

Middle East and Africa Ceramic Tiles Market By Product (Glazed Ceramic Tiles, Porcelain Tiles, Scratch-Free Ceramic Tiles), By Application (Floor Tiles, Wall Tiles, Roof Tiles, Others), By Distribution Channel (Offline Stores, Online Stores), By End-User (Residential, Commercial, Industrial), By Country, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Middle East and Africa Ceramic Tiles Market was valued at USD 19.72 Billion in 2024 and is expected to reach USD 31.28 Billion by 2030 with a CAGR of 7.83% during the forecast period.

The Middle East and Africa (MEA) Ceramic Tiles market refers to the demand, supply, and sale of portable storage devices used to store data externally across countries in the Middle East and Africa. Ceramic Tiles are widely used for personal, corporate, and government purposes to store, transfer, and secure data, offering a flexible solution that supports both cloud and offline storage needs. With rapid digitalization across these regions, especially with the expansion of e-commerce, remote work, and digital banking, the demand for secure and reliable data storage solutions is increasing. Factors like the rise in internet penetration, smartphone adoption, and the subsequent data generated are pushing businesses and individuals to seek more efficient ways to manage data, fueling market growth. Additionally, the adoption of advanced technologies like artificial intelligence, machine learning, and big data analytics requires substantial data storage capacity, which Ceramic Tiles can support efficiently.

Moreover, rising concerns around data privacy and security are prompting businesses to invest in secure storage solutions to safeguard sensitive information, further

accelerating the demand for Ceramic Tiles. Many companies in these regions prefer on-premise and hybrid storage options for better control over data security, and Ceramic Tiles offer a practical solution for secure, local backups. Additionally, the proliferation of smart cities and IoT applications is increasing data volume and driving demand for portable storage that supports high-capacity requirements. The market's growth is also supported by declining costs and improvements in storage capacities, making these devices more accessible to both individual users and enterprises. Further, collaborations between tech manufacturers and governments in Africa and the Middle East to improve digital infrastructure and enhance data security measures are projected to continue driving market expansion. As digital transformation deepens across industries like healthcare, finance, and education, the need for scalable, reliable, and flexible storage solutions like Ceramic Tiles is expected to sustain this upward market trend.

The GCC countries, particularly Saudi Arabia and the UAE, accounted for a major share of investments, with over USD 800 million allocated to new manufacturing facilities and modernization projects.

Key Market Drivers

Rising Construction Activities Fueling the Demand for Ceramic Tiles

The Middle East and Africa Ceramic Tiles Market is witnessing significant growth driven by a surge in construction activities across the region. As urbanization accelerates, governments and private investors are making substantial investments in large-scale infrastructure projects, such as residential complexes, commercial buildings, hotels, shopping malls, and transport facilities. This ongoing construction boom is particularly evident in countries like the United Arab Emirates, Saudi Arabia, Egypt, and Nigeria, where the focus on developing modern cities and expanding economic zones is a priority.

Ceramic tiles are highly favored in construction projects due to their durability, versatility, and cost-effectiveness. These tiles are renowned for their resistance to wear, moisture, and temperature variations, making them an ideal choice for flooring, walls, and facades in both interior and exterior applications. Additionally, the growing emphasis on sustainability in the construction sector is encouraging the use of ceramic tiles, as they are often made from natural materials and can be produced with minimal environmental impact. The expanding tourism sector, particularly in the Gulf Cooperation Council countries, has also fueled the demand for aesthetically appealing

ceramic tiles in the hospitality industry. As more hotels, resorts, and commercial spaces are built to attract tourists, the need for high-quality and visually appealing ceramic tile installations continues to grow.

