



**Ceramic Tile Market  
*Research & Analysis*  
*UK 2011***

**Report Sample**

**Ceramic Tile Market Size & Industry Review 2004-2010; SWOT & PEST Analysis,  
Product Mix & Key Trends 2004-2014; Ceramic Tile Retailers' & Manufacturers  
Profiles & Key Financials; Market Forecasts to 2014**

**1st Edition**

**March 2011**

# Research & Analysis Report Contents

1.	<b>INTRODUCTION TO RESEARCH &amp; ANALYSIS REPORTS</b>	7
1.1	KEY FEATURES & BENEFITS OF THIS RESEARCH & ANALYSIS REPORT	7
2.	<b>UK CERAMIC TILE &amp; CERAMIC TILE MARKET</b>	9
2.1	EXECUTIVE SUMMARY & MARKET OVERVIEW	9
2.2	CERAMIC TILE MARKET SIZE & TRENDS 2004-2014	11
2.2.1	TOTAL UK CERAMIC TILE MARKET 2004-2014	11
2.2.2	CERAMIC TILE MARKET SIZE 2004-2014 – CONSTANT PRICES	13
2.2.3	FUTURE PROSPECTS	14
2.3	KEY MARKET TRENDS IN THE CERAMIC TILE MARKET	16
2.3.1	PEST ANALYSIS – ILLUSTRATION OF KEY MARKET FORCES	16
2.3.2	POLITICAL & LEGAL INFLUENCES & TRENDS	17
2.3.3	ECONOMIC INFLUENCES & TRENDS	19
2.4	SWOT ANALYSIS – STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS	24
3.	<b>CERAMIC TILE TRENDS &amp; SHARES</b>	26
3.1	SHARE BY GLAZED AND UNGLAZED TILES – 2010, 2004 AND 2014	26
3.1.1	GLAZED TILE MARKET– 2010, 2004 & 2014	28
3.1.2	UNGLAZED TILE MARKET– 2010, 2004 & 2014	30
3.2	SHARE BY PORCELAIN AND CERAMIC TILES– 2010, 2004 & 2014	31
3.2.1	CERAMIC TILE MARKET– 2010, 2004 & 2014	33
3.2.2	PORCELAIN TILE MARKET– 2010, 2004 & 2014	35
3.3	SHARE BY WALL AND FLOOR TILES– 2010, 2004 & 2014	36
3.3.1	WALL TILE MARKET– 2010, 2004 & 2014	38
3.3.2	FLOOR TILE MARKET– 2010, 2004 & 2014	39
3.4	IMPORTS / EXPORTS	40
4.	<b>CERAMIC TILE PRODUCT MANUFACTURER PROFILES</b>	44
4.1	CERAMIC TILE MANUFACTURERS PROFILES & KPIS	44
5.	<b>CERAMIC TILE DISTRIBUTION SHARES &amp; TRENDS 2004-2014</b>	54
5.1	SHARE BY KEY DISTRIBUTION CHANNEL 2010, 2004 & 2014	54
5.2	CERAMIC TILE RETAILERS MARKET – INDUSTRY STRUCTURE	57
5.2.1	MARKET MIX BY GROWTH/DECLINE OVER LAST 12 MONTHS	57
5.2.2	INDUSTRY SHARE BY CREDIT RATING IN 2010	57
5.2.3	INDUSTRY MIX BY AGE OF COMPANIES IN 2010	59
5.2.4	INDUSTRY SHARE BY NUMBER OF EMPLOYEES IN 2010	60
5.2.5	INDUSTRY MIX BY TURNOVER BAND IN 2010	60
5.2.6	INDUSTRY MIX BY GEOGRAPHICAL REGION IN 2010	62
5.3	KEY MARKET TRENDS IN THE CERAMIC TILE RETAILERS INDUSTRY 2004-2014	63
5.3.1	CERAMIC TILE RETAILERS MARKET PROFITABILITY 2004-2014	63
5.3.2	CERAMIC TILE RETAIL INDUSTRY ASSETS 2004-2014	63
5.3.3	CERAMIC TILE RETAILERS INDUSTRY DEBT 2004-2014	66
5.3.4	CERAMIC TILE RETAILERS MARKET NET WORTH 2004-2014	67
5.3.5	SALES PER EMPLOYEE IN CERAMIC TILE RETAILERS MARKET 2004-2014	69
5.4	CERAMIC TILE RETAILERS 1 PAGE PROFILES & 4 YEAR FINANCIAL INDICATORS	70
5.5	SPECIALIST CERAMIC TILE RETAILERS RANKING & TURNOVER ESTIMATES	137
5.5.1	CERAMIC TILE RETAILERS LISTING	137
5.5.2	CERAMIC TILE RETAILERS RANKING BY TURNOVER	139
5.5.3	CERAMIC TILE & ACCESSORIES RETAILER TURNOVER ESTIMATES 2009	140
5.5.4	CERAMIC TILE & ACCESSORIES RANKING BY PROFITABILITY	141
5.5.5	CERAMIC TILE RETAILERS RANKING BY ASSETS	142
5.5.6	CERAMIC TILE RETAILERS RANKING BY DEBT	143
5.5.7	CERAMIC TILE RETAILERS RANKING BY NET WORTH	144

