

Ceramic Tiles Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 By Product (Glazed, Porcelain, Scratch-free and Others), By Application (Floor Tiles, Wall Tiles and Others), By Construction (New Construction and Replacement & Renovation), By End User (Residential and Non-Residential), By Region, Competition

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Abstracts

The global ceramic tiles market reached a size of USD 68.94 billion in 2022 and is projected to grow to USD 91.82 billion by 2028, with a CAGR of 5.61% from 2022 to 2028. This growth is primarily driven by increased construction activities and government investments in infrastructure development. The demand for ceramic tiles is fueled by their exceptional properties such as high durability, water resistance, crack resistance, and aesthetic appeal. The market is witnessing a surge in demand for ceramic tiles during the renovation and remodeling of residential and commercial spaces, including houses, shops, and malls. Additionally, factors such as population growth and rising disposable income are further contributing to the market's expansion.

Key Market Drivers:

Booming floor industry: Ceramic tiles are widely utilized in flooring applications due to their versatile, sturdy, and stylish characteristics. The demand for floor coverings is rising globally, driven by increased infrastructure and construction activities. The adoption of hard surface flooring, such as ceramic tiles, is growing due to its exceptional performance and cost-effectiveness. Ceramic tiles exhibit remarkable resistance against stains and water. Moreover, they are eco-friendly and highly durable. Their ability to withstand humidity and ease of maintenance significantly prolong their lifespan. With

their versatility, ceramic tiles can be employed in diverse environments for both interior and exterior applications.

Growing Construction Industry in Developing Countries to Fuel Market Demand: The growth of the construction industry in developing countries serves as a key market driver. Governments are making significant investments in infrastructure development and renovation to enhance public welfare. The construction of public recreational spaces, schools, hospitals, and public transportation systems has resulted in increased product consumption. Moreover, government expenditures to improve train stations and airports to meet premium standards have driven up demand while also enhancing the visual appeal of the infrastructure. Additionally, rapid industrialization activities and the construction of commercial buildings in developing countries will continue to drive growth throughout the forecast period.

Rising Population and Urbanization Will Boost Market Demand

The population has witnessed exponential growth in recent years. Governments across various countries are collaborating with private firms to enhance residential infrastructure and cater to the housing needs of the expanding population. The emergence of smart cities has further escalated the demand. Additionally, the increasing preference for multi-story residential buildings over private houses has resulted in higher product consumption per unit area, consequently driving the ceramic tiles market.

Reopening of Commercial Spaces to Fuel the Market Growth of Ceramic Tiles

The increasing demand for ceramic tiles from developed and developing countries, driven by their numerous benefits such as easy maintenance, affordability, and simple installation, is expected to fuel the market growth of ceramic tiles in the upcoming years. The reopening of schools, offices, restaurants, and other commercial spaces following the easing of COVID-related restrictions, coupled with the resumption of construction activities, further boosts the demand for ceramic tiles. Additionally, factors such as evolving consumer preferences, growing demand for a variety of patterns, designs, and styles, and increasing renovation activities contribute to the progression of the market. Furthermore, the porcelain segment has witnessed significant market growth in ceramic tiles worldwide, mainly due to its superior density and hardness compared to other ceramic tiles. Porcelain tiles offer exceptional durability, high resistance to wear and tear, low water absorption rate, stain resistance, and ease of cleaning, making them highly sought after in kitchens, hospitals, and bathrooms. Consequently, the demand for

porcelain tiles propels the overall market growth.

Key Market Challenges

Increasing regulations, requirements, and tariffs

Requirements in the UK and the EU are established by the norm EN 14411, which is based on the international standard ISO 13006. In the US, ANSI 137 is the relevant standard. These standards are responsible for the categorization, definition, and classification of ceramic tiles into distinct groups. Each group is assigned specific values for chemical resistance, stain resistance, dimensions, breaking strength, water absorption, surface abrasion, cracking resistance, and anti-slip properties. The norm sets the required values that the tiles must meet, as well as the test methods for each defined group. European regulations further classify ceramic tiles into various classes, prescribing the characteristics to be controlled and the tolerances for each. Some limits for certain characteristics are not explicitly defined and are subject to agreement between the manufacturer and purchaser.

