



ACIMAC

Association of Italian Manufacturers of
Machinery and Equipment for Ceramics



7th EDITION
year 2019

WORLD PRODUCTION AND CONSUMPTION OF CERAMIC TILES

ACIMAC / MECS - Machinery Economic Studies



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MECS

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WORLD PRODUCTION AND CONSUMPTION OF CERAMIC TILES

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PRESENTATION

The global figures for production, consumption and international trade of ceramic tiles are still increasing on a mid-term analysis, but show for the first time a decrease with respect to 2017.

However, examining the data in greater detail we find that the situation is more complex than might appear at first sight. This is the reason we decided to produce this study, which analyses the **different trends amongst producers, consumers, exporters and importers of ceramic tiles**. First we group the countries by **geographical regions** and then look in greater detail at the specific situations in each of the main countries operating in the international ceramic tile market.

We will find for example that most tiles are produced for sale in nearby markets, while **less than one tile in every ten is shipped to an area not in the immediate vicinity of the place of manufacture**. We will see that China is not only the largest producer and consumer of ceramic tiles but is also the

biggest exporter to more than 70 countries worldwide, although Italy and Spain retain their leading positions in a significant number of markets.

We will discover that the regions with **higher rates of urban population growth** also display higher growth rates in tile consumption.

We will see that Asia is the region in the world that consumes the largest volumes of tiles, although the highest growth rates are in South American and non-EU European countries; that Italy is maintaining its market shares better than Turkey; and that the United States has undergone a profound change in the structure and origin of its imports over the course of a decade.

This study sets out the data in a simple and clear fashion with the aim of providing the reader with a document that can be consulted immediately and simply as a work tool. It also provides an overview of the entire international sector and the outlook for the future.

Paolo Gambuli
Director ACIMAC



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Sample Pages

1.1 WORLD TILE PRODUCTION: RECENT HISTORICAL TRENDS BY GEOGRAPHICAL AREA

Analysing tile production from 2009 to 2018 (Table 1.1), we find an increase in production on the part of certain Asian countries and at the same time a contraction in the output of EU countries. Whereas in 2009 Asia produced five times the volume of tiles manufactured in the European Union, today this ratio is almost 7:1 (Chart 1.1.B). In Asia, tile production rose at an average annual rate of 5.4% since 2009, though facing a decrease in 2018 (down 5.2 on the previous year), accounting for 68.6% of total world production. During the same period, Europe registered an average annual increase in output of 2.6% (10.4% of the world total).

In addition to Asia, other continents have seen a considerably increase in output since 2009. In 2018, **Latin America** produced 1,064 million sqm, and marked up an average annual growth rate of 1.5% over the period 2009-2018, even if in 2018 registered the fourth decrease in a row, -0.9% with respect to 2017. **European countries outside the EU** produced 618 million sqm in 2018 (an average annual growth rate of 5.3% since 2009), while **Africa** produced 718 million sqm (average annual growth of 8.3%), and the **NAFTA** region, headed by Mexico, produced 348 million sqm (average annual growth of 3.3%).

TABLE 1.1 - WORLD TILE PRODUCTION BY GEOGRAPHICAL AREA - Values in millions of sq.m

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% on 2018 world production	Var% 18/17	CAGR 18/09
EU	1,088	1,139	1,188	1,179	1,185	1,192	1,218	1,304	1,362	1,366	10.4%	0.3%	2.6%
Other Europe	387	447	480	524	606	570	567	573	615	618	4.7%	0.5%	5.3%
NAFTA	259	272	290	302	306	308	330	358	362	348	2.7%	-3.9%	3.3%
South America	932	1,001	1,098	1,138	1,158	1,194	1,193	1,086	1,074	1,064	8.1%	-0.9%	1.5%
Asia	5,583	6,395	7,228	7,714	8,327	8,717	8,664	9,383	9,473	8,980	68.6%	-5.2%	5.4%
Africa	350	377	345	374	393	442	498	571	696	718	5.5%	3.2%	8.3%
Oceania	7	6	5	5	5	5	5	5	5	5	0.0%	0.0%	-3.7%
TOTAL	8,606	9,637	10,634	11,236	11,980	12,428	12,475	13,280	13,587	13,099	100.0%	-3.6%	4.8%

