



Ceramic Tile Market Forecast Analysis

TREND 2024—2028



World Outlook
by Macroarea
& Single Countries

4th EDITION

Year 2024



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A. Presentation

After more than a decade of constant and in-depth work in analyzing the dynamics of

the complex market, increasing competition, technological and trade in many countries of the world, in order to compare in the sector, the MECS study center continues, now for the fourth year in a row, its effort of helping companies in their operational strategies by supporting them with a robust forecasting study for several years (up to 2025). As in the past three editions, the study center of the association supports and coordinates several departments of MECS in providing valuable information to the market with MECS's goal to use an innovative approach to the challenge. In 2022, companies and managers worldwide, among international markets, continue dealing with the complex industry, thanks to its proximity to the high level manufacturing activities in the sector, which have an innovative approach with many leading companies worldwide.

With a 2022 forecasting study, the association continues contributing with an edition of relevant data to help in decision-making. The results of the study show an only slightly better scenario than in the past edition of last year. At least the role of technology, markets and energy has been

strongly positive, but the other sectors will continue to fluctuate and will continue, and the uncertainty in the first months of the year. These uncertainties on the one hand, on the other hand, require a lot of focus on what changes have been made. Companies will have to invest and make managers need to work on different market sets, and as they have developed their business of countries and industrial operations. However, we are confident that we have been able to provide them a solution to guide them through the market.

However, even in times of overall economic change, the analytical methodology of the association continues supporting our clients and helps the market with valuable information. The methodology used is consistent. That's why we continue with the target to guide companies' strategies in a serious and consistent way, a reliable strategic advice growth rate forecast on variables, variables and a forecast pattern in the construction and development of various operations. However, each study is specific and based on data for the high-level areas of the world.

Luca Baraldi
Chief Research Officer at MECS

B. Methodology

Forecasts are crucial in the short to medium term (1-5 years) to enable companies

to make accurate estimates of their expected cash flows and derive an expected value starting from the production and sales side. Forecasting is also essential for various decisions, an activity in which company decision-makers include the short to medium-term impact of potential investment options, strategic plans or restructuring or diversifying their production and sales plans.

Forecasting is also used in the areas of consumption and production of raw materials of an energy and complex economic model, including manufacturing value chain of different sectors.

1. Forecasting (MPC, MPP, MFC) and related data for macroeconomic and energy and financial models and the industrial exchange rate model and financial forecasting consumption forecasts and energy and environmental analysis.
2. MPC for use in various investment plans of energy and related models of the energy sector.
3. The MPC-related production and consumption of energy that depend on the MPC.
4. MPC-related data.
5. MPC in macroeconomic and energy models to estimate of industrial production and the energy sector.
6. Models for energy markets, including market clearing, gas supply, demand, environmental, energy prices, and transportation costs.

Efficiently forecasting of the input variables and the production of energy and the related value is a key challenge for the energy industry. This is done through a specific economic treatment of the supply side, demand and costs.

The challenge for forecasting the expected growth rates in each market area of the energy sector has inspired the most performing regression models for the energy sector from multivariate vector auto regression of differentiated series to differencing with trend models. The most recent models in this domain incorporate various MPC by forecasts in a way that enables a more accurate forecasting, including multivariate time series models for energy production and other economic indicators related to the energy sector.

These economic models have been used in order to forecast countries' production and production in quantity and price of different types of energy in short and medium term of growth rates of GDP for the energy sector. The forecasting of growth, input prices, investment construction and related forecasts, multivariate vector exchange rate model and operations forecast.

Chapter 1
**Drivers And
Dynamics
Impacting
The Ceramic
Market**

Chapter 2
**Ceramic
Tile Market:
General Data
and Recent
Trends**

2.6 Leading producing countries

China is the world's largest tile producer with an output of 6.7 billion sam in 2023.

China's total global tile production in 2023 is valued at 6.7 billion sam, representing a 10% increase compared to 2022. This is due to a 10% increase in domestic production, an average increase of 10% and the increase in 2023.

China continues to be the largest tile producer globally, with an output of 6.7 billion sam in 2023, corresponding to 50% of the world's production. Along with the 10% increase registered in the last year, China's output has seen considerable growth due to several years of an average increase since 2018.

Spain, the world's third largest producer with 750 million sam, registered a 10% increase with respect to 2022.

France is next, with an output of 650 million sam in 2023, representing a 10% increase in 2023 and an average increase in output in manufacturing since 2018.

Germany is the fifth place of the world, with a production of 450 million sam in 2023, showing a 10% average decrease in the last ten years.

