MARKET STUDY

Homeware and Kitchenware | Spain

ÖNSÖZ

Türk Demir ve Demir Dışı Metaller sektörünün küresel ticarette rekabet gücünü artırmak ve yurt dışı pazar ağını genişletmek amacıyla yürüttüğümüz çalışmaların bir parçası olarak hazırlanan “Ev ve Mutfak Eşyaları Sektörü İspanya Pazar Araştırması” raporunun, sektör ihracatçılarımız için stratejik bir referans kaynağı niteliği taşıdığına inanıyorum.

Günümüz ticaret dinamiklerinde uluslararası pazarlara etkin biçimde nüfuz edebilmek, yalnızca fiyat ve kalite dengesine sahip olmaya değil, aynı zamanda hedef pazarların doğru analiz edilmesi ve pazar yapısının ve işleyişinin iyi anlaşılmasına bağlıdır. Bu rapor, İspanya pazarında Ev ve Mutfak Eşyaları sektörüne ilişkin rekabet analizi, dağıtım kanalları, mevzuat çerçevesi ve pazardaki temel fırsatlar ve zorluklar gibi kritik başlıkları kapsamlı bir şekilde ele almaktadır.

Gelişmiş perakende yapısı ve güçlü tüketici profiliyle İspanya; Türk Ev ve Mutfak Eşyaları sektörü için önemli fırsatlar sunmakla birlikte pazara özgü stratejik bir yaklaşım gerektirmektedir. Bu kapsamda raporun, ihracatçılarımız için hem yol gösterici bir kaynak hem de yeni iş birliklerine kapı açacak bir rehber niteliğinde olacağına inanıyorum.

T.C. Ticaret Bakanlığı’nın destekleriyle hazırlanan bu raporun oluşum sürecine değerli katkılar sunan Ev ve Mutfak Eşyaları Sanayicileri ve İhracatçıları Derneği (EVSİD) ve Globrand Strateji ve Danışmanlık’a teşekkür eder, sektörümüzün büyümesi ve ihracatçılarımızın küresel pazarlarda daha güçlü bir konuma ulaşması için çalışmalarımıza devam edeceğimizi ifade ederim.

Çetin TECDELİOĞU
İstanbul Demir ve Demir Dışı Metaller İhracatçıları Birliği
Yönetim Kurulu Başkanı

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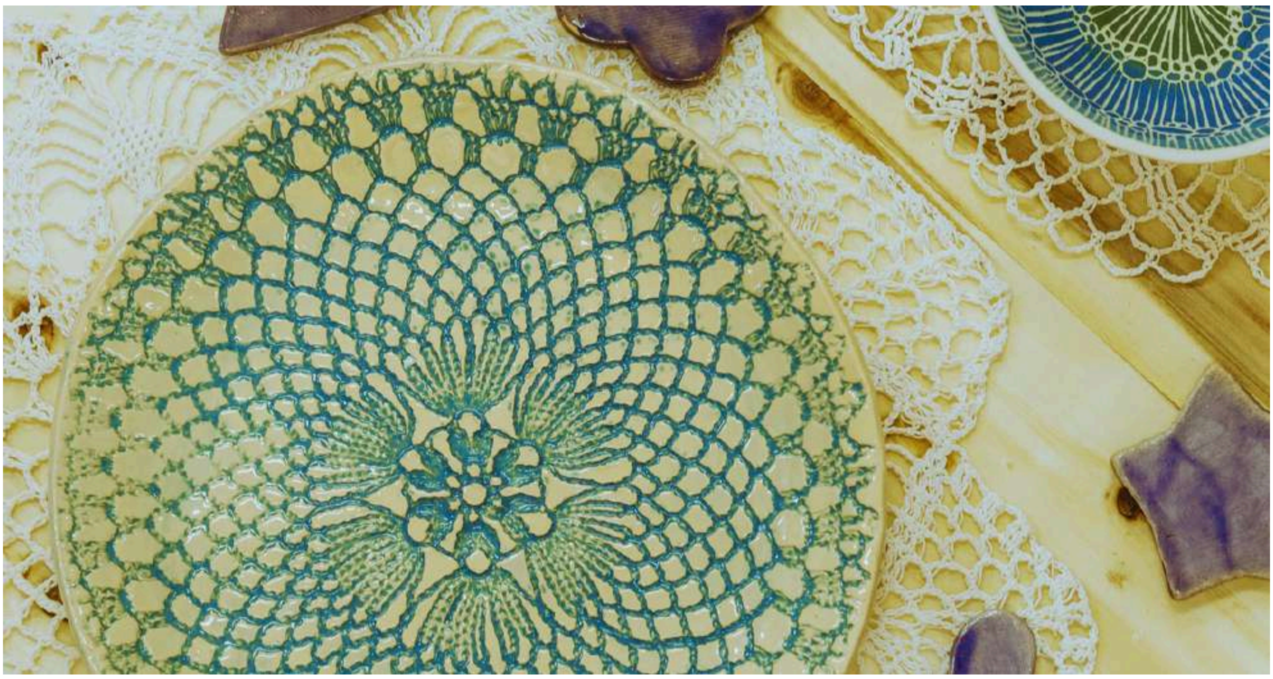

01. INTRODUCTION

01. INTRODUCTION

This report presents a comprehensive market study of the **homeware and kitchenware sector in Spain**, prepared for the **Istanbul Ferrous and Non Ferrous Metals Exporters Association (Turkish Metal Exporters)**. The primary objective of this study is to provide detailed, evidence-based insights into the structure, dynamics, and opportunities within the **Spanish market**. With a particular focus on strategic opportunities for Turkish exporters, the report serves as a practical tool for market entry and expansion planning.

The study encompasses an in-depth analysis of market size and growth, drawing on both historical data and forward-looking projections to highlight key developments and emerging patterns in consumer demand. It further includes a detailed segmentation of the product categories within the sector—**spanning kitchenware, dining items, bathroom accessories, and selected household appliances**—providing a clear picture of how each category contributes to the overall market landscape.

In addition, the report explores the **key market drivers**, including shifting consumer preferences toward sustainability, innovation, and multifunctional products, as well as behavioral insights that influence purchasing decisions. The analysis also takes into account post-pandemic lifestyle changes, urbanization trends, and the rise of online retail as pivotal forces reshaping the competitive environment.

Furthermore, the report outlines the **primary distribution channels in Spain**, complemented by a **store check analysis**, and identifies major stakeholders such as leading importers, retailers, and relevant industry associations.

A detailed **SWOT analysis, regulatory overview, and an assessment of key certifications and technical standards** provide critical context for international businesses seeking compliance and long-term positioning. Overall, this market study delivers actionable intelligence for stakeholders aiming to compete effectively in one of Europe's most dynamic and evolving homeware and kitchenware markets.

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MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

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2.1. Market Size & Growth

In 2024, the global houseware market was valued at **USD 343 billion**, reflecting a 3.3% increase from 2023, when it stood at **USD 332 billion**. For comparison, in 2019, the market was worth USD 298 billion, with a compound annual growth rate (CAGR) of **2.7%** between 2019 and 2023. Looking ahead, the market is projected to grow at a CAGR of **4.1%** from 2024 to 2034, reaching an estimated value of **USD 513 billion by 2034**. Therefore, the worldwide houseware market is showing a **positive growth trend**, that appears to be accelerating over time.

The recent growth of the **houseware sector** can be largely attributed to changes in consumer behavior triggered by the **COVID-19 pandemic**. As people were confined to their homes, there was a notable shift in priorities, with increased attention given to **home improvement, organization, and practical upgrades.** This drove demand for houseware products starting in 2020. Another key growth driver is the **rise in residential construction**, including **smart homes and modular homes**, which often integrate houseware solutions into their designs. These trends have further fueled demand for **functional, space-efficient, and technologically advanced products.**

Today, manufacturers are increasingly responding to consumer preferences for **sustainability, innovation, and convenience.** Products that **save time and space**, and that reflect **environmental concerns**, are becoming more prominent in the market.

Within this broader trend, **kitchenware has emerged as the most sought-after segment since the pandemic**, driven by a rise in **home cooking habits**. Demand is also growing for houseware in other areas of the home, particularly **living rooms and bathrooms.**

Source: Future Market Insights

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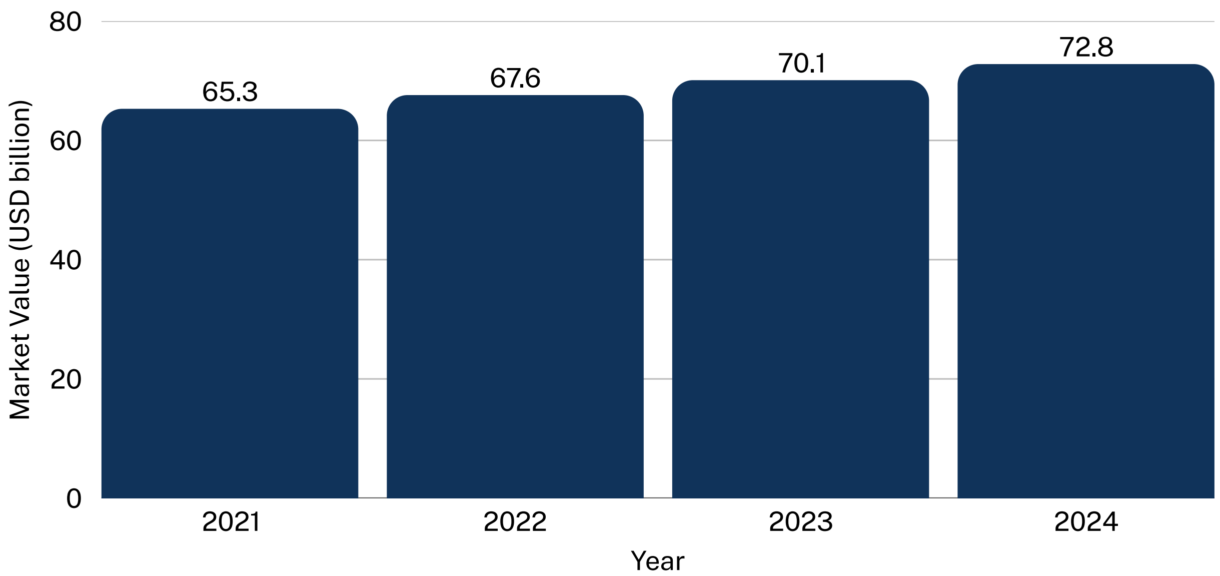
In terms of distribution, **physical retail stores**, especially **supermarkets**, remain the **most preferred purchasing channel** for houseware products globally.

On the other hand, the **global kitchenware market** - typically considered a subset of the broader houseware sector - was **valued at USD 72.8 billion in 2024**, reflecting an increase from 2023, when it stood at **USD 70.1 billion**. It is projected to reach **USD 109.7 billion by 2034**, with a **compound annual growth rate (CAGR) of 4.2%** between 2025 and 2034. Similar to the overall houseware market, the **kitchenware segment is also demonstrating a strong and consistent growth trend.**

According to Global Market Insights, the kitchenware market reached **$72.8 billion in 2024**, led by the **cookware segment.** This marks a rise from 2021–2023 levels, with steady growth expected through 2034.

Graph 1 - Global Kitchenware Market Size by Segment, between 2021 and 2024



Source: Global Market Insights

Source: Future Market Insights | Global Market Insights

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2.1. Market Size & Growth

As mentioned above, the main driver behind the growth of the **kitchenware sector** is the **rise in home cooking and increased culinary interest**, particularly following the **COVID-19 pandemic**, which encouraged consumers to invest in high-quality kitchen tools. Another key factor is the shift toward **healthier lifestyles**, motivating people to prepare nutritious meals at home. Kitchenware also shares broader houseware market drivers, such as **urbanization and changing lifestyles**, which have increased demand for **multifunctional, space-saving products**. **Technological advancements -** like app-controlled appliances - and growing preference for **sustainable, eco-friendly materials** are also shaping consumer choices.

2.1.1. Market size of the kitchenware and houseware industry in Spain

For the present study, the Spanish market will include **three main categories:** Homewares (dining and kitchen), Bathroom Accessories and Household appliances (ironing boards).
While **ironing boards** are relevant to the broader context, they are excluded from the houseware category - similar to **bathroom accessories** - due to the lack of disaggregated data. However, unlike bathroom accessories, which are not classified under any major adjacent category, ironing boards are typically grouped under **household appliances** - which will also be analysed.

1. Homeware market

Starting with the homeware market in Spain, in 2024, it was valued at approximately €1 436.6 million (around USD 1.631,40 million*). The two main categories of the homeware market are **kitchen and dining**. Kitchenware led the sector with **$913.02 million*** (804.1 million €) in retail sales, slightly outperforming dining (**$718.38 million***) (632.6 million €) in 2024. However, neither segment posted significant growth.

Source: Global Market Insights | *Euromonitor* | Grand View Research

*Conversion carried out on May 27, 2025, at an exchange rate of 1 EUR = 1,14 USD.

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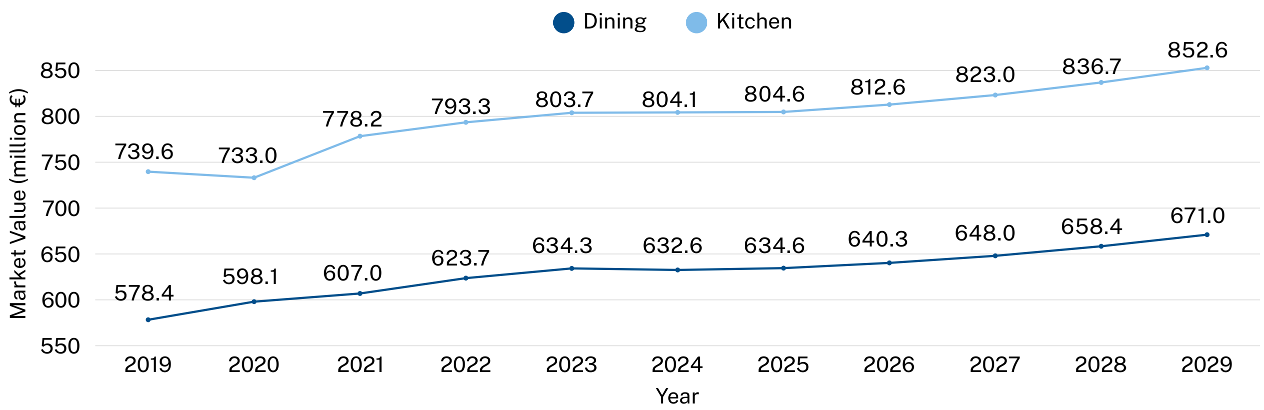
Both of these segments are expected to grow by **1.2%** (CAGR) from 2024 to 2029. On the other hand, the **historical growth in the dining category** between 2019 and 2024 was **1.8%** (CAGR). A similar trend is observed in the **kitchen category**, which recorded a CAGR of **1.7%** over the same period, also exceeding the forecasted rate of 1.2%. This evolution, from 2019 to 2029, is illustrated in Graph 2.

Graph 2 - Dining and Kitchen Markets Size in Spain: Historical Data up to 2024 and Projections through 2029



Source: *Euromonitor*

As shown in Graph 2, the **kitchen category consistently outperforms dining** in terms of market value, probably positioning it as the leading segment within the houseware market.

Graph 3, by contrast, merges the dining and kitchen markets into a single category and presents their breakdown **by material** type. It analyses the historical market share of each material from 2019 through to 2024.

In 2024, **metal products dominated the market**, accounting for approximately **one-third** of the total share. They were **followed by glass**, **ceramic**, and **plastic** products, respectively, each holding similar proportions. The **remaining materials** - silicone, wooden, and others - **represented only a marginal share**, collectively amounting to less than 3% of the market.

Source: Euromonitor

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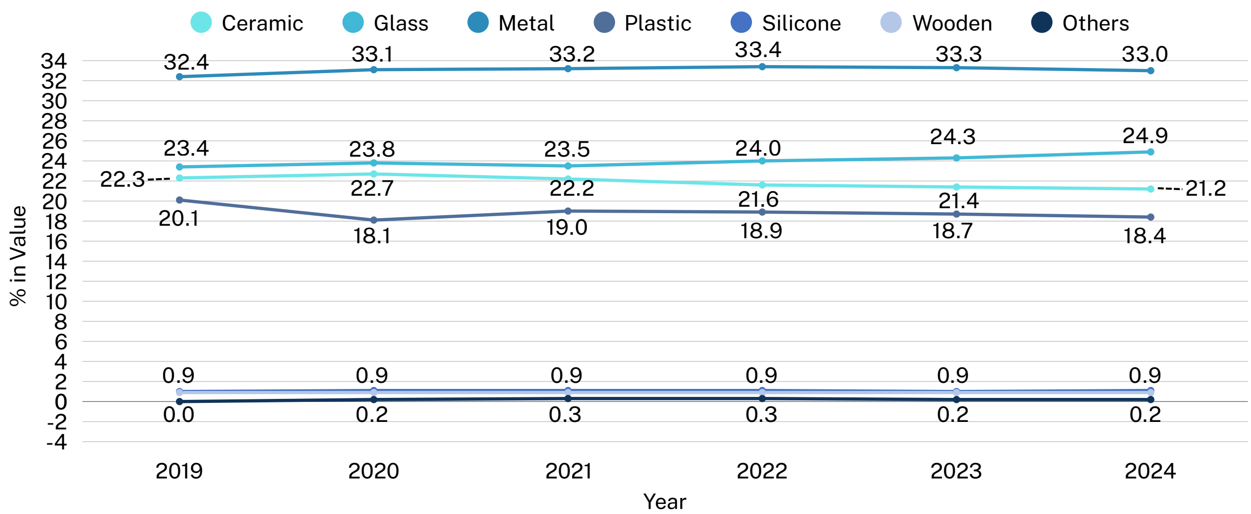
2.1. Market Size & Growth

Graph 3 - Dining and Kitchen Markets by Material, in %, between 2019 and 2024



Source: Euromonitor

The **ranking of materials remained consistent over time**, with **metal products maintaining their leading position** throughout the period. Overall, the relative market shares of the different materials were stable, showing only **minor fluctuations**. The most notable shift was a **2-percentage-point decline in plastic products** from 2019 to 2024, which primarily contributed to a **corresponding increase in the share of glass products.** This evolution in material shares reflects broader shifts in consumer preferences in Spain's dining and kitchen segments.

Similar to global trends, there is growing demand for **simple and convenient products**. In these categories, for example, the **increased preference for glass** - evident in the rise of its market share - can be **attributed to its aesthetic appeal**, particularly in beverageware. At the same time, the decline in plastic use aligns with **sustainability concerns.** The growing popularity of home entertaining is also driving demand for more **stylish and visually appealing** dinnerware and beverageware. In addition, **online shopping** for kitchen products is becoming increasingly popular, with platforms such as Amazon and IKEA's e-commerce site experiencing growing consumer engagement.

Source: Euromonitor

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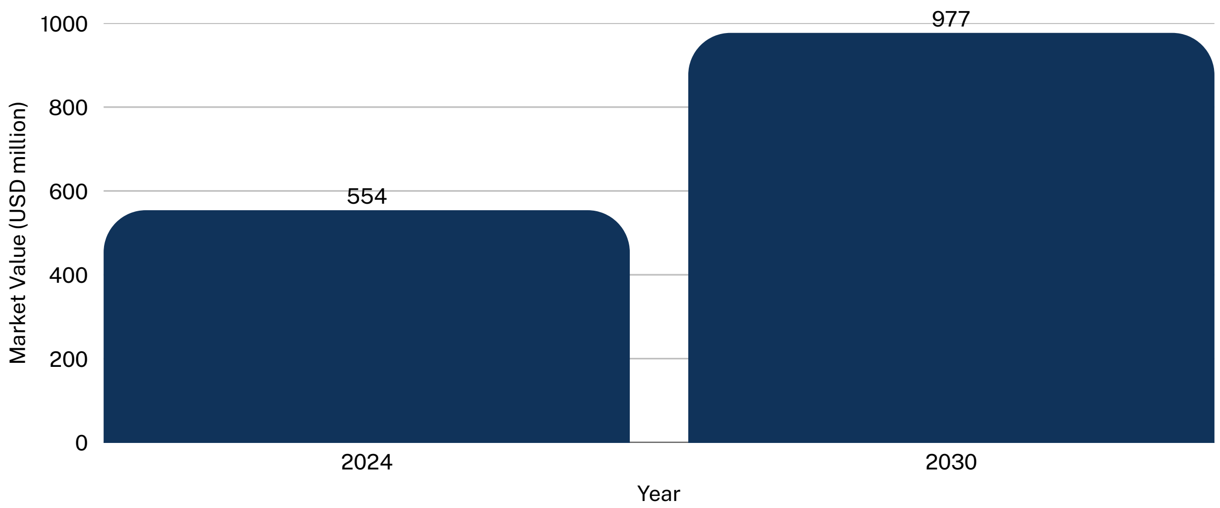
2.1. Market Size & Growth

2. Bathroom Accessories

In 2024, the **bathroom accessories market** — including towel racks and rings, hooks, paper holders, grab bars, and other related items — was valued at approximately €492 million* (around **USD 554 million**). By 2030, it is projected to reach €867 million* (**USD 977 million**), reflecting a compound annual growth rate (CAGR) of **10%** between 2025 and 2030. This suggests that, over a five-year horizon, the bathroom accessories category is **likely to experience the highest growth among all segments**.

The growth of this market is being driven by the **rise in residential construction** across Spain, with consumers increasingly seeking **minimalist and affordable designs** that maintain a strong sense of style. **Sustainability** has also become a key consideration in purchasing decisions. In addition, there is a growing demand for **convenient and accessible products**, as reflected in the rising popularity of grab bars - highlighting a greater **focus on safety and inclusivity**, particularly for the elderly and individuals with mobility challenges.

Graph 4 - Bathroom accessories market value for 2024 and 2030 (USD million)



Source: Grand View Research

Source: Euromonitor | Grand View Research | c6Wresearch | Statista - 1 | 2

*Conversion carried out on May 20, 2025, at an exchange rate of 1 EUR = 1,13 USD.

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2.1. Market Size & Growth

2. Bathroom Accessories

On a European scale, where Spain is part of a broader regional trend, the bathroom accessories market is shaped by a **range of macroeconomic and consumer-driven factors** beyond what's seen at a national level:

1. **Residential construction and renovation booms**, particularly as urbanization increases.
2. **Higher disposable incomes**, enabling consumers to invest in home upgrades.
3. **Limited home space,** pushing demand for compact, multifunctional, and aesthetically pleasing accessories.
4. **A rising lifestyle standard**, with greater emphasis on modern, comfortable, and stylish living environments.

Aditionally, the **COVID-19 pandemic** temporarily disrupted the European bathroom accessories market, including in Spain. During the peak of the crisis, construction activity slowed significantly, raw material prices, particularly metals, fell, and revenue across the bath fittings sector declined. This period of contraction **affected supply chains** and delayed renovation and construction projects across the region. However, the market has since shown **strong signs of recovery**. In recent years, construction activity across the European Union has resumed at a robust pace, contributing to the **revitalization and ongoing growth of the bathroom accessories industry**.

Besides sustainable options, **technological innovation** is also becoming a key differentiator in the market. **Smart bathroom solutions,** such as touchless faucets, automated lighting, and intelligent water systems, are gaining popularity, reflecting a shift toward hygiene, convenience, and connected living.

Source: Euromonitor | Grand View Research | c6Wresearch | Statista - 1 | 2

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2.1. Market Size & Growth

3. Household Aplliances (ironing boards)

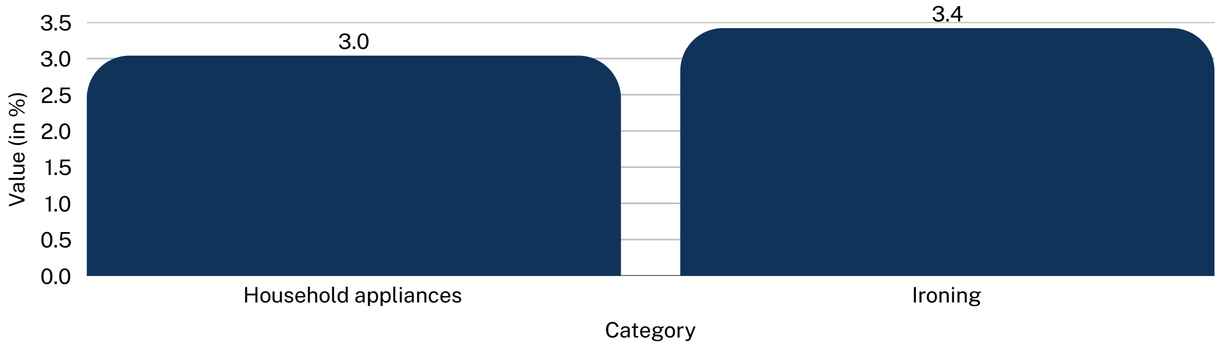
The ironing board market in Spain represents a **niche yet growing segment** within the broader household appliances sector. Though typically categorized under housewares or small domestic equipment, ironing boards are increasingly aligned with the **functional and lifestyle-driven evolution** of the household appliances industry. This alignment is reinforced by consumer expectations for **convenience, design integration, and utility**.

According to Statista, the Spanish household appliances market is expected to generate over €5.36 billion (about **$6.09 billion***) in 2025, with forecasts indicating stable growth – a CAGR of 3.04% between 2025 and 2030 - driven by rising disposable incomes, urbanization, and a focus on home efficiency and aesthetics.

In this context, ironing boards are no longer seen merely as utilitarian tools, but rather as **integral components of modern home care ecosystems,** often bundled with **irons, steamers, or smart home laundry solutions**.

While specific figures for ironing boards are limited, the adjacent market for irons in Spain is expected to generate €72.35 million (**$82.16 million***) in 2025, with a projected CAGR of **3.42% from 2025 to 2030**. Given the complementary relationship between irons and ironing boards, it is reasonable to expect a mirrored or proportionally linked growth trajectory in ironing boards.

Graph 5 - Expected CAGR of household appliances and ironing from 2025 to 2030 (%)



Source: Grand View Research

Source: Euromonitor | Grand View Research | c6Wresearch | Statista - 1 | 2

*Conversion carried out on May 27, 2025, at an exchange rate of 1 EUR = 1,14 USD.

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At the European level, the ironing board market accounts for a **significant global share**, indicating a strong cultural and functional demand in the region. Spain, as part of this trend, benefits from similar lifestyle patterns and household behaviours that support sustained interest in ironing products.

Similar to other categories in the houseware market, ironing boards are shaped by evolving trends in **interior design** and **shifting consumer preferences**. **Urbanization** has increased the need for compact and efficient household solutions, while the growing focus on **home organization** boosts demand for practical, space-saving accessories. The **hospitality sector**, including hotels and laundries, also contributes significantly to market demand by requiring durable and efficient ironing solutions.

Globally, consumers tend to prefer **freestanding ironing boards** due to their **flexibility and ease of use**. However, **wall-mounted models are gaining popularity**, especially in smaller homes, thanks to their **space-saving** benefits. Tabletop ironing boards are also favored for quick and convenient use, reflecting a market shift towards **multifunctional and space-efficient household products**.

Source: Euromonitor | Grand View Research | c6Wresearch | Statista - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

In conclusion, the houseware sector is experiencing **steady and increasingly robust growth** both globally and within Spain, driven primarily by evolving consumer habits, technological innovation, and macroeconomic factors such as urbanization and increased disposable income.

1. **Homewares (Kitchen and Dining):** This is the largest and most mature category, particularly boosted by the pandemic-induced shift toward home cooking and entertaining. Kitchenware, especially, has maintained its dominance over dining items and is expected to continue growing due to sustained interest in multifunctional, space-saving, and aesthetically appealing products.

2. **Bathroom Accessories:** Though less prominently tracked than kitchenware, this segment is showing a resilient recovery post-COVID, bolstered by increased construction and renovation activity. Key growth drivers include demand for modern, compact, and tech-integrated solutions such as smart fixtures.

3. **Household Appliances (Ironing Boards):** While niche, this segment aligns closely with broader trends in home efficiency and urban living. Ironing boards are no longer viewed merely as utility items but as part of a stylish and space-optimized home ecosystem. Their growth mirrors that of small appliances like irons, and interest is supported by sectors such as hospitality.

The houseware sector, across its key categories, is transitioning from purely functional products to **lifestyle-enhancing solutions**. Growth across all segments is expected to continue, with consumer preferences increasingly favoring **sustainability, digital integration, and aesthetic value**. This signals strong market potential for businesses able to innovate along these lines.

Source: Euromonitor | Grand View Research | c6Wresearch | Statista - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

2.1.1.1 HS Code Classification and Trade Analysis of Kitchenware and Houseware Products

To complement the previously presented analysis, a detailed examination by tariff code is presented below, focusing on the **relevant categories of kitchenware and houseware.** This analysis will provide a clearer understanding of the evolution of Spain's import needs - and, therefore, the market potential - as well as identify the main trade partners and Turkey's role in this context.

The table below presents, therefore, the main categories and products analysed.

Table 1 - Key HS Codes for Analyzing the Spanish Market*

Category	HS Codes
Plastic Kitchenware & Houseware	392410, 392490
Ceramic Kitchenware & Houseware	691110, 691190, 691200
Glass Kitchenware & Houseware	701310, 701322, 701328, 701333, 701337, 701341, 701342, 701349
Metal Kitchenware & Houseware	732111, 732112, 732119, 732391, 732392, 732393, 732394, 732399, 741810, 761510, 821000, 821110, 821191, 821192, 821510, 821520, 821591, 821599
Small Electric Kitchen and House Appliances	850940, 850980, 851640, 851660, 851671, 851672, 851679
Wood Kitchenware & Houseware	4419

**All codes presented were previously validated and chosen for the analysis of the present study.*

In 2024, Spain's **imports** for the relevant HS codes totaled approximately **USD 2.13 billion**, while **exports** amounted to around **USD 1.88 billion**. This resulted in a **trade deficit of approximately USD 250 million** within these product categories.

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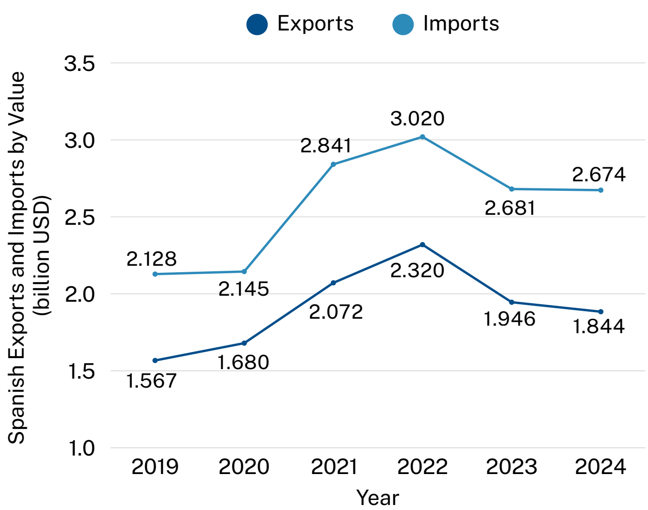
2.1. Market Size & Growth

Spain's primary import partners were **China, Germany, France, Italy and Turkey**, while on the export side key destinations included **Germany, Portugal, France, Italy and the United Kingdom**. Imports from Turkey represented almost 6% of Spain's total imports, placing **Turkey 5th among the country's import partners**.

In recent years, both imports and exports have followed similar value trends, **peaking in 2022 before declining by 2024** (Graph 6). The 2022 peak may be attributed to the inflationary surge during that period (2022). Despite the subsequent drop in 2023 imports increased at an average annual rate of **4.67%** between 2019 and 2024, while exports experienced a lower annual growth of **3.75%**, indicating that Spain's trade deficit may widen.

Graph 6 - Spain's International Trade Overview by Value in USD in the key HS Codes



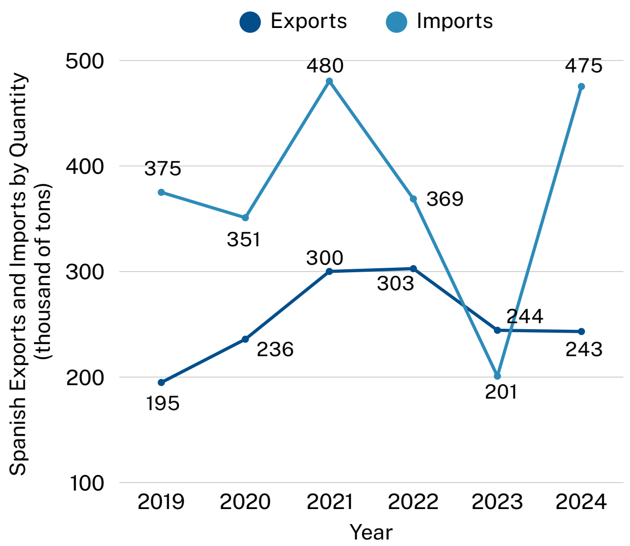
Source: Trade Map

Graph 6 reinforces the previous assumption about the reasons behind the 2022 peaks. The data reveals that while the value of exports and imports was rising, the quantities either decreased or remained stable.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Graph 7 - Spain's International Trade Overview by Quantity in tons in the key HS Codes



Source: Trade Map

Similarly, the **sharp decline** in the quantity of exports in 2023 (Graph 7) contrasts with the **relatively stable value of exports** (Graph 6). This discrepancy suggests that while fewer goods were exported, the value per unit may have increased, possibly due to higher prices as mentioned before or due to a **shift towards exporting higher-value items.**

The export volume shows minor fluctuations, indicating greater stability.

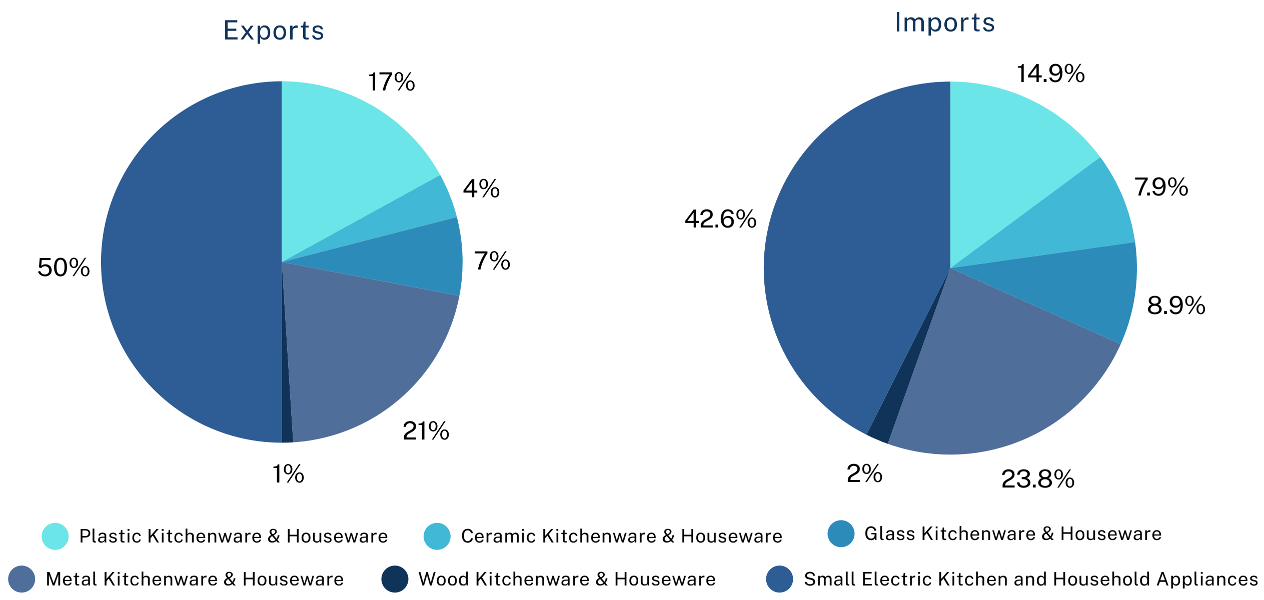
To better understand the underlying drivers of these figures, it is essential to conduct a **disaggregated analysis of the relevant HS codes**, as presented below. Firstly, the relevant HS codes already classified by material were grouped accordingly into the following categories:

Taking this analysis into account, the category with the highest import value in 2024 was **Small Electric Kitchen and Household Appliances**. This was followed by Metals, Plastics, Glass, Ceramics, and finally, Wood Kitchen and Houseware. On the export side, the ranking was identical. These figures are illustrated in Graph 8.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Graph 8 - Exports and Imports by Category in 2024



Source: TradeMap

From a more detailed and product-specific standpoint, it is essential to examine each relevant HS Code individually in order to evaluate its significance within the Spanish market, as well as its role and performance in the **broader context of international trade**. This analysis enables a clearer understanding of trade flows, demand patterns, and the competitive positioning of each product category.

The following section presents a series of graphs that illustrate the **import and export volumes associated with each HS Code over recent years**. These visualizations are intended to highlight trends, identify key trading partners, and provide insight into the evolution of market demand, thereby offering valuable guidance for Turkish exporters seeking to align their product offerings with **market opportunities in Spain**.

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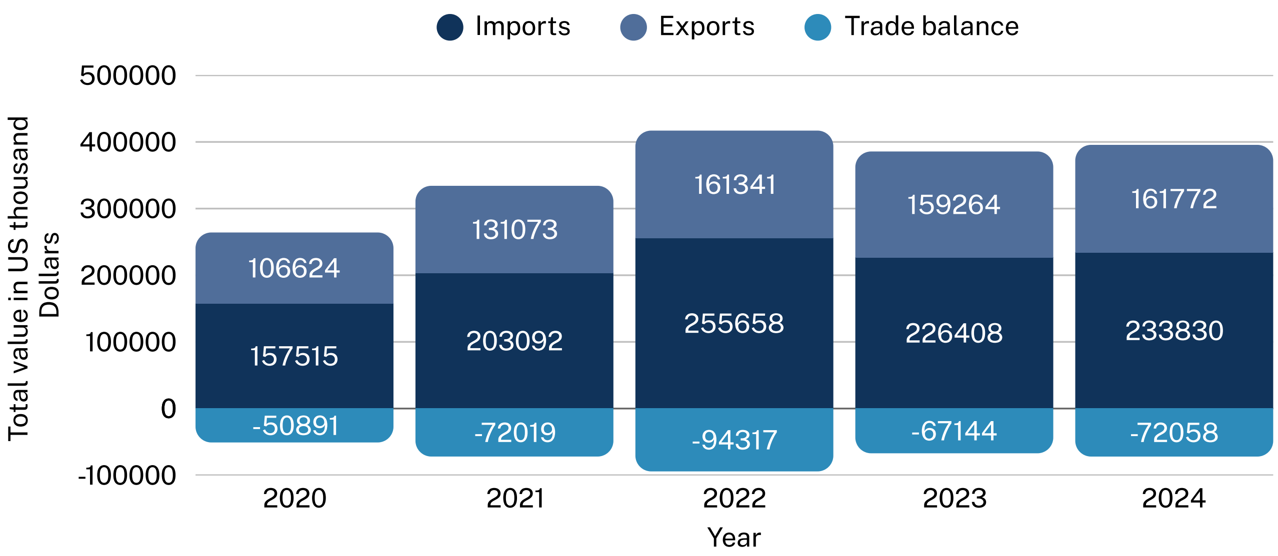
2.1. Market Size & Growth

Category: Plastic Kitchenware & Houseware

Total value of imports (2024) - 409 822 000$

- **HS 392410 | Tableware and kitchenware, of plastics**

Graph 9 - Exports, Imports and Trade balance of the HS Code 392410 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

As illustrated in Graph 9, the trade performance of **HS Code 392410 in Spain between 2020 and 2024** reveals a **pattern of fluctuation in both import and export values**, ultimately affecting the trade balance over the period. The year 2020 marks the lowest point in trade activity, largely attributable to the global disruption caused by the **COVID-19 pandemic**, which significantly impacted international supply chains and consumer demand.

In contrast, **2022 emerges as a year of notable recovery and growth**, with imports reaching 255 658 000$, the highest value recorded during the period, while exports also showed improvement, second only to those recorded in 2024. It is important to note that HS Code 392410 consistently registers a **trade deficit** for Spain, as imports substantially outweigh exports. This indicates a **strong reliance on foreign suppliers** to meet domestic market needs for these products.

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2.1. Market Size & Growth

Table 2 - Spain's main importing and exporting countries for HS code 392410 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	103 275	77 988	91 780
2. Italy	28 395	26 381	26 588
3. Netherands	16 075	26 999	25 675
4. France	20 718	20 911	17 841
5. Germany	15 463	17 287	15 444
7. Turkey	21 215 (8.3%)	13 831 (6.1%)	11 009 (4.7%)

Source: TradeMap

As shown in the previous table, **China** is by far the **leading supplier of HS Code 392410 products to Spain**, with imports totaling 91 780 000$ in 2024. This dominant position underscores China's significant role in meeting Spanish demand for plastic tableware, kitchenware, and similar household articles.

Turkey ranks **seventh** among Spain's import sources for this product category, reflecting a moderate but noteworthy presence in the Spanish market. While not among the top-tier suppliers, Turkey's position indicates an **established trade relationship and room for growth**. The current import levels suggest opportunities for Turkish exporters to expand their footprint and compete more strongly with leading suppliers such as **China, Netherlands, and Italy**.

Source: TradeMap - 1 | 2

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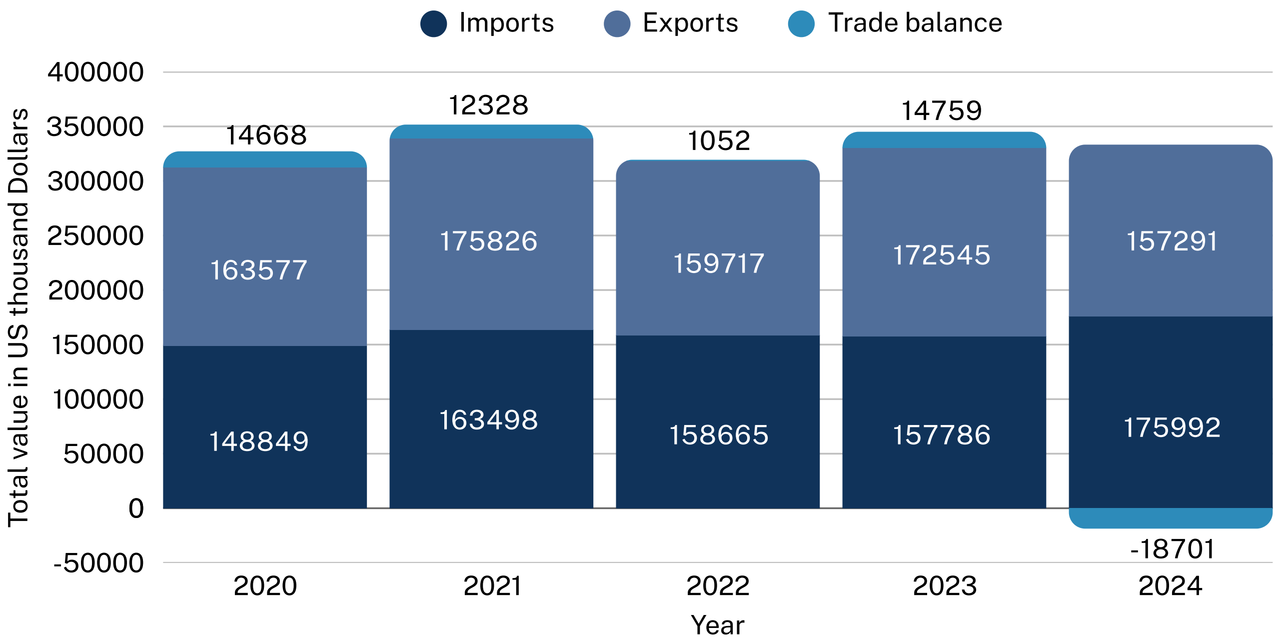
2.1. Market Size & Growth

- **HS 392490 | Household articles and toilet articles, of plastics (excl. tableware, kitchenware, baths, shower-baths, washbasins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware)**

Graph 10 - Exports, Imports and Trade balance of the HS Code 392490 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

An analysis of Graph 10 reveals that the trade performance of **HS Code 392490** experienced **fluctuations between 2020 and 2024**.
While Spain maintained a positive trade balance throughout most of the period, **2024 marked a shift with a trade deficit** of 18 701 000$. **Imports showed a steady upward trend** from 2022 to 2024, reaching 175 992 000$ in the most recent year. Conversely, **exports declined** during the same period, totaling 157 291 000$ in 2024.

This reversal in trade balance reflects a growing domestic demand met increasingly through foreign suppliers, while Spain's export performance in this category has weakened. For Turkish exporters, this trend highlights a **growing opportunity to strengthen their presence in the Spanish market** by responding to the **rising import demand** with competitive and high-quality offerings.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 3 - Spain's main importing and exporting countries for HS code 392490 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	63 797	58 378	67 923
2. Italy	30 312	28 420	24 168
3. Germany	9 075	10 786	9 770
4. Greece	4 632	5 127	8 165
5. France	7 242	8 328	8 026
7. Turkey	5 712 (3.6%)	6 997 (4.4%)	6 986 (4%)

Source: TradeMap

For **HS Code 392490**, Spain continues to show a strong reliance on imports to meet domestic demand. In 2024, **China** remained the dominant supplier, accounting for 67 923 000$ worth of imports, far surpassing all other countries. Italy follows at a distant second, with imports valued at 24 168 000$, while **Turkey** ranks seventh, exporting **6 986 000$** worth of goods to Spain in this category.

This distribution highlights the **significant concentration** of imports from a few top suppliers, particularly China, while also pointing to Turkey's established, though modest, presence in the Spanish market. Despite ranking seventh, Turkey's current share indicates **potential for growth**.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

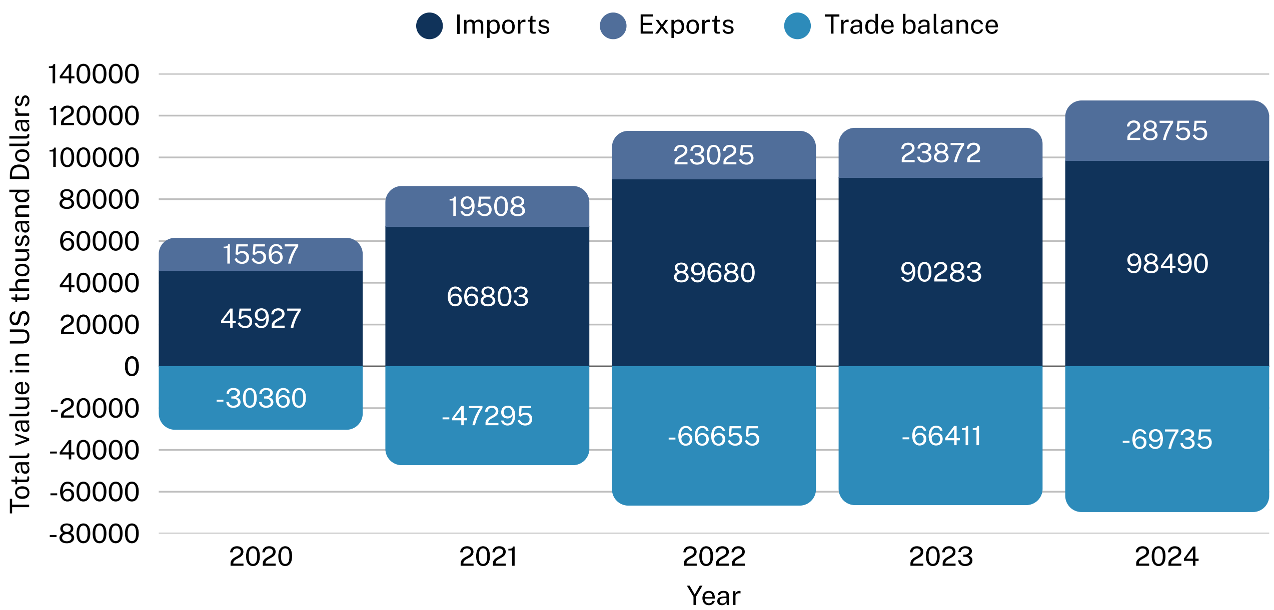
2.1. Market Size & Growth

Category: Ceramic Kitchenware & Houseware

Total value of imports (2024) - 202 528 000$

- **HS 691110 | Tableware and kitchenware, of porcelain or china (excl. ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packing of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)**

Graph 11 - Exports, Imports and Trade balance of the HS Code 691110 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

The international trade data for **HS Code 691110** demonstrates a consistent increase in activity between 2020 and 2024, despite a slight decline in 2023. Nevertheless, the figures for 2023 remained substantially higher than those recorded in 2020 and 2021, indicating **sustained market expansion over the period.**

In 2024, imports in this category reached approximately 98 490 000$, while exports amounted to 28 755 000$, yet **the trade balance stayed negative.** This trend signals a growing, import-reliant market and a strategic opportunity for global suppliers in Spain's ceramic tableware sector.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 4 - Spain's main importing and exporting countries for HS code 691110 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	24 810	21 206	25 714
2. Turkey	12 482 (13.9%)	12 195 (13.5%)	12 354 (12.5%)
3. Germany	7 764	9 351	10 662
4. Portugal	9 773	10 097	9 309
5. Netherlands	2 489	4 556	8 141

Source: TradeMap

An analysis of the table above confirms that **China is the leading exporter of HS Code 691110** products to Spain, with a total export value of 25 714 000$ in 2024. Significantly, **Turkey** ranks as the **second-largest supplier**, exporting 12 354 000$ worth of ceramic tableware to the Spanish market during the same period.