CHART 1.1 - WORLD TILE PRODUCTION - TOTAL DATA - Values in millions of sq.m

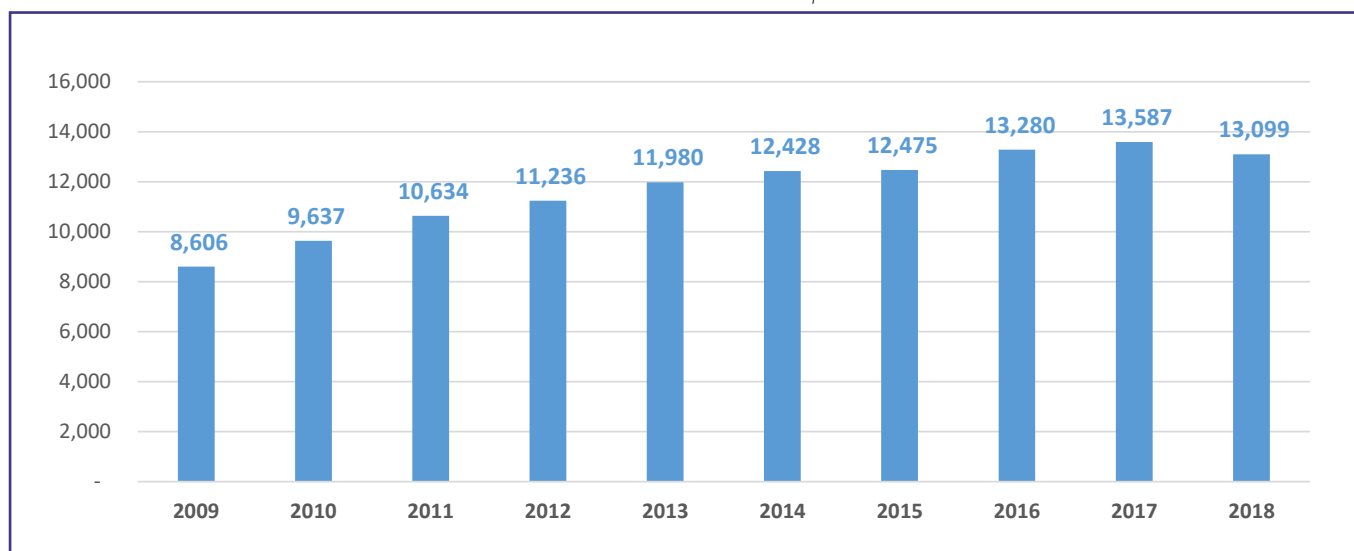
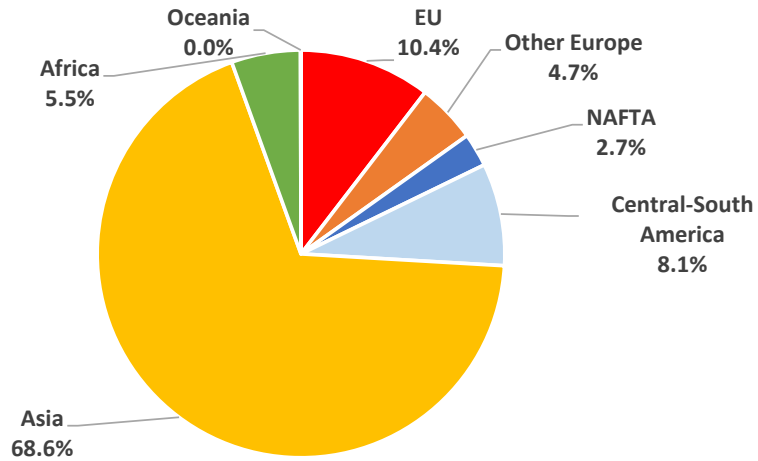


