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Ceramic Tile Market
Research & Analysis
UK 2014

Report Sample

Ceramic Tile Market Size & Industry Review 2008-2014; SWOT & PEST Analysis, Product Mix & Key Trends 2008-2018; Ceramic Tile Retailers' & Manufacturers Profiles & Key Financials; Market Forecasts to 2018

2nd Edition

August 2014

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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.

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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 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.

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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 2008 and 2014 with forecasts to 2018.
The report also provides top line market size & product mix in 2014 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 2008 to XXXX million by year-end December 2014, reflecting overall growth of some XXXX% over a 6 year period.

The UK Ceramic Tile market was particularly affected by XXXXXXXXXXX XXXXXXXXXX

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

Near term prospects for the Ceramic Tile industry are for XXXXXXXXXXXXX XXXXXXXXXX XXXXXX XXXXXXXXX XXXXXXXXX XXXXXXXXXXXXXXby value. This is likely to reflect XXXXXXX XXXXX XXXXXXXXXXXXXX as CPI (consumer price inflation) is expected to remain well above the current target XXXXXXXXXXXXXX.

An accelerated pattern of growth XXXXXX XXXXXXXXX XXXXXXXX XXXXX XXXX XXXXXXX XXXXXXX XXXXXXXXX XXXXXXXXX XXXXXXXXXXXXXwith the market reaching a value of XXXXXXXX XXXXXX by 2018, reflecting an anticipated growth rate of around XXXXXXXXX between 2014 and 2018. Whilst inflation XX XXXXXXXX this growth, our forecasts are for the industry to XXXX XXXXX XXXXXXX XXX Xreaching a value of some XXXX million by the end of 2018.

The UK ceramic tile market remains dominated by XXXXXXX XXXXXXXXX which are estimated to have accounted for XX XXXX of the total UK Ceramic Tile market in 2014, reflecting a value of around XXXX XXXX with consumers spending around XXXXXXX per week in 2014.

Tile Retailers have experienced a XX XXXXXXXX from XXXX in 2008 to a current estimate of XXX with a value of XXX in the UK. Builders and Plumbers Merchants have also experienced XXXXX XXXX from XXX in 2008 to XXXX in 2014, with an estimated current value of around XXXX million. Both sectors have experienced XXXXXXXXXXXXXXXX since 2008 due to XXXXXXXX as well as the emergence and increasing popularity XXXXXXXXXX

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

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2.2 CERAMIC TILE MARKETSIZE & TRENDS 2008-2018

2.2.1 Total UK Ceramic Tile Market 2008-2018

The overall UK Ceramic Tile market is currently valued at around XXXXX million at manufacturers selling prices in 2014, reflecting a sector that has experienced XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX in recent years.

The following chart illustrates our estimates of the performance of the overall UK Ceramic Tile market since 2008, with forecasts to 2018:-

Figure 1: Total Ceramic Tile Market – UK 2008 - 2018 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 XXXXXXXXXXXXXXin 2008 to XXXXXXXXXXXXXXXX by year end December 2014, reflecting an overall growth of some XXXXXXXX over a 6 year period. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXX however, growth has XXXXXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXX driven by a wide range of factorsXXXXXXXXXXXXX XX XXXXXXX XXXXXXX XXXXXXX XXXXXXXXXX XXXXXXXXXXXXXX XXXX XXXXXXXXXXXXX XXXXXXX X XXXXXXXX XXXXXXXXXX XXXXXX XXXXXXXX XXXXXX XXXXXXXXXX

In historical terms, Ceramic Tile sales experienced XXXXXXXXXXXXXXXXXXXXXXXXXXX between 2008 and 2007, with annual XXXXXXXXXXXX between XXXXXXXXXXXX%. Sources indicate that the market XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX during the first quarter of 2008 with the XXXXXX XXXXXXXXXX XXXXXXXXXXXXXX XXXXXXXXXXXXXXXX by the industry during the second half of the year.

