

Spanish ceramic tile industry

Ana Martínez

Head of Trade, Promotion and Communication

ASCER

Asociación Española
de Fabricantes de Azulejos
y Pavimentos Cerámicos

WHO ARE WE?

ASCER

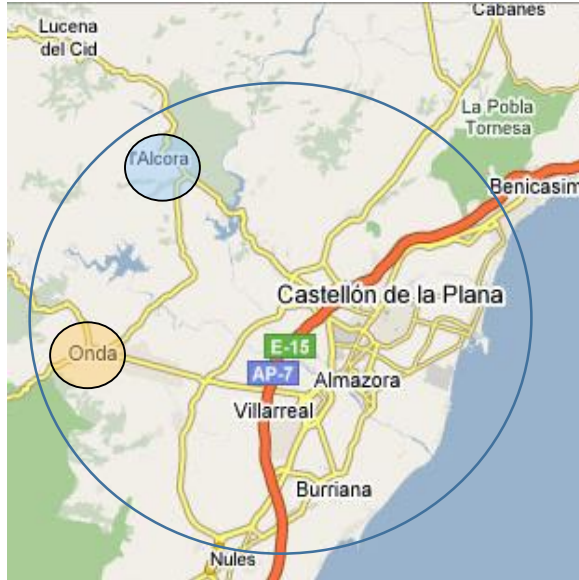
Asociación Española
de Fabricantes de Azulejos
y Pavimentos Cerámicos



- 95% of Spanish production of ceramic tiles is part of ASCER
- Defense and support the industry interests
- Promotion of Spanish ceramic industry / Tile of Spain
- www.ascer.es and www.tileofspain.com

SPANISH INDUSTRIAL SECTOR AND WORLDWIDE LEADER

World leading industry with Spanish origin and capital



It forms an **industrial cluster** with an important economic, social and employment impact in a small geographic area (province of Castellón).

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STRUCTURE OF THE INDUSTRY

INDUSTRIAL CLUSTER: it comprises industries and related services, glazes, frits, clays and machinery manufacturers, design, university, ITC, public support, specialized knowledge...

- 160 factories
- High geographical concentration in the province of Castellón: 83% of total companies and more than the 95% of total production.



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LEADING INDUSTRY

- Most advanced single fired **technology**
- High quality **clays** with a very low organic proportion
- Proximity to **ports**
- Support of glazed and frits industry with leading **investigation** institutes as ITC (Institute for ceramic technology).
- **Innovations** in technology. E.g. **inkjet**
- Leader in solutions for **architecture**



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Ceramic tiles industry



First European producer

First European exporter in volume and second of the world



Around 3.600 million euros in sales (2018)



2.647 million euros of trade surplus

Third industrial sector in Spain



15.000 directs jobs

At least 15.000 indirect jobs


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TOP LINE FIGURES

TOTAL SALES

 **3.600** million €
2%

TOTAL PRODUCTION

530 million sq.m.


Over 2017 total sales and production

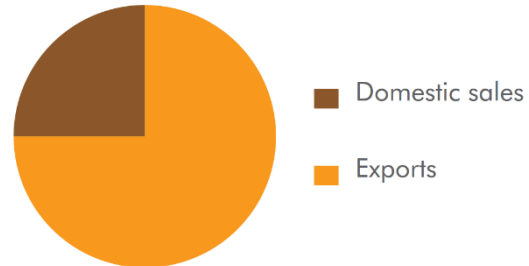
TOP LINE FIGURES



187 countries

EXPORTS (Sales abroad record)

2.710 million €
1%

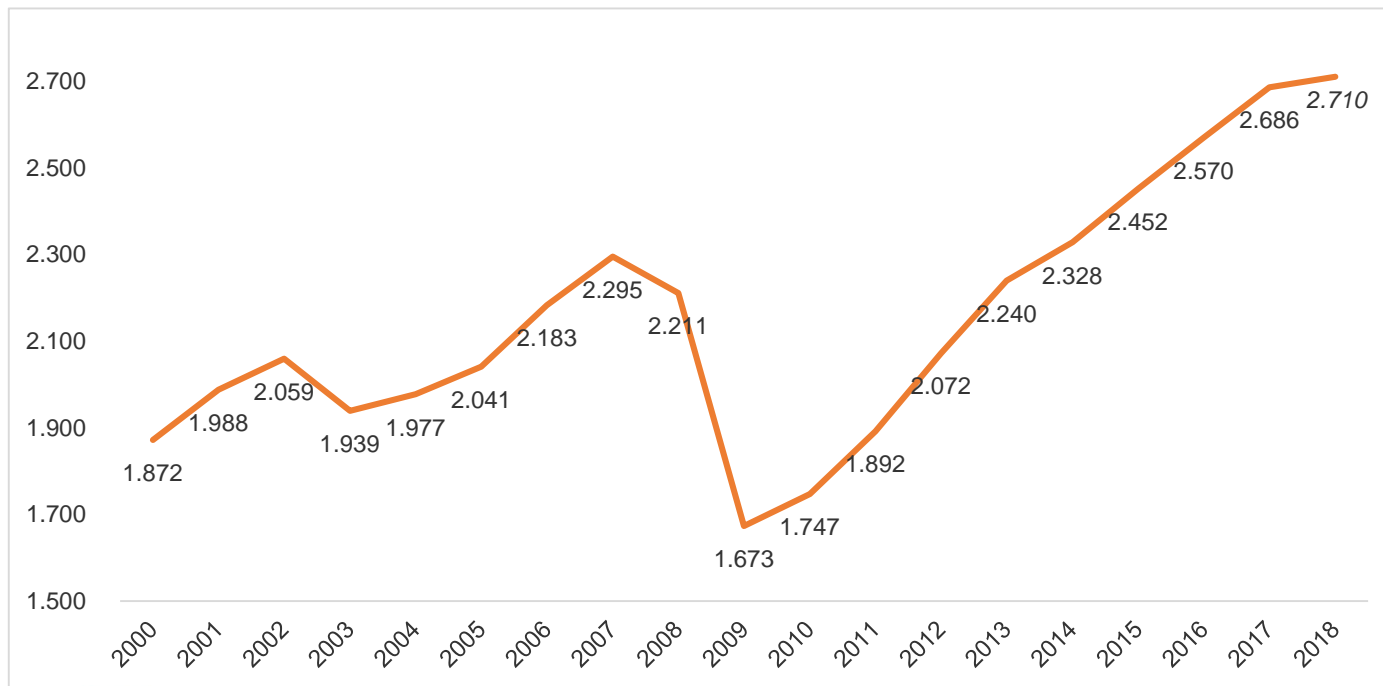


Domestic sales

Exports

EXPORTS

Spanish ceramic tiles exports evolution 2000-2018 Million €



**New exports record
in 2018 with 2.710
million euros***

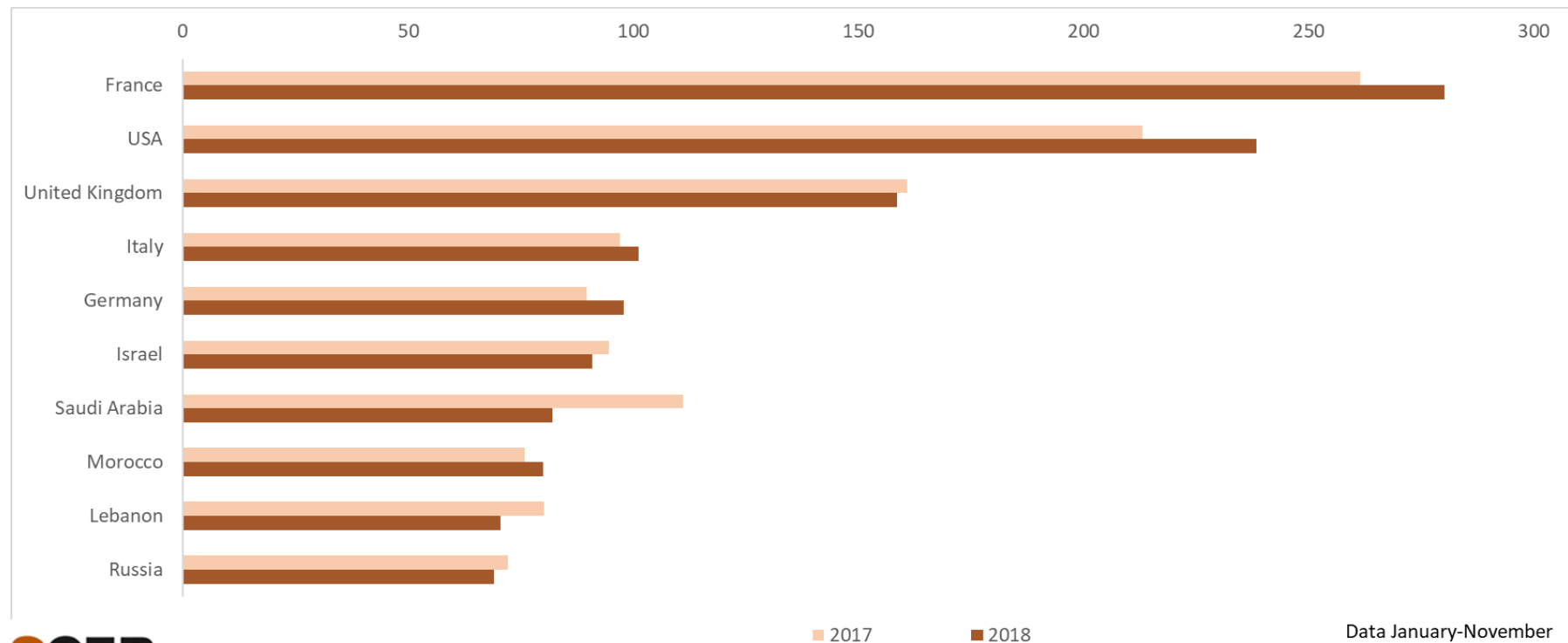
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*Jan-Nov 2018