CHART 1.1.A - WORLD TILE PRODUCTION BY GEOGRAPHICAL AREA IN 2018 - % shares



Production in 2018

CHART 1.1.B - WORLD TILE PRODUCTION BY GEOGRAPHICAL AREA (2009 - 2018) - % shares

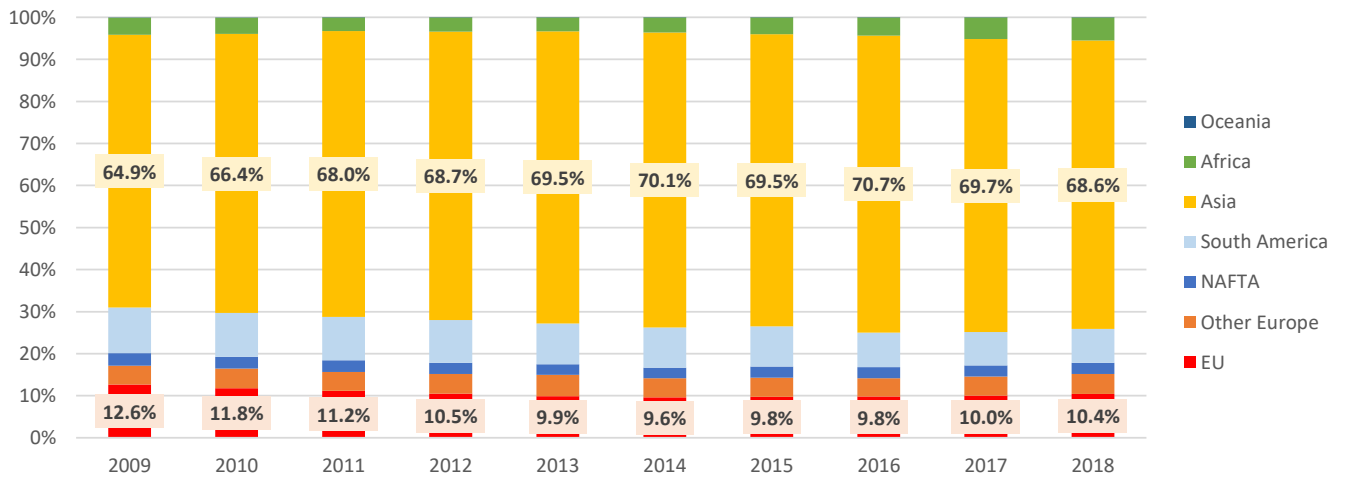
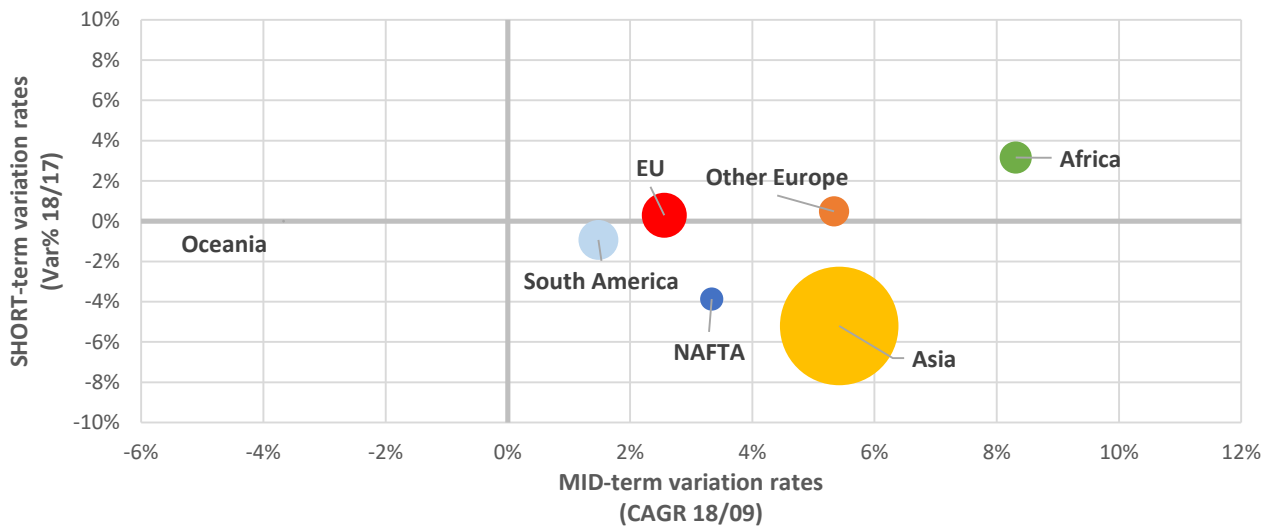
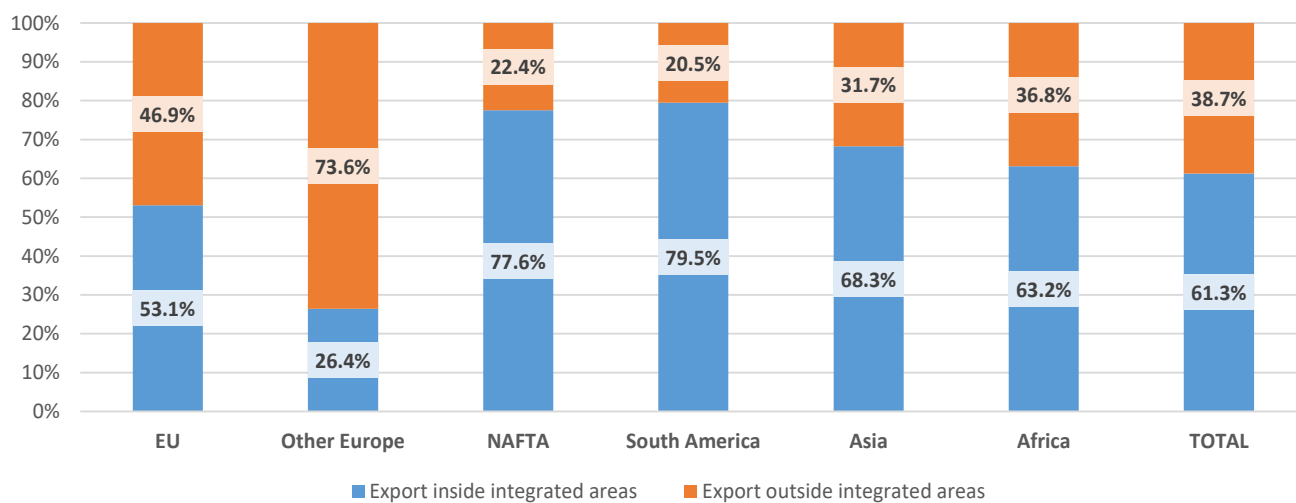


