

Brazil Ceramic Tiles - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

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Report description:

The Brazil Ceramic Tiles Market size is estimated at USD 4.26 billion in 2024, and is expected to reach USD 5.19 billion by 2029, growing at a CAGR of 4.02% during the forecast period (2024-2029).

The rapid COVID-19 outbreak caused several obstacles for the Brazilian ceramic tile sector in 2020. However, COVID-19 also negatively affected the construction industry, which is the primary market for ceramic tiles. In 2020, Brazil, one of the major players in the world's ceramics industry, also had to deal with the pandemic consequences. The temporary closure of industrial plants in the first months of the year inevitably resulted in a drop in tile production, which fell to 840 million sq m (-7.6% from the previous year). Exports also decreased to 94 million sq m (-5.7% in 2019), despite the 5 million sq m sold on the US market (25 million sq m, +25%). Overall, Brazilian tile producers ended the year with an increase in total sales, which rose to 920 million sq m (+2.7%), thanks to a rebound in demand on the domestic market in the second half of the year. By the end of 2020, domestic sales had increased by 3.8% more than in 2019.

The Brazil ceramic tiles market is expected to witness strong growth in the forecast period owing to increasing construction activity and a rise in the country's residential and commercial real estate activities. Furthermore, rising disposable incomes and a preference for stylish homes are driving up demand for premium ceramic tiles. Brazil is currently the third-largest ceramic tiles producer in the world. An important characteristic of the Brazilian domestic ceramic tiles market is that importing ceramic tiles is practically insignificant. Brazil exports ceramic tiles to more than 121 countries, with some major regions being the United States, South Africa, and Latin America. Investments were also quickly resumed. The sector focused primarily on improving its product mix and using more sustainable materials and processes to add value to its offerings and boost global market competitiveness. Brazil is also developing government programs such as the Minha Casa Minha Vida program to increase residential activity. It is anticipated to boost the real estate market in the country and will open further growth opportunities for ceramic tiles.

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Brazil Ceramic Tiles Market Trends

Rising in Construction Industry in Brazil is Driving the Market

Ceramic tiles demand is primarily driven by the Brazilian construction industry, as the material is widely used in both commercial and residential applications. Because ceramic tiles are so inexpensive, the construction industry is rapidly expanding in the market. Ceramic tiles are popular in homes and businesses because they are long-lasting and do not break easily. Demand for ceramic tile is influenced by business operations, construction projects, and real estate investment.

For instance, in October 2022, Scala, the Latin American data center firm, announced that it is planning to launch a new facility in Brazil. Located in Avenida Pernambuco, the data center facility will be constructed with an investment of US\$48 million and will have a capacity of 7.2 MW. Construction activities are currently ongoing and the project is slated for completion in Q2 2023.

Moreover, in Brazil, the government programs such as Minha Casa Minha Vida (MCMV), Plano Decenal de Expansão de Energia 2026, and the National Education Plan are expected to support industry growth over the forecast period.

Ceramic Tile Consumption and Export in Brazil is Driving the Market

Brazil is one of the world's major ceramic tile consumers, ranking second in consumption. In 2021, 1.04 billion square meters were produced out of an installed capacity of 1.171 billion square meters. Total sales reached 1.03 billion square meters, with 901.9 million m² sold in the domestic market and 130.3 million m² exported.

Ceramic tiles are one of the oldest decorative art forms. Because of their durability, technical properties, and visual richness, they are widely used in conjunction with architecture. Ceramic tiles are popular in colonial Brazil's residential and commercial sectors. They protect from humidity, are easy to clean, and provide a good thermal environment when used on facades. Beautiful examples of ceramic tiles are present throughout the country, particularly in the north and northeast.

Because of the country's significant increase in housing units in recent years, home decoration tile consumption, primarily used on the living room, kitchen, and bathroom walls, increased significantly.

Furthermore, with a greater concentration in the Southeast and South regions and an expansion in the country's northeast. A productive segment with primarily national capital, it is also a significant job creator, with approximately 28 thousand direct jobs and approximately 200 thousand indirect jobs. The use of two distinct processes in its industrial park is a typical feature of Brazilian production: dry method and wet method. Brazilian ceramic tile manufacturers use the most advanced technology available and adhere to international quality standards.

Brazil Ceramic Tiles Industry Overview

The Brazilian ceramic tiles market is competitive and fragmented. Some of the major players in the market are Cedasa, Carmelo Fior, Grupo Fragnani, Elizabeth, and Portobello, among others. The companies are investing significantly in new technologies to produce innovative materials and improve process and production cost management efficiency. Furthermore, with technological advancement and product innovation, mid-size to smaller companies are increasing their market presence by securing new contracts and tapping new markets.

Additional Benefits:

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- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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