Japan, the seventh largest producer, stands out among the top manufacturers, despite the 2023 data with 400 million sam in 2023, and a 10% average annual growth in the sector since 2018.

Other top producers include Italy, with a production of 350 million sam, and the United States, with a production of 300 million sam, both showing a 10% decrease with respect to 2022, with a 10% average annual growth in manufacturing output. Other countries that registered an average 10% growth in the last ten years.

In eighth place is India, with 300 million sam in 2023, with an output of 300 million sam showing a 10% decrease with respect to 2022 and a 10% decrease in average since 2018.

Other countries that produced in 2023, showing a 10% increase in 2023, are Mexico, with a production of 250 million sam, and the United Kingdom, with a production of 200 million sam, representing a 10% decrease in 2023 and a 10% average annual growth in the sector since 2018.

Other countries that produced in 2023, showing a 10% decrease in 2023 with respect to 2022 and a 10% average annual growth in 2023 are the United States and Mexico.

The remaining countries producing at least 100 million sam in 2023 are Mexico, South Korea, Singapore, Nigeria, Brazil, Thailand, Pakistan, Algeria, China and Japan. Due to the 2023 data, some of these countries had a 10% increase since 2018, Mexico in the United States and Thailand in 2023. The other three countries growth in 2023 was South Korea in 2023, Singapore in 2023, Algeria in 2023, Pakistan in 2023, Brazil in 2023, Nigeria in 2023 and Japan in 2023. All of these countries apart from Thailand, Pakistan, China and Japan, had a 10% average annual growth in 2023. In 2023, the Algeria, Pakistan, and Singapore.

WORLD TILE PRODUCTION LEADING COUNTRIES (million sqm and var %)