CHART 1.1.C - WORLD TILE PRODUCTION BY AREAS - VAR. IN SHORT AND MEDIUM TERM - Var. %

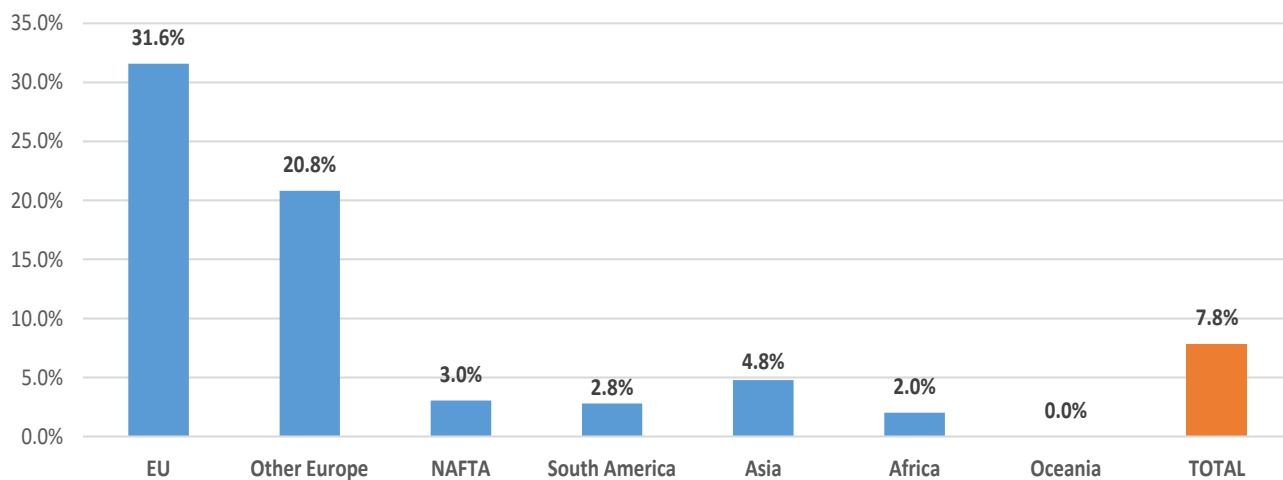


The size of the circles is proportional to the volumes of tiles produced in 2018

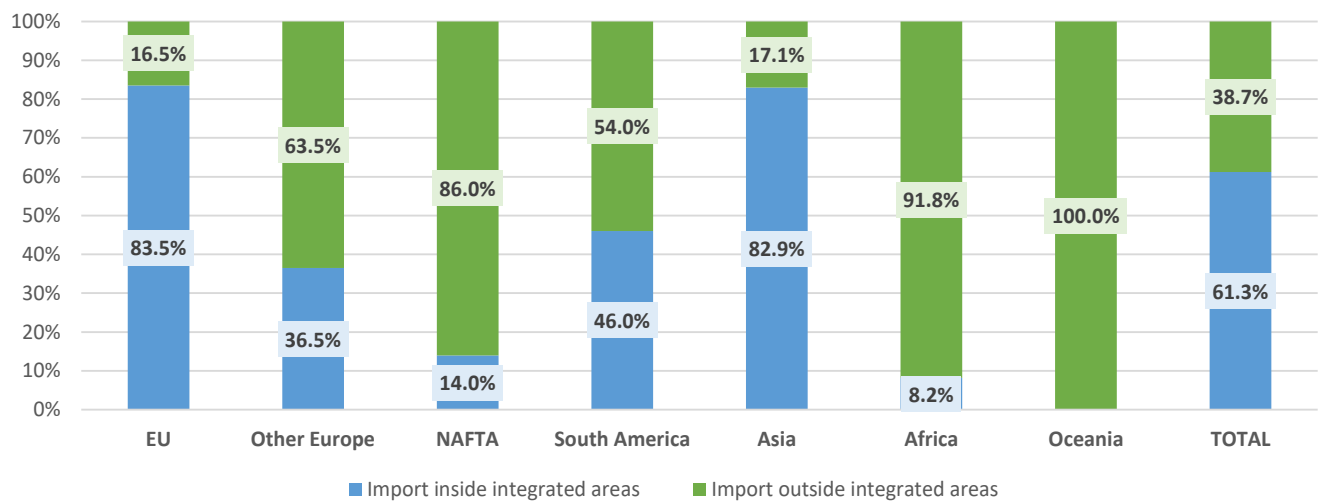
1.4.A - % EXPORTS OUTSIDE INTEGRATED AREA IN 2018 ON TOTAL EXPORTS - % shares



