THE ROMANIAN MARKET OF CERAMIC TILES - 2016

a DEMO sector brief by FRD Center
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Sources consulted for this report: business mass media, the companies, official sources

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**General presentation**

According to market sources, the Romanian market of ceramic tiles and natural stone rose by approximately 10% in 2015 compared to 2014. The estimated value of the Romanian ceramic tiles market is about 250 million EUR for the entire product segment (for walls, floors, interior and exterior).

According to players in the market, the estimated value of the interior ceramic tiles market in Romania is of about 130 million EUR in 2015, after a 10% increase compared to the 115 million EUR in 2014.

The Romanian market of ceramic tiles is dominated by imports, mainly from Italy, Spain and Hungary.

**Imports of Specific Ceramic Tiles Categories**

The Romanian imports of ceramic building bricks, flooring blocks, support or filler tiles and the like (TARIC Code 6904) have recorded some 7.1 million EUR in 2015, which according to the FRD Center analysis represents an increase by approximately 20% compared to the previous year.

As an example, the Romanian imports of ceramic building bricks, flooring blocks, support or filler tiles and the like from Hungary have recorded approximately 2.2 million EUR in 2015.

The imports of unglazed ceramic flags and paving, hearth or wall tiles, unglazed ceramic mosaic cubes and the like, whether or not on a backing (TARIC Code 6907) in Romania have recorded almost 19.8 million EUR in 2015, which according to the FRD Center analysis represents a growth by around 14% compared to 2014.
Imports of unglazed ceramic flags and paving, hearth or wall tiles, unglazed ceramic mosaic cubes and the like, whether or not on a backing in Romania

Source: FRD Center based on Eurostat data

Italy is one of the main exporters of this type of tiles and a long time supplier to the Romanian importers. In 2015, Romania has imported from Italy unglazed ceramic flags and paving, hearth or wall tiles, unglazed ceramic mosaic cubes and the like of almost 8.2 million EUR.

The Romanian imports of glazed ceramic flags and paving, hearth or wall tiles, glazed ceramic mosaic cubes and the like, whether or not on a backing (TARIC Code 6908) have exceeded 107 million EUR in 2015, which according to the FRD Center analysis represents an increase of around 13% compared to 2014.

Source: FRD Center based on Eurostat data
In regards to the imports of glazed ceramic flags and paving, hearth or wall tiles, glazed ceramic mosaic cubes and the like, whether or not on a backing in Romania in 2015, Spain has been the main origin country - with imports of almost 29 million EUR.

**Importers of Ceramic Tiles in Romania**

According to the FRD Center research, some of the main importers of ceramic tiles in Romania, of which many have their own retail chains and stores, are:

<table>
<thead>
<tr>
<th>No</th>
<th>Company</th>
<th>Products</th>
<th>Brands</th>
<th>TO 2014 - million EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Romstal Impex</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces</td>
<td>Bisazza, Ceramicas Aparici, Pamesa Ceramica, Undefasa, Panariagroup - Industrie Ceramiche, Ceramiche Gardenia Orchidea etc</td>
<td>111.2</td>
</tr>
<tr>
<td>2</td>
<td>Tiger Amira Com</td>
<td>Ceramic tiles for: bathroom, exterior spaces, kitchen, living room; Klinkier; Mosaic; Decorative stone</td>
<td>Absolut, Aparici, Aranda, Arte, Azulev, Baldocer, Ceramic Alcora, Cersanit, Domino, Dual Gres, Gayafores, Mallol, Midas, Novogres, Opoczno, Paradyz, Peronda, Sanchis, Stegu, Tubadzin</td>
<td>35.1</td>
</tr>
<tr>
<td>3</td>
<td>Regata</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces; Klinkier</td>
<td>Bocconi, Estambul, Stockholm, Aspen, City, Marmo Borghini</td>
<td>17.1</td>
</tr>
<tr>
<td>4</td>
<td>Delta Studio</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces; Mosaic; Natural Stone</td>
<td>OUTLET, Porcelanosa, Fap, Kerama Marazzi, Keope, Iris Ceramic, Natucer, Zirconio, Dalet etc</td>
<td>7.6</td>
</tr>
<tr>
<td>5</td>
<td>Bravo Group 95 Export Import</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces</td>
<td>Ariostea, Keraben, Mapisa, Marazzi, Mirage, Saloni etc</td>
<td>5.6</td>
</tr>
<tr>
<td>6</td>
<td>Orient Ceramic</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior</td>
<td>n/a</td>
<td>4.2</td>
</tr>
<tr>
<td></td>
<td>Company</td>
<td>Product Offerings</td>
<td>Brands</td>
<td>Score</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>7</td>
<td>Pro-Mac Prod Com Impex</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces</td>
<td>Ape Ceramica, Pamesa Ceramica, Ecoceramic etc</td>
<td>3.7</td>
</tr>
<tr>
<td>8</td>
<td>Halofin Prod</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces</td>
<td>n/a</td>
<td>2.3</td>
</tr>
<tr>
<td>9</td>
<td>Dunca Construct</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, exterior spaces</td>
<td>n/a</td>
<td>2.2</td>
</tr>
<tr>
<td>10</td>
<td>Pazo Grup Holding</td>
<td>Ceramic tiles for: bathroom, kitchen, living room, bedroom, exterior spaces; Natural Stone</td>
<td>Marazzi, Ragno</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Imported ceramic tiles are sold in the modern retail as well as in smaller construction materials stores. DIY and building materials retail chains in Romania include Dedeman, Leroy Merlin, Praktiker and Brico Dépôt (Kingfisher).

The largest retail chain of DIY and home decor is Dedeman, a 100% Romanian chain, with 42 stores in the local market and plans to reach 50 in the following year. In the first half of 2015 the company recorded a 30% increase in sales, of 405 million EUR, after a good year 2014 in which sales reached some 768 million EUR.

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