## Market Report Tables & Charts

- Figure 1: Total Ceramic Tile Market – UK 2004 - 2014 By Value £mn
- Figure 2: Ceramic Tile Market – UK 2004 - 2014 Constant Prices £M
- Figure 3: PEST Analysis for UK Ceramic Tile Retailers
- Figure 4: UK Economic Annual Performance– GDP 2004-2014
- Figure 5: UK Economic Annual Performance– Inflation (CPI) 2004-2014
- Figure 6: UK Economic Annual Performance– Interest Rates (Bank of England) 2004-2014
- Figure 7: UK Unemployment Numbers 2004-2014
- Figure 8: Key Strengths & Weaknesses in the Ceramic Market 2010-2014
- Figure 9: Key Opportunities & Threats in the Ceramic Tile Market 2010-2013
- Figure 10: Share of Ceramic Tile Market 2010 by Glazed / Un Glazed Tiles
- Figure 11: Share of Ceramic Tile Market 2004 by Glazed / Un Glazed Tiles
- Figure 12: Share of Ceramic Tile Market 2014 by Glazed / Un Glazed Tiles
- Figure 13: Glazed Ceramic Tile Market by Value 2004-2014 £M
- Figure 14: Unglazed Ceramic Tile Market by Value 2004-2014 £M
- Figure 15: Share of Ceramic Tile Market 2010 by Porcelain/Ceramic Tiles
- Figure 16: Share of Ceramic Tile Market 2004 by Porcelain/Ceramic Tiles
- Figure 17: Share of Ceramic Tile Market 2014 by Porcelain/Ceramic Tiles
- Figure 18: Ceramic Tile Market by Value 2004-2014 £M
- Figure 19: Porcelain Tile Market by Value 2004-2014 £M
- Figure 20: Share of Ceramic Tile Market 2010 by Wall/Floor Tiles
- Figure 21: Share of Ceramic Tile Market 2004 by Wall/Floor Tiles
- Figure 22: Share of Ceramic Tile Market 2014 by Wall/Floor Tiles
- Figure 23: Ceramic Wall Tile Market by Value 2004-2014 £M
- Figure 24: Floor Tile Market by Value 2004-2014 £M
- Figure 25: Imports Market by Value 2004-2014 £M
- Figure 26: Exports Market by Value 2004-2014 £M
- Figure 38: Ceramic Tile Market 2010 Share by Key Distribution Channels
- Figure 39: Ceramic Tile Market 2004 Share by Key Distribution Channels
- Figure 40: Ceramic Tile Market 2014 Share by Key Distribution Channels
- Figure 41: Market Share by Ceramic Tile Retailers Sales Growth / Decline 2010
- Figure 42: Market Share by Credit Rating in the Ceramic Tile Retail Industry 2010
- Figure 43: Market Share by Company Age in the Ceramic Tile Retail Market 2010
- Figure 44: Mix by Number of Employees in the Ceramic Tile Retailers Market 2010
- Figure 45: Share by Turnover Band in the Ceramic Tile Retailers Market 2010
- Figure 46: Mix by Location Type in the Ceramic Tile Retail Market 2010
- Figure 47: Ceramic Tile Retailers Market Profitability 2004 – 2014 £M
- Figure 48: Ceramic Tile Retailers Assets 2004 – 2014 £M
- Figure 49: Ceramic Tile Retailers Average Assets 2004 – 2014 £M
- Figure 50: Ceramic Tile Retailers Market Debt – UK 2004 – 2014 £M
- Figure 51: Ceramic Tile Retailers Market Average Debt 2004 - 2014 £M
- Figure 52: Ceramic Tile Retailers Market Net Worth – UK 2004 – 2014 £M
- Figure 53: Ceramic Tile Retailers Average Net Worth – UK 2004 – 2014 £M
- Figure 54: Ceramic Tile Retailers Sales Per Employee 2004 – 2014 £
- Figure 122: Ceramic Tile Retailers Company Listing
- Figure 123: Ceramic Tile Retailers Ranked By Turnover 2009
- Figure 124: Ceramic Tile Retailers Sales Estimates 2009 £M
- Figure 125: Ceramic Tile Retailers Ranked By Profit 2009
- Figure 126: Ceramic Tile Retailers Ranked By Assets 2009
- Figure 127: Ceramic Tile Retailers Ranked By Debt 2009
- Figure 128: Ceramic Tile Retailers Ranked By Net Worth 2009

