

# 2019 World Ceramic Tiles Forum

6 November - 9 November

Westin Grand Hotel Berlin

Berlin, Germany



# 2019 World Ceramic Tiles Forum - National Context -

EU



# 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 at national level
- V. Development in regulations at national level affecting ceramic tiles (notably environmental or health & safety regulation (e.g. silica))
- VI. Other national developments



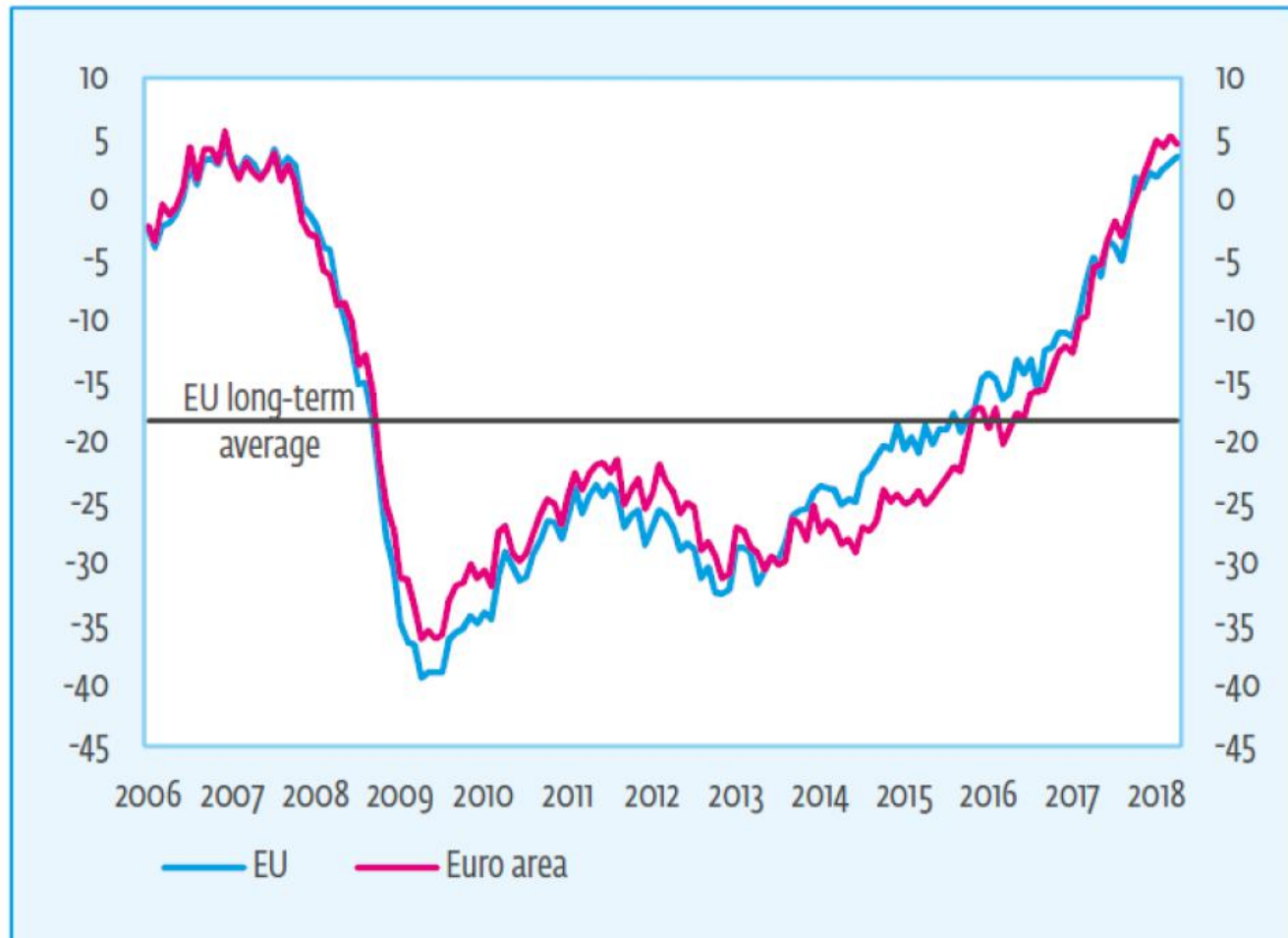
# I. Trend in the construction sector/demand



