

# **Ceramic and Natural Stone Tiles Market Assessment, By Type [Granite, Limestone, Travertine, Onyx, Slate, Porcelain, Others], By Finish Type [Polished, Brushed, Honed and Filled, Tumbled, Flamed, Others], By Application [Interior, Exterior], By End-user [Residential, Commercial, Industrial], By Region, Opportunities and Forecast, 2016-2030F**

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## **Abstracts**

Global ceramic and natural stone tiles market size was valued at USD 411 billion in 2022, which is expected to grow to USD 630.76 billion in 2030, with a CAGR of 5.5% during the forecast period between 2023 and 2030. The shift in consumer preference from paints and metal slabs to natural stones and ceramics, coupled with an increased desire for more ornate interior designs in homes, is anticipated to drive the expansion of ceramic and natural stone tiles market. Anticipated growth in both residential and non-residential building construction activities is poised to positively impact the ceramic and natural stone tile market, supported by a favorable perspective in construction industry.

The ceramic and natural stone tiles market growth reflects the strong rise in construction activities and the surge in renovation and remodeling projects. The inherent quality of ceramic and natural stone, such as smooth and non-porous surfaces, enables easy cleaning and disinfection, thereby making it an optimal flooring where hygiene is a major requirement. Additionally, environmental consciousness is pivotal in driving ceramic and natural stone tile eco-friendly materials and sustainable choices. Government regulations, incentives, and globalization contribute to widely adopting ceramic and natural stone products across different regions. These materials' longevity, ease of maintenance, and ability to withstand moisture and bacteria make them preferred options, especially in healthcare and hygiene-critical environments.

Collectively, these drivers shape the global ceramic and natural stone market, responding to economic, cultural, and technological shifts while meeting the demands of various industries and consumers worldwide.

### The Need for Hygiene Surfaces to Amplify the Demand for Ceramic and Natural Stone Tiles

The clean surface provided by tiles is particularly advantageous in healthcare settings, where minimizing the risk of cross-contamination and infection is paramount. Inherent qualities of tiles such as smooth, non-porous surfaces facilitate easy cleaning and disinfection, creating an environment that is inhospitable to the growth of bacteria, fungi, and other microorganisms. The hygiene provided by the tiles abets the rising demand for ceramic and natural stone tiles as consumers are becoming more health conscious.

For instance, the water absorption rate of porcelain tiles is less than 0.5% and glazed ceramic tile is less than 3%. Hence, the low absorption rates of tiles benefit the consumers due to their effortless maintenance as they can be easily disinfected and are highly resistant to the effects of chemicals, acids, and alkalis, which is an important driving factor of demand for ceramic and natural tile, which, in turn, is boosting the growth of the market.

### Rise in Construction Projects to Drive the Ceramic and Natural Stone Tiles Market

The ceramic and natural stone tiles market and the construction and real estate sectors are often symbiotic. Tile demand rises when building and real estate development are increasing because more buildings are being erected or refurbished. Both residential and commercial properties rely heavily on tiles for functional and aesthetic purposes. In residential construction, tiles are used in kitchens, bathrooms, and living spaces. They are employed in hotels, offices, retail spaces, and public buildings in the commercial sector.

For instance, according to the Ministry of Statistics and Program implementation, the building materials sector in India experienced a 10% increase in 2022 when compared to the previous year and the demand for materials used in construction is on the rise in various nations, which in turn increases the demand for tiles in the infrastructure sector. Thus, the global demand increase for tiles drive the ceramic and natural stone tiles market.

### High Environmental Impact of Ceramic Production to Hamper the Market Growth

Ceramic tile production contributes to negative environmental impacts by emitting greenhouse gases such as carbon dioxide and various atmospheric pollutants. It is primarily due to the necessity of high-temperature kilns and the application of glazes in the manufacturing process. Despite advancements in energy efficiency, ceramic tile production continues to be an energy-intensive process, notably during the firing and glazing stages.

For instance, according to the European Union (EU), annually, the manufacturing of wall and floor tiles, bricks and roof tiles, and refractories in the EU releases 19 million metric tons of CO<sub>2</sub> emissions. Additionally, the estimated yearly energy usage for the firing of ceramics using natural gas is approximately 182 terawatt-hours (TWh). As a result, the high usage of energy along with high greenhouse gas emissions is likely to hamper the growth of the ceramic and natural stone tile market.

#### Asia-Pacific Dominates Ceramic and Natural Stone Tile Market

Steadily increasing construction in Asia-Pacific, in countries such as India and China, have led to a rise in demand for ceramic and natural stone tile market. APAC's need for ceramic and stone tiles has been boosted by rising awareness of their advantages, which include durability, low maintenance, and environmental friendliness. To meet the increasing demand, producers and suppliers of ceramic and stone tiles are concentrating on growing their market share in the region.

For instance, in Busan City, South Korea, a residential community with 21 apartment buildings will be built as part of the project. Beginning in Q3 2023, construction is anticipated to be completed in Q2 2026. Similarly, in Shaoxing City, Zhejiang, China's Binhai New Area, a talent housing facility is to be built as part of the project. Construction is anticipated to be finished in Q3 2026, having begun in Q3 2023. Therefore, several upcoming residential projects like these in Asian-Pacific contribute to high demand of ceramic and natural stone tile in the region.

#### Impact of COVID-19

The COVID-19 pandemic notably influenced the ceramic and natural stone tiles market in several countries due to global disruptions in supply chains, stemming from movement restrictions and workforce shortages. Restrictions caused by the pandemic led to challenges in sourcing and the availability of tiles globally. Furthermore, the end-use industries faced setbacks as construction projects experienced delays or

suspensions due to lockdowns and economic uncertainties, resulting in reduced demand.

However, a contrasting trend emerged during the heat of COVID-19 pandemic, particularly in 2020 through early 2022. This period saw a remarkable upswing in the demand for interior decorations. Homeowners significantly increased their investments in indoor tiles to improve their interior designs contributing to the growth of global ceramic and natural stone tile market.

### Impact of Russia Ukraine War

The ongoing Russia-Ukraine war had a huge impact on the ceramic and natural stone tiles market, especially in Europe. The increase in tile firing fuel prices caused by the sanctions on Russian crude oil raised the cost of tiles, impacting consumer sentiments. Furthermore, the tightening supply of Ukrainian clay used in tile making in countries such as Italy and Spain further raised the global prices of ceramic and natural stone. The reduced construction activities in the countries affected by the ongoing conflict further decreased the demand for ceramic and natural stone tiles.

### Key Players Landscape and Outlook

Key manufacturers in the ceramic and stone tile market are continually innovating by introducing new product lines that boost enhanced functionalities. These advancements include integrating anti-slip properties and anti-bacterial characteristics into their tiles. The strategic move aligns with market demands for high-performance materials that cater to safety concerns while offering added value to consumers seeking reliable and hygienic surfacing solutions. The manufacturers aim to strengthen their market position by introducing tiles with these supplementary functionalities and capture consumer interest.

For instance, in September 2023, Daltile launched six new tile and stone collections into their industry-leading product line.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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