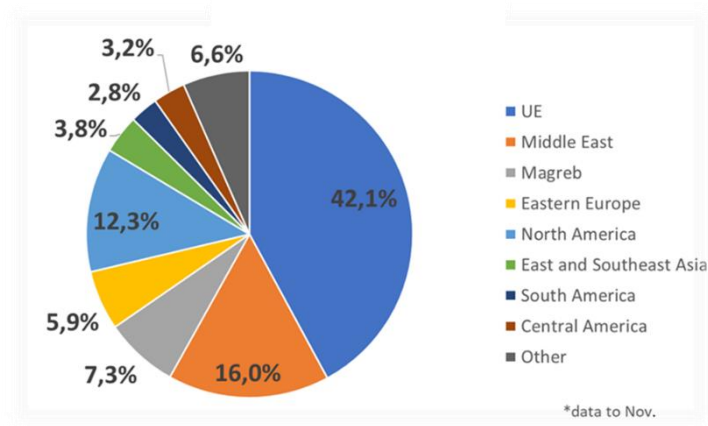


TOP 10 MARKETS



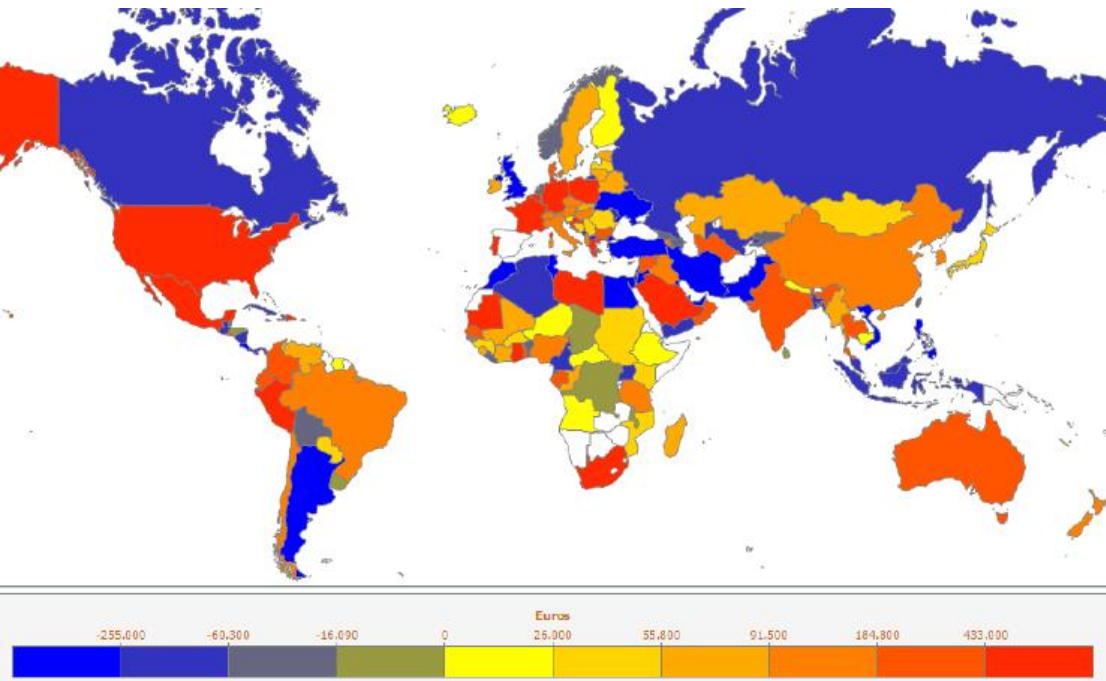
TOP LINE FIGURES

Area/Continent	Jan-Nov 2018	Evolution	% on turnover
	Million €	%	%
European Union	1.073,4	6,5	42,1
Eastern Europe	149,8	-1,5	5,9
America	465,9	9,8	18,3
Asia	513,4	-13,9	20,1
Africa	291,5	10,4	11,4
Oceania	27	12,4	1,1
TOTAL EXPORT	2.548,5	1,9%	75%

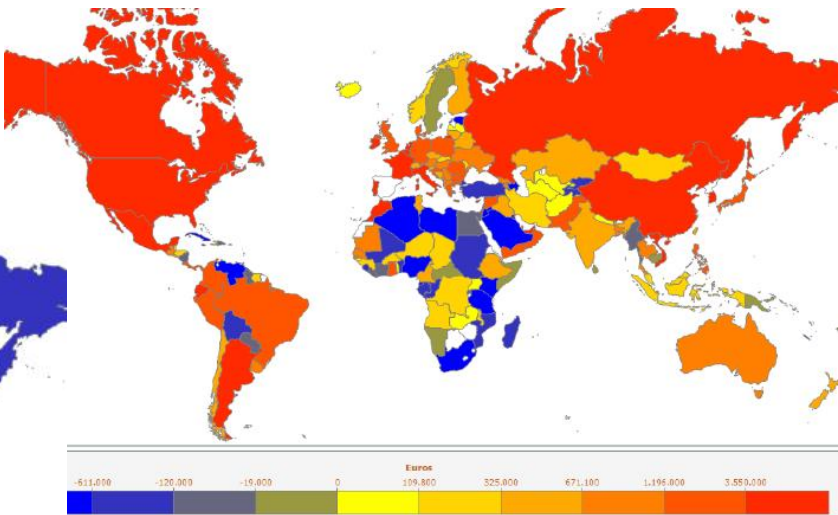


EXPORTS - Absolute variation (€)

2018



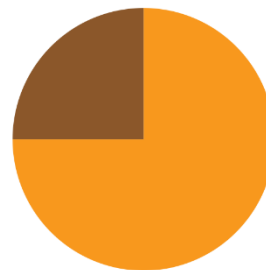
2017





DOMESTIC SALES

890 million €
7-8%



■ Domestic sales

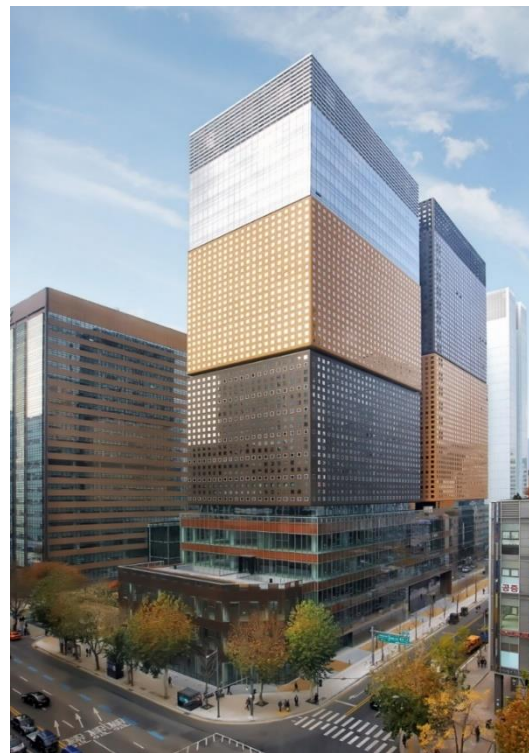
■ Exports

INCREASING WORLD CONSUMPTION

- 1. Increase of population with access to ceramic**
- 2. Ceramic gains ground over other materials**
- 3. New applications, solutions and spaces**

