

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The underlying market conditions are now strongly favourable for ceramic tiles, but substitute materials continue to offset some growth."

— Terry Leggett, Senior B2B Analyst

This report looks at the following areas:

- · What are the colour, shape and texture trends in ceramic tiles?
- · What are the driving forces for market change?
- What impact are competing materials, such as splash boards and laminates, having on the market?
- · How do consumers perceive ceramic tiles and what are their expectations for future use?
- Is the UK changing its use of ceramic tiles?

All forecasts made in this report are at 2014 prices.

The ceramic tile industry makes a wide range of products for covering floors and walls with applications in private, public and industrial buildings. The tiles can be produced in a variety of shapes and sizes, and can incorporate different patterns.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

Figure 1: The UK ceramic tiles market, 2010-14 actual and 2015-19 forecast

Figure 2: Segmentation of the UK ceramic tiles market, by type of tile, 2010-14 actual and 2015-19 forecast

Figure 3: Distribution of glazed ceramic wall tile sales, 2014

Market factors

Figure 4: The UK house building market, 2010-14 actual and 2015-19 forecast

Figure 5: The UK house repair & maintenance market, 2010-14 actual and 2015-19 forecast

Companies

Figure 6: Analysis of the changes in the structure of the ceramic tiles and flags industry, 2010-14

What we think

Key Insights

Are there any signs of a greater similarity in use between the UK and mainland Europe?

What are the major threats to the market?

What are the fashion trends of 2015?

What are consumers saying about their potential use of ceramic tiles?

Introduction

Definitions

Methodology

Abbreviations

Market positioning

UK Economy

Overview

Figure 7: UK GDP quarterly development, 2003-15

Figure 8: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

Consumer spending

Manufacturing

Business investment

Figure 9: UK GFCF 2003-15

Imports

Exports

Market Factors

Figure 10: UK households, 1996-2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Government predictions of the number of households in the UK, 2018-33

Market Size and Trends

Key points

Market size

Figure 12: The UK ceramic tiles market, 2010-14

Market trends

Formats

Colours

Wood and metal effect

Texture

Patchwork

Figure 13: Residential property transactions in the UK, 2010-14

Seasonality of sales

Figure 14: Seasonality of public housing output, 2010-14

Figure 15: Seasonality of private housing output, 2010-14

Figure 16: Seasonality of public housing repair & maintenance output, 2010-14

Figure 17: Seasonality of private housing repair & maintenance output, 2010-14

Regional sales

Figure 18: Regional public housing construction output, 2010-14

Figure 19: Regional private housing construction output, 2010-14

Figure 20: Regional housing repair & maintenance output, 2010-14

Market Segmentation

Key points

Market segmentation

Glazed tiles

Figure 21: The UK glazed tile market, 2010-14

Figure 22: Segmentation of the UK ceramic tiles market, by type of tile, 2010-14

Figure 23: Analysis of the average price of glazed ceramic tiles by source, 2010-14

Figure 24: Analysis of glazed ceramic wall tile sales, 2010-14

Figure 25: Analysis of glazed ceramic floor tile sales, 2010-14

Unglazed tiles

Figure 26: The UK unglazed ceramic tile market, 2010-14

Figure 27: Analysis of the average price of unglazed ceramic tiles, by source, 2010-14

Supply Sources

Key points

Production

Overview

Figure 28: Production of ceramic tiles in the UK, 2009-13

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAII: reports@mintel.com



Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Glazed tiles

Figure 29: Production of glazed ceramic tiles in the UK, 2009-13

Unglazed tiles

Figure 30: Production of unglazed ceramic tiles in the UK, 2009-13

Imports

Overview

Figure 31: Imports of ceramic tiles in the UK, 2009-13

Glazed tiles

Figure 32: Imports of glazed ceramic tiles in the UK, 2009-13

Unglazed tiles

Figure 33: Imports of unglazed ceramic tiles in the UK, 2009-13

Exports

Overview

Figure 34: Exports of ceramic tiles from the UK, 2009-13

Glazed tiles

Figure 35: Exports of glazed ceramic tiles from the UK, 2009-13

Unglazed tiles

Figure 36: Exports of unglazed ceramic tiles from the UK, 2009-13

Trade deficit

Overview

Glazed tiles

Unglazed tiles

Distribution

Key points

Introduction

Sector structure

Figure 37: Distribution of glazed ceramic wall tile sales, 2014

Industry Structure

Key points

Industry development

Figure 38: Analysis of the changes in the structure of the ceramic tiles and flags industry, 2010-14

