

Description of the report

# Ceramic tile market in Poland

edition 2021



# INTRODUCTION



Robert Klos

Managing Director  
Centrum Analiz Branżowych



Maksymilian Miros

Chief Analyst  
Centrum Analiz Branżowych

The last season was successful for the ceramic tile industry. It was successful primarily due to increasing sales. Naturally, the industry faced problems with timeliness of deliveries and rising tile prices, but even those issues were unable to reduce the demand for tiles.

The situation changed radically in 2022, particularly in the middle of the season. The continuing rise in tile and other construction material prices, increasing inflation rate, soaring gas prices, and the sense of insecurity have made customers stop ordering ceramic tiles. This uncertainty about the geopolitical situation, but also the uncertainty about the sizes of households' wallets make

Poles, and also Czechs and Bulgarians, refrain from larger purchases.

This has a negative influence e.g. on ceramic tile sales and the sentiment among manufacturers and distributors has been the lowest for years.

In this edition of the report, we asked nearly ninety managers how the present season has been going for them and what they expect next year in the context of both sales volumes and price levels. The findings are presented in this study.



## About the report

### Ceramic tile market in Poland, edition 2022

is the latest issue of the annual report on the Polish tile sector prepared by Centrum Analiz Branżowych. The study is intended to provide tile manufacturers, suppliers and distribution companies with comprehensive information about the development of the Polish industry home and abroad.

The report discusses the industry's performance in 2022 and Q1-Q3 2022 and the forecast for tile sales in 2023.

The report is composed of 8 chapters, which present:



the macroeconomic environment in which Polish manufacturers operate /**economy, construction industry**/

the **position** of the Polish ceramic tile sector against other European countries,



the **ceramic tile manufacturing** in Poland and the performance of the **leading manufacturers**,

the volume, dynamics, and directions of tile **export** from Poland,



the results of tile **import** and the share of imported tiles in domestic sales,

**tile sales in Poland**



average tile selling **prices** to distributors, price changes in 2022, outlook for 2023

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## Definitions

The analysis covers the ceramic tile market in Poland, including glazed and unglazed tiles, wall and floor tiles, for indoor and outdoor use.

Ceramic tiles are products defined as per:

- NACE v.2 classification – code 23.31.10.0 – ceramic tiles and ceramic paving flags,
- CN classification – codes 6907 (unglazed ceramic flags and paving, hearth or wall tiles; unglazed ceramic mosaic cubes and the like, whether or not on a backing) and 6908 (glazed ceramic flags and paving, hearth or wall tiles; glazed ceramic mosaic cubes and the like, whether or not on a backing).

## Methodology

Research methods and techniques:

- desk research: data from external sources, such as statistical offices, Customs Service, credit agencies, stock exchange reports, press releases, corporate presentations, manufacturers' websites,
- CATI (Computer-Assisted Telephone Interview): interviews made with 82 managers representing ceramic tile manufacturers, importers, and distributors. The respondents were asked to rate the situation in the industry in terms of price changes in this season and the next one. The managers were also asked about their tile sales forecasts for 2023.

The study uses annual average NBP exchange rates:

- 2016 rok: 1 EUR = 4,3625 PLN
- 2017 rok: 1 EUR = 4,2576 PLN
- 2018 rok: 1 EUR = 4,2623 PLN
- 2019 rok: 1 EUR = 4,2980 PLN
- 2020 rok: 1 EUR = 4,4448 PLN
- 2021 rok: 1 EUR = 4,5674 PLN





## Conditions of sale

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## Contact

Centrum Analiz Branżowych  
ul. Turmoncka 22/110  
03-254 Warszawa  
[www.cab-badania.pl](http://www.cab-badania.pl)  
[www.cab-badania.com](http://www.cab-badania.com)

**Maciej Pastor**



Phone: +48 797 940 910

E-mail: [m.pastor@cab-badania.pl](mailto:m.pastor@cab-badania.pl)

**Barbara Lau**



Phone: +48 722 330 255

E-mail: [b.lau@cab-badania.pl](mailto:b.lau@cab-badania.pl)

**Justyna Hennig**



Phone: +48 661 010 818

E-mail: [justyna.hennig@cab-badania.pl](mailto:justyna.hennig@cab-badania.pl)

