrier designated by the buyer at the specified place or point.

Retail multiples can ask for CIF (Cost Insurance Freight). That means they will ask you to include the shipping and insurance charges in your quotation. Small retailers may go a step further and ask you to arrange for the goods to be delivered to their doorstep. The delivery terms for DDP (Delivered Duty Paid) may then be negotiated. For importers who consolidate orders in your country, Ex Works (EXW) terms are often best.

Details about the rights and obligations of the buyer and the seller under the respective terms can be found in the [Incoterms 2020](#).

Tip:

Study the rights and obligations of buyers and sellers for the different [Incoterms](#) and include these in your negotiations.

What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your vases is labour intensive, fair trade certification can give you a competitive advantage.

Common fair trade certifications are issued by

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#)

Tips:

Ask buyers what they are looking for. Especially in the fair trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Wooden vases: FSC certification

FSC (Forest Stewardship Council) certification is the most common label for sustainable wooden products, including vases. The FSC label guarantees that a product's source material comes from responsibly managed forests. These products are especially popular in Western European markets

Tip:

For more information, see the [three steps towards FSC certification](#).

Ceramic vases: Crystalline Silica

Respirable Crystalline Silica (RCS) can cause lung cancer through inhalation. The ceramics industry mostly uses crystalline silica in the form of quartz and cristobalite. Although European legislation cannot regulate working conditions in non-European countries, European buyers care about worker safety. They may demand good handling of crystalline silica during production.

Tip:

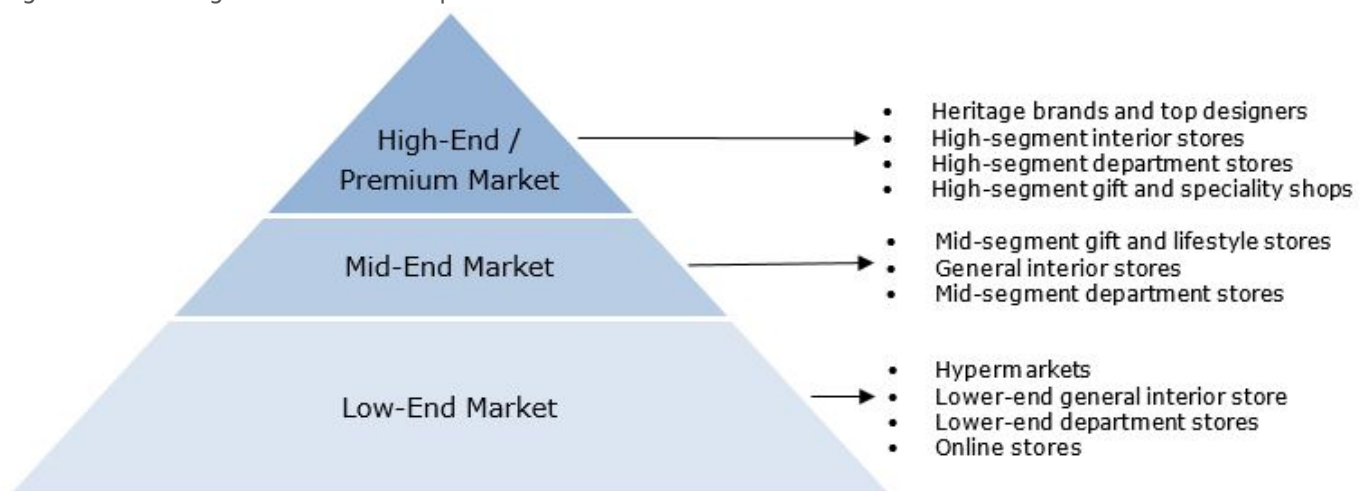
For more information in various languages, see the [European Network on Silica's Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products containing it](#), the [Good Practice Guide](#) and European national [Occupational Exposure Limits](#).

2. Through what channels can you get vases on the European market?

How is the end-market segmented?

The consumer market for vases consists of low-, mid- and high-end markets.

Figure 1: Vase segmentation in Europe



Low-end market

This segment contains everyday basics. These vases are:

- functional
- affordable
- often sold in sets
- easily available, for instance in hypermarkets, in general interior stores and online

Mid-end market

These products are trendy. Important characteristics are:

- design focused on texture or decoration (sometimes hand-painted)
- familiar shapes
- friendly prices
- sold at general interior stores and mid-segment department stores

In the mid-high market, design and craftsmanship are more prominent and innovative.