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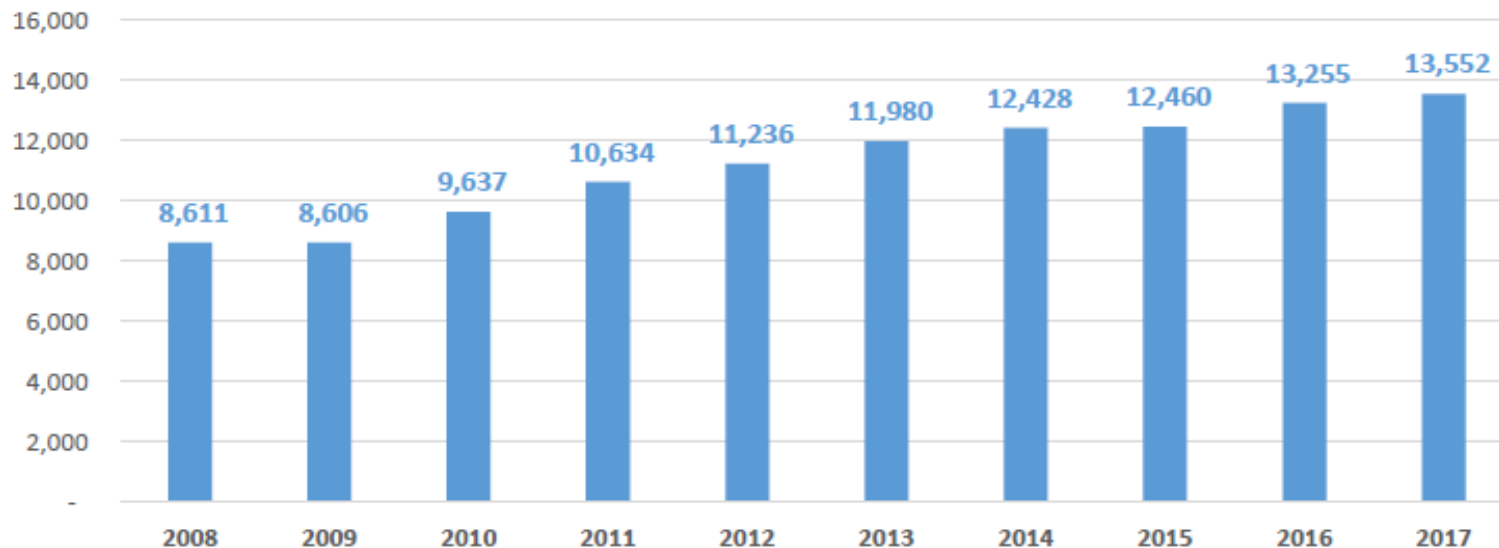
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Corea D Tower



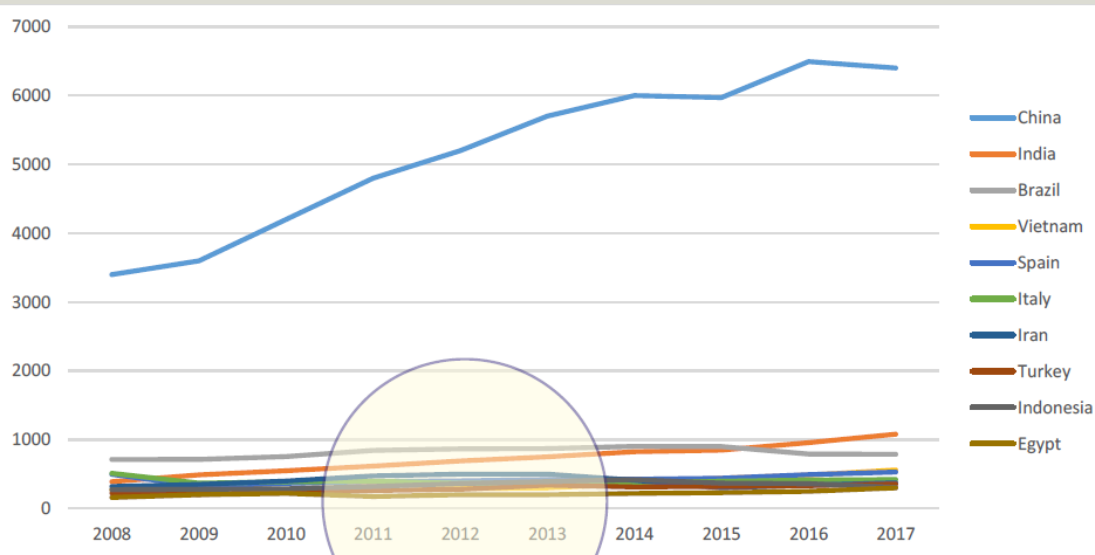
World ceramic tiles production (2008-2017) (in millions sqm)



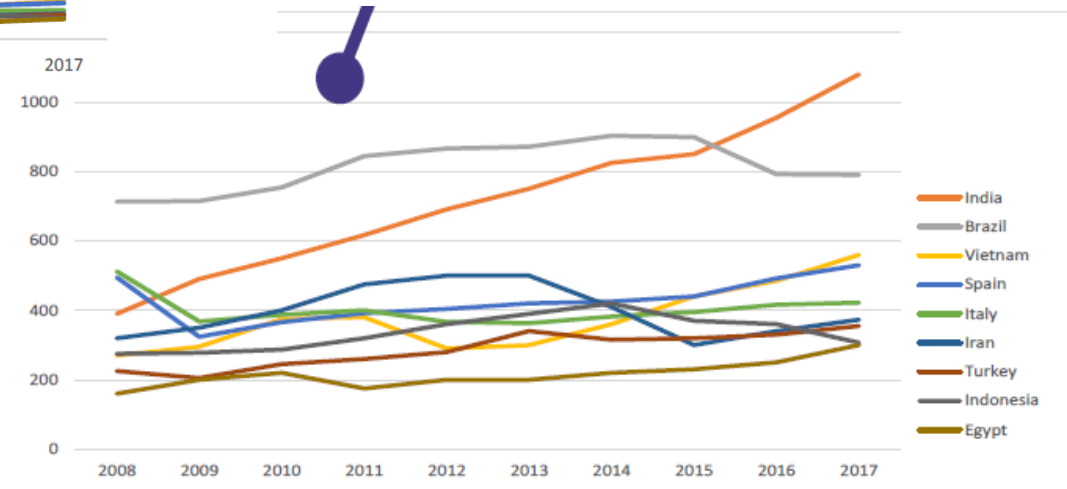
Source: ACIMAC

GLOBAL DATA

Main global manufacturers (2017)