During XXXXXXXXXXX, the initial signs of XXXXXXXXXXXXXXXXXXXXXXXXXXXX with commentators suggesting that the real economy XXXXXXXXXXXXXXXXXXX XXXXXXX XXXXXX XXXXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXXXX XXXXXXXX XXXXXXXXXXX XXXXXXXX XXXXX XXXXXXXXXXXXXX XXXXXX XXXXX XXXXXXXX XXX XXXXXXXXXX XXXXXXXXXXXXXXXXXXX XXXXXXXXXX XXXXXXXXXXXXX XXXXXX X. This inevitably impacted on almost all sectors of the XXXXXXXXXXXXXXXX XXXXXXX XXX XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXX XXX XXXX in which Ceramic Tiles are mostly positioned.

The XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXwhich took hold in Q2 2008 and subsequent XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXX XXXXXXX X XXXXX XXXXXXXXXXX XXXXXXXXXXXXXXXXXXX XXXXX XXXXX XXXXX XXXXXXX XX resulted in XXXX XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX XXXXXX volume terms for Ceramic Tile retailers, with the market XXXXX XXXXXXXXXX XXXXXXXXXXXXXXXXX% in 2008, XXXXXXXXXXXXXXXXXXXrelatively positive start XXXXXXXX XXXXXXXXXX.

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ConsumerexpenditureXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XX

XXXX

Subsequently, the Ceramic Tile market is forecast to XXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX

3. CERAMIC TILE TRENDS & SHARES

Although there XXXXXXXXXXXXXXXXXXXXXXXXXXXXin the UK Ceramic Tile market during XXXXXXXXXXXXXXXXXXXXXXXXXXXXX tiling remains XXXXXXXXXXXXXXXXXXXX

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As illustrated in the above chart Glazed tiles XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX currently worth around £XXXXXXXX XXXXXXXXXXXXX

In order to illustrate historical trends, the following chart illustrates the share accounted for by Glazed and unglazed sectors in 2008:-

Figure 11: Share of Ceramic Tile Market 2008 by Glazed / Un Glazed Tiles

SAMPLE

Source: MTW Research / Trade Sources

As the chart illustrates, there has been XXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXX product share in recent years as XXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX

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The following chart illustrates the forecast share for each key product sector within the Ceramic Tile market in 2018:-

Figure 12: Share of Ceramic Tile Market 2018 by Glazed / Un Glazed Tiles

SAMPLE

Source: MTW Research / Trade Sources

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.

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4. CERAMIC TILE PRODUCT MANUFACTURER PROFILES

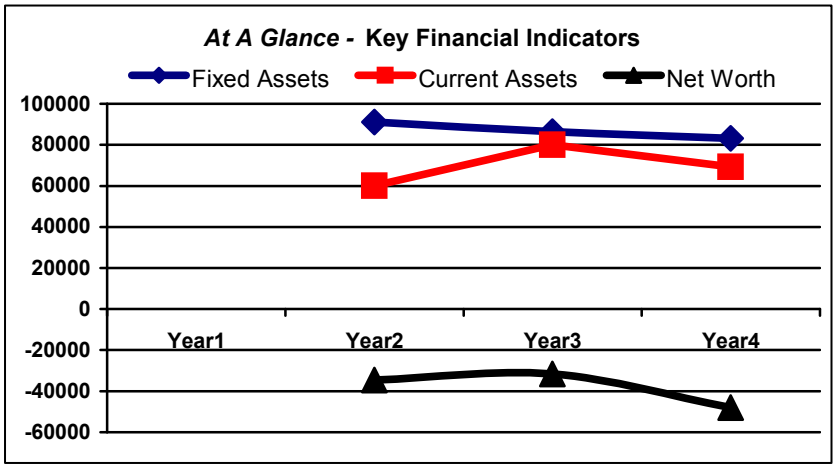
The following section identifies some of the key UK Ceramic Tile product manufacturers and suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does 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 2014, the company has an estimated xxxxx employees.



To year end December 2013, Sample Ltd is estimated to have achieved a turnover of around Sample million. Pre-tax profit for the same period is estimated at around £ xxxx million.