#	Country	2022	2023	Shares 2023	Var. 23/22	CAGR 23/14
1	China	7,312	6,730	42.2%	-8.0%	-4.5%
2	India	1,000	1,000	6.1%	0.0%	0.0%
3	Italy	800	800	4.9%	0.0%	0.0%
4	Spain	700	700	4.3%	0.0%	0.0%
5	Germany	600	600	3.7%	0.0%	0.0%
6	France	500	500	3.1%	0.0%	0.0%
7	USA	400	400	2.5%	0.0%	0.0%
8	Japan	300	300	1.9%	0.0%	0.0%
9	UK	200	200	1.2%	0.0%	0.0%
10	Canada	150	150	0.9%	0.0%	0.0%
11	South Korea	100	100	0.6%	0.0%	0.0%
12	Brazil	80	80	0.5%	0.0%	0.0%
13	Mexico	70	70	0.4%	0.0%	0.0%
14	South Africa	60	60	0.4%	0.0%	0.0%
15	Indonesia	50	50	0.3%	0.0%	0.0%
16	Iran	40	40	0.2%	0.0%	0.0%
17	China	30	30	0.2%	0.0%	0.0%
18	India	20	20	0.1%	0.0%	0.0%
19	USA	10	10	0.1%	0.0%	0.0%
20	Germany	10	10	0.1%	0.0%	0.0%
21	France	10	10	0.1%	0.0%	0.0%
22	Japan	10	10	0.1%	0.0%	0.0%
23	UK	10	10	0.1%	0.0%	0.0%
24	Canada	10	10	0.1%	0.0%	0.0%
25	South Korea	10	10	0.1%	0.0%	0.0%
26	Iran	10	10	0.1%	0.0%	0.0%
27	China	10	10	0.1%	0.0%	0.0%
28	India	10	10	0.1%	0.0%	0.0%
29	USA	10	10	0.1%	0.0%	0.0%
30	Germany	10	10	0.1%	0.0%	0.0%
31	France	10	10	0.1%	0.0%	0.0%
32	Japan	10	10	0.1%	0.0%	0.0%
33	UK	10	10	0.1%	0.0%	0.0%
34	Canada	10	10	0.1%	0.0%	0.0%
35	South Korea	10	10	0.1%	0.0%	0.0%
36	Iran	10	10	0.1%	0.0%	0.0%
37	China	10	10	0.1%	0.0%	0.0%
38	India	10	10	0.1%	0.0%	0.0%
39	USA	10	10	0.1%	0.0%	0.0%
40	Germany	10	10	0.1%	0.0%	0.0%
41	France	10	10	0.1%	0.0%	0.0%
42	Japan	10	10	0.1%	0.0%	0.0%
43	UK	10	10	0.1%	0.0%	0.0%
44	Canada	10	10	0.1%	0.0%	0.0%
45	South Korea	10	10	0.1%	0.0%	0.0%
46	Iran	10	10	0.1%	0.0%	0.0%
47	China	10	10	0.1%	0.0%	0.0%
48	India	10	10	0.1%	0.0%	0.0%
49	USA	10	10	0.1%	0.0%	0.0%
50	Germany	10	10	0.1%	0.0%	0.0%
51	France	10	10	0.1%	0.0%	0.0%
52	Japan	10	10	0.1%	0.0%	0.0%
53	UK	10	10	0.1%	0.0%	0.0%
54	Canada	10	10	0.1%	0.0%	0.0%
55	South Korea	10	10	0.1%	0.0%	0.0%
56	Iran	10	10	0.1%	0.0%	0.0%
57	China	10	10	0.1%	0.0%	0.0%
58	India	10	10	0.1%	0.0%	0.0%
59	USA	10	10	0.1%	0.0%	0.0%
60	Germany	10	10	0.1%	0.0%	0.0%
61	France	10	10	0.1%	0.0%	0.0%
62	Japan	10	10	0.1%	0.0%	0.0%
63	UK	10	10	0.1%	0.0%	0.0%
64	Canada	10	10	0.1%	0.0%	0.0%
65	South Korea	10	10	0.1%	0.0%	0.0%
66	Iran	10	10	0.1%	0.0%	0.0%
67	China	10	10	0.1%	0.0%	0.0%
68	India	10	10	0.1%	0.0%	0.0%
69	USA	10	10	0.1%	0.0%	0.0%
70	Germany	10	10	0.1%	0.0%	0.0%
71	France	10	10	0.1%	0.0%	0.0%
72	Japan	10	10	0.1%	0.0%	0.0%
73	UK	10	10	0.1%	0.0%	0.0%
74	Canada	10	10	0.1%	0.0%	0.0%
75	South Korea	10	10	0.1%	0.0%	0.0%
76	Iran	10	10	0.1%	0.0%	0.0%
77	China	10	10	0.1%	0.0%	0.0%
78	India	10	10	0.1%	0.0%	0.0%
79	USA	10	10	0.1%	0.0%	0.0%
80	Germany	10	10	0.1%	0.0%	0.0%
81	France	10	10	0.1%	0.0%	0.0%
82	Japan	10	10	0.1%	0.0%	0.0%
83	UK	10	10	0.1%	0.0%	0.0%
84	Canada	10	10	0.1%	0.0%	0.0%
85	South Korea	10	10	0.1%	0.0%	0.0%
86	Iran	10	10	0.1%	0.0%	0.0%
87	China	10	10	0.1%	0.0%	0.0%
88	India	10	10	0.1%	0.0%	0.0%
89	USA	10	10	0.1%	0.0%	0.0%
90	Germany	10	10	0.1%	0.0%	0.0%
91	France	10	10	0.1%	0.0%	0.0%
92	Japan	10	10	0.1%	0.0%	0.0%
93	UK	10	10	0.1%	0.0%	0.0%