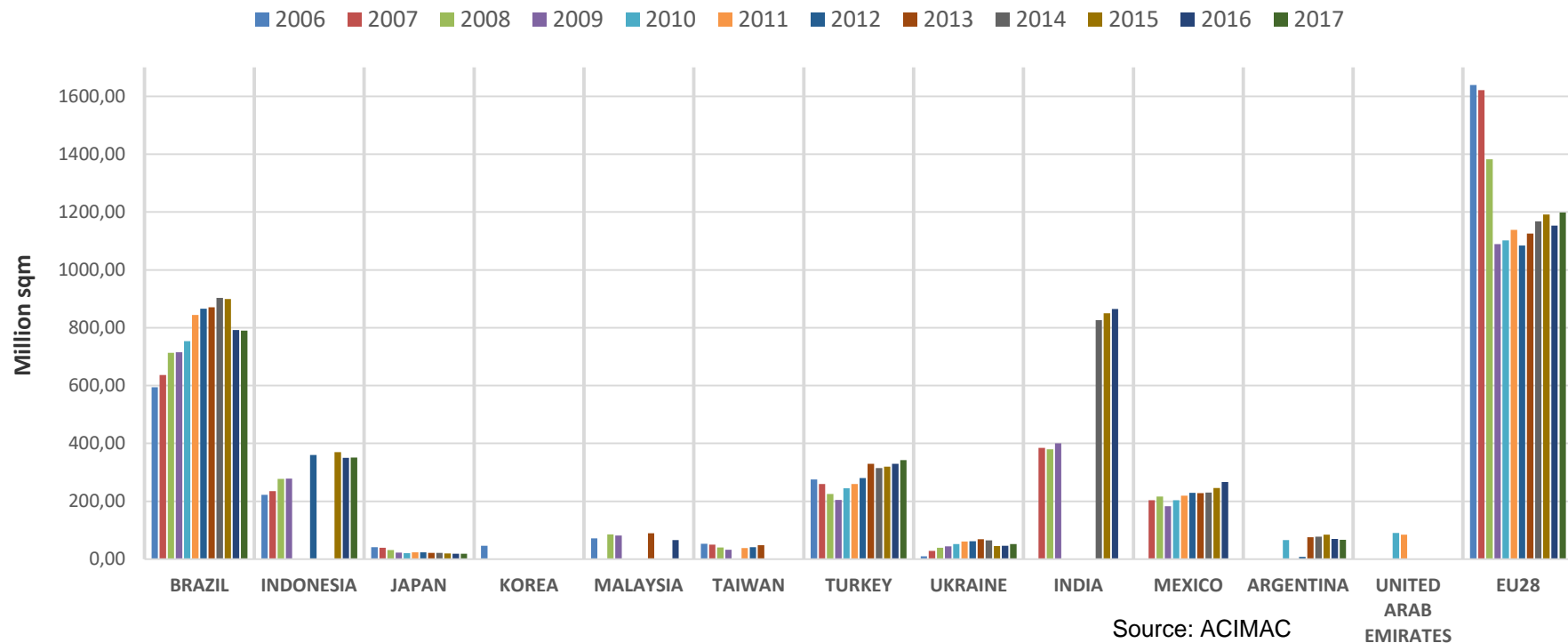
Source: ACIMAC



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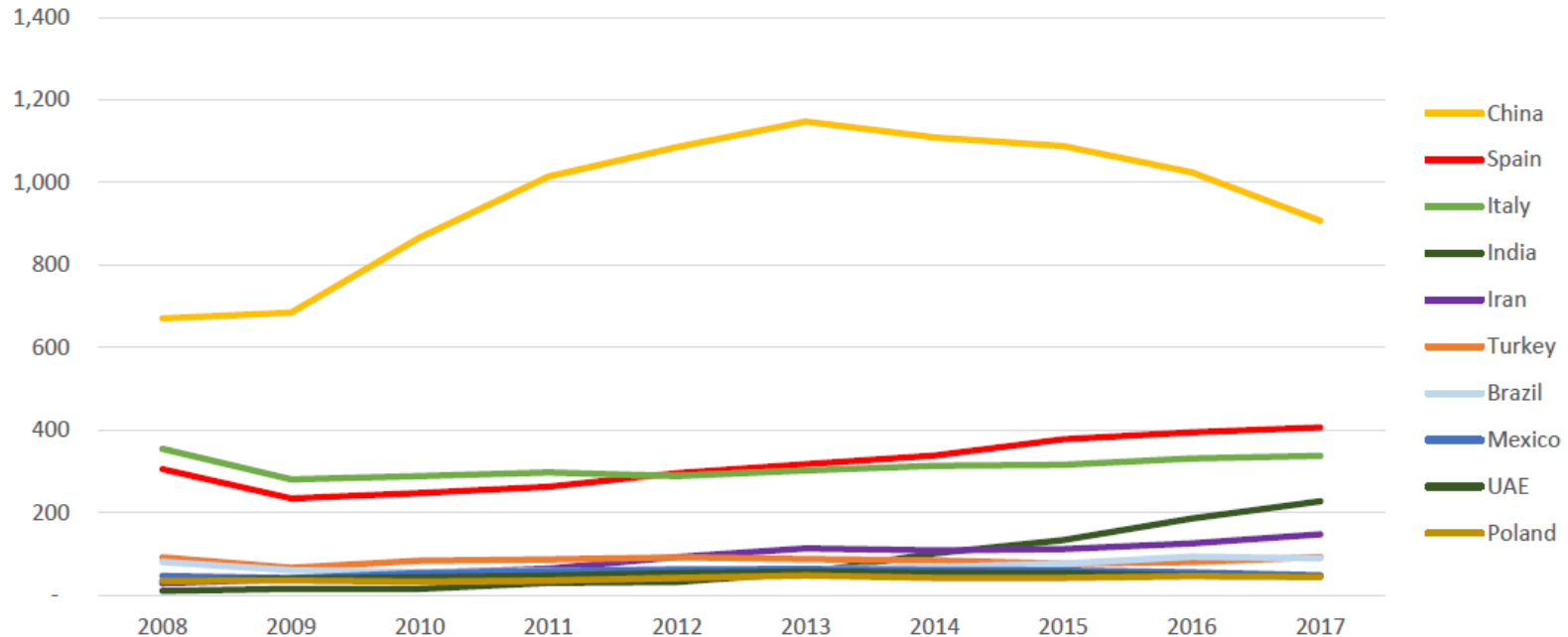
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Ceramic Tiles Production (without China) Evolution 2006-2017



Source: ACIMAC

Main global exporters (2017) (in millions sqm)



Source: ACIMAC

SWOT

STRENGTHS

- 1st EU producer
- 1st EU exporter (volume)
- 2nd worldwide exporter (volume)
- Recognition of Tile of Spain

WEAKNESSES

- High energy costs
- Logistic costs – Mediterranean Corridor
- Restrictive regulations

OPPORTUNITIES

- High R+D level
- Increasing differentiating value

THREATS

- Economic situation worldwide and growing number of competitors
- Trade barriers

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27th February 2019

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ARCHITECTURE



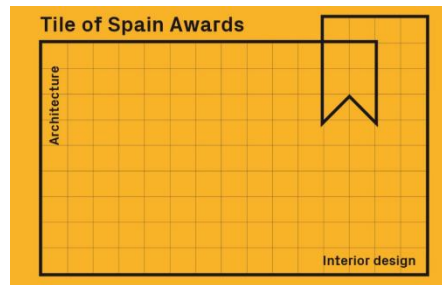


Tile of Spain Awards. ASCER

Spanish ceramic tile industry in the emblematic architecture



**Tile of
Spain Awards**
Architecture
Interior design



www.tileofspainawards.com





Tile of Spain Awards. ASCER

Spanish ceramic tile industry in the emblematic architecture

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ASCER
Spanish Ceramic Tile
Manufacturers' Association