This strong performance highlights **Turkey's competitive position** and growing relevance in Spain's ceramic tableware import landscape. While China maintains a clear lead, Turkey's solid ranking reflects its **ability to meet Spanish demand** with appealing product offerings in terms of price, design, and quality.
This sets the stage for further expansion of Turkish exports in this category, should suppliers continue to align with market expectations and consumer trends.

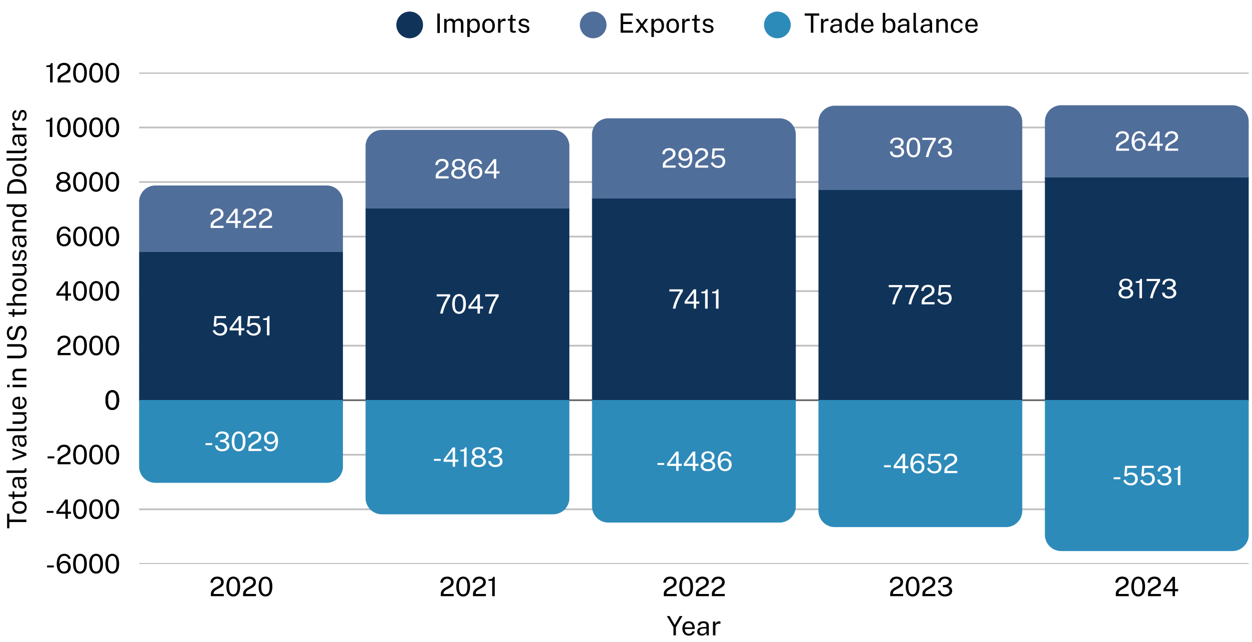
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 691190 | Household and toilet articles, of porcelain or china (excl. tableware and kitchenware, baths, bidets, sinks and similar sanitary fixtures, statuettes and other ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packing of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)**

Graph 12 - Exports, Imports and Trade balance of the HS Code 691190 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Between 2020 and 2024, Spain's products under the **HS Code 691190** experienced a steady rise in imports - from 5 451 999$ to 8 173 000$ - indicating **strong and growing domestic demand**. Exports also increased, but at a slower pace, moving from 2 422 000$ to 2 642 000$ in the same period. As a result, the **trade deficit widened each year**, reaching a negative balance of 5 531 000$ in 2024.

This persistent and growing trade gap underscores **Spain's increasing dependence on imported ceramic tableware** and presents a clear opportunity for international suppliers to expand their presence in the market.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 5 - Spain's main importing and exporting countries for HS code 691190 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. France	3 376	3 307	3 758
2. Portugal	829	1 211	1 197
3. China	1 075	1 240	868
4. Germany	328	460	861
5. Italy	725	797	705
20. Turkey	284 (3.8%)	10 (0.1%)	10 (0.1%)

Source: TradeMap

In 2024, Spain's imports of the HS Code 691190 were predominantly sourced from nearby European countries, with **France leading the list** at 3 758 000$. Other key suppliers included **Portugal, China, Germany, and Italy**, reflecting a diversified yet **regionally concentrated import pattern.**
This dependency on foreign suppliers, especially within Europe, highlights the **strategic importance of proximity** and established trade relationships in this product category. While non-European countries like China also contribute notably, the dominance of EU partners suggests **logistical and regulatory advantages** that continue to shape Spain's sourcing decisions.

Turkey's role in this sector remains **minimal**, with only 10 000$ in exports to Spain in 2024, indicating **limited market penetration** and **untapped potential** for Turkish suppliers seeking entry into the Spanish ceramic market.

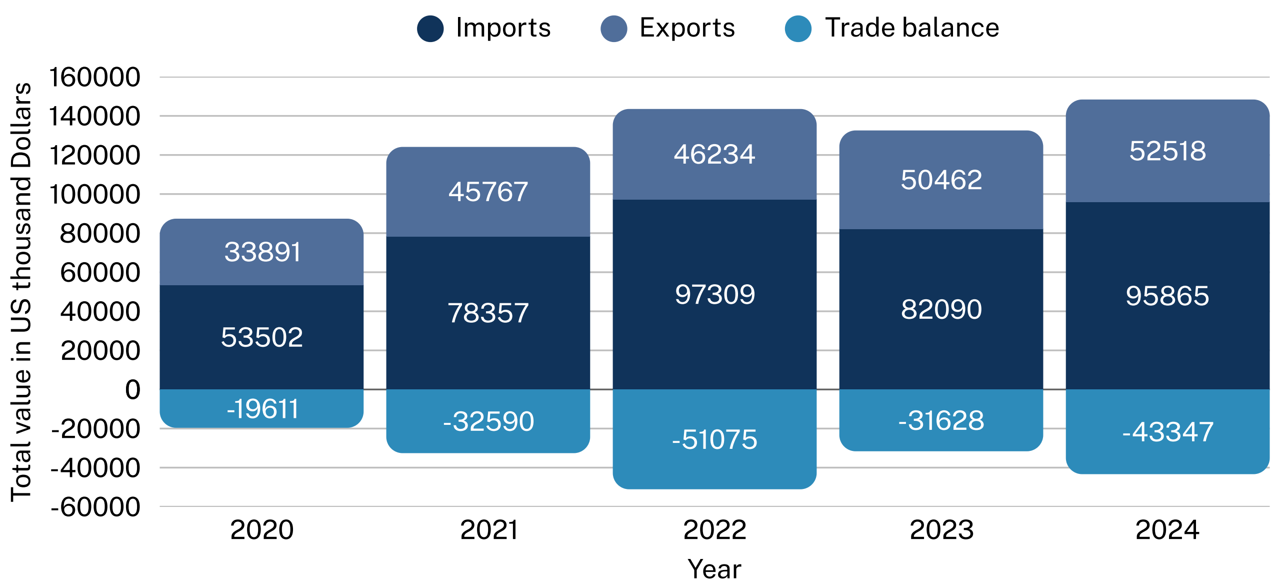
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 691200 | Tableware, kitchenware, other household articles and toilet articles, of ceramics other than porcelain or china (excl. baths, bidets, sinks and similar sanitary fixtures, statuettes and other ornamental articles, pots, jars, carboys and similar receptacles for the conveyance or packing of goods, and coffee grinders and spice mills with receptacles made of ceramics and working parts of metal)**

Graph 13 - Exports, Imports and Trade balance of the HS Code 691200 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

From 2020 to 2024, Spain's category of products under the **HS Code 691200** experienced **notable growth in both imports and exports**, though the increase in **imports far outpaced** that of exports. Imports rose sharply from 53 502 000$ in 2020 to 95 865 000$ in 2024, peaking at 97 309 000$ in 2022, reflecting **strong and sustained domestic demand**. Meanwhile, exports grew more moderately, from 33 891 000$ to 52 518 000$ over the same period.

Despite these positive trends, the **trade balance remained consistently negative**, with the deficit widening from 19 611 000$ in 2020 to 43 347 000$ in 2024. This ongoing imbalance underscores **Spain's increasing reliance on imported ceramic kitchenware** and signals a clear opportunity for international suppliers.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 6 - Spain's main importing and exporting countries for HS code 691200 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	47 400	33 913	44 243
2. Portugal	16 629	17 184	17 919
3. Romania	8 861	6 132	6 815
4. Netherlands	5 252	3 973	4 586
5. Italy	4 318	3 092	4 550
7. Turkey	2 395 (2.5%)	1 945 (2.4%)	3 687 (3.8%)

Source: TradeMap

In 2024, Spain remained heavily reliant on foreign suppliers for products classified under **HS Code 691200**. **China** was by far the **leading exporter to Spain**, with import values reaching 44 243 000, more than double that of the second-largest supplier, Portugal, at 17 919 000$.

This data highlights China's dominant position in this market segment, as well as **Spain's continued integration with nearby European trade partners** such as Portugal and Italy. Among the top suppliers, **Turkey ranked seventh**, exporting 3 687 000$ worth of goods to Spain in this category.

Although **Turkey's share remains moderate**, its stable presence in the Spanish market reflects **growing competitiveness** and room for further expansion.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

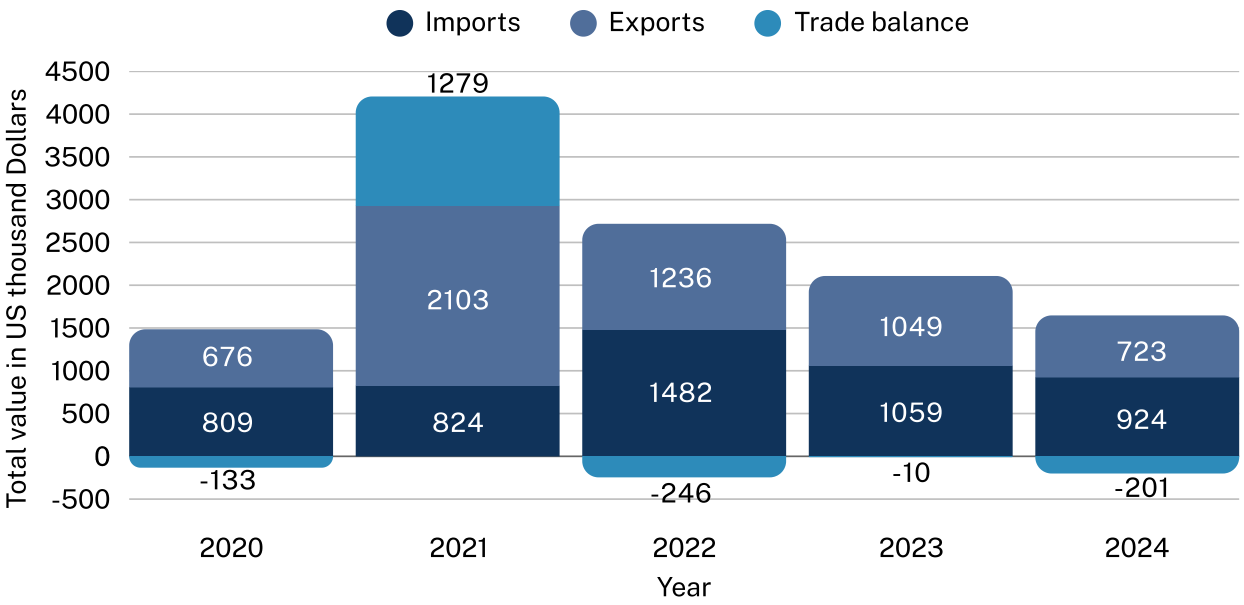
2.1. Market Size & Growth

Category: Glass Kitchenware & Houseware

Total value of imports (2024) - 238 009 000$

- **HS 701310 | Glassware of glass ceramics, of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes (excl. goods of heading 7018, cooking hobs, leaded lights and the like, lighting fittings and parts thereof, atomizers for perfume and the like)**

Graph 14 - Exports, Imports and Trade balance of the HS Code 701310 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

In 2021, Spain recorded a significant increase in international trade under **HS Code 701310**, with exports rising sharply to 2 103 000$. This marked the highest export value in the period and led to the only positive trade balance observed, as imports also grew that year. However, this upward trend did not continue. From 2022 to 2024, **both exports and imports declined steadily**. As a result, the trade balance worsened each year. Among these, 2022 had the lowest trade balance, followed by 2024 with the second-lowest.

In summary, while 2021 was a peak year for trade in this category, the following years showed a consistent decline in both trade volume and balance.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 7 - Spain's main importing and exporting countries for HS code 701310 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. Germany	634	356	389
2. Netherlands	286	312	121
3. China	175	63	119
4. Italy	10	37	66
5. Austria	91	42	48
11. Turkey	8 (0.5%)	4 (0.4%)	10 (1.1%)

Source: TradeMap

In 2024, Spain's imports of products under the **HS Code 701310**, were led by **Germany**, which exported goods worth 389 000$ to the Spanish market. The Netherlands followed in second place, while China, Italy, and Austria completed the top five.
This import structure underscores **Spain's reliance on both European neighbors and select global producers** to meet domestic demand for glass tableware. It also highlights the **strong presence of EU trade partners** in shaping Spain's sourcing patterns.

Turkey ranked 11th among exporters to Spain in this category, with exports totaling only 1000$ equivalent to just **1% of total imports**. This limited participation suggests that Turkish suppliers have yet to establish a meaningful presence in the Spanish market.

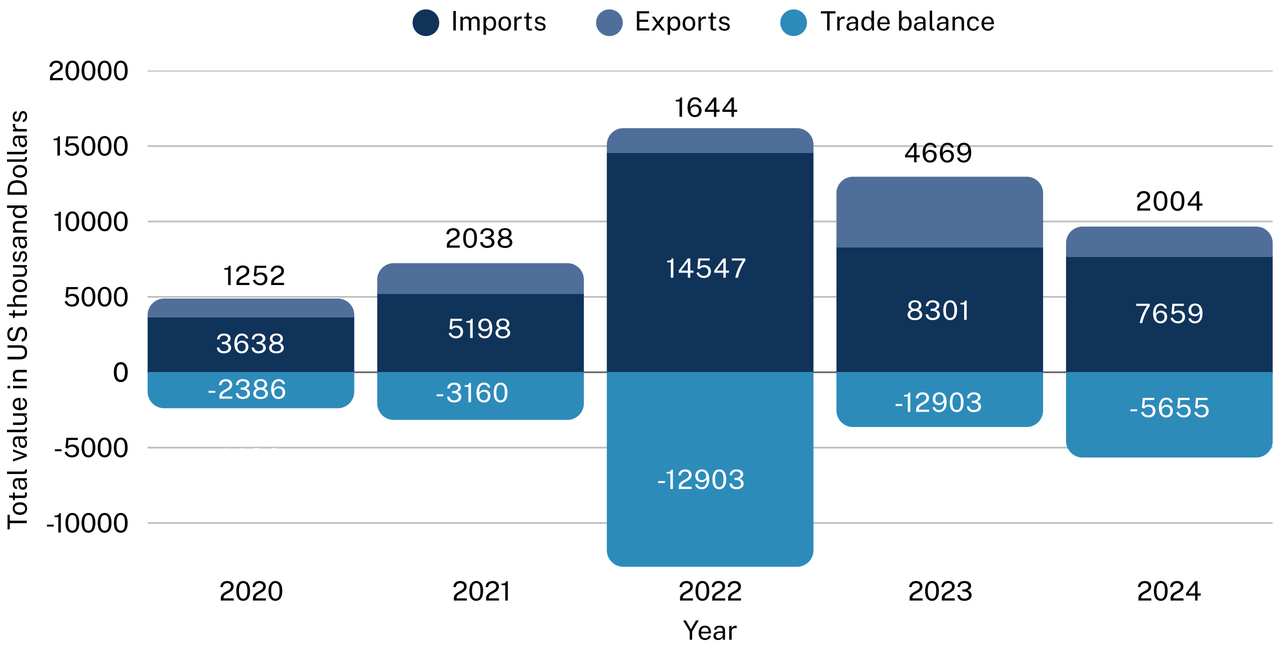
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701322 | Drinking glasses, stemware, of lead crystal**

Graph 15 - Exports, Imports and Trade balance of the HS Code 701322 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Between 2020 and 2024, Spain consistently recorded a **trade deficit** in products under the HS Code 701322. The largest deficit occurred in 2022, when it reached 12 903 000$, due to a significant increase in imports.

Imports steadily increased from 3 638 000$ thousand in 2020 to a peak of 14 547 000$ thousand in 2022, before declining slightly in the following years. In contrast, exports remained much lower throughout the period, reaching their highest value in 2023 at 4 669 000$ thousand.

In summary, despite some improvement in exports in 2023, **Spain remained heavily reliant on foreign suppliers for these products, highlighting a persistent imbalance in trade for this category**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 8 - Spain's main importing and exporting countries for HS code 701322 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. Portugal	14 001	7 217	6 813
2. Germany	47	431	184
3. France	69	31	152
4. China	116	30	114
5. Czech Republic	73	105	97
11. Turkey	3 (0.02%)	16 (0.2%)	16 (0.2%)

Source: TradeMap

In 2024, **Portugal** remained Spain's primary supplier of products under **HS Code 701322**. Despite a continued decline in export volumes compared to previous years, Portugal maintained a dominant position with a total export value of 6 813 000$.
Other notable suppliers included **China and the Czech Republic**, which ranked fourth and fifth respectively, reflecting varying levels of market recovery and stability.

Turkey ranked 11th among exporters to Spain, with an export value of just 16 000$, representing less than 1% of Spain's total imports in this segment. This minimal share points to a **limited presence in the Spanish market** and signals potential for Turkish producers to increase participation.

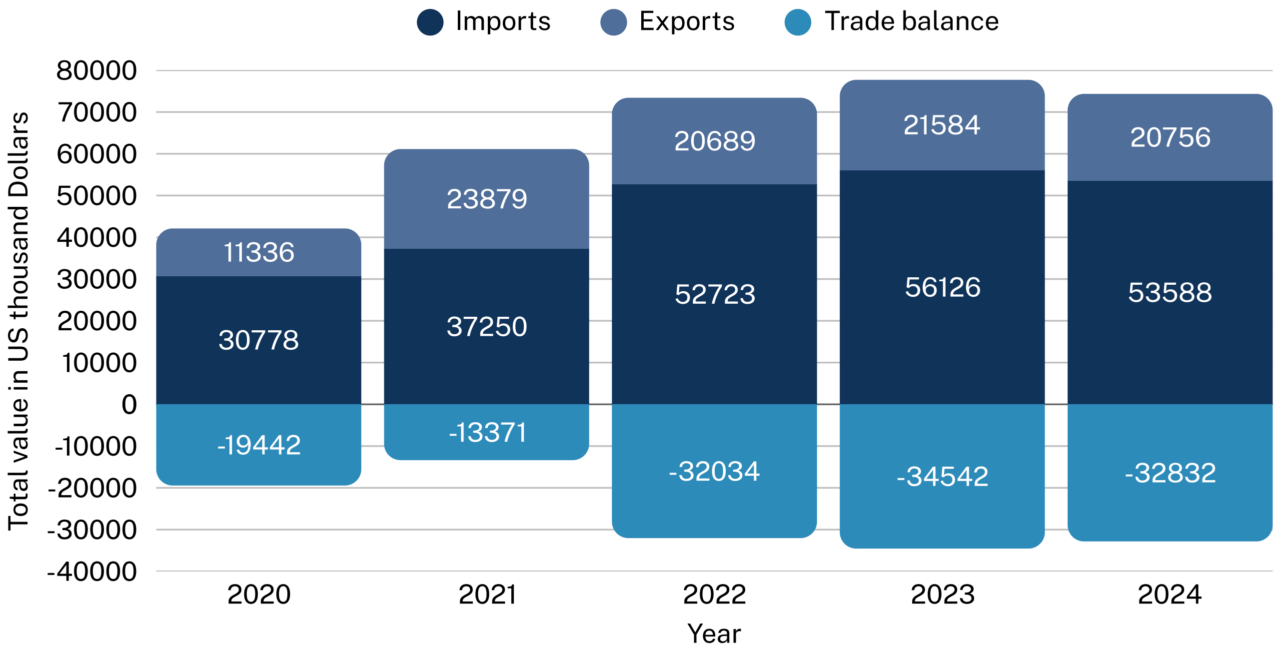
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701328 | Drinking glasses, stemware (excl. of glass ceramics or of lead crystal)**

Graph 16 - Exports, Imports and Trade balance of the HS Code 701328 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Between 2020 and 2024, Spain's imports were significantly higher than exports each year, which led to a **negative trade balance** throughout the period.

The deficit worsened over time, reaching its lowest point in 2023, with a gap of 34 542 000$, before improving slightly in 2024 to 32 832 000$. Despite this modest improvement, the structural imbalance persisted, with imports more than double the value of exports.

Overall, the data indicates that **Spain remains heavily dependent on foreign suppliers** for this category of glassware, with limited capacity to offset this through exports.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 9 - Spain's main importing and exporting countries for HS code 701328 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. Germany	10 334	12 464	10 335
2. Turkey	5 553 (11%)	5 746 (10%)	7 116 (13%)
3. France	5 694	7 154	6 453
4. Portugal	3 828	5 608	6 281
5. Italy	7 980	7 704	5 566

Source: TradeMap

In 2024, **Germany** remained the **leading exporter to Spain** for products under **HS Code 701328**. However, Germany's export value saw a decline compared to 2023, signaling a potential shift in market dynamics.

Turkey emerged as a notable player in this category, showing steady growth and ranking as the **second-largest exporter to Spain** in 2024. This upward trend underscores Turkey's increasing competitiveness and growing presence in the Spanish market for glassware.

The evolving import landscape reflects a **gradual diversification of Spain's supplier base**, with countries like Turkey gaining traction as reliable partners in the glassware sector.

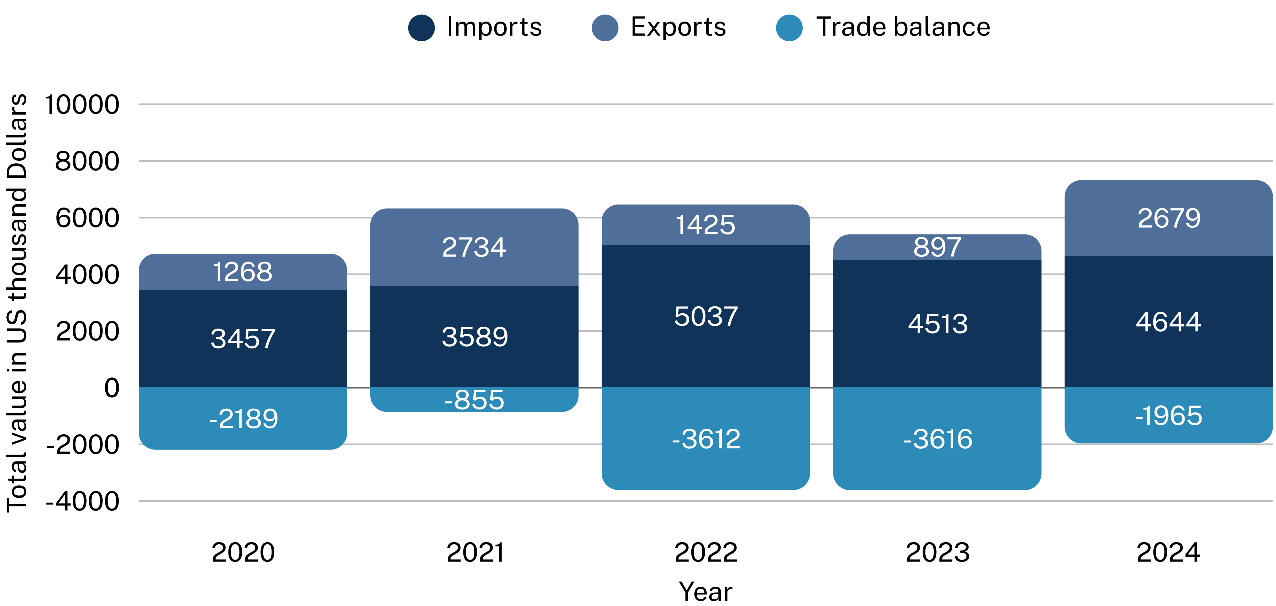
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701333 | Drinking glasses of lead crystal (excl. stemware)**

Graph 17 - Exports, Imports and Trade balance of the HS Code 701333 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

The graph 14 outlines Spain's trade performance considering the HS code 701333, marked by a **consistent trade deficit throughout the five-year period.** In 2020, imports totaled 3 457 000$ while exports were 1 268 000$, resulting in a deficit of 2 189 000$.
The trade gap widened again in 2022 and 2023, reaching -3 612 000$ and -3 616 000$ respectively, driven by declining exports and growing import volumes. This indicates **increased dependency on foreign goods** and weakened export competitiveness during those years.

In 2024, the outlook improved: exports recovered to 2 679 000$ while imports remained relatively stable at 4 644 000$. This reduced the trade deficit to 1 965 000$, suggesting a potential rebound in Spain's export sector.

Overall, while trade imbalances persisted, the upward shift in exports by 2024 points to **gradual recovery and improved external trade dynamics**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 10 - Spain's main importing and exporting countries for HS code 701333 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	973	809	1699
2. Germany	313	74	1295
3. France	2279	1885	853
4. Poland	142	701	390
5. Italy	557	660	123
16. Turkey	61 (1.2%)	22 (0.5%)	7 (0.2%)

Source: TradeMap

In 2022, **France** was Spain's **leading exporter by value**. However, as Spain's imports from France declined over the following years, other countries gained prominence. By 2024, **China had risen to become the top supplier**, exporting 1 699 000$ worth of goods to Spain and accounting for over one-third of Spain's total imports in this category.

Germany, the second-largest exporter to Spain in 2024, experienced a significant increase in export value since 2022. Poland and Italy ranked third and fourth, with exports to Spain valued at 390 000$ and 123 000$ respectively.

Turkey, that ranked 16th, saw a decline in exports since 2022, contributing just 0.2% of Spain's total imports in 2024.

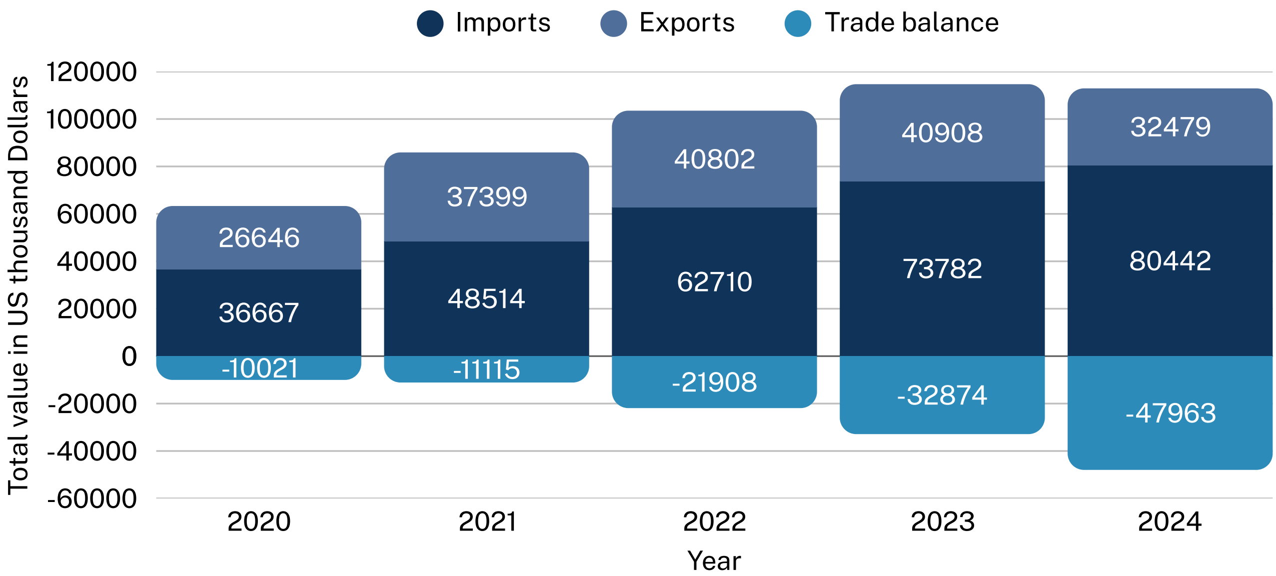
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701337 | Drinking glasses (excl. glasses of glass ceramics or of lead crystal and stemware)**

Graph 18 - Exports, Imports and Trade balance of the HS Code 701337 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

The graph 18 outlines Spain's trade performance considering the HS code 701337, marked by an **increasing trade deficit throughout the five-year period.** While **exports showed an upward trend from 2020 to 2023** - rising from 26 646 000$ in 2020 to a peak of 40 908 000$ in 2023 - this **growth was not sufficient to keep up with the pace of imports.** In 2024, exports declined to 32 479 000$, marking the first drop after three consecutive years of expansion.

Imports increased substantially throughout the period and as a result, the trade deficit deepened significantly, from -10 021 000$ in 2020 to -47 963 000$ in 2024 — the highest deficit recorded in the series.

This indicates Spain's **increased dependency on foreign goods.**

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 11 - Spain's main importing and exporting countries for HS code 701337 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. Turkey	8 837 (14.1%)	13 837 (18.8%)	15 134 (18.8%)
2. France	12 438	10 699	12 941
3. China	9 657	11 817	12 893
4. Italy	10 112	11 042	9 582
5. Germany	4 357	5 575	7 140

Source: TradeMap

In 2024, **Turkey was Spain's top trading partner**, with exports reaching 15 134 000$, maintaining a market share of **18.8%**, the same as in 2023.

France, although regaining some ground in 2024 compared to the previous year, remained in **second place**, with exports of 12 941 000$. **China followed closely** behind, ranking third, with a consistent upward trend from 2022 to 2024. This indicates **China's strengthening trade relationship with Spain.**

Italy, on the other hand, experienced a slight decline in export value to Spain, dropping from 11 042 000$ in 2023 to 9 582 000$ in 2024, despite a rise in 2023 compared to 2022. **Germany showed a steady growth** in exports over the three-year period, increasing from 4 357 000$ in 2022 to 7 140 000$ in 2024, positioning itself as the fifth-largest exporter to Spain.

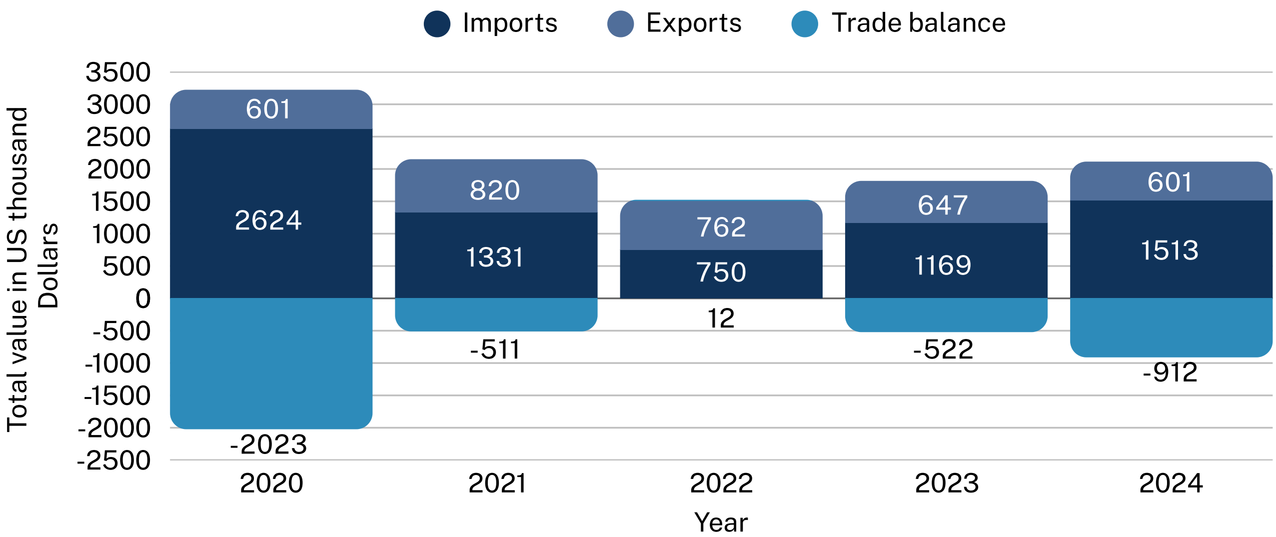
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701341 | Glassware of lead crystal, of a kind used for table or kitchen purposes (excl. articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)**

Graph 19 - Exports, Imports and Trade balance of the HS Code 701341 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 19 reveals a **persistent trade deficit** under HS code 701341 throughout the 2020–2024 period. In 2020, Spain recorded a **significant deficit of 2 023 000$**, with imports amounting to 2 624 000$, far surpassing exports.

Although the **trade gap narrowed slightly in 2021**, it remained negative as imports continued to exceed exports. In 2022, the **trade balance momentarily reached a marginal surplus** of 12 000$, marking a brief turnaround driven by a relative balance between exports and imports. However, this was short-lived.

The deficit returned in 2023 and widened further in 2024, reaching **-912 000$**. This was primarily due to rising import values and **reflects an increasing deficit trend**, suggesting growing dependence on imports in Spain for this category.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 12 - Spain's main importing and exporting countries for HS code 701341 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	387	771	857
2. Portugal	100	17	294
3. Germany	31	132	164
4. Bulgaria	32	74	51
5. Turkey	2 (0.3%)	5 (0.4%)	42 (2.8%)

Source: TradeMap

In 2024, **China** maintained its position as **Spain's leading supplier** for HS Code 701341, with imports reaching 857 000$, continuing a steady increase from previous years. This trend reflects **China's clear dominance in this segment**. **Portugal ranked second** in 2024, recovering significantly from a dip in 2023, with imports rising from 17 000$ to 294 000$, indicating a renewed trade dynamic between the two countries for this product category. **Germany followed in third place**, also showing consistent growth, suggesting **strengthening bilateral trade in this niche** product area. **Bulgaria**, despite being overtaken by Germany, **remained among the top suppliers**, although its exports to Spain declined in 2024 compared to the previous year.

Turkey, while still contributing a relatively small share, **experienced a significant relative growth**, with its market share increasing from 0.3% to 2.8%, indicating emerging relevance in Spain's import landscape for this specific HS code.

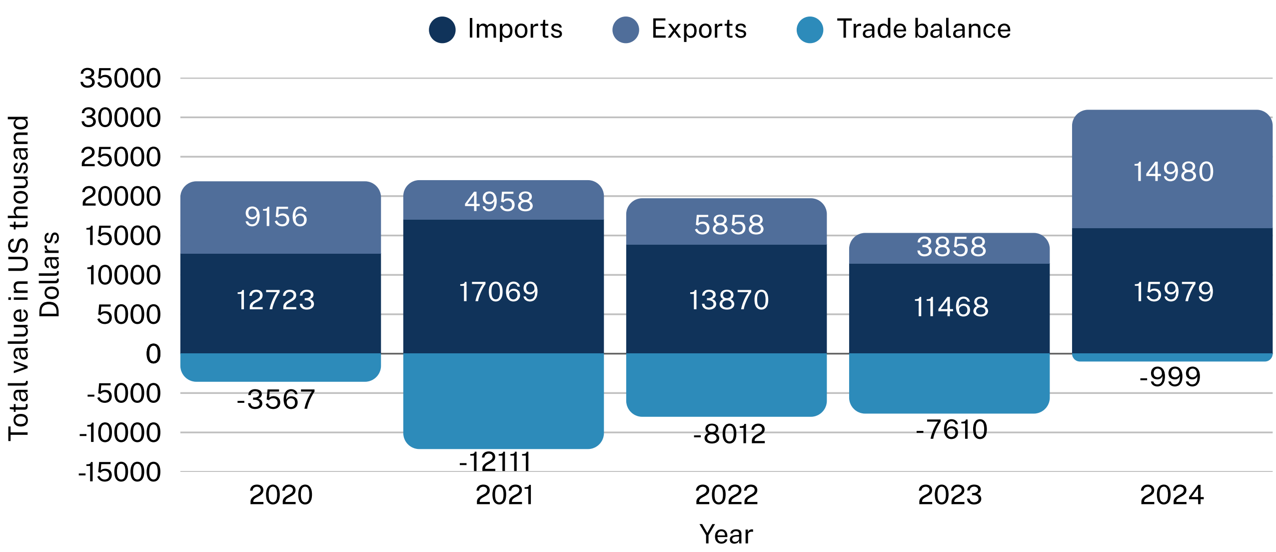
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701342 | Glassware for table or kitchen purposes of glass having a linear coefficient of expansion <= 5 x 10 -6 per kelvin within a temperature range of 0°C to 300°C (excl. glassware of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)**

Graph 20 - Exports, Imports and Trade balance of the HS Code 701342 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 20 outlines Spain's trade performance for HS code 701342, characterized by a **persistent trade deficit** over the 2020–2024 period. In 2020, imports stood at approximately 12 723 000$, while exports were around 9 156 000$, resulting in a trade deficit of about **3 567 000$**.

By 2024, the trade deficit was the lowest during the period, approximately 999 000$, indicating a notable improvement in the trade balance.

Overall, despite ongoing trade imbalances, the significant rise in exports in 2024 **might indicate a positive trend toward restoring trade equilibrium** and strengthening Spain's export capacity in this sector.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 13 - Spain's main importing and exporting countries for HS code 701342 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. France	4 228	4 026	6 090
2. Czech Republic	5 060	4 622	3 925
3. China	2 584	1 884	3 889
4. Hong Kong, China	-	12	816
5. Turkey	1 332 (9.6%)	433 (3.8%)	447 (2.8%)

Source: TradeMap

In 2024, **France led the ranking** of Spain's key international partners with 6 090 000$, **followed by the Czech Republic**. France regained the top position, marking a significant increase from 2022 to 2024, while **exports from the Czech Republic to Spain decreased.**

China also emerged as a major supplier, nearly doubling its exports to 3 889 000$ in 2024, up from 1 884 000$ in 2023. Meanwhile, **Turkey's share dropped** to just 447 000$, reflecting a downward trend in its trade relevance. However, Turkey remained in the top five.

Overall, there was a dynamic shift in Spain's import landscape for this HS code, with **France and China strengthening their positions**, while traditional partners like the **Czech Republic and Turkey saw reduced influence.**

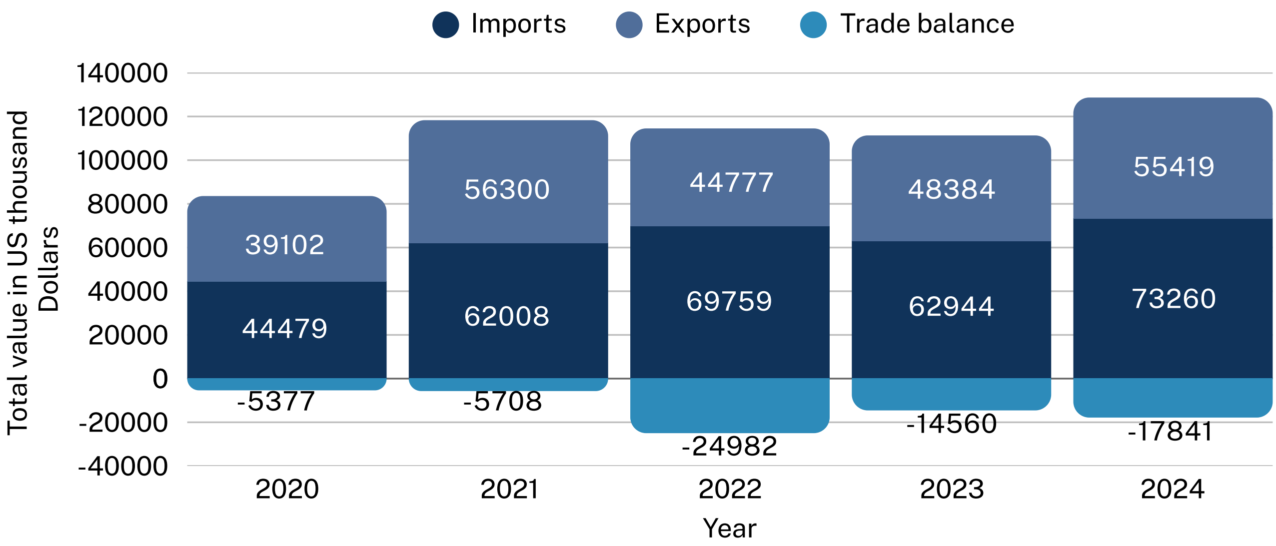
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 701349 | Glassware for table or kitchen purposes (excl. glass having a linear coefficient of expansion <= 5 x 10 -6 per kelvin within a temperature range of 0°C to 300°C, glassware of glass ceramics or lead crystal, articles of heading 7018, drinking glasses, glass preserving jars "sterilising jars", vacuum flasks and other vacuum vessels)**

Graph 21 - Exports, Imports and Trade balance of the HS Code 701349 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 21 shows Spain's trade performance for HS code 701349, consistently reflecting a **trade deficit**.

In 2020, imports were 39 102 000$ and exports 44 479 000$, resulting in a trade deficit of 5 377 000$, the lowest during this period. In 2021, both imports and exports rose, and the deficit also increased. The **deficit widened further in 2022** to nearly 25$ million, as exports increased while imports declined. **In 2023, the trade gap narrowed**. By 2024, imports peaked at 73 260 000$, while exports reached 55 419 000$, leading to another trade deficit.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 14 - Spain's main importing and exporting countries for HS code 701349 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	29 093	25 463	34 454
2. France	21 165	13 313	17 095
3. Turkey	6 845 (9.8%)	9 (15%)	5 179 (7.1%)
4. Germany	2 091	2 660	4 256
5. Poland	776	1 953	2 880

Source: TradeMap

In 2024, **China was Spain's top import partner** for HS code 701349, with imports totaling 34 454 000$.

France ranked second with 17 095 000$, which is **less than double China's total**, despite a decline from 21 165 000$ in 2022. **Turkey rose to third place** in 2024 with 5 179 000$, even though its share of Spain's total imports dropped from 15% in 2023 to 7.1%

Germany followed with 4 256 000$, showing steady growth since 2022. **Poland completed the top five**, reaching 2 880 000$ in 2024, up from just 776 000$ in 2022.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

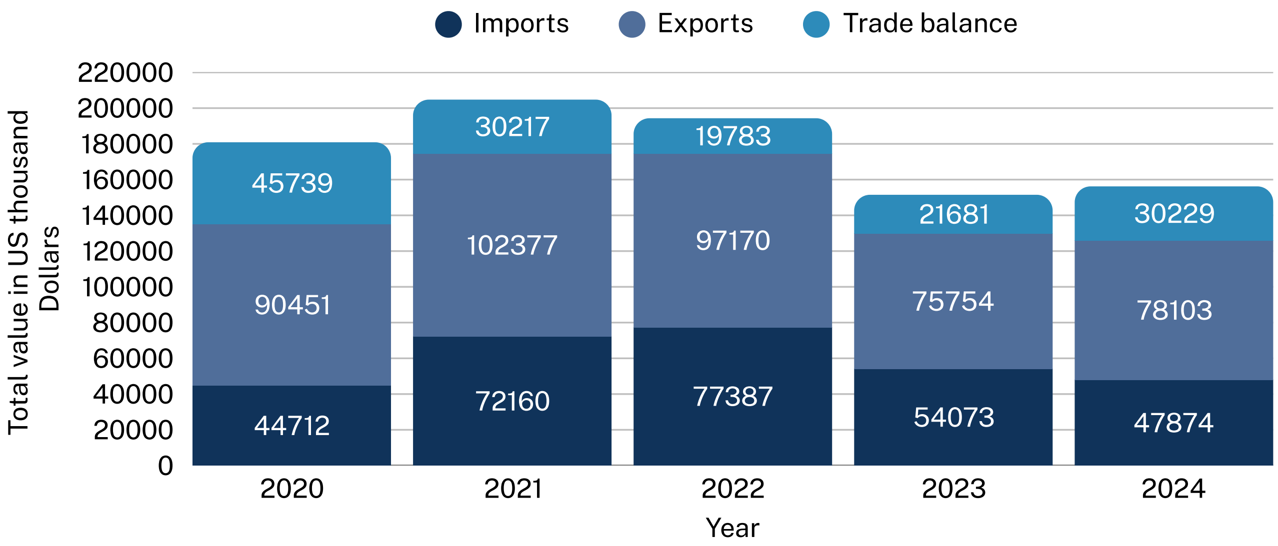
2.1. Market Size & Growth

Category: Metal Kitchenware & Houseware

Total value of imports (2024) - 634 168 000$

- **HS 732111 | Appliances for baking, frying, grilling and cooking and plate warmers, for domestic use, of iron or steel, for gas fuel or for both gas and other fuels (excl. large cooking appliances)**

Graph 22 - Exports, Imports and Trade balance of the HS Code 732111 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

In 2020, Spain imported 44 712 000$ worth of goods under HS code 732111, while exports totaled 90 451 000$, resulting in a **trade surplus of 45 739 000$ that persisted over time.** In 2021, exports peaked at 102 377 000$, while imports increased to 72 160 000$, diminishing the surplus to 30 217 000$. The trade gap decreased further in 2022, with imports at 77 387 000$ and exports falling to 97 170 000$, leading to a surplus of 19 783 000$. In 2023, the surplus increased slightly, as imports decreased to 54 073 000$. By 2024, exports recovered further and imports decreased, resulting in a **higher trade balance** of 30 229 000$, suggesting a **growing degree of independence for Spain from foreign goods** within this HS code

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 15 - Spain's main importing and exporting countries for HS code 732111 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. Turkey	15 925 (20.6%)	12 995 (24%)	12 794 (26.7%)
2. China	28 094	13 384	11 289
3. France	9 690	8 797	8 173
4. Italy	11 838	9 052	7 943
5. Portugal	3 741	2 460	2 555

Source: TradeMap

In 2024, **Turkey** became Spain's top import partner under HS code 732111, with imports totaling **12 794 000$**, representing **26.7%** of total imports. Despite a gradual decline in value since 2022, Turkey's share of Spain's imports increased.

China ranked second with 11 289 000$, continuing a **downward trend** from 28 094 000$ in 2022. **France followed in third place** with 8 173 000$, also showing a consistent decrease over the three-year period. **Italy** ranked fourth with 7 943 000$, down from 11 838 000$ in 2022.

Portugal completed the top five, with imports slightly increasing to 2 555 000$ in 2024 after a dip in 2023.

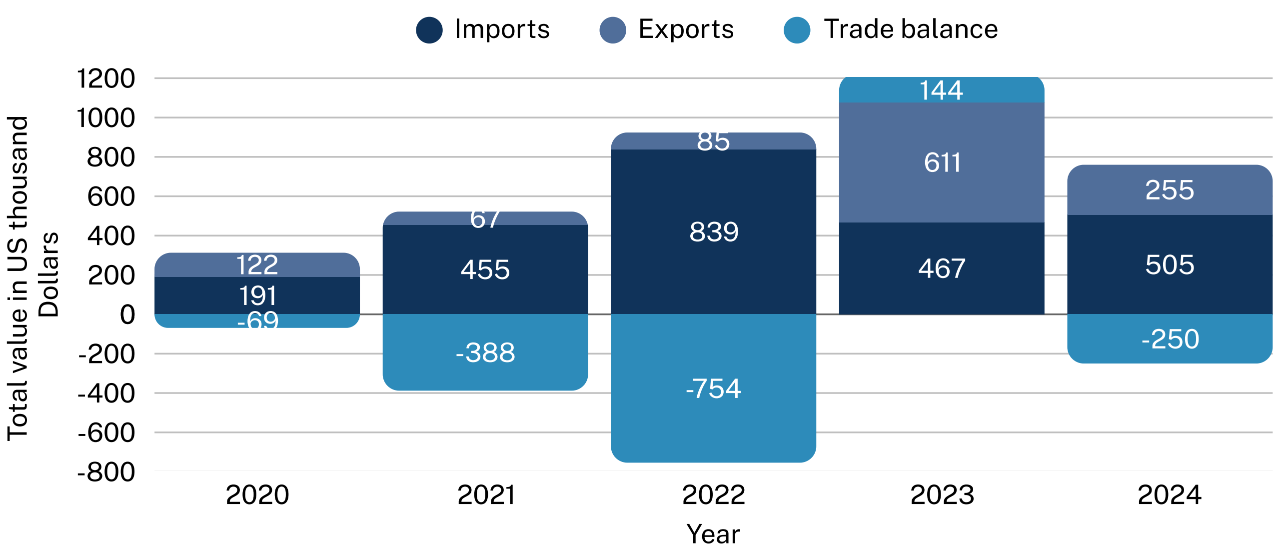
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732112 | Appliances for baking, frying, grilling and cooking and plate warmers, for domestic use, of iron or steel, for liquid fuel (excl. large cooking appliances)**

Graph 23 - Exports, Imports and Trade balance of the HS Code 732112 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

In 2020, Spain recorded a **trade deficit** under HS code 732112, with imports totaling 191 000$ and exports at 122 000$, resulting in a negative trade balance of 69 000$.