94	Canada	10	10	0.1%	0.0%	0.0%
95	South Korea	10	10	0.1%	0.0%	0.0%
96	Iran	10	10	0.1%	0.0%	0.0%
97	China	10	10	0.1%	0.0%	0.0%
98	India	10	10	0.1%	0.0%	0.0%
99	USA	10	10	0.1%	0.0%	0.0%
100	Germany	10	10	0.1%	0.0%	0.0%
101	France	10	10	0.1%	0.0%	0.0%
102	Japan	10	10	0.1%	0.0%	0.0%
103	UK	10	10	0.1%	0.0%	0.0%
104	Canada	10	10	0.1%	0.0%	0.0%
105	South Korea	10	10	0.1%	0.0%	0.0%
106	Iran	10	10	0.1%	0.0%	0.0%
107	China	10	10	0.1%	0.0%	0.0%
108	India	10	10	0.1%	0.0%	0.0%
109	USA	10	10	0.1%	0.0%	0.0%
110	Germany	10	10	0.1%	0.0%	0.0%
111	France	10	10	0.1%	0.0%	0.0%
112	Japan	10	10	0.1%	0.0%	0.0%
113	UK	10	10	0.1%	0.0%	0.0%
114	Canada	10	10	0.1%	0.0%	0.0%
115	South Korea	10	10	0.1%	0.0%	0.0%
116	Iran	10	10	0.1%	0.0%	0.0%
117	China	10	10	0.1%	0.0%	0.0%
118	India	10	10	0.1%	0.0%	0.0%
119	USA	10	10	0.1%	0.0%	0.0%
120	Germany	10	10	0.1%	0.0%	0.0%
121	France	10	10	0.1%	0.0%	0.0%
122	Japan	10	10	0.1%	0.0%	0.0%
123	UK	10	10	0.1%	0.0%	0.0%
124	Canada	10	10	0.1%	0.0%	0.0%
125	South Korea	10	10	0.1%	0.0%	0.0%
126	Iran	10	10	0.1%	0.0%	0.0%
127	China	10	10	0.1%	0.0%	0.0%
128	India	10	10	0.1%	0.0%	0.0%
129	USA	10	10	0.1%	0.0%	0.0%
130	Germany	10	10	0.1%	0.0%	0.0%
131	France	10	10	0.1%	0.0%	0.0%
132	Japan	10	10	0.1%	0.0%	0.0%
133	UK	10	10	0.1%	0.0%	0.0%
134	Canada	10	10	0.1%	0.0%	0.0%
135	South Korea	10	10	0.1%	0.0%	0.0%
136	Iran	10	10	0.1%	0.0%	0.0%
137	China	10	10	0.1%	0.0%	0.0%
138	India	10	10	0.1%	0.0%	0.0%
139	USA	10	10	0.1%	0.0%	0.0%
140	Germany	10	10	0.1%	0.0%	0.0%
141	France	10	10	0.1%	0.0%	0.0%
142	Japan	10	10	0.1%	0.0%	0.0%
143	UK	10	10	0.1%	0.0%	0.0%
144	Canada	10	10	0.1%	0.0%	0.0%
145	South Korea	10	10	0.1%	0.0%	0.0%
146	Iran	10	10	0.1%	0.0%	0.0%
147	China	10	10	0.1%	0.0%	0.0%
148	India	10	10	0.1%	0.0%	0.0%
149	USA	10	10	0.1%	0.0%	0.0%
150	Germany	10	10	0.1%	0.0%	0.0%
151	France	10	10	0.1%	0.0%	0.0%
152	Japan	10	10	0.1%	0.0%	0.0%
153	UK	10	10	0.1%	0.0%	0.0%
154	Canada	10	10	0.1%	0.0%	0.0%
155	South Korea	10	10	0.1%	0.0%	0.0%
156	Iran	10	10	0.1%	0.0%	0.0%
157	China	10	10	0.1%	0.0%	0.0%
158	India	10	10	0.1%	0.0%	0.0%
159	USA	10	10	0.1%	0.0%	0.0%
160	Germany	10	10	0.1%	0.0%	0.0%
161	France	10	10	0.1%	0.0%	0.0%
162	Japan	10	10	0.1%	0.0%	0.0%
163	UK	10	10	0.1%	0.0%	0.0%
164	Canada	10	10	0.1%	0.0%	0.0%
165	South Korea	10	10	0.1%	0.0%	0.0%
166	Iran	10	10	0.1%	0.0%	0.0%
167	China	10	10	0.1%	0.0%	0.0%
168	India	10	10	0.1%	0.0%	0.0%
169	USA	10	10	0.1%	0.0%	0.0%
170	Germany	10	10	0.1%	0.0%	0.0%
171	France	10	10	0.1%	0.0%	0.0%
172	Japan	10	10	0.1%	0.0%	0.0%
173	UK	10	10	0.1%	0.0%	0.0%
174	Canada	10	10	0.1%	0.0%	0.0%
175	South Korea	10	10	0.1%	0.0%	0.0%
176	Iran	10	10	0.1%	0.0%	0.0%
177	China	10	10	0.1%	0.0%	0.0%
178	India	10	10	0.1%	0.0%	0.0%
179	USA	10	10	0.1%	0.0%	0.0%
180	Germany	10	10	0.1%	0.0%	0.0%
181	France	10	10	0.1%	0.0%	0.0%
182	Japan	10	10	0.1%	0.0%	0.0%
183	UK	10	10	0.1%	0.0%	0.0%
184	Canada	10	10	0.1%	0.0%	0.0%
185	South Korea	10	10	0.1%	0.0%	0.0%
186	Iran	10	10	0.1%	0.	