High-end/premium market

This is a very small segment, as the commercial market for vases usually ends at mid-high. The small luxury segment is characterised by:

- premium materials such as crystal or aluminium
- intricate techniques, often handmade
- innovative shapes
- distribution by heritage brands, top designers or high-end department stores.

This segment includes timeless ‘modern classics’ such as the [Aalto or Savoy Vase by Iittala](#) and the [Sottsass Vase by Bitossi Ceramiche](#).

Through what channels do vases end up on the end-market?

The channels through which vases are put on the market follow the traditional patterns: import takes place via importers/wholesalers that supply to retailers. Larger retail chains often bypass the importers/wholesalers and import themselves. Online platforms have become increasingly prominent. Below is an overview of the main actors in the market for vases.

Importers/wholesalers

Importers/wholesalers sell products to retailers in their own country or region, or re-export to the broader European continent. Some European markets are therefore supplied by wholesalers/importers from other European countries (internal European trade). These importers/wholesalers take care of the import procedures. They take ownership of the goods when they buy from an exporter (as opposed to agents), taking on the risk of the onward sale of the home decoration products. Developing a long-term relationship can lead to a high level of cooperation on appropriate designs for the market, new trends, use of materials, type of finishing and quality requirements.

Importing retailers

Some retailers, especially the larger chains, are increasingly importing directly from their suppliers in developing countries. Others, mainly the smaller independent stores, order in Europe from wholesalers. Retailers come in many sizes: large and part of a chain, or small and independent. There is a tendency for consolidation in European retail, with large retail brands becoming more widespread in Europe and more ‘lifestyle-centred’ (offering home decor and textiles as well as fashion accessories and furniture).

Tips:

To find potential buyers of your vases, search the list of exhibitors or visit the main trade fairs in Europe: [Ambiente](#) in Frankfurt, Germany (February), [Maison et Objet](#) in Paris, France (January and

September), [Tendence](#) in Frankfurt, Germany (August)

Search the list of members of [Cerame-Unie](#) (European Ceramic Industry Association), the association that represents the European Federation of Ceramic.

To help you enter the market, consider working with an agent or representative with a good reputation. You can look for commercial agents on the website of [Internationally United Commercial Agents and Brokers \(IUCAB\)](#).

The European retailer landscape for vases is segmented into speciality and gift shops, department and home decor stores, garden centres and do-it-yourself outlets, mass merchandise retailers (discount stores) and the internet. Mass merchandise retailers account for the largest share of the vase market.

Speciality and gift shops

Speciality shops (flower shops) and gift shops are smaller stores, which focus specifically on one niche, in this case products with a gift element or specific products such flowers.

Department and home decor stores

Department stores are large retail establishments that offer a wide variety of items such as clothes, electronics, toys, furniture and home decorations.

Garden centres and do-it-yourself outlets

A garden centre is a retail operation that sells indoor and outdoor plants and related products as their primary business. They often sell flowers, vases and other products related to home decoration as well. Do-it-yourself outlets, also known as hardware stores, mainly sell household hardware and home improvement products. Many of these outlets have speciality departments unique to their region or owner's interests. These departments include products related to gardening and interior design.