From 2021 to 2022, the country **experienced a consistent widening of the trade deficit**. In 2021, imports rose sharply to 455 000$, while exports were lower at 67 000$. The deficit deepened in 2022, reaching 754 000$, as imports climbed to 839 000$ and exports to 85 000$.

In 2023, the **trade gap was positive**, representing a **surplus**, with exports increasing sharply and imports decreasing. By 2024, exports declined to 255 000$, while imports increased to 505 000$, **resulting again in a negative trade balance of 250 000$**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 16 - Spain's main importing and exporting countries for HS code 732112 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	250	297	196
2. Latvia	-	-	154
3. Finland	64	35	65
4. Italy	5	9	32
5. Taipei, Chinese	149	30	17
22. Turkey	-	-	-

Source: TradeMap

In 2024, **China** was Spain's **top import partner** for products under **HS Code 732112**, with imports totaling 196 000$, reaffirming its strong position as a key supplier in this category.

Following China, Latvia surprisingly took second place with 154 000$ in imports, despite not appearing in the rankings in previous years, indicating a **newly established** or **rapidly growing trade relationship**. Finland ranked third, with imports increasing steadily from 35 000% in 2023 to 65 000$ in 2024, reflecting consistent growth in Finnish exports to Spain.

Together, these shifts illustrate **evolving supplier dynamics** and changing trade patterns for HS Code 732112 products in Spain.

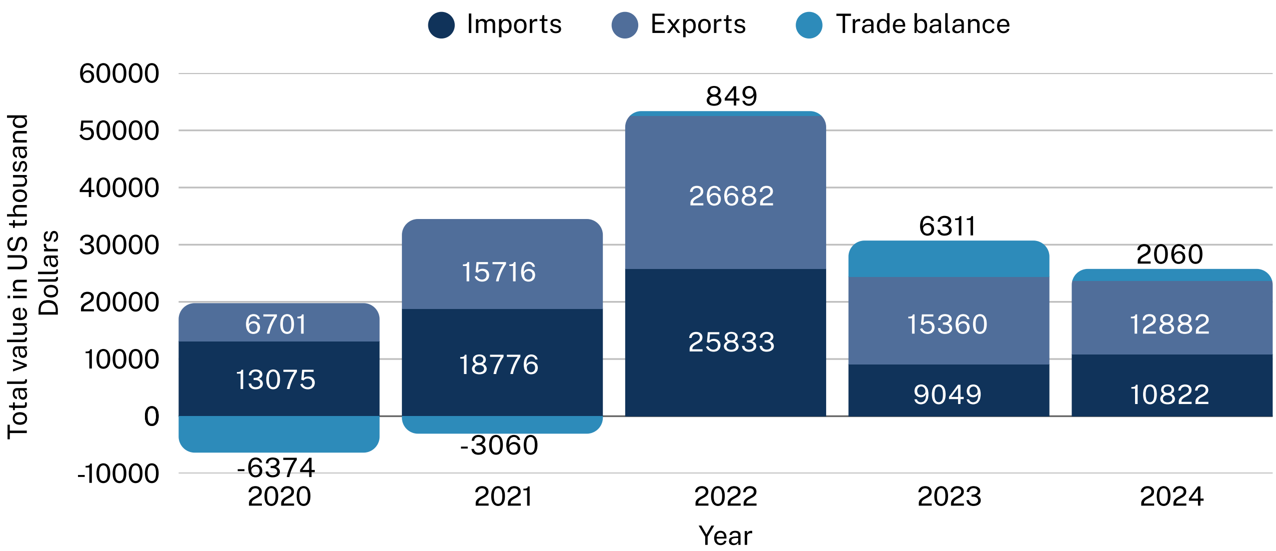
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732119 | Appliances for baking, frying, grilling and cooking and plate warmers, for domestic use, of iron or steel, for liquid fuel (excl. large cooking appliances)**

Graph 24 - Exports, Imports and Trade balance of the HS Code 732119 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 22 outlines Spain's trade performance under HS code 732119. In 2020 and 2021, Spain recorded a **trade deficit**, which **gradually diminished** and eventually **turned into a surplus** in the following years.

In 2020, imports totaled **13 075 000$**, while exports were **6 701 000$**, resulting in a **negative trade balance of 6 374 000$.** In 2021, both imports and exports increased to **18 776 000$** and **15 716 000$** respectively, slightly **reducing the deficit to 3 060 000$.** The trend continued in 2022, with **exports exceeding imports** turning the previous deficit into a **surplus of 849 000$.** However, in 2023, the **trade gap widened again to 6 311 000$**, reaching **its highest value during this period.** By 2024, exports recovered to 10 822 000$, while imports decreased to 12 882 000$, **reducing the trade surplus to 2 060 000$**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 17 - Spain's main importing and exporting countries for HS code 732119 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	15 245	3 429	6 097
2. France	2 898	1 909	1 836
3. Italy	1 389	1 003	992
4. Portugal	4 327	1 059	624
5. Denmark	499	285	336
10. Turkey	219 (0.8%)	225 (2.5%)	67 (0.6%)

Source: TradeMap

In 2024, **China was Spain's top import partner under HS code 732119**, with imports totaling **6 097 000$**, a significant increase from 3 429 000$ in 2023, but **less than half of the 2022 value. France ranked second** with **1 836 000$**, showing a slight decline from previous years. **Italy followed in third place** with **992 000$**, maintaining a **relatively stable trend**.

Portugal ranked fourth, with imports **decreasing** from **4 327 000$** in 2022 to **624 000$** in 2024. **Denmark came fifth** with **336 000$**, showing a modest increase from 285 000$ in 2023. **Turkey, ranked tenth**, recorded, representing just 0.6% of Spain's total imports, in 2024.

Comparing the 2022 to the 2024 values, all countries' exports to Spain under this HS code diminished during this period.

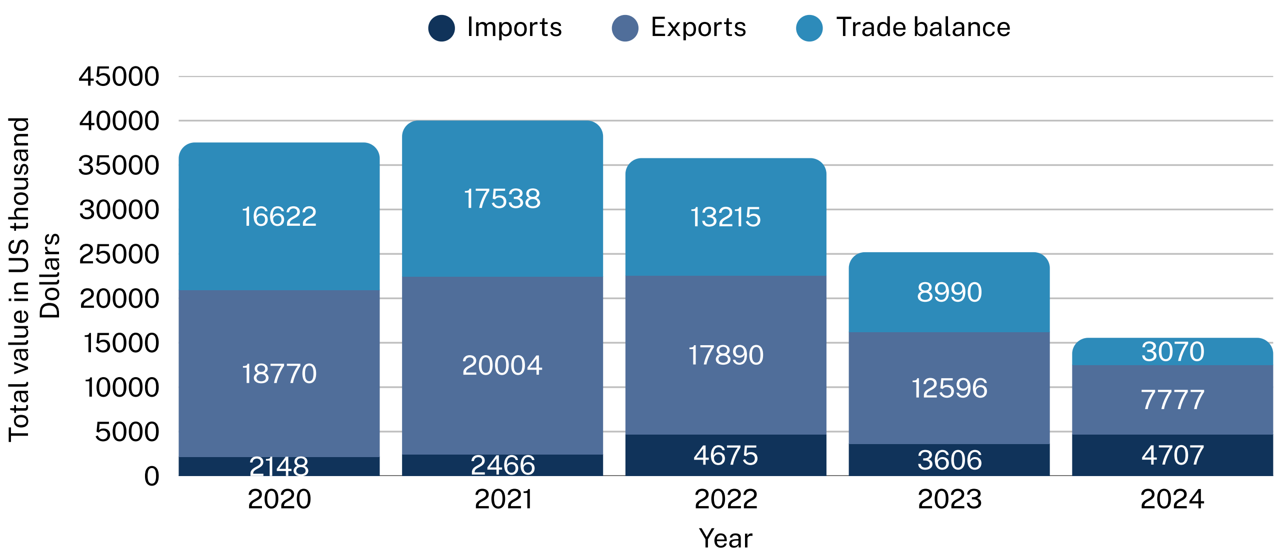
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732391 | Table, kitchen or other household articles, and parts thereof, of cast iron, not enamelled (excl. cans, boxes and similar containers of heading 7310; waste baskets; shovels, corkscrews and other articles of the nature of a work implement; articles of cutlery, spoons, ladles, forks etc. of heading 8211 to 8215; ornamental articles; sanitary ware)**

Graph 25 - Exports, Imports and Trade balance of the HS Code 732391 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

From 2020 to 2024, **Spain consistently recorded a trade surplus** under HS Code 732391. In 2020, exports reached 18 770 000$, largely surpassing imports, resulting in a surplus of **16 622 000$**. This positive trend continued into 2021, the peak of exports and the trade surplus, expanding the surplus to **17 538 000$**. From 2022 to the next years, the **surplus decreased onward**. Exports decreased steadily and, in 2023, the **surplus narrowed to 8 990 000$**, and by 2024 to 3 070 000$.

In summary, while **2021 was the strongest year** for Spain's trade balance in this category, the following years showed a **decline in trade value**. Nevertheless, the country **maintained a trade surplus throughout**, indicating **continued export strength relative to imports**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 18 - Spain's main importing and exporting countries for HS code 732391 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	2 688	2 155	3 389
2. Netherlands	321	264	268
3. Germany	220	119	266
4. France	179	109	175
5. USA	71	87	163
9. Turkey	59 (1.3%)	62 (1.7%)	51 (1.1%)

Source: TradeMap

In 2022, **China led Spain's imports** with a total of 2 688 000$. By 2024, **China had significantly strengthened its lead**, reaching **3 389 000$**, accounting for a substantial share of Spain's total imports. **The Netherlands, ranked second**, remained relatively stable at 268 000$, while **Germany, ranked third**, rebounded to 266 000$. The **difference between China and the second-ranked country is remarkably large, highlighting China's dominant position in Spain's import market.**

France saw a modest recovery to 175 000$ in 2024 after a dip in 2023. In contrast, **the USA recorded the most prominent increase in exports to Spain over the period.** Turkey, ranked ninth, **represented only 1.1%** of Spain's imports in 2024.

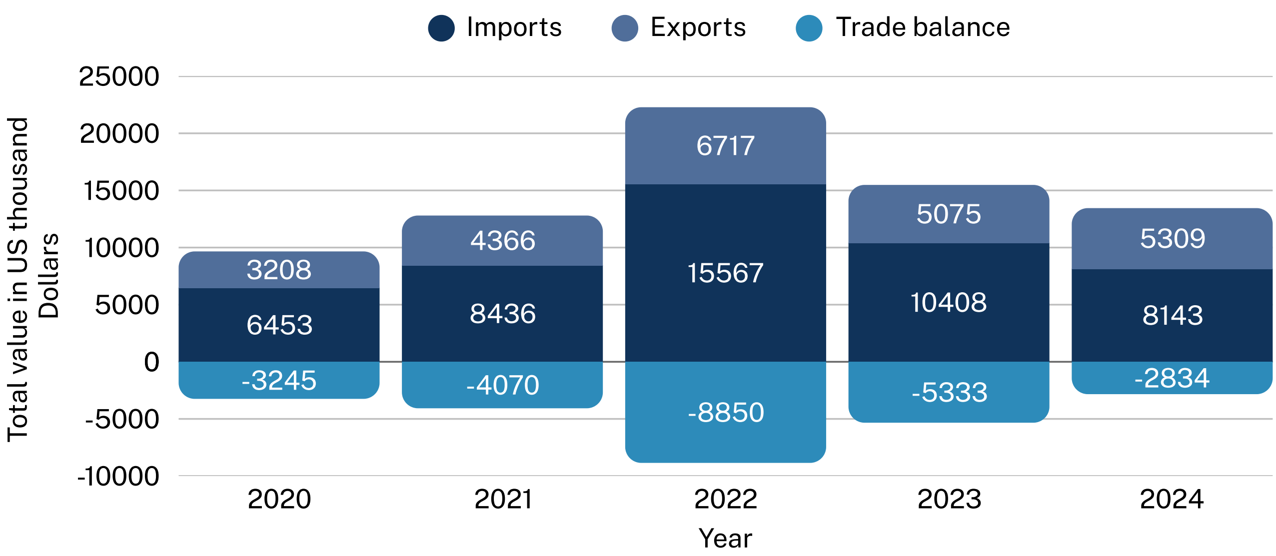
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732392 | Table, kitchen or other household articles, and parts thereof, of cast iron, enamelled (excl. cans, boxes and similar containers of heading 7310; waste baskets; shovels, corkscrews and other articles of the nature of a work implement; articles of cutlery, spoons, ladles, forks etc. of heading 8211 to 8215; ornamental articles; sanitary ware)**

Graph 26 - Exports, Imports and Trade balance of the HS Code 732392 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

From 2020 to 2024, Spain showed a **persistent trade deficit** under HS Code 732392. **Between 2020 and 2022, both exports and imports increased**; however, imports consistently exceeded exports. 2022 was the year in which both imports and exports peaked, and it also marked the widest trade deficit, reaching **-8 850 000$**. After 2022, **the trade deficit narrowed**, reaching -2 834 000$ in 2024. This improvement was due to a **significant decrease in imports and a slight decline in exports.**

Overall, while trade imbalances persisted, **Spain's performance points to a gradual recovery and improved external trade dynamics.**

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 19 - Spain's main importing and exporting countries for HS code 732392 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	10 455	3 732	3 642
2. Belgium	1 271	2 148	1 957
3. France	277	824	1 010
4. Germany	1 075	1 810	974
5. Turkey	47 (0.3%)	133 (1.3%)	130 (1.6%)

Source: TradeMap

In 2022, **China was Spain's top import partner** under HS Code 732392, with imports totaling **10 455 000$.** However, by 2024, China's exports to Spain had declined significantly to **3 642 000$**, though it remained the leading supplier. **Belgium, ranked second**, increased its exports from 1 271 000$ in 2022 to **1 957 000$** in 2024.

France also saw a steady and relevant growth, rising from 277 000$ in 2022 to **1 010 000$** in 2024. **Germany** peaked in 2023 at 1 810 000$, but dropped to **974 000$** in 2024.

Turkey, ranked fifth, showed modest growth, contributing **1.6%** of Spain's imports in 2024 with **130 000$**.

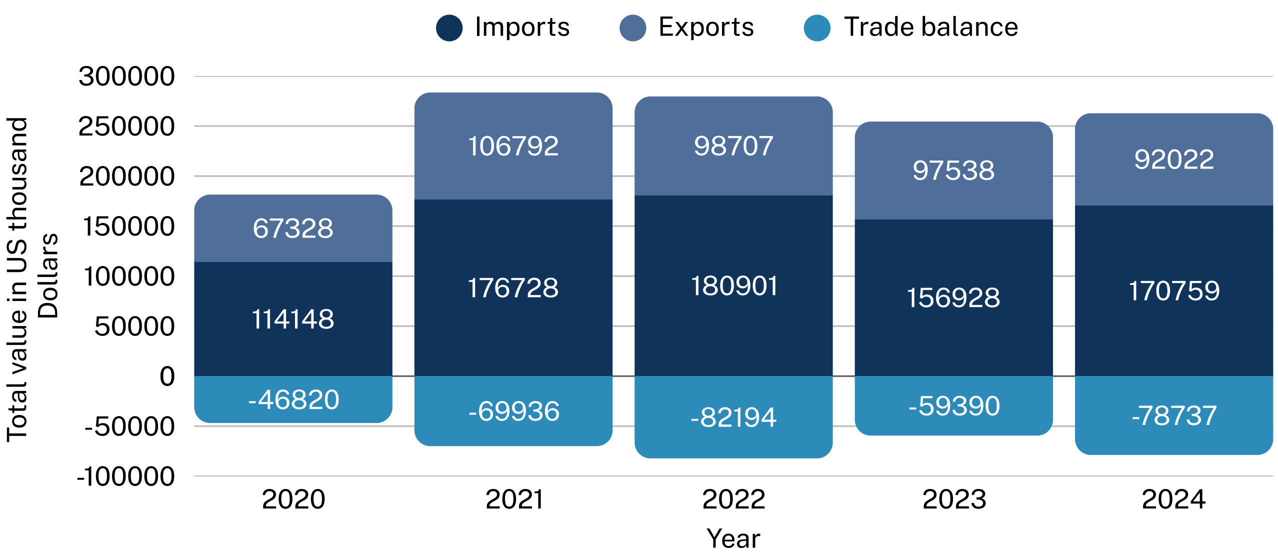
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732393 | Table, kitchen or other household articles, and parts thereof, of stainless steel (excl. cans, boxes and similar containers of heading 7310; waste baskets; shovels, corkscrews and other articles of the nature of a work implement; articles of cutlery, spoons, ladles, forks etc. of heading 8211 to 8215; ornamental articles; sanitary ware)**

Graph 27 - Exports, Imports and Trade balance of the HS Code 732393 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 27 outlines Spain's trade performance considering the HS code 732393.

In 2020, Spain imported 114 148 000$ and exported 67 328 000$, resulting in a **trade deficit** of 46 820 000$. **2022 was the year with the widest trade deficit**, in which it reached **82 194 000$.** By 2024, exports increased, reaching 170 759 000$, while imports accounted for 92 022 000$, **widening the trade deficit to 78 737 000$** compared to 2023.

In summary, although Spain maintained a trade deficit under HS Code 732393 throughout the period, by 2024 there were signs of **gradual recovery and improving trade dynamics compared to 2022**, even though the **deficit remained larger than in 2020**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 20 - Spain's main importing and exporting countries for HS code 732393 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	129 200	97 761	113 411
2. Germany	9 755	12 921	15 681
3. India	11 201	9 851	8 131
4. Italy	5 943	7 919	8 125
5. France	6 301	10 884	5 812
8. Turkey	2 756 (1.5%)	2 064 (1.3%)	2 522 (1.5%)

Source: TradeMap

In 2022, **China led by far Spain's imports** under HS Code 732393 with **129 200 000$**. By 2024, China remained the top supplier, reaching **113 411 000$**, despite a decline from 2022. **Germany rose to second place** with 15 681 000$, showing consistent growth over the period.

India and Italy followed closely, with **8 131 000$** and **8 125 000$** respectively. France, however, reduced their imports in value to Spain, decreasing from 10 884 000$ in 2023 to **5 812 000$** in 2024.

Turkey, ranked eighth, contributed **1.5%** of Spain's imports in 2024, with **2 522 000$.**

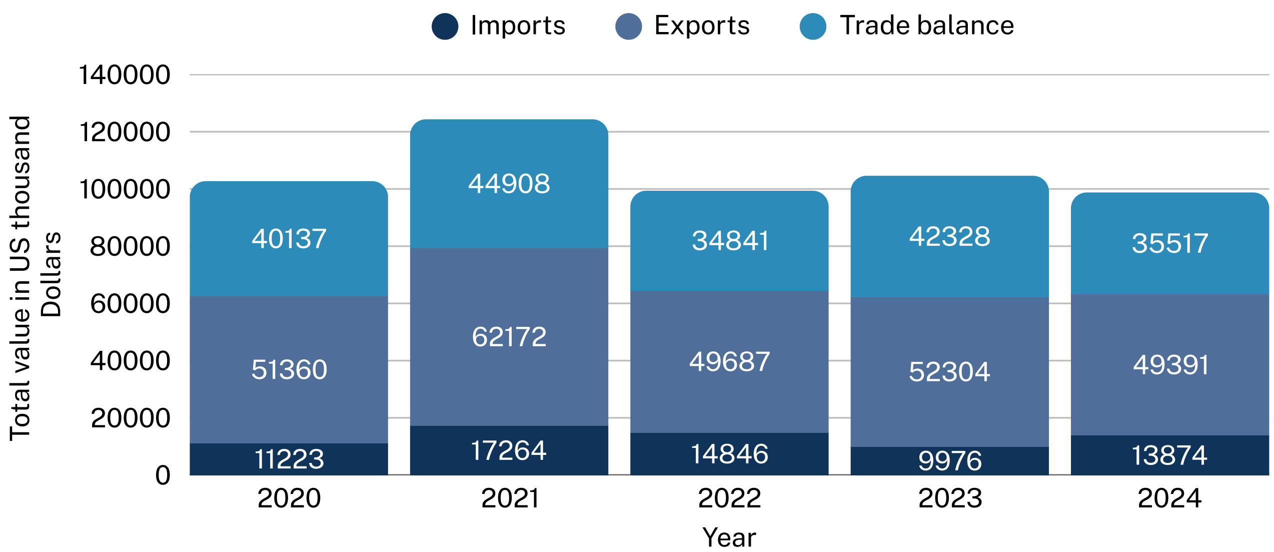
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732394 | Table, kitchen or other household articles, and parts thereof, of iron other than cast iron or steel other than stainless, enamelled (excl. cans, boxes and similar containers of heading 7310; waste baskets; shovels, corkscrews and other articles of the nature of a work implement; articles of cutlery, spoons, ladles, forks etc. of heading 8211 to 8215; ornamental articles; sanitary ware; articles for table use)**

Graph 28 - Exports, Imports and Trade balance of the HS Code 732393 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

From 2020 to 2024, Spain consistently recorded a **trade surplus** in products under HS Code 732393. Each year, the value of exports exceeded that of imports, highlighting the country's **competitive strength in this segment**. In 2021, Spain achieved the highest surplus of the period - **44 908 000$** - as exports climbed to over $62 million and imports increased to $17 264 000.

By 2024, exports stood at almost $49.4 million, while imports were at approximately $13.9 million. This led to a surplus of about **35 517 000$**, suggesting a resilient and stable export performance. Overall, **Spain demonstrated solid external trade dynamics in this product category**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 21 - Spain's main importing and exporting countries for HS code 732394 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	6 843	3 504	7 397
2. Germany	2 816	2 118	1 556
3. France	1 068	829	1 239
4. Italy	1 411	1 021	988
5. India	379	425	397
16. Turkey	440 (3%)	121 (1.2%)	94 (0.7%)

Source: TradeMap

Between 2022 and 2024, China consistently ranked as the top exporter of HS Code 732394 products to Spain. Chinese exports to Spain rose from 6 843 000 in 2022 to 7 397 000$ in 2024, despite a dip in 2023. **China dominated Spain's imports, supplying more than four times the value of the next largest trade partner, in 2024.**

Germany, which was the second-largest supplier, saw a steady decline over the same period, dropping from 2 816 000$ in 2022 to 1 556 000$ in 2024. **France, Italy, and India maintained mid-tier positions**, with France showing a slight rebound in 2024. Italy and India remained relatively stable, while **Turkey's exports dropped significantly**, from 440 000$ in 2022 to only 94 000$ in 2024, moving from **3% to just 0.7%** of Spain's total imports.

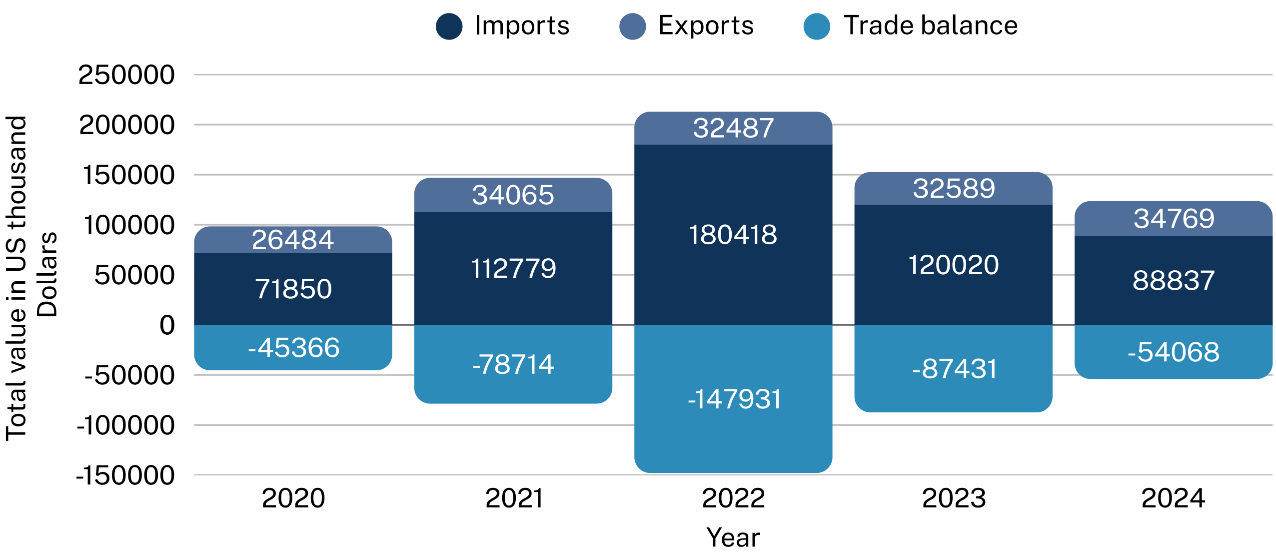
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 732399 | Table, kitchen or other household articles, and parts thereof, of iron other than cast iron or steel other than stainless (excl. enamelled articles; cans, boxes and similar containers of heading 7310; waste baskets; shovels and other articles of the nature of a work implement; cutlery, spoons, ladles etc. of heading 8211 to 8215; ornamental articles; sanitary ware)**

Graph 29 - Exports, Imports and Trade balance of the HS Code 732399 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 29 presents Spain's trade performance for HS Code 732399 between 2020 and 2024, highlighting a **persistent trade deficit** throughout the period.

In 2020, imports reached 71 850 000$, while exports were significantly lower at 26 484 000$, resulting in the **lowest trade deficit over the five-year span**, at **45 366 000$**. By 2022, the situation **worsened**, with the **trade deficit peaking at 147 931 000$** due to a significant increase in imports. However, by 2024, the situation showed signs of **improvement**, leading to a reduced trade deficit of **54 068 000$**. Although the trade balance remained negative, the steady growth in exports suggests a **gradual recovery** and a **more favorable outlook** for Spain's external trade in this product category.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 22 - Spain's main importing and exporting countries for HS code 732399 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	42 205	31 333	35 535
2. Italy	29 381	18 935	20 988
3. Germany	25 197	24 865	8 804
4. France	10 564	8 912	7 129
5. Turkey	5 835 (3.2%)	5 348 (4.5%)	4 640 (5.2%)

Source: TradeMap

In 2022, **China was already a major supplier**, but by 2024 it had **solidified its position** as Spain's top import source, with exports to Spain reaching 35 535 000$. Although this figure was lower than in 2022, it marked a recovery from the dip in 2023. **Italy followed as the second-largest exporter to Spain**, with a modest increase from 18 935 000$ in 2023 to 20 988 000$ in 2024. **Germany**, which had been a strong trade partner in 2022 and 2023, **experienced a sharp decline in 2024**, with exports falling to just 8 804 000$. **France also saw a significant drop in exports** to Spain. **Turkey**, while ranking fifth, **showed a steady decline in export value but an increasing share of Spain's total imports**, rising from 3.2% in 2022 to 5.2% in 2024.

These shifts suggest a reconfiguration of Spain's import landscape for this product category, with **China strengthening its lead and traditional European partners like Germany and France losing ground**.

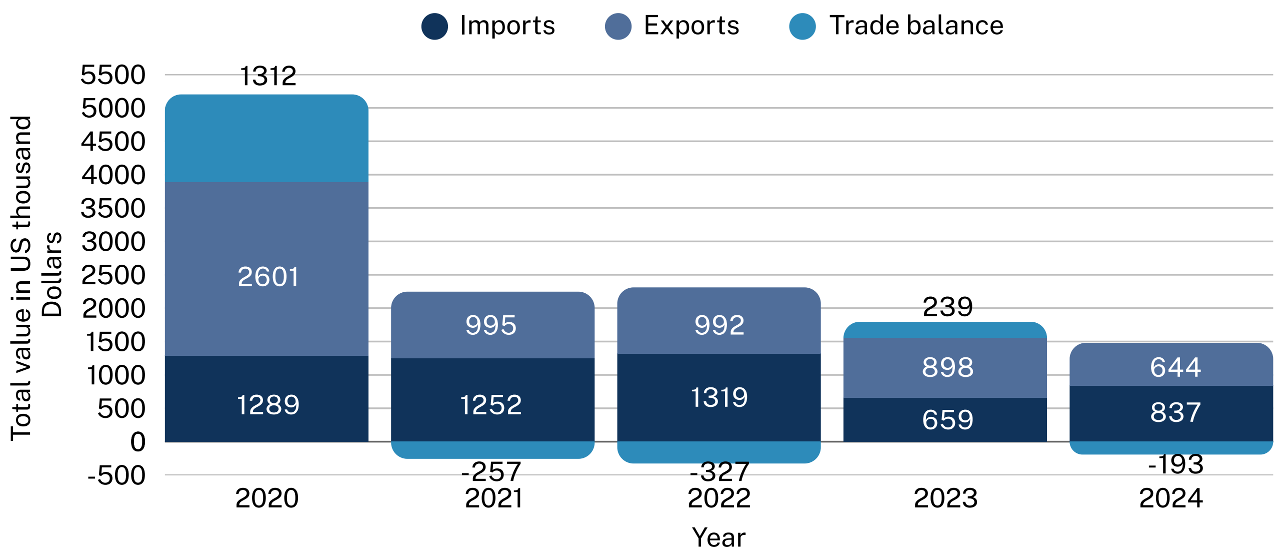
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 741810 | Table, kitchen or other household articles, and parts thereof, of iron other than cast iron or steel other than stainless (excl. enamelled articles; cans, boxes and similar containers of heading 7310; waste baskets; shovels and other articles of the nature of a work implement; cutlery, spoons, ladles etc. of heading 8211 to 8215; ornamental articles; sanitary ware)**

Graph 30 - Exports, Imports and Trade balance of the HS Code 741810 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 30 illustrates Spain's trade performance under HS Code 741810, marked by **fluctuations between trade surpluses and deficits**.

In 2020, Spain recorded a **surplus of 1 312 000$**, as exports exceeded imports. However, this shifted in 2021, when the country experienced a **trade deficit** of 257 000$. The situation **worsened in 2022**, but due to a significant drop in imports, Spain managed to return to a **surplus of 239 000$**. In 2024, the trade balance turned negative once again, though the **deficit was smaller compared to previous years.**

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 23 - Spain's main importing and exporting countries for HS code 741810 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. India	407	210	256
2. China	239	145	206
3. France	52	53	94
4. Italy	207	87	83
5. Netherlands	40	14	39
15. Turkey	2 (0.2%)	19 (2.9%)	4 (0.5%)

Source: TradeMap

Table 23 highlights Spain's main import partners for HS Code 741810 in 2024, reflecting modest trade volumes and shifting supplier dynamics.

India ranked first, with exports to Spain rising slightly to **256 000$**, showing a recovery from 2023. That year, nearly all countries saw a **decline in exports to Spain**. **China followed**, rebounding to **206 000$** in 2024 after a dip in the previous year. **France demonstrated steady growth** over the three-year period, reaching **94 000$** in 2024.

Italy, despite a significant drop from 2022 levels, remained a key supplier with **83 000$** in exports. Meanwhile, the Netherlands and Turkey recorded lower trade volumes. **Turkey's market share remained below 1%**, though it was slightly higher than in 2022, indicating a minor recovery.

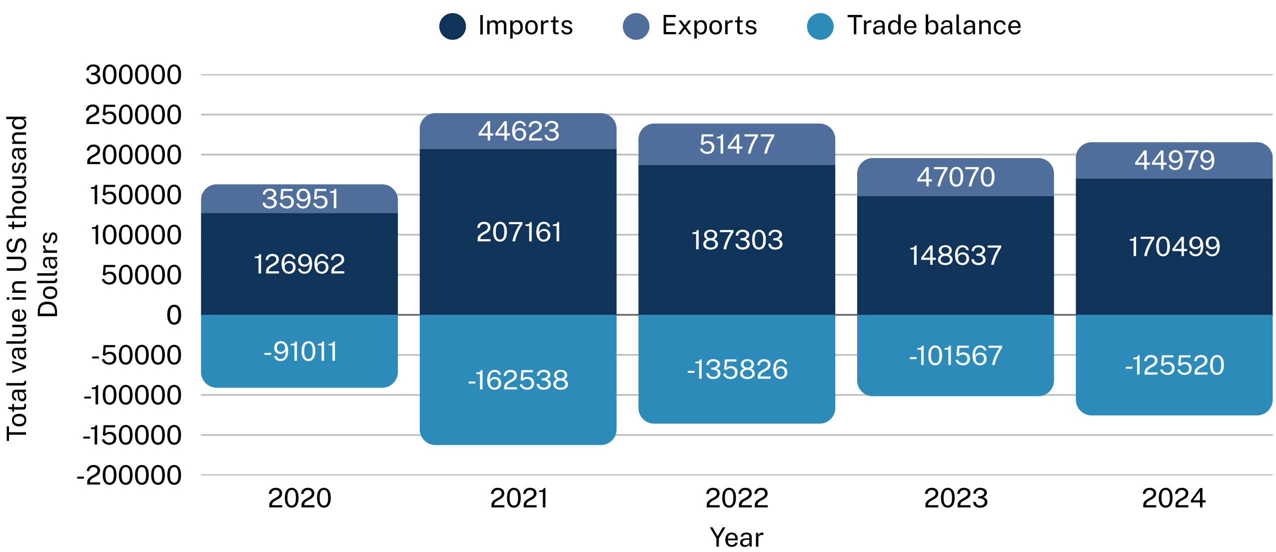
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 761510 | Table, kitchen or other household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of aluminium (excl. cans, boxes and similar containers of heading 7612, articles of the nature of a work implement, spoons, ladles, forks and other articles of heading 8211 to 8215, ornamental articles, fittings and sanitary ware)**

Graph 31 - Exports, Imports and Trade balance of the HS Code 761510 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 31 illustrates Spain's trade performance under HS Code 761510 from 2020 to 2024, characterized by a **consistent trade deficit** throughout the period.

In 2020, the trade deficit stood at 91 011 000$, however, the **trade gap widened in 2021**, with imports peaking at **207 161 000$** and the **deficit reaching its highest point at 162 538 000$**. Although imports declined in the following years, the trade balance remained negative. In 2023, **the deficit narrowed to 101 567$**, thanks to a drop in imports and relatively stable exports. However, by 2024, **the deficit increased again to 125 520$**, as imports rose to 170 499$ while exports slightly decreased to 44 979$.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 24 - Spain's main importing and exporting countries for HS code 761510 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	144 813	101 761	122 195
2. Italy	11 446	8 641	15 574
3. France	8 012	11 234	10 775
4. Portugal	3 155	6 137	6 333
5. Germany	3 456	5 407	4 436
7. Turkey	3 274 (1.7%)	2 233 (1.5%)	1 874 (1.1%)

Source: TradeMap

Table 24 outlines that **China remained the dominant exporter**, with exports to Spain reaching **122 195 000$** in 2024 - a figure that far exceeds those of all other countries. The second-largest supplier, **Italy**, exported just **15 574 000$**, meaning China's exports were nearly **eight times higher**.

France, recorded 10 775 000$ in 2024, while **Portugal showed strong growth**, rising to 13 397 000$. Germany and Turkey remained minor suppliers, with **Turkey's share falling to 1.1%** of total imports.

This stark contrast underscores **China's overwhelming dominance** in Spain's imports for this product category, while other countries, despite some growth, **remain far behind**.

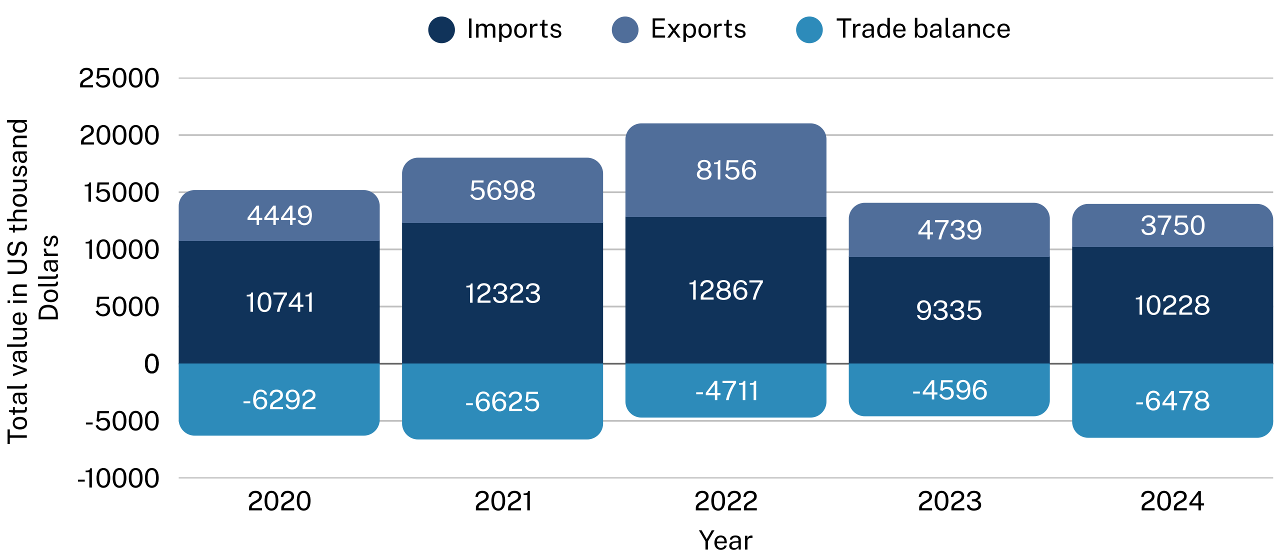
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821000 | Hand-operated mechanical devices, of base metal, weighing <= 10 kg, used in the preparation, conditioning or serving of food or drink**

Graph 32 - Exports, Imports and Trade balance of the HS Code 821000 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 32 illustrates Spain's trade performance under HS Code 821000, showing a **consistent trade deficit** across all five years.

In 2020, imports totaled **10 741 000$**, while exports reached **4 449 000$**, resulting in a deficit of **6 292 000$. The deficit widened slightly in 2021** to 6 625 000$, as imports rose to 12 323 000$ and exports to just 5 698 000$. **In 2022**, Spain saw a temporary improvement, with exports increasing narrowing the trade deficit to **4 711 000$.** However, this trend reversed in **2023**, as exports dropped the **deficit remained high at 4 596 000$**. By **2024**, the **trade gap widened again to 6 478 000$**, with exports falling further to 3 750 000$, while imports remained relatively stable at 10 228 000$.

Overall, the data reflects persistent trade imbalances and a declining export trend after 2022, suggesting **ongoing challenges in Spain's competitiveness in this product category.**

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 25 - Spain's main importing and exporting countries for HS code 821000 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	7 412	4 518	5 879
2. France	941	1 260	1 295
3. Germany	1 654	1 146	983
4. Italy	1 344	536	431
5. Belgium	317	342	284
14. Turkey	25 (0.2%)	25 (0.3%)	59 (0.6%)

Source: TradeMap

Table 25 presents Spain's main import partners for HS Code 821000 in 2024, with **China clearly dominating the list.** China exported 5 879 000$ worth of goods to Spain - **more than four times the value of France**, the second-largest supplier, which reached 1 295 000$. **Germany followed with 983 000$**, showing a recovery from a sharp drop in 2023.

Italy, once a stronger partner in 2022 with 1 344 000$, experienced a continuous decline, falling to just **431 000$ in 2024. Belgium** remained a minor supplier compared to others, with relatively stable but low values, **ending at 284 000$**.

Turkey, while contributing the least, showed a modest increase - from 25 000$ in 2022 and 2023 to 59 000$ in 2024 **- raising its share to 0.6%**.

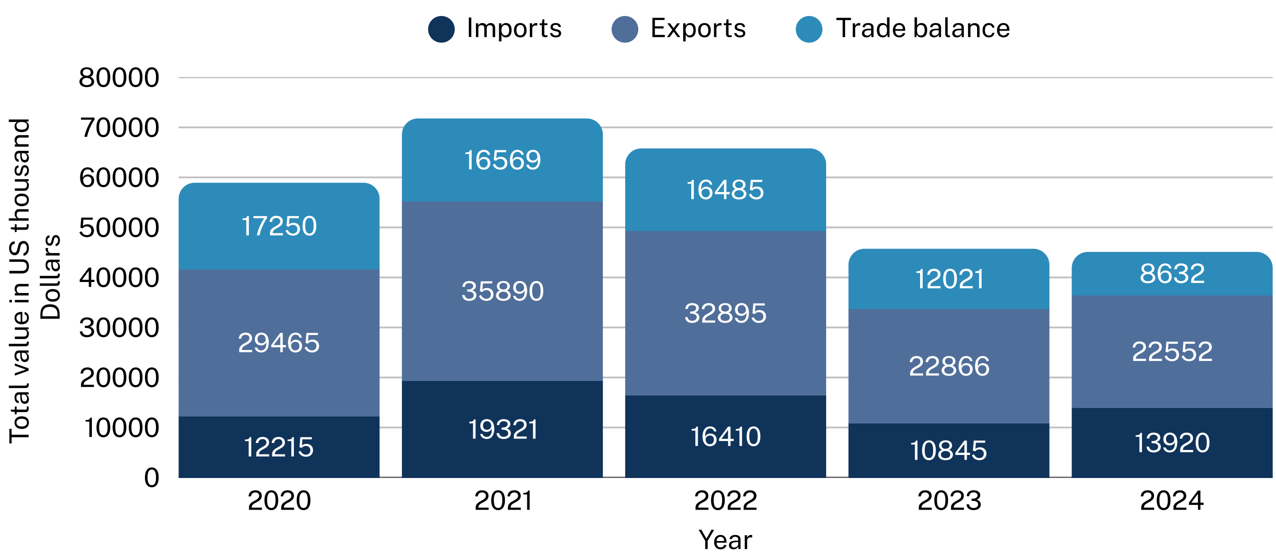
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821110 | Sets of assorted articles of knives of heading 8211; sets in which there is a higher number of knives of heading 8211 than of any other article**

Graph 33 - Exports, Imports and Trade balance of the HS Code 821110 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 33 illustrates Spain's trade performance under HS Code 821110 from 2020 to 2024, showing a **consistent trade surplus** throughout the period.

In 2020, imports totaled 12 215 000$, while exports reached 29 465 000$, resulting in a **surplus of 17 250 000$**, the highest trade surplus over the period. By 2024, **the surplus decreased**, due to a slight increase in imports and decrease in exports, reaching its minimum value, **8 632 000$**.

Although the trade balance remained positive, the declining trend in exports indicates a **gradual deterioration in Spain's external trade performance** for this product category.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 26 - Spain's main importing and exporting countries for HS code 821110 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	10 668	5 852	7 672
2. Switzerland	920	1 337	2 519
3. Germany	2 892	1 548	1 624
4. France	597	847	928
5. Japan	463	411	401
15. Turkey	1 (≈0%)	4 (≈0%)	14 (0.1%)

Source: TradeMap

Table 26 presents Spain's main import partners for HS Code 821110 in 2024, with **China leading by a wide margin**. China exported 7 672 000$ worth of goods to Spain, more than three times the value of the second-largest supplier, **Switzerland**, which reached 2 519 000$. **Germany followed** with 1 624 000$, showing a modest recovery from 2023. France and Japan remained smaller suppliers, with **France reaching 928 000$** and **Japan 401 000$** in 2024. While France showed steady growth over the three years, Japan's exports slightly declined. **Turkey, ranked fifteenth**, contributed only a minimal share to Spain's total imports.

These figures highlight **China's dominant position** in Spain's import market for this product category, while **Switzerland's rapid growth and France's steady rise reflect shifting dynamics among secondary suppliers**.

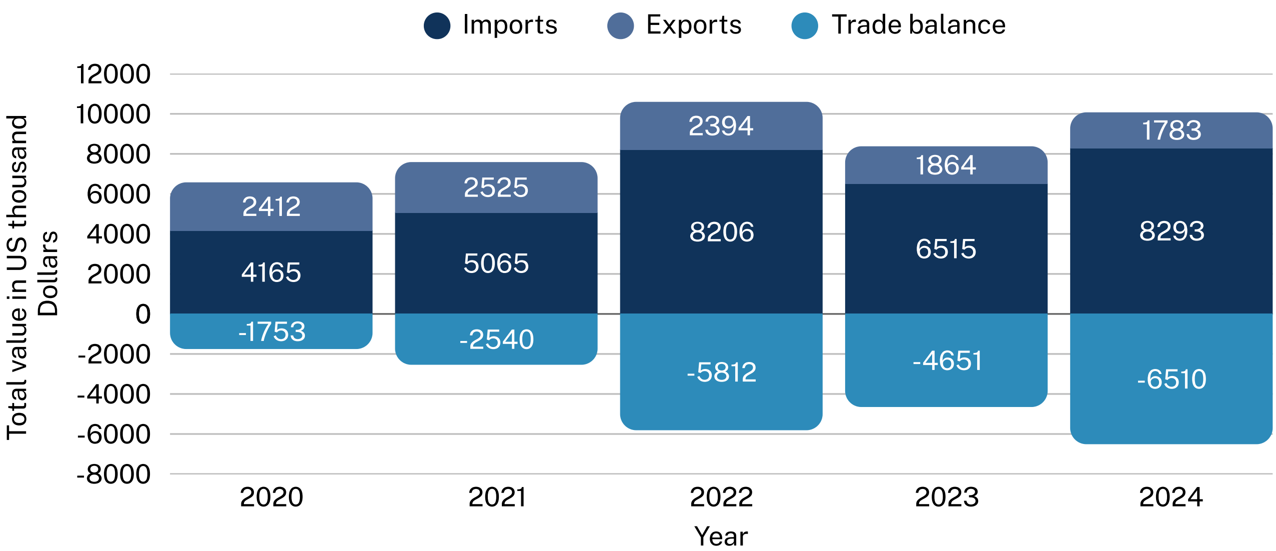
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821191 | Table knives having fixed blades of base metal, incl. handles (excl. butter knives and fish knives)**

Graph 34 - Exports, Imports and Trade balance of the HS Code 821191 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 34 illustrates Spain's trade performance under HS Code 821191 from 2020 to 2024, showing a **consistent trade deficit** throughout the five-year period.

In 2020, imports totaled 4 165 000$, while exports reached 2 412 000$, resulting in a deficit of **1 753 000$**. The deficit widened in 2021, reaching **5 812 000$ in 2022**, as imports rose sharply to 8 206 000$ while exports declined slightly. **In 2023, the trade gap narrowed to 4 651 000$**, but by **2024**, the deficit increased again **peaking at 6 510 000$**, with imports rising and exports falling further.

Overall, the data reflects persistent trade imbalances and a **downward trend in exports**, suggesting another increasing challenges for Spain's international competitiveness.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 27 - Spain's main importing and exporting countries for HS code 821191 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	4 921	3 317	6 085
2. Vietnam	1 332	742	577
3. Germany	199	278	349
4. Portugal	743	581	321
5. France	242	310	313
27. Turkey	-	22 (0.3%)	2 (≈0%)

Source: TradeMap

Table 27 presents Spain's main import partners for HS Code 821191 in 2024, with **China clearly leading**. China exported **6 085 000$** worth of goods to Spain, more than ten times the value of the second-largest supplier, **Vietnam**, which reached **577 000$.**
Germany followed with 349 000$, showing a gradual increase over the three-year period. **Portugal and France ranked fourth and fifth**, with 321 000$ and 313 000$ respectively in 2024. Both countries saw a decline or stagnation in export values compared to previous years. **Turkey, ranked twenty-seventh**, contributed only 2 000$, accounting for nearly **0%** of Spain's total imports in this category.

These figures highlight **China's overwhelming dominance** in Spain's import market for this product, **while other suppliers - especially in Europe - play a much smaller and declining role.**

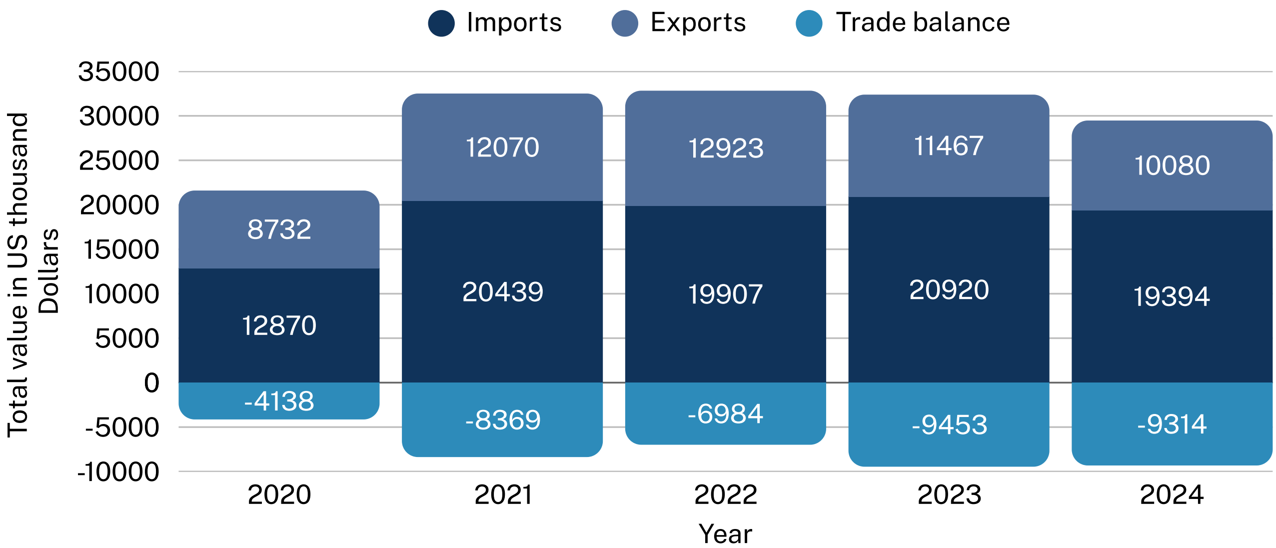
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821192 | Knives with fixed blades of base metal (excl. straw knives, machetes, knives and cutting blades for machines or mechanical appliances, table knives, fish knives, butter knives, razors and razor blades and knives of heading 8214)**

Graph 35 - Exports, Imports and Trade balance of the HS Code 821192 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 35 illustrates Spain's trade performance under HS Code 821192 from 2020 to 2024, marked by a **consistent trade deficit** throughout the period.