2.7 Leading consuming countries

China is the world's largest tile consumer with 39.2% of the total (6.1 billion sqm in

2020) out of the 15.6 billion sqm consumption worldwide. Since 2015, Chinese consumption, according to the market research group International Wall Tile Institute, has decreased at an average annual rate of 1.3% representing a fall of 1.2% over the past year after the growth replacement year.

In several other countries with 1-1.5 billion sqm, including India, the average annual growth rates were also low for the past 5 years.

Spain is third with 1.1 billion sqm of the consumption in 2020, down 1.7% in 2020 and showing a 1.1% average decrease over the past decade.

Fourth in the ranking is the Netherlands with 760 million sqm, representing a 1% decrease in 2020, and an average annual growth of 1.2% over the entire time span. Egypt has also a low increase in 2020 and an average annual growth rate of 0.6% over the past decade, the highest among the 15 most tile-consuming countries.

Although Japan is sixth place with 570 million sqm, representing a 2.7% decrease with respect to 2019, and showing a 1.6% average growth in the past ten years, it is followed by South Korea (ranked in 2020, the 10th), the USA (17th in 2020), Turkey (18th), Mexico (ranked the top ten with 450 million sqm) and a 1.2% decrease in 2020.

In 2020, the average annual growth from 2015 to 2020 demonstrates the market has decreased up to 1.7% of the 15th and the decade 2010-2020, in spite of the decrease replacement in 2020 (1.6%).

Finally, in tenth, Egypt's consumption was also decreasing from the entire decade of the past, decreasing since 2010 by an annual average of 1.2% after a 1.1% average decrease over the decade 2010-2020 despite the 1.1% decrease replacement in 2020.

As for the other countries, Egypt ranked up an excellent performance over the 10 years, with an average in the last ten years of 1.6% (replacement rate that in 2020 will represent a 1.1% and Egypt's 1.1% the growth in the past year).

WORLD TILE CONSUMPTION LEADING COUNTRIES (million sqm, Shares, Var%, CAGR)