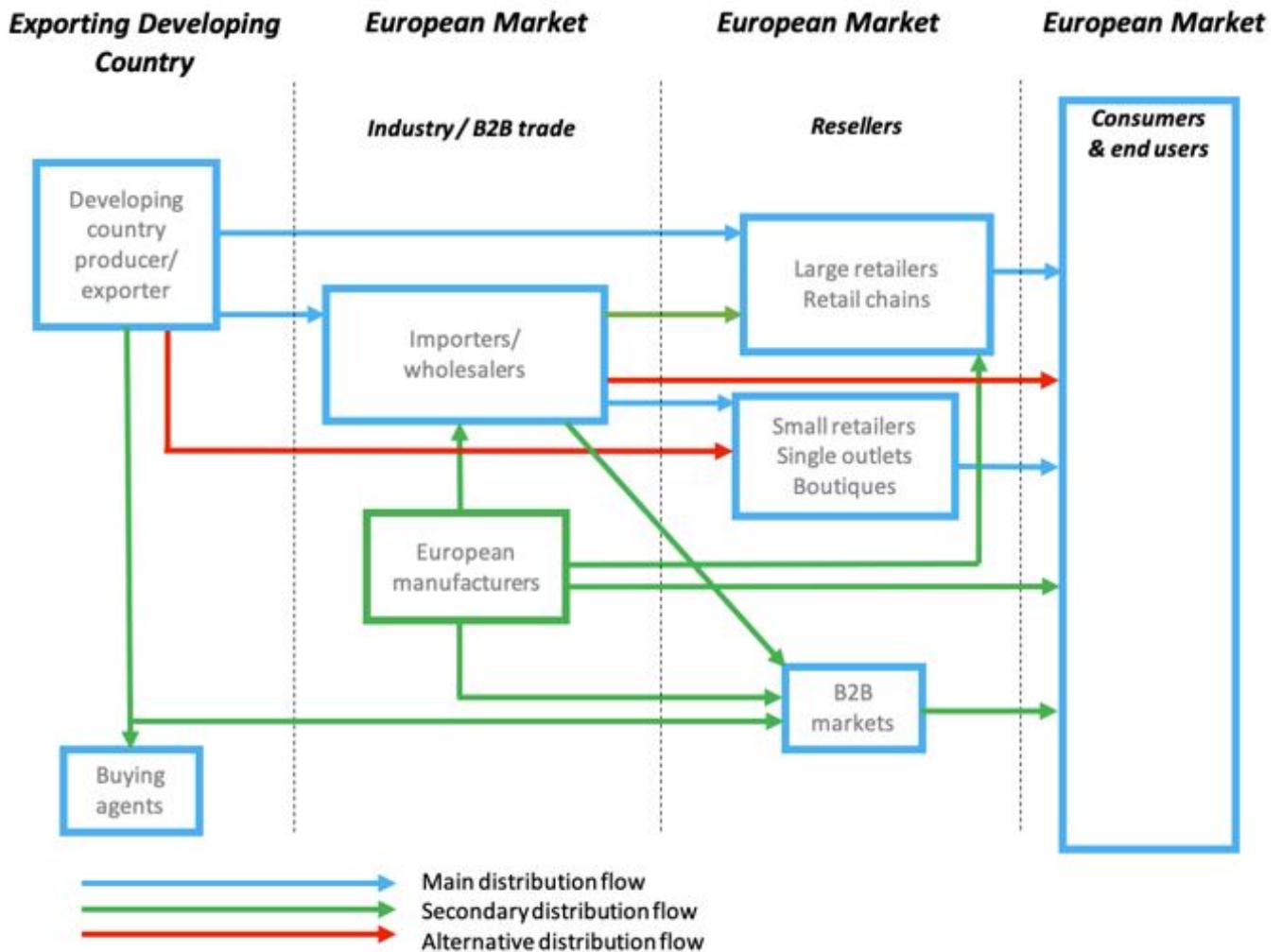
Hyper- and supermarkets

Mass merchandise retailers are companies that affordably sell large quantities of goods that appeal to a wide variety of consumers. They are not necessarily known for selling durable, high-quality products, but they do meet consumers' needs at reasonable prices.

Online

E-commerce in vases is increasing. Traditional retailers often combine online and offline channels, while niche players focus 100% on online channels.

Figure 2: Trade channels for vases in Europe



What is the most interesting channel for you?

Wholesale importers are the main channel between exporters in developing countries and European retailers. They are interesting if you want to develop a long-term relationship and they usually have good knowledge of the European market. They can provide you with valuable information and guidance on European market preferences.

However, as the market is becoming more and more competitive, large retailers are increasingly importing for themselves instead of through European wholesale importers. The obvious advantages include cutting out the margins of the wholesaler and reducing delivery time to the market. Because of this trend, the self-importing retailers might want to drive a much harder bargain with you.

Smaller, independent European retailers continue to purchase mainly from domestic wholesalers/importers. As in other European market sectors (such as food or clothing), independent retailers in home decor are struggling to compete with retail chains. They need to differentiate on value-added service, as well as specialised offers and authenticity.

These buyers typically prefer orders for small quantities of each item, small total order volumes and delivery to their doorstep, with a limited likelihood of repeat orders. You need to calculate whether such small orders are cost-effective for you.

The trend of direct sourcing is expected to continue in the future and may create more opportunities for you. The pool of buyers may increase if more retailers become importers, possibly resulting in an improvement of your bargaining position. Importing retailers order for their own shops and can therefore place orders much more quickly than importers/wholesalers, who first need to show samples to their retailers before exporters

receive their orders.

Tips:

Consider targeting retailers directly to improve your bargaining position and increase your chances of closing deals faster.