In 2020, imports totaled 12 870 000$, while exports reached 8 732 000$, resulting in the **lowest deficit of the period**, **4 138 000$.** The deficit widened in **2021**, reaching **8 369 000$**, as imports rose sharply to 20 439 000$.

Although exports increased slightly in **2022,** the trade gap remained significant at **- 6 984 000$.** In **2023**, the deficit deepened again, peaking at **9 453 000$**, and by **2024**, it remained high at **9 314 000$**, with exports falling to 10 080 000$ and imports to 19 394 000$.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 28 - Spain's main importing and exporting countries for HS code 821192 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	12 217	9 342	9 253
2. Germany	2 465	2 617	3 021
3. France	959	1 448	1 683
4. Hong Kong, China	1	26	1 577
5. Portugal	1 375	1 495	1 095
31. Turkey	1 (≈0%)	0 (≈0%)	3 (≈0%)

Source: TradeMap

In **2024**, China consolidated its dominant position under HS Code 821192, exporting **9 253 000$** worth of goods to Spain - well ahead of all other suppliers.

Germany ranked second, with exports steadily increasing over the three-year period to reach **3 021 000$**. France followed in third place with **1 683 000$**, also showing consistent growth.

A notable development was the rise of **Hong Kong**, which jumped from negligible values in previous years to **1 577 000$** in 2024, placing it just behind France. **Portugal remained among the top suppliers**, although its 2024 export value declined compared to 2023. **Turkey,** ranked thirty-first, was a marginal supplier, contributing a market share close to **0%.**

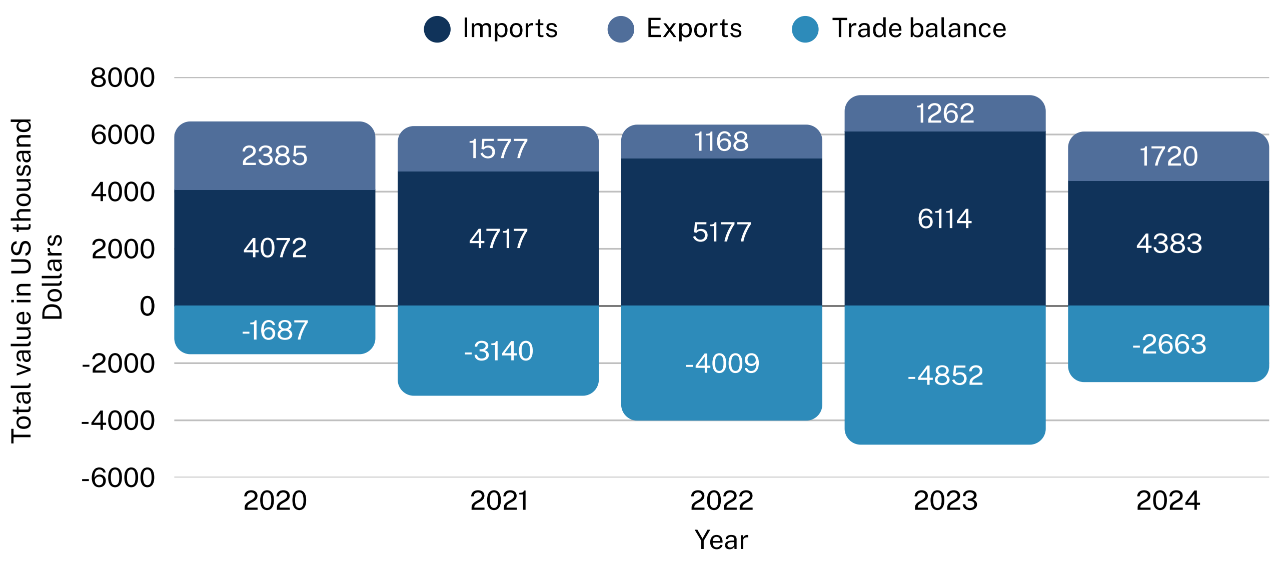
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821510 | Sets of spoons, forks or other articles of heading 8215, which may also contain up to an equivalent number of knives, of base metal, containing at least one article plated with precious metal**

Graph 36 - Exports, Imports and Trade balance of the HS Code 821510 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

The graph outlines Spain's trade dynamics under HS Code 821510 from 2020 to 2024, characterized by a **persistent trade deficit.**

Up to **2023**, imports rose steadily, reaching a peak of **6 114 000$**, while exports declined, **bottoming out in 2022 at 1 168 000$**. This divergence led to the **largest trade deficit** in 2023, totaling **4 852 000$.**

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In 2024, however, the trend began to shift: **exports increased to 1 720 000$** and **imports fell**, narrowing the **trade deficit to 2 663 000$.** This might suggest early signs of recovery in Spain's export performance for this product category.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 29 - Spain's main importing and exporting countries for HS code 821510 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	1 264	2 434	2 111
2. Germany	1 330	1 511	1 281
3. Italy	299	536	307
4. France	1 493	965	255
5. Portugal	287	366	228
27. Turkey	118 (2.3%)	15 (0.2%)	1 (≈0%)

Source: TradeMap

Table 29 highlights Spain's key trading partners for HS Code 821510 in 2024, showing notable shifts in import and export dynamics.

On the import side, **China emerged as Spain's top supplier**, with imports reaching **2 111 000$** in 2024, up significantly from 2022. **Germany followed**, maintaining strong export levels to Spain. **France**, once the leading exporter in 2022, **saw a sharp decline by 2024**, dropping to the fourth place. **Italy and Portugal remained consistent**, with Italy surpassing France in 2024 and Portugal ranking fifth.

Turkey, which ranked 27th, saw its exports to Spain nearly vanish, contributing virtually **0%** in 2024.

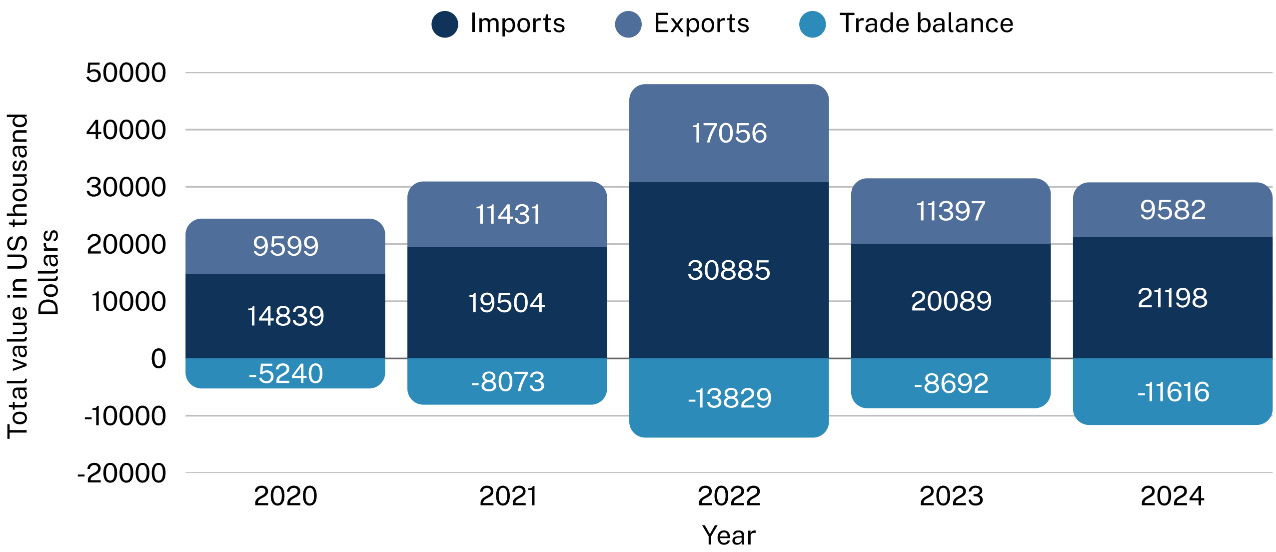
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821520 | Sets consisting of one or more knives of heading 8211 and at least an equal number of spoons, forks or other articles of heading 8215, of base metal, containing no articles plated with precious metal**

Graph 37 - Exports, Imports and Trade balance of the HS Code 821520 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 37 illustrates Spain's **trade deficit** under HS code 821520 between 2020 and 2024.

From 2020 to 2022, both imports and exports increased steadily, with all three indicators - **imports, exports, and the trade deficit - peaking in 2022**. That year, the deficit reached **13 829 000$**, more than double the value recorded in 2020. In **2023**, exports declined, but imports fell even more sharply, resulting in a reduced deficit of **8 692 000$**, marking a temporary improvement. However, in **2024**, the **trade balance deteriorated again** due to a further drop in exports and a slight increase in imports.

Overall, the data reveals a pattern of **volatility** in Spain's trade performance under this category, with significant year-to-year fluctuations in both trade volumes and the deficit.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 30 - Spain's main importing and exporting countries for HS code 821520 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	22 312	12 592	13 268
2. Portugal	2 116	1 726	1 771
3. Vietnam	1 791	1 436	1 730
4. France	926	921	1 379
5. Italy	1 042	884	968
25. Turkey	2 (≈0%)	1 (≈0%)	2 (≈0%)

Source: TradeMap

In Table 30, it is evident that **China consistently ranked as Spain's top supplier** under HS code 821520, maintaining a significant lead over other countries. In 2024, Chinese exports were 7 times higher than those of Portugal, which ranked second. Although China's exports to Spain dropped sharply from **22 312 000$ in 2022** to 12 592 000$ in 2023, they slightly recovered to **13 268 000$ in 2024**. **Portugal and Vietnam followed,** both showing relatively stable export values over the three-year period. **France** also appeared among the top four, with a noticeable **increase** in exports between 2022 and 2024. Completing the top five, **Italy experienced a decline in exports to Spain** during this period. This downward trend in exports was common among the top five suppliers and aligns with the overall pattern observed in the previous graph. Lastly, **Turkey, ranked twenty-fifth**, maintained its 2022 export value in 2024, with a market share close to **0%.**

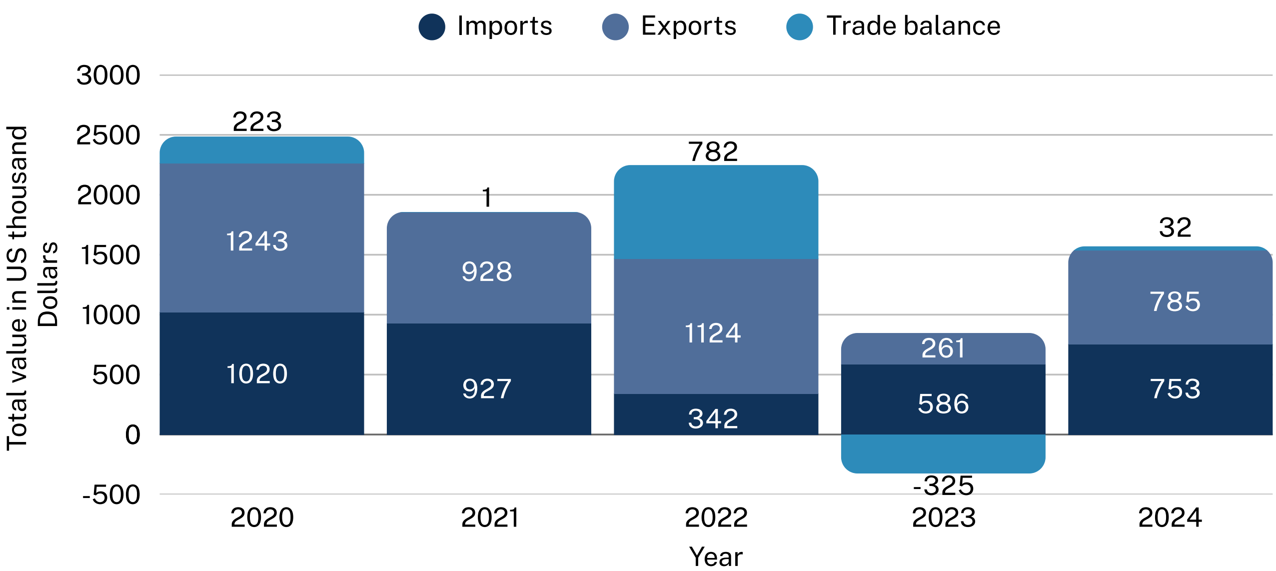
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821591 | Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware of base metal, plated with precious metal (excl. sets of articles such as lobster cutters and poultry shears)**

Graph 38 - Exports, Imports and Trade balance of the HS Code 821591 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 38 highlights the **volatility in Spain's trade performance** between 2020 and 2024. In **2020**, the year with the highest trade volumes during the period, Spain recorded a **positive trade balance**, with exports reaching 1 243 000$ and imports 1 020 000$, resulting in a surplus of **223 000$**. In **2021**, both exports and imports declined, but exports fell more sharply, leading to a **nearly balanced trade account**, with a modest surplus of 1 000$. In **2022**, exports rose slightly to 1 124 000$, while imports dropped significantly, resulting in the **largest trade surplus of the period, at 782 000$**. However, in **2023**, the trade balance turned negative due to a fourfold decrease in exports compared to the previous year, coupled with an increase in imports, leading to a deficit of **325 000$**. In **2024**, both exports and imports increased, with exports once again surpassing imports, resulting in a **surplus of 32 000$**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 31 - Spain's main importing and exporting countries for HS code 821591 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	59	118	449
2. France	49	84	107
3. Germany	88	145	59
4. USA	18	9	42
5. Italy	57	94	34
24. Turkey	0 (≈0%)	-	-

Source: TradeMap

In **2022**, **Germany led the group that would form the 2024 top five**, with exports to Spain totaling 88 000$, followed closely by Italy (57 000$) and France (49 000$). However, by 2024, the ranking had shifted significantly. **China emerged as Spain's top supplier** under this HS code, with exports rising sharply from 59 000$ in 2022 to **449 000$ in 2024** - a **more than sevenfold increase.**

France maintained a steady upward trend, reaching 107 000$ in 2024, while **Germany experienced a decline** after peaking in 2023. The **USA** showed signs of **recovery in 2024**, with 42 000$ in exports following a dip in the previous year. In contrast, **Italy followed a downward trajectory**, falling from 94 000$ in 2023 to 34 000$ in 2024. **Turkey, ranked 24th** in 2022, contributed insignificantly to Spain's imports, with a value close to **0%**, which **disappeared entirely** in 2023 and 2024.

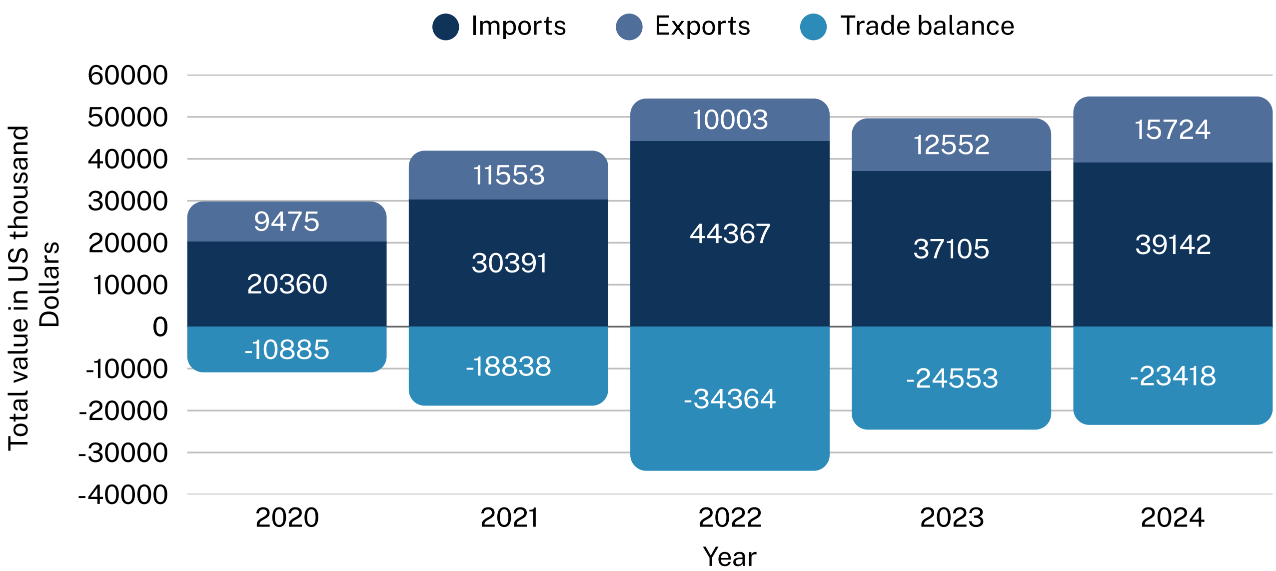
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 821599 | Spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter-knives, sugar tongs and similar kitchen or tableware of base metal, not plated with precious metal (excl. sets of articles such as lobster cutters and poultry shears)**

Graph 39 - Exports, Imports and Trade balance of the HS Code 821599 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 39 illustrates Spain's trade performance under HS code 821599 between 2020 and 2024, marked by a **persistent trade deficit** throughout the period.

In **2020**, imports totaled 20 360 000$, while exports reached 9 475 000$, resulting in a trade deficit of **10 885 000$**. The deficit widened in **2021**, as imports rose more than exports, leading to a **larger deficit of 18 838 000$.** The situation worsened in **2022,** when imports peaked at 44 367 000$, while exports slightly declined to 10 003 000$, pushing the trade deficit to **34 364 000$**. In **2023**, exports recovered and imports fell, **reducing the deficit to 24 553 000$.** In **2024**, exports continued to grow, reaching **15 724 000$**, while imports rose modestly to **39 142 000$**, resulting in a slightly improved deficit of **23 418 000$**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 32 - Spain's main importing and exporting countries for HS code 821599 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	26 273	19 231	18 733
2. France	2 698	3 290	7 768
3. Germany	4 138	4 295	3 592
4. Italy	2 749	2 832	2 649
5. Portugal	2 535	2 440	1 837
31. Turkey	1 (≈0%)	64 (0.2%)	4 (≈0%)

Source: TradeMap

Throughout the period, **China consistently ranked as Spain's top supplier**, although its exports to Spain declined from 26 273 000$ in 2022 to **18 733 000$ in 2024**. Despite this drop, **China maintained a significant lead over other countries. France showed remarkable growth**, with exports increasing from 2 698 000$ in 2022 to 7 768 000$ in 2024 - **nearly tripling** over the period. This positioned France as the second-largest exporter to Spain in 2024.

Germany remained relatively stable, with values fluctuating slightly and ending at 3 592 000$ in 2024. Italy and Portugal, ranked fourth and fifth respectively. **Italy showed minor variations**, slightly declining to 2 649 000$, and **Portugal** declining from 2 535 000$ to **1 837 000$. Turkey, ranked 31st**, contributed insignificantly to Spain's imports, with values close to **0%** throughout the period - 1 000$ in 2022, 64 000$ in 2023, and 4 000$ in 2024.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

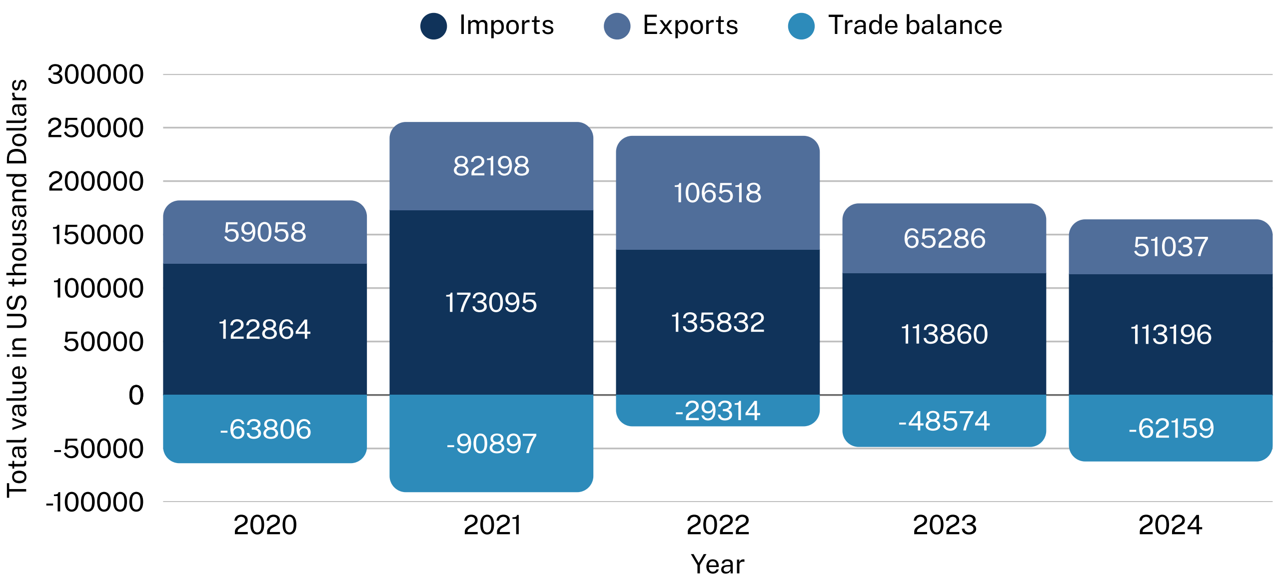
2.1. Market Size & Growth

Category: Small Electric Kitchen and House Appliances

Total value of imports (2024) - 1 399 731 000$

- **HS 850940 | Domestic food grinders and mixers and fruit or vegetable juice extractors, with self-contained electric motor**

Graph 40 - Exports, Imports and Trade balance of the HS Code 850940 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 40 illustrates Spain's trade performance under HS code 850940 between 2020 and 2024, showing a **consistent trade deficit** throughout the period. In **2020**, imports totaled **122 864 000$**, while exports reached **59 058 000$**, resulting in a trade deficit of **63 806 000$**. The **deficit widened in 2021**, as imports rose to 173 095 000$ and exports to 82 198 000$, leading to a larger deficit of **90 897 000$**. In **2022**, the **trade gap narrowed significantly**, with exports increasing to **106 518 000$** and imports falling to **135 832 000$**, resulting in the **lowest deficit of the period:** 29 314 000$. However, in **2023**, exports dropped more than imports pushing the deficit back up to **48 574 000$**. By **2024**, exports fell further to 51 037 000$, and imports remained relatively stable at 113 196 000$, resulting in a trade deficit of **62 159 000$**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 33 - Spain's main importing and exporting countries for HS code 850940 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	101 517	81 837	82 764
2. Romania	1 370	7 133	7 422
3. Slovenia	6 618	4 293	5 402
4. France	2 655	4 800	4 060
5. Germany	5 856	4 128	2 793
27. Turkey	6 (≈0%)	31 (≈0%)	21 (≈0%)

Source: TradeMap

Throughout the period, **China remained by far the dominant supplier**, with exports to Spain totaling 101 517 000$ in 2022, 81 837 000$ in 2023, and **82 764 000$ in 2024** - maintaining a strong lead over all other countries. **Romania showed a remarkable increase**, rising from 1 370 000$ in 2022 to 7 422 000$ in 2024, securing the second position. **Slovenia and France followed**, with Slovenia reaching 5 402 000$ and France 4 060 000$ in 2024, despite some fluctuations over the years.

Germany, which had higher values in 2022 (5 856 000$), **saw a decline**, dropping to 2 793 000$ in 2024. Meanwhile, **Turkey, ranked 27th**, contributed insignificantly to Spain's imports, with values close to **0%** throughout the period - 6 000$ in 2022, 31 000$ in 2023, and 21 000$ in 2024.

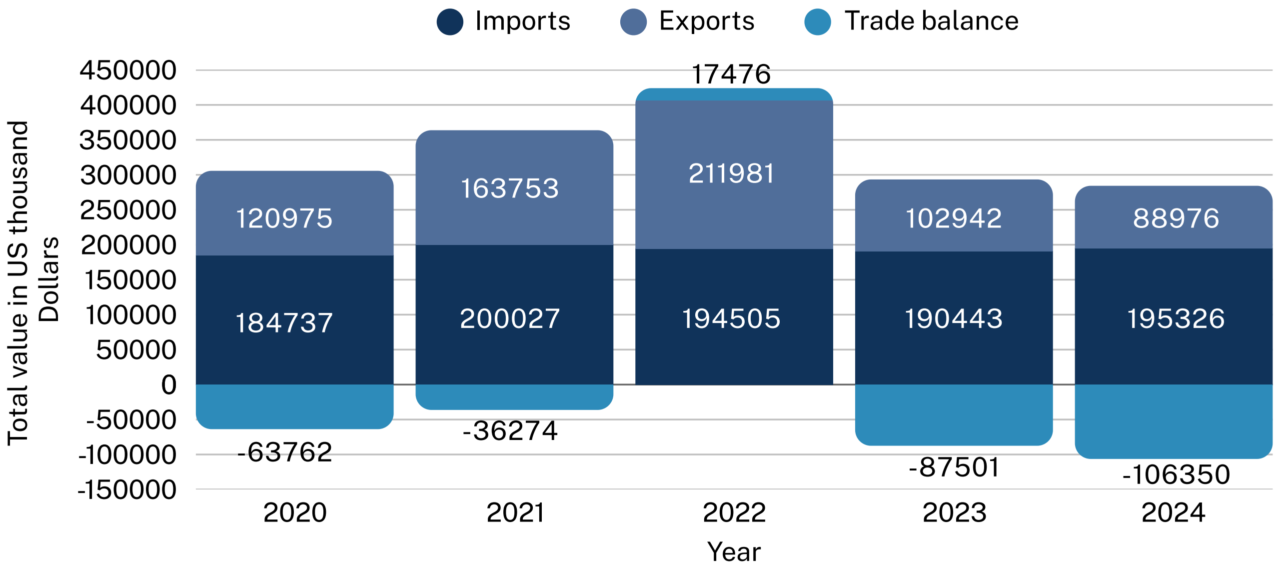
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 850980 | Electromechanical domestic appliances, with self-contained electric motor (excl. vacuum cleaners, dry and wet vacuum cleaners, food grinders and mixers, fruit or vegetable juice extractors, and hair-removing appliances)**

Graph 41 - Exports, Imports and Trade balance of the HS Code 850980 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 41 outlines Spain's trade performance for HS Code 850980 between 2020 and 2024, marked by a generally **persistent trade deficit**. In **2020**, imports reached approximately 184 737 000$, while exports totaled 120 975 000$, resulting in a trade deficit of **63 762 000$**. From 2020 to 2022, both imports and exports showed an upward trend. In **2022**, exports surpassed imports for the first time, generating a **trade surplus of 17 476 000$**. However, this positive shift was short-lived. By **2024**, the situation had deteriorated: exports declined, while imports rose, culminating in the **largest trade deficit of the period**.

Overall, despite the temporary surplus in 2022, the increase in imports coupled with the decline in exports by 2024 **suggests that the negative trend in Spain's trade balance is likely to persist**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 34 - Spain's main importing and exporting countries for HS code 850980 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	81 948	67 319	79 524
2. Germany	36 693	32 032	29 729
3. Netherlands	1 756	14 757	24 942
4. Malasya	28 880	20 983	14 717
5. Hungary	6 060	17 937	12 094
27. Turkey	41 (≈0%)	14 (≈0%)	55 (≈0%)

Source: TradeMap

On the import side, **China emerged as Spain's top supplier**, with imports reaching **79 524 000$** in 2024, recovering from a dip in 2023 and accounting for **over a third of Spain's total imports in this category. Germany followed**, with 29 729 000$, showing a gradual decline over the three-year period. The **Netherlands saw a sharp rise**, increasing from 1 756 000$ in 2022 to 24 942 000$ in 2024, indicating a growing trade relationship.

On the other hand, **Malaysia** and **Hungary**, once more prominent suppliers, **experienced a decline** in export values to Spain from 2023 to 2024. However, Hungary increased significantly the exports to Spain since 2022. **Turkey, ranked 27th**, contributed minimally, with only 55 000$ in 2024, **maintaining a negligible share of total imports**.

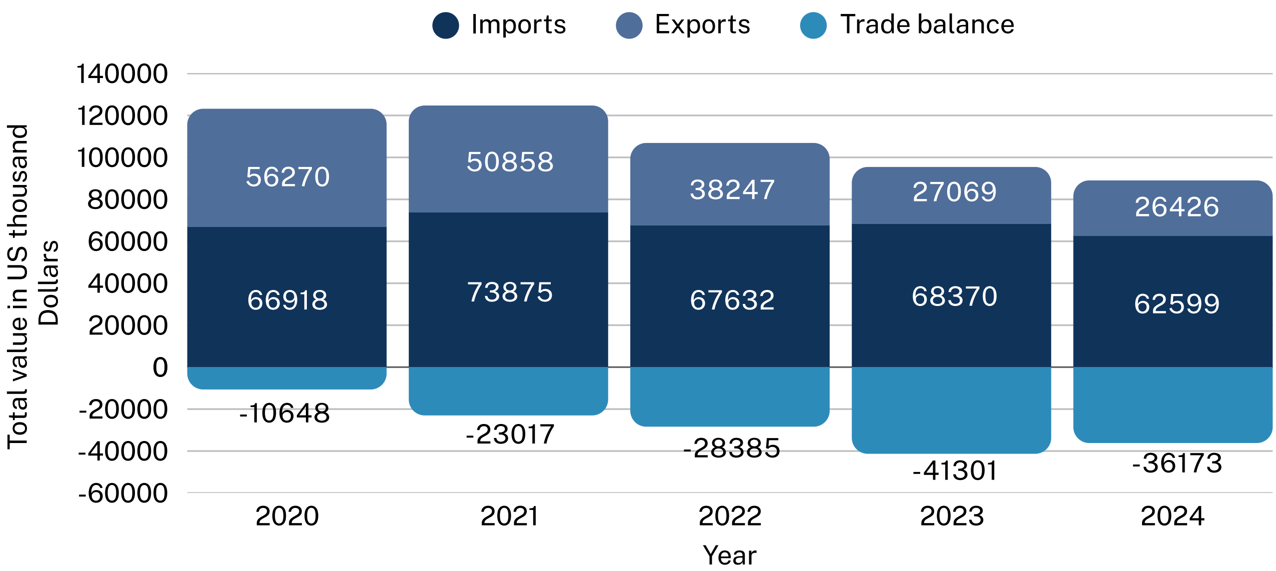
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 851640 | Electric smoothing irons**

Graph 42 - Exports, Imports and Trade balance of the HS Code 851640 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 42 outlines Spain's trade performance for HS Code 851640 between 2020 and 2024, characterized by a **persistent and worsening trade deficit.**

In **2020**, imports totaled **66 918 000$**, while exports reached **56 270 000$**, resulting in a trade deficit of **10 648 000$.** Over the following years, **exports steadily declined**, dropping to 26 426 000$ by 2024. **Imports, on the other hand, remained relatively stable**, fluctuating slightly but ending at 62 599 000$ in 2024. This led to the **largest trade deficit of the period**, amounting to **36 173 000$**.

Overall, the consistent decline in exports combined with stable import levels **suggests a deteriorating trade position for Spain in this product category**, with no clear signs of recovery by 2024.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 35 - Spain's main importing and exporting countries for HS code 851640 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	35 635	35 031	38 011
2. France	15 806	21 350	15 823
3. Indonesia	2 705	4 619	5 514
4. Germany	6 206	1 619	1 182
5. Italy	5 420	2 762	859
14. Turkey	62 (0.1%)	5 (≈0%)	40 (0.1%)

Source: TradeMap

China was the dominant supplier, with imports reaching **38 011 000$ in 2024**, maintaining a consistent lead over the three-year period. **France**, which had peaked in 2023 at 21 350 000$, saw a decline to **15 823 000$ in 2024**, returning to its 2022 levels.

Indonesia, ranked third, showed steady growth, increasing its exports to Spain from 2 705 000$ in 2022 to **5 514 000$ in 2024**, suggesting a strengthening trade relationship. In contrast, **Germany experienced a sharp decline**, dropping from 6 206 000$ in 2022 to just **1 182 000$ in 2024**.

In 2024, **Italy's** exports to Spain were six times lower than in 2022, reflecting a **sharp decline**. Although **Turkey's** export values also decreased, the country **maintained its marginal market share of 0.1%**.

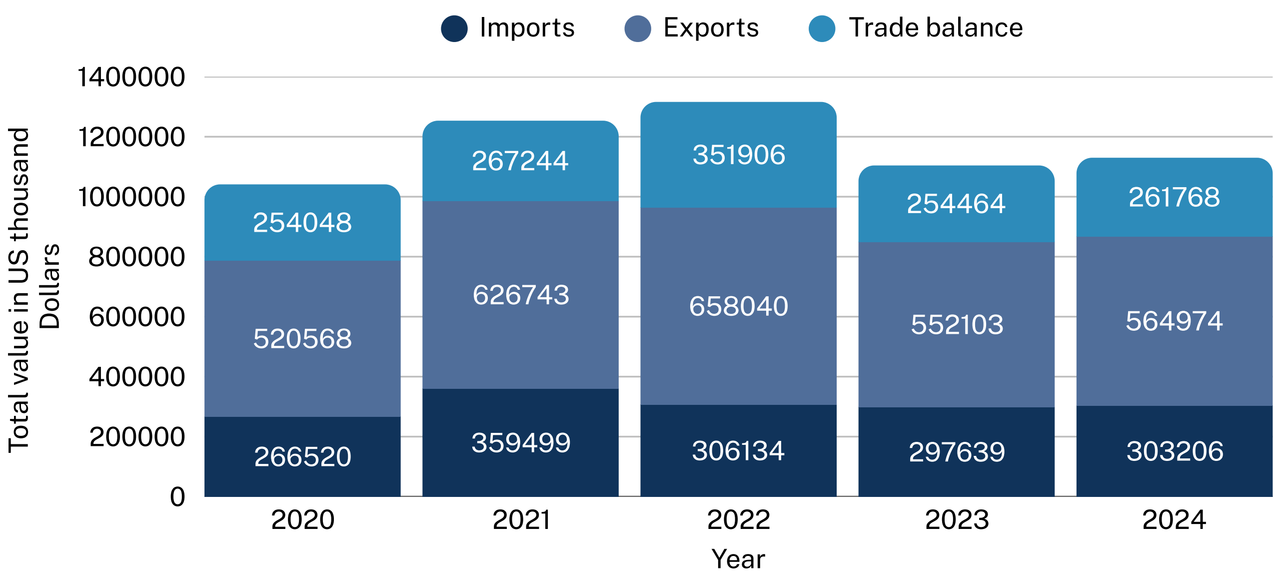
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 851660 | Electric ovens, cookers, cooking plates and boiling rings, electric grillers and roasters, for domestic use (excl. space-heating stoves and microwave ovens)**

Graph 43 - Exports, Imports and Trade balance of the HS Code 851660 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 43 illustrates Spain's trade performance for HS Code 851660 over the 2020–2024 period, consistently marked by a **positive trade balance**. In **2020**, imports totaled 266 520 000$, while exports reached 520 568 000$, resulting in a trade surplus of **254 048 000$**. In 2021, the trade outlook improved further. Exports rose significantly, while imports increased more moderately, peaking at 359 499 000$. This led to a slightly higher trade surplus of **267 244 000$**.

The year **2022** marked the **highest trade surplus of the period**, reaching **351 906 000$**, driven by a peak in exports and a decline in imports. In **2023** and **2024**, the trade surplus declined, returning to levels similar to those seen in 2020 and 2021, indicating a **stabilization in trade dynamics**.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 36 - Spain's main importing and exporting countries for HS code 851660 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	92 144	91 446	90 645
2. Turkey	65 105 (21.3%)	66 391 (22.3%)	74 019 (24.4%)
3. Germany	66 239	57 309	55 379
4. Italy	32 916	28 637	28 430
5. Poland	15 346	16 189	19 752

Source: TradeMap

On the import side, like in many other HS codes, **China remained the leading supplier**, with values holding relatively steady over the three-year period - reaching 90 645 000$ in 2024.

Turkey followed closely, showing consistent growth from 65 105 000$ in 2022 to **74 019 000$ in 2024**, increasing its share to **24.4%** of Spain's total imports in this category.

Germany, once a top supplier, saw a gradual decline, dropping from 66 239 000$ in 2022 to **55 379 000$ in 2024**. **Italy also experienced a slight decrease**, while **Poland** showed a modest but steady increase, reaching **19 752 000$ in 2024**.

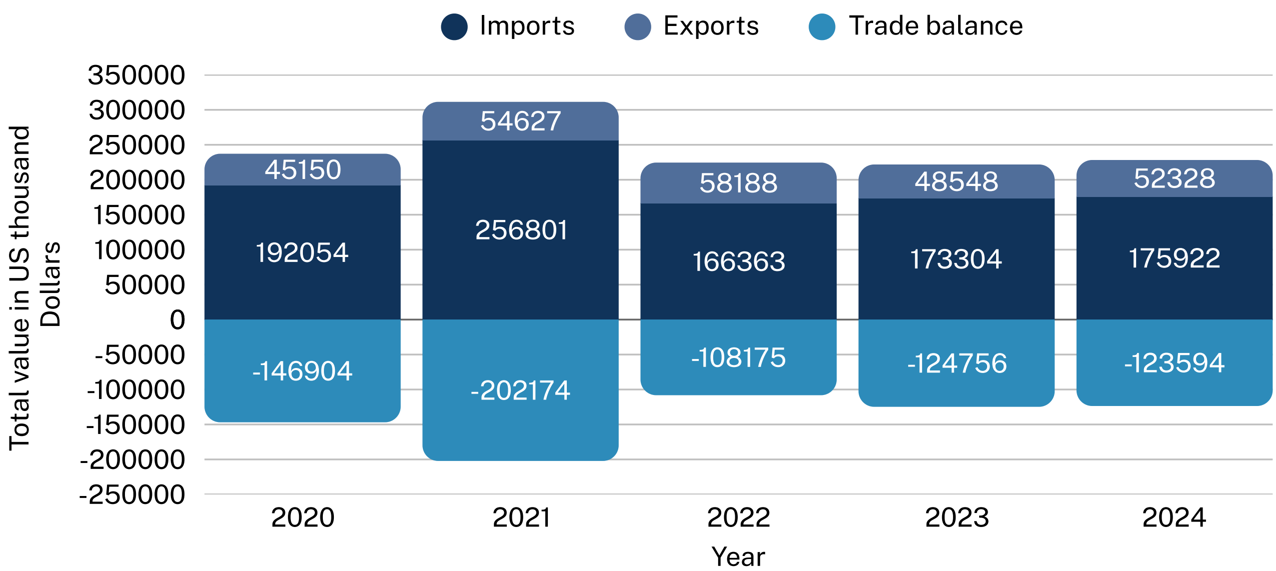
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 851671 | Electro-thermic coffee or tea makers, for domestic use**

Graph 44 - Exports, Imports and Trade balance of the HS Code 851671 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 44 illustrates Spain's trade performance for HS Code 851671 over the five-year period from 2020 to 2024, consistently marked by a **trade deficit**. In **2020**, imports totaled 192 054 000$, while exports reached only 45 150 000$, resulting in a trade deficit of **146 904 000$**. The **deficit widened in 2021**, as imports surged to **256 801 000$**, while exports increased only slightly to 54 627 000$, leading to the **largest trade deficit** of the period.

In **2022**, the trade balance improved significantly. Imports dropped, while exports rose, reducing the deficit to **108 175 000$** - the **lowest of the five years**. However, in **2023** and **2024**, the **trade deficit widened again** slightly. Imports rose to 173 304 000$ and 175 922 000$ respectively, while exports declined to 48 548 000$ in 2023 and modestly recovered to 52 328 000$ in 2024. The resulting deficits were **124 756 000$** and **123 594 000$**, respectively.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 37 - Spain's main importing and exporting countries for HS code 851671 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	43 951	49 724	59 480
2. Romania	12 842	29 474	32 073
3. Indonesia	11 978	15 424	18 303
4. Ukraine	6 388	14 173	13 936
5. Belgium	11 091	9 799	10 831
24. Turkey	13 (≈0%)	5 (≈0%)	22 (≈0%)

Source: TradeMap

China remained Spain's leading supplier, with imports rising steadily from 43 951 000$ in 2022 to **59 480 000$ in 2024** - an increase of over **35%, reinforcing its dominant position. Romania** experienced the most significant growth, with imports more than doubling from 12 842 000$ in 2022 to **32 073 000$ in 2024**. This sharp rise allowed Romania to become Spain's second-largest supplier. **Indonesia** also saw consistent growth, with exports to Spain increasing from 11 978 000$ in 2022 to **18 303 000$ in 2024** - an increase of over 50%. **Ukraine followed a similar trend**, with imports more than doubling between 2022 and 2023, before stabilizing at **13 936 000$ in 2024.**

In contrast, **Belgium's exports remained relatively stable** compared to 2022, reaching 10 831 000$ in 2024. Meanwhile, **Turkey, ranked 24th**, continued to play a minimal role in Spain's imports, contributing approximately **0%** to the total.

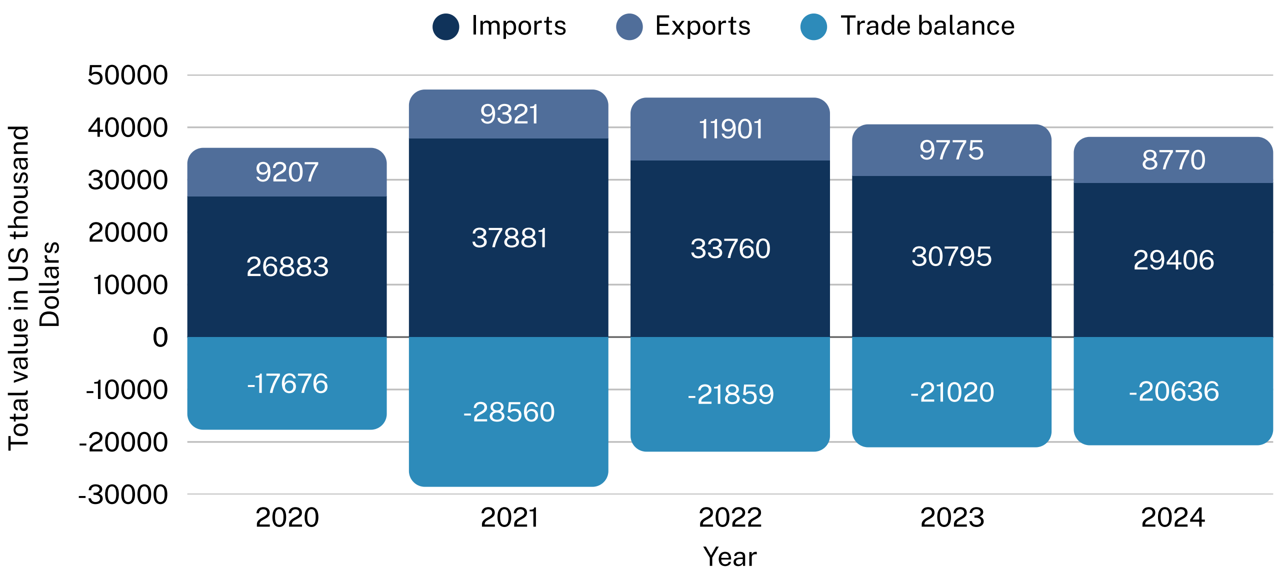
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 851672 | Electric toasters, for domestic use**

Graph 45 - Exports, Imports and Trade balance of the HS Code 851672 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 45 outlines Spain's trade performance for HS Code 851672 between 2020 and 2024, consistently marked by a **trade deficit** throughout the five-year period.

In **2020**, imports totaled 26 883 000$, while exports reached 9 207 000$, resulting in a trade deficit of **17 676 000$.** In **2021**, imports rose sharply to 37 881 000$, imports' highest value, while exports remained nearly flat at 9 321 000$, **widening the deficit to 28 560 000$**, the **highest of the period.** In **2022**, the trade balance improved slightly as exports increased to 11 901 000$ and imports declined to 33 760 000$, reducing the deficit to **21 859 000$.** This trend continued in **2023**, with imports falling further to 30 795 000$ and exports decreasing to 9 775 000$, resulting in a **slightly lower deficit of 21 020 000$.** By **2024**, imports dropped again to 29 406 000$, but exports also declined to 8 770 000$, **keeping the trade deficit relatively stable** at 20 636 000$.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 38 - Spain's main importing and exporting countries for HS code 851672 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	28 050	25 803	25 078
2. Italy	2 495	1 531	1 342
3. France	595	855	835
4. Germany	1 063	934	771
5. Portugal	552	466	527
8. Turkey	12 (≈0%)	38 (0.1%)	130 (0.4%)

Source: TradeMap

Under HS code 851672, **China remained the dominant supplier**, with import values declining slightly from 28 050 000$ in 2022 to 25 078 000$ in 2024, yet still accounting for the majority of Spain's imports in this category. In second place, **Italy's exports were more than 18 times lower than China's**, and continued to decline steadily - from 2 495 000$ to 1 342 000$, representing a drop of nearly 50% over the period.

France and Germany followed, with relatively modest figures. France's exports remained stable, closing at 835 000$ in 2024, while Germany's declined from 1 063 000$ to 771 000$. **Portugal's exports remained relatively stable in 202**4, meanwhile, **Turkey, ranked 8th**, maintained a minimal role in Spain's import market, with exports decreasing to 130 000$ in 2024 - equivalent to just **0.4%** of total imports.

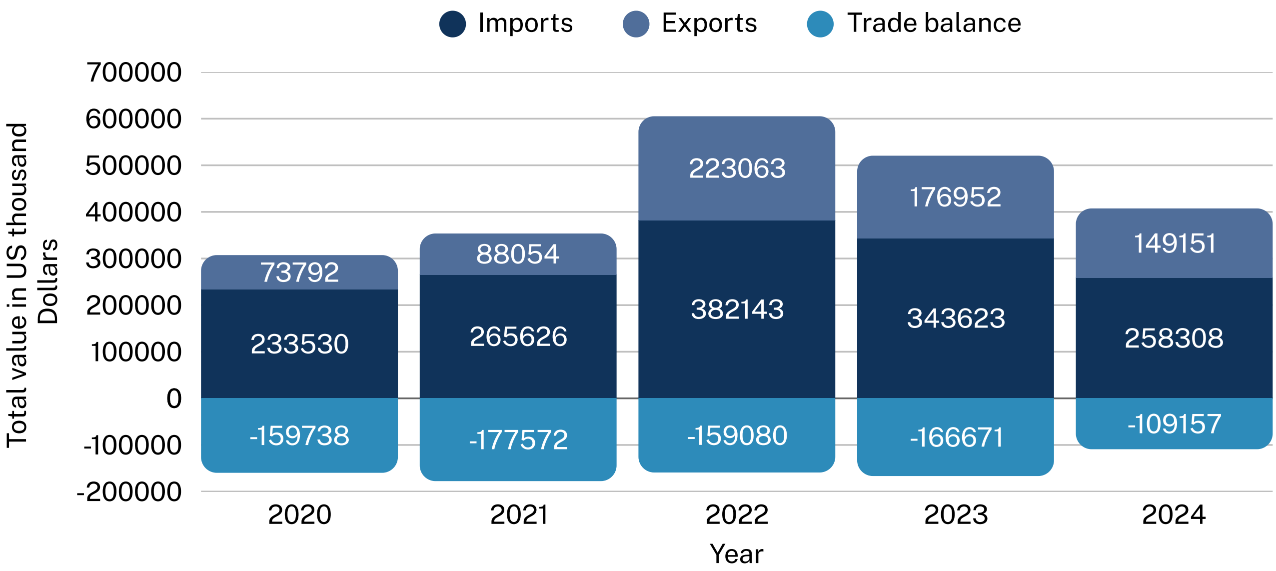
Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

- **HS 851679 | Electro-thermic appliances, for domestic use (excl. hairdressing appliances and hand dryers, space-heating and soil-heating apparatus, water heaters, immersion heaters, smoothing irons, microwave ovens, ovens, cookers, cooking plates, boiling rings, grillers, roasters, coffee makers, tea makers and toasters)**

Graph 46 - Exports, Imports and Trade balance of the HS Code 851679 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 46 illustrates Spain's trade performance for HS Code 851679 over the 2020–2024 period, consistently marked by a **trade deficit**, though with signs of improvement in recent years. In **2020**, imports totaled 233 530 000$, while exports reached 73 792 000$, resulting in a trade deficit of **159 738 000$**. The deficit widened in **2021**, as imports rose more than exports, pushing the deficit to **177 572 000$.** In 2022, exports surged to 223 063 000$, while **imports also peaked at 382 143 000$**, resulting in a slightly reduced deficit of **159 080 000$.** However, in **2023**, both imports and exports declined, with the trade deficit increasing again to **166 671 000$**. By **2024, the trade balance showed notable improvement.** Imports dropped significantly, while exports, although lower than the previous year, remained relatively strong at 149 151 000$. This led to the **lowest trade deficit of the period.**

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 39 - Spain's main importing and exporting countries for HS code 851679 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	309 508	281 916	194 999
2. France	24 171	23 542	32 821
3. Germany	21 346	14 667	9 211
4. Netherlands	9 020	7 040	6 543
5. Italy	6 825	4 503	3 181
16. Turkey	251 (0.1%)	175 (0.1%)	190 (0.1%)

Source: TradeMap

Between 2022 and 2024, **China clearly led as Spain's primary supplier** under HS code 851679, **although its export values declined by nearly 37%** over the period - from 309 508 000$ in 2022 to 194 999 000$ in 2024. Despite this substantial drop, **China's exports in 2024 were still nearly eight times higher than those of France**, the second-largest supplier.