Tile of
Spain Awards
Architecture
Interior design





INDUSTRIAL BUILDINGS

CAVE À VIN Mont-Ras (Girona). J.Vidal-V.Rahola





URBAN SPACES- Amsterdam Student Housing. Studioninedots Amsterdam

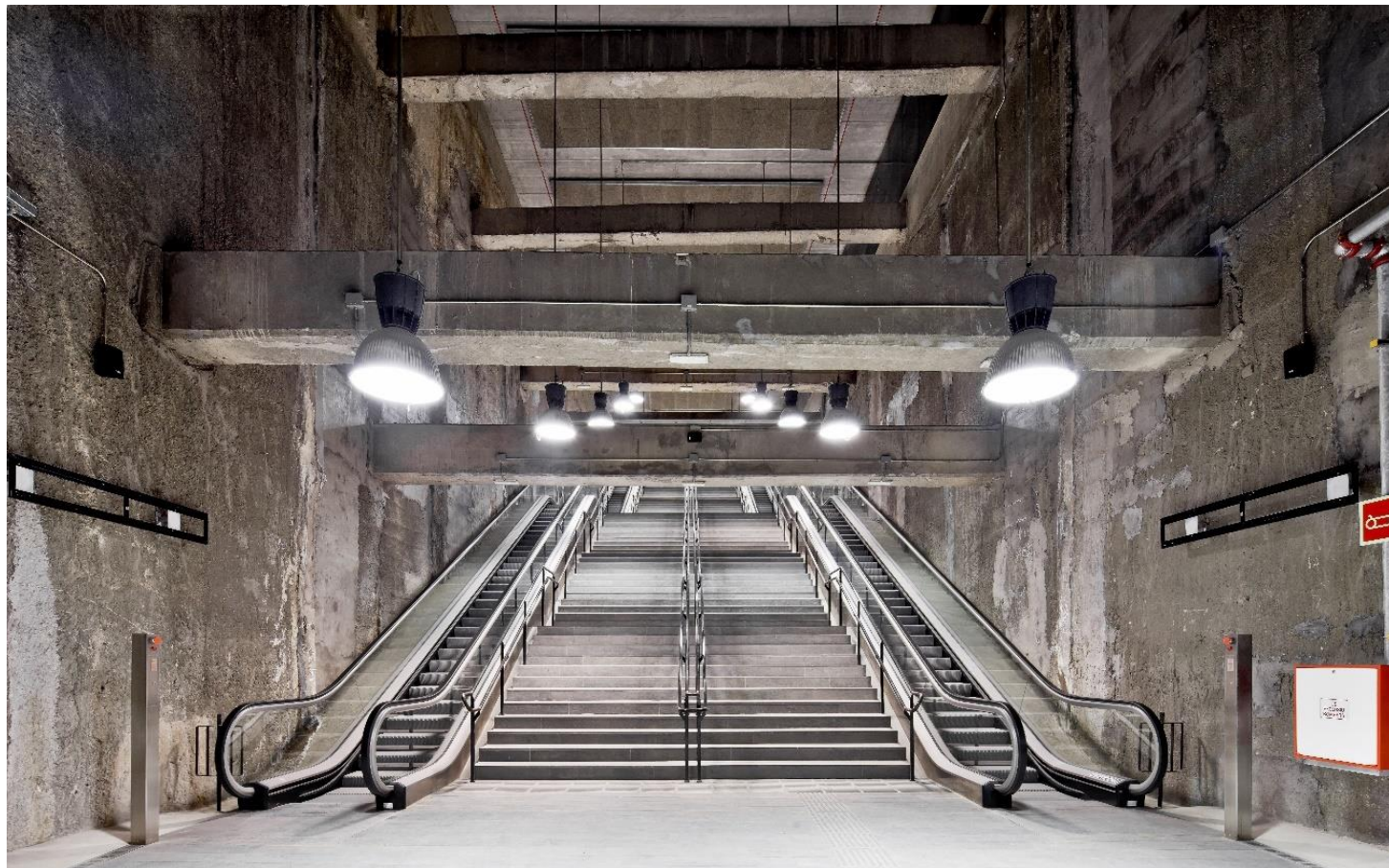
Design & architecture.





URBAN SPACES- 3 metro stops L9

Garcés-de Seta- Bonet Arquitectes





PUBLIC SPACES

SPORT HALL ALBERTO CAMPO BAEZA





PUBLIC SPACES

ESCOLA GAVINA_Gradoli, Sanz, Martinez





PUBLIC SPACES

MAAT Museum (Lisbon) AL-A Architects





RESTAURANTS

Ferrater. Cocina hermanos Torres.





RESTAURANTS

Tuna restaurant (Barcelona) El Equipo Creativo





RESTAURANTS

RCR Architects Pritzker



Design & architecture.





HOTELS. Santacreu hôtel (Tabarca)

Diego López Fuster + Subarquitectura





HOUSES

Single house (Alicante). Pablo Muñoz





HOUSES

Can Picafort (Mallorca) Ted'A arquitectes



TRAINING

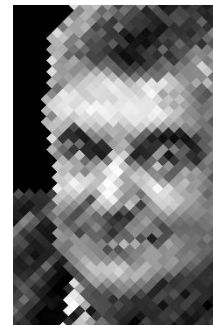




NETWORK OF CERAMIC TILES



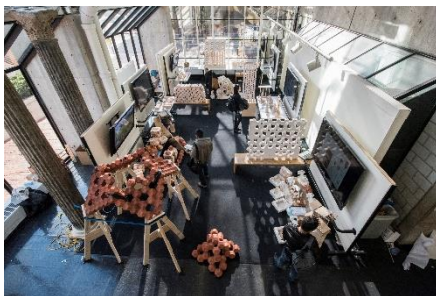
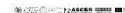
 **network of ceramic tile studies departments**
ascer



César Ruiz-Larrea
Ruiz-Larrea & Asociados

"Investigación y diseño
en la nueva arquitectura"

Arquitecto y arquitecta de 2003
10 años
Más de 100 proyectos
Premios
Eduardo de Miguel
Director de la Cátedra



