

Vietnam Building Materials Comprehensive Report

Q2/2018

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Abstracts

VIETNAM BUILDING MATERIALS INDUSTRY

Currently, 88% of baked clay bricks volume are produced in Asian countries, mainly in China, India and Bangladesh. Rapid urbanization with an average rate of around 6% per year accelerate the demand for construction brick. In Europe and developed countries in Asia, since the 1960s and 70s of the last century, the industry of non-baked materials has grown and that nearly completely replacing the baked clay bricks so far.

For ceramic tiles, production and consumption in the world have continuously grown over the years in the period from 2011 – 2016. In particular, China, Brazil and India are the leading countries in global ceramic tiles production and consumption in 2016. Vietnam ranks the fifth in the list of top producing countries and fourth in the top countries showing that Vietnam ceramic tile industry has relatively developed in the world.

Vietnam's paving brick, tile and stone industry currently accounts for a relatively low share of the construction material sector and is quite regional in character. The output of clay and kaolin exploited in Q1/2018 was estimated at x,xxx thousand tons, decreasing by 10.5% compared to the same period in 2017. The output of natural quarry exploited in Q1/2018 was estimated at x,xxx million m³, increasing by 12.3% over the same period in 2017.

In Q1/2018, the production of clay bricks was estimated at x,xxx million units, decreased slightly by 6% over the same period in 2017. The production of baked tile production in the first quarter of 2018 was estimated at xx,xx million units, decreasing by 7.6% over the same period in 2017. The output of unbaked brick production in Q1/2018 reached x.xx million. According to data of Ministry of Construction, the output of ceramic tiles in

the first quarter of 2018 reached xxx million m², including ceramic, granite and cotto tiles.

Consumption of clay bricks in Q1/2018 was estimated at x,xxx million, equal to 85% of production and not much change over the same period in 2017. Meanwhile, the consumption of baked tiles was about 80 million, down 24% over the same period in 2017. Consumption of ceramic tiles in Q1/2018 was estimated to reach xxx.x million m², the consumption/production ratio decreasing and reaching about 80% in Q1/2018 showed an oversupply situation, therefore, ceramic tile prices continue to trend downward in 2018. Brick and tile exports in Q1/2018 were estimated at USD xx.xx million, a slight increase of 10.6% over the same period of 2017. Export turnover of stone tiles in Q1/2018 was estimated at USD x.xx million, up 4.8% over the same period of 2017. However, the export turnover of Vietnam is still very low compared to the production capacity due to low quality of stone in the country.

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