With countries like Saudi Arabia implementing large-scale projects such as NEOM and the Red Sea Project, and the United Arab Emirates focusing on infrastructure development ahead of global events like the Expo, the construction sector remains a key driver for the ceramic tiles market. The robust pipeline of infrastructure and real estate projects across the Middle East and Africa will continue to generate substantial demand for ceramic tiles, making it a lucrative segment in the region's construction industry. As urbanization continues and disposable incomes rise, there is an increasing preference for premium ceramic tiles in high-end construction projects. The market for premium ceramic tiles in the Middle East has seen a growth of 10-12% annually.

Growing Consumer Preference for Aesthetically Pleasing and Durable Flooring Solutions

The increasing consumer preference for aesthetically pleasing, durable, and low-maintenance flooring solutions is a major driver in the Middle East and Africa Ceramic Tiles Market. As the region's middle class expands and disposable incomes rise, there is a growing inclination towards home renovations and upgrades that enhance the visual appeal and functionality of living spaces. Ceramic tiles, with their wide range of colors, patterns, textures, and finishes, are gaining popularity among consumers looking to add a touch of elegance and modernity to their interiors.

The versatility of ceramic tiles, which allows them to replicate the look of natural materials like marble, wood, and stone at a fraction of the cost, is particularly appealing in this market. These tiles offer both functionality and aesthetics, making them suitable for various applications in kitchens, bathrooms, and living rooms. Additionally, the demand for ceramic tiles is bolstered by their easy maintenance and long lifespan, which are important factors for homeowners and commercial establishments seeking cost-effective and durable flooring solutions.

Moreover, the increased awareness of health and hygiene, especially in the post-pandemic era, has led to a surge in demand for ceramic tiles, as they are resistant to allergens, bacteria, and other contaminants. This feature makes ceramic tiles a preferred option for residential, commercial, and institutional spaces where hygiene is a top priority. As a result, the market for ceramic tiles in the Middle East and Africa is experiencing steady growth, driven by consumer preferences for stylish yet practical

flooring and wall solutions. Mega infrastructure projects, such as the Expo 2020 in Dubai, and Qatar's World Cup 2022 infrastructure, have spurred demand for ceramic tiles. These events are expected to drive an additional 5-7% growth in the demand for tiles in the short term.

Technological Advancements and Innovation in Ceramic Tile Production

Technological advancements in ceramic tile manufacturing processes have been instrumental in driving the Middle East and Africa Ceramic Tiles Market. The adoption of advanced technologies such as digital printing, automated production lines, and precision cutting techniques has significantly enhanced the quality, design capabilities, and efficiency of ceramic tile production. These innovations have enabled manufacturers to offer a diverse range of ceramic tiles with intricate designs, vibrant colors, and realistic textures that mimic natural materials like stone, wood, and marble.

Digital printing technology, in particular, has revolutionized the ceramic tile industry by allowing manufacturers to produce highly customized tiles with complex patterns and designs, meeting the growing consumer demand for personalized interior solutions. Additionally, advancements in glazing techniques have improved the durability and scratch resistance of ceramic tiles, making them suitable for high-traffic areas in both residential and commercial settings.

The increased focus on sustainability has also driven innovation in ceramic tile production. Many manufacturers are now utilizing eco-friendly materials and energy-efficient processes to reduce their carbon footprint. The integration of sustainable practices aligns with the region's growing emphasis on green building standards and environmentally conscious construction. This focus on innovation not only enhances the market competitiveness of ceramic tiles but also caters to the rising consumer demand for sustainable and high-performance building materials. As technological advancements continue to transform the ceramic tile industry, they are expected to drive market growth in the Middle East and Africa. Saudi Arabia's Vision 2030, which includes large-scale urban development projects, is projected to increase the demand for ceramic tiles by 8-10% by 2030.