New ways of thinking

Skills

Conferences

Visits

Exhibitions

Workshops





NETWORK OF CERAMIC TILES

GSD HARVARD AT CEVISAMA





NETWORK OF CERAMIC TILES

GSD Harvard –3D PRINT





NETWORK OF CERAMIC TILES GSD HARVARD AT CEVISAMA





NETWORK OF CERAMIC TILES

GSD HARVARD AT CEVISAMA

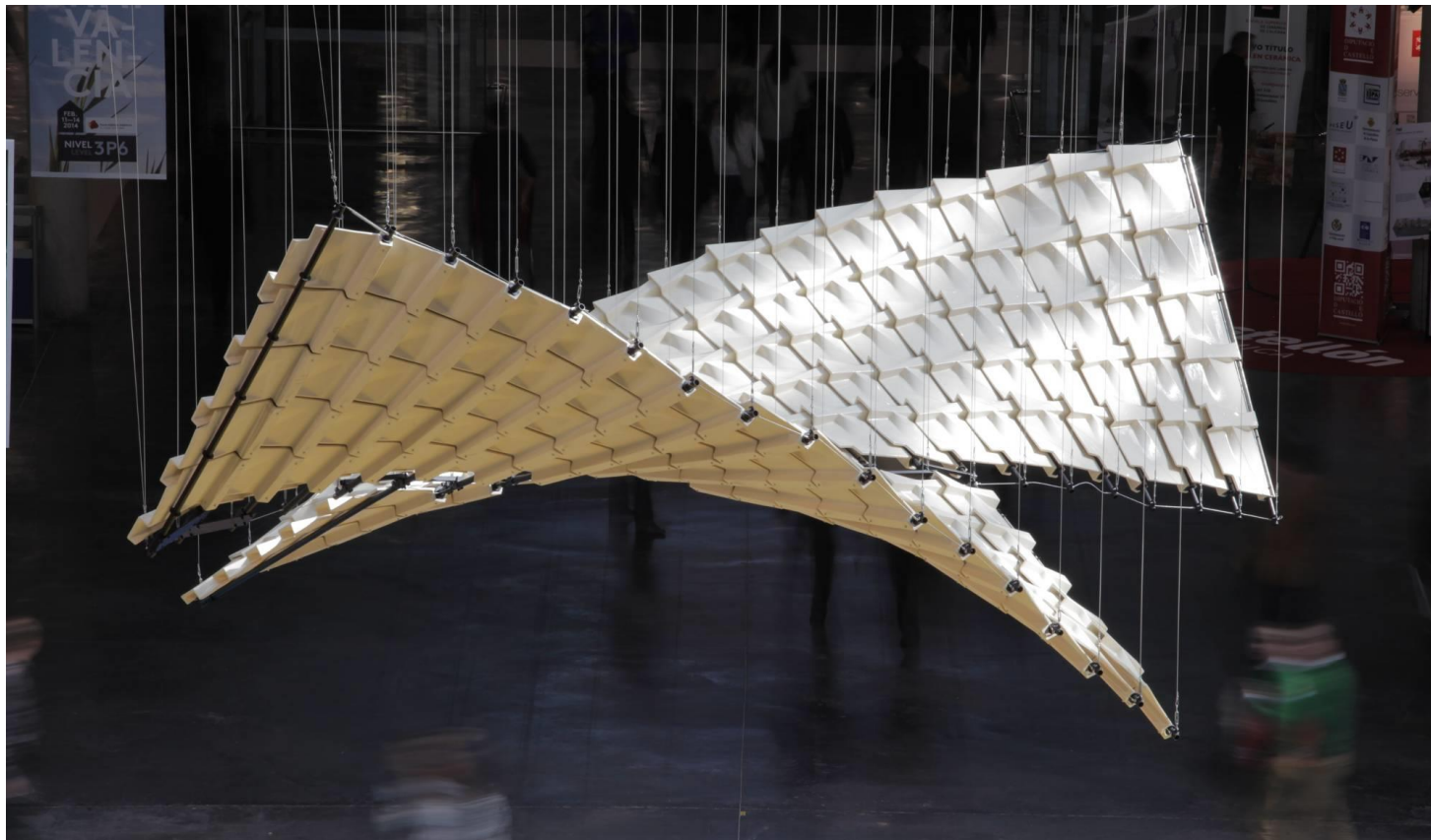




NETWORK OF CERAMIC TILES

GSD HARVARD AT CEVISAMA

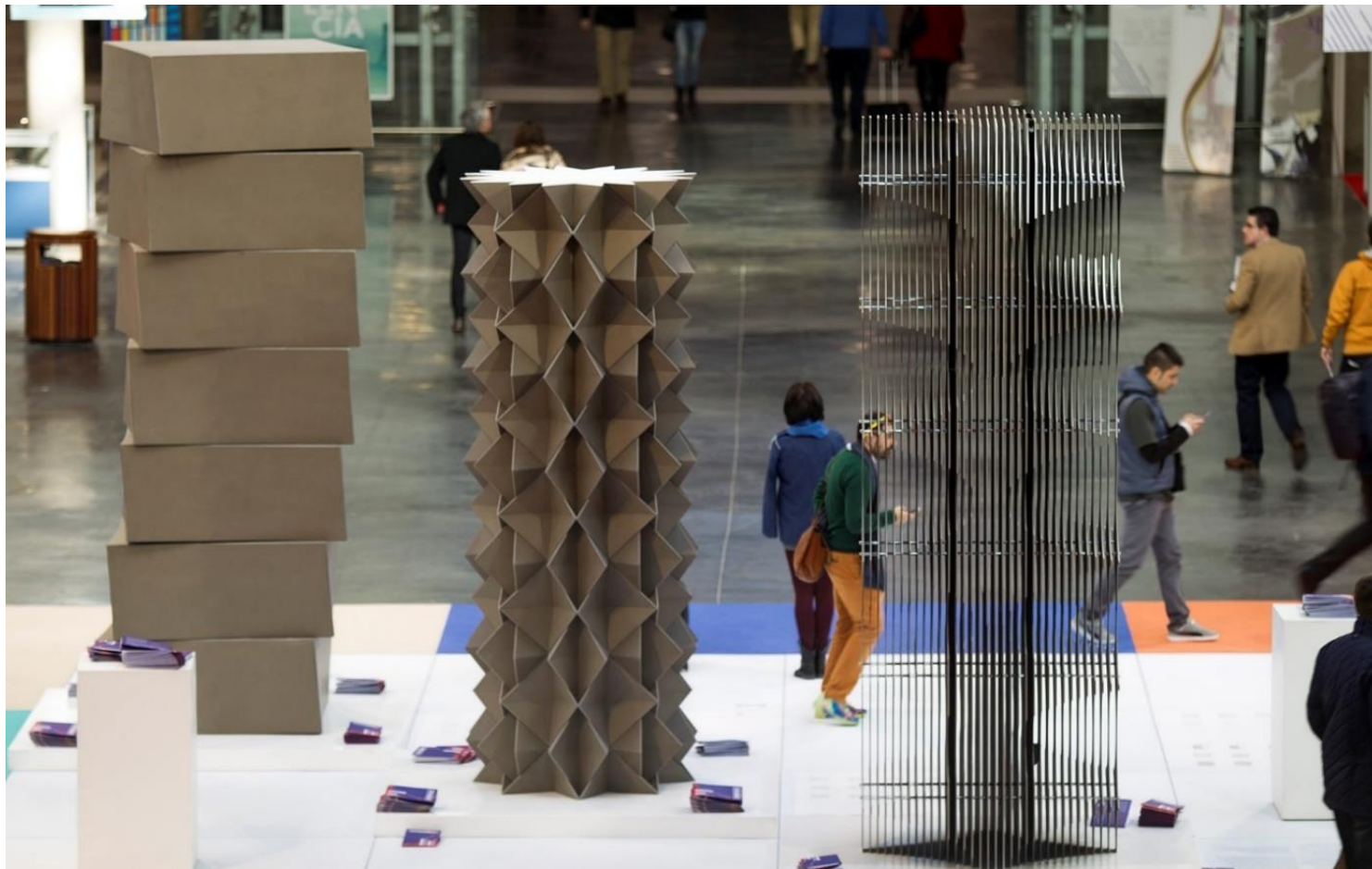
PARAMETRIC DESIGN





NETWORK OF CERAMIC TILES

GSD HARVARD AT CEVISAMA



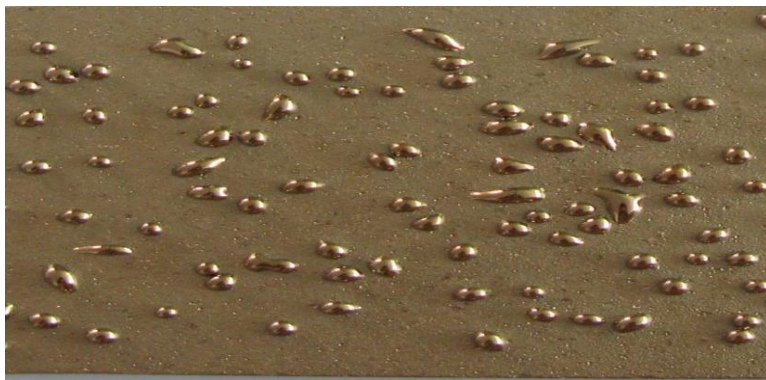
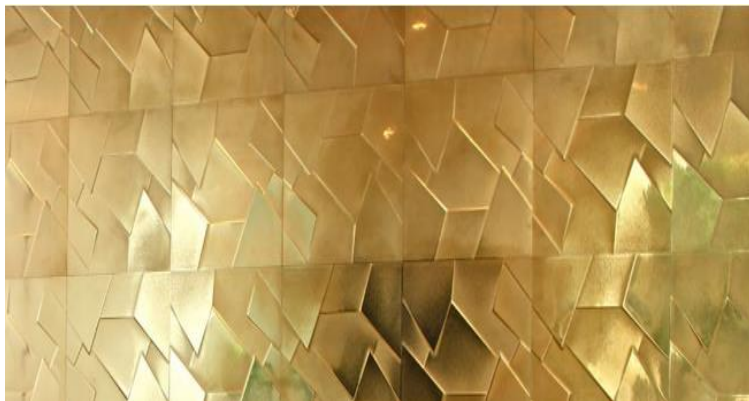
INNOVATION





