

2019 World Ceramic Tiles Forum

6 November - 9 November

Westin Grand Hotel Berlin

Berlin, Germany



2019 World Ceramic Tiles Forum - National Context -

JAPAN



National Context – JAPAN



- 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))



I. Trend in the construction sector/demand

■ General Economic Situation

➤ Economic Situation

Increasing in public investment

➤ Effective Job-Offering Rate

Increased to 1.59 times
(as of Aug. 2019)

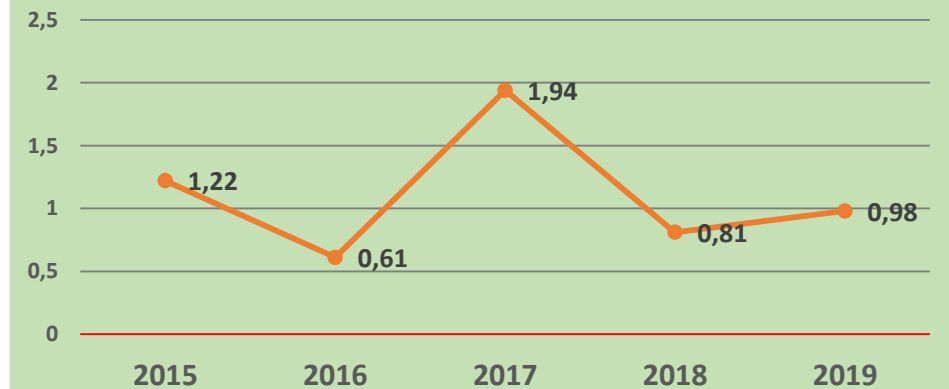
➤ Unemployment Rate

Decreased to 2.2%
(as of Aug. 2019)

JAPAN 2018

Population	126 mil.
GDP	\$5.75 tln.
Exports	\$815 bln.
Imports	\$827 bln.

GDP Growth Annual Rate (%) of JAPAN



I. Trend in the construction sector/demand

■ Construction Industry

- Total government construction investment increased by 4.5 % from 2018.
- Increase in tourism is expected to lead to a construction rush mainly in the Eastern part of Japan (Kanto Region) and tourist spots such as Okinawa.
- Private construction investment is expected to increase by 2.8 %, and both public and private sectors are expected to increase in the long term which will lead to a total of 62.9 trillion Yen (~ \$ 629 bln.), an increase of 3.4 % overall in fiscal year 2019.



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



■ Great Demand for Exterior Wall Tiles

Demand for exterior mosaic (wall) tiles (less than 50 cm²) is about 50 %.

2018 Japan Ceramic Tile Sales		
Domestic market	Domestic products	17.7mil. m ²
	Imports	19mil. m ²
Exports		1.32mil. m ²

■ Construction of Condominiums and Sales of Domestic Exterior Tiles Have Not so Much Been Linked.

Tile users began to avoid exterior wall tiling due to the cost of maintenance.



"Technical advice" was issued by MLIT in May 2018

If a certain condition was met only for adhesive construction, it would be possible to perform one or more tensile inspections for each floor.

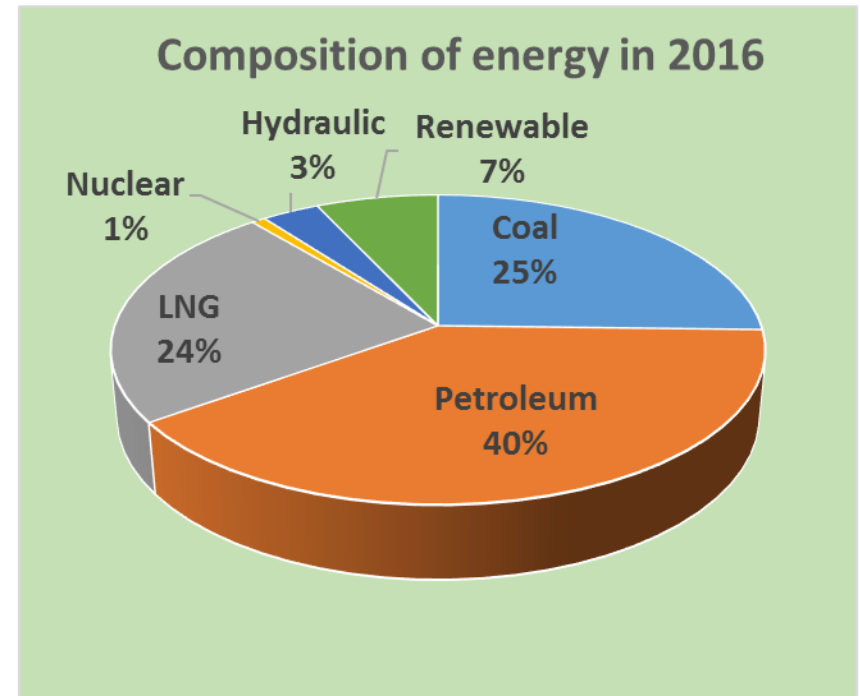


It will reduce the costs of inspections and lead great benefits for building owners and managers.

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

■ Energy in Japan

- Self-sufficiency rate in 2016 has remained only about 8% due to the suspension of nuclear power stations.
- The energy self-sufficiency rate will be set to come to 24% in 2030.



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

■ Energy-Saving Renewable Energy Sophisticated Investment Promotion Tax System

- Receive 20% tax preferential treatment as a special depreciation

if a company or an individual newly acquires renewable energy equipment, etc. and provides it for business use

< Target Facilities >

- ✓ Hydraulic Power
- ✓ Woody Biomass Power / Heat Supply Equipment
- ✓ Biomass Utilization Methane Gas Production Equipment
- ✓ Geothermal Power
- ✓ Storage Battery
- ✓ Wind Power

■ Tiling for Public Works in Japan

- Use tiles and construction method approved by the Public Building Construction Standard Specification supervised by the Ministry of Land, Infrastructure, Transport and Tourism.
- Use tiles certified by the Japanese Industrial Standard · JIS A 5209 (ceramic tile)
- The elastic adhesive installation has spread rapidly, and now about 30% of the exterior wall tile market is taken.



Q-CAT Certification mark

Quality accreditation system for
Combination of organic
Adhesive and exterior
Tile

V. Development in regulations at national level affecting ceramic tiles (notably environmental or health & safety regulation)

1) Current legislation applicable to respirable crystalline silica (RCS)

1.1 - Emissions limit in force

1.2 - Labelling requirements

-To protect dust workers, measuring and managing the concentrations of dust is stipulated in the Industrial Safety and Health Law and the Dust Prevention Regulations.

-Inhalable dust in an environment with an aerodynamic diameter of 4 microns and 50% cut as defined by ISO 7708 is measured by the working environment measurement method.

2) Current legislation affecting other raw materials (e.g. TiO₂)

Titanium Oxide (TiO₂)

-No impact on health

-Titanium oxide was also certified as a food additive in 1983, and its safety has been confirmed.



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Thank you for your attention!