Extremely competitive market

Highly competitive markets are characterized by the presence of numerous businesses offering similar products or services. The ceramic tiles market, in particular, is known for its intense competition, with both global and regional players vying for market share. One of the key challenges in this industry is determining competitive pricing strategies and finding the right price point. Operating players often face the dilemma of striking a balance between attracting customers with low prices and maintaining profitability. The difficulty lies in consistently offering prices lower than competitors, thereby gaining a competitive edge without compromising profitability.

Key Market Trends

Increase in demand from emerging economies

Rapid industrialization, along with favorable government policies in emerging countries such as China, India, and Russia, has led to an increase in foreign investments, disposable income, and a growing emphasis on interior decoration. As a result, the construction industry has experienced significant growth, driving the demand for ceramic tiles in these emerging economies. The economic growth in China is particularly stimulating the real estate market and fueling the demand for floor-covering

products. According to the International Trade Administration, China currently holds the title for the largest construction market worldwide. Similarly, in India, the construction industry continues to exhibit strong growth, supported by favorable government policies, foreign direct investment (FDI) in the construction development sector, and a growing population. These factors are expected to further propel the domestic construction sector, consequently driving the demand for ceramic tile products in this emerging economy.

Segmental Insights

End User Insights

The Residential segment is expected to dominate the market during the forecast period. The growth of this sector is driven by factors such as the rise in new constructions, housing renovation and remodeling activities, and higher disposable income levels. Ceramic tiles are widely favored in residential settings due to their durability and easy maintenance, making them the ideal choice for areas including kitchens, bathrooms, living rooms, dining spaces, and bedrooms. With a steady increase in housing renovation and maintenance, and the expectation of further growth in the coming years, driven by the rising disposable income of individuals.

Product Insights

The Porcelain segment is expected to dominate the market during the forecast period. The rising demand for porcelain tiles can be attributed to their exceptional properties, including low water absorption, slip resistance, and anti-bacterial characteristics. These qualities have made porcelain tiles immensely popular for both residential and commercial buildings. Porcelain tiles come in various types, such as glazed porcelain tiles, unglazed porcelain tiles, and full-body porcelain tiles, which are primarily used for heavy-duty flooring applications. Unglazed porcelain tiles, with their uniform color and through-body composition, tend to conceal minor chips better than ceramic tiles. The Asia Pacific region is expected to witness significant growth in this market.

Regional Insights

APAC accounted for the largest share of revenue and is projected to maintain its lead throughout the forecast period. There are multiple factors contributing to this dominant position. The region has experienced rapid urbanization and industrialization, leading to increased construction activities and infrastructure development. Consequently, there is

strong demand for ceramic tiles in the residential, commercial, and industrial sectors. The growing population and rising disposable income levels in countries such as China and India have stimulated the demand for housing and renovation projects, thus further boosting the ceramic tile market. Additionally, the presence of numerous ceramic tile manufacturers in countries like China, India, and Vietnam has established the region as a major production hub, catering to both domestic and international markets. Furthermore, favorable government initiatives, including infrastructure development projects and affordable housing schemes, have significantly contributed to the demand for ceramic tiles in the Asia-Pacific region, consolidating its position as the largest market share holder in the industry.

Key Market Players

Mohawk Industries Inc.

Siam Cement Group

Grupo Lamosa

Grupo CEDASA

RAK Ceramics PJSC

Kajaria Ceramics

Ceramica Carmelo FIOR

PAMESA

Ceramiche Atlas Concorde SPA

Grupo Fragnani

Report Scope:

In this report, the Global Ceramic Tiles Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Ceramic Tiles Market, By Product:

Glazed

Porcelain

Scratch-free

Others

Global Ceramic Tiles Market, By Application:

Floor Tiles

Wall Tiles

Others

Global Ceramic Tiles Market, By Construction:

New Construction

Replacement & Renovation

Global Ceramic Tiles Market, By End User:

Residential

Non-Residential

Global Ceramic Tiles Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Ceramic Tiles Market.

Available Customizations:

Global Ceramic Tiles Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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