France's figures remained relatively stable, decreasing only slightly from 24 171 000$ in 2022 to 23 542 000$ in 2023 - a drop of about 2.6%. However, in 2024 recorded **32 821 000$**. **Germany, the Netherlands, and Italy followed** with 9 211 000$, 6 543 000$, and 3 181 000$ respectively. **Turkey** contributed only 190 000$, highlighting its **marginal role** in Spain's import market for this product category.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

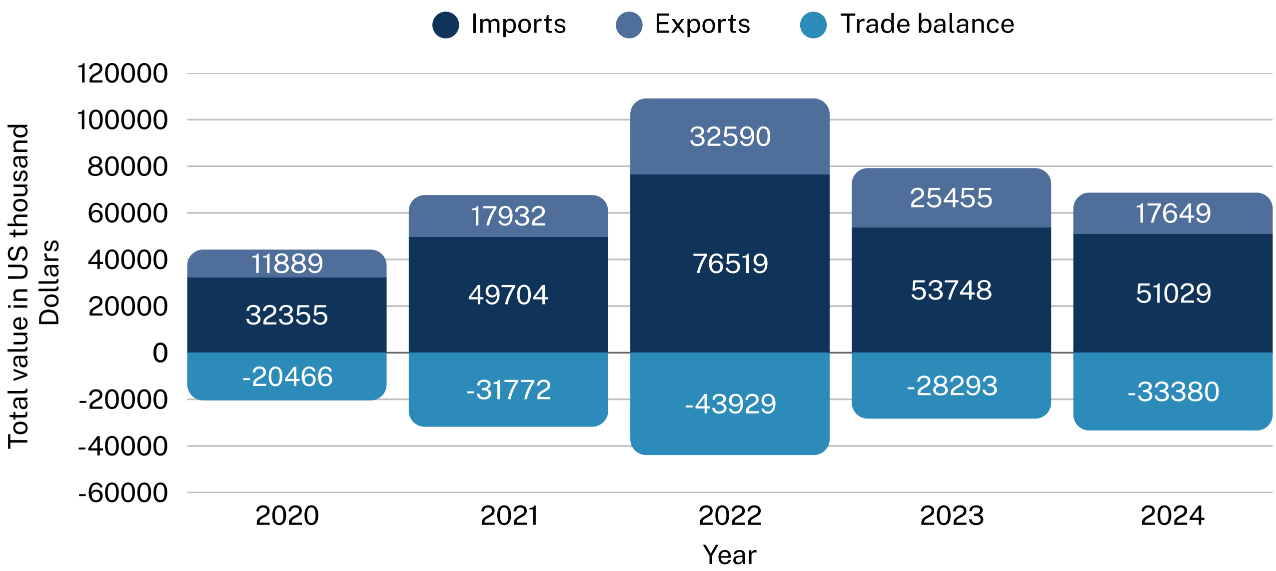
2.1. Market Size & Growth

Category: Wood Kitchenware & Houseware

Total value of imports (2024) - 51029$

- **HS 4419 | Tableware and kitchenware, of wood (excl. interior fittings, ornaments, coopers' products, tableware and kitchenware components of wood, brushes, brooms and hand sieves)**

Graph 47 - Exports, Imports and Trade balance of the HS Code 4419 (2020-2024) - Spain



Source: TradeMap - 1 | 2 | 3

Graph 47 illustrates Spain's trade performance for HS Code 4419 over the five-year period from 2020 to 2024, consistently marked by a **trade deficit.**

The **deficit peaked in 2022** at **43 929 000$**, driven by a **sharp rise in imports**. Although both imports and exports declined in **2023,** the **trade gap narrowed**. However, in **2024**, exports fell again while imports remained relatively high, **pushing the deficit back up to 33 380 000$**. Despite some fluctuations, **the overall trend remained negative**, with no sustained improvement in the trade balance by the end of the period.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Table 40 - Spain's main importing and exporting countries for HS code 4419 (2024)

Imports by Spain (in thousand USD)			
Country (ranking 2024)	**2022**	**2023**	**2024**
1. China	52 779	33 508	30 336
2. Germany	6 520	6 162	6 325
3. Netherlands	5 107	4 600	4 563
4. India	4 248	1 341	2 171
5. France	773	1 126	1 915
24. Turkey	357 (0.5%)	145 (0.3%)	69 (0.1%)

Source: TradeMap

In 2022, **China was the top exporter to Spain and remained as the dominant source** in 2024. Although its export value to Spain declined from 52 779 000$ in 2022 to **30 336 000$ in 2024**. Despite this drop, China still accounted for a significant share of Spain's total imports in this category.

Germany held steady in second place, with imports slightly increasing to **6 325 000$** in 2024. The **Netherlands followed closely**, maintaining a stable contribution of around **4 563 000$. India** showed a modest recovery, increasing its exports to Spain from 1 341 000$ in 2023 to **2 171 000$ in 2024**. **France**, while lower in rank, **saw a consistent rise over the three years**, reaching 1 915 000$ in 2024.

Turkey, ranked 24th, experienced a sharp decline in export values, dropping from **0.5%** market share in 2022 to just **0.1%** in 2024.

Source: TradeMap - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.1. Market Size & Growth

Building on the previous information, the following section summarizes the **key import categories and top HS codes** for kitchenware and houseware in Spain, both globally and from Turkey.

Graph 48 - Distribution of the top 10 HS Codes most imported into Spain, globally (2024)

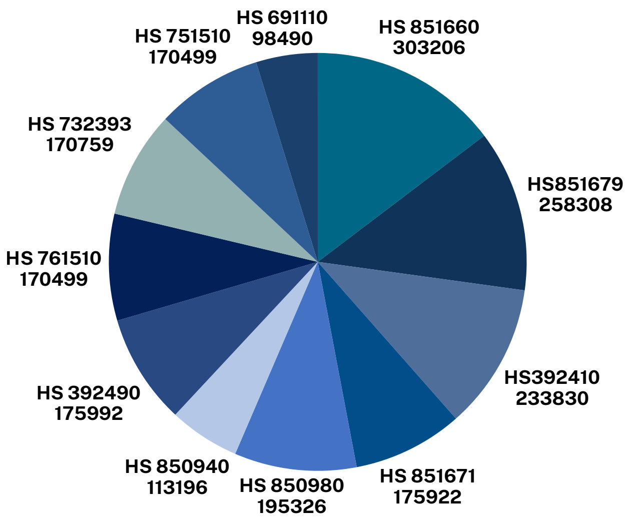


Table 41 - Top 3 most imported categories by Spain, globally (2024)

Top 3 most imported categories by Spain	Value [2024]*
1. Small Electric Kitchen and House Appliances	1 399 731 000$
2. Metal Kitchenware & Houseware	634 168 000$
3. Plastic Kitchenware & Houseware	409 822 000$

*Category values vary based on the number of HS codes included.

Table 42 - Top 5 most imported HS Codes by Spain, from Turkey (2024)

Top 5 most imported HS Codes by Spain, from Turkey	Value [2024]**
1. HS 851660	2nd. 74 019 000$
2. HS 701337	1st. 15 134 000$
4. HS 732111	1st. 12 794 000$
5. HS 691110	2nd. 12 354 000$
5. HS 392410	7th. 11 009 000$

Based on the data presented, the **HS Code 851660 - Electric ovens, cookers, grills, and similar domestic appliances (excluding space-heating stoves and microwaves)** - stands out within the Small Electric Kitchen and House Appliances category as the **top import into Spain, both globally and from Turkey**. In this type of product, Turkey was the second largest exporter, with 74 019 000$ in 2024.

**Turkey's rank as an exporter to Spain is shown next to each value.

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

Product segmentation plays a crucial role in understanding the structure and dynamics of the kitchenware and houseware market in Spain. As consumer expectations diversify and lifestyles evolve, the market is **no longer defined by a one-size-fits-all approach**. Instead, segmentation helps identify how products align with distinct usage occasions, purchasing motivations, and value perceptions.

In this context, this section provides a broad overview of how the market is organized across **functional, aesthetic, and behavioral dimensions**. Segmentation is influenced by factors such as price sensitivity, frequency of use, material preference, and the emotional or practical role products play within the home. By analyzing how products are positioned and perceived across the market, stakeholders can better anticipate **demand patterns**, **tailor innovation strategies**, and **strengthen competitive positioning**.

1. Homewares (dining and kitchen)

a) Dining, which includes *beverageware*, *cutlery*, and *dinnerware.*

- **Beverageware**, including *glasses, mugs, and cups*.

This remained the strongest performer in 2024, with sales reaching **336.4 million* USD** (296.9 million €). This subcategory recorded a 1.2% year-on-year growth and a compound annual growth rate (CAGR) of 2.5% between 2019 and 2024. Its demand continues to be driven by high replacement rates and rising interest in stylish, reusable glassware, influenced by sustainability awareness and social media aesthetics.

*Conversion carried out on May 23, 2025, at an exchange rate of 1 EUR = 1,134 USD (WISE)

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

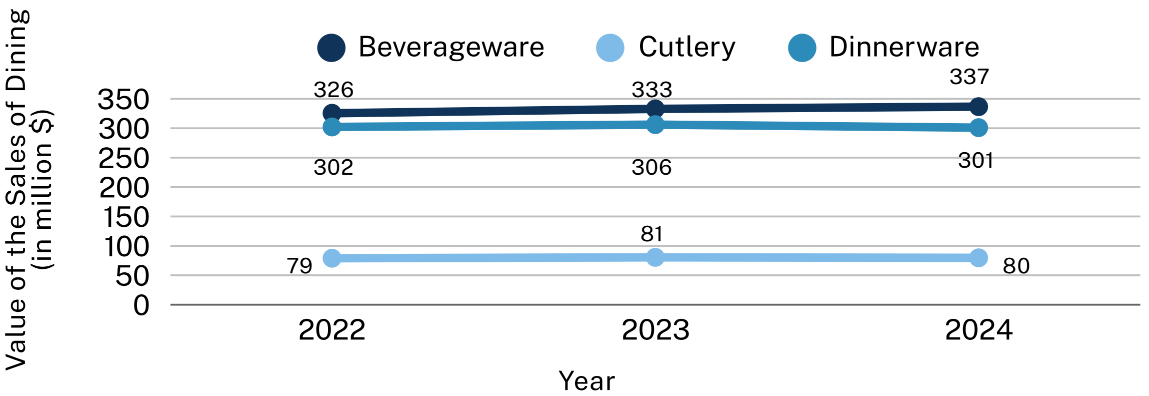
- **Cutlery,** which includes *forks, knives, and spoons*.

This category reached **79.6 million* USD** (70.3 million €) in 2024. Despite a -1.0% annual decline, it maintained a CAGR of 2.1% over the same period, largely supported by its essential nature and need for regular replacement.

- **Dinnerware**, comprising *plates, bowls, and serving sets*.

Category that generated **300.8* million USD** (265.4 million €) in sales. It saw a 1.7% decline in 2024, and a slower CAGR of 1.0% from 2019 to 2024, although it continues to be valued not only for utility but increasingly for its decorative appeal in home entertaining contexts.

Graph 49 - Sales of Dining by Category: Value in million $ (2021-2023) - Spain



Source: Euromonitor - Complete Study

b) **Kitchen category**, divided into *cookware and kitchenware*.

- **Cookware**, icluding *stove top cookware, such as pots and pans*.

It remained the leading subcategory, with **327.9 million* USD** in sales in 2024, experiencing a -0.1% year-on-year variation and recorded a **CAGR of 2.0% from 2019 to 2024**, and maintaining its importance in daily meal preparation despite some market stagnation.

*Conversion carried out on May 23, 2025, at an exchange rate of 1 EUR = 1,134 USD (WISE)

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

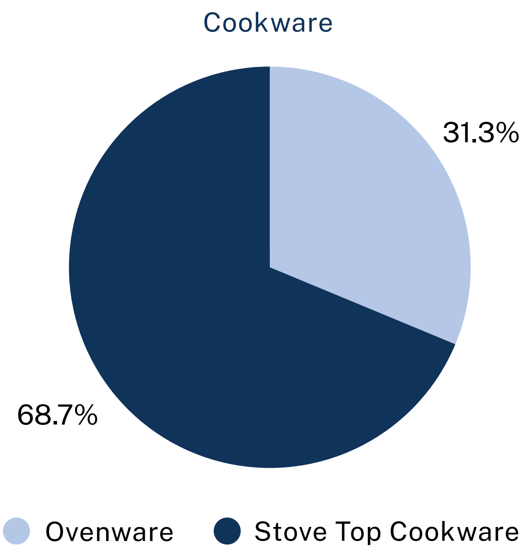
Ovenware, including baking dishes and trays, reached **149.2 million* USD**, marking a further -0.8% decline from 2023, with a CAGR of -0.5% over the five-year period. This confirms a **continued post-pandemic decrease in oven usage at home**, replaced by more convenient cooking solutions.

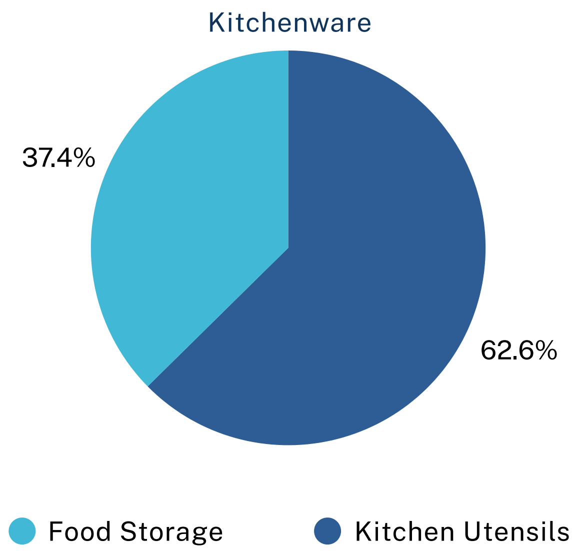
- **Kitchenware**, like *food storage solutions and utensils.*

It recorded **272.2 million* USD in 2024**, remaining stable with -0.1% year-on-year growth and a **CAGR of 1.3% from 2019 to 2024**. Despite a slowdown, it remains a core component of modern kitchen routines.

Kitchen utensils, which include items like spatulas, ladles, and graters, totalled **162.5 million USD*** in 2024. The subcategory posted a 1.2% annual growth and a robust **CAGR of 4.1%**, demonstrating **strong and consistent consumer interest in practical, high-quality cooking tools.**

Graph 50 - Sales of Cookware and Kitchenware by Category: Value in million $ (2021-2023) - Spain





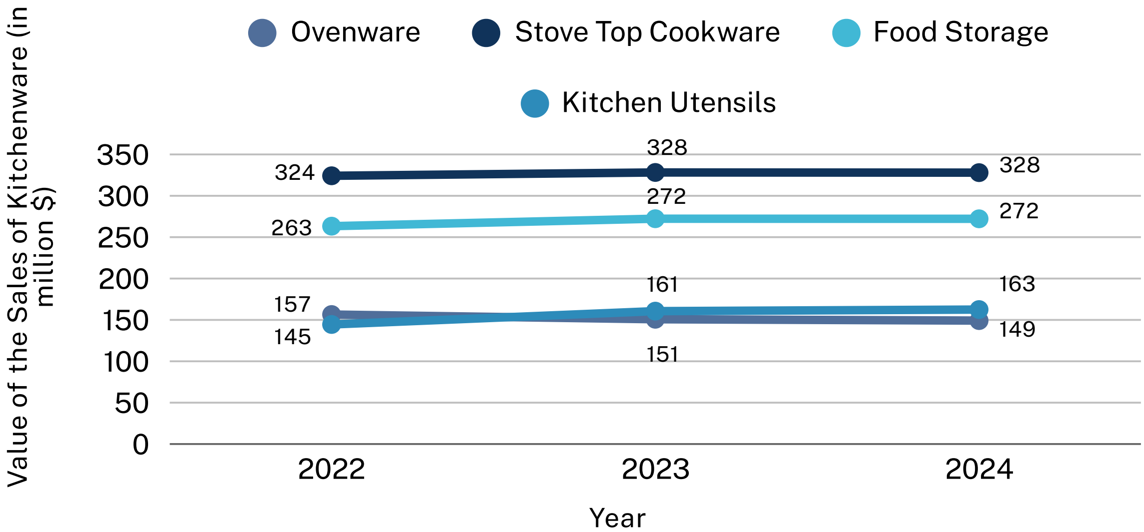
Source: Euromonitor - Complete Study

*Conversion carried out on May 23, 2025, at an exchange rate of 1 EUR = 1,134 USD (WISE)

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

Graph 51 - Sales of Kitchen by Category: Value in million $ (2021-2023) - Spain



Source: Euromonitor - Complete Study

2. Bathroom Accessories

- **Bathroom accessories,** including *shower baskets, soap dispensers, toilet roll holders, towel rails* and others.

As presented previously the **bathroom accessories** market in Spain is expected to register robust growth between 2024 and 2030, reflecting a strong compound annual growth rate **(CAGR) of 10%** during the forecast period.

The segment of towel racks and rings dominates the market, accounting for **41.71% of the total revenue in 2024**, indicating a strong consumer preference for **practical and decorative elements** in bathroom organization.

Meanwhile, grab bars are emerging as the fastest-growing segment, likely driven by **increasing awareness of safety and accessibility in home design**, especially among aging populations and inclusive households.

Source: Euromonitor - Complete Study | Statista - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

The market landscape is characterized by the presence of key international and local **players**, such as **LIXIL Corporation, TOTO Ltd., Kohler Co., Moen Incorporated, and Roca Corporación Empresarial**. These companies are investing in both **innovation and aesthetic appeal**, responding to a growing demand for bathroom accessories that are not only functional but also aligned with modern interior design trends. The popularity of **smart and sustainable solutions continues to rise**, reinforcing the importance of eco-conscious and technologically integrated offerings.

Overall, the Spanish bathroom accessories market is **well-positioned for sustained growth**, fueled by renovation activity, consumer demand for quality and design, and the strategic positioning of established brands.

3. Household appliances (ironing boards)

- **Ironing boards.**

The **ironing board** market in Spain represents a niche yet **growing segment** within the broader household appliances sector. Though typically categorized under housewares or small domestic equipment, ironing boards are increasingly aligned with the **functional and lifestyle-driven evolution** of the household appliances industry. This alignment is reinforced by consumer expectations for convenience, design integration, and utility.

Source: Statista | Statista | Horizon Grand View Research

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.2. Product Segmentation

According to Statista, the Spanish household appliances market is expected to generate over **USD 6.09 billion* in 2025**, with forecasts indicating stable growth – a **CAGR of 3.04% between 2025 and 2030** - driven by rising disposable incomes, urbanization, and a focus on home efficiency and aesthetics.

In this context, ironing boards are no longer seen merely as utilitarian tools, but rather as **integral components of modern home care ecosystems** — often bundled with **irons, steamers, or smart home laundry solutions**.

While specific figures for ironing boards are limited, the adjacent market for irons in Spain is expected to generate **USD 82.14 million* in 2025**, as mention previously. Given the complementary relationship between irons and ironing boards, it is reasonable to expect a mirrored or proportionally linked growth trajectory in ironing boards.

At the European level, the ironing board market accounts for a **significant global share**, indicating a strong cultural and functional demand in the region. Spain, as part of this trend, benefits from similar lifestyle patterns and household behaviours that support sustained interest in ironing products.

*Conversion carried out on May 23, 2025, at an exchange rate of 1 EUR = 1,134 USD (WISE)

Source: Euromonitor - Complete Study | Statista - 1 | 2

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

This section outlines the **main drivers currently shaping the homewares market in Spain**. These factors help explain the underlying forces behind consumer demand, product innovation, distribution shifts, and material choices. By identifying these key drivers, it becomes possible to **anticipate market movements** and understand how brands are adapting their strategies to respond to **structural, behavioural, and regulatory changes**.

Key Market Drivers - Homeware and Houseware Sector	
1. Post-pandemic consumer behaviour and replacement-driven demand	**2.** Sustainability concerns and regulatory pressure driving PFAS-free innovation
3. Digitalization and the growing relevance of e-commerce in homewares	**4.** Material innovation and cost pressures accelerating adoption of Tritan plastic in food storage
5. Shift toward budget-conscious consumption and simplified home cooking	**6.** Brand leadership and strategic positioning through affordability, design, and innovation
7. Increase in meal prepping and at-home dining experiences	**8.** Efficiency-driven consumer behaviour and regulatory pressure influencing cookware choices
9. Sustainability as a strategic imperative for competitiveness in homewares	**10.** Aesthetic value and social media influence sustaining demand for dinnerware
11. Urbanization and smaller living spaces shaping product design	**12.** Shift toward experiential retail and interactive shopping

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

1. Post-pandemic consumer behaviour and replacement-driven demand

Following the end of lockdown restrictions, Spanish consumers resumed pre-pandemic habits of dining out, which led to a **decline in demand for certain homewares**, particularly ovenware, associated with home cooking. Nevertheless, product categories such as **dinnerware and beverageware continued to perform well** due to their high replacement rates and fragility. Overall, market value growth in 2023 was marginal but sustained, primarily driven by **price increases** and the **ongoing need to replace frequently used items**.

2. Sustainability concerns and regulatory pressure driving PFAS-free innovation

Growing environmental and health concerns regarding **PFAS and PFOA***, commonly found in non-stick cookware, are prompting a wave of innovation in the Spanish homewares market. Although Spain has not yet implemented a full ban, the **European Commission's 2023** proposal to prohibit all PFAS and PFOA has generated **industry-wide uncertainty.** In response, leading brands such as **Tefal and Kyocera** are proactively transitioning to PFAS-free and **ceramic-coated alternatives.** This shift is expected to intensify as consumers and manufacturers alike prioritise safer, more sustainable materials in cookware production.

Source: Euromonitor - Complete Study

*PFAS = per- and polyfluoroalkyl substances; PFOA = perfluorinated carboxylic acid

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

3. Digitalization and the growing relevance of e-commerce in homewares

E-commerce has evolved from a pandemic-driven necessity to a **central distribution channel** in the Spanish homewares market. Consumers are **increasingly comfortable purchasing online**, particularly because homewares are typically low-cost items that require minimal physical inspection. The ability to compare prices and review product specifications digitally further enhances the appeal. In response, **brands have accelerated their online strategies**, such as **Bergner's** launch of its e-commerce platform and the **Ekilu** app in 2023, howcasing a clear shift toward digital engagement and omnichannel presence.

4. Material innovation and cost pressures accelerating adoption of Tritan plastic in food storage

Innovation in materials is emerging as a key market driver in the Spanish homewares sector, particularly in **food storage**. **Tritan plastic**, a BPA-free, highly durable, and visually clear alternative to glass, is gaining traction due to its **superior resistance to staining** and safety advantages. Its adoption is being driven by the need for **longer-lasting, premium-quality products**, with brands aiming to stay competitive through material differentiation. As a result, plastic food storage using Tritan is expected to experience strong growth over the forecast period.

In parallel, rising global energy costs have disrupted the production of energy-intensive materials like glass. Key players such as **Duralex** and **Pyrex** halted glass production in Spain, further shifting demand toward alternative materials. This structural shift is likely to impact categories such as **ovenware and beverageware**, traditionally dominated by glass, reinforcing the strategic value of alternative materials like Tritan.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

5. Shift toward budget-conscious consumption and simplified home cooking

Retail value stagnation in the Spanish homewares market in 2024 was primarily driven by **increasing price sensitivity** and **changing consumer behaviours**. A notable shift was observed toward **budget-friendly purchases, ready-to-eat meals, and meal-kit subscriptions**, which reduce the need to invest in cookware and premium items. This behaviour reflects a **structural adjustment in consumer priorities**, especially in the context of economic caution and evolving lifestyle patterns.

6. Brand leadership and strategic positioning through affordability, design, and innovation

Ikea continues to lead the Spanish homewares market by offering an **extensive, well-designed, and affordable product portfolio** across key categories such as **beverageware, kitchen utensils, and food storage.** Its focus on **combining practicality with aesthetics** has reinforced its dominant market position. Likewise, **Bergner Europe**, through innovation in stove top cookware and commitment to **functionality and quality**, recorded the highest growth in 2024. These companies' strategic investments in **design, modularity, and safety features** are driving consumer choice and reshaping the competitive landscape.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

7. Increase in meal prepping and at-home dining experiences

The growing number of working professionals engaging in **meal prepping** and the overall shift toward home entertaining are structural behavioural drivers **boosting demand for dining-related products**. This trend supports increased sales of categories like **kitchen utensils, food storage, and dinnerware**, as consumers invest in practical and presentable home dining solutions. Retailers such as **Ikea** and **El Corte Inglés** are already responding by offering convenient glass meal-prep sets and reusable products.

8. Efficiency-driven consumer behaviour and regulatory pressure influencing cookware choices

The growing preference for **simple, quick, and energy-efficient cooking methods** is reshaping demand in the cookware segment, particularly **ovenware**. Consumers increasingly favour **multipurpose cookware** (e.g., induction-compatible one-pot pans) and appliances like **air fryers, pressure cookers, and microwave steamers** that reduce cooking time and cleanup effort. This behavioural shift is reinforced by rising energy costs and **stricter EU Ecodesign regulations**, pushing the market toward sustainable, easy-to-use solutions that align with efficiency and convenience.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

9. Sustainability as a strategic imperative for competitiveness in homewares

Sustainability is no longer a differentiating factor but a **core requirement for competitiveness** in the Spanish homewares industry. Manufacturers like **Lladró** are adopting comprehensive sustainability frameworks, such as aligning with the **UN Sustainable Development Goals** and circular economy principles, to **reduce emissions, support local sourcing, and minimise waste** through durable design and biodegradable packaging. Over the forecast period, sustainability practices are expected to become a **major driver of demand**, as both consumers and regulators increasingly prioritise environmental responsibility. Companies that integrate these principles are likely to strengthen resilience and improve market access within environmentally conscious segments.

10. Aesthetic value and social media influence sustaining demand for dinnerware

A behavioural market driver shaping the Spanish homewares sector is the **growing consumer perception of dinnerware** as a form of **home décor**. While inflation and reduced home cooking led to declining sales in other categories, **dinnerware remained resilient in 2023**. This is due to its dual role: **functional tableware** and a **low-cost decorative solution**, especially relevant at a time when larger home refurbishments are being postponed due to income pressures.

This driver is reinforced by a strong consumer trend: the **increasing influence of social media on purchasing decisions**. Platforms such as **Instagram** and **TikTok**, where food influencers frequently showcase **aesthetically plated meals**, are fuelling consumer interest in stylish and photogenic dinnerware. As a response, brands like **Villeroy & Boch** have launched visually appealing and gift-oriented collections.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

11. Urbanization and smaller living spaces shaping product design

As urbanization accelerates across Spain, particularly in major cities like **Madrid, Barcelona, and Valencia**, living spaces are becoming increasingly compact. This demographic and spatial shift is having a direct impact on houseware design and purchasing behaviour. Consumers living in smaller homes or apartments are prioritizing products that offer **space efficiency, modularity, and multi-functionality**.

12. Shift toward experiential retail and interactive shopping

While e-commerce has become a staple in the kitchenware market, **traditional retail is evolvin**g, not disappearing. To remain competitive and re-engage post-pandemic consumers, retailers in Spain are investing in **experiential retail strategies** that emphasize interactivity, learning, and inspiration. Flagship stores and larger retail formats are now offering **cooking demonstrations, product testing zones, lifestyle-themed displays, and hands-on workshops** that transform shopping into an engaging activity rather than a transactional process.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.3. Key Market Drivers

The **key market drivers** shaping the kitchenware and houseware industry in Spain reflect a **landscape in transformation,** defined by **structural, technological, and behavioural shifts**. From urbanization and digitalization to evolving sustainability regulations and lifestyle changes, these drivers highlight the complex forces **influencing both supply and demand**.

Economic pressures and post-pandemic habits are reinforcing **budget-conscious** and **replacement-driven consumption**, while innovations in materials and design are enabling brands to respond with **affordable, practical, and sustainable solutions**. At the same time, a growing emphasis on health, home organization, and energy efficiency is pushing consumers toward safer and smarter functional products.

On the other hand, **digital commerce continues to expand**, yet it coexists with a resurgence in experiential, in-person retail, demonstrating that **convenience** and **emotional engagement** are both critical to market success. Furthermore, shifts in consumer behaviour, such as increased **meal prepping**, simplified cooking, and space optimization in smaller homes, are reshaping what consumers value in homeware.

In conclusion, the Spanish market is driven by a combination of regulatory influence, technological progress, lifestyle adaptation, and consumer expectations. Businesses that respond strategically to these evolving drivers, by **offering relevant, design-forward, and responsibly made products**, will be best positioned to lead in a highly competitive and fast-changing sector.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

This section outlines the **main trends** currently emerging in the homewares market in Spain. These trends reflect **evolving consumer lifestyles, design preferences, and attitudes towards sustainability, convenience, and health.** By understanding these key trends, it becomes possible to track shifting consumer expectations and how brands are responding with **innovation, product design and lifestyle alignment**. These trends highlight important movements in aesthetic values, environmental consciousness, and simplified living, **helping businesses stay ahead** in a competitive and fast-evolving sector.

Key Trends on the Market - Homeware and Houseware Sector	
1. Preference for compact, energy-efficient and versatile kitchen appliances	**2.** Growing preference for premium, health-conscious cookware
3. Preference for reusable and sustainable dining items	**4.** Adoption of one-pot cooking and compact appliances
5. Digital-first discovery and influencer-led curation	**6.** Minimalist aesthetics aligned with Scandinavian and Japandi styles
7. Customization and modular design in kitchen tools	**8.** Increased demand for child-and senior-friendly products
9. Eco-certifications and transparency as purchase motivators	**10.** Seasonal and festive product lines boosting repeat purchases
11. Hybrid living driving multifunctional kitchen solutions	**12.** Rise of the conscious consumer and second-hand economy

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

1. Preference for compact, energy-efficient and versatile kitchen appliances

The growing popularity of appliances like **air fryers**, requiring minimal equipment and energy, signals a clear trend toward **convenience-focused cooking**. This has led to a decline in demand for traditional ovenware, indicating a broader move towards **simpler and more flexible home cooking habits**, with minimal use of traditional homewares.

2. Growing preference for premium, health-conscious cookware

Some consumers are increasingly turning to **higher-end brands** offering cookware that delivers better results and health-related benefits. The success of brands like **Tefal** and **Lagostina** reflects a shift in preferences towards materials perceived as healthier alternatives, particularly in the **non-stick segment**.

3. Preference for reusable and sustainable dining items

Environmental awareness, reinforced by campaigns such as "El Futuro lo Hacemos Hoy" and municipal refill initiatives, is encouraging consumers to adopt **reusable glass options** (e.g., borosilicate bottles, recycled glass tumblers). This shift is particularly evident in **beverageware**, which is seeing growth from demand for both sustainability and aesthetics in **table presentation**, with brands offering high-design glass and ceramic collections.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

4. Adoption of one-pot cooking and compact appliances

Consumers, especially those with time constraints, are gravitating towards **one-pot recipes and appliances requiring less effort and space**. These lifestyle-driven preferences reflect broader trends in urban living and modern meal preparation habits.

5. Digital-first discovery and influencer-led curation

The **influence of social media** on consumer behaviour continues to grow, especially in the homewares segment, where **aesthetics and lifestyle alignment play a critical role**. Platforms such as **Instagram, Pinterest, and TikTok** have become primary discovery tools for new kitchenware products. **Influencers, food bloggers, and home organization creators** regularly showcase product recommendations, "kitchen hacks," and aesthetically styled content that inspire direct purchasing.

6. Minimalist aesthetics aligned with Scandinavian and Japandi styles

Interior design trends have a direct influence on the visual appeal and desirability of kitchenware. A growing number of Spanish consumers are embracing minimalist aesthetics, particularly those inspired by **Scandinavian simplicity and Japandi fusion** (a blend of Japanese minimalism and Scandinavian functionality). This style emphasizes **neutral tones, matte textures, clean lines, and the removal of clutte,** creating calming and organized kitchen environments. As a result, brands are adapting their product lines to reflect this trend, offering visually cohesive collections of kitchen tools, storage containers, and dinnerware in muted, natural palettes.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

7. Customization and modular design in kitchen tools

As consumers seek more control and personalization in their household purchases, **modularity** and **adaptability** have emerged as key product features. Kitchenware that can be tailored to individual preferences, such as **stackable pantry containers, adjustable cutlery trays, or interchangeable mixer attachments**, enhances both usability and consumer satisfaction. These modular products appeal to urban residents with limited space, families with diverse needs, and individuals who enjoy organizing their kitchens according to their own routines.

8. Increased demand for child- and senior-friendly products

Demographic changes are driving **innovation toward inclusivity in kitchenware design**. With more multi-generational households and an aging population in Spain, there is rising demand for **ergonomic, lightweight, and safety-enhanced products**. For families with children, non-slip silicone utensils, spill-proof cups, and durable melamine plates are popular. For seniors, kitchen tools with easy-grip handles, large labels, and simple operation reduce strain and increase independence.

9. Eco-certifications and transparency as purchase motivators

Sustainability claims are no longer enough: consumers now expect **credible, transparent proof**. Certifications such as **FSC** (for responsibly sourced wood), **GOTS** (for textiles), and **BPA-free labels** have become critical decision factors, especially among environmentally conscious buyers. Consumers are increasingly skeptical of generic green marketing and are **actively looking for third-party assurances that validate sustainability claims**.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

10. Seasonal and festive product lines boosting repeat purchases

Kitchenware brands are capitalizing on **seasonal moments and festive periods** to drive recurring sales and consumer engagement. Limited-edition product collections, such as **Christmas-themed baking molds, pastel-colored spring dinnerware, or picnic-friendly summer sets**, encourage consumers to refresh their kitchens throughout the year. These lines create urgency and emotional appeal, often positioned as giftable items or celebratory tools for home entertaining.

11. Hybrid living driving multifunctional kitchen solutions

As hybrid work models become a permanent feature in many Spanish households, kitchens are transforming into **multipurpose environments** used not only for cooking, but also for working, homeschooling, and socializing. This evolution has increased the demand for **multifunctional kitchenware and adaptable layouts**. Products that serve dual purposes, like cutting boards that double as serving trays or storage containers that act as lunchboxes, are gaining popularity.

12. Rise of the conscious consumer and second-hand economy

A growing number of Spanish consumers, particularly younger demographics, are embracing **mindful consumption habits** that emphasize **reuse, longevity, and waste reduction**. Alongside interest in sustainable new products, there is increasing openness to **second-hand and refurbished homeware purchases** through platforms like Wallapop or specialized vintage stores. Consumers are reevaluating their relationship with ownership, valuing durability and story-rich items over fast, disposable options.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.4. Identification of the Key Trends on the Market

In conclusion, the Spanish kitchenware and houseware sector is undergoing a **dynamic transformation** shaped by **shifting consumer lifestyles, values, and purchasing behaviours**. Key trends reveal a clear move toward **functionality, sustainability, and aesthetic alignment**, as consumers demand products that not only meet their practical needs but also support their emotional well-being and personal identity within the home.

The rise of digital discovery and influencer culture has reshaped how products are found and evaluated, making visual appeal and online presence crucial to brand success. Simultaneously, design trends rooted in **minimalism, modularity, and seasonal expression** reflect broader societal preferences for calm, organization, and lifestyle curation.
Demographics also play a pivotal role: from aging populations and young families needing ergonomic, inclusive tools, to urban consumers looking for space-saving and multifunctional solutions. Meanwhile, an increasingly eco-conscious public is driving demand for certified sustainable products and showing growing interest in reusability, second-hand goods, and circular design.

The Spanish market is, therefore, evolving toward a more **holistic, value-driven, and emotionally resonant space**, where innovation, design, and ethics must align seamlessly. Brands that anticipate these layered needs and communicate clearly will be best positioned to thrive in Spain's competitive and increasingly discerning homeware landscape.

Source: Euromonitor - Complete Study

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

Understanding consumer behavior is essential for anticipating trends and making informed decisions in the kitchenware and houseware sector. In recent years, consumers have developed **new expectations** that go beyond functionality, placing greater importance on **emotional well-being, simplicity, sustainability, and aesthetic harmony within the home**. Purchasing decisions are now shaped by the desire for practical, durable, and user-friendly products that also contribute to comfort, organization, and self-expression. The following insights provide a clear overview of the key factors currently driving **consumer preferences** in this market.

Consumer Insights - Homeware and Houseware Sector	
1. The home as a center of comfort and investment	**2.** Innovation must be practical and user-centered
3. Increased spending in Spain, but with heightened caution	**4.** Durability and value are more important than ever
5. Design matters: combining functionality with emotional appeal	**6.** Trust in local and european brands is growing in Spain
7. Sustainability: important, but conditional	**8.** Private labels are growing, but brand value still wins
9. The emotional role of the home is growing	**10.** Consumers want organized and stress-free homes
11. Simple, clear products win consumer trust	**12.** Consumers are seeking lifestyle alignment and personal identity
13. Multi-generational households drive diverse product needs	**14.** Consumers expect post-purchase support and warranty clarity

Source: GFK | NielsenIQ | GFK YouGov

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

1. The home as a center of comfort and investment

As a result of the pandemic, homes became multi-functional spaces, offices, schools, and wellness centers. This shift changed consumer priorities, leading to a consistent investment in enhancing household environments. Even in 2022, consumers continued purchasing durable household items to optimize space, efficiency, and comfort. This behavior expands demand for **kitchenware that improves everyday living**. Consumers are looking for well-designed, space-efficient tools like stackable food containers, foldable ironing boards, and compact multifunctional gadgets. A focus on home comfort and control means more value is placed on tools that support meal prep, storage, and organization, especially in smaller urban kitchens.

2. Innovation must be practical and user-centered

Consumers are increasingly selective when it comes to innovation. They are not impressed by features that feel gimmicky or overly technical. Instead, there is growing appreciation for **functional innovations** that simplify everyday tasks, such as easy-to-clean surfaces, integrated measuring systems, or stackable designs. Producers must prioritize **human-centered design**.

Source: GFK | NielsenIQ

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

3. Increased spending in Spain, but with heightened caution

Spanish households spent 9.2% more on consumer goods in 2023 compared to the previous year, but this growth was driven mainly by inflation, not volume. Consumers are not buying more, they are paying more for the same or slightly fewer items, which reflects cautious consumption and budget awareness. Spanish consumers expect more value from their purchases. Kitchenware products must **justify their price** through superior quality, durability, and multifunctionality.

4. Durability and value are more important than ever

Consumers are adopting a more conservative approach to shopping, prioritizing **long-term** value and resisting impulse purchases. A key expectation in 2024 is that products will be **built to last**, resisting daily wear and remaining reliable over time. Brands that highlight high-quality materials, technical resilience, and long warranties are more likely to win trust.

5. Design matters: combining functionality with emotional appeal

Today's consumer is not just buying products, they are curating a lifestyle. Kitchenware that blends form and function, beautifully designed items that also perform well, has a distinct advantage. Design language that aligns with **home décor trends** enhances product desirability. Manufacturers should invest in **visual branding and product design**, especially when selling online. Color palettes, shapes, and textures that reflect lifestyle aesthetics boost engagement and conversion rates. Digital presence matters too: consumers judge products by what they see on screens before shelves.

Source: GFK | NielsenIQ

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

6. Trust in local and european brands is growing in Spain

Spanish consumers are gravitating towards brands that feel **familiar, transparent, and local**. The post-pandemic focus on supply chain resilience and economic recovery has led to a preference for products “made in Europe” or “made in Spain.” These carry connotations of higher quality, safety, and ethical standards. Terms like "fabricado en España" and European certification logos can foster **consumer trust and perceived value**.

7. Sustainability: important, but conditional

Sustainability remains a key issue, especially among more affluent or values-driven consumers. However, it is often a **secondary** decision factor: it enhances appeal when paired with performance. Consumers are wary of greenwashing and seek **credible and clear sustainability claims**. Products using recycled metals, biodegradable plastics, or bamboo can attract attention, **if accompanied by functional benefits**.

8. Private labels are growing, but brand value still wins

Private label (store-brand) products have gained market share, especially as inflation impacts budgets. However, consumers are willing to spend more on branded products when they offer **a clear value proposition**, such as enhanced quality, better durability, or exclusive features. To remain competitive, brands must differentiate through innovation, design, sustainability, and **strong brand narratives**. Highlighting unique selling points (USPs), offering warranties, and running educational campaigns can elevate branded offerings above private labels.

Source: GFK | NielsenIQ

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

9. The emotional role of the home is growing

Homes are no longer just practical spaces, they have become **emotional sanctuaries**. Consumers increasingly associate their home environment with emotional well-being, self-expression, and personal control. This shift is particularly strong in Europe, where over 65% of consumers say their home now plays a larger role in their happiness and mental health compared to pre-pandemic years. Kitchenware and houseware products that **enhance the emotional experience of being at home** are gaining relevance. This includes aesthetically pleasing tools, tactile materials, and products that promote rituals such as cooking, baking, or home organization. Marketing should highlight how products contribute to comfort, calm, or creativity, not just utility.

10. Consumers want organized and stress-free homes

Clutter and disorganization are perceived as stressors. Consumers increasingly invest in **storage, cleaning, and organizing tools** that help maintain peace of mind. In particular, younger consumers see “functional aesthetics” as a source of emotional relief. There’s high demand for **modular storage, minimalist organizers, and stackable kitchen solutions**. These products are viewed not just as tools, but as enablers of mental clarity.

Source: GFK | NielsenIQ | GFK YouGov

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

11. Simple, clear products win consumer trust

Consumers today crave **simplicity**, in product features, branding, and purchasing experiences. The study notes a strong rejection of overly complex features or mixed messaging. Price is still important, but **value clarity** is what drives purchases: consumers want to understand *why* a product is worth it. Brands must **streamline packaging and communication** to focus on 1–2 key benefits. Kitchenware that's easy to use, clean, and store, while being affordable, is winning attention. Brands should be marketed using simple, honest language that connects both practically and emotionally.

12. Consumers are seeking lifestyle alignment and personal identity

Kitchenware purchases are becoming a **form of self-expression**, with consumers increasingly selecting products that align with their personal values, lifestyle goals, and aesthetic preferences. Whether embracing a **zero-waste lifestyle, a minimalist home, or a passion for culinary experimentation**, individuals now expect their kitchen tools to reflect who they are and how they live.

13. Multi-generational households drive diverse product needs

The rise in **multi-generational living**, accelerated by economic factors and evolving family dynamics, is reshaping expectations in the kitchenware sector. Households now often include **grandparents, parents, and children under one roof**, each with different cooking habits, preferences, and physical needs. This shift increases **demand for inclusive, adaptable, and easy-to-use products** that cater to all ages and abilities.

Source: GFK | NielsenIQ | GFK YouGov

02. MARKET OVERVIEW - KITCHENWARE AND HOUSEWARE SECTOR

2.5. Consumer Insights

14. Consumers expect post-purchase support and warranty clarity

In today's value-conscious and digitally connected market, the consumer experience does not end at the point of sale. Buyers now place high importance on **transparent and reliable post-purchase support**, including **clear warranty terms, easy returns, and responsive customer service**. This expectation is especially strong for higher-priced or multifunctional kitchenware items, where consumers seek reassurance that their investment is protected.

Consumer behavior in Spain's kitchenware and houseware sector is becoming increasingly **multidimensional**, shaped by a combination of emotional, practical, and lifestyle-driven factors.

The 14 insights collectively reflect a market where consumers are no longer guided solely by price or necessity, but by a **broader desire for products that enhance their daily lives**, **reflect their personal values**, and **contribute to a sense of comfort and identity at home**.

Design, durability, simplicity, and functionality remain foundational, but are now complemented by growing interest in **sustainability**, **local sourcing**, and **inclusive usability**. Consumers seek products that are intuitive, long-lasting, and aligned with evolving household structures, such as multi-generational living. Moreover, expectations around trust, clarity, and **post-purchase support** are rising, with brands being evaluated not just for what they sell, but how they communicate and support consumers throughout the entire experience.

Overall, the modern Spanish consumer is more informed, selective, and emotionally engaged. Understanding these layered expectations, and responding with authenticity, will be **essential for success** in this evolving and increasingly sophisticated market.

Source: GFK | NielsenIQ | GFK YouGov

03.
IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

The present chapter provides a **detailed analysis** of the main **retail stores** for **kitchenware, ironing boards, and bathroom accessories** in **Spain**, focusing on key retailers such as **Carrefour, El Corte Inglés, Alcampo, Lidl, and DIA**.

These stores cover a **wide range of retail formats**, from premium department stores to large supermarkets and discount chains, offering a comprehensive overview of how these product categories are marketed and presented.

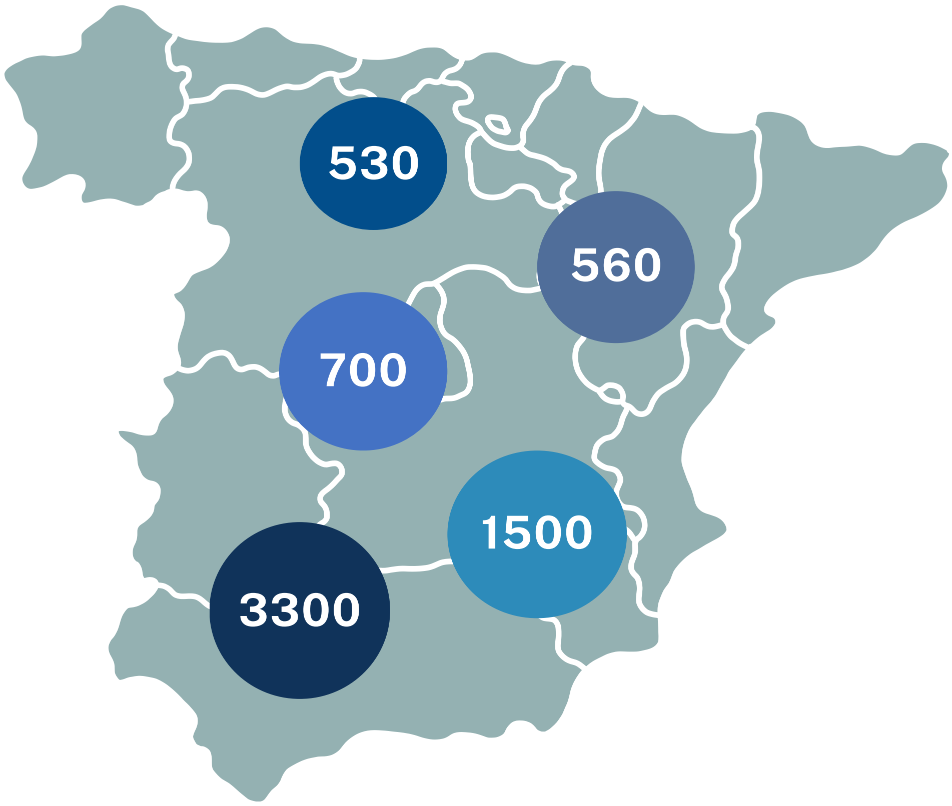
Through thorough store checks at each retailer, the chapter examines the **availability, brand assortment, pricing, and merchandising strategies** for kitchenware, ironing boards, and bathroom accessories. It highlights how each store organizes these categories, considering **product variety and quality levels**, and how this organization meets diverse consumer needs.

The analysis also explores presentation styles, including **product display, shelving, and packaging**, showing how these factors influence shopper experience and buying decisions. Particular attention is given to brand segmentation and product positioning, demonstrating how retailers differentiate their offerings in these categories according to their target markets.

By comparing these major retailers, the chapter offers valuable insights into **Spain's retail landscape** for kitchenware, ironing boards, and bathroom accessories, revealing how stores balance quality, price, and brand reputation to **attract and satisfy customers**. This evaluation provides a **solid foundation for understanding market trends** and guiding strategic decisions within these home and lifestyle segments.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Image 1 - Total number of stores of the main retail chains in the home and kitchen segment in Spain



Carrefour
Around 1500 stores in Spain, 204 of which are hypermarkets.

El Corte Inglés
Around 74 department stores in Spain.

Alcampo (Auchan)
About 530 stores - 80 hypermarkets and 446 supermarkets.

Lidl
Total of 700 stores, with plans for 50 additional openings in 2025.

Grupo Dia
Around 3300 stores in Spain, of which around 1500 are franchises.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefour ES

Website: https://www.carrefour.es/

Carrefour España runs hypermarkets, supermarkets, and convenience stores across Spain, offering groceries, electronics, clothing, and more.