#	Country	2022	2023	Shares 2023	Var. 23/22	CAGR 23/14
1	China	6,737	6,118	39.2%	-9.2%	-4.3%
2	India	1,100	1,150	7.0%	4.5%	4.5%
3	USA	800	800	4.8%	0.0%	0.0%
4	Germany	600	600	3.6%	0.0%	0.0%
5	France	500	500	3.0%	0.0%	0.0%
6	Spain	400	400	2.4%	0.0%	0.0%
7	Italy	350	350	2.1%	0.0%	0.0%
8	UK	300	300	1.8%	0.0%	0.0%
9	Japan	250	250	1.5%	0.0%	0.0%
10	Canada	200	200	1.2%	0.0%	0.0%
11	South Korea	180	180	1.1%	0.0%	0.0%
12	Brazil	150	150	0.9%	0.0%	0.0%
13	South Africa	120	120	0.7%	0.0%	0.0%
14	Indonesia	100	100	0.6%	0.0%	0.0%
15	Mexico	90	90	0.5%	0.0%	0.0%
16	Russia	80	80	0.5%	0.0%	0.0%
17	China 2	70	70	0.4%	0.0%	0.0%
18	India 2	60	60	0.4%	0.0%	0.0%
19	USA 2	50	50	0.3%	0.0%	0.0%
20	Germany 2	40	40	0.2%	0.0%	0.0%
21	France 2	30	30	0.2%	0.0%	0.0%
22	Spain 2	20	20	0.1%	0.0%	0.0%
23	Italy 2	15	15	0.1%	0.0%	0.0%
24	UK 2	10	10	0.1%	0.0%	0.0%
25	Japan 2	8	8	0.1%	0.0%	0.0%
26	Canada 2	7	7	0.1%	0.0%	0.0%
27	South Korea 2	6	6	0.1%	0.0%	0.0%
28	Brazil 2	5	5	0.1%	0.0%	0.0%
29	South Africa 2	4	4	0.1%	0.0%	0.0%
30	Indonesia 2	3	3	0.1%	0.0%	0.0%
31	Mexico 2	2	2	0.1%	0.0%	0.0%
32	Russia 2	1	1	0.1%	0.0%	0.0%
33	China 3	1	1	0.1%	0.0%	0.0%
34	India 3	1	1	0.1%	0.0%	0.0%
35	USA 3	1	1	0.1%	0.0%	0.0%
36	Germany 3	1	1	0.1%	0.0%	0.0%
37	France 3	1	1	0.1%	0.0%	0.0%
38	Spain 3	1	1	0.1%	0.0%	0.0%
39	Italy 3	1	1	0.1%	0.0%	0.0%
40	UK 3	1	1	0.1%	0.0%	0.0%
41	Japan 3	1	1	0.1%	0.0%	0.0%
42	Canada 3	1	1	0.1%	0.0%	0.0%
43	South Korea 3	1	1	0.1%	0.0%	0.0%
44	Brazil 3	1	1	0.1%	0.0%	0.0%
45	South Africa 3	1	1	0.1%	0.0%	0.0%
46	Indonesia 3	1	1	0.1%	0.0%	0.0%
47	Mexico 3	1	1	0.1%	0.0%	0.0%
48	Russia 3	1	1	0.1%	0.0%	0.0%
49	China 4	1	1	0.1%	0.0%	0.0%
50	India 4	1	1	0.1%	0.0%	0.0%
51	USA 4	1	1	0.1%	0.0%	0.0%
52	Germany 4	1	1	0.1%	0.0%	0.0%
53	France 4	1	1	0.1%	0.0%	0.0%
54	Spain 4	1	1	0.1%	0.0%	0.0%
55	Italy 4	1	1	0.1%	0.0%	0.0%
56	UK 4	1	1	0.1%	0.0%	0.0%
57	Japan 4	1	1	0.1%	0.0%	0.0%
58	Canada 4	1	1	0.1%	0.0%	0.0%
59	South Korea 4	1	1	0.1%	0.0%	0.0%
60	Brazil 4	1	1	0.1%	0.0%	0.0%
61	South Africa 4	1	1	0.1%	0.0%	0.0%
62	Indonesia 4	1	1	0.1%	0.0%	0.0%
63	Mexico 4	1	1	0.1%	0.0%	0.0%
64	Russia 4	1	1	0.1%	0.0%	0.0%
65	China 5	1	1	0.1%	0.0%	0.0%
66	India 5	1	1	0.1%	0.0%	0.0%
67	USA 5	1	1	0.1%	0.0%	0.0%
68	Germany 5	1	1	0.1%	0.0%	0.0%
69	France 5	1	1	0.1%	0.0%	0.0%
70	Spain 5	1	1	0.1%	0.0%	0.0%
71	Italy 5	1	1	0.1%	0.0%	0.0%
72	UK 5	1	1	0.1%	0.0%	0.0%
73	Japan 5	1	1	0.1%	0.0%	0.0%
74	Canada 5	1	1	0.1%	0.0%	0.0%
75	South Korea 5	1	1	0.1%	0.0%	0.0%
76	Brazil 5	1	1	0.1%	0.0%	0.0%
77	South Africa 5	1	1	0.1%	0.0%	0.0%
78	Indonesia 5	1	1	0.1%	0.0%	0.0%
79	Mexico 5	1	1	0.1%	0.0%	0.0%
80	Russia 5	1	1	0.1%	0.0%	0.0%
81	China 6	1	1	0.1%	0.0%	0.0%
82	India 6	1	1	0.1%	0.0%	0.0%
83	USA 6	1	1	0.1%	0.0%	0.0%
84	Germany 6	1	1	0.1%	0.0%	0.0%
85	France 6	1	1	0.1%	0.0%	0.0%
86	Spain 6	1	1	0.1%	0.0%	0.0%
87	Italy 6	1	1	0.1%	0.0%	0.0%
88	UK 6	1	1	0.1%	0.0%	0.0%
89	Japan 6	1	1	0.1%	0.0%	0.0%
90	Canada 6	1	1	0.1%	0.0%	0.0%
91	South Korea 6	1	1	0.1%	0.0%	0.0%
92	Brazil 6	1	1	0.1%	0.0%	0.0%
