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Decorative Tile: Europe

July 2022



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About This Report

Scope

This report forecasts to 2026 decorative tile demand and production in square meters in Europe. Total demand is segmented by material in terms of:

- ceramic
- porcelain
- stone
- other materials such as metal, concrete, and glass

Total demand is also segmented by application as follows:

- interior wall cladding
- flooring
- siding (exterior wall cladding)
- countertops and backsplashes
- other applications such as fireplace surrounds and backings, and ceiling coverings

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; production and the various segments are reported at five-year intervals for 2011, 2016, and 2021.

Excluded from the scope of this report are roofing tiles, vinyl tiles, and carpet tiles; tile used in vehicles such as boats, airplanes, and motor homes; outdoor ground coverings such as bricks and pavers; natural and engineered stone slab countertops; and curtain wall and window wall.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 6 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom*
France*	Isle of Man	Norway	Vatican City

*Major decorative tile markets.

Source: The Freedonia Group

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania*
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine*
Estonia	Poland*	

*Major decorative tile markets.

Source: The Freedonia Group

Sources

Decorative Tile: Europe (FE60014) is based on *Global Decorative Tile*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | NACE Codes Related to Decorative Tile

NACE Code	Definition
23.31	Manufacture of ceramic tiles and flags
23.32	Manufacture of bricks, tiles and construction products, in baked clay

Source: European Commission

Table 9 | HS Codes Related to Decorative Tile

HS Code	Definition
681019	Cement, concrete or artificial stone; tiles, flagstones and similar, (excluding building blocks and bricks) whether or not reinforced
6901	Bricks, blocks, tiles and other ceramic goods of siliceous fossil meals (e.g., kieselguhr, tripolite or diatomite) or of similar siliceous earths
6907	Unglazed ceramic flags and paving, hearth, or wall tiles, unglazed ceramic mosaic cubes and the like, whether or not on a backing
6908	Glazed ceramic flags and paving, hearth or wall tiles; glazed ceramic mosaic cubes and the like, whether or not on a backing
7016	Glass; paving blocks, slabs, bricks, tiles etc., of pressed, moulded glass, whether or not wired, glass smallwares for decorative purposes leaded lights and the like; multicellular or foam glass

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Decorative Tile

Freedonia Industry Studies

Bricks, Blocks, & Pavers

Ceilings

Countertops

Flooring

Global Brick & Tile Siding

Global Ceiling Tiles

Global Cement

Global Decorative Laminates

Global Drywall & Building Plaster

Global Engineered Stone Countertops

Global Fiber Cement

Global Flooring

Global Hard Surface Flooring

Global Housing

Global Plumbing Products

Global Prefabricated Housing

Global Siding (Cladding)

Hard Surface Flooring

Hardscaping Products

Moulding & Trim

Outdoor Kitchens

Outdoor Living Products 2021

Precast Concrete Products

Siding

Freedonia Focus Reports

Bed & Bath Furnishings: United States

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Decorative Laminates: Europe

Fabricated Metal Products: United States

Flooring: Europe

Global Demographics
Global Macroeconomy
Housing: Europe
Manufacturing: United States
Mining & Quarrying: United States
Sheet Metal: United States
Siding: Europe

Freedonia Custom Research

Trade Publications

Ceramic World Review
Floor Covering Weekly
Floor Focus
Stone World
TILE Magazine

Agencies & Associations

ASTM International
Ceramics of Italy
Ceramic Tile Distributors Association
Coverings
Eurostat
International Monetary Fund
International Organization for Standardization
Natural Stone Institute
Organisation for Economic Co-operation and Development
Tile of Spain
United Nations Comtrade
World Bank