The store check conducted at Carrefour evaluated the presence and organization of key categories within the **Kitchen and Houseware segment**.

Carrefour, one of Spain's leading retailers, is known for its **large-format stores** that offer a broad assortment of products across multiple categories.

The store visited in Madrid was **notably spacious**, allowing for a clear and well-structured layout of different sections. All main targeted categories within Kitchen and Houseware were present, reflecting Carrefour's commitment to offering a **comprehensive product range** in these areas.

A distinctive feature of this location was that the houseware items were displayed on a separate floor, providing **more space for category segmentation** and enhancing the overall customer experience.
This store check, therefore, aimed to characterize the in-store execution of relevant categories, and to evaluate how Carrefour structures its offering to **meet consumer needs** within the home and kitchen product space.

Target categories available during the Store Check:

- Bathroom Accessories
- Ironing Boards
- Kitchen Accessories

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Bathroom Accessories

Types of products available in the store:

Accessories for solid and liquid soaps | Toothbrush cups | Toilet brushes | Laundry baskets.

Types of materials available in the store: Plastic | Stainless steel | Ceramic (stone effect) | Glass.

Highlighted products: Boxes of toiletry sets (liquid soap; solid; toothbrush cup).

Main Brands:

MSV — European Bathroom Accessories Manufacturer

Berilo

TATAY

Price range:

€2.49-€8.99
Individual products

€9.99-€19.99
Complete packs

Premium products/brands:
MSV brand with sets from **€9.99** to **€19.99**. These sets are for mirrors or for toilet sets in polypropylene (the cheapest), ceramic and glass (the most expensive). Presented in boxes, this type of pack contains a **toothbrush cup, solid soap dispenser, liquid soap holder** and, in some cases, a **holder for all the accessories** inside the pack.

Medium/low products/brands:
Tatay with stainless steel acessories at **€6.99** and metal at **€8.99**. This brand also has plastic products at **€2.99** (toilet brush) and accessories made from **recycled material** at **€9.99** - set of 4 accessories - **liquid soap, solid soap, accessory hanging basket + toothbrush cup.**
100% recyclable hanging basket for **€2.99** and aluminum holder from **€19.99** to **€29.99**. This brand is discounted until July 10, 2025.

Low products/brands:
The Bergner brand has lower quality products, focusing exclusively on **plastic accessories** at **€2.49**.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Packaging/product presentation: Most sets presented in boxes with languages in **English, Spanish, Portuguese, German, Italian, Czech** and with sustainability symbols and other certifications. Individual accessories are not boxed.

Arrangement of products in the store: Individual products next to each other. The **brands are mixed up**, organized according to the offer (boxes next to other boxes and loose products next to each other).




In terms of bathroom accessories, the store offers a complete assortment, though with **limited brand variety** and **minimal differentiation in color or design**. The main distinctions lie in the materials used and whether products are sold individually or in multi-pack formats.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Ironing Boards

Types of products available in the store:

Ironing boards (different sizes) - in the same space as clothes hangers and other clothing house accessories.

Types of materials available in the store: Cotton | Stainless steel.

Highlighted products: All products and brands are given equal prominence, given their specificity.

Main Brands:

vileda

home

Rayen

LEIFHEIT

Premium products/brands: Models from Leifheit, a recognized brand in this category. One standard Leifheit board is priced at **€68** with dimensions of 120x38 cm, offering a **functional and compact design**. A more advanced version is available for **€99**, featuring a **steam/iron rest blocker**, which adds safety and convenience, especially for frequent use.

Medium/low products/brands: Vileda also offers a selection of ironing boards positioned in the **more affordable segment**. One entry-level Vileda model, measuring 114x36 cm, was available on promotion for **€34**, making it an attractive option for budget-conscious shoppers. Another Vileda board, slightly larger at approximately 111x36 cm, was priced at **€51.99**, offering a **sturdier build and more stable frame**.

Price range:

€30.99-€99
Ironing boards

Low products/brands: Home also offers a **budget-friendly ironing board** option. Priced at **€30.99**, this model measures 114x36 cm. While it shares similar dimensions with the entry-level Vileda board, it **lacks some of the enhanced stability** or branded features found in higher-priced models.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Packaging/product presentation: All products are packaged in **plastic**, with product descriptions available in at least **six languages** (English, Spanish, Italian, Portuguese, German, Czech) with relevant certification symbols clearly displayed on the packaging.

Arrangement of products in the store: The product’s specificity makes it stand out little in the store. The ironing boards are placed upright on display racks, with all **brands mixed together**, making it difficult for any one brand or model to stand out.

- **Very similar products** are available across different brands, with their positioning on shelves varying primarily based on brand identity. While the core materials used in these items are largely the same, the more expensive options, typically from **better-known or premium brands**, tend to appear **more robust and well-finished**. These higher-priced items often benefit from packaging, branding, or minor design enhancements that differentiate them from lower-cost alternatives.
  In the same section of the store, adjacent to the ironing boards, there is a variety of **other household items** that complement the laundry and garment care category. These include **clothing hangers, laundry baskets, and drying racks**. The layout groups together practical, everyday-use products that support home organization and textile care, creating a **coherent and accessible shopping experience** for customers looking to equip or upgrade their household essentials.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Kitchen Accessories

Types of products available in the store:

Cookware | Utensils (from forlks, spoons, kives, ladles, etc) | Plates and Glasses | Cutting boards.

Types of materials available in the store:
Cookware: stainless steel; glass (lid)
Utensils: steel; plastic; wood
Cutting boards: wood; plastic
Plates: porcelain.

Highlighted products: Plates and glasses from Home; Accessories from Tescoma; Frying pans and woks in discount.

Cookware

Main Brands:

Price range:

€12.99-€85
Individual pans

€20-85€
4 to 6 pieces (packs)

Premium products/brands: Tefal's 3-piece frying pan pack (20/24/26 cm) is priced at **€39.90**, while Magefesa offers **stainless steel** packs with glass lids from **€49.99 to €69**. Home offers a complete stainless steel cookware set for **€85**, with features and design comparable to leading brands. Sanpietro pressure cookers, depending on size and specifications, also reach up to **€85**. Individual pieces of pressure cookers from both brands are positioned at the higher end of the price range due to their **quality and finish**.

Medium/low products/brands: The medium range includes value packs like the Home 3-piece frying pan set (20/24/28 cm) with a €20 discount, and smaller Magefesa sets. Individual pots around **€26**, especially from Home or Magefesa, offer good balance between **price and quality**.

Low products/brands: In the low range, individual items dominate. **Vitrinor** frying pans and woks are offered at very accessible prices between **€12.99 and €16.99** for the 26 cm size. Entry-level stainless steel pots begin at **€26**, often without accessories like lids. Sanpietro also offers a **basic pressure cooker** with a glass lid at only **€19.99.**

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Packaging/product presentation: The cookware sets are **packaged in boxes** without product demonstration. Individual items are not boxed; instead, they are either **wrapped in plastic** (for packs of cheaper pans or frying pans) or have a **paper label attached to the handle** (for individual frying pans and woks). These labels provide product **descriptions in at least six languages**, along with information on **materials** and **certifications.**

Arrangement of products in the store: Sets displayed in boxes on the **lower shelves**. Individual products **displayed hanging** (in the case of frying pans and woks). In the case of discounted brands, these are placed in a specific aisle, with discount signs. **Brands all mixed together**.

Utensils

Main Brands:

home, tescoma, san ignacio

Price range:

€0.50-€9.99
Individual utensil

€24.99-€39.99
Packs of 24 pieces

Premium products/brands: In the premium segment, **complete high-quality** sets stand out. **San Ignacio** offers a 24-piece stainless steel cutlery set (spoons, knives, and forks) for **€24.99**, combining **durability with classic design**. **Bergner** presents the 24-piece Eiffel collection at **€39.99**, featuring a modern and elegant finish.

Tescoma is also a recognized premium brand known for **durable and well-designed utensils**, often found in similar quality and price ranges. This brand was highlighted in the store, with several high quality products as ladles, cooking hammers, peelers, whisks, and so on. Their prices range from as low as **€0.50** for wooden skewers to **€9.99** for a plastic cooking hammer. Additionally, they offer a variety of utensils made from **stainless steel, wood, plastic, and rubber** to suit different cooking needs.

Medium products/brands: In the medium and low range, **Home** is the most accessible brand, offering **individual utensils** priced between **€1.19 and €3.99**, perfect for everyday use or replacement. They also provide a **24-piece stainless steel set** for **€29.99**, as well as a more economical version with **plastic handles for €10.99**, offering practical and affordable options.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Packaging/product presentation: Individual products such as **ladles, spatulas, and whisks** have **hang tags** attached to their handles. Loose knives, spoons, and forks are displayed lying flat in **compartments designed to allow customers to select the desired quantity**, similar to a shelf with designated slots for each type of cutlery. These loose utensils do not have tags or additional packaging. Meanwhile, cutlery sets are neatly **packaged inside boxes**, that include descriptions in at least six languages, along with certification logos.

Arrangement of products in the store: Individual utensils are either **hung with a tag attached** to the handle or sold in packs placed inside boxes, which are stored on **lower shelves**.

Plates

Main Brands:

IDEALCASA

Price range:

€1.49-€3.79
Individual plate

€41.99-€49.99
18 and 12 pieces

Premium products/brands: For plates, **Idealcasa** presents an elegant **18-piece porcelain dinnerware set** priced at **€41.99**, combining timeless design with durability, ideal for formal dining occasions or special gatherings. In addition to the full set, they also offer **individual stoneware plates** at **€2.99** each, allowing customers to customize or expand their collections with versatile, everyday pieces. Meanwhile, **Santa Clara** features a sturdy 1**2-piece stoneware set** priced at **€49.99**, celebrated for its **high-quality craftsmanship and rustic aesthetic** that adds warmth and character to any table setting. Both brands emphasize quality materials and thoughtful design, appealing to customers seeking both style and long-lasting use.

Medium products/brands: Plates in this category are available individually from **€1.49 to €3.79**, primarily through the **Home** brand, which offers accessible and functional designs. The selection includes a variety of **styles and sizes**, making it easy for customers to mix and match according to their needs, without compromising on durability or functionality.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Packaging/product presentation: Loose items **do not have tags, boxes, or plastic wrapping**. Sets are presented in **boxes** that, in some cases, feature a transparent side allowing the plate design to be seen. When the boxes are not transparent, they display an **image of the plate**, descriptions in six languages, packaging certification logos, and other relevant information.

Arrangement of products in the store: Individual items are typically displayed on **higher shelves** for easy visibility and access, allowing customers to browse and select single pieces with convenience. In contrast, **boxed sets are arranged on lower shelves**, providing a clear and organized presentation while optimizing space and making it easier to handle larger, packaged items. This layout enhances the shopping experience by clearly **distinguishing between single products and complete sets**.

Cutting boards

Main Brands:

home san ignacio

Price range:

€1.99-€14.99
Cutting boards

Premium products/brands: In the premium category, **San Ignacio** offers a large wooden cutting board measuring **48x38x4 cm** priced at **€14.99**. This board is durable with a refined finish, ideal for those seeking quality and longevity.

Medium products/brands: In the medium to low price range, a smaller wooden cutting board from **Home** measuring **45x30 cm** is available for **€14.99.** Besides, some lower prices from this brand are also available, being characterized by its smaller size, as well as composition.
In the store there are several wooden cutting boards, as well plastic ones, that often present a lower price, like **€1.99**.

Packaging/product presentation: Wrapped in **plastic** with a **simple label** displaying the product description, brand logo, and certification marks when applicable.

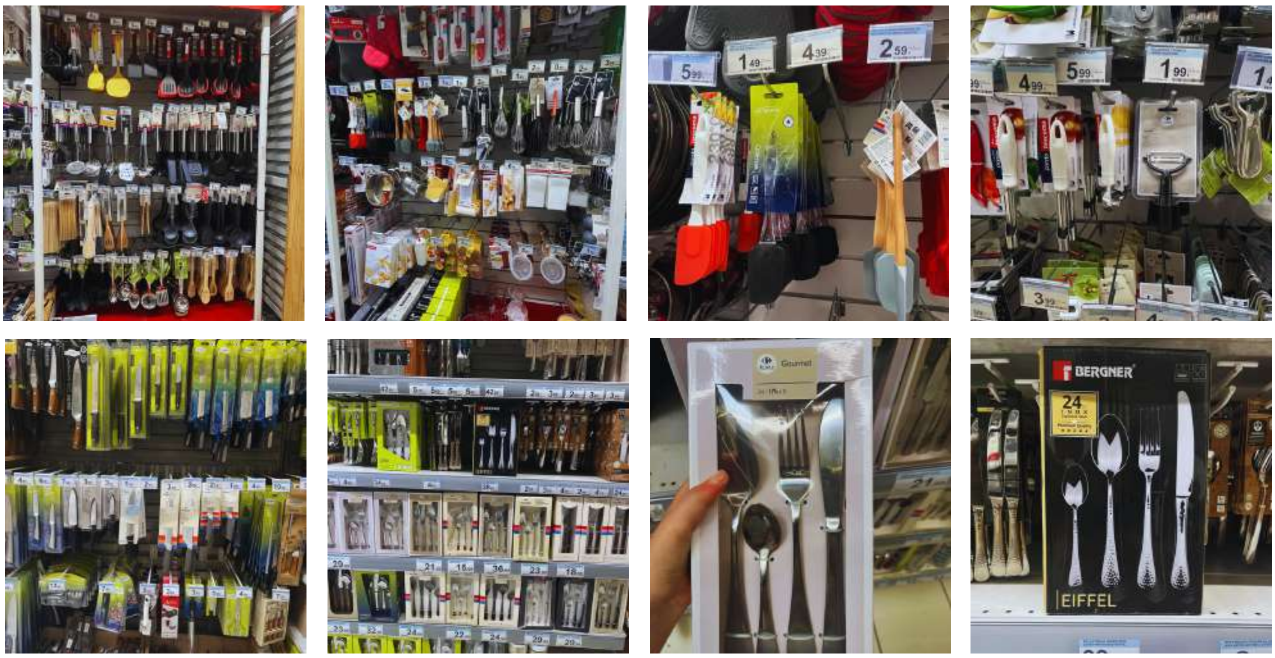
Arrangement of products in the store: All individual items are displayed **lying flat on shelves.**

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Cookware

Utensils



03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

Plates





Cutting boards

Other homeware products




03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Carrefous ES

- The store presents a comprehensive and thoughtfully **organized assortment of kitchen accessories** that effectively address the needs of a diverse customer base across multiple price segments. The premium range is characterized by **high-quality materials, refined craftsmanship, and attention to detail**. These products are attractively packaged, often in **boxes with transparent panels or detailed multilingual labels**, including sustainability certifications and brand logos, which enhance consumer confidence and appeal. Premium brands like **San Ignacio, Bergner, and Idealcasa** offer elegant dinnerware sets, durable wooden cutting boards, and sophisticated stainless steel cutlery, combining both aesthetics and functionality.

  Conversely, the medium and low-range products prioritize **accessibility** and everyday practicality without compromising basic quality standards. The **Home** brand, in particular, provides a wide array of affordable utensils, plates, and cutting boards that cater to budget-conscious consumers. These items are often **sold individually or in economical sets**, with simple packaging such as plastic wrapping and basic labels. Individual products are neatly displayed on higher shelves to maximize visibility and ease of access, while boxed sets are positioned on lower shelves to ensure clear differentiation and organized presentation.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Website: https://www.elcorteingles.es/

Leading Spanish department store chain known for its wide range of products, including fashion, electronics, home goods, and groceries.

The store evaluation conducted at **El Corte Inglés** focused on the availability and presentation of key product categories within the **Kitchen and Houseware department**.
El Corte Inglés, a premier Spanish department store chain, is renowned for its **upscale shopping experience** and extensive product variety spanning numerous categories.

The Madrid location visited featured a **sophisticated and spacious environment**, facilitating an organized and intuitive layout across all sections, especially compared with other evaluated stores. The kitchen and houseware categories were well represented, demonstrating El Corte Inglés' dedication to **providing a diverse and high-quality selection** for customers.

A notable aspect of this store was the clear division of product areas, often with **kitchen accessories and cookware showcased separately** from other home goods, allowing for enhanced focus and easier navigation.
This assessment aimed to analyze how El Corte Inglés executes category merchandising on-site, and to understand how the retailer curates its kitchen and houseware assortment to cater effectively to consumer preferences.

Target categories available during the Store Check:

- Ironing Boards
- Kitchen Accessories

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Ironing Boards

Types of products available in the store:

Ironing boards (different sizes) - in an individual part of the store. With a demonstration board displayed.

Types of materials available in the store: Cotton | Stainless steel.

Highlighted products: All products and brands are given equal prominence, given their specificity.

Main Brands:

vileda, brabantia, ROLSER, SONECOL HOME INDUSTRY, LEIFHEIT

Premium products/brands: Brabantia offers high-end ironing boards with **advanced safety features** and **long-term warranties**. One of their premium models includes a safety lock system and comes with a **10-year guarantee**, ideal for regular use with steam irons. These boards typically measure around **135×45 cm**, providing an extra-wide surface for more efficient ironing. The models present in the store have a price of **€110**.

Leifheit also falls within the premium category. A standard Leifheit model is priced at **€119**, with a size of **76×100 cm** and adjustable height. This board includes a steam iron rest and ergonomic design, offering excellent comfort and safety for frequent use.

Medium/low products/brands: Rolser, Vileda, and Sonecol offer practical, budget-friendly ironing boards for everyday use. **Rolser** models (**€79**) are stable and simple. **Vileda** boards, under €80 and about 110–120 cm long, are lightweight and easy to store. **Sonecol** offers basic boards at **€45–€50** (120×38 cm), ideal for occasional use.

Price range:

€45-€119
Ironing boards

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Packaging/product presentation: All products are packaged in **plastic**, with product descriptions available in at least **six languages** (English, Spanish, Italian, Portuguese, German, Czech) with relevant certification symbols clearly displayed on the packaging.

Arrangement of products in the store: The product's specificity makes it stand out little in the store. The ironing boards are placed upright on display racks, with all **brands mixed together**, making it difficult for any one brand or model to stand out. However, there is a demonstration model of this type of product in the store to attract customers' attention and make the store more dynamic.

At El Corte Inglés, the presentation of ironing boards **aligns with standard retail practices** seen in other major stores, with products grouped by category and accompanied by related household items. However, what sets El Corte Inglés apart is its **premium positioning**, both in product selection and overall shopping experience.

While the core assortment includes familiar mid-range brands such as **Rolser, Vileda, and Sonecol**, the store notably emphasizes more elevated options from premium brands like **Brabantia and Leifheit**. These higher-end models stand out through refined finishes, durable construction, and added safety or ergonomic features.
For instance, Brabantia boards often include **safety locks** and come with extended warranties, underscoring their long-term value.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Kitchen Accessories

Types of products available in the store:

Cookware | Utensils (from forlks, spoons, kives, ladles, etc) | Plates and Glasses | Cutting boards.

Types of materials available in the store:
Cookware: stainless steel; glass (lid)
Utensils: steel; plastic; wood
Cutting boards: wood; plastic
Plates: porcelain.

Highlighted products: Woks and frying pans from Tefal with 40% discount. Brand El Corte Inglés highlighted in all segments.

Cookware

Main brands:

Price range:

€19.95-€159
Individual pans

Premium products/brands: El Corte Inglés features a curated selection of **premium cookware brands** that emphasize **quality materials, durability, and design**. Notable among these are **Kuhn Rikon** and **Fissler**, with prices starting at **€105** and reaching up to **€159**, depending on size and specifications. These brands often use **high-grade aluminum or stainless steel**, offering excellent heat distribution and long-lasting performance. For example, a **Fissler 24 cm frying pan** is priced at **€105**, reflecting its premium build and finish. **Pressure cookers** from brands like **Fissler, Bra Design, and Magefesa** are also present, with stainless steel models ranging from **€83.95 to €149**, some displayed without packaging to highlight their build and function.

Medium products/brands: El Corte Inglés offers a wide range of **mid-range cookware** from brands like **Bra Design, Tefal**, and its **own labels**. Prices start at **€22.95** for smaller Bra Design pans and go up to **€60.95** for larger Tefal models. The store's **stainless steel range** is priced between **€25.95** and **€54.95**, often featuring glass lids. The more affordable **Zircon** aluminum line ranges from **€19.95 to €29.95**, perfect for everyday use.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Packaging/product presentation: Products are displayed individually, often with **plastic wrapping** or a **paper leaflet attached to the handle**, which provides all the relevant information such as **non-stick features, material, and care instructions**. In the case of pressure cookers, these are sold in **boxes** that include **detailed product descriptions**, translated information, and all necessary certification labels.

Arrangement of products in the store: The store features a more premium layout with wider aisles and a special focus on **El Corte Inglés brand** products. Frying pans are **hung neatly**, while pots and pressure cookers are displayed on **shelves**, with pressure cookers shown alongside their boxes.

Utensils

Main Brands:

Price range:

€1.95-€10.95
Individual utensil

€59.95-€89.95
Packs of 24 pieces

Premium products/brands: El Corte Inglés features premium utensils from brands like **Bra Design** and **Lékué**. Examples include stainless steel ladles priced around **€10.50**, serving spoons with steel handles from Bra Design at **€10.95**, and stainless steel whisks at approximately **€3.94**. These items offer durable materials and refined designs for customers seeking higher quality.

Medium products/brands: Mid-range options feature practical and affordable kitchen utensils designed for everyday use. Bamboo spoons from **ECI**, priced at **€4.95**, offer a natural and durable alternative for cooking and serving. Additionally, **El Corte Inglés** provides comprehensive 24-piece cutlery sets ranging from **€59.95 to €89.95**, with an effective cost of about **€1.95 per piece**, making them a convenient and budget-friendly choice for those looking to equip their kitchens with reliable, well-made utensils. Together, these products balance **quality and value**, appealing to customers seeking functionality without compromising on design or price.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Packaging/product presentation: All Cutlery is offered both in **24-piece sets** with full product info in the boxes and individually **without tags**, letting customers choose their quantity. Other utensils hang in aisles with **small tags on the handles**.

Arrangement of products in the store: Brands are generally mixed, except cutlery, which is displayed in **separate areas** highlighting full lines, especially the El Corte Inglés brand.

Plates

Main Brands:

Price range:

€6.95-€19.50
Individual plate

€39.95-€49.95
12 and 18 pieces

Premium products/brands: The premium range features exquisite porcelain tableware from renowned brands like **Cartuja** and **Vista Alegre**, known for their superior craftsmanship and timeless elegance. Individual plates from Cartuja are priced at **€15.55**, while Vista Alegre plates are available for **€19.50** each. These brands are known for their refined porcelain products, including plates, bowls, and other tableware, often **made in Portugal**.

Medium products/brands: El Corte Inglés' medium-range porcelain line offers **affordable yet reliable options** designed for everyday dining. White plates from the **El Corte Inglés** brand are priced at €6.95 each, making them accessible for regular use. Additionally, the store offers boxed sets of porcelain tableware, including **12-piece sets** priced between **€39.95** and **€49.95**, and 18-piece sets at **€44.95**. These sets typically include **plates, bowls, and other complementary pieces**. The medium range strikes a balance between practicality and value, appealing to customers who want good-quality tableware without the premium price tag. This range is prominently featured **in-store**, offering shoppers a convenient and cohesive selection under the trusted El Corte Inglés brand.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Packaging/product presentation: Individual plates **do not have labels or boxes.** However, **sets** of plates are already **available in boxes**, with images of the plates and the design, logo and product description translated into at least six languages.

Arrangement of products in the store: In-store, individual products are **displayed** throughout the homeware section for easy access. Sets are demonstrated on the **shelves above**, while their boxes are on the shelves below.

Cutting boards

Main Brands:

El Corte Inglés

Medium products/brands: El Corte Inglés presents a versatile range of cutting boards **under its own brand**, designed to cater to various kitchen needs and preferences. The collection includes practical **plastic boards** available at affordable prices of **€2** and **€4.95**, making them perfect for everyday use, easy maintenance, and quick food preparation tasks. These plastic boards come in different sizes to accommodate everything from small chopping jobs to larger meal prep. For customers seeking bigger options, the brand also offers cutting boards priced at **€12.95 (25x16x0.5cm)** and **€22.95 (wood, 1.9x20.6)**.

This diverse offering ensures that shoppers can find the right cutting board to match their cooking style and budget, all while benefiting from the trusted quality and value associated with the **El Corte Inglés brand**.

Price range:

€2-€22.95
Cutting board

Packaging/product presentation: All cutting boards are sold in **plastic**, with very small and very simple labels with size and composition information.

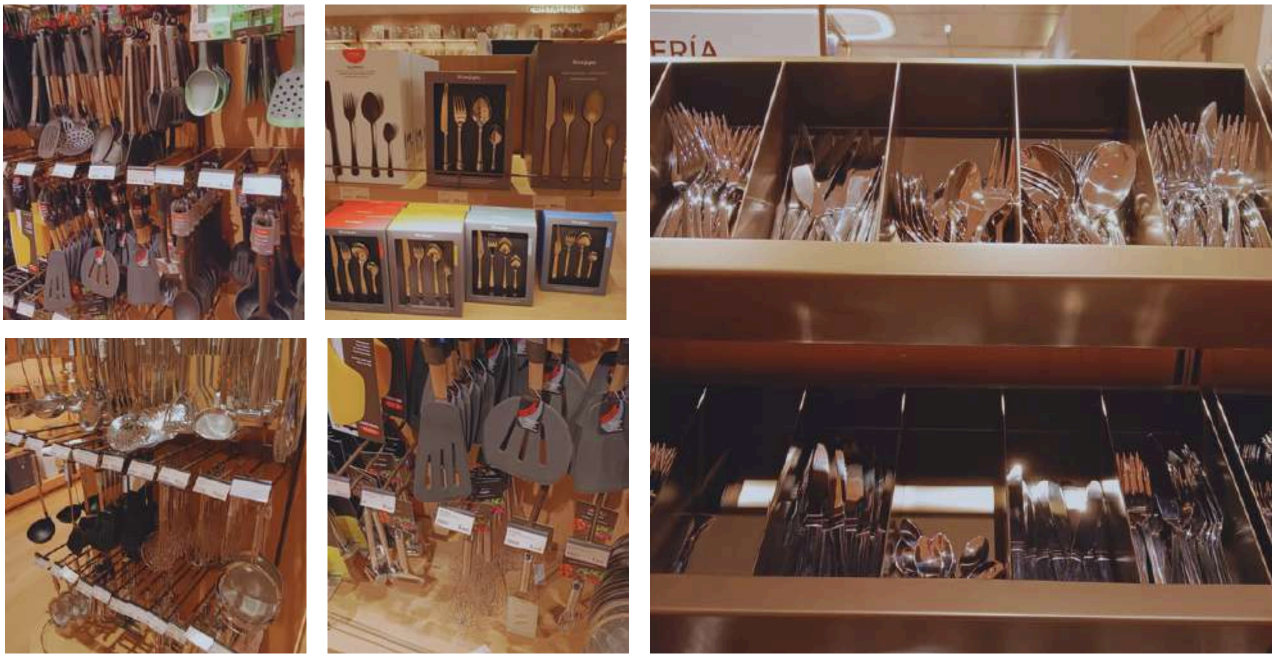
Arrangement of products in the store: The products are placed on shelves, **mixed regardless of size or composition**. In the store they are in a more enclosed area.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Cookware

Utensils



03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

Plates and other porcelain

Cutting boards

Other homeware products

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

El Corte Inglés

El Corte Inglés offers a **comprehensive and well-curated kitchenware selection** that caters to a wide range of culinary needs and styles. Their range includes **high-quality cookware from premium brands** like Bra Design and Tefal, alongside more affordable options under their own label, ensuring customers find reliable pans and pressure cookers suitable for any kitchen. The utensil collection spans from **practical medium-range items** such as bamboo spoons and comprehensive cutlery sets to **premium stainless steel pieces**, all thoughtfully organized to facilitate easy browsing. Porcelain tableware combines **elegance and durability**, with premium collections from renowned brands like Cartuja and Vista Alegre, as well as accessible sets and plates from the El Corte Inglés brand. Complementing this is a versatile offering of cutting boards in various sizes and materials, from **budget-friendly plastic to classic wooden options**.

Overall, El Corte Inglés presents kitchenware in a **more premium and sophisticated environment** than many other retailers. The store's careful product selection, clear brand differentiation, and well-organized display, especially the dedicated spaces for cutlery lines and emphasis on their own brand, reflect a **commitment to quality and customer experience**. Shoppers can expect a seamless blend of style, functionality, and value, making El Corte Inglés a top destination for those seeking to equip or upgrade their kitchen with trusted and elegant essentials.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Website: https://www.compraonline.alcampo.es/

Alcampo is a popular hypermarket chain in Spain known for offering a wide range of products, including groceries, household items, etc, all at competitive prices.

The store evaluation conducted at Alcampo focused on the availability and presentation of key product categories within the **Kitchen and Houseware department**.
Alcampo, a well-known Spanish hypermarket chain, is recognized for its wide product range and competitive pricing aimed at everyday shoppers.

The location visited featured a **practical and spacious layout**, designed to offer easy access and efficient navigation throughout the store. The kitchen and houseware sections were **adequately stocked**, reflecting Alcampo's focus on providing a broad selection of **functional and affordable products** to meet the needs of a diverse customer base.

A key characteristic of this store was the **size of kitchenware and houseware items**, allowing customers to conveniently browse a variety of household essentials in one place.
This assessment aimed to evaluate how Alcampo manages category merchandising on-site and how it balances assortment and accessibility to serve the preferences of value-conscious consumers.

Target categories available during the Store Check:

Bathroom Accessories

Ironing Boards

Kitchen Accessories

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Bathroom Accessories

Types of products available in the store:

Accessories for solid and liquid soaps | Toothbrush cups | Toilet brushes | Laundry baskets.

Types of materials available in the store: Plastic | Stainless steel | Ceramic (stone effect) | Glass.

Highlighted products: None of the bathroom products are highlighted in the store.

Main Brands:

actuel by Auchan

TATAY

Medium products/brands: Tatay stands out as a brand offering a more comprehensive range of bathroom products, with a strong emphasis on **sustainability**. Many of their items, including waste bins priced around **€12.99**, are made from **100% recyclable materials**, reflecting the brand's commitment to environmentally friendly manufacturing. Although the store visited carried only a **limited selection of Tatay products**, the brand is recognized for its higher-end offerings that combine quality, durability, and eco-conscious design.

Medium/low products/brands: More affordable quality products from **Actuel** - the official brand of Alcampo supermarkets. In terms of offers, the lowest priced are the **plastic ones**, with a price of **€0.98 per unit** (liquid soap cups). Within this type of product, a marble-effect dispenser from the same brand also costs **€9.98 per unit**. At the same time, a solid soap base costs **€4.99**, also from Actuel. So this is a brand with **more affordable accessories**, but with a range of more fragile materials (the best quality being metal, like a dustbin at **€12.99**).

Price range:

€0.98-€12.99
Individual products

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Packaging/product presentation: All the products, presented individually, come **without boxes or plastic.** Some may have labels attached describing the products and the materials they are made of (translated into six languages).

Arrangement of products in the store: In the store, all bathroom accessories are **mixed together**, regardless of brand, quality or type. To make a purchase, customers just need to pick up the quantities they want.

The Alcampo store presents a **more limited offering** in the bathroom accessories category compared to other retailers. The dedicated area for these products is **relatively small**, reflecting a **more focused selection** aimed primarily at essential and practical items rather than a broad or specialized assortment. Additionally, the variety of brands available is **noticeably fewer**, which may be a strategic choice aligned with Alcampo's overall value-driven positioning.

By concentrating on a narrower range of trusted and affordable brands, the store aims to meet the basic needs of its customer base **without overwhelming shoppers with excessive options.** While this approach limits brand diversity, it supports Alcampo's emphasis on accessibility, competitive pricing, and straightforward shopping experiences. Customers seeking more extensive or premium bathroom accessory selections might find a wider variety at specialty stores or larger department stores, whereas Alcampo caters effectively to those **prioritizing convenience and essential functionality in their purchases.**

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Ironing Boards

Types of products available in the store:

Ironing boards (different sizes) - next to other clothing accessories for the home.

Types of materials available in the store: Cotton | Stainless steel.

Highlighted products: All products and brands are given equal prominence, given their specificity.

Main Brands:

vileda

SONECOL HOME INDUSTRY

actuel by Auchan

Premium products/brands: At **Alcampo**, Vileda positions itself as a more **premium brand** within the ironing board category, offering robust and durable products that stand out for their quality. The ironing boards are priced at **€36.99, €47.90, and €78.99**, with the variation in price primarily reflecting differences in size and **additional features**. Despite the price differences, all Vileda boards maintain a higher standard of construction compared to many competing brands available in the store.

Medium products/brands: The **Actuel** brand, although Alcampo's own "white label," stands out for offering a **broader and more diverse range of products** compared to other brands in the store. This variety allows customers to choose from multiple options tailored to different needs and preferences. Prices for Actuel products range from **€29.98 to €55.99**.

Price range:

€14.99-€78.99
Ironing boards

Low products/brands: In the store, **Sonecol** positions itself as the **most affordable option** within the ironing board category, targeting budget-conscious customers who prioritize basic functionality over advanced features. Priced under **€14.99** and **€25.99**, Sonecol's ironing boards have smaller sizes.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Packaging/product presentation: Some products are packaged in **plastic**, with product descriptions available in at least **six languages** (English, Spanish, Italian, Portuguese, German, Czech) with relevant certification symbols clearly displayed on the packaging. Others are loose (without any protection).

Arrangement of products in the store: The product's specificity makes it stand out little in the store. The ironing boards are placed upright on display racks, with all **brands mixed together**, making it difficult for any one brand or model to stand out.

- Alcampo's ironing board selection reflects the store's focus on offering **practical, value-oriented options** for a broad customer base. The range includes budget-friendly choices like **Sonecol**, which caters to those seeking basic, affordable boards under €15, as well as more premium options from brands like **Vileda**, which provide larger and sturdier models priced between €37 and €79.

  Additionally, Alcampo's own Actuel brand offers a varied mid-range selection that balances **quality and price**, giving shoppers a versatile set of options.

  While the assortment may be narrower compared to specialty stores, Alcampo successfully covers essential customer needs with **clear price differentiation** and a mix of trusted brands, making it a convenient destination for everyday ironing solutions.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Kitchen Accessories

Types of products available in the store:

Cookware | Utensils (from forlks, spoons, kives, ladles, etc) | Plates and Glasses | Cutting boards.

Types of materials available in the store:
Cookware: stainless steel; glass (lid)
Utensils: steel; plastic; wood
Cutting boards: wood; plastic
Plates: porcelain.

Highlighted products: Actuel brand (part of Alcampo) is highlighted through different categories.

Cookware

Main brands:

Tefal
Magefesa
MONIX
actuel by Auchan
vitrinor

Price range:

€4.99-€112.90
Individual pans

€46.99-€80
Packs of 2 to 5

Premium products/brands: At Alcampo, pressure cookers are mainly **sold individually** from well-known premium brands like **Magefesa, Tefal, and Monix**, with prices ranging from **€61.99 to €112.90**. These models offer **quality, safety, and durability for frequent use.**
The store also features premium cookware sets, such as a 5-piece Magefesa set priced at **€80**, along with individual frying pans, starting at just over **€11** for Magefesa and **over €40 for Tefal**. This mix of sets and standalone items highlights Alcampo's strategy to offer **quality cookware at accessible prices**, appealing to customers seeking reliable branded options.

Medium/low products/brands: The most affordable options at Alcampo come from its private label Actuel, which offers a **budget-friendly range of frying pans** suitable for everyday use. Prices start at just **€4.99** for basic models, making them accessible to all households. The brand also features **individual pans priced at €13.99**. For those looking for a more complete solution, Actuel offers a set of **two pans for €39.99**, providing better value while maintaining the brand's focus on practicality.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Packaging/product presentation: Products are displayed individually, often with **plastic wrapping** or a **paper leaflet attached to the handle**, which provides all the relevant information such as **non-stick features, material, and care instructions**. In the case of sets, these are sold in **boxes/wrapped in plastic** that include **detailed product descriptions**, translated information, and all necessary certification labels.

Arrangement of products in the store: Cookware area organized in the same way as other supermarkets. **Frying pans hang next to each other**, regardless of brand or composition. Pans and other cookware are **displayed on shelves**, with boxes lower down (in the case of pressure cookers).

Utensils

Main Brands:

Price range:

€1.50-€21.95
Individual utensil

€25-€40
Packs of 24 pieces

Premium products/brands: At Alcampo, **Arcos** and **Monix** lead the premium kitchen accessories segment. Arcos offers **high-quality knives** and utensils priced between **€10 and €21.95**, available both individually and in boxed sets, ideal for home cooks seeking durability and precision. **Monix** complements its cookware with sturdy **stainless steel utensils** and tools, typically priced from **€10 to €15**. These products are presented with branded packaging and are positioned to highlight their professional quality and long-term value.

Medium/low products/brands: In the mid-to-low range, **Actuel and Fackelmann** offer practical and affordable solutions. Actuel, Alcampo's store brand, features **individual utensils** starting at **€1.50**, and 24-piece cutlery sets priced between **€25 and €40**, focusing on functionality and value. **Fackelmann** provides a slightly higher finish, with utensils priced between **€3.99 and €9.99**, including a range of everyday kitchen tools in plastic, wood, or silicone.
These products are displayed on hooks with basic tags, grouped by use, and offer accessible choices for daily cooking needs.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Packaging/product presentation: All Cutlery is offered both in **24-piece sets** with full product info in the boxes and individually **without tags**, letting customers choose their quantity. Other utensils hang in aisles with **small tags on the handles**.

Arrangement of products in the store: Kitchen accessories are hung by function, with **premium items next to brands like Actuel**. Cutlery is offered both in boxed sets in **lower shelves**.

Plates

Main Brands:

actuel by Auchan
Santa Clara DESDE 1929
Luminarc
arcopal

Premium/medium products/brands: At Alcampo, the tableware selection includes both **premium and medium-range options**, featuring brands like **Santa Clara, Luminarc, and Arcopal**. Santa Clara represents the premium tier, offering porcelain dishes priced around **€38.99 for 12 pieces**, with refined designs and finishes suited for more formal dining. **Arcopal** offers durable tempered glass plates typically priced between **€54.99** for 18 pieces, known for their **practicality and resistance to breakage**. Luminarc provides a wide variety of everyday tableware, both in sets and individual items, with prices ranging from **€16.99** (18 pieces small) to **€54.99** (19 pieces normal size), combining affordability with modern, simple styles.

Price range:

€1.15-€5.85
Individual plate

€16.99-€54.99
18 and 19 pieces

Low products/brands: Alcampo offers a range of **individual disposable plastic plates** at **€1.15** each. From an even more sustainable perspective, the brand also offers **reusable plastic accessories** for between **€1 and €3** each under the **Actuel** brand. Although this brand is more affordable and in a lower range, it is the one that stands out the most, with displays on shelves and tables in the middle of the store. Alongside the individual offers of procelain at max **€5.85**, Actuel also offers **18-piece porcelain sets** at **€23.99**.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Packaging/product presentation: Individual plates **do not have labels or boxes.** However, **sets** of plates are already **available in boxes**, with images of the plates and the design, logo and product description translated into at least six languages.

Arrangement of products in the store: In-store, individual products are **displayed** throughout the homeware section for easy access. Sets are demonstrated on the **shelves above**, while their boxes are on the shelves below.

Cutting boards

Main Brands:

actuel by Auchan

ARCOS

Price range:

€2.50-€17.50
Cutting board

Medium/low products/brands: The cutting board category features a diverse range of options catering to both everyday users and those seeking more durable, professional-quality products. The two main brands present are **Actuel and Arcos**. Actuel offers affordable and practical cutting boards in various sizes and materials, including **plastic and bamboo**. Prices start at around **€2.50** for small plastic boards, with mid-sized versions priced between **€4.99 and €9.99**, depending on material and thickness. Larger bamboo boards can reach up to €14.9. These boards are ideal for everyday kitchen tasks, and their lightweight design makes them easy to store and clean.

On the other hand, **Arcos** provides a medium selection, with cutting boards made from high-quality materials such as **solid wood** or **antibacterial polymer surfaces**. Prices are marked as **€17.50.**

Packaging/product presentation: All cutting boards are sold in **plastic**, with very small and very simple labels with size and composition information.

Arrangement of products in the store: The products are placed on shelves, **mixed regardless of size or composition**.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Cookware







Utensils








03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Plates and other porcelain








Cutting boards

Other accessories



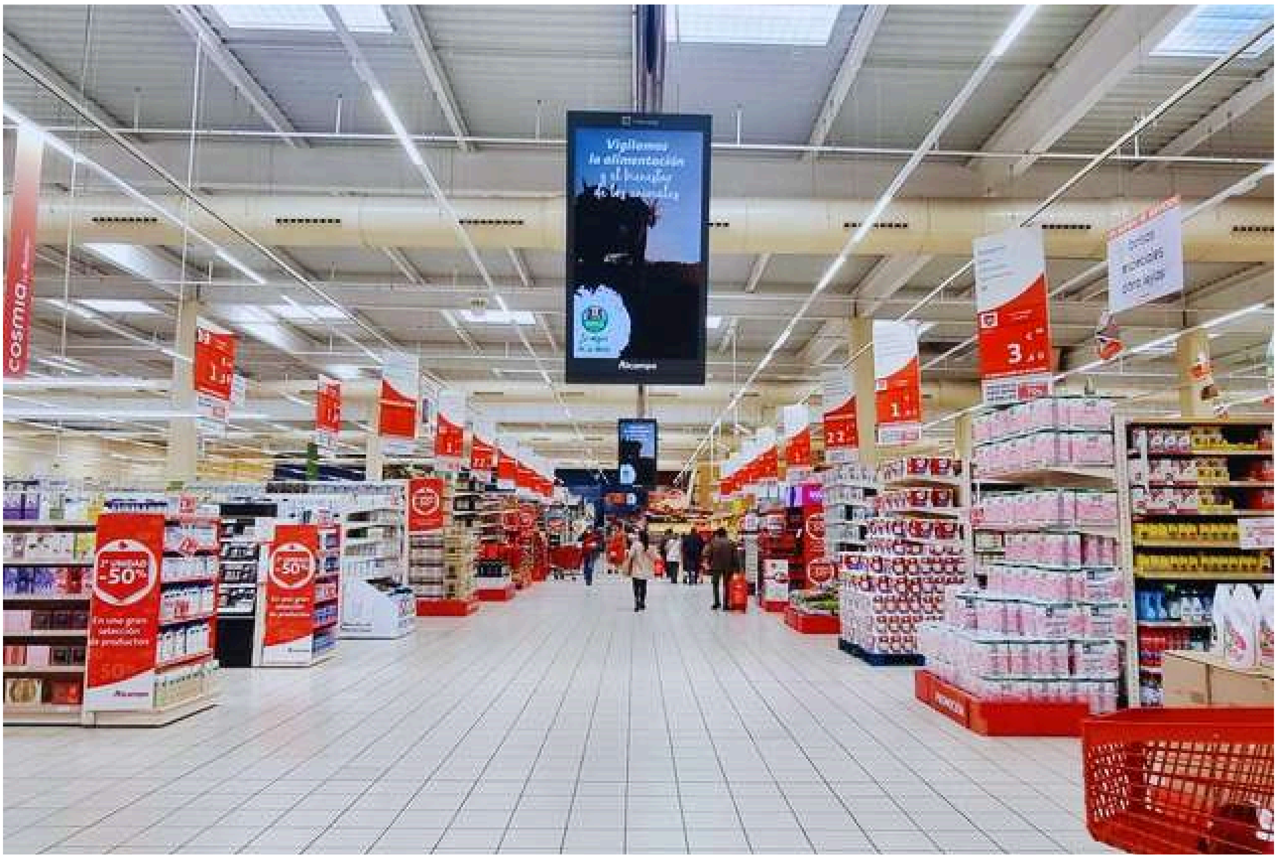

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Alcampo (Auchan)

Alcampo's kitchenware offer presents a **well-balanced mix** of affordability and quality across all key categories. From cutting boards to cookware, utensils, and tableware, the store provides **accessible solutions** through its **Actuel** brand, while also incorporating premium options from well-known names like **Arcos, Monix, and Santa Clara**.

Entry-level products focus on **functionality and price**, with a wide selection of everyday items such as plastic cutting boards, aluminum pans, and basic utensils. At the same time, Alcampo includes more durable and refined alternatives, like **tempered glass plates** from Arcopal, **stainless steel cookware**, and **solid wood accessories**, at slightly higher price points.

The assortment is clearly segmented, offering flexibility for different budgets and needs, with most products sold **both individually and in sets.** While the store leans more toward practicality than luxury, it successfully covers a **broad consumer base**, from first-time home cooks to more experienced users looking for reliable kitchen tools.



03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Website: https://www.lidl.es/

Popular international discount supermarket chain known for offering a wide range of products at competitive prices.

The store visit to Lidl focused on evaluating the **range and presentation of kitchen and houseware products** within the store. **Lidl**, recognized internationally for its emphasis on affordability and efficiency, offers a carefully curated selection of **essential household items** designed to meet the needs of **budget-conscious shoppers.**

The store layout is compact and thoughtfully organized, allowing for easy navigation despite limited space. While Lidl's assortment is narrower compared to larger retailers, the focus remains on **practical, everyday kitchenware and houseware** that combine functionality with attractive pricing. This approach ensures customers can find reliable **basic products** without overwhelming choice.

This evaluation aimed to assess how Lidl balances product variety, store space, and value to deliver a convenient and cost-effective shopping experience within the kitchen and houseware segment, catering effectively to its target market.

Target categories available during the Store Check:

Bathroom Accessories

Kitchen Accessories

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Bathroom Accessories

Types of products available in the store:

Accessories for solid and liquid soaps | Toilet brushes.

Types of materials available in the store: Plastic.

Highlighted products: All products are presented in the same place and in the same way.

Main Brand:

LIVARNO home

Price range:

€2.99
Individual products

€3.99
Pack with 2 pieces

Low products/brands: At Lidl, the bathroom accessories category is represented exclusively by the store's private label, **Livarno**, which positions itself within the **low-price, entry-level segment**. Unlike other retailers that offer a mix of national and international brands across various price points, Lidl focuses **solely on Livarno** for this category, maintaining its strategy of simplified, value-driven offerings.

The product selection is limited but practical, with a **small number of essential items** available. For example, **plastic toilet brushes** are priced at just **€2.99**, and a two-piece set of refillable shampoo and shower gel dispensers is available for **€3.99**. These products are functional and affordable, designed for **basic use** rather than design or durability. Materials used are typically **lightweight plastic**, and the items are packaged with **minimal branding or presentation**, reflecting their budget-oriented positioning.

This narrow yet purposeful assortment aligns with Lidl's overall retail approach: offering **essential household products at low prices**, without extended variety or premium alternatives.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Packaging/product presentation: Toilet brushes are presented individually with **paper hanging from the handle** with product specifications. Bathroom bottle boxes are made of a more recycled material with **product translations** and **certification logos**.

Arrangement of products in the store: Products displayed on low shelves, all mixed up and without specific organization.

- Lidl's bathroom accessories offer is **modest in size** but strategically **aligned with the retailer's value-focused approach**.

  The category is exclusively represented by Lidl's private label **Livarno**, which emphasizes **practicality and affordability** over variety or premium design. The range includes essential items such as toilet brushes priced at €2.99 and a two-piece refillable dispenser set for €3.99 - clearly positioned for everyday, no-frills use.

  While the assortment is far smaller than in larger or more premium stores, it **meets the needs of shoppers** looking for **basic, low-cost solutions**. There is no presence of premium or branded alternatives, and materials used are typically lightweight and functional, **without decorative finishes**.

  One noteworthy aspect is the eco-conscious packaging: dispensers come in **simple cardboard sleeves**, while toilet brushes are shrink-wrapped with minimal labeling, both reflecting Lidl's effort to reduce plastic and waste.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Kitchen Accessories

Types of products available in the store:

Utensils (from ladles, to trays, potato mashers and ice molds) | Plates.

Types of materials available in the store:
Utensils: plastic
Plates: porcelain.

Highlighted products: All products are presented in the same aisle and in the same way.

Utensils

Main brands:

LIVARNO home

Price range:

€1.99-€3.99
Individual utensils

Low products/brands: Kitchen utensils are offered exclusively under the **Livarno brand**, with prices ranging between **€1.99 and €3.99**. The assortment includes basic cooking tools such as **ladles, spatulas, whisks, and serving spoons**, all designed to meet essential kitchen needs.

These utensils are made from **simple, lightweight materials like plastic or silicone**, offering a balance between **affordability and everyday functionality**. The design is minimal, and the products are typically presented on hanging displays with small tags attached to the handles, providing **basic information.**

This offering reflects Lidl's commitment to **practical, low-cost kitchenware**, catering to consumers seeking reliable tools without paying for branding or design extras.

While the range lacks variety in terms of colors or advanced features, it **effectively covers the core utensils** needed for daily cooking at an accessible price point.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Packaging/product presentation: All the products, presented individually, come **without boxes or plastic**. Some may have labels attached describing the products and the materials they are made of (translated into six languages).

Arrangement of products in the store: In the store, all accessories are **mixed together**. To make a purchase, customers just need to pick up the quantities they need.