Key Market Challenges

Fluctuations in Raw Material Prices and Supply Chain Disruptions

One of the significant challenges impacting the Middle East and Africa Ceramic Tiles

Market is the volatility in raw material prices coupled with persistent supply chain disruptions. Ceramic tile manufacturing heavily depends on raw materials such as clay, feldspar, and silica, which are primarily sourced from global suppliers. Any fluctuations in the prices of these materials directly impact production costs, making it challenging for manufacturers to maintain competitive pricing. The reliance on imports for raw materials also exposes the market to currency exchange rate fluctuations, increasing procurement costs and squeezing profit margins.

The Middle East and Africa region have also experienced disruptions in global supply chains due to geopolitical tensions, regulatory changes, and transportation bottlenecks. For instance, the impacts of the COVID-19 pandemic and subsequent geopolitical conflicts have led to delays in shipments, port congestion, and increased freight costs. These disruptions not only affect the availability of raw materials but also hinder the timely delivery of finished ceramic tiles to end-users. Manufacturers in the region are facing increased production costs and extended lead times, which can lead to project delays, especially in the construction sector where timely material supply is critical. The lack of localized raw material production and the overreliance on imports further exacerbate the supply chain challenges, compelling manufacturers to explore alternative sourcing strategies and optimize their inventory management processes to mitigate risks.

Intense Market Competition and Price Sensitivity Among Consumers

The Middle East and Africa Ceramic Tiles Market is highly competitive, with numerous local and international manufacturers vying for market share. This intense competition has created a challenging environment where companies must constantly innovate and differentiate their products to attract consumers. However, the market is also characterized by a high degree of price sensitivity, especially in emerging economies where consumers prioritize affordability over brand loyalty. As a result, manufacturers often engage in aggressive pricing strategies to secure contracts, particularly in the construction sector, which is driven by cost constraints and budgetary limitations.

The influx of low-cost ceramic tiles from countries like China has further intensified the competition, putting pressure on regional manufacturers to reduce their prices, often at the expense of profit margins. Smaller players in the market struggle to compete with established brands that have the financial capability to absorb cost pressures and invest in advanced technologies. This competitive landscape forces manufacturers to continually invest in research and development to offer innovative designs, enhanced durability, and value-added features such as scratch resistance and eco-friendliness.

However, these investments can be costly, making it difficult for smaller players to sustain their operations without compromising on quality. The challenge of balancing cost efficiency with product innovation remains a significant hurdle for manufacturers seeking to thrive in the Middle East and Africa Ceramic Tiles Market.

Key Market Trends

Growing Demand for Digitally Printed and Customized Ceramic Tiles

A prominent trend shaping the Middle East and Africa Ceramic Tiles Market is the increasing preference for digitally printed and customized ceramic tiles. As consumers and businesses seek unique and aesthetically appealing interior and exterior designs, manufacturers are leveraging digital printing technology to produce tiles with intricate patterns, vibrant colors, and realistic textures. This technology allows for greater design flexibility, enabling manufacturers to cater to diverse customer preferences and rapidly changing design trends in the market.

Digital printing technology not only improves design versatility but also enhances production efficiency by reducing waste and energy consumption. This aligns with the growing emphasis on sustainability within the construction industry. The trend towards customization is particularly significant in high-end residential and commercial projects where clients demand distinctive finishes that reflect their brand or personal style. As the market continues to embrace digital transformation, manufacturers in the region are investing in state-of-the-art printing technologies to differentiate their product offerings and capture a larger share of the growing market for premium, customized tiles.

Increasing Adoption of Eco-Friendly and Sustainable Ceramic Tiles

Sustainability is becoming a critical focus in the Middle East and Africa Ceramic Tiles Market, driven by both regulatory pressures and consumer awareness of environmental issues. The shift towards green construction practices and sustainable building materials is influencing the demand for eco-friendly ceramic tiles that are made using energy-efficient processes and environmentally safe raw materials. As governments in the region implement stricter environmental regulations to reduce carbon footprints, manufacturers are responding by adopting sustainable practices, such as using recycled materials and non-toxic glazes.

