

THE ROMANIAN MARKET OF CERAMIC TILES - 2016

a DEMO sector brief by
FRD Center





This example of a report is produced by **FRD Center** – www.frdcenter.ro - one of the pioneer privately owned market entry consulting firms in Romania.

Since 2000, FRD Center offers tailor-made market research and intelligence, B2B matchmaking and market access consulting services to foreign organisations interested to enter the emerging markets in Europe as exporters, consultants, investors or joint-ventures, to relocate their operations, or to source in CE, SE and Eastern Europe.

FRD Center is the trade consultant for the Irish Governmental Agency, Enterprise Ireland and the representative of the Murcia region Development Agency (Spain). Other clients are Commercial Sections of Embassies, Export Councils, Trade Governmental Agencies, Chambers of Commerce, private companies, corporations, SMEs from Canada, China, Denmark, Finland, Ireland, Israel, Jordan, Norway, Poland, UK, USA, Switzerland etc.

Our services include:

- market research, investment opportunities assessment, sector studies, market briefs
- B2B matchmaking: identification and qualification of distributors, importers, suppliers
- product presentation and assessment of interest from clients / partners
- pre-M&A business support and research
- identification of market opportunities: exports, sourcing, B2B sales etc.
- trade missions, business itineraries, inward buyer missions

Disclaimer:

Whilst every care is taken in compiling this report, no responsibility is taken for errors or omissions. FRD Center guarantees that this information, collected and generated, has been operated in a professional manner and best efforts were applied with a view to offering accurate and complete results. However, FRD Center will not be held liable for any damage or loss resulting from the use of the information contained herein.

Sources consulted for this report: business mass media, the companies, official sources

***FRD Center endorses the Sibiu International Theatre Festival
SibFest (FITS) - www.sibfest.ro***





General presentation

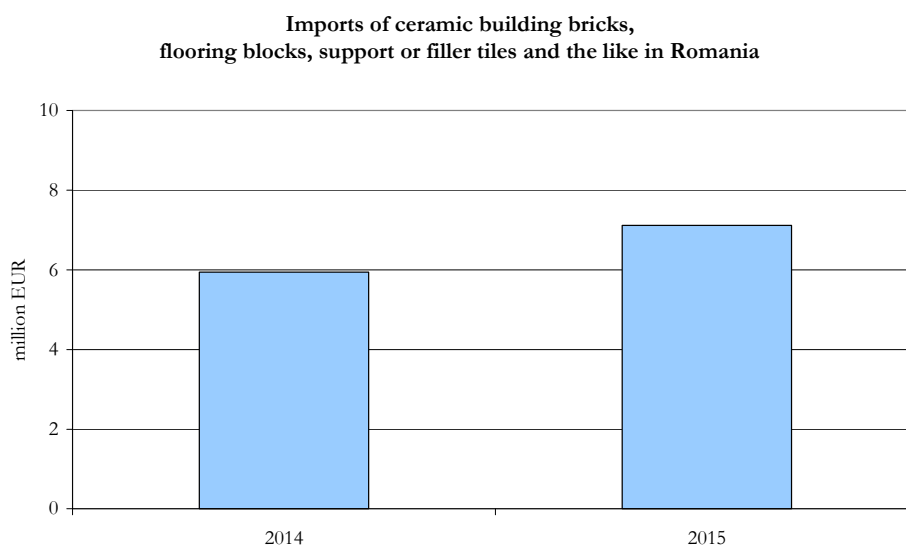
According to market sources, the Romanian market of ceramic tiles and natural stone rose by approximately 10% in 2015 compared to 2014. The estimated value of the Romanian ceramic tiles market is about 250 million EUR for the entire product segment (for walls, floors, interior and exterior).

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.



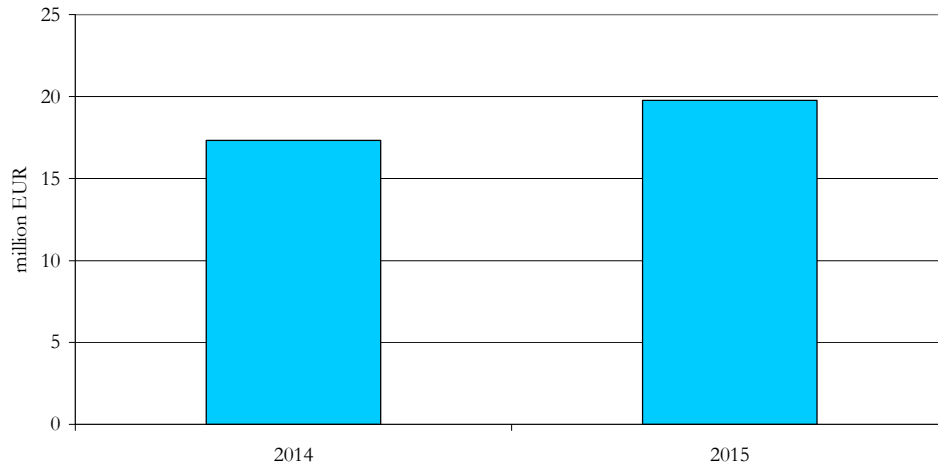
Source: FRD Center based on Eurostat data