# EU construction trends

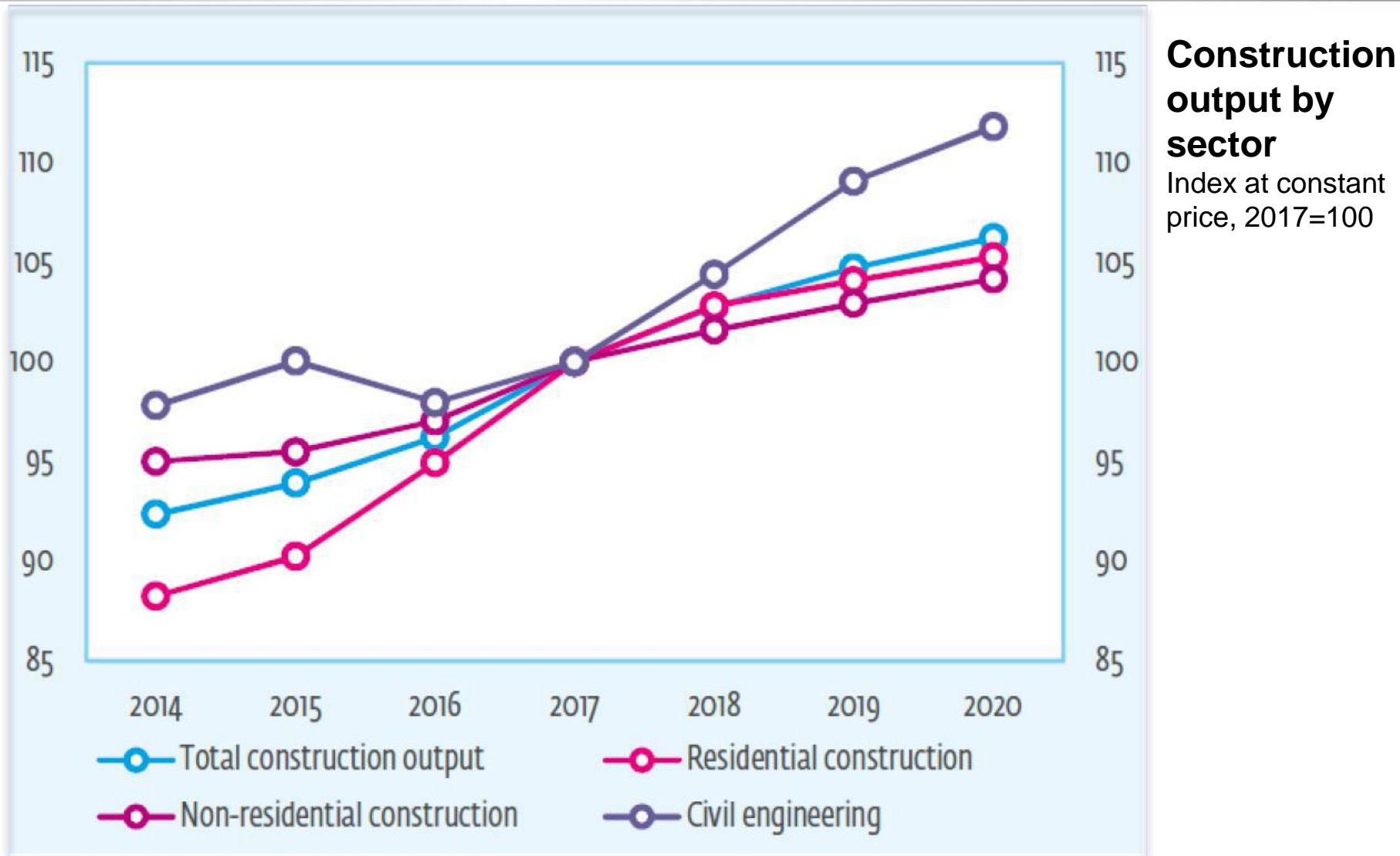
## Construction confidence indicator

balance (%), seasonally adjusted



Source: EUROCONSTRUCT, June 2018, European Commission

# EU construction trends



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



➔ CET gathers ceramic tiles producers present in:

- Austria
- Bulgaria
- Czech Republic
- France
- Germany
- Hungary
- Italy
- The Netherlands
- Poland
- Portugal
- Romania
- Spain
- Turkey
- United Kingdom

# EU Production in 2018



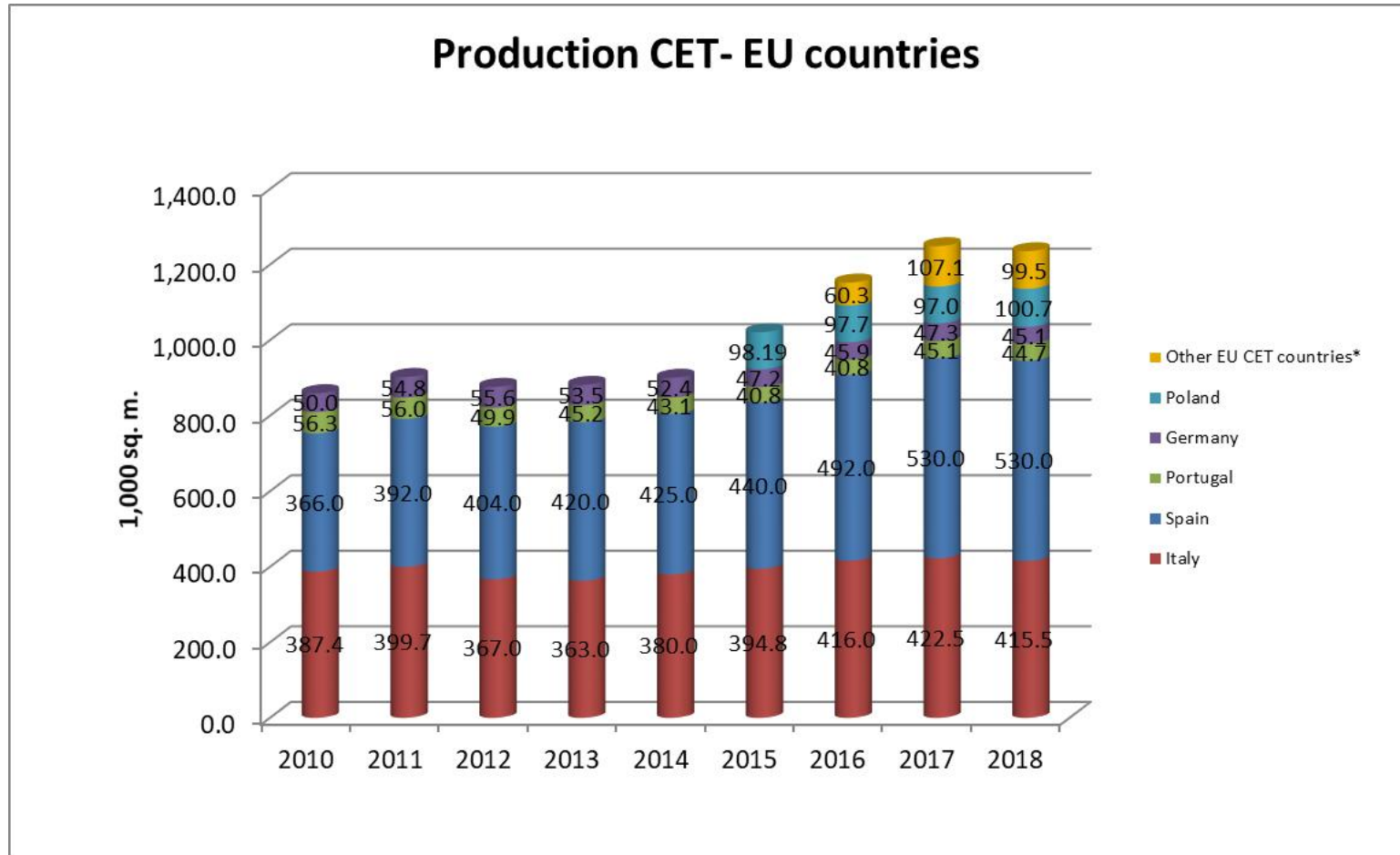
PRODUCTION (million sq.m.)	2010	2011	2012	2013	2014	2015	2016	2017	2018	VAR 2018/17
Italy	387.4	399.7	367.0	363.0	380.0	394.8	416.0	422.5	415.5	-1.6%
Spain	366.0	392.0	404.0	420.0	425.0	440.0	492.0	530.0	530.0	0.0%
Portugal	56.3	56.0	49.9	45.2	43.1	40.8	40.8	45.1	44.7	-0.9%
Germany	50.0	54.8	55.6	53.5	52.4	47.2	45.9	47.3	45.1	-4.7%
Poland						98.19	97.7	97.0	100.7	3.8%
Other EU CET countries*							60.3	107.1	99.5	-7.0%
<b>TOTAL EU CET countries</b>	<b>859.7</b>	<b>902.5</b>	<b>876.5</b>	<b>881.7</b>	<b>900.5</b>	<b>1,021.0</b>	<b>1,152.7</b>	<b>1,248.9</b>	<b>1,235.6</b>	<b>-1.1%</b>
Turkey	245.0	260.0	280.0	330.0	315.0	320.0	330.0	342.0	335.0	-2.0%
<b>TOTAL EU CET + Turkey</b>	<b>1,104.7</b>	<b>1,162.5</b>	<b>1,156.5</b>	<b>1,211.7</b>	<b>1,215.5</b>	<b>1,341.0</b>	<b>1,482.7</b>	<b>1,590.9</b>	<b>1,570.6</b>	<b>-1.3%</b>



