

World Ceramic Tiles Forum – National Context

Germany
Shanghai 2014



National Context – Name of the country

- I. 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 relevant to the ceramic tiles sector

I. Trend in the construction sector/demand

- General economic situation

GDP: 2013: + 0,1%
2014: + 1,3%
2015: + 1,2% (1%)

- Low interest rates
- Uncertainty with regard to international crisis (Ukraine..)

- Construction sector (turnover)



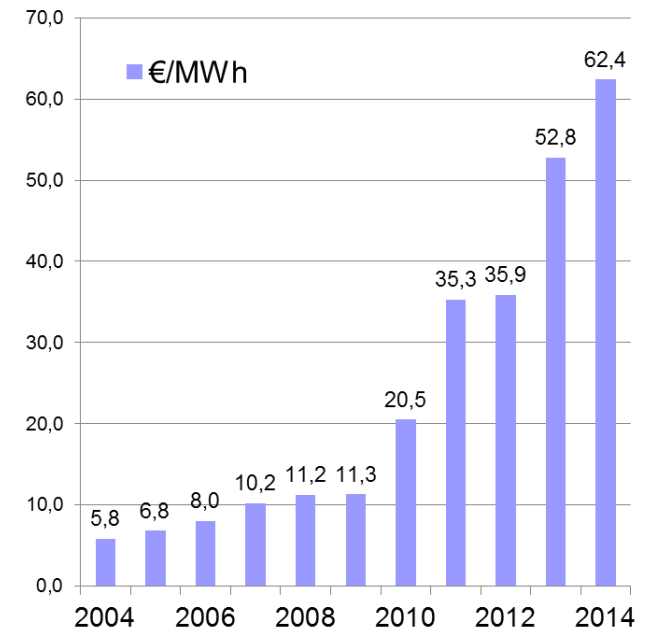
II. Trend in production, consumption and trade in ceramic tiles



- **Production**
 - 2012: 55,6 Mio. sqm (+1,1%)
 - 2013: 53,5 Mio. sqm (-3,8%)
- **Consumption**
 - 2012: 116,0 Mio. sqm (-1,3%)
 - 2013: 112,0 Mio. sqm (-3,4%)
- **Import**
 - 2012: 89,6 Mio. sqm (-2,6%)
 - 2013: 85,5 Mio. sqm (-2,2%)

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

- Emission trading, an additional burden to industry
- Energy costs are rising continuously
- Cost for renewables at 62,14 €/MWh (+18,2%)
- Energy taxation under revision
 - Energy Management system (EMS) mandatory



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

- Environmental regulation under revision
 - BREF revision started
- Construction Product Regulation(CPR)
 - Labeling and documentation is being checked by authorities
- Strict labour safety rules (including stress factor)
- Safety for pedestrian (slip resistance)

V. Other national developments

- Sustainability is a growing issue
 - Requested increasingly in public building and by architects
 - met with Environmental Product Declaration (EPD) with a cradle to grave approach
- Education and Training is major issue
 - Tile fixer are bottleneck in tile laying – image campaign will start soon
 - Increased engagement of industry
- Image campaign for ceramic tiles vs competing products





- Thank you for your attention

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