Structure by employment

Figure 39: Analysis of the employment structure of the ceramic tiles and flags industry, 2013-14

Structure by turnover

Figure 40: Analysis of the financial structure of the ceramic tiles and flags industry, 2013-14

Company Profiles

British Ceramic Tile (BCT)

Figure 41: Financial analysis of British Ceramic Tile, 2009-13

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAIL: reports@mintel.com



Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

Capitol Tile Supplies

Figure 42: Financial analysis of Capitol Tile Supplies, 2010-14

Company strategy

Johnson Tiles

Figure 43: Financial analysis of Norcros Group (Holdings), 2010-14

Company strategy

Pilkington's Tiles/Pilkington's

Company strategy

TileCo Group (2007)

Figure 44: Financial analysis of TileCo Group (2007), 2009-13

Company strategy

Topps Tiles

Figure 45: Financial analysis of Topps Tiles, 2010-14

Company strategy

Demand Structure

Key points

Contract

- Figure 46: Analysis of private housing construction output in Great Britain, 2010-14
- Figure 47: Private new housing starts and completions in England, 2010-14
- Figure 48: Analysis of new public housing construction output in Great Britain, 2010-14
- Figure 49: Public housing starts and completions in England, 2010-14
- Figure 50: Trends in the gross supply of affordable housing in England, by tenure 2010-14
- Figure 51: The UK bathroom equipment market, 2010-14
- Figure 52: The UK fitted kitchen furniture market, 2010-14
- Figure 53: Long term trend in private commercial construction output in Great Britain, 1970-2014
- Figure 54: Analysis of private commercial construction in Great Britain, by type, 2010-14

DIY

Figure 55: DIY retail sales in the UK, 2010-14

The Consumer

Key points

Past behaviour

- Figure 56: Which materials have you used on walls in kitchens, bathrooms and other rooms in the past five years
- Figure 57: Which materials have you used on floors in kitchens, bathrooms and other rooms in the past five years
- Figure 58: Use of ceramic tiles on floors, by use of ceramic tiles on walls in the past 5 years, April 2015

Bathroom plans

Figure 59: Which flooring materials would you expect to use if refurbishing your main bathroom?

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAIL: reports@mintel.com



Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Which wall materials would you expect to use if refurbishing your main bathroom?

Figure 61: Anticipated use of ceramic tiles on floors, by anticipated use of ceramic tiles on walls in main bathrooms, April 2015

Kitchen plans

Figure 62: Which flooring materials would you expect to use if refurbishing your kitchen?

Figure 63: Which wall materials would you expect to use if refurbishing your kitchen?

Figure 64: Anticipated use of ceramic tiles on floors, by anticipated use of ceramic tiles on walls in kitchens, April 2015

Consumer opinions on ceramic tiles

Figure 65: Consumer attitudes to ceramic tiles

Forecast

Key points

The market

Figure 66: The UK ceramic tiles market, 2015-19 forecast

Overview

Figure 67: Forecast private housing output in Great Britain, 2015-19

Figure 68: Forecast public housing output in Great Britain, 2015-19

Figure 69: Forecast private commercial construction output in Great Britain, 2015-19

Figure 70: Forecast of private commercial construction in Great Britain, by sector, 2015-19

Segmentation

Figure 71: Forecast segmentation of the UK market for ceramic tiles, by type of tile, 2015-19

Figure 72: Forecast segmentation of the UK market for glazed ceramic tiles, by wall and floor applications, 2015-19

Figure 73: Forecast segmentation of the UK market for ceramic tiles, by distribution route, 2015-19

Further Sources & Contacts

Trade associations

The Tile Association

Trade magazines

Bathroom Journal

Bathroom & Kitchen Update

The Designer

Kitchen, Bedroom & Bathroom Review

Local Government News

Tile & Stone Journal

Tile UK

Trade exhibitions

BBC Good Homes Live

Interiors Birmingham

EXPOTILE

INTERBUILD

KBB



VISIT: store.mintel.com

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com