**EU production decreased by 1,1% in 2018 in quantity**



# Production



Source: CET data

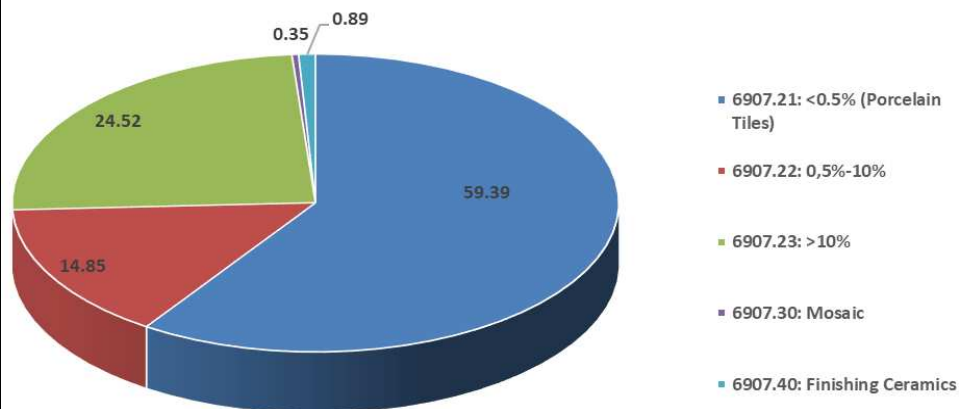
# Consumption

TOTAL EU PRODUCTION - 6907 (1000 sq.m)	IMPORTS EU - 6907 (1000 sq.m)	EXPORTS EU - 6907 (1000 sq.m)
1235557	104404.55	426372.81