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

Company Name	Sample Ltd
Brief Description of Activities	Manufacture of ceramic tiles & flags
Parent Company	Sample
Ultimate Holding Company	Sample
Estimated Number of Employees	Sample
Senior Decision Maker / Director	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-2013

Key Indicator £	Year End N/A (Year1)	Year End 30-Sep-2007 (Year2)	Year End 30-Sep-2008 (Year3)	Year End 30-Sep-2013 (Year4)
Fixed Assets	Sample	Sample	£86,521	Sample
Current Assets	Sample	£60,106	£80,131	£69,316
Current Liabilities	Sample	£109,247	£163,222	£165,463
Long Term Liabilities	Sample	£41,643	Sample	Sample
Net Worth	Sample	-£34,604	-£31,570	-£48,021
Working Capital	Sample	Sample	-£83,091	Sample

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5. Ceramic Tile Distribution Shares & Trends 2008-2018

5.1 Share by Key Distribution Channel 2014, 2008 & 2018

The following chart illustrates our estimates of the mix by key distribution channels within the UK Ceramic market in 2014:-

Figure 38: Ceramic Tile Market 2014 Share by Key DistributionChannels

Sample

Source: MTW Research / Company Accounts

As illustrated DIY and Hardware Stores XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXUK Ceramic Tile market in 2014, XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXper week in 2014. This sector has experienced XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXThe trend for XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX expected to continue in the longer term XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXX purchasing power.

Further XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXX to increasing Ceramic Tile product portfolios.

Tile Retailers have experienced XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXin 2008 to a current estimate of XXXXXXXXX% with a value of XXXXXXXXXXXX million in the UKXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Internet retailers.

The development of XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXX.

In order to provide a historical context, the 2008 share for each of the key channels illustrated in the following chart:-

Figure 39: Ceramic Tile Market 2008 Share by Key DistributionChannels

Sample

Source: MTW Research / Trade Sources

In terms of future prospects, XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX value to their product portfolio should underpin the market in the near-medium term.

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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) Limited
Al. Murad D.I.Y. Limited
Armatile Limited
Bathroom Solutions Limited
Boyden & Co.Limited
Capitol Tile Supplies Limited
Ceramic Tiles Limited
Ceramiks Limited
Ceramique Internationale Limited
Collinson Ceramics (Scotland) Limited
Collinson Tiles Limited
Cosmo Ceramics Limited
Discount Tiles Limited
Domeview (Yorkshire) Limited
Dominion Mosaic & Tile Co. Limited
Domus Tiles Limited
Dtw Ceramics (UK) Limited
East Midlands Ceramics Limited
Euro Claddings Limited
Euro Services Limited
European Heritage Limited
Euxton Tile Supplies Limited
Fired Earth Limited
Hampshire Tile Warehouse Limited
J. & W. Mccall Supplies (N.I.) Limited
Just Tiles Limited
Lla Brown & Son Limited
Mandarin Stone Ltd
Maurice Parker Limited
Minoli & Company Limited
Original Style Limited
Paignton Tile Company Limited
Parkside Ceramics Ltd.
Pentagon Tile Distributors Limited
Perfect Home And Garden Ltd
Porcelanosa Group Limited
R.J.Stokes & Co. Limited
Square Foot Ceramics Limited
The Ceramic Tile Warehouse Limited
The Ceramic Tile Warehouse Limited
The Harrison Bailey Company Limited
The Natural Slate Company Limited
The Tile Market (UK) Limited
The Tile Source Limited
The Tile Store (Petersfield) Limited
Thomas Group (Marble & Granite) Limited
Tile & Bath Co (UK) Ltd
Tile And Stone Depot Limited
Tile Choice Limited
Tile Giant Limited
Tile Mart Ltd
Tile Trend Limited
Tile Warehouse Imports Limited
Tile Warehouses Limited
Tileflair Limited
Tileflair Limited
Tilemania (Norwich) Limited
Tiles (UK) Limited
Topps Tiles Plc
Tower Ceramics Limited
Waxman Ceramics Limited

Source: MTW Research / Trade Sources

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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.