Plates

Main brands:

LIVARNO home

Price range:

€4.99
Set 2 plates

Low products/brands: Lidl offers a **set of two plates** under the **Livarno** brand priced at **€4.99**. These plates are made from basic, lightweight materials, reflecting their **budget-friendly nature** rather than durability or premium quality.
The design is simple and functional, with a plain finish that suits everyday use but lacks decorative or high-end features.
This set targets **cost-conscious shoppers** who need practical kitchenware for occasional or everyday meals without investing in more expensive options.

While not designed for heavy-duty use, the plates serve well as a**ffordable, easy-to-replace items**, fitting Lidl's overall strategy of providing essential household products at **accessible prices**. Their minimal packaging and straightforward presentation further emphasize value and simplicity.

Packaging/product presentation: Plates and bowls in sets are presented inside of **boxes**, with the logo of the brand, as well as information of its materials. There are also certifications logos, if applicable.

Arrangement of products in the store: In the store, plates are **mixed together** with other kitchen accessories. To make a purchase, customers just need to pick up the boxes they want.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Utensils

Plates

Other accessories/products

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Lidl ES

Lidl's kitchen accessories range, offered primarily under the **Livarno brand**, focuses on providing **basic, affordable essentials** for everyday cooking and dining needs. The assortment covers a variety of products, from utensils to plates, all designed with **simplicity and functionality** in mind.

Overall, Lidl's accessories emphasize functionality and cost-effectiveness, appealing to shoppers who prioritize **essential household items at low prices**. While the range lacks variety and premium features found in higher-end retailers, it effectively meets the basic needs of customers seeking affordable, no-frills kitchenware.

The packaging and presentation further reflect Lidl's commitment to simplicity and value, reinforcing its position as a **retailer focused on accessible everyday products.**

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK

Supermercado Día

Website: https://www.dia.es/

Popular discount supermarket in Spain, offering affordable groceries with hundreds of stores in urban and residential areas.

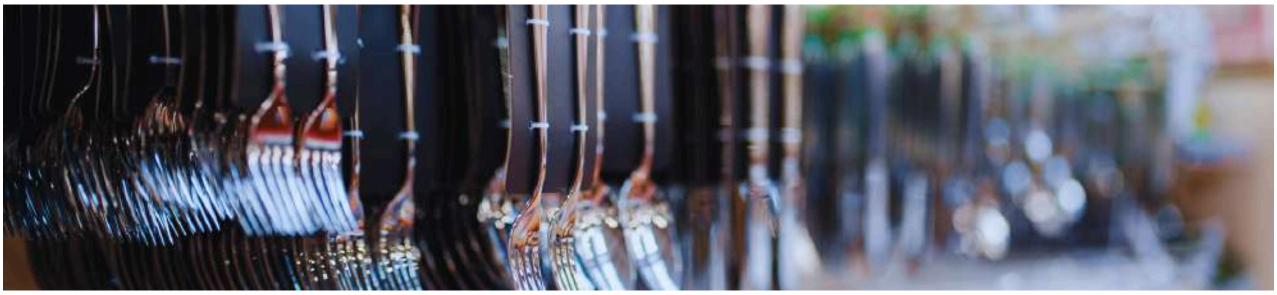
The store check at Día was conducted using the **same structured methodology** applied across all visits, ensuring consistency and comparability in the evaluation process. This included examining **product assortment, category presence, pricing, layout**, and overall **customer experience**.

In this case, although the supermarket was **logistically well-positioned** within the visit route and met the expected operational criteria, it notably lacked any **homeware or kitchenware products**. This absence stood out in comparison to other stores visited as part of the same study.

A key factor behind this limited product range is the store's **smaller physical footprint**. Due to space constraints, the store appears to focus almost **exclusively on groceries** and **fast-moving consumer goods**, which are essential for day-to-day needs. Non-food categories like homeware and kitchenware often require more shelf space and are therefore **deprioritized** in smaller store formats. This strategic choice reflects an effort to optimize space for products with higher turnover rates and stronger demand in compact **urban locations**.
This insight is particularly important when analyzing the brand's overall product distribution strategy. It demonstrates how local Día store formats can **vary significantly** in terms of category offering, based on size, location, and target customer base.

While this specific store did not carry certain non-food items, it is important to emphasize that **other Día supermarkets**, especially larger ones or those located in different regions, may offer a more extensive range that includes homeware and kitchenware. Additionally, **Día's online platform** serves as a valuable complement to its physical stores. Customers looking for a broader selection of products, including categories not available in smaller stores, can access them via the e-commerce site, which helps **bridge any gaps in the in-store offer** and reinforces the brand's commitment to accessibility and convenience.

03. IDENTIFICATION OF THE MAIN DISTRIBUTION CHANNELS & STORE CHECK



In conclusion, the store checks carried out in the five major retail chains - **El Corte Inglés, Carrefour, Alcampo, Lidl, and Día** - highlight clear differences in strategy, assortment, and in-store execution within the homeware and kitchenware segments, reflecting each store's market positioning and customer focus.

El Corte Inglés stands out for its **premium positioning**, offering a refined shopping environment, a wide selection of products, and an emphasis on well-known or exclusive brands. The store layout is **carefully designed**, with dedicated and clearly segmented areas, premium packaging, and informative product displays, particularly in kitchenware, ironing boards, and bathroom accessories.

Carrefour and Alcampo, as large-format retailers, offer broad assortments that include **low, medium and premium brands** across multiple categories. Their stores allow for effective segmentation by product type and brand, making it easy for customers to compare offers. These stores are ideal for shoppers looking for **variety, value, and a wide price range** in kitchen and household goods.

In contrast, **Lidl** presents a **more limited and low-cost assortment**, focused on its private label brand (**Livarno**). The offer is streamlined and heavily oriented toward affordability, with **basic utensils, occasional cookware, and small bathroom accessories.** Despite its smaller range, the brand still maintains a consistent value-for-money proposition across all available items.

Regarding **Día**, the visit to the selected store showed that the **homeware and kitchenware categories were absent**, suggesting that this segment is not a priority in at least some of its store formats. However, further checks would be needed to generalize this across the chain.

These differences reinforce how each retailer tailors its strategy to a **specific consumer profile**, shaping the way shoppers access and experience household products across the Spanish market.

04.
IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

To better understand the distribution landscape of kitchenware and houseware products in Spain, this chapter provides an in-depth analysis of the **15 largest importers** and wholesalers that play a significant role in the sector.

For each importer, the analysis focuses on the following core aspects:

- **Product Categories:** A breakdown of the main types of kitchenware and houseware offered, including cookware, utensils, tableware, storage solutions, and small kitchen appliances.

- **Brand Portfolio:** An assessment of the importer's brand mix, detailing the balance between internationally recognized brands, domestic brands, and private label products, as well as the positioning and prominence of each.

- **Client Base:** An overview of the main client segments served, including retailers, distributors and hospitality businesses.

This chapter is designed to offer **actionable insights for stakeholders** aiming to enter or expand their presence in the Spanish market. By identifying the key wholesale players, it helps clarify how the kitchenware and houseware sector is structured and accessed, ultimately **supporting strategic decision-making and market entry planning.**

Ultimately, this chapter serves as a **practical resource** for companies seeking to navigate Spain's **competitive kitchenware and houseware market** by offering a clear overview of the **leading importers and wholesalers**. It highlights where **key opportunities** exist within the supply chain and how best to approach these players to gain **market access** and build **successful distribution partnerships.**

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

4.1.1. Major Importers and Wholesalers for Cookware, Plastic Kitchenware, Cutlery, Home Organizers, Ironing Boards, and Bathroom Accessories

Arte Regal Import

Company Brief Description: Arteregal is a Spanish company founded in 1997, specializing in the B2B import and distribution of household products. Their extensive portfolio includes dinnerware, cutlery, kitchen utensils, ironing boards, glassware, ceramics, storage solutions, and decorative accessories. Serving over 50 countries, Arteregal has established itself as one of the leading importers in Spain's houseware and kitchenware sector. The company combines efficient logistics with a strong commitment to building long-term commercial partnerships.

Website: https://www.arteregal.com/b2b/es/

Address: Camino Masía del Conde, 1-3 Pol. Industrial Masía del Conde, 46393 Loriguilla, Valencia, Spain

No. of Employees in Spain: Between 50 and 200

Global Turnover: 5 million $

Type of Clients: Retailers, Distributors, HoReCa

Main Brands Offered & Country of Origin: -

Source: Arte Regal | LinkedIn | Rocket Reach

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Bull Importer

Company Brief Description: Bull Importer is a Spanish company, established in 1995, that specialises in helping businesses import and manufacture products primarily from Asian countries such as China, India, Turkey, Bangladesh, and Vietnam. The company focuses on sourcing a variety of products including houseware, kitchenware, home decor, bathroom accessories, furniture, textiles, and other consumer goods. They offer comprehensive services that cover supplier verification, quality control, logistics, customs management, and product certifications to ensure a smooth and cost-effective importing process. Their goal is to help companies reduce costs while maintaining high standards and managing risks throughout the entire supply chain.

Website: https://bullimporter.com/

Address: Calle Buenaventura, 4 La Vaguada, 30394 Cartagena (Murcia), Spain

No. of Employees in Spain: 5

Global Turnover: No public information is available

Type of Clients: Retailers, Distributors

Main Brands Offered & Country of Origin: -

Source: Bull Importer | Rocket Reach

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Cronos Imports

Company Brief Description: Cronos Imports S.L. is a Spanish company, with over 30 years of experience, that imports and wholesales consumer electronics and household accessories, with a special emphasis on kitchen gadgets and small appliances. Their product range includes smart kitchen tools, cooking accessories, and innovative household devices designed to make everyday kitchen tasks easier and more efficient. They serve retailers and online sellers across Europe, providing modern, affordable kitchen solutions that combine functionality with stylish design. Their clients are mainly businesses looking to offer trendy and practical kitchen accessories to their customers.

Website: https://cronossl.com/

Address: Calle Cronos (1 Planta) 16 28037, Madrid, Spain

No. of Employees in Spain: Between 2 and 10

Global Turnover: Less than 2 million $

Type of Clients: Retailers

Main Brands Offered & Country of Origin: -

Source: Cronos Imports | Dun&Bradstreet | LinkedIn | Infoempresa

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Productos de Todo el Mundo (PTM)

Company Brief Description: Productos de Todo el Mundo is a Spanish wholesale distributor based in Barcelona that offers a wide range of household and kitchenware products. In the kitchen category, they provide cookware, bakeware, kitchen utensils, cutlery, food storage containers, tableware (plates, cups, glasses), and kitchen gadgets. For household products, they offer bathroom accessories, home organization solutions like storage boxes and racks, cleaning tools, and decorative items. They serve retailers and professionals with high-quality, affordable items and also provide customization services for glassware and promotional products. Their focus is on delivering diverse, practical products to help businesses meet customer needs.

Website: https://www.productosdetodoelmundo.com/

Address: Calle Muntaner, 269, Barcelona, 08021, Barcelona, Spain

No. of Employees in Spain: -

Global Turnover: No public information is available

Type of Clients: Retailers

Main Brands Offered & Country of Origin: Bormioli Rocco (Italy), Kela (Germany), Snips (Italy), Yamazaki (Japan), Comas (Italy)

Source: PTM | Empresite

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Grupo SDM

Company Brief Description: Grupo SDM is a Spanish company founded in 2003 that specializes in importing and distributing furniture and lighting, but also sell household accessories. They serve professionals like retailers, architects, and hospitality businesses across Spain, Portugal, and other countries. They focus on quality, sustainability, and functional design to meet the needs of modern homes and businesses.

Website: https://www.gruposdm.com/es/

Address: Calle Ignacio Aldecoa 15, 29004 Málaga, Spain

No. of Employees in Spain: Between 10 and 50

Global Turnover: 5.9 million $

Type of Clients: Retailers, Distributors, HoReCa

Main Brands Offered & Country of Origin: -

Source: Grupo SDM | LinkedIn | Rocket Reach

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Soler Hispania

Company Brief Description: Soler Hispania, established in 1974, is a prominent Spanish wholesaler specializing in tableware, kitchenware, and home accessories. Their extensive product range includes over 4,000 items crafted from materials such as porcelain, glass, crystal, melamine, plastic, stainless steel, iron, and wood. These products cater to various sectors, including HORECA (hotels, restaurants, and catering), retail, supermarkets, e-commerce, and B2B markets.

Website: https://www.solerhispania.com/

Address: Calle Ignacio Aldecoa 15, 29004 Málaga, Spain

No. of Employees in Spain: -

Global Turnover: 15 million $

Type of Clients: Retailers, HoReCa

Main Brands Offered & Country of Origin: Quttin (Spain), Duralex (France), Inde (Spain), Bormioli Rocco (Italy)

Source: Soler Hispania | Rocket Reach

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

ITEM Internacional ES

Company Brief Description: ITEM International ES is the local branch of the global ITEM International group, established in Spain in 1984. This Spanish subsidiary is a major wholesaler and importer of giftware, household items, home decoration, and kitchen accessories, offering more than 20 000 distinct products. In kitchenware and drinkware, they provide items such as glass drink dispensers with bamboo lids, rattan and bamboo tissue-box covers, and various table accessories. Their bathroom accessories selection includes coordinated sets made from glass, bamboo, or stoneware, featuring soap dispensers, toothbrush holders, soap dishes, and tissue-box organizers. Their home décor line emphasizes simplicity and utility, with natural-style storage solutions reflecting a rustic and modern aesthetic.

Website: https://www.itemint.com/es/

Address: C/ Ferrocarril 7, Polígono Industrial Can Estapé 08755, Castellbisbal, Barcelona, Spain

No. of Employees in Spain: 95

Global Turnover: More than 50 million € (≈*59 million $**)

Type of Clients: Retailers, Distributors

Main Brands Offered & Country of Origin: -

Source: ITEM International ES | Bloomberg LEI | Infoempresa

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Plus Calidad Importaciones

Company Brief Description: Plus Calidad Importaciones, founded in 2017, is a Spanish wholesale importer specializing in practical home products under its own brand. In kitchenware, they offer items such as cookware, utensils, storage containers, and small accessories designed for everyday use. Their home decor range includes functional yet stylish pieces like organizers and decorative storage solutions.

Website: https://pluscalidad.com/

Address: C/ Peña Salón 50, Naves 1-2 33192 Polígono de Silvota Llanera - Asturias, Spain

No. of Employees in Spain: Between 10 and 50

Global Turnover: No public information is available

Type of Clients: Retailers

Main Brands Offered & Country of Origin: Private Label

Source: Plus Calidad | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Almacenes J. Biedma S.L.

Company Brief Description: Almacenes J. Biedma S.L. is a Spanish wholesale distributor specializing in a diverse range of household products. Within its key categories - kitchenware, bathroom accessories, and home organization - the company offers a diverse range of items including plate sets, drinking glasses, cutlery, and kitchen storage containers. In the home organization and bathroom segment, they provide ironing boards, towel supports, organizers, and small furniture pieces designed for practical use around the house.

Website: https://ibiedma.org/

Address: Carr. de Circunvalación, 37, 23400, Úbeda (Jaén)

No. of Employees in Spain: Between 10 and 50

Global Turnover: No public information is available

Type of Clients: Retailers

Main Brands Offered & Country of Origin: -

Source: iBiedma | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Casa y Menaje 2015

Company Brief Description: Casa y Menaje 2015 S.L. is a Spanish wholesale distributor with over 30 years of experience serving professional clients such as large retailers, supermarkets, and distributors across Spain and worldwide. Their extensive online product range includes more than 10 000 items in permanent stock, covering kitchenware (ceramic plates, glassware, plastic containers, frying pans), home organization products (basketry and wicker storage), seasonal items, and bathroom accessories.

Website: https://www.casamenaje.com/

Address: C/ Fundidors S/N - Polígono Industrial El Carrasco, Olleria, Spain

No. of Employees in Spain: Between 50 and 200

Global Turnover: No public information is available

Type of Clients: Retailers, Distributors

Main Brands Offered & Country of Origin: Moulinex (France), Arcos (Spain), De Buyer (France), Mondex (Poland), Princess (Netherlands)

Source: Casa y Menaje 2015 | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Versa

Company Brief Description: Versa Home S.A., founded in 1946 in Spain, is a well-established wholesale importer and distributor specializing in home organization, bathroom accessories, kitchenware, lighting, and decorative accessories. With a catalog of over 5 000 regularly updated products, they serve professional clients exclusively through a B2B online platform. Their home décor offerings include decorative vases, clocks, and wall art; kitchenware features dinnerware sets, glassware, and serving trays; and decorative accessories cover items like cushions, candles, and seasonal decorations.

Website: https://www.versa-home.es/

Address: Polígono Industrial ZELATA - Nave A Barrio Boroa S/N, Amorebieta, Vizcaya 48340, Spain

No. of Employees in Spain: Between 50 and 200

Global Turnover: No public information is available

Type of Clients: Retailers, Distributors

Main Brands Offered & Country of Origin: Private Label

Source: Versa | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

ADi

ADI Iberia

Company Brief Description: ADI Iberia, based in Zaragoza is a leading wholesale distributor specializing in household and hospitality products. They offer an extensive catalogue of over 10 000 items including tableware, kitchenware, furniture, and home décor & organization, sourced from around 250 suppliers. Serving more than 7 100 business clients across Spain and Portugal, the company uses advanced logistics and technology to efficiently manage its operations.

Website: https://adiberia.com/

Address: C/ Río Piedra s/n, Polígono Industrial, 50830 Zaragoza, Spain

No. of Employees in Spain: Between 200 and 500

Global Turnover: 56 million € *(≈66 million $*)*

Type of Clients: Retailers, Distributors, HoReCa

Main Brands Offered & Country of Origin: Moa by Vinthera (Spain), Luminarc (France), Pyrex (France), Curver (Netherlands), Vileda (Germany)

Source: ADI Iberia | LinkedIn | Infoempresa

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

AFT Group

Company Brief Description: A Forged Tool (AFT Group), founded in 1945, is a major B2B wholesale distributor and importer specializing in tools, hardware, DIY, gardening, and homeware. With a catalog of over 30 000 products, AFT serves more than 12 000 distributors. Their homeware range includes kitchen tools, bathroom accessories, ironing boards, laundry solutions, and small storage furniture. The company operates under well-known private labels, offering solutions for both professional and household use.

Website: https://www.aftgrupo.com/

Address: Avenida El Florío 75. 18015. Granada, Spain

No. of Employees in Spain: Between 10 and 50

Global Turnover: 5.7 million $

Type of Clients: Retailers, Distributors, HoReCa

Main Brands Offered & Country of Origin: Saturnia (Spain), Alpen (Austria), Maurer Hogar (Spain)

Source: AFT Group | Zoominfo

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Mundo Flor

Company Brief Description: Mundo Flor Decoración y Diseño S.L., founded in December 2017, is a Spanish B2B wholesaler renowned for its stylish home décor and artificial botanical collections. The company's curated range includes lifelike artificial flowers and plants, ceramic and glass vases, decorative rugs, folding room dividers ("biombos"), seasonal ornaments, throw cushions, tabletop and floor lamps, and small accent furniture. In addition, Mundo Flor offers a selection of kitchenware - cookware, cutlery, dinnerware, and utensils - allowing its retail clients to source both décor and culinary essentials from a single partner.

Website: https://mundoflor.es/

Address: C. Pérez Comendador nº2, 06200 Almendralejo (Badajoz), Spain

Total No. of Employees: -

Global Turnover: No public information is available

Type of Clients: Retailers

Main Brands Offered & Country of Origin: -

Source: Mundo Flor

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.1. Biggest Importers

Goya

Company Brief Description: Goya Importaciones y Distribuciones S.L. is a Spanish company with over 40 years of experience specializing in the import and distribution of promotional items and corporate gifts. However, the company also comercializes home and kitchenware. In the home accessories category, Goya offers eco-friendly, customizable products such as decorative items and plastic organizers. In the kitchenware segment, they supply personalized stainless-steel food containers, cutlery, cookware, and bamboo utensil sets that blend functionality with sustainable branding.

Website: https://www.ggoya.com/es

Address: C/Trapani 27, Edificio Goya, Zaragoza 50197, Spain

Total No. of Employees: Between 10 and 50

Global Turnover: No public information is available

Type of Clients: Retailers, HoReCa

Main Brands Offered & Country of Origin: -

Source: Goya | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

In order to better understand the distribution landscape of kitchenware and houseware products in Spain, this chapter presents a detailed overview of **15 key retailers** that play a significant role in the sector. These include a mix of large supermarket and hypermarket chains, department stores and specialized stores, each with distinct market strategies and consumer targets.

For each retailer, the analysis covers several core aspects:

- **Product Categories:** An overview of the main kitchenware and houseware items offered, such as cookware, utensils, tableware, storage, and small kitchen appliances.

- **Brand Portfolio:** The balance between national/international branded products and private label lines, highlighting the prominence and positioning of each.

- **Price Range:** A general assessment of pricing strategy, from entry-level to premium, to help identify where each retailer stands in terms of affordability and value proposition.

This chapter aims, therefore, to provide **actionable insights for industry stakeholders** seeking to enter or expand their presence in the Spanish market. By identifying the key players in retail and analyzing their strategies, this section helps stakeholders understand how the kitchenware and houseware market is **structured and accessed by end consumers**.

Through a detailed examination of each retailer's pricing strategy, and brand representation, manufacturers can better position their offerings to align with the expectations of each retail channel.

Ultimately, this chapter serves as a **practical tool** for companies looking to navigate the **competitive retail environment in Spain's kitchenware and houseware sector**, offering a clear view of where opportunities lie and how to best approach them.

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

4.2.1. Identification and Characterization of the Biggest Retailers on the Market

El Corte Inglés

Company Brief Description: Spain's largest department store chain, El Corte Inglés offers a wide range of products including housewares and kitchenware. Known for its premium positioning, it features an extensive selection of national and international brands across categories such as cookware, tableware, small appliances, home décor and organization, textiles, and bathroom accessories, often with a focus on design, quality, and service.

Website: https://www.elcorteingles.es/

Address: Calle Hermosilla 112, 28009 - Madrid, Spain

No. of Employees in Spain: More than 81 700

No. of Stores in Spain: 560

Global Turnover (2024): 16 333 million € *(≈18 651 million $*)*

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Own Brand, Bormioli Rocco (Italy), iittala (Finland), WMF (Germany), Le Creuset (França), Pyrex (USA), Tefal (France), Georg Jensen (Denmark), Brabantia (Netherlands), Vigar (Spain).

Source: El Corte Inglés | Statista | El Corte Inglés Financial Data

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.95€ (Stainless steel whisk - El Corte Inglés);
Max. 179€ (Conical steel ladle without lid - Apollo Demeyere).

Bathroom accessories
Min. 5€ (Milos bathroom accessories collection - El Corte Inglés);
Max. 119€ (Set of 2 Wish bathroom cabinet handles in cosmic shape - Cósmico).

Household Appliances (ironing boards)
Min. 19.50€ (Ironing board 110 x 30 Soup - El Corte Inglés);
Max. 540€ (Table with ironing board101x49 loStiro - Foppapedretti).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Hipercor

Company Brief Description: Hipercor is the hypermarket chain of El Corte Inglés, established in 1980. It offers a wide range of products across food, electronics, textiles, and household goods. Hipercor sells an extensive selection of houseware, kitchenware, and bathware - including cookware, small appliances, kitchen utensils, home organization products, towels, and bathroom accessories - featuring both national and international brands alongside El Corte Inglés' own private labels. Unlike El Corte Inglés department stores, which are positioned as more premium and focused on a wider variety of high-end brands and services, Hipercor targets everyday consumer needs with a more practical and value-driven approach.

Website: https://www.hipercor.es/

Address: Calle Hermosilla 112, 28009 - Madrid, Spain

No. of Employees in Spain: Between 500 and 1 000

No. of Stores in Spain: 34

Global Turnover (2024): 16 333 million € *(≈18 651 million $*)*

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: El Corte Inglés (Spain), Joseph Joseph (UK), Quttin (Spain), Monix (Spain), Tatay (Spain)

Source: Hipercor | El Corte Inglés | El Corte Inglés Financial Data

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.45€ (Food&More clay casserole - Fackelmann);
Max. 135€ (5-piece cookware set with glass lid - Monix).

Bathroom accessories
Min. 5€ (Countertop soap dispenser - El Corte Inglés);
Max. 37.95€ (Slim Tatay floor toilet paper holder with toilet brush holder - Tatay).

Household Appliances (ironing boards)
Min. 19.50€ (Ironing board 110 x 30 Soup - El Corte Inglés);
Max. 99.95€ (Ironing board Air Board Compact M Plus 120x38 cm - Leifheit).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Lidl ES

Company Brief Description: Lidl Spain, established in 1994, is part of the German Schwarz Group and operates as a leading discount supermarket chain. It focuses on providing high-quality private-label products at competitive prices, emphasizing sustainability, innovation, and local sourcing to meet customer needs across the country. In addition to groceries, Lidl offers a rotating selection of kitchenware, houseware, and bathware - including cookware sets, utensils, storage solutions, small appliances, towels, and bathroom accessories - often through weekly limited-time offers.

Website: https://www.lidl.es/

Address: Carrer Beat Oriol s/n, Polígono Industrial La Granja, 08110 Montcada i Reixac, Barcelona, Spain

No. of Employees in Spain: Over 18 500

No. of Stores in Spain: Over 700

Global Turnover (2024): 6 572 million € *(≈7 505 million $*)*

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brand, Tefal (France), Gäns Stahlwaren GmbH (Germany), Russell Hobbs (UK), Zenker (Germany)

Source: Lidl | Expansión | Empleo Lidl

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.99€ (Kitchen knife - OWIM);
Max. 94.99€ (Knife and scissors set with block - Tefal).

Bathroom accessories
Min. 2.49€ (Bath set - OWIM);
Max. 39.99€ (Bathroom stool for clothes storage - Wenko).

Household Appliances (ironing boards)
Min. 13.99€ (Ironing board 86cm tall - Casa Si);
-

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Alcampo (Group Auchan)

Company Brief Description: Alcampo is the Spanish supermarket and hypermarket brand of Auchan Retail, present in Spain since 1981. It operates under multiple formats – hypermarkets, supermarkets, proximity stores, and an online platform since 2021. Alongside food and everyday essentials, Alcampo offers a wide range of kitchenware, houseware, and bathware, including cookware, utensils, tableware, home organization products, bathroom textiles, and accessories, both from national and international brands as well as its own private labels.

Website: https://www.compraonline.alcampo.es/

Address: Lugar Santiago De Compostela Sur, La Vaguada Edificio De Oficinas, 28029 Madrid, Spain

No. of Employees in Spain: 23 300

No. of Stores in Spain: 522

Alcampo (Spain) Turnover (2024): 4 611 million € *(≈5 265 million $*)*

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brand, LAV (Turkey), Actuel by Auchan Lab (France), Tefal (France), Quid (Spain), Megafesa (Spain)

Source: Alcampo | Inforetail | Reuters | ScrapeHero

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.25€ (Chromium-plated mixer rod, 25cm - Alcampo);
Max. 21.50€ (Granite mortar, 13x8 centimeters - Ibili).

Bathroom accessories
Min. 12.99€ (Black wastebasket with bamboo lidGranite mortar, 13x8 centimeters - Actuel);
Max. 14.99€ (Roll holder with storage, black - Actuel).

Household Appliances (ironing boards)
Min. 14.99€ (Ironing board with cover, 10 positions and automatic opening - Sonecol);
Max. 36.99€ (Height adjustable ironing board up to 95cm with support for ironing center, 120x40cm - Actuel).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

E.Leclerc ES

Company Brief Description: E.Leclerc is a French hypermarket chain operating in Spain since 1992. Each store is independently managed under a cooperative model. While some data lists around 250 employees, actual numbers must be higher. E.Leclerc focuses on low prices and strong private-label lines, including in houseware, bathware, and cookware, offering items such as pots, pans, kitchen tools, bathroom textiles, storage solutions, and cleaning accessories, often complemented by selected national and international brands.

Website: https://www.e-leclerc.es/

Address: Avenida San Pablo, 26 - 3° Planta, 28823, Coslada, Madrid, Spain

No. of Employees in Spain: Over 250

No. of Stores in Spain: 13

Global Turnover (2024): 96 million € *(≈109.622 million $*)*

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brands, Bergner (Spain), Fagor (Spain)

Source: E.Leclerc | Statista

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 1.25€ (Chromium-plated mixer rod, 25cm - Alcampo);
Max. 21.50€ (Granite mortar, 13x8 centimeters - Ibili).

Bathroom accessories

Min. 12.99€ (Black wastebasket with bamboo lidGranite mortar, 13x8 centimeters - Actuel);
Max. 14.99€ (Roll holder with storage, black - Actuel).

Household Appliances (ironing boards)

Min. 14.99€ (Ironing board with cover, 10 positions and automatic opening - Sonecol);
Max. 36.99€ (Height adjustable ironing board up to 95cm with support for ironing center, 120x40cm - Actuel).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Carrefour ES

Company Brief Description: Carrefour Spain, part of the French Carrefour group, has been operating since 1973. It operates various formats including hypermarkets, supermarkets, and convenience stores (Carrefour Express), offering a broad range of products, such as houseware and kitchenware, with a focus on both national and international brands as well as private labels. Carrefour Spain is a leader in e-commerce and is committed to sustainability, recently replacing paper flyers with digital offers.

Website: https://www.carrefour.es/

Address: Calle Campezo, 16, Madrid, Comunidad de Madrid 28022, Spain

No. of Employees in Spain: Over 10 000

No. of Stores in Spain: Over 1 500

Carrefour ES Turnover (2024): 11 728 million € *(≈13 392 million $*)*

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brand, Tefal (France), Megafesa (Spain), Joseph Joseph (UK), Umbra (Canada)

Source: Carrefour | *Carrefour Financial Data* | LinkedIn | EFE:Agro

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 0.58€ (Spatula (32 X 6 Cm) - Quttin);
Max. 1276.92€ (Professional Pressure Cooker Robust 50l - Lacor).

Bathroom accessories

Min. 1.28€ (Soap Dispenser Black Gray Glass Polypropylene (6,5 X 16 X 6,5 Cm) - Berilo);
Max. 56.66€ (Set Of 4 Green Glass Bathroom Accessories Soap Dispenser Toothbrush Holder Toothbrush Holder Tumbler Glamour Canoe, Green - Beliani).

Household Appliances (ironing boards)

Min. 11.99€ (Tabletop Ironing Board 73X32 cm, Stamped - RAYEN);
Max. 748.90€ (Full Size Ironing Board 1010 X 490 Mm - Foppapedretti Lostiro).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

makro

Makro ES

Company Brief Description: Makro Spain, part of the German METRO Group, is a leading wholesale distributor established in 1972 focused primarily on serving the hospitality sector (HoReCa). It operates cash & carry stores across the country and offers a wide assortment of professional-grade products. Under the relevant categories, it specializes mainly in cookware, kitchen utensils, small appliances, and tableware, tailored to the needs of restaurants and catering businesses. It also supplies bathroom items such as hygiene dispensers, cleaning accessories, and textiles, covering essential non-food supplies for professional environments.

Website: https://www.makro.es/

Address: Paseo Imperial 40, 28005 Madrid, Spain

No. of Employees in Spain: Over 3 700

No. of Stores in Spain: 37

Makro ES Turnover (2024): 1 737 million € *(≈1 983 million $*)*

Type of Clients: Corporate

Main Brands Offered & Country of Origin: Own Brand, Lacor (Spain)

Source: Makro | Makro Tiendas | Makro 50 Aniversario | Financial Food

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 0.26€/unit (Reusable Plastic Tasting Glass “Water Green” 60ml 5x6,5cm - García de Pou);
Max. 99.99€ (3-layer copper induction frying pan 240mm - Vogue).

Bathroom accessories
Min. 4.94€ (DIAMOND DISPENSER YELLOW - Versa);
Max. 69.83€ (Stainless steel toilet brush holder with rectangular white slate base - N/A).

Household Appliances (ironing boards)
Min. 22.12€ (Minerva Ironing Board 110X32Cm - Quid);
Max. 261.02€ (Ironing board Classic Express M Compact - Leifheit).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Leroy Merlin ES

Company Brief Description: Leroy Merlin Spain, part of the French Adeo Group, is a major home improvement and DIY retailer with stores across the country. Beyond renovation materials, it offers a selection of houseware, kitchenware, cookware, and bathware accessories. This includes kitchen utensils, pots and pans, cutlery, dish racks, organizers, and storage containers, as well as bathroom accessories like soap dispensers, toothbrush holders, towel racks, and shower storage. Leroy Merlin also carries a variety of decorative items for the home, such as mirrors, lighting, textiles, and wall art.

Website: https://www.leroymerlin.es/

Address: Avenida de la Vega, 2 Alcobendas, 28108 Madrid, Spain

No. of Employees in Spain: Over 18 000

No. of Stores in Spain: 137

Turnover in Spain (2022): 3 300 million € *(≈3 768 million $*)*

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Own Brand, Megafesa (Spain), Fagor (Spain), Braun (Germany), Brabantia (Netherlands)

Source: Leroy Merlin | Statista | Leroy Merlin Empleo

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 2.60€ (Round Tinplate Gray Rice Tin (10.8 x 18 x 10.8 cm) - Kinvara);
Max. 149.99€ (24 Candy Jars, 1,5 L, Food Storage Containers, Glass & Stainless Steel, with Lid, Candy, Transparent - Relaxdays).

Bathroom accessories

Min. 19.23€ (Toilet Brush Dispenser Bathroom Set Black - Kadax);
Max. 194.54€ (Toilet brush set KEUCO EDITION 11, frosted real glass, 11164039000, Color: brushed bronze - KEUCO).

Household Appliances (ironing boards)

Min. 9.49€ (Ironing board for sleeves 52X11 cm - N/A);
Max. 849.70€ (Black folding suction and blowing ironing board on wheels, with boiler stand and Foxydry Vivo Full Steam ironing board - Foxydry Vivo).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Conforama

Company Brief Description: Conforama Iberia, part of the XXXLutz Group since 2023, traces its origins to France. A specialist in affordable home furnishings, it has been active in Spain and Portugal for over 30 years. Positioned as a discount retailer, Conforama offers a broad range of products - from sofas, mattresses, and bedroom furniture to kitchen units, appliances, decorative textiles, and bathroom accessories. Its presence spans both physical stores and a growing online platform.

Website: https://www.conforama.es/

Address: Avenida Baix Llobregat, 1-3 (Módulo B, Polígono Blau II), 08820 El Prat de Llobregat, Barcelona, Spain

No. of Employees in Spain: Over 2 500

No. of Stores in Spain: 45

Conforama Iberia (Spain + Portugal) Turnover (2024): 400 million € *(≈456.760 million $*)*

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Own Brand, Bergner (Spain), Juypal (Spain), Tefal (France)

Source: Conforama | Notifix | Conforama Jobs | News.Cision

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.90€ (GRES MUG WITH HANDLE assortment 300ml - N/A);
Max. 127.99€ (Explora Steamer, Die-cast Aluminum, Black - Design Mania).

Bathroom accessories
Min. 6.50€ (Msv Polyester/Rubber Soap Dish In Blue 11,8 X 8,8 Z 2,7 Cm - MSV);
Max. 100.40€ (Rivazza Black Foot Set With Reservoir - Wenko).

Household Appliances (ironing boards)
Min. 39.91€ (Hanging Ironing Board 135x39 - Thinia Home);
Max. 125.63€ (IB3001 Ironing Board - Braun).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Casa Viva

Company Brief Description: Casa Viva is a Spanish homeware and décor retail chain, part of Grupo PENTAGO XXI, S.L.U. Originally founded in 1955 and later rebranded, it offers a curated selection of items - including kitchenware, cookware, tableware, bathroom accessories, small furniture, and decorative products. Positioned in the mid to upper-market segment, Casa Viva stands out for its focus on quality, design, and sustainability, promoting initiatives like cookware recycling and partnerships that support inclusive employment.

Website: https://www.casaviva.es/

Address: Calle Consell de Cent 294, 08007 Barcelona, Spain

No. of Employees in Spain: Between 200 and 500

No. of Stores in Spain: 30

Turnover (2024): No public information is available

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brand, BRA (Spain), Guzzini (Italy), Taylor's Eye Witness (UK)

Source: Casa Viva | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 1.99€ (Stainless steel pizza cutter 19cm - EH);
Max. 54.99€ (Wooden Tacoma with 5 stainless steel knives - Taylor's Eye Witness).

Bathroom accessories

Min. 1.00€ (Grey plastic toothbrush glass 8x11cm - N/A);
Max. 19.99€ (White resin toilet brush holder - Sada).

Household Appliances (ironing boards)

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04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Company Brief Description: Dia Group is a Spanish discount supermarket chain founded in 1979. It is a retail company primarily focused on low-cost food products, particularly private-label items, and operates through both physical stores and online platforms. While its main focus is on groceries and personal care products, Dia also offers a selection of home-related items, such as small kitchenware and household accessories.

Website: https://www.dia.es/

Address: Parque Empresarial de las Rozas - Edif. Tripark C/ Jacinto Benavente 2 A 28232 Las Rozas, Madrid - Spain

No. of Employees in Spain: -

No. of Stores in Spain: 3 300

Dia (Spain) Turnover (2024): 4 265 million € *(≈4 870 million $*)*

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Own Brand, Design Mania (Italy), Wenko (Germany), Thinia Home, Braun (Germany)

Source: Dia Group | Dia | Dia Financial Data | Statista

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware
Min. 1.90€ (GRES MUG WITH HANDLE assortment 300ml - N/A);
Max. 127.99€ (Explora Steamer, Die-cast Aluminum, Black - Design Mania).

Bathroom accessories
Min. 6.50€ (Msv Polyester/Rubber Soap Dish In Blue 11,8 X 8,8 Z 2,7 Cm - MSV);
Max. 100.40€ (Rivazza Black Foot Set With Reservoir - Wenko).

Household Appliances (ironing boards)
Min. 39.91€ (Hanging Ironing Board 135x39 - Thinia Home);
Max. 125.63€ (IB3001 Ironing Board - Braun).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Amazon.es

Company Brief Description: Amazon.es, the Spanish branch of global e-commerce giant Amazon, offers one of the most extensive selections of houseware, kitchenware, cookware, and bathware in the country. Operating entirely online, it serves both individuals and businesses with a wide range of products. Amazon sells both well-known international brands and a variety of private labels, including Amazon Basics, which cover affordable options. With fast delivery, competitive pricing, and detailed customer reviews, Amazon.es is a key player in the Spanish market for everyday and specialized home products.

Website: https://www.amazon.es/

Address: Calle de Ramírez de Prado, 5, 28045 Madrid, Spain

No. of Employees in Spain: Over 25 000

No. of Stores in Spain: -

Amazon.es Turnover (2023): 7 100 million € *(≈8 107 million $*)*

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Own Brand, BRA (Spain), Tefal (France), Brabantia (Netherlands), Joseph Joseph (UK)

Source: Amazon.es | Amazon.es Empleados | Statista

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 1.10€ (Bowl with lid (terracotta 6 pieces, diameter 120 mm) - Table Top);
Max. 22958.29€ (Stainless steel kitchen utensil set - Qinhaixi);

Bathroom accessories

Min. 0.04€ (Reusable adult cup, plastic toothbrush cup for the bathroom - Generisch);
Max. 49.99€ (Office make-up organizer, plastic jewelry storage drawers, anti-dust cosmetics storage box - Galatée).

Household Appliances (ironing boards)

Min. 4.10€ (High-temperature resistant, durable, thick, space-saving, mini ironing board for sleeve cuffs (dark blue pictures) - Denash);
Max. 2868.63€ (Folding ironing board Adjustable for the bedroom, space-saving, sturdy metal frame, 7 adjustable heights 64-90 cm - JOuaN).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Fnac.es

Company Brief Description: Fnac Spain is the Spanish arm of the French FNAC-Darty group, operating online and through 28 stores nationwide. Initially specializing in books, music, electronics, and cultural goods, it expanded in 2017 with the Fnac Home section. While its physical stores do not carry home and kitchen items, Fnac Home online offers a curated range of kitchenware (utensils, small appliances) and bathware (accessories, organization tools). Through its Marketplace, Fnac.es hosts over 6 million items from nearly 300 national sellers. This structure positions Fnac Spain as a strong e-commerce player in home-related categories, distributing via its online platform rather than in-store presence.

Website: https://www.fnac.es/

Address: 9 rue des Bateaux-Lavoirs, 94200 Ivry-sur-Seine, France

No. of Employees in Spain: Approximately 2 000

No. of Stores in Spain: 34

Fnac.es Turnover (2023): 49.7 million $

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Tefal (France), Rowenta (Germany), Taurus (Spain)

Source: Fnac.es | Orbis

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 1.81€ (Ice cream spoon Arcos Berlin 560500 monoblock one-piece stainless steel 18/10, esPESO r 3 mm and blade 13.5 cm in box - Arcos);
Max. 789.14€ (Casserole - Buyer);

Bathroom accessories

Min. 5.75€ (Hydrophilic Sponge - Suavinex);
Max. 21.21€ (Bathroom bucket 7 liters Olympia Tatay 21x21,5x29 cm - Tatay).

Household Appliances (ironing boards)

Min. 17.42€ (Jata Mod Tm200 Folding Ironing Board with Sleeves - Jata);
Max. 371.40€ (Ironing board der Lelit PA71N - Lelit).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Viva Online

Company Brief Description: Loja Viva is a Portuguese home goods retail chain with over 20 years of experience serving customers across Portugal through more than 30 physical stores and an online shop launched in 2012. They offer a wide range of affordable, functional, and colorful products including furniture, décor, textiles, kitchenware, tableware, and bathroom accessories, designed for real homes and everyday life. While Loja Viva currently does not have physical stores in Spain, they do sell to Spanish customers through their online store. Their strong online presence, diverse collections, and competitive pricing make them a promising model for further expansion into the Spanish market.

Website: https://lojavivaonline.com/en

Address: Rua José Fonseca Carvalho, Prior Velho, Lisboa, Portugal

Total No. of Employees: Between 50 and 200

No. of Stores in Spain: -

Turnover (2024): No public information is available

Type of Clients: Mainly Individual

Main Brands Offered & Country of Origin: Mainly Own Brand

Source: Viva Online | LinkedIn

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 1.81€ (Ice cream spoon Arcos Berlin 560500 monoblock one-piece stainless steel 18/10, esPESO r 3 mm and blade 13.5 cm in box - Arcos);
Max. 789.14€ (Casserole - Buyer);

Bathroom accessories

Min. 5.75€ (Hydrophilic Sponge - Suavinex);
Max. 21.21€ (Bathroom bucket 7 liters Olympia Tatay 21x21,5x29 cm - Tatay).

Household Appliances (ironing boards)

Min. 17.42€ (Jata Mod Tm200 Folding Ironing Board with Sleeves - Jata);
Max. 371.40€ (Ironing board der Lelit PA71N - Lelit).

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

sklum

Sklum

Company Brief Description: Sklum Spain is a rapidly expanding, design-focused online décor and furniture retailer founded in 2017, in Spain. It offers trendy and sustainable home goods for both individuals and professionals, with notable e-commerce growth and distinctive product lines. Despite its appeal and scale, some sources state that the company is facing some challenges in post-sales support and delivery performance, as reflected in customer feedback.

Website: https://www.sklum.com/es/

Address: 46720 Vilallonga/Villalonga, Valencia, Spain

No. of Employees in Spain: Over 700

No. of Stores in Spain: -

Turnover (2024): 228.2 million $

Type of Clients: Individual and Corporate

Main Brands Offered & Country of Origin: Mainly Own Brand

Source: Sklum | *ECDB* | Sklum Who We Are

04. IDENTIFICATION OF MAJOR IMPORTERS & KEY RETAILERS

4.2.Key Retailers

Price Range according to each Poduct Category:

Kitchenware

Min. 6.95€ (Jar for tea - Treska);

Max. 159.95€ (Cookware 2 pots UMA + 3 frying pans PAN STUDIO - Create);

Bathroom accessories

Min. 3.95€ (Odysseus brush holder - Ulysse);

Max. 48.95€ (Stainless steel toilet brush - Albox).

Household Appliances (ironing boards)

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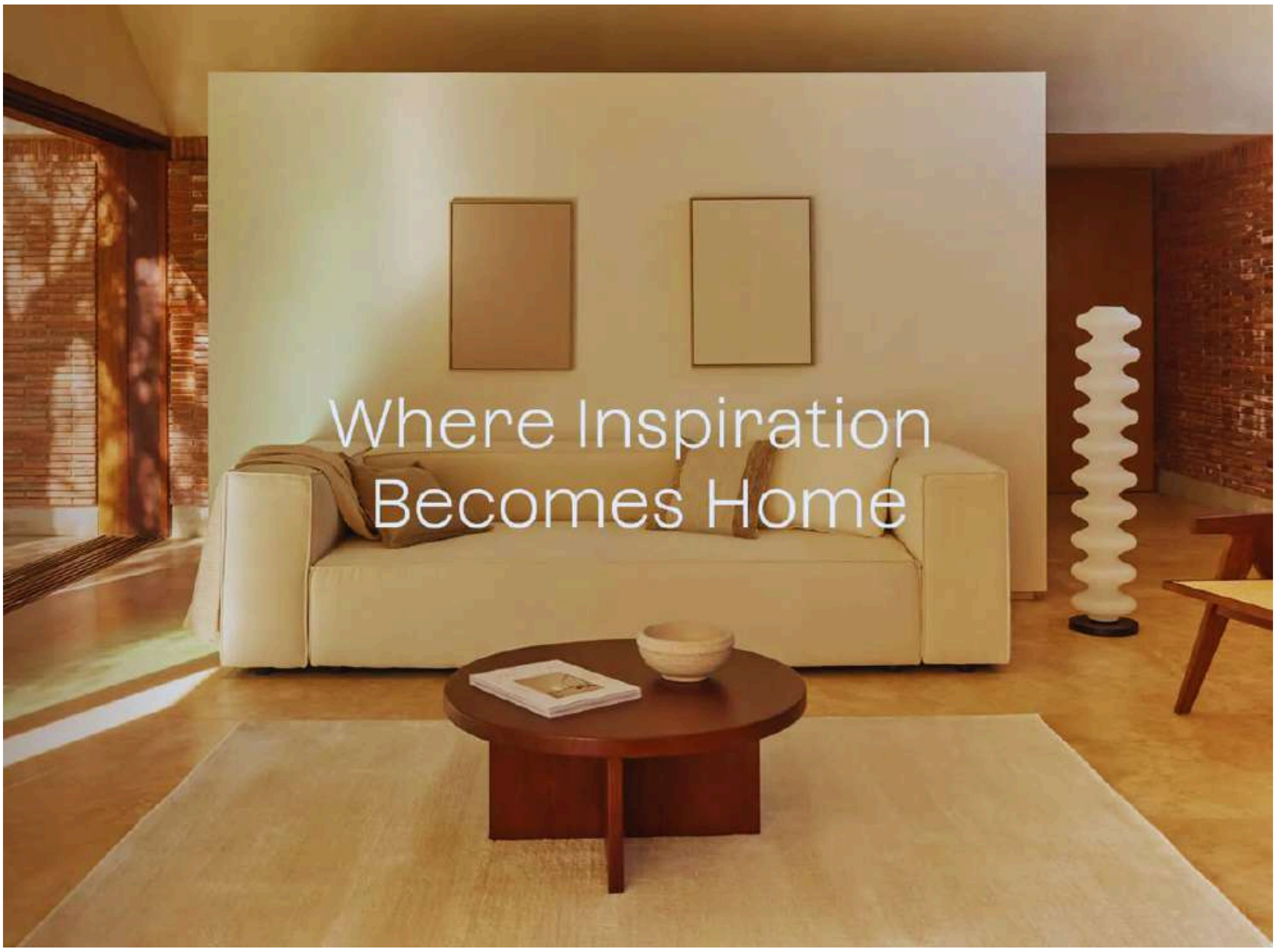

05. COMPETITIVE LANDSCAPE

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

This section provides a **structured and analytical overview** of the main companies shaping the homeware and kitchenware market in Spain.

The aim is not only to identify key players (including the ones identified during the store check), but also to understand the strategies that underpin their market presence. Through a comparative lens, the chapter explores how different types of firms - ranging from **internationally positioned brands to mass-market producers and locally rooted manufacturers** - compete, adapt, and evolve within the Spanish context.

The analysis is built around several core dimensions. These include brand positioning, product category specialization, pricing strategy, distribution models, and the integration of sustainability principles into business operations.

Rather than treating these as isolated variables, the chapter views them as **interconnected components** of broader strategic models that reflect both global trends and domestic market conditions.

Particular attention is given to how brands navigate an increasingly complex environment shaped by shifting consumer expectations, regulatory developments, and the growing importance of omnichannel retailing. The inclusion of companies with varied geographic origins and operational scales allows for a nuanced understanding of the **sector's competitive heterogeneity** and highlights the coexistence of different value propositions and growth strategies.

By characterizing these companies in depth, this section contributes to a clearer understanding of the dynamics driving **brand differentiation, consumer engagement, and market structure.** It provides essential context for assessing the current balance of power in the sector, while also laying the groundwork for anticipating how competitive configurations might evolve in response to innovation, sustainability imperatives, and changes in demand.