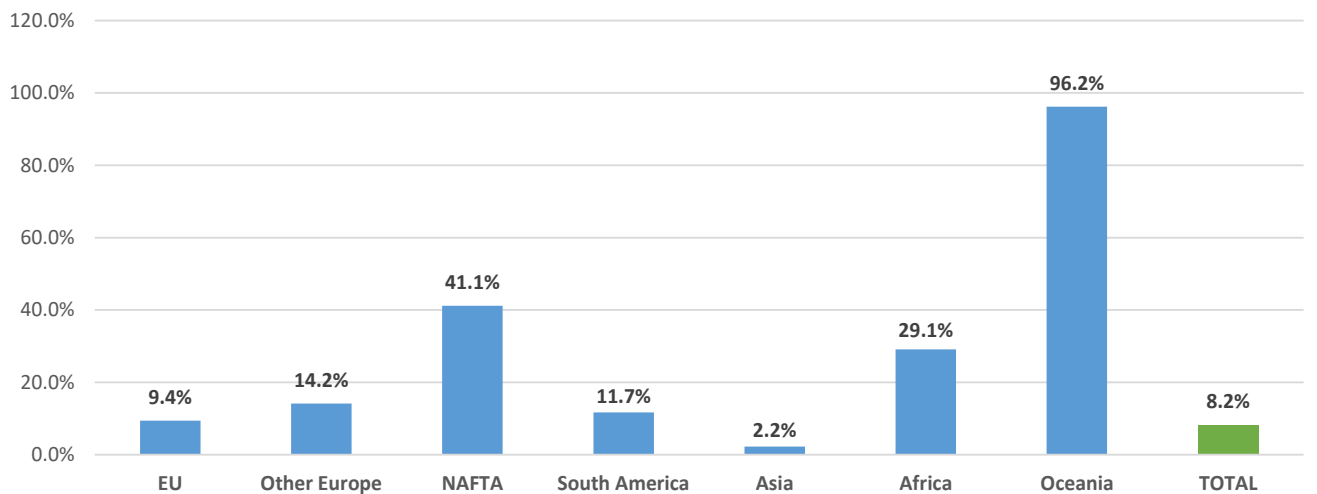
1.4.B - % EXPORTS OUTSIDE INTEGRATED AREA IN 2018 ON TOTAL PRODUCTION - % shares



1.4.C - % IMPORTS OUTSIDE INTEGRATED AREA IN 2018 ON TOTAL IMPORTS - % shares



1.4.D - % IMPORTS OUTSIDE INTEGRATED AREA IN 2018 ON TOTAL CONSUMPTION - % shares



LATIN AMERICA

2. BRAZIL



Brazil is the world's third largest ceramic tile producer and consumer and sixth largest exporter. Exports changed from 59.2 million sqm in 2009 to

100.6 million sqm in 2018, corresponding to an average annual increase of 6.1%.

Brazilian exports have always been focused on the

TABLE AND CHART 2.1 - BRAZIL: KEY INDICATORS - Values in millions of sq.m

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Var 18/17	Var 17/16	Var 16/15
Production	715	754	844	866	871	903	899	792	790	793	0.4%	-0.3%	-11.9%
Export	61	57	60	59	63	69	77	94	90	100	11.1%	-4.3%	22.1%
Import	12	25	41	41	50	38	19	7	7	6	-14.3%	0.0%	-63.2%
Consumption	644	700	775	803	837	853	816	706	708	702	-0.8%	0.3%	-13.5%