The trend is also fueled by the rise in green building certifications, such as Leadership in Energy and Environmental Design (LEED) and Green Star, which are becoming more

prevalent in the construction of residential, commercial, and institutional projects. Builders and architects are increasingly opting for sustainable ceramic tiles to meet the criteria for these certifications. In response, manufacturers are investing in research and development to create tiles that not only meet aesthetic requirements but also align with sustainability goals. The growing focus on green construction is expected to drive further innovation in ceramic tile production, positioning eco-friendly products as a key growth segment in the market.

Rising Popularity of Large-Format Tiles in Residential and Commercial Spaces

The Middle East and Africa Ceramic Tiles Market is witnessing a significant shift towards the use of large-format tiles in both residential and commercial spaces. Large tiles, which are typically sized 60x120 cm or larger, offer a seamless, modern look that enhances the visual appeal of interiors and exteriors. The demand for these tiles is being driven by architects, interior designers, and homeowners who prioritize aesthetics, reduced grout lines, and ease of maintenance. The minimalist and luxurious feel provided by large-format tiles aligns with contemporary design preferences in the region.

The growing trend is also supported by advancements in manufacturing technology that allow for the production of thinner and more durable large-format tiles without compromising on strength or quality. These tiles are particularly popular in high-traffic areas such as malls, hotels, and corporate offices, where durability and ease of cleaning are essential. Additionally, large tiles help create the illusion of more expansive spaces, making them a preferred choice for high-end residential projects. As the market for large-format tiles continues to grow, manufacturers are focusing on expanding their product lines to include innovative designs and finishes that cater to the evolving needs of consumers in the Middle East and Africa region.

Segmental Insights

Product Insights

In the Middle East and Africa Ceramic Tiles Market, the Porcelain Tiles segment emerged as the dominant category in 2024 and is anticipated to maintain its leadership position throughout the forecast period. Porcelain tiles are increasingly favored across the region due to their superior durability, low water absorption rate, and enhanced resistance to wear and tear, making them ideal for both residential and commercial applications. These tiles are particularly well-suited for high-traffic areas, such as

shopping malls, airports, hotels, and outdoor spaces, where durability is a crucial factor. Additionally, porcelain tiles are gaining popularity because they offer a sophisticated aesthetic with a wide range of designs, colors, and finishes that can mimic natural stones like marble and granite, thus appealing to consumers who seek both functionality and visual appeal.

The growth of the porcelain tiles segment is further driven by the expanding construction and real estate sector across the Middle East and Africa. As governments in countries like Saudi Arabia, the United Arab Emirates, and Egypt continue to invest in large-scale infrastructure projects and smart city developments, the demand for high-quality and long-lasting building materials is on the rise. Porcelain tiles also benefit from their versatility in both indoor and outdoor installations, thanks to their ability to withstand extreme weather conditions, which is particularly advantageous in the region's diverse climatic conditions. Moreover, the increasing consumer preference for low-maintenance flooring solutions has contributed to the sustained demand for porcelain tiles, solidifying their dominance in the market. As a result, manufacturers are focusing on expanding their product portfolios to include innovative porcelain tile designs that meet the growing consumer demand for both durability and aesthetic versatility.

Country Insights

In the Middle East and Africa Ceramic Tiles Market, Saudi Arabia dominated the regional landscape in 2024 and is expected to maintain its leading position throughout the forecast period. The country's stronghold in the market is primarily driven by its rapidly expanding construction sector, supported by significant government investments in infrastructure development and urbanization projects. Saudi Arabia's Vision 2030 initiative, which emphasizes the diversification of the economy beyond oil, has led to the launch of numerous residential, commercial, and industrial projects, thereby fueling the demand for ceramic tiles. The growing focus on luxury real estate developments, such as the Neom City and Red Sea Project, is also driving the demand for premium quality ceramic tiles, particularly in the glazed and porcelain segments, which offer durability and aesthetic appeal.

