



Freedonia Focus Reports
Global Collection

Global Decorative Tile

July 2022



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
COVID-19 Impact	5
Demand by Material	6
Ceramic	7
Porcelain	7
Stone	8
Other Materials	9
Demand by Application	11
Flooring Tile	12
Interior Wall Cladding	13
Siding (Exterior Wall Cladding)	14
Countertops & Backsplashes	15
Other Applications	16
3. Regional Segmentation & Forecasts	18
Regional Production Overview	18
Regional Demand Overview	20
North America	22
Western Europe	24
Asia/Pacific	26
Other Regions	28
Central & South America	29
Eastern Europe	29
Africa/Mideast	29
4. Industry Structure	31
Industry Characteristics	31
Market Share	32
Mohawk Industries	33
Grupo Lamosa	33
Pamesa Group	34
5. About This Report	35
Scope	35
Sources	35
Industry Codes	36
Freedonia Methodology	37
Resources	38

List of Tables & Figures

Figure 1 Global Decorative Tile Market Outlook, 2021 – 2026	4
Figure 2 Global Decorative Tile Demand by Material, 2011 – 2026 (bil sq mtr)	6
Table 1 Global Decorative Tile Demand by Material, 2011 – 2026 (mil sq mtr)	6
Figure 3 Global Decorative Tile Demand by Material, 2011 – 2026 (%)	10
Figure 4 Global Decorative Tile Demand by Application, 2011 – 2026 (bil sq mtr)	11
Table 2 Global Decorative Tile Demand by Application, 2011 – 2026 (mil sq mtr)	11
Figure 5 Global Decorative Tile Demand by Application, 2011 – 2026 (%)	17
Figure 6 Global Decorative Tile Production by Region, 2011 – 2026 (bil sq mtr)	18
Table 3 Global Decorative Tile Production by Region, 2011 – 2026 (mil sq mtr)	18
Figure 7 Global Decorative Tile Production by Region, 2011 – 2026 (%)	19
Figure 8 Global Decorative Tile Demand by Region, 2011 – 2026 (bil sq mtr)	20
Table 4 Global Decorative Tile Demand by Region, 2011 – 2026 (mil sq mtr)	20
Figure 9 Global Decorative Tile Demand by Region, 2011 – 2026 (%)	21
Figure 10 North America: Decorative Tile Demand by Material, 2011 – 2026 (mil sq mtr)	22
Figure 11 North America: Decorative Tile Demand by Application, 2011 – 2026 (mil sq mtr)	22
Table 5 North America: Decorative Tile Demand by Material & Application, 2011 – 2026 (mil sq mtr)	23
Figure 12 Western Europe: Decorative Tile Demand by Material, 2011 – 2026 (mil sq mtr)	24
Figure 13 Western Europe: Decorative Tile Demand by Application, 2011 – 2026 (mil sq mtr)	24
Table 6 Western Europe: Decorative Tile Demand by Material & Application, 2011 – 2026 (mil sq mtr)	25
Figure 14 Asia/Pacific: Decorative Tile Demand by Material, 2011 – 2026 (bil sq mtr)	26
Figure 15 Asia/Pacific: Decorative Tile Demand by Application, 2011 – 2026 (bil sq mtr)	26
Table 7 Asia/Pacific: Decorative Tile Demand by Material & Application, 2011 – 2026 (mil sq mtr)	27
Figure 16 Other Regions: Decorative Tile Demand by Region, 2011 – 2026 (bil sq mtr)	28
Figure 17 Other Regions: Decorative Tile Demand by Material, 2011 – 2026 (bil sq mtr)	28
Table 8 Other Regions: Decorative Tile Demand by Region & Material, 2011 – 2026 (mil sq mtr)	30
Figure 18 Global Decorative Tile Market Share by Company, 2021 (%)	32
Table 9 Leading Suppliers to the Global Decorative Tile Market	33
Table 10 NAICS & SIC Codes Related to Decorative Tile	36
Table 11 HS Codes Related to Decorative Tile	36
Table 12 NACE Codes Related to Decorative Tile	36

About This Report

Scope

This report forecasts to 2026 global demand for decorative tile by material, application, and major world region in square meters. Material segments include:

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

Reported applications encompass:

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

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, material, application, and regional demand (including material and application segments) are provided for 2011, 2016, and 2021. Finally, global production is segmented by major world region and provided for 2011, 2016, 2021, and 2026.

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.

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.

Sources

Global Decorative Tile (FW60014) is based on 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 10 | NAICS & SIC Codes Related to Decorative Tile

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
327120	Clay building material and refractories manufacturing	3251	Brick and structural clay tile
327331	Concrete block and brick manufacturing	3253	Ceramic wall and floor tile
327991	Cut stone and product manufacturing	3259	Structural clay products, nec
		3281	Cut stone and stone products

Source: US Census Bureau

Table 11 | 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

Table 12 | 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

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.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

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

Mining & Quarrying: United States

Freedonia Custom Research

Trade Publications

Ceramic World Review

Floor Covering Weekly

Floor Focus

Stone World

TILE Magazine

Agencies & Associations

Ceramics of Italy

Ceramic Tile Distributors Association

China Building Ceramics and Sanitaryware Association

Coverings

Eurostat

National Association of Home Builders

Natural Stone Institute

Terrazzo, Tile and Marble Association of Canada

Tile Council of North America

Tile of Spain

United States Census Bureau

United States International Trade Commission