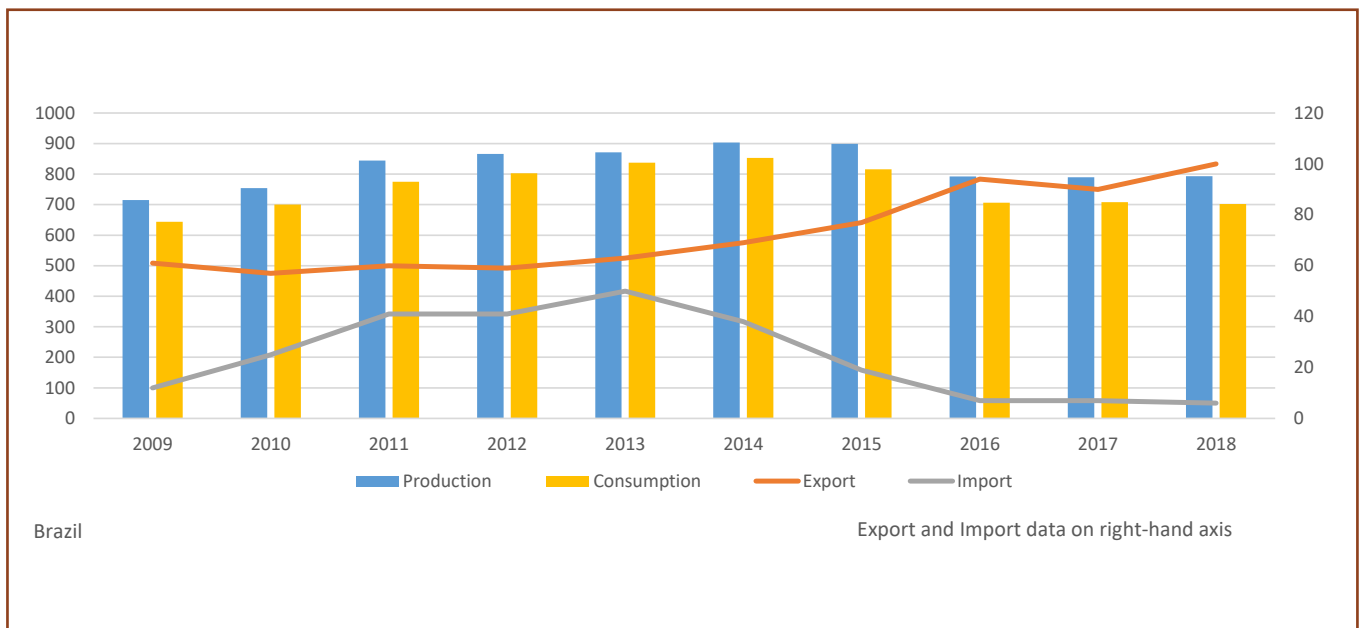
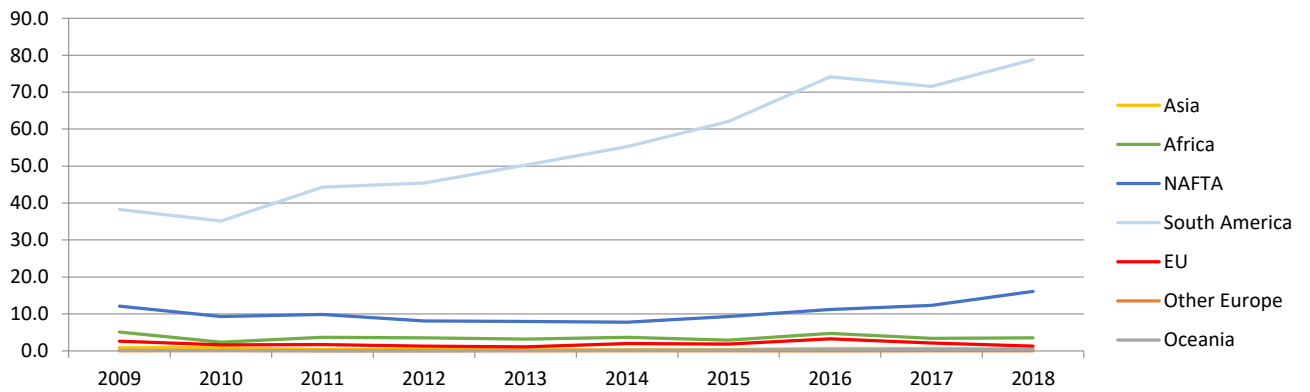
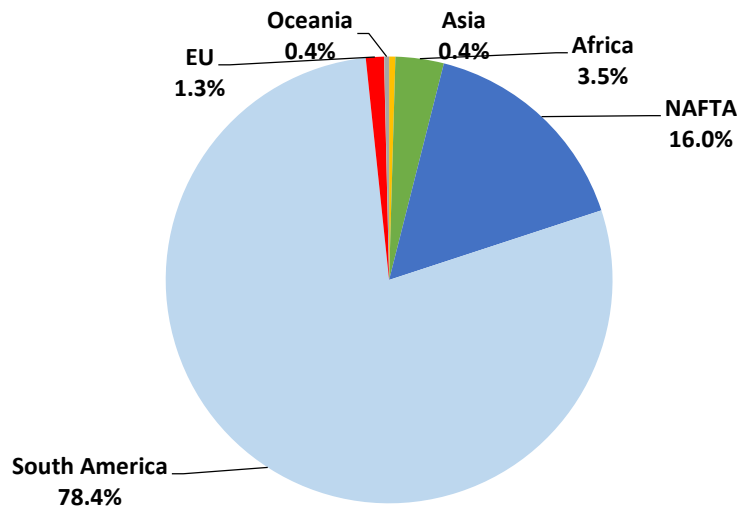