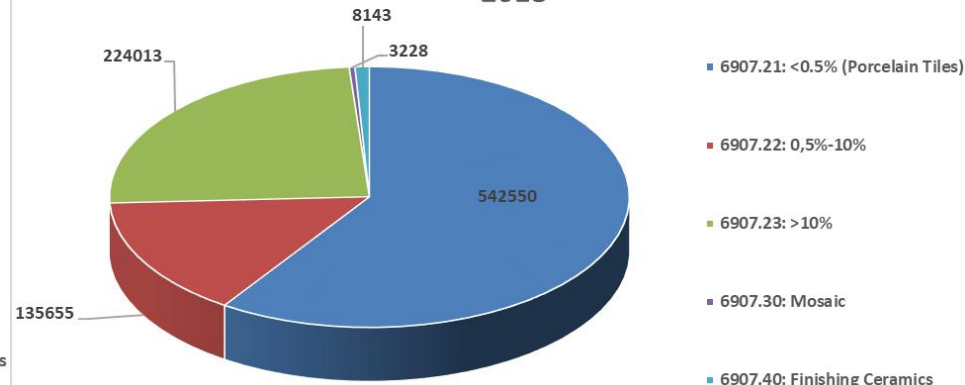
EU CONSUMPTION - 6907 (1000 sq.m)	913588.74
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CODE	EU Total (1000 sq.m)	% Distribution	Consumption (1000 sq.m)
	2018	2018	2018
6907.21: <0.5% (Porcelain Tiles)	619320	59.39	542550
6907.22: 0,5%-10%	154850	14.85	135655
6907.23: >10%	255710	24.52	224013
6907.30: Mosaic	3685	0.35	3228
6907.40: Finishing Ceramics	9295	0.89	8143

% Distribution - Consumption per HS Code - 2018



Distribution - Consumption per HS Code (1000 sq.m) - 2018



# CET Sales

## Total Sales in M sq. m.

	2014	2015	2016	2017	2018	VAR 2018/17 in %
Germany	52.40	47.25	45.90	47.30	45.10	-4.65
Spain	444.00	492.00	526.41	535.40	548.60	2.47
Italy	395.00	396.87	414.55	421.90	410.09	-2.80
Portugal	42.25	37.76	38.89	45.10	44.70	-0.89
Poland*		104.14	100.02	98.35	97.64	-0.72
Other EU CET countries*			63.41	110.14	102.30	-7.12
<b>Total EU CET countries</b>	<b>933.65</b>	<b>1,078.02</b>	<b>1,189.19</b>	<b>1,258.19</b>	<b>1,248.43</b>	<b>-0.78</b>
Turkey	294.52	307.17	325.90	342.00	335.00	-2.05
<b>Total EU CET + Turkey</b>	<b>1,228.17</b>	<b>1,385.19</b>	<b>1,515.09</b>	<b>1,600.19</b>	<b>1,583.43</b>	<b>-1.05</b>



**EU sales decreased by 0,78% in 2018 in quantity**

# CET Sales



CET-EU Sales (M sq.m.)



# CET Sales



## Total Sales in € (million)

	2014	2015	2016	2017	2018	VAR 2018/17 in %
Germany	500.20	475.20	497.30	499.40	483.00	-3.28
Spain	2,902.00	3,095.00	3,315.58	3,495.00	3,597.00	2.92
Italy	4,900.00	5,117.00	5,417.00	5,546.00	5,381.00	-2.98
Portugal	325.00	320.51	330.12	382.20	378.90	-0.86
Poland		519.64	523.08	545.82	549.69	0.71
Other EU CET countries*			401.72	741.91	646.53	-12.86
<b>Total EU CET countries</b>	<b>8,627.20</b>	<b>9,527.35</b>	<b>10,484.80</b>	<b>11,210.33</b>	<b>11,036.12</b>	<b>-1.55</b>
Turkey	1,540.31	1,650.00	1,725.77	1,849.80	1,760.80	-4.81
<b>Total EU CET + Turkey</b>	<b>18,794.71</b>	<b>11,177.35</b>	<b>12,210.57</b>	<b>13,060.13</b>	<b>12,796.92</b>	<b>-2.02</b>
<i>Source: CET data</i>						
<b>Total EU CET countries</b>	<b>8,627.200</b>	<b>9,527.349</b>	<b>10,484.804</b>	<b>11,210.325</b>	<b>11,036.123</b>	<b>-1.554</b>