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

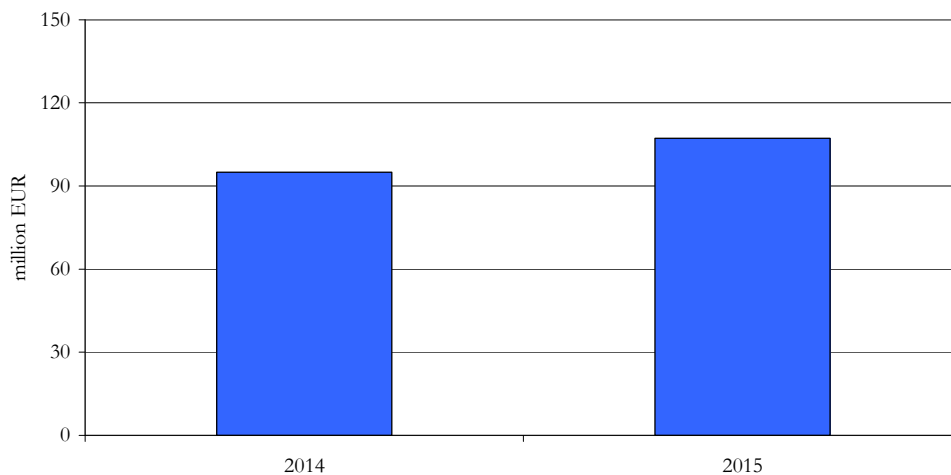


Source: FRD Center based on Eurostat data

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.

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



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:

No	Company	Products	Brands	TO 2014 - million EUR
1	Romstal Impex www.romstal.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces	Bisazza, Ceramicas Aparici, Pamesa Ceramica, Undefasa, Panariagroup - Industrie Ceramiche, Ceramiche Gardenia Orchidea etc	111.2
2	Tiger Amira Com www.tigeramira.ro	Ceramic tiles for: bathroom, exterior spaces, kitchen, living room; Klinkier; Mosaic; Decorative stone	Absolut, Aparici, Aranda, Arte, Azulev, Baldocer, Ceramica Alcora, Cersanit, Domino, Dual Gres, Gayafors, Mallol, Midas, Novogres, Opoczno, Paradyz, Peronda, Sanchis, Stegu, Tubadzin	35.1
3	Regata www.regata.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces; Klinkier	Bocconi, Estambul, Stockholm, Aspen, City, Marmo Borghini	17.1
4	Delta Studio www.deltastudio.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces; Mosaic; Natural Stone	OUTLET, Porcelanosa, Fap, Kerama Marazzi, Keope, Iris Ceramica, Natucer, Zirconio, Dalet etc	7.6
5	Bravo Group 95 Export Import www.e-bath.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces	Ariosteaa, Keraben, Mapisa, Marazzi, Mirage, Saloni etc	5.6
6	Orient Ceramic www.orientceramic.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior	n/a	4.2

		spaces; Mosaic; Natural Stone		
7	Pro-Mac Prod Com Impex www.promac.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces	Ape Ceramica, Pamesa Ceramica, Ecoceramic etc	3.7
8	Halofin Prod www.halofin.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces	n/a	2.3
9	Dunca Construct www.duncaconstruct.ro; www.duncagroup.ro	Ceramic tiles for: bathroom, kitchen, living room, exterior spaces	n/a	2.2
10	Pazo Grup Holding www.pazo.ro	Ceramic tiles for: bathroom, kitchen, living room, bedroom, exterior spaces; Natural Stone	Marazzi, Ragno	1.9

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.

For tailored market research and B2B matchmaking in Romania and the region, please feel free to contact us directly.

FRD Center Market Entry Services
www.market-entry.ro

Contact: Jackie Bojor, Director
europa@frdcenter.ro
 +4021 4111459