RESEARCH AND INNOVATION

3D INKS





INNOVATION NEW GLAZES



MUCA Auditorium Casa de la Música_COR



INNOVATION DIGITAL PRINT





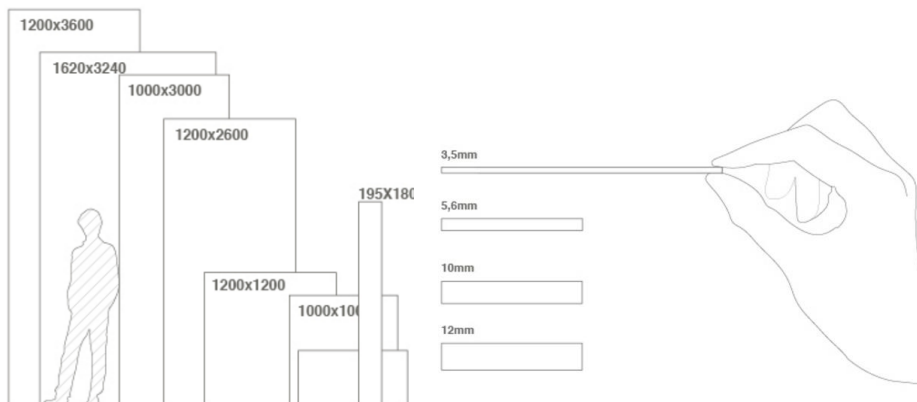
INNOVATION

HYDRAULIC CUTTING_ ROCA GALLERY_Z. HADID





INNOVATION LARGE-SIZE TILES





INNOVATION: NEW APPLICATIONS WORKING AREA





INNOVATION: NEW APPLICATIONS FURNITURE AND EQUIPMENTS



SUSTAINABILITY

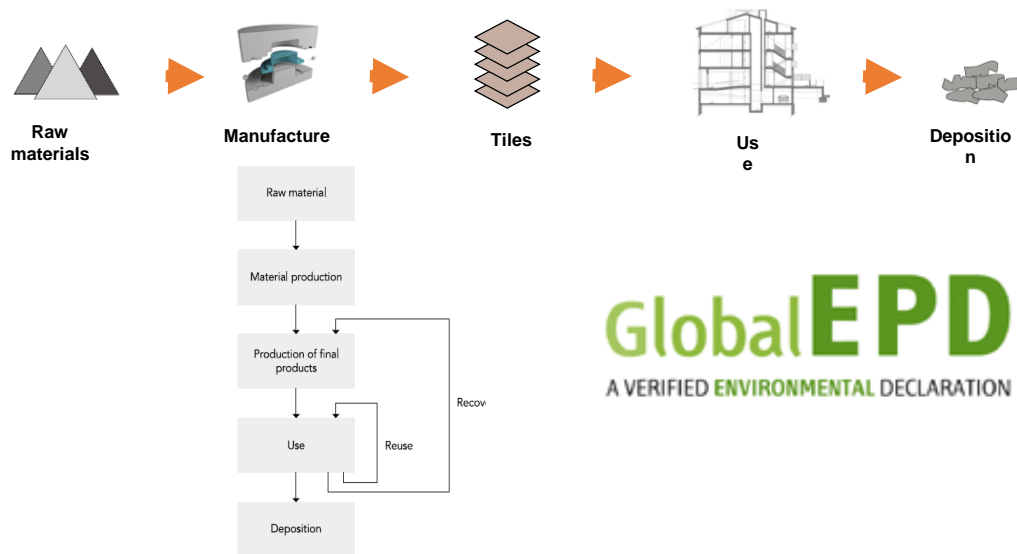




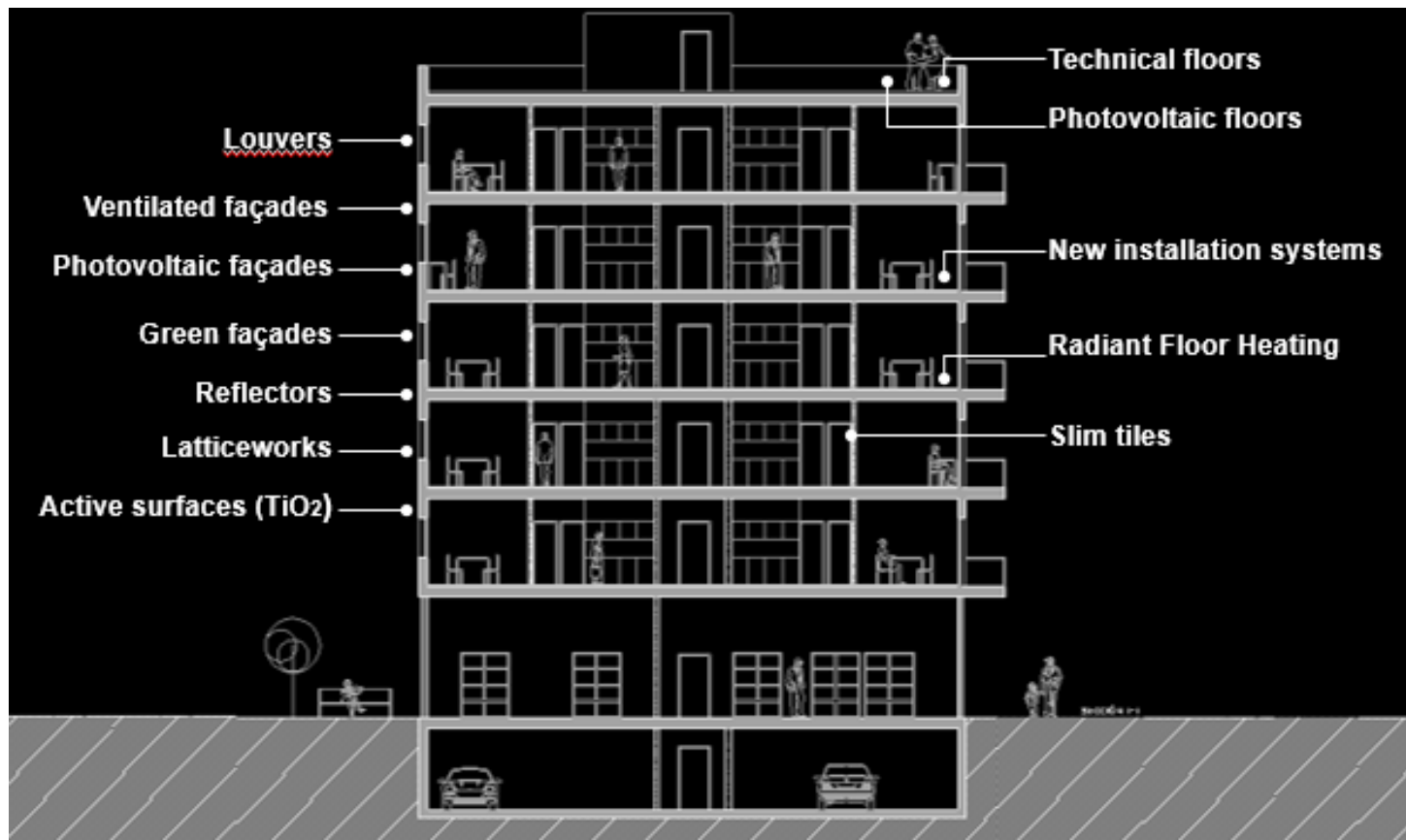
CERAMIC

LIFE CYCLE- NATURAL MATERIAL

Real market information about our sector (from **cradle** to **grave**)



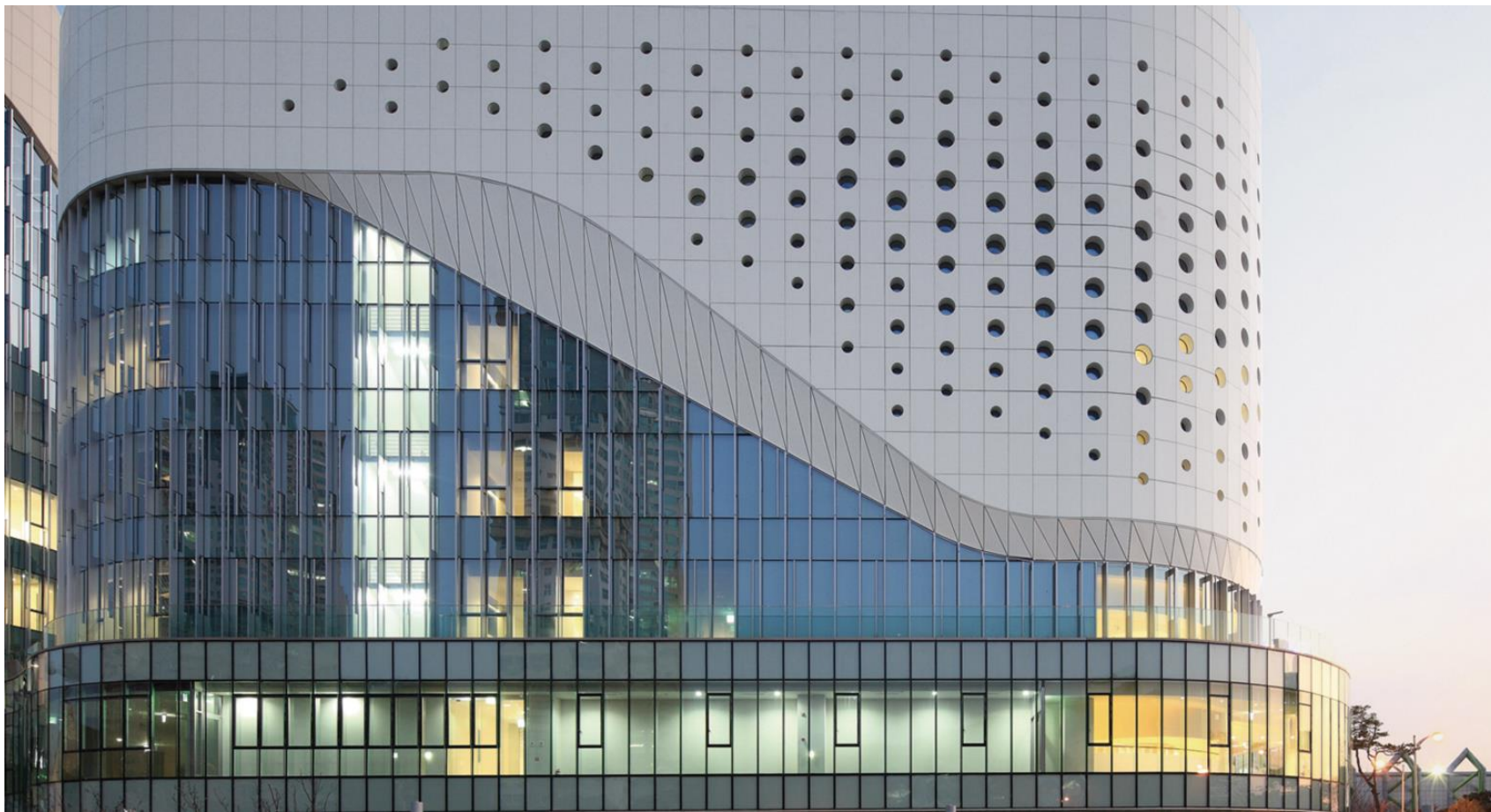
GlobalEPD
A VERIFIED ENVIRONMENTAL DECLARATION