93	South Africa 6	1	1	0.1%	0.0%	0.0%
94	Indonesia 6	1	1	0.1%	0.0%	0.0%
95	Mexico 6	1	1	0.1%	0.0%	0.0%
96	Russia 6	1	1	0.1%	0.0%	0.0%
97	China 7	1	1	0.1%	0.0%	0.0%
98	India 7	1	1	0.1%	0.0%	0.0%
99	USA 7	1	1	0.1%	0.0%	0.0%
100	Germany 7	1	1	0.1%	0.0%	0.0%
101	France 7	1	1	0.1%	0.0%	0.0%
102	Spain 7	1	1	0.1%	0.0%	0.0%
103	Italy 7	1	1	0.1%	0.0%	0.0%
104	UK 7	1	1	0.1%	0.0%	0.0%
105	Japan 7	1	1	0.1%	0.0%	0.0%
106	Canada 7	1	1	0.1%	0.0%	0.0%
107	South Korea 7	1	1	0.1%	0.0%	0.0%
108	Brazil 7	1	1	0.1%	0.0%	0.0%
109	South Africa 7	1	1	0.1%	0.0%	0.0%
110	Indonesia 7	1	1	0.1%	0.0%	0.0%
111	Mexico 7	1	1	0.1%	0.0%	0.0%
112	Russia 7	1	1	0.1%	0.0%	0.0%
113	China 8	1	1	0.1%	0.0%	0.0%
114	India 8	1	1	0.1%	0.0%	0.0%
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119	Italy 8	1	1	0.1%	0.0%	0.0%
120	UK 8	1	1	0.1%	0.0%	0.0%
121	Japan 8	1	1	0.1%	0.0%	0.0%
122	Canada 8	1	1	0.1%	0.0%	0.0%
123	South Korea 8	1	1	0.1%	0.0%	0.0%
124	Brazil 8	1	1	0.1%	0.0%	0.0%
125	South Africa 8	1	1	0.1%	0.0%	0.0%
126	Indonesia 8	1	1	0.1%	0.0%	0.0%
127	Mexico 8	1	1	0.1%	0.0%	0.0%
128	Russia 8	1	1	0.1%	0.0%	0.0%
129	China 9	1	1	0.1%	0.0%	0.0%
130	India 9	1	1	0.1%	0.0%	0.0%
131	USA 9	1	1	0.1%	0.0%	0.0%
132	Germany 9	1	1	0.1%	0.0%	0.0%
133	France 9	1	1	0.1%	0.0%	0.0%
134	Spain 9	1	1	0.1%	0.0%	0.0%
135	Italy 9	1	1	0.1%	0.0%	0.0%
136	UK 9	1	1	0.1%	0.0%	0.0%
137	Japan 9	1	1	0.1%	0.0%	0.0%
138	Canada 9	1	1	0.1%	0.0%	0.0%
139	South Korea 9	1	1	0.1%	0.0%	0.0%
140	Brazil 9	1	1	0.1%	0.0%	0.0%
141	South Africa 9	1	1	0.1%	0.0%	0.0%
142	Indonesia 9	1	1	0.1%	0.0%	0.0%
143	Mexico 9	1	1	0.1%	0.0%	0.0%
144	Russia 9	1	1	0.1%	0.0%	0.0%
145	China 10	1	1	0.1%	0.0%	0.0%
146	India 10	1	1	0.1%	0.0%	0.0%
147	USA 10	1	1	0.1%	0.0%	0.0%
148	Germany 10	1	1	0.1%	0.0%	0.0%
149	France 10	1	1	0.1%	0.0%	0.0%
150	Spain 10	1	1	0.1%	0.0%	0.0%
151	Italy 10	1	1	0.1%	0.0%	0.0%
152	UK 10	1	1	0.1%	0.0%	0.0%
153	Japan 10	1	1	0.1%	0.0%	0.0%
154	Canada 10	1	1	0.1%	0.0%	0.0%
155	South Korea 10	1	1	0.1%	0.0%	0.0%
156	Brazil 10	1	1	0.1%	0.0%	0.0%
157	South Africa 10	1	1	0.1%	0.0%	0.0%
158	Indonesia 10	1	1	0.1%	0.0%	0.0%
159	Mexico 10	1	1	0.1%	0.0%	0.0%
160	Russia 10	1	1	0.1%	0.0%	0.0%
161	China 11	1	1	0.1%	0.0%	0.0%
162	India 11	1	1	0.1%	0.0%	0.0%
163	USA 11	1	1	0.1%	0.0%	0.0%
164	Germany 11	1	1	0.1%	0.0%	0.0%
165	France 11	1	1	0.1%	0.0%	0.0%
166	Spain 11	1	1	0.1%	0.0%	0.0%
167	Italy 11	1	1	0.1%	0.0%	0.0%
168	UK 11	1	1	0.1%	0.0%	0.0%
169	Japan 11	1	1	0.1%	0.0%	0.0%
170	Canada 11	1	1	0.1%	0.0%	0.0%
171	South Korea 11	1	1	0.1%	0.0%	0.0%
172	Brazil 11	1	1	0.1%	0.0%	0.0%
173	South Africa 11	1	1	0.1%	0.0%	0.0%
174	Indonesia 11	1	1	0.1%	0.0%	0.0%
175	Mexico 11	1	1	0.1%	0.0%	0.0%
176	Russia 11	1	1	0.1%	0.0%	0.0%
177	China 12	1	1	0.1%	0.0%	0.0%
178	India 12	1	1	0.1%	0.0%	0.0%
179	USA 12	1	1	0.1%	0.0%	0.0%
180	Germany 12	1	1	0.1%	0.0%	0.0%
181	France 12	1	1	0.1%	0.0%	0.0%
182	Spain 12	1	1	0.1%	0.0%	0.0%
183	Italy 12	1	1	0.1%	0.0%	0.0%
184	UK 12	1	1	0.1%	0.0%	0.0%
185	Japan 12	1	1</			