**EU sales in value decreased by 1,55% in 2018**

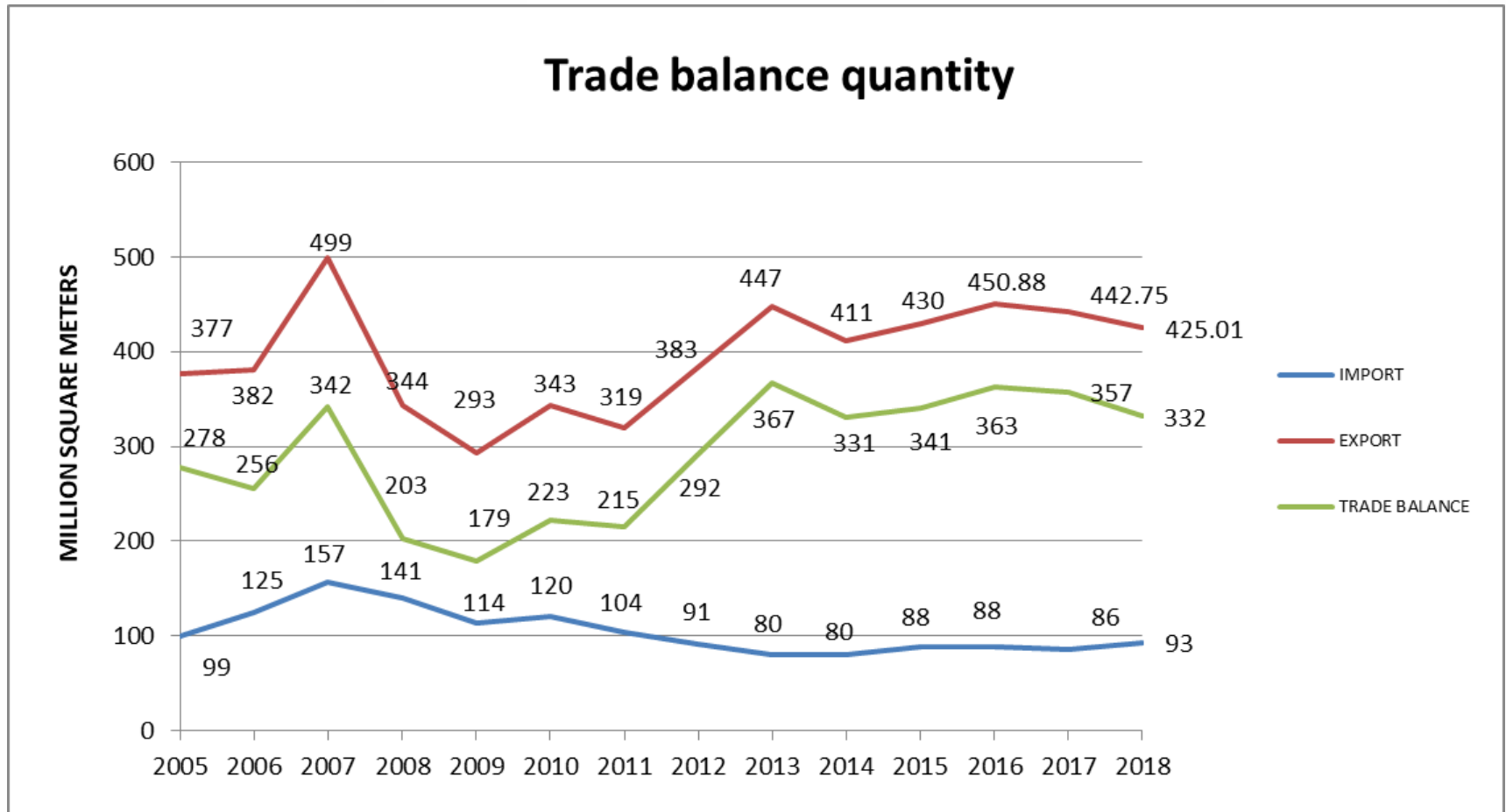
# CET Sales



**CET-EU Sales Value (M Euros)**



# Trade balance QTTY

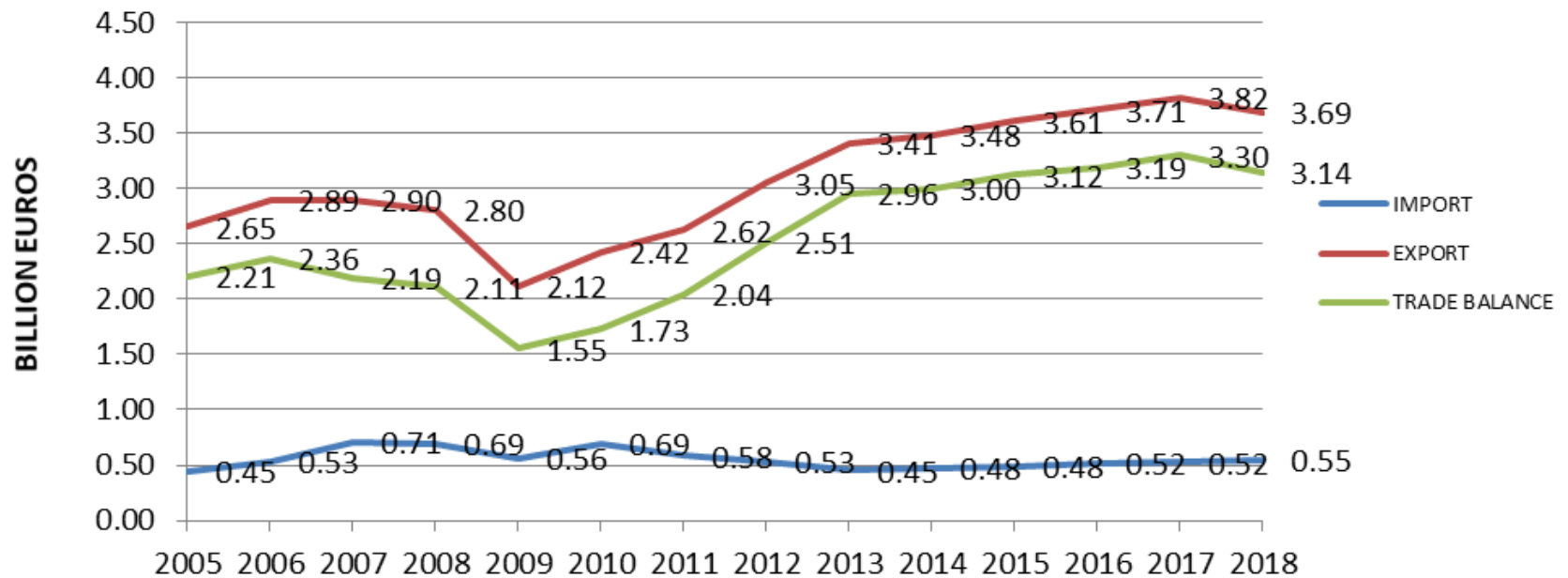


Source: Eurostat data

# Trade balance value



## Trade balance value



Source: Eurostat data



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Thank you for your attention!

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