Additionally, the rising trend of sustainable construction in Saudi Arabia is pushing builders and developers to choose ceramic tiles, which are known for their eco-friendly properties, durability, and ease of maintenance. The demand for ceramic tiles in the country is further supported by the increasing number of renovation projects in urban areas, driven by a growing middle-class population seeking modern and stylish interiors.

Saudi Arabia's favorable regulatory environment, coupled with a robust distribution network, has also enabled manufacturers and suppliers to cater to the burgeoning demand efficiently. Moreover, the country's strategic location as a trade hub in the region facilitates the import and export of raw materials and finished products, thus enhancing market accessibility. As these factors continue to align, Saudi Arabia is set to sustain its dominance in the Middle East and Africa Ceramic Tiles Market over the coming years, driven by ongoing infrastructure investments and a steady rise in construction activities.

Key Market Players

RAK Ceramics PJSC.

Saudi Ceramic Company .

Kajaria Ceramics Limited

Grupo Lamosa S.A.B. de C.V

Atlas Concorde S.p.A. Soc.

Duravit AG

Mohawk Industries, Inc

Al Anwar Ceramic Tiles Co. SAOG

Ceramica Cleopatra Group

Gerflor SAS.

Report Scope:

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

Middle East and Africa Ceramic Tiles Market, By Product:

Middle East and Africa Ceramic Tiles Market By Product (Glazed Ceramic Tiles, Porcelain Tiles, Scratch-Free Ce...

Glazed Ceramic Tiles

Porcelain Tiles

Scratch-Free Ceramic Tiles

Middle East and Africa Ceramic Tiles Market, By Application:

Floor Tiles

Wall Tiles

Roof Tiles

Others

Middle East and Africa Ceramic Tiles Market, By Distribution Channel:

Offline Stores

Online Stores

Middle East and Africa Ceramic Tiles Market, By End-User:

Residential

Commercial

Industrial

Middle East and Africa Ceramic Tiles Market, By Country:

Saudi Arabia

UAE

Kuwait

Iran

Qatar

Egypt

South Africa

Bahrain

Nigeria

Turkey

Rest of Middle East and Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East and Africa Ceramic Tiles Market.

Available Customizations:

Middle East and Africa Ceramic Tiles Market report with the given market data, TechSci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. MIDDLE EAST AND AFRICA CERAMIC TILES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Glazed Ceramic Tiles, Porcelain Tiles, Scratch-Free Ceramic Tiles)
 - 5.2.2. By Application (Floor Tiles, Wall Tiles, Roof Tiles, Others)
 - 5.2.3. By Distribution Channel (Offline Stores, Online Stores)
 - 5.2.4. By End-User (Residential, Commercial, Industrial)
 - 5.2.5. By Country (Saudi Arabia, UAE, Kuwait, Iran, Qatar, Egypt, South Africa, Bahrain, Nigeria, Turkey, Rest of Middle East and Africa)
- 5.3. By Company (2024)
- 5.4. Market Map

