

Ceramic Tiles - UK - 2021

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This report looks at the following areas:

- The extreme impact of COVID-19 on the market in 2020, but the even stronger growth in 2021.
- How the different uses of tiles will impact demand up to 2026.
- How the decision-making influences in the replacement residential market are so fragmented and how retailers are adapting their policies accordingly.
- How the highly fragmented sector serving the commercial market is changing.
- How the all-important import sources are changing and why the UK industry is so confined.
- How ecommerce and digital media are gaining importance but remain complementary to bricks-and-mortar outlets.

Imports represent some 90% of the market and they fell by 52% in Q2 2020 as COVID-19 disrupted both supply and demand. However, conditions in the important housing improvement market were strongly influenced by government measures to stimulate the wider economy and the market growth in H2 2020 restricted the overall market decline to a still significant 13%.

Those favourable conditions have continued into H1 2021, and strong growth is evident, yet the conditions will moderate as issues like the Stamp Duty holiday are phased out. The growth in 2021 is far in excess of GDP, but the market will then plateau as consumers are now offered more opportunities for their discretionary spend.

The commercial market, representing some 45% of the total, faces a more mixed set of circumstances. Residential new build will continue to be buoyant but there are now issues of over-capacity in the retail and office sectors. The government and local authorities remain resistant to the repurposing of such properties to residential use, despite the long-established housing shortage. The hospitality sector also faces medium-term difficulties having been subject



“The ceramic tiles sector was severely disrupted by COVID-19 in Q2 2020. Against this some of the measures imposed to stimulate the wider economy created very strong conditions and H2 2020 and H1 2021 witnessed a major upturn in demand in the important residential RMI sector.”

– Terry Leggett, Senior B2B Analyst

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to such a long period of closure, impacting refurbishment programmes in important markets such as hotels.

In the longer term the continued en-suite/more bathrooms per property trend continues, and the importance of kitchens is being accentuated by open-plan designs. Products to extend use include porcelain tile kitchen flooring seamlessly integrating with patio areas and the open-plan designs could open the opportunity to increase residential flooring use, more in line with other European countries.

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