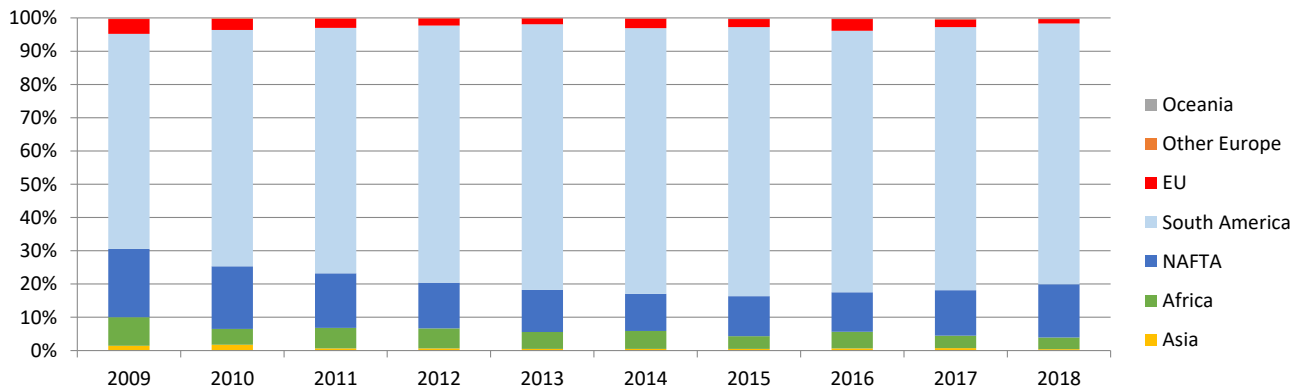
TABLE 2.2 - BRAZIL: TILE EXPORTS BY GEOGRAPHICAL AREA - Values in millions of sq.m

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Shares	Var 18/17	CAGR 18/09
Asia	0.9	0.9	0.4	0.4	0.3	0.3	0.4	0.6	0.6	0.5	0.4%	-28.5%	-6.8%
Africa	5.1	2.4	3.7	3.5	3.2	3.7	2.9	4.7	3.4	3.5	3.5%	3.4%	-4.1%
NAFTA	12.1	9.3	9.9	8.1	7.9	7.8	9.3	11.2	12.3	16.1	16.0%	30.5%	3.2%
South America	38.3	35.2	44.3	45.5	50.3	55.2	62.1	74.2	71.5	78.8	78.4%	10.1%	8.4%
EU	2.7	1.6	1.7	1.3	1.1	2.0	1.9	3.3	2.1	1.3	1.3%	-38.0%	-7.5%
Other Europe	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	325.0%	-11.9%
Oceania	0.2	0.1	0.0	0.1	0.1	0.1	0.3	0.3	0.4	0.4	0.4%	-4.3%	9.7%
TOTAL	59.2	49.4	60.1	58.8	62.9	69.2	76.8	94.3	90.4	100.6	100.0%	11.2%	6.1%

CHARTS 2.2 - BRAZIL: TILE EXPORTS BY GEOGRAPHICAL AREA - Values in millions of sq.m and in %



Brazil - export in volume



Brazil - export in %