6. SAUDI ARABIA CERAMIC TILES MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Application

6.2.3. By Distribution Channel

6.2.4. By End-User

7. UAE CERAMIC TILES MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Application

7.2.3. By Distribution Channel

7.2.4. By End-User

8. KUWAIT CERAMIC TILES MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Application

8.2.3. By Distribution Channel

8.2.4. By End-User

9. IRAN CERAMIC TILES MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product

9.2.2. By Application

9.2.3. By Distribution Channel

9.2.4. By End-User

10. QATAR CERAMIC TILES MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Application

10.2.3. By Distribution Channel

10.2.4. By End-User

11. EGYPT CERAMIC TILES MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Product

11.2.2. By Application

11.2.3. By Distribution Channel

11.2.4. By End-User

12. SOUTH AFRICA CERAMIC TILES MARKET OUTLOOK

12.1. Market Size & Forecast

12.1.1. By Value

12.2. Market Share & Forecast

12.2.1. By Product

12.2.2. By Application

12.2.3. By Distribution Channel

12.2.4. By End-User

13. BAHRAIN CERAMIC TILES MARKET OUTLOOK

13.1. Market Size & Forecast

13.1.1. By Value

13.2. Market Share & Forecast

13.2.1. By Product

13.2.2. By Application

13.2.3. By Distribution Channel

13.2.4. By End-User

14. NIGERIA CERAMIC TILES MARKET OUTLOOK

14.1. Market Size & Forecast

14.1.1. By Value

14.2. Market Share & Forecast

14.2.1. By Product

14.2.2. By Application

14.2.3. By Distribution Channel

14.2.4. By End-User

15. TURKEY CERAMIC TILES MARKET OUTLOOK

15.1. Market Size & Forecast

15.1.1. By Value

15.2. Market Share & Forecast

15.2.1. By Product

15.2.2. By Application

15.2.3. By Distribution Channel

15.2.4. By End-User

16. MARKET DYNAMICS

16.1. Drivers

16.2. Challenges

17. MARKET TRENDS AND DEVELOPMENTS

18. MIDDLE EAST AND AFRICA ECONOMIC PROFILE

19. COMPANY PROFILES

19.1. RAK Ceramics PJSC.

19.1.1. Business Overview

19.1.2. Key Revenue and Financials

19.1.3. Recent Developments

19.1.4. Key Personnel

19.1.5. Key Product/Services Offered

19.2. Saudi Ceramic Company .

19.2.1. Business Overview

- 19.2.2. Key Revenue and Financials
- 19.2.3. Recent Developments
- 19.2.4. Key Personnel
- 19.2.5. Key Product/Services Offered
- 19.3. Kajaria Ceramics Limited
 - 19.3.1. Business Overview
 - 19.3.2. Key Revenue and Financials
 - 19.3.3. Recent Developments
 - 19.3.4. Key Personnel
 - 19.3.5. Key Product/Services Offered
- 19.4. Grupo Lamosa S.A.B. de C.V.
 - 19.4.1. Business Overview
 - 19.4.2. Key Revenue and Financials
 - 19.4.3. Recent Developments
 - 19.4.4. Key Personnel
 - 19.4.5. Key Product/Services Offered
- 19.5. Atlas Concorde S.p.A. Soc.
 - 19.5.1. Business Overview
 - 19.5.2. Key Revenue and Financials
 - 19.5.3. Recent Developments
 - 19.5.4. Key Personnel
 - 19.5.5. Key Product/Services Offered
- 19.6. Duravit AG.
 - 19.6.1. Business Overview
 - 19.6.2. Key Revenue and Financials
 - 19.6.3. Recent Developments
 - 19.6.4. Key Personnel
 - 19.6.5. Key Product/Services Offered
- 19.7. Mohawk Industries, Inc
 - 19.7.1. Business Overview
 - 19.7.2. Key Revenue and Financials
 - 19.7.3. Recent Developments
 - 19.7.4. Key Personnel
 - 19.7.5. Key Product/Services Offered
- 19.8. Al Anwar Ceramic Tiles Co. SAOG
 - 19.8.1. Business Overview
 - 19.8.2. Key Revenue and Financials
 - 19.8.3. Recent Developments
 - 19.8.4. Key Personnel

19.8.5. Key Product/Services Offered

19.9. Ceramica Cleopatra Group

19.9.1. Business Overview

19.9.2. Key Revenue and Financials

19.9.3. Recent Developments

19.9.4. Key Personnel

19.9.5. Key Product/Services Offered

19.10. Gerflor SAS.

19.10.1. Business Overview

19.10.2. Key Revenue and Financials

19.10.3. Recent Developments

19.10.4. Key Personnel

19.10.5. Key Product/Services Offered

20. STRATEGIC RECOMMENDATIONS

21. ABOUT US & DISCLAIMER

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