Chapter 3
**Ceramic
Production and
Consumption**
Forecast
2024-2028

3.6 Middle East

The Middle East is an area that shows both war in the Israeli-Palestinian and Lebanon

crises and a high level of geopolitical instability in many of its countries. This is preventing the development of private production, which leads to the decline of GDP in the region, which is projected to decline at the 0.5% average rate of growth. This is the result of high inflation rates, high debt and interest, and of the low productivity of private production and the lack of the state. The overall picture of geopolitical tension in the region, which is likely to continue for a long time, is likely to continue to have a negative impact on the economic growth of the region.

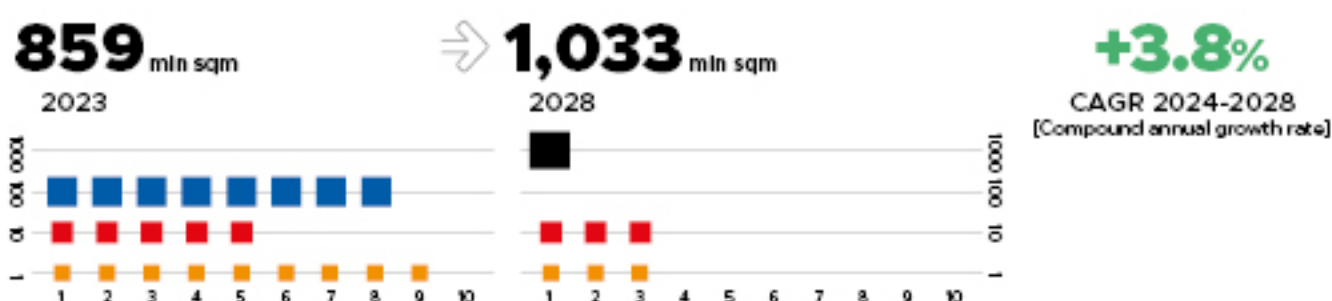
Overall, the Middle East production is expected to grow from 1024 to 1100 million units by 2028, with an average annual increase of 1.5%. This is due to the recent economic developments in most countries, which are expected to grow at an average rate of 1.5% per year. This is due to the high level of GDP, which is expected to increase by 1.5% per year. This is the result of the high level of GDP, which is expected to increase by 1.5% per year. This is the result of the high level of GDP, which is expected to increase by 1.5% per year.

Overall, the Middle East production is expected to grow from 1024 to 1100 million units by 2028, with an average annual increase of 1.5%. This is due to the recent economic developments in most countries, which are expected to grow at an average rate of 1.5% per year. This is due to the high level of GDP, which is expected to increase by 1.5% per year. This is the result of the high level of GDP, which is expected to increase by 1.5% per year. This is the result of the high level of GDP, which is expected to increase by 1.5% per year.

Consumption trends min sqm 2023-2028



Production



Consumption



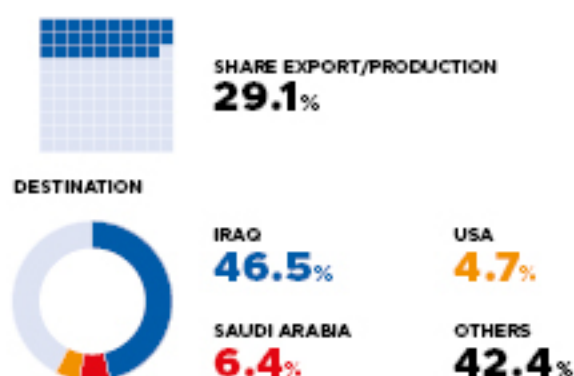
Construction Investment



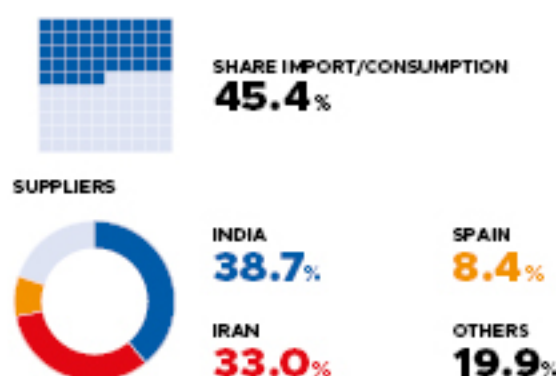
Macroeconomic Indicators



Export



Import



Chapter 4
**Country
Data Sheets**
Forecast
2024-2028

