

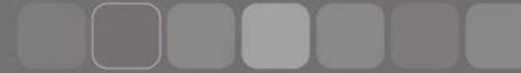


World Ceramic Tiles Forum – National Context

Germany



National Context – Germany

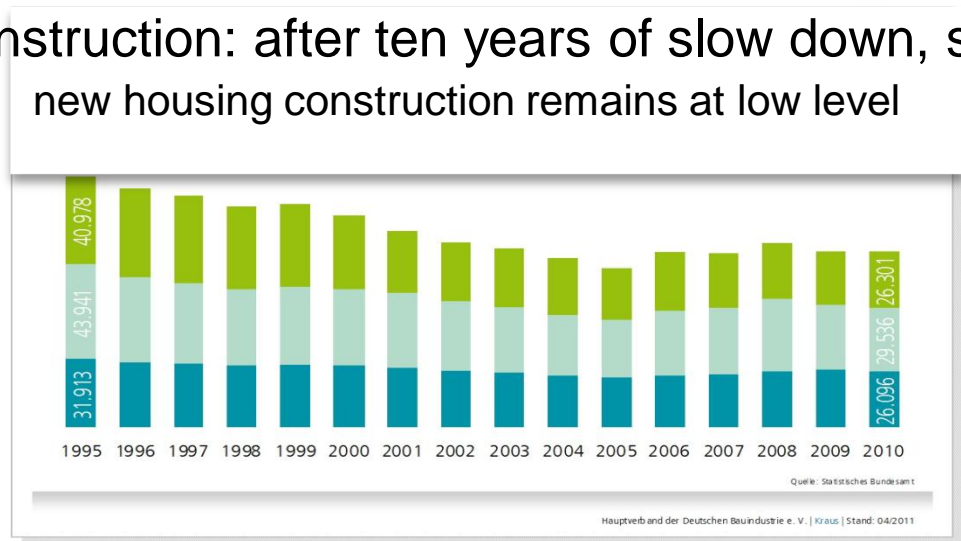


- I. General economic situation and trend in the construction sector/demand
- II. Trend in production, consumption and trade in ceramic tiles
- III. Latest developments at national level in energy supply regulation and taxation
- IV. Development in standardisation or regulation at national level affecting ceramic tiles
- V. Other national developments

I. General economic situation, trend in the construction sector/demand



- Financial crisis (Greek etc.) affecting economic situation heavily
 - Mainly because, solution is not in sight
- GDP: growth still positive, but slowing down in 2011 and 2012
 - Europe 2011: 1,7%
 - Germany 2011: 3,3%
- Construction: after ten years of slow down, slight recovery since 2006
 - new housing construction remains at low level



II. Trend in production, consumption and trade in ceramic tiles



- Production has dropped about 28% in 2009/2008
- Export quota is at 49%
- Consumption is regaining after drop of around 50% in the past years

III. Latest developments at national level in energy supply regulation and taxation



- Exit of Nuclear Power Generation until 2022
 - Immediate loss of 8,5 GWh secure Capacity
 - Total loss until 2022 35 GWh secure Capacity
 - Will lead to higher costs
- Highest price level and level of taxation of energy use in Europe
- Taxation for financing renewables at 3,5 EUR Cent/Kwh (+70%)

IV. Any development in standardisation or regulation at national level affecting ceramic tiles

- Very high standard on environmental legislation affects also tiles production
- Construction Product Directive
 - Example: Sustainability
- Relevant Standardisation on CEN (EU) and ISO level
- Slipperiness of flooring – important issue
 - Ramp test DIN 51130
 - Slider test DIN 51131

V. Other national developments



- Trained and specialized labour craft is becoming an important issue
- training of tile fixer is top issue
- Trained and specialized handicraft not easy to get (lack of training and competition with other industries)