This report reflects MTW Research's independent view of the market, which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

#### **Terms & Conditions of Use**

The information contained within this report remains the copyright of MTW Research. Subject to these Terms and Conditions (this "Agreement"), MTW Research ("we", "our", "us") makes available this publication and data or information contained therein (the "Report"). Your use of this report constitutes your acknowledgment and assent to be bound by this Agreement.

#### **Permitted Use, Limitations on Use**

You may access purchased Reports only as required to view the Reports for your individual use, and may print/copy a purchased Report once for your use. You may copy extracts from purchased Reports onto your own documents, provided that all citations are attributed to "MTW Research", and are for internal use only. You may not republish, resell or redistribute any Report, or do anything else with any Report, which is not specifically permitted in this Agreement. You may not reproduce, store in a retrieval system or transmit by any means, electronic or mechanical, any report without the prior permission of MTW Research.

#### **Limitation of Liability**

You are entirely liable for activities conducted by you or anyone else in connection with your use of the Report. We take no responsibility for any incorrect information supplied to us during the research process. Market information is based on telephone interviews and secondary sources whose accuracy we cannot guarantee. You acknowledge when ordering that MTW Research Reports are for your internal use and not for general publication or disclosure to third parties, unless otherwise agreed. Neither MTW Research nor any of its affiliates, owners, employees or other representatives will be liable for damages arising out of or in connection with the use of the Report or the information, content, materials or products included in the Report. This is a comprehensive limitation of liability that applies to all damages of any kind, including (without limitation) compensatory, direct, indirect or consequential damages, loss of data, income or profit, loss of or damage to property and claims of third parties.

#### **Applicable Law**

This Agreement will be governed by and construed in accordance with the laws of England and Wales without giving effect to the principles of conflict of laws thereof, and to the extent permitted by applicable law, you consent to the jurisdiction of courts situated in England and Wales in any action arising under this agreement.

#### **Intellectual Property Rights**

You acknowledge that legal and beneficial interest in Intellectual Property Rights in connection with the Report belong to us. This includes all Intellectual Property Rights in any Material. You have no rights in or to the Report and you may not use any Material other than as permitted under this Agreement. We grant you a non-exclusive, non-transferable licence to use the Intellectual Property Rights referred to above solely for the use of Material as permitted under this agreement.

#### **Companies Included**

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

#### **Estimates Provided**

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

# 1. Introduction to *Research & Analysis* Reports

## 1.1 Key Features & Benefits of this Research & Analysis Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also be used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes: -

### **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

### **Product Mix – Past, Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

### **Distribution Channel Sales – Past, Current & Future**

The report identifies the key distribution channels that drive demand for this market and provides a current, historical & future market share estimate. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

### **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to

identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

### **Company Profiles & Sales Leads – Retailers & Manufacturers**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

### **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

## 2. UK CERAMIC TILE & CERAMIC TILE MARKET

### 2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

This report reviews the total UK Ceramic Tile market and further examines Ceramic Tile sales between 2004 and 2010 with forecasts to 2014. The report also provides top line market size & product mix in 2010 for the key sectors within the overall UK Ceramic Tile industry, including: -

- Glazed / Unglazed
- Porcelain / Ceramic
- Wall / Floor

The above definitions exclude installation and accessories such as grout, adhesives. All prices in this report are measured at manufacturers selling prices excluding any value added tax, other taxes and delivery charges.

The methodology for this report is comprehensively wide ranging and encompasses both qualitative input and quantitative sales statistics. Sources for this report include primary financial data & secondary comment & input from manufacturers, retailers, distributors, UK Government, HM Customs, credit checking companies, Companies House, numerous trade journals & publications & our own experience of researching this market for more than a decade. This report is unique in its combination of both quantitative sales data combined with qualitative research comment & analysis and provides the reader with a high level of confidence in its findings.