Communicate your offer and terms to the targeted retailer (large/small). Ask your existing buyers how they operate if you are unsure. The more informed you are about this aspect, the better you will be able to set prices.

Offer suitable services such as fast delivery and after-sales support to build a relationship based on mutual benefits.

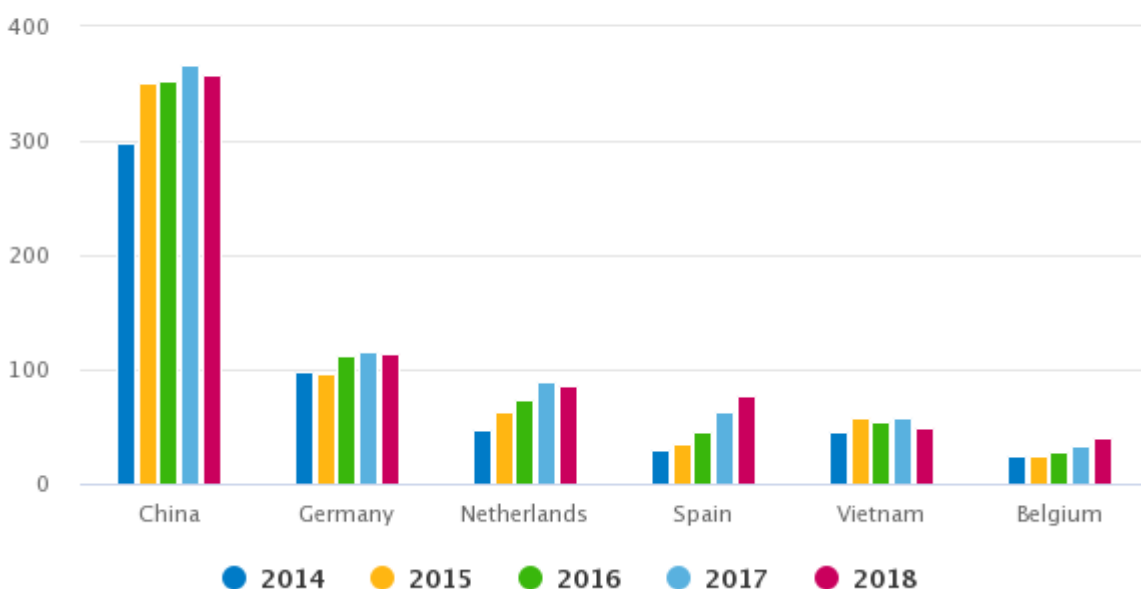
When you participate in international trade fairs, especially within Europe, make sure that you have a policy for small, independent retailers coming to your booth. If you choose to sell to them, you must have appropriate terms of trading (such as low minimum order quantities, delivery to the doorstep of the retailer and pre-stocking).

3. What competition do you face on the European vases market?

As seen in Figure 3, China is by far the main supplier of vases to Europe, followed by Germany. Smaller suppliers are the Netherlands, Spain, Vietnam and Belgium.

Figure 3: Leading suppliers of vases to Europe

in € million



Source: Trademap

Which countries are you competing with?

China is by far the main supplier of vases to Europe

China is Europe's main vase supplier. Almost one-third (33%) of the total vase imports to Europe are supplied by China. The total supply of vases grew from €299 million in 2014 to €358 million in 2018. The average growth

between 2014 and 2018 reached almost 5%.

China is a relatively cheap producer. Its low-cost workforce, availability of raw materials and efficient shipping to Europe compared to other (Asian) countries make China the most competitive supplier. Also, the Chinese are constantly improving their technology, which strengthens their position compared to their competitors. Chinese suppliers are well known for producing large volumes of vases. Product development and creativity are not their core strengths. To compete with Chinese suppliers, you should differentiate and move away from mass-produced vases. Focus more on products with high emotional value, sustainability and the story behind the product.

German exports hover around the €100 million mark

Second in line when it comes to suppliers of vases to Europe is Germany. The country is responsible for some 11% of the total imports of vases in Europe. The average growth rate per year is almost 5%.

German manufacturers benefit from proximity to the market and are able to offer short delivery times. However, the country's high-cost workforce makes production relatively expensive. Your material use, unique design and story behind the product can make the difference.

Steady growth of Dutch supply stagnated in 2018

The Dutch supply of vases showed an increasing trend between 2014 and 2017, after which it stabilised. The last five years (2014 - 2018) showed a strong average increase of 16%. The Netherlands is responsible for almost 8% of the total import value of vases to Europe, making it the third largest supplier.

The country's geographical location strengthens its position within the European Union. The Netherlands is an important hub for distribution operations in Europe. Part of the export of vases is therefore likely to be re-exported.

Exports from EU members Spain and Belgium on the rise

Although Spain is one of the smaller suppliers, the country showed the strongest growth of the six countries in the last five years. In 2014, Spain's total supply of vases to Europe was €29 million; in 2018 this increased to €78 million. This resulted in an average growth of almost 28% per year. Spain is responsible for 7% of the total imports of vases to Europe. Like Germany, Belgium and the Netherlands, Spain benefits from its proximity to the market and is able to offer short delivery times. However, the country's high-cost workforce makes production relatively expensive.

Although Belgium is the smallest player, it showed interesting growth in the last five years (2014-2018), with an average increase of 14%. The country is responsible for almost 4% of the total European imports of vases.

Exports from Vietnam fluctuate around €50 million

Vietnam is an interesting supplier from Asia with a 5% share of total imports of vases to Europe. However, its growth fluctuated between 2014 and 2018. Vietnam's exports to Europe peaked in 2015 and 2017 at €58 million. In 2018 the value amounted to €50 million. A strength of Vietnamese producers is their high productivity and ability to produce at a low cost, like the Chinese. They may also potentially benefit from the United States - China trade war. A weakness may be the lack of creativity and the ability to translate trends into new concepts and designs.

Which companies are you competing with?

Companies from China

Some examples of Chinese exporters of vases:

- [Shuangbei Glass](#) is a company specialised in producing glass vases. They have an in-house design team and can produce custom-made vases.
- [Fansia](#) is a Chinese company specialised in a wide range of glass products, including vases. The company has over ten years of experience exporting to Europe.
- [Fante Glassware Company](#) is another Chinese producer specialised in glassware. Besides the production of glass vases, they also manufacture products such as perfume bottles and teapots.

Companies from Vietnam

Some examples of a Vietnamese exporters:

- [Green Living](#) is a producer of vases, operating under its own brand name. These unique vases are handmade and produced with a natural and sustainable bamboo.
- [Artex Naman](#) is a company specialised in seagrass products. The eco-friendly vases are handcrafted and contribute to improving the lives of the Vietnamese craftsmen and the farmers supplying the seagrass.

Companies from Europe

Some examples of German exporters:

- [Nachtmann](#) is a manufacturer of crystal vases focused on the high-end segment, exporting to many countries in Europe and worldwide.
- [Meissen](#) is a manufacturer specialised in porcelain products. This manufacturer owns a mine where it sources the raw material for the porcelain. The decoration on the vases is hand-painted.

An example of a Spanish exporter:

- [Mediterranea Lifestyle](#) specialises in manufacturing products made of 100% recycled glass, including vases.

An example of a Belgian exporter:

- [House of Art](#) is a manufacturer of silver-plated, porcelain and crystal vases, with a focus on the high-end / premium market segment.

Which products are you competing with?

There are not really any alternative products that you will compete with. You will basically be competing with vases made from different materials – whether glass, ceramics or a natural fibre – and vases with different levels of quality and different designs. Increasingly, competition will come from vases with a sustainability concept. This can be based on the material, for example bamboo, or based on the production or recycling process. Consumers will select from options according to their specific preferences regarding sustainability, design and use.

4. What are the prices for vases on the European market?

Below is an overview of prices of vases in the low-, mid- and high-end market segments.

Table 1: Indicative consumer prices of vases

	Low-end	Mid-end	High-end
Vase: ceramic or glass, 25 cm	Up to €15	€15 to 50	€50 and over

Consumer prices depend on the materials used and the value perception of your product in a particular segment. Your marketing mix influences this:

- product benefits,

- promotion (brand or not, communication of product benefits),
- points of sale (reseller positioning),
- price

The following percentages give an indication of a price breakdown for vases in the supply chain:

- Shipping, import, handling costs: +25%
- Wholesaler: +100%
- Retail: +100-150%

A few examples of vase prices across Europe are the following:

- Floor vase, [Wayfair](#) (United Kingdom): €23
- Vase, [Bijzonder Mooi](#) (The Netherlands): €69.95
- Rough textured vase, [Zara Home](#) (The Netherlands): €29.99

Tips:

To determine your price, study consumer prices in your target segment and adjust your cost accordingly. Web shops like [Amazon](#) and [ZaraHome](#) can give you some direction.

Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.


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

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