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

JOSEPH JOSEPH | Home Decor & Organization, Kitchenware, Cookware, Ironing Boards, Bathroom Accessories

Brand Brief Description: Joseph Joseph is a British brand founded in 2003, renowned for developing household products that combine functional, innovative, and aesthetically appealing designs. The brand entered the Spanish market around the mid-2010s and is currently available in major department stores such as El Corte Inglés, home decor shops, and online platforms like Amazon. Specializing primarily in kitchen and bathroom accessories, in recent years, Joseph Joseph has demonstrated an increasing commitment to sustainability by incorporating recycled and recyclable materials.

Website: https://eu.josephjoseph.com/

Address: 100 Union Street, London, England SE1, GB

Global Turnover (2023): 43.746 million £ *(≈59.229 million $*)*

Pricing Strategy: Mid-to-Premium
- Home Decor & Organization: 10.99€-139.99€
- Kitchenware: 6.99€-460.00€
- Cookware: 17.99€-749.99€
- Ironing Boards: 39.99€-189.99€
- Bathroom Accessories: 9.99€-89.99€

Distribution Channels: Carrefour, El Corte Inglés, Hipercor (Physical/Online), Amazon.es, Own EU Website (Online)

Certifications/ Standards: Ecocert's GOTS, RWS, GRS

Source: GOV.UK | Joseph Joseph

*Conversion carried out on June 2, 2025, at an exchange rate of 1 GBP = 1,35 USD

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

BRABANTIA | Home Organization, Ironing Boards, Bathroom Accessories

Brand Brief Description: Brabantia is a Dutch company, founded in 1919, widely recognized for its high-quality homeware that combines sleek, modern design with a strong commitment to sustainability. It entered the Spanish market in 1973 selling a wide range of household products, including waste bins, laundry care items such as ironing boards and drying racks, kitchen tools like storage containers and utensils, bathroom accessories including soap dispensers and toilet brushes, and general home organization products. Among these, Brabantia is especially known for its waste management systems and laundry solutions, which have become flagship categories due to their smart, space-saving designs and durable materials.

Website: https://www.brabantia.com/es/

Address: Leenderweg 182, 5555 CJ Valkenswaard, Netherlands

Global Turnover (2022): 162 million € *(≈184.988 million $*)*

Pricing Strategy: Mid-to-Premium

Home Organization: 19.95€-335.00€
Kitchenware: 5.95€-189.00€
Ironing Boards: 43.50€-275€
Bathroom Accessories: 8.95€-99.00€

Distribution Channels: Leroy Merlin, El Corte Inglés (Physical/Online), Carrefour (Marketplace), Amazon.es, Own Store (Online)

Certifications/ Standards: Cradle to Cradle, B Corp, ISO 14001

Source: Brabantia | Brabantia Results

*Conversion carried out on June 2, 2025, at an exchange rate of 1 EUR = 1,14 USD

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5.1. Identification and Characterization of the Main Brands in the Market

BELIANI | Home Decor & Organization, Kitchenware, Cookware, Bathroom Accessories

Brand Brief Description: Beliani is a Swiss-based company founded in 2009 that specializes in stylish, yet affordable furniture and home décor. It operates across much of Europe, including Spain, and sells a broad product range. In the kitchen category, the brand provides stylish furniture such as dining tables, chairs, and bar stools, cookware and utensils. For home décor and organization, Beliani features a wide range of decorative items like mirrors, rugs, lighting, cushions, and storage furniture, aimed at enhancing interior aesthetics. In the bathroom segment, it offers vanity units, mirrors, and storage solutions, emphasizing modern style over practical accessories.

Website: https://www.beliani.es/es/

Address: Haldenstrasse 5, Baar, Zug 6340, Switzerland

Global Turnover (2022): 5.5 million $

Pricing Strategy: Mid-to-Premium

Home Decor & Organization: 29.99€-419.00€
Kitchenware: 49.99€-189.99
Cookware: 119.99€-219.99
Bathroom Accessories: 29.99€-109.99€

Distribution Channels: Carrefour (Physical/Online/Marketplace), Conforama (Physical/Online), Amazon.es, Own Store (Online)

Certifications/ Standards: -

Source: Beliani | Orbis

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

SARGADELOS | Home Decor, Tableware

Brand Brief Description: Sargadelos is a historic Galician porcelain brand founded in 1806 and revived in the 1960s with a mission to blend traditional craftsmanship and avant-garde design. Known for its distinctive cobalt-blue and white ceramics inspired by Celtic and Galician motifs, the company produces tableware and home decorative objects. The tableware it offers includes complete dining sets, plates, bowls, cups, teapots, and serving dishes- often sold as collectible or artistically designed series that combine functionality with cultural symbolism. In regard to home decorative items, these include vases, figurines, wall plates, candle holders, and limited-edition ceramic sculptures.

Website: https://sargadelos.com/es/

Address: Barrio Sargadelos (CR. Sargadelos) 27981, Cervo, Lugo, Spain

Global Turnover (2023): 9.3 million $

Pricing Strategy: Premium
Home Decor: 11.00€-479.00€
Tableware: 12.00€-1146.00€

Distribution Channels: El Corte Inglés (Physical/Online), Amazon.es (Online), Own store (Physical/Online)

Certifications/ Standards: -

Source: Sargadelos | Galería *Sargadelos Vigo* | *Dun&Bradstreet* | *Orbis*

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

ARCOS Albacete (Spain) Since 1734

ARCOS | Cutlery, Cookware

Brand Brief Description: Arcos is a renowned Spanish cutlery brand founded in 1734 in Albacete, making it one of the oldest knife manufacturers in the world. What began as a small artisan workshop evolved into an industrial operation in 1875, eventually growing into a global brand present in over 90 countries. While Arcos is best known for its professional kitchen knives, steak knives, and cutlery sets, its product range also includes a variety of cookware, such as kitchen utensils and pots and pans. The company blends centuries of tradition with modern innovation, positioning itself as a premium manufacturer that unites heritage, advanced technology, and practical design for both professional and home chefs.

Website: https://www.arcos.com/es_ES/

Address: Avda. Gregorio Arcos 38, 02007 Albacete, Albacete, Spain

Global Turnover (2023): 38.2 million $

Pricing Strategy: Mid-to-Premium
Cutlery: 1.17€-644.65€
Cookware: 35.19€-156.34€

Distribution Channels: Alcampo (Physical/Online), Viva Online, Fnac.es, Casa y Menaje 2015 (Online), Own Store (Online)

Certifications/ Standards: ISO 9001, NSF, HACCP, FSC

Source: Arcos | Orbis

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

SAN IGNACIO | Kitchenware, Cookware

Brand Brief Description: San Ignacio is a Spanish cookware brand founded in 1944 in the Basque Country and now part of the Bergner Group. Originally known for its enameled cookware, it has evolved into a modern kitchenware company focused on promoting Mediterranean cooking. Its main products include frying pans, pots, pressure cookers, and utensils, with an emphasis on non-stick coatings and induction-compatible materials. San Ignacio combines functional design with durability and affordability, positioning itself in the upper mid-range market, offering quality cookware for everyday and home chefs.

Website: https://bebergner.com/san-ignacio/

Address: Edificio CINK Castellana, Paseo de la Castellana 194, Despacho 2,
28046 Madrid, Spain

Global Turnover (2023): 14.4 million $

Pricing Strategy: Mid-to-Premium
Kitchenware: 0.99€-33.10€
Cookware: 21.99€-676.99€

Distribution Channels: Carrefour (Physical/Marketplace/Online), Makro.es (Physical/Online), Amazon.es (Online)

Certifications/ Standards: ISO 9001, SA8000, FSC, GRS

Source: Bergner Group | Orbis | Carrefour

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

DOMPLEX | Home Organization, Kitchenware, Bathroom Accessories

Brand Brief Description: Domplex is a Portuguese company founded in 1959 that manufactures and sells plastic products for both industrial and domestic use. Their range includes containers, storage solutions, kitchen utensils, cleaning products, bathroom and outdoor accessories. They mainly use polymer injection molding in production and serve markets in Portugal and Spain. The company is recognized for quality and innovation.

Website: https://domplexstore.com/

Address: R. das Flores 136 140, 2400-016 Leiria, Portugal

Global Turnover (2023): 24.6 million $

Pricing Strategy: Mid
Home Organization: 1.83€-35.71€
Kitchenware: 0.48€-20.45€
Bathroom Accessories: 0.60€-25.75€

Distribution Channels: Own Store (Online)

Certifications/ Standards: ISO 9001, ISO 22000/HACCP

Source: Domplex | Orbis

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

LUIGI BORMIOLI | Drinkware

Brand Brief Description: Luigi Bormioli is an Italian glassware brand founded in 1825, known for high-quality, lead-free crystal glass products made from their proprietary SON.hyx material. The brand produces a wide range of glassware like wine glasses, tumblers, and decanters, designed to enhance the drinking experience. Luigi Bormioli combines traditional craftsmanship with modern innovation, emphasizing durability, sustainability, and elegant design. It's recognized internationally and has won design awards such as the German Design Award Gold 2025.

Website: https://www.bormioliluigi.com/glassware/en/collections/luigi-bormioli/

Address: Viale Europa, 72/A, 43122 Parma (PR), Italy

Global Turnover (2023): 784.8 million $

Pricing Strategy: Mid-to-Premium
Drinkware: 9.95€-65.95€

Distribution Channels: El Corte Inglés (Physical/Online), Amazon.es, PTM, Soler Hispania (Online)

Certifications/ Standards: ISO 9001, ISO 14001, ISO 45001, ISO 50001, ISO 14064, GHG Protocol

Source: Bormioli Luigi | Orbis | El Corte Inglés

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

WEDGWOOD

WEDGWOOD | Tableware

Brand Brief Description: Wedgwood is a prestigious British luxury brand founded in 1759, famous for its fine china, porcelain, and especially its iconic Jasperware with the distinctive Wedgwood Blue color. Known for exceptional craftsmanship and design, Wedgwood has served British royalty and notable figures worldwide. Now part of the Finnish Fiskars Group, the brand offers, in Spain a wide range of products of tableware. Wedgwood continues to blend heritage and modern design in its luxury home and lifestyle products.

Website: https://www.wedgwood.com/

Address: Wedgwood Drive, Barlaston, Stoke-on-Trent, Staffordshire, ST12 9ER, UK

Fiskars' Group Turnover (2024): 1.16 million € *(≈1.32 million $*)*

Pricing Strategy: Premium
Tableware: 22.95€-344.00€

Distribution Channels: El Corte Inglés (Physical/Online), Amazon.es (Online)

Certifications/ Standards: ISO 9002

Source: Wedgwood | Fiskars Group | El Corte Inglés

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

CURVER | Home Organization, Kitchenware, Bathroom Accessories

Brand Brief Description: Curver is a Dutch brand founded in 1948, specializing in plastic household products like storage solutions, kitchenware, laundry baskets, and food containers. Now part of the global Keter Group, Curver focuses on combining stylish design with everyday functionality. The brand is also committed to sustainability, increasingly using recycled materials in its products, and maintains a strong presence across Europe and beyond.

Website: https://curver.com/es/

Address: Beaumont Road, Banbury, Oxon OX16 1RH, UK

Global Turnover (2023): 143.9 million $

Pricing Strategy: Mid
- Home Organization: 4.99€-144.46€
- Kitchenware: 4.25€-42.32€
- Bathroom Accessories: 5.90€-68.27€

Distribution Channels: El Corte Inglés, Carrefour, Conforama, Leroy Merlin (Physical/Online), ADI Iberia, Amazon.es (Online)

Certifications/ Standards: FSC

Source: Curver | Orbis | Carrefour

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

TATAY

TATAY | Home Organization, Kitchenware, Bathroom Accessories

Brand Brief Description: Tatay is a Spanish family-owned company founded in 1930, specializing in plastic household products. Known for quality and durable design, Tatay offers kitchen accessories, cleaning tools, storage solutions, bathroom fixtures, and garden irrigation systems. The brand is committed to sustainability, using recycled materials and following a "Zero Waste" policy. With operations in multiple countries, Tatay remains a key player in the Spanish market.

Website: https://www.tatay.com/es

Address: C/Besòs, 2 - 08170 Montornès del Vallès, Barcelona, Spain

Global Turnover: 19.9 million $

Pricing Strategy: Mid
- Home Organization: 2.99€-58.33€
- Kitchenware: 2.51€-66.25€
- Bathroom Accessories: 2.99€-54.38€

Distribution Channels: El Corte Inglés (Physical/Online), Carrefour (Physical/Marketplace/Online), Amazon.es, Viva Online, Fnac.es, Leroy Merlin (Online)

Certifications/ Standards: ISO 9001, ISO 14001, Ecoembes

Source: Tatay | Rocket Reach | Carrefour

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

METALTEX | Home Organization, Kitchenware, Cookware, Ironing Boards, Bathroom Accessories

Brand Brief Description: Metaltex is a family-owned company founded in 1945, specializing in metal and wire household products. Originally Swiss based, it offers over 2,000 items across kitchen utensils, organizing and cleaning tools, and laundry care. The brand focuses on quality, innovation, and sustainability, with unique coatings that enhance durability and design. Metaltex has a strong European presence, including in Spain, and over 80 years of experience in making practical, stylish home essentials.

Website: https://www.metaltex.es

Address: Via Pra Vicc 2, 6852 Genestrerio (TI), Switzerland

Metaltex's Iberia Turnover (2023): 6.5 million $

Pricing Strategy: Mid

Home Organization: 3.46€-114.14€
Kitchenware: 2.10€-100.00€
Cookware: 32.09€-94.86€
Ironing Boards: 69.00€
Bathroom Accessories: 14.42€-49.80€

Distribution Channels: Carrefour (Physical/Marketplace/Online), Makro.es, Amazon.es (Online)

Certifications/ Standards: ISO 9001:2015, SA 8000:2014, FSC

Source: Metaltex | Orbis | Carrefour

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

COSMIC

COSMIC | Home Organization, Kitchenware, Bathroom Accessories

Brand Brief Description: Cosmic is a Spanish brand founded in 1985 that specializes in bathroom accessories and furniture. Known for combining modern design with functionality, Cosmic serves both residential and commercial markets worldwide, including hotels. Their product range includes towel racks, mirrors, shelves, dispensers, and other bathroom accessories, often customizable through their "Cosmic Custom" program. The company is committed to sustainability, using recycled materials and eco-friendly processes.

Website: https://www.cosmicbrand.com/

Address: Industrial Cosmic Sau C/Esquis S/N Local Núm.1, 08415 Bigues I Riells, Barcelona, Spain

Global Turnover: 6.1 million $

Pricing Strategy: Mid-to-Premium
Home Organization: 15.90€-499.90€
Kitchenware: 5.90€-206.90€
Bathroom Accessories: 5.90€-546.90€

Distribution Channels: El Corte Inglés, Leroy Merlin (Physical/Online), Amazon.es, Own Store (Online)

Certifications/ Standards: FSC

Source: Cosmic | Zoominfo

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

VILEDA | Ironing Boards

Brand Brief Description: Vileda is a German brand with over 70 years of experience in household cleaning products, including mops, buckets, sponges, and notably, . Their ironing boards are designed for durability and ease of use, featuring adjustable heights and heat-resistant covers. Vileda entered the Spanish market in 1974. Today, the brand continues to offer high-quality cleaning solutions, with ironing boards being a significant part of their product lineup.

Website: https://www.vileda.es/

Address: Im Technologiepark 19, 69469 Weinheim, Germany

Global Turnover (2022): 1 371 million $

Pricing Strategy: Mid
Ironing Boards: 54.99€-85.99€

Distribution Channels: El Corte Inglés, Hipercor, Alcampo (Physical/Online), Carrefour (Physical/Marketplace/Online), AFT Group, ADI Iberia, Amazon.es (Online)

Certifications/ Standards: ISO 9001, ISO 14001, ISO 45001, ISO 50001

Source: Vileda | Orbis | Carrefour

05. COMPETITIVE LANDSCAPE

5.1. Identification and Characterization of the Main Brands in the Market

ROCA | Bathroom Accessories

Brand Brief Description: Roca is a leading Spanish company founded in 1917, specializing in bathroom and sanitary solutions. Its product range includes high-quality bathroom accessories such as towel holders, soap dispensers, shelves, robe hooks, and mirrors, in addition to toilets, basins, faucets, bathtubs, and smart products. With presence in over 170 countries and 81 production centers, Roca combines innovation, design, and sustainability.

Website: https://www.roca.es/

Address: Av. Diagonal, 513, 08029 Barcelona, Spain

Global Turnover (2023): 2 288 million $

Pricing Strategy: Mid-to-Premium
Bathroom Accessories: 9.45€-218.79€

Distribution Channels: Leroy Merlin, El Corte Inglés (Physical/Online), Own Store (Online)

Certifications/ Standards: ISO 9001, ISO 14001, FSC

Source: Roca | Orbis

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

As international trade becomes increasingly dynamic and competitive, a **well-informed strategic approach** is vital for market entry and long-term success.

The Spanish homeware and kitchenware sector presents both **opportunities and challenges** for foreign players, particularly Turkish exporters aiming to expand their footprint in Europe. To support these strategic ambitions, this chapter offers a **detailed SWOT analysis,** a framework that systematically identifies the **internal and external factors** influencing performance and potential in the Spanish market.

Building on the findings of previous chapters, the SWOT analysis evaluates key dimensions that shape the operating environment for exporters and market entrants. **Strengths** and **Weaknesses** reflect **internal aspects**, such as production capabilities, brand positioning, pricing competitiveness, and adaptability to consumer preferences. In contrast, **Opportunities** and **Threats** focus on **external conditions**, including evolving consumer behavior, trade regulations, shifting material trends, economic conditions, and the competitive landscape.

Spain's increasing demand for **functional, sustainable, and design-oriented home and kitchen products**, combined with a growing reliance on imports in several categories, opens doors for international suppliers. However, market access remains constrained by factors such as **dominant incumbents, shifting EU regulations, and rising consumer expectations** related to innovation and sustainability.

This SWOT analysis aims, therefore, to provide Turkish exporters and other stakeholders with **actionable insights** by mapping the current market environment against their competitive advantages and vulnerabilities. It also serves as a **practical tool for anticipating risks**, **prioritizing investment**, and **tailoring go-to-market strategies** that align with both domestic capabilities and the nuances of the Spanish consumer market.

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

The **internal environment** of Turkish homeware and kitchenware exporters is defined by their production capabilities, organizational strengths, resource allocation, and adaptability. These factors play a crucial role in determining how effectively exporters can respond to **market demands**, **differentiate from competitors**, and **sustain long-term growth** in international markets like Spain.

INTERNAL FACTORS

S STRENGTHS

- **High Quality & Compliance:** Turkish products meet global standards, offering a combination of competitive pricing and reliable delivery. This is especially attractive to Spanish buyers seeking value-for-money without sacrificing quality.
- **Agile & Customizable Supply:** Flexible production systems allow for short lead times, mix-container shipments, and tailored product designs—ideal for Spain's diverse and seasonal retail needs.
- **Ongoing International Outreach:** Turkish exporters are highly engaged in global trade fairs and digital platforms, enabling year-round contact with international buyers.
- **Export-Oriented Culture:** Decades of experience in foreign trade have cultivated robust capabilities in logistics, negotiation, and regulatory compliance.
- **Skilled Manufacturing Base:** Turkey has a well-established industrial workforce specialized in homeware, particularly in ceramics, glass, textiles, and metal goods.
- **Sustainability Progress:** There is growing adoption of eco-friendly materials and greener production methods, increasingly aligned with EU environmental expectations.

W WEAKNESSES

- **Adapting to Local Market Specifics:** Certain Turkish products may not fully meet Spain's design preferences or regulatory nuances, leading to misalignment with consumer tastes.
- **Balancing Scale and Customization:** Smaller Turkish manufacturers often struggle to scale up production while maintaining the flexibility needed to meet varied buyer demands.
- **Design Alignment:** While functional, some products may lack the Mediterranean-inspired aesthetics preferred by Spanish consumers, affecting market appeal.
- **Limited Market-Specific R&D:** Investment in Spanish-specific trends, certifications, and innovation remains relatively low, reducing competitiveness.
- **Distribution & Brand Visibility Challenges:** Without local partners or marketing support, Turkish brands may struggle to access top retailers and establish consumer recognition in a market dominated by established European players.

POSITIVE FACTORS | NEGATIVE FACTORS

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

Turkish houseware exporters possess **several internal strengths** that provide a solid foundation for competing in demanding markets like Spain.

The manufacturing base in Turkey is **highly skilled** and specialized in **home and kitchen goods**, supported by agile **production capabilities.** Flexible design options, the ability to ship mixed containers, and short lead times enable Turkish exporters to respond quickly to diverse buyer needs. This agility is further supported by exporters' proactive engagement in international marketing, including participation in trade fairs, digital platforms, and direct outreach, which helps **maintain global visibility** and **build sustained buyer relationships.**

Despite these strengths, internal challenges remain. Some products and standards may **not yet fully align with the specific preferences** or **regulatory nuances** of markets like Spain. Design alignment, in particular, is a notable challenge; without tailoring product aesthetics and features to local tastes, such as the Spanish preference for minimalist and Mediterranean styles, market appeal may be **limited**. Smaller Turkish firms may also struggle to **balance customization** with the ability to **scale operations efficiently** to meet diverse buyer demands.

In conclusion, while Turkish exporters hold significant **internal advantages** in quality, agility, and institutional backing, fully capitalizing on these strengths requires overcoming key internal challenges.

Success in Spain's competitive houseware market depends on deepening design localization, scaling customized production without sacrificing flexibility, and investing strategically in **market-specific innovation**.

Addressing these internal factors thoughtfully will enable Turkish companies to **convert their operational strengths** into **sustainable competitive advantages** and stronger market positioning.

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

The external landscape of Spain's homeware and kitchenware sector is defined by shifting macroeconomic conditions, evolving trade flows, and tightening regulations. For exporters, understanding these dynamics is essential to meet **market demands**, seize **emerging opportunities**, and **mitigate potential risks**.

EXTERNAL FACTORS

O OPPORTUNITIES

- **Accessible Market:** Spain's EU membership and geographic proximity reduce export barriers and logistics costs, providing a competitive edge over more distant suppliers.
- **Green Demand:** Increasing consumer interest in eco-friendly materials like bamboo, glass, and recycled plastics opens doors for sustainability-aligned exporters.
- **Tariff-Free Trade:** The EU–Turkey Customs Union simplifies cross-border operations with duty-free, faster shipments—an advantage compared to non-EU competitors.
- **Online Growth:** E-commerce is booming, enabling Turkish companies to bypass traditional retail bottlenecks and reach Spanish consumers directly.
- **Import Reliance:** Spain's persistent trade deficit in household goods signals strong and unmet demand for foreign products.
- **Mid-Range Segment Demand:** Turkish offerings align well with Spain's price-conscious but quality-driven middle market, particularly amid inflationary pressures.
- **Retail Diversification:** The growing fatigue with dominant private-label brands encourages Spanish retailers to explore fresh alternatives from newer foreign entrants.

T THREATS

- **Intense Asian Competition:** Low-cost Asian producers, especially from China, dominate key product categories and exert downward pressure on prices.
- **Stricter Regulations:** Compliance with the EU Green Deal and Spain's evolving packaging and safety laws raises entry costs and complexity for exporters.
- **Retailer Power and Private Labels:** Spanish retailers increasingly promote their own brands, limiting shelf space and negotiation leverage for lesser-known exporters.
- **Slow Traditional Retail Growth:** Physical retail expansion is sluggish in Spain, posing challenges for companies reliant on in-store visibility.
- **Economic Instability:** Inflation, cautious consumer spending, and market uncertainty may reduce discretionary purchases of homeware products.
- **Cultural Design Preferences:** Spanish consumers favor minimalist and Mediterranean styles, which may require product adaptation to match local aesthetic expectations.

POSITIVE FACTORS | **NEGATIVE FACTORS**

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

As presented previously, Spain represents a **strategically important** yet **complex market** for Turkish houseware exporters.

Spanish consumers are increasingly driven by **sustainability**, seeking eco-friendly products and ethical production, trends that align well with Turkey's growing capabilities in green materials. However, this opportunity comes with a **rising compliance burden**, as the EU Green Deal and national regulations push exporters to meet **stricter packaging and safety standards**. Turkish companies must therefore treat regulatory compliance not merely as an obstacle, but as a core part of their product development and marketing strategy to gain competitive differentiation.

In terms of market positioning, the middle segment of quality-conscious but price-sensitive consumers offers fertile ground. Turkish exporters sit in a **competitive sweet spot** between expensive European producers and low-cost Asian players, but the intense dominance of Asian suppliers, especially from **China**, in plastics and appliances means competing on price alone is unlikely to succeed. Instead, Turkish companies need to **emphasize product design** that resonates with Spanish cultural preferences, such as **minimalist and Mediterranean aesthetics**, and invest in building brand recognition.

Overall, the external environment for Turkish exporters in Spain is shaped by a balance of accessible market entry conditions and significant competitive and regulatory pressures. While proximity and trade agreements ease **logistical and cost barriers**, the evolving consumer expectations, stricter regulations, and retail market shifts require exporters to be **agile, innovative, and strategically focused**.

Understanding and adapting to these external factors will be essential for Turkish companies to not only enter but thrive in the Spanish houseware market, **turning challenges into opportunities** for sustainable growth and brand differentiation.

05. COMPETITIVE LANDSCAPE

5.2. SWOT Analysis

In conslusion, the **SWOT analysis** shows that Turkish houseware exporters are well-equipped to enter the Spanish market, with **strengths in quality manufacturing, flexibility**, and **growing sustainability practices.** Spain offers clear opportunities through accessible trade, rising demand for eco-friendly mid-range products, and expanding e-commerce channels.

However, strong competition from Asian suppliers, strict EU regulations, and dominant private-label brands pose real challenges. Internally, gaps in design adaptation, market-specific R&D, and scalability could limit impact if not addressed.

Success in Spain will depend on **turning production strengths** into **tailored market advantages,** through localized design, regulatory alignment, and focused innovation, to build a sustainable and competitive presence.

06.
REGULATORY ENVIRONMENT

06. REGULATORY ENVIRONMENT

6.1. Import Regulations

Before exporting kitchenware and houseware products from Turkey to Spain, it is essential to understand the **trade framework** between the two countries.

Since Spain is a member of the European Union, trade is governed by the **EU–Turkey Customs Union**, in effect since 1995. This agreement allows Turkish-origin industrial goods – including **kitchenware and houseware** – to circulate within the EU **without customs duties or quotas**, provided they meet rules of origin and customs procedures. Turkey also aligns its tariffs with the **EU's Common External Tariff** and recognizes many technical standards, easing market access.

In addition, Turkey and Spain have cooperation agreements in areas like economic development, tourism, and industrial collaboration. One key agreement is the 2003 **Double Taxation Avoidance Treaty**, which ensures companies are not taxed twice on the same income. This encourages cross-border investments and partnerships, making it financially attractive for Spanish importers and Turkish exporters.

39 relevant HS Codes covering kitchenware and houseware

including cookware, plastic items, cutlery, organizers, ironing boards, and bathroom accessories

- under the **EU–Turkey Customs Union** (valid since 1995)
- **0%** customs duties on industrial goods in line with **Decision No. 1/95 of the EC–Turkey Association Council**

All goods entering the EU must clear customs using the **Single Administrative Document (SAD)**, which includes HS/TARIC codes, origin, invoice values, transport info, and Incoterms. Importers must have an EORI number and provide documents such as certificates of origin, transport documents, and inspection certificates.

Source: Council of the European Union | European Union | Access2Markets

06. REGULATORY ENVIRONMENT

6.1. Import Regulations

Products intended for food contact – like **cookware, plastic kitchenware, and cutlery** – must comply with:

Regulation (EU) No. **10/2011**, updated by EU 2025/351 (plastic migration limits)

EC1935/2004

Regulation (EC) No. **1935/2004** (food safety),

EC2023/2006

Regulation (EC) No. **2023/2006** (GMP - good manufacturing practice

Compliance with these regulations requires the inclusion of a **Declaration of Conformity**, technical documentation, instructions for use, and migration test results. Products covered by EU safety directives (e.g., electrical items) require **CE marking**. In addition, **REACH regulations** apply to any chemicals used in production (coatings, adhesives, etc.).

Labeling must be in Spanish and include:

- Name and EU-based address of the manufacturer/importer /authorized representative.
- Technical specs and safety info.
- Use of metric units.

When it comes to packaging, it must comply with **EU and Spanish waste regulations**, including **Spain's Act 7/2022**, which sets Extended Producer Responsibility (EPR) rules, especially for plastic packaging.

Source: Council of the European Union | European Union | Access2Markets

06. REGULATORY ENVIRONMENT

6.1. Import Regulations

While Turkish products benefit from 0% customs duties, **Value Added Tax (VAT or IVA)** is still payable upon import into Spain. Spanish businesses registered for VAT can reclaim this tax through their regular VAT returns.

21%

VAT in Spain

calculated on the customs value, which includes the invoice amount plus transport, insurance, and related costs

Spain also has **free zones** (e.g., Barcelona, Cádiz, Vigo), where goods can be imported and stored **without paying VAT**, as long as they are not released into free circulation.

Finally, Spain applies a **plastic packaging tax of €0.45 per kg** on **non-reusable plastic packaging**. If imported goods contain such packaging, this tax applies.

In summary, with regard to regulations in Spain:

Key Trade Framework

- EU–Turkey Customs Union (since 1995)
- 0% customs duties on industrial goods

Key Regulations for Food-Contact Products

- Reg. (EC) 1935/2004 – Food safety
- Reg. (EC) 2023/2006 – Good Manufacturing Practice (GMP)
- Reg. (EU) 10/2011 (as updated by 2025/351) – Plastic migration
- Declaration of Compliance required

Import Requirements

- SAD (Single Administrative Document)
- EORI number
- Certificates of origin, inspection, transport docs
- Spanish labeling required

Taxes & Costs

- VAT (IVA): 21%
- Plastic Packaging Tax: €0.45/kg for non-reusable packaging
- Free Zones: VAT exemption for stored goods

Source: Council of the European Union | European Union | Access2Markets

06. REGULATORY ENVIRONMENT

6.2. Main Certifications / Standards

To understand the regulatory requirements for entering the Spanish kitchenware and houseware market, input was gathered from Spanish retailers and market stakeholders. The findings reveal a set of certifications that are either mandatory or highly recommended for companies seeking market entry. These certifications can be grouped into two categories: **Spain-specific certifications**, which address local regulatory or market expectations, and **general international standards**, which are widely recognized and applied across the European market, including Spain.

Regarding the certifications required/recommended in Spain:

FSC - products made from wood or bamboo, such as kitchen utensils, handles, or decorative accessories, should preferably be FSC (Forest Stewardship Council) certified. This seal ensures that the raw material was obtained responsibly, from sustainably managed and traceable forests. Environmentally focused retailers, such as Carrefour and Lidl, often require this certification.

Ecoembes - this entity ensures that packaging is correctly declared, recycled, and managed in a sustainable manner, in accordance with current environmental legislation in Spain. Being registered with Ecoembes demonstrates that the supplier takes responsibility for the environmental impact of its packaging.

REACH - As mentioned in the previous subchapter, this European regulation ensures that products do not contain hazardous chemicals such as phthalates, heavy metals, or prohibited solvents. This compliance is mandatory for virtually all products marketed in the EU and is especially relevant for kitchen utensils, plastic items, silicone, fabrics, paints, or varnishes. Many retailers request a REACH compliance statement accompanied by laboratory tests.

Source: SGS | ISO | ECHA

06. REGULATORY ENVIRONMENT

6.2. Main Certifications / Standards

ISO 9001 - one of the most valued by retailers, as it guarantees that the company has well-organized production processes, with a focus on quality and continuous improvement. This certification conveys confidence that the supplier is capable of maintaining consistent standards, meeting deadlines, and responding effectively to production problems. It is often requested by large groups such as El Corte Inglés, Carrefour, and Mercadona.

GOTS - for textiles produced with organic fibers, such as organic cotton, GOTS (Global Organic Textile Standard) certification is an added value. It guarantees that the fiber is truly organic and that the entire production process, from farming to packaging, follows strict environmental and social criteria. It is highly valued by retailers with ecological concerns.

OEKO-TEX Standard 100 - in the case of home textiles (towels, cloths, curtains, etc.), OEKO-TEX certification is one of the most sought after. It guarantees that fabrics are free from substances harmful to human health, such as carcinogenic dyes or heavy metals. It is especially valued by retailers such as El Corte Inglés, Lidl, and Carrefour.

CE marking - as mentioned previously, for products with electrical components (such as grills, hand blenders, or electric mills), it is mandatory to ensure compliance with European Union safety directives through CE marking. This seal is a legal guarantee that the product has been tested and meets essential safety and performance requirements. No Spanish retailer will accept products that require CE marking and do not display it.

Source: ISO | FSC | Ecoembes | CE | GOTS | OEKO-TEX

06. REGULATORY ENVIRONMENT

6.2. Main Certifications / Standards

When it comes to international standards that are not required/mandatory in Spain, but can add value to international suppliers, it is important to consider:

HACCP - Hazard Analysis and Critical Control Points (HACCP) is a systematic preventive approach to food safety. It identifies physical, chemical, and biological hazards in production processes, establishes critical control points, sets monitoring procedures, and implements corrective actions. While HACCP is primarily used in food production, its principles can also be applied to the manufacture of food utensils and other food contact materials. In these cases, HACCP helps prevent contamination during production and ensures materials are safe for food contact.

ISO 14064 - provides guidelines for quantifying, monitoring, reporting, and verifying greenhouse gas emissions and removals at the organizational or project level. Part 1 specifies requirements for organizational inventories, while Part 2 covers project-level quantification and Part 3 addresses validation and verification.

ISO 22000 - specifies requirements for a Food Safety Management System that integrates communication, system management, prerequisite programs, and HACCP principles. While mainly for food operations, it can also be applied indirectly to kitchenware manufacturers, helping ensure products are safe for food contact and meet international standards - especially when supplying the food industry or exporting.

ISO 45001 - is the global standard for Occupational Health and Safety Management Systems. It provides a framework to improve employee safety, reduce workplace risks, and create better, safer working conditions. Certification demonstrates an organization's commitment to proactive hazard identification and prevention.

Source: SGS | ISO

06. REGULATORY ENVIRONMENT

6.2. Main Certifications / Standards

ISO 50001 - outlines requirements for establishing, implementing, maintaining, and improving an Energy Management System. It enables organizations to follow a structured approach to achieve continual improvement in energy performance, including energy efficiency, use, and consumption.

B Corp - this certification is awarded by the nonprofit B Lab to companies meeting verified standards of social and environmental performance, accountability, and transparency. To earn this mark, firms undergo a comprehensive assessment of governance, worker practices, community engagement, and resource stewardship. It signals a genuine commitment to balancing profit with purpose.

NSF International - certification ensures that food equipment and materials in contact with food meet strict public health and safety standards. NSF tests products for sanitation, chemical residues, and performance. A mark from NSF signals that a product is safe for use in professional foodservice environments.

SA8000 - is a global social accountability standard that encourages organizations to develop, maintain, and apply socially acceptable practices in the workplace. It covers child labor, forced labor, health and safety, freedom of association, discrimination, working hours, and compensation.

The certification landscape for kitchenware and houseware products in Spain combines local regulatory needs with broader European standards. Spain-specific certifications like Ecoembes and the emphasis on FSC reflect a strong environmental focus, while international standards remain essential markers of quality, safety, and ethical production for Spanish retailers.

Source: B Corp | Ecocert GOTS | NSF | SA8000

06. REGULATORY ENVIRONMENT

6.2. Main Certifications / Standards

As the **European Green Deal** gains momentum, sustainability is becoming a central requirement in trade relations within the EU. Spain, as a committed EU member, is progressively aligning its import standards with the Green Deal's objectives, prioritizing environmental responsibility, circular economy practices, and low-impact supply chains.

This shift is influencing the expectations of Spanish retailers, who increasingly favor suppliers that can demonstrate **eco-conscious practices** and **verified environmental compliance**. For Turkish exporters, adapting to this new landscape means not only meeting traditional regulatory requirements, but also integrating sustainability into product development, packaging, and sourcing strategies.

Some certifications considered by retailers, based on the European Green Deal

Beacause of the Green Deal, textile products from Turkey (eg.), are also subject to additional scrutiny regarding the origin of fibers, cultivation methods, and the environmental impact of manufacturing.

In conclusion, in today's sustainability-focused European market, certifications play a critical role in ensuring both **compliance and competitiveness**. For exporters targeting Spain, aligning with key international standards alongside country-specific requirements like Ecoembes registration, is essential.

Driven by the goals of the European Green Deal, Spanish retailers are increasingly selecting suppliers based on their **environmental and social performance**. As a result, Turkish manufacturers must not only meet legal standards but also demonstrate clear commitments to sustainability, transparency, and responsible production. In this context, certifications have become more than formalities, they are strategic tools for accessing and succeeding in the Spanish market.

07.
MAIN OPPORTUNITIES AND CHALLENGES IN THE MARKET

07. MAIN OPPORTUNITIES AND CHALLENGES IN THE MARKET

Understanding both the **opportunities and challenges** in a target market is essential for developing an **effective and sustainable export strategy**. Identifying opportunities helps businesses align their offerings with current market trends and consumer demands, while recognising potential challenges allows them to anticipate risks, adapt proactively, and make informed decisions. This balanced perspective is key to entering a new market with confidence and long-term competitiveness.

Effectively, Spain presents a highly **accessible market** for Turkish exporters – its EU membership and geographical proximity reduce technical and logistical barriers. The EU-Turkey Customs Union further facilitates trade by allowing Turkish products to enter the Spanish market tariff-free, enabling faster and more competitive exports.

Spanish consumers are increasingly interested in **sustainability** – there is strong demand for eco-friendly materials such as glass, bamboo, and recycled plastics. This "green demand" gives an edge to brands that prioritize **environmental responsibility**. There is also growing pressure for sustainable packaging, creating further opportunities for suppliers with eco-friendly solutions.

Consumers are increasingly **price-sensitive**, with a clear preference for mid-range products that balance quality and cost. This opens the door for cost-efficient imports that can compete with more expensive domestic or Western European alternatives.

07. MAIN OPPORTUNITIES AND CHALLENGES IN THE MARKET

The **growth of e-commerce** in Spain is opening new direct-to-consumer channels – reducing exporters' dependence on large retailers and enabling easier testing of new products or brands. Digital marketing and cross-border platforms are effective tools to reach younger Spanish consumers.

The Spanish **retail landscape is becoming more open to new and differentiated brands** – offering space for alternatives to dominant private-label products. Niche markets like organic and plastic-free goods are gaining traction, especially among urban and health-conscious consumers.

Spain's **persistent trade deficit** reflects an import reliance, indicating strong demand unmet by local production – especially for well-designed, functional, and competitively priced products. **Tourism** further drives demand in sectors such as food, home goods, and personal care.

Moreover, **regional diversity** within Spain – particularly in areas like Catalonia, Andalusia, and the Basque Country – provides varied entry points, allowing exporters to tailor their strategies to local consumer preferences.

07. MAIN OPPORTUNITIES AND CHALLENGES IN THE MARKET

Despite the many opportunities, exporters must consider **key challenges**. **Competition** is strong – both from local players and other EU or Mediterranean exporters. Spanish consumers tend to be brand loyal and often favour European or locally produced goods – making it harder for new foreign brands to gain trust and visibility.

Regulatory compliance can also be a barrier, particularly regarding EU standards on product safety, labeling, and environmental impact - including packaging waste rules, REACH regulations (for chemicals), and CE marking for certain goods. Exporters must ensure full alignment with these requirements to avoid delays or rejections at the border.

Language and cultural differences present another challenge. While English is widely used in business, Spanish is essential for product packaging, customer service, and marketing materials to connect effectively with consumers and distributors.

In the retail and distribution sector, **gaining shelf space** - especially in large supermarket chains -can be difficult and often requires significant negotiation power or local partnerships. Additionally, although e-commerce is growing, **building trust with Spanish online consumers** takes time and investment in localized digital marketing, returns policies, and customer service.

Price pressure is also notable, as Spanish consumers - especially in the current **inflationary climate** - expect strong value for money, which can compress margins for exporters. Finally, **logistics**, while facilitated by proximity, can still pose issues, particularly around last-mile delivery in urban areas or port congestion.

07. MAIN OPPORTUNITIES AND CHALLENGES IN THE MARKET

The Spanish homeware and kitchenware market offers a compelling **mix of opportunities and challenges** for exporters aiming to establish a sustainable and competitive presence.

On one hand, Spain's EU membership, geographic proximity to Turkey, and participation in the EU-Turkey Customs Union significantly **lower traditional trade barriers**, making it one of the more accessible Western European markets. Additionally, structural factors such as a persistent trade deficit, increasing consumer demand for eco-friendly products, and the rapid expansion of e-commerce platforms create **fertile ground** for innovative and cost-efficient foreign brands.

On the other hand, penetrating the Spanish market requires exporters to **overcome notable obstacles.** Strong competition from established European and local players, high levels of brand loyalty, and a culturally specific retail landscape can **slow down brand visibility and consumer trust**. Regulatory compliance, especially with EU environmental, safety, and labeling standards, is non-negotiable and may **require upfront investment**. Language and cultural adaptation are also critical, not just for marketing and packaging, but for building effective relationships with distributors and end consumers.

In conclusion, Spain is a **high-potential but demanding market** for homeware and kitchenware exporters. Long-term success will depend on a strategic balance between seizing emerging opportunities, especially in sustainability and e-commerce, and addressing structural, regulatory, and cultural challenges.

Turkish exporters that invest in local knowledge, compliance, differentiation, and relationship-building will be best positioned to establish a **strong foothold and thrive** in this competitive European landscape.

2025

08.
CONCLUSION & ACTIONABLE INSIGHTS

08. CONCLUSION & ACTIONABLE INSIGHTS

The Spanish home and kitchenware market presents a **dynamic and steadily growing landscape**, especially **attractive** for Turkish exporters supported by IMMIB. While overall growth may be modest in some segments, the sector is defined by evolving consumer **sophistication**, increased **eco-consciousness**, and demand for **design-oriented**, **functional**, and **high-quality products**.

Globally, the houseware market is projected to reach **USD 513 billion** by 2034, with the kitchenware segment alone expected to grow to **USD 109.7 billion**. In Spain, the **homeware sector is led by the kitchen category**, which accounts for the largest share of the market. However, other high-potential segments - such as **bathroom accessories** - are expected to **grow at double-digit rates**, driven by ongoing urbanization and rising demand for minimalist, space-efficient designs.

Turkish companies are already well-positioned in the Spanish market across the following key product categories:

- **Table and kitchen ceramics (HS 691110):** Turkey ranks as the second-largest supplier to Spain, exporting USD 12.3 million in 2024.
- **Glass kitchenware (HS 701328):** With a 13% market share, Turkey is again the second-largest exporter in this category.
- **Metal cookware (HS 732111):** Turkey leads with a dominant 26.7% of Spanish imports.
- **Plastic products (HS 392410 & 392490):** While not leading, Turkish exporters maintain a consistent presence with room for expansion.

08. CONCLUSION & ACTIONABLE INSIGHTS

These figures reflect **Turkey's competitive edge** in terms of **pricing, design, and production capacity**. However, there are still underpenetrated **niches** in the Spanish market - particularly in **premium glassware, tech-integrated kitchen tools**, and **design-led home accessories**. These represent critical opportunities for growth and differentiation.

To capitalize on these opportunities, Turkish homeware brands must adopt a proactive and targeted market entry strategy. Suggested actions include:

- **Localize Communication for the Spanish Market**

Tailor all marketing materials and messaging to resonate with Spanish language preferences and cultural nuances.

- **Develop a Unique Brand Identity**

Highlight the excellence of Turkish craftsmanship, contemporary design, and compelling storytelling to create a distinctive market presence.

- **Establish a Strong Digital Presence**

Launch a dedicated website or landing page that effectively showcases the brand, product portfolio, and relevant certifications.

- **Optimize E-Commerce Strategies**

Enhance product listings on platforms like Amazon.es with targeted promotions and localized content.

- **Leverage Influencer Marketing and Social Media Channels**

Collaborate with local influencers across Instagram, Pinterest, and YouTube to drive brand awareness and consumer engagement.

08. CONCLUSION & ACTIONABLE INSIGHTS

- **Lead a Strategic Trade Mission in Spain**

Organize visits to Madrid and Barcelona to build relationships with key retailers, distributors, and digital marketplaces.

- **Participate in Key Industry Trade Shows**

Increase brand visibility and generate leads by exhibiting at prominent events such as Intergift Madrid and *Feria del Mueble de Zaragoza*.

- **Establish Local Distribution Partnerships**

Secure partnerships with established Spanish distributors to expand in-store presence and market penetration.

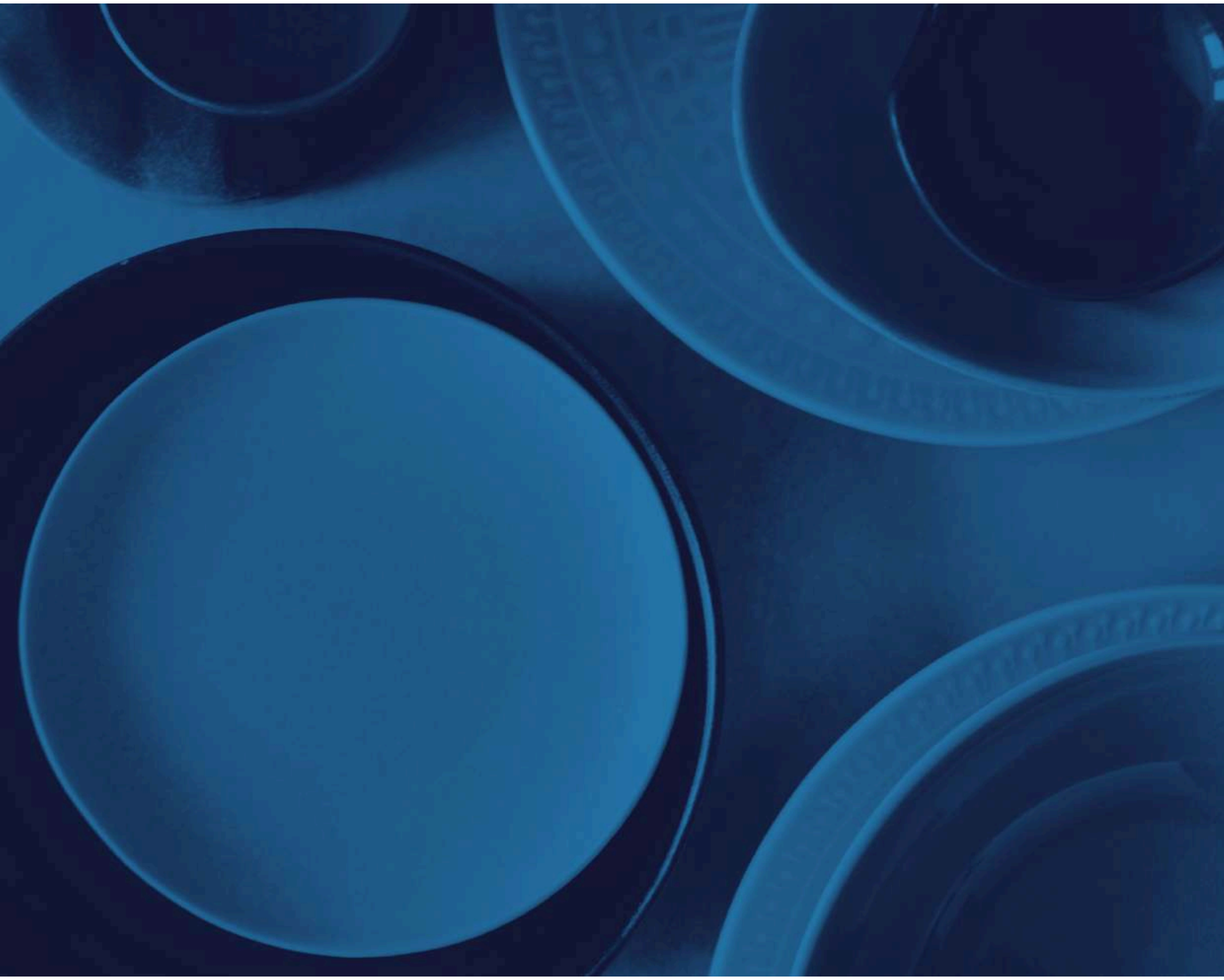
- **Activate In-Store Consumer Engagement Initiatives**

Boost product trials and visibility through live demonstrations and seasonal-themed campaigns within retail environments.

- **Ensure Compliance with EU Standards and Promote Certifications**

Emphasize adherence to ISO, CE, and sustainability certifications to build consumer trust and demonstrate regulatory compliance.

In conclusion, Spain offers Turkish home and kitchenware manufacturers not only a **sizable and accessible market**, but also a well-defined consumer profile that **values aesthetics, functionality, and eco-responsibility**. By aligning product offerings with these trends and executing a focused market development strategy, Turkish companies can increase brand recognition and expand their share in one of **Southern Europe's most promising homeware markets.**



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- Arcos
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- Tatay
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- Cosmic
- Vileda
- Roca
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- European Union
- Access2Markets
- SGS
- ISO
- ECHA
- FSC
- Ecoembes
- CE
- GOTS
- OEKO-TEX
- B Corp
- Ecocert GOTS
- NSF
- SA8000

IMPRESSUM

Market Research Report
Kitchenware & Houseware Sector in Spain

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