The total UK Ceramic Tile market is estimated to have grown from a value of around XXXX million in 2004 to XXXX million by year-end December 2010, reflecting overall growth of some XXXX% over a 6 year period.

The UK Ceramic Tile market was particularly affected by XXXXXXXXXXXX  
XX  
XXXXXXXXXXXXXXXX resulting an estimated XXX% xxxxx on the 2008 market value.

Our estimates are that the recession may have cost the Ceramic Tile industry in the region of XXX of lost sales, reflecting a cost of around XXXX million per month to the industry since XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX. The level of business failures in both the manufacturing and distribution sectors of the Ceramic Tile market XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX, XXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXXXXXX XXXXXXX XX XXXXXXXXXXXXXXXXXXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXXXXXXXXXX

Indications now suggest that the majority of sectors in the market  
XX  
XX consumer and business confidence return. In terms of macroeconomic issues, the economy should XXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXX This, coupled with an improvement XXXXXXX

XXXXXXXXXXXXXXXX XXXX, should underpin XXXX XXXXXXXX XXXXXXXX XXXXXXXX Ceramic Tile market in the near term.

Near term prospects for the Ceramic Tile industry are for XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX by value. This is likely to reflect XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX as CPI (consumer price inflation) is expected to remain well above the current target XXXXXXXXXXXXXXXX.

An accelerated pattern of growth XXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXXX with the market reaching a value of XXXXXXXX XXXXXXXX by 2014, reflecting an anticipated growth rate of around XXXXXXXXXXXX between 2011 and 2014. Whilst inflation XX XXXXXXXX this growth, our forecasts are for the industry to XXXX XXXXXXXX XXXX Xreaching a value of some XXXX million by the end of 2014.

The UK ceramic tile market remains dominated by XXXXXXXX XXXXXXXXXXXX which are estimated to have accounted for XX XXXX of the total UK Ceramic Tile market in 2010, reflecting a value of around XXXX XXXX with consumers spending around XXXXXXXX per week in 2010.

Tile Retailers have experienced a XX XXXXXXXXXXXX from XXXX in 2004 to a current estimate of XXX with a value of XXX in the UK. Builders and Plumbers Merchants have also experienced XXXXXXXX XXXX from XXX in 2004 to XXXX in 2010, with an estimated current value of around XXXX million. Both sectors have experienced XXXXXXXXXXXXXXXX since 2004 due to XXXXXXXX as well as the emergence and increasing popularity XXXXXXXXXXXX

Imports of Ceramic Tiles account for over XXXX XX XXXXXXXX of the market. In recent years there has been a gradual switch away from traditional sources such XXXXXXXXXXXX in favour of countries outside the EU - XXXXXXXXXXXX Imports are likely to XXXXXXXXXXXXXXXX into the UK market resulting in XXXXXXXX XXXX XX for UK based manufacturers.



## 2.2 CERAMIC TILE MARKETSIZE & TRENDS 2004-2014

### 2.2.1 Total UK Ceramic Tile Market 2004-2014

The overall UK Ceramic Tile market is currently valued at around XXXXX million at manufacturers selling prices in 2010, reflecting a sector that has experienced XX in recent years.

The following chart illustrates our estimates of the performance of the overall UK Ceramic Tile market since 2004, with forecasts to 2014:-

**Figure 1: Total Ceramic Tile Market – UK 2004 - 2014 By Value £mn**

SAMPLE

**Source: MTW Research / Trade Estimates**

As illustrated, the total UK Ceramic Tile market is estimated to have grown from a value of around XXXXXXXXXXXXXin 2004 to XXXXXXXXXXXXXXX by year end December 2010, reflecting an overall growth of some XXXXXXXX over a 6 year period. XX XXXXXXXX however, growth has XXXXXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXX driven by a wide range of factorsXXXXXXXXXXXX XX XXXXXXX XXXXXXX XXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXX XXXXXXX X XXXXXXXXXXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX

In historical terms, Ceramic Tile sales experienced XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX between 2004 and 2007, with annual XXXXXXXXXXXXXXX between XXXXXXXXXXXXXXX%. Sources indicate that the market XXX during the first quarter of 2008 with the XXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX by the industry during the second half of the year.

During XXXXXXXXXXXXXXX, the initial signs of XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX with commentators suggesting that the real economy XXXXXXXXXXXXXXXXXXXXXXX XXXXXXX XXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXX XXXXXXX XXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXX X. This inevitably impacted on almost all sectors of the XXXXXXXXXXXXXXXXXXXXXXX XXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXX XXXX in which Ceramic Tiles are mostly positioned.

The XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXwhich took hold in Q2 2008 and subsequent XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXX X XXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX XXXXXXX XXXXXXX XXXXXXX XXXXXXXXXXXXXXX XX resulted in XXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXX volume terms for Ceramic Tile retailers, with the market XXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX% in 2008, XXXXXXXXXXXXXXXXXXXXXXXrelatively positive start XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX.





XX  
 XX  
 X However, indications are that XX  
 XX  
 XXX for Ceramic Tile retailers until  
 late 2011 following XXX  
 XX  
 XXXXXXXXXXXXXXX 20%. Real term growth XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XX  
 XX  
 XXXXXXXX

However, there are concerns relating to XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XX  
 XX  
 XX UK  
 Ceramic Tile market during the next 2 years.

**2.2.3 Future Prospects**

In terms of likely future prospects, there is an apparent sense XXXXXXXXXXXXX  
 XX  
 XX  
 XX Ceramic Tile retailers;  
 this should feed through into XXX in the  
 medium to longer term. However, sources also indicate that  
 XX  
 XXXXXXXXXXXX Ceramic Tile retailers to seek XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XX in  
 order to achieve profitability and growth.

Nevertheless, our forecasts suggest that XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XX  
 XX  
 XX  
 XX As the  
 Ceramic Tile market returns to growth. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XX  
 XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX it is likely that the Ceramic Tile market XXXXXXXXXXXXX  
 XX  
 XX  
 growth prospects in the short term.

As such, our forecasts are for XX  
 XX% during  
 2011. Whilst retailers continue to express XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  
 XXX a shift  
 toward XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX from mid 2011 onwards  
 should offset this issue to some extent in the medium term XXXXXXXXXXXXXXXXXXXX  
 XX  
 XX.





As illustrated in the above chart Glazed tiles XXXXXXXXXXXXXXXXXXXXXXXXXXXX  
XXX currently worth around £XXXXXXXX  
XXXXXXXXXXXXXXXXXX

In order to illustrate historical trends, the following chart illustrates the share  
accounted for by Glazed and unglazed sectors in 2004:-

**Figure 11: Share of Ceramic Tile Market 2004 by Glazed / Un Glazed Tiles**

SAMPLE

**Source: MTW Research / Trade Sources**

As the chart illustrates, there has been XXXXXXXXXXXXXXXXXXXXXXXXXXXX  
XXXXXXXXXXXXXXXXXXXXXXXXX product share in recent years as XXXXXXXXXXXXXXXX  
XXX  
XXX  
XXX  
XXXXXXXXXXmarket share XX  
from 13% in 2004 to XXXX in 2010. The Glazed tile sector has seen  
XXX  
XXXXXXXXXXin 2004 to XXXX in 2010 with a market value XXXXXXXXXXXXXXXX  
XXXXXXXXXXXXXXXXXXXXXXXXXXXX 2004 to XXXXXXXXXXXXXXXX million in 2010.

The following chart illustrates the forecast share for each key product sector within the Ceramic Tile market in 2014:-

**Figure 12: Share of Ceramic Tile Market 2014 by Glazed / Un Glazed Tiles**

SAMPLE

**Source: MTW Research / Trade Sources**

XX  
XX  
XX  
XX.



## 4. CERAMIC TILE PRODUCT MANUFACTURER PROFILES

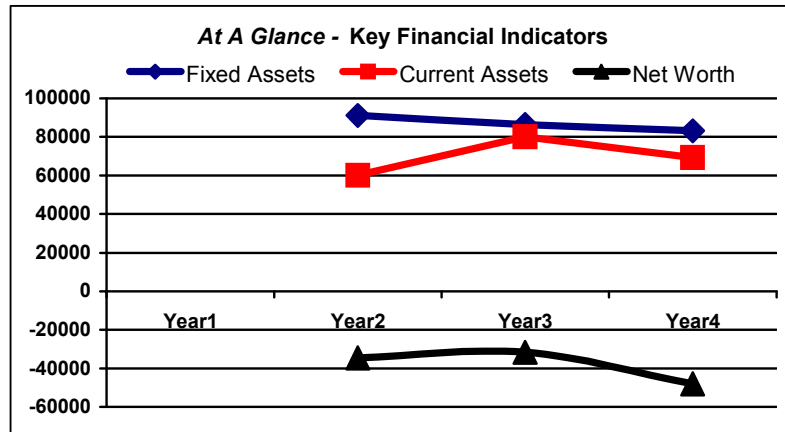
The following section identifies some of the key UK Ceramic Tile product manufacturers and suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

### 4.1 Ceramic Tile Manufacturers Profiles & KPIs

#### Sample Ltd - Company Overview & 'At a Glance'

Sample  
Sample  
Sample  
Sample

Sample Ltd is a private limited with share capital company, incorporated on Sample. The company's main activities are recorded by Companies House as "Manufacture of ceramic tiles & flags". In 2011, the company has an estimated Sample employees.