SUSTAINABLE ARCHITECTURE

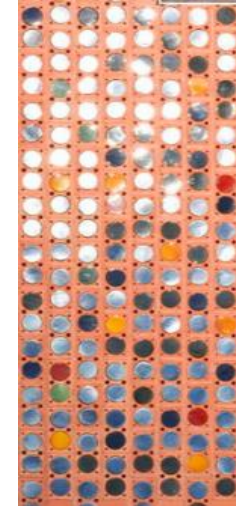
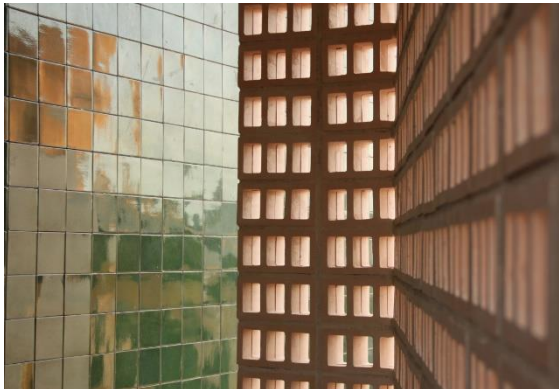
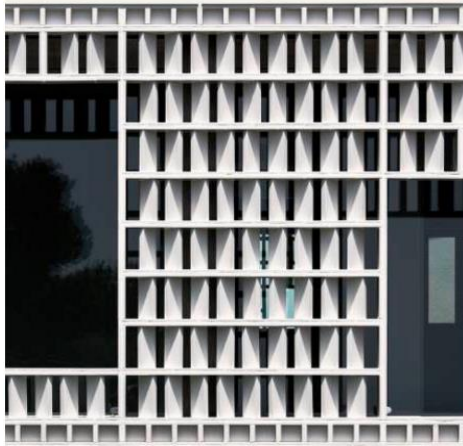
VENTILATED FACADES





SUSTAINABLE ARCHITECTURE

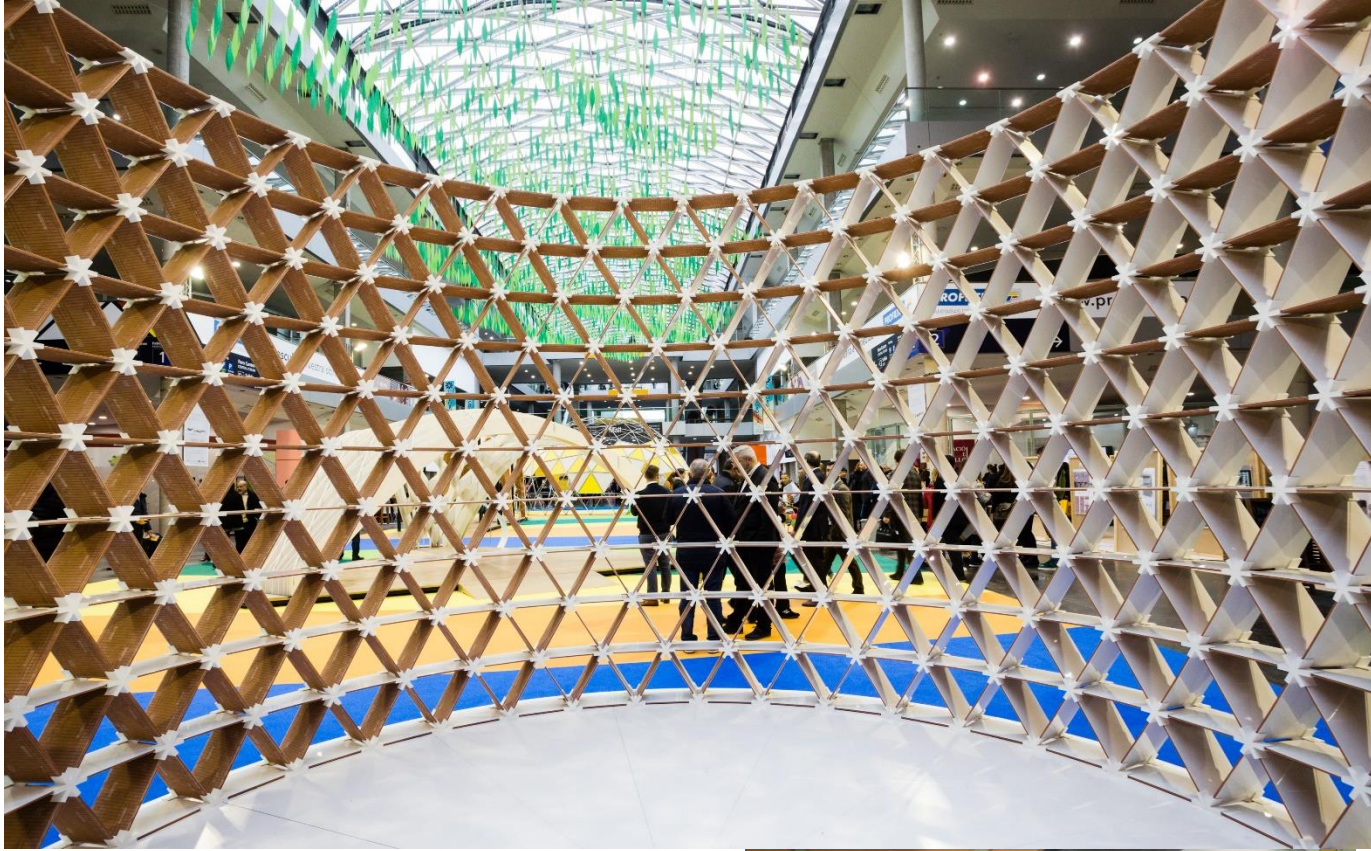
PASSIVE SYSTEMS – BRISE-SOLEILS





SUSTAINABLE ARCHITECTURE

PASSIVE SYSTEMS – BRISE-SOLEILS



SUSTAINABLE ARCHITECTURE

PASSIVE SYSTEMS – BRISE-SOLEILS



Bibliothèque publique Vil-real_Ferrater-**Natucer**



SUSTAINABLE ARCHITECTURE

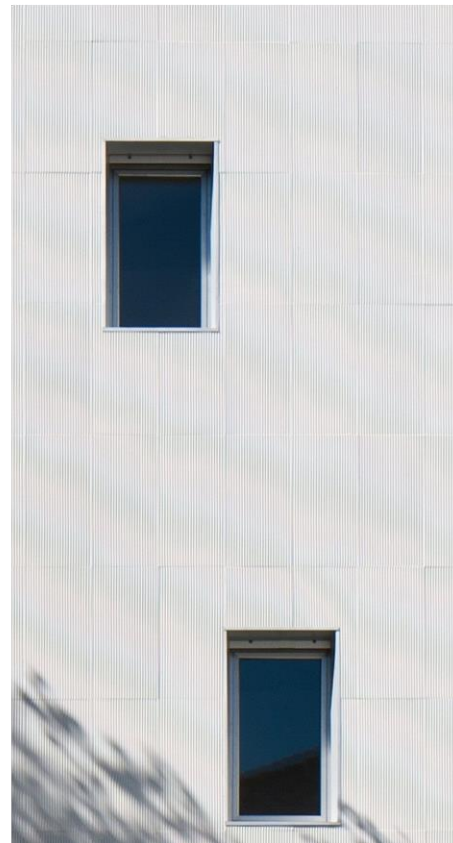
PASSIVEHAUS





SUSTAINABLE ARCHITECTURE

SELF CLEANING FACADES



Logements location Gójar_Elisa Valero



SUSTAINABLE ARCHITECTURE RENOVATION



Maison collage Girona_Bosch+Capdeferro

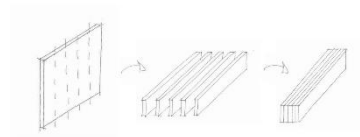


SUSTAINABLE ARCHITECTURE LIFE CERSUDS

URBAN AND SUSTAINABLE CERAMIC DRAIN SYSTEM



LIFE
CER
SUDS



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