To year end December 2010, Sample Ltd is estimated to have achieved a turnover of around Sample million. Pre-tax profit for the same period is estimated at around £ Sample million.

The following table briefly provides a top line overview on Sample Ltd:-

<b>Company Name</b>	Sample Ltd
<b>Brief Description of Activities</b>	Manufacture of ceramic tiles & flags
<b>Parent Company</b>	Sample
<b>Ultimate Holding Company</b>	Sample
<b>Estimated Number of Employees</b>	Sample
<b>Senior Decision Maker / Director</b>	Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

#### Sample Ltd - 4 Year KPIs to Year End 30-Sep-2009

Key Indicator £	Year End N/A (Year1)	Year End 30-Sep-2007 (Year2)	Year End 30-Sep-2008 (Year3)	Year End 30-Sep-2009 (Year4)
<b>Fixed Assets</b>	Sample	Sample	£86,521	Sample
<b>Current Assets</b>	Sample	£60,106	£80,131	£69,316
<b>Current Liabilities</b>	Sample	£109,247	£163,222	£165,463
<b>Long Term Liabilities</b>	Sample	£41,643	Sample	Sample
<b>Net Worth</b>	Sample	-£34,604	-£31,570	-£48,021
<b>Working Capital</b>	Sample	Sample	-£83,091	Sample





## **5.5 Specialist Ceramic Tile Retailers Ranking & Turnover Estimates**

### **5.5.1 Ceramic Tile Retailers Listing**

The following identifies some of the key market players active at present:-

**Figure 122: Ceramic Tile Retailers Company Listing**

A & C Dunkley (Boscombe) Ltd	Maurice Parker Ltd
Al-Murad DIY Ltd	J. & W. Mccall Supplied (N.I.) Ltd
Armatile Ltd	Miles Of Tiles Ltd
Bathroom Solutions Ltd	Minoli & Co Ltd
Boyden & Co Ltd	Original Style Ltd
Caesars Ceramics Ltd	Paignton Tile Company Ltd
British Ceramic Tile Ltd	Parkside Ceramics Ltd
Capitol Tiles Supplies Ltd	Pentagon Tile Distributors Ltd
Carvall Group Ceramics	Perfect Home & Garden Ltd
The Ceramic Tile Warehouse Ltd	Porcelanosa Group Ltd
Ceramic Tiles Ltd	Rembrand Ltd
Ceramique Internationale Ltd	R.J. Stokes & Co. Ltd
Colchester Tile Supplies Ltd	Spacers Ceramics Ltd
Collinson Ceramics (Scotland) Ltd	Square Foot Ceramics Ltd
Collinson Tiles Ltd	Sussex Wall & Floor Tiling Ltd
Cosmo Ceramics Ltd	The Natural Slate Company Ltd
Criterion Tiles Ltd	The Tile Source Ltd
Discount Tiles Ltd	Tile Store Ltd
Dome View (Yorkshire) Ltd	The Yorkshire Tile Co Ltd
Dominion Mosaic & Tile Ltd	Thomas Group (Marble & Granite) Ltd
Domus Tiles Ltd	Tile & Bath Co (UK) Ltd
DTW Ceramics Ltd	Tile & Stone Depot Ltd
East Midlands Ceramics Ltd	Tile Choice Ltd
Euro Claddings Ltd	Tile Flair Ltd
Euro Services Ltd	Tile Giant Ltd
European Heritage Ltd	The Tile Market (UK) Ltd
Euxton Tile Supplies Ltd	Tile Mart Ltd
Everton Glassworks Ltd	Tiles (UK) Ltd
Hampshire Tile Warehouse Ltd	Tile Trend Ltd
The Harrison Bailey Company Ltd	Tile Warehouses Ltd
International Tiles Ltd	Topps Tiles (UK) Ltd
Just Tiles Ltd	Tower Ceramics Ltd
LLA Brown & Son Ltd	Waxman Ceramics Ltd
Lomac Tiles Ltd	

**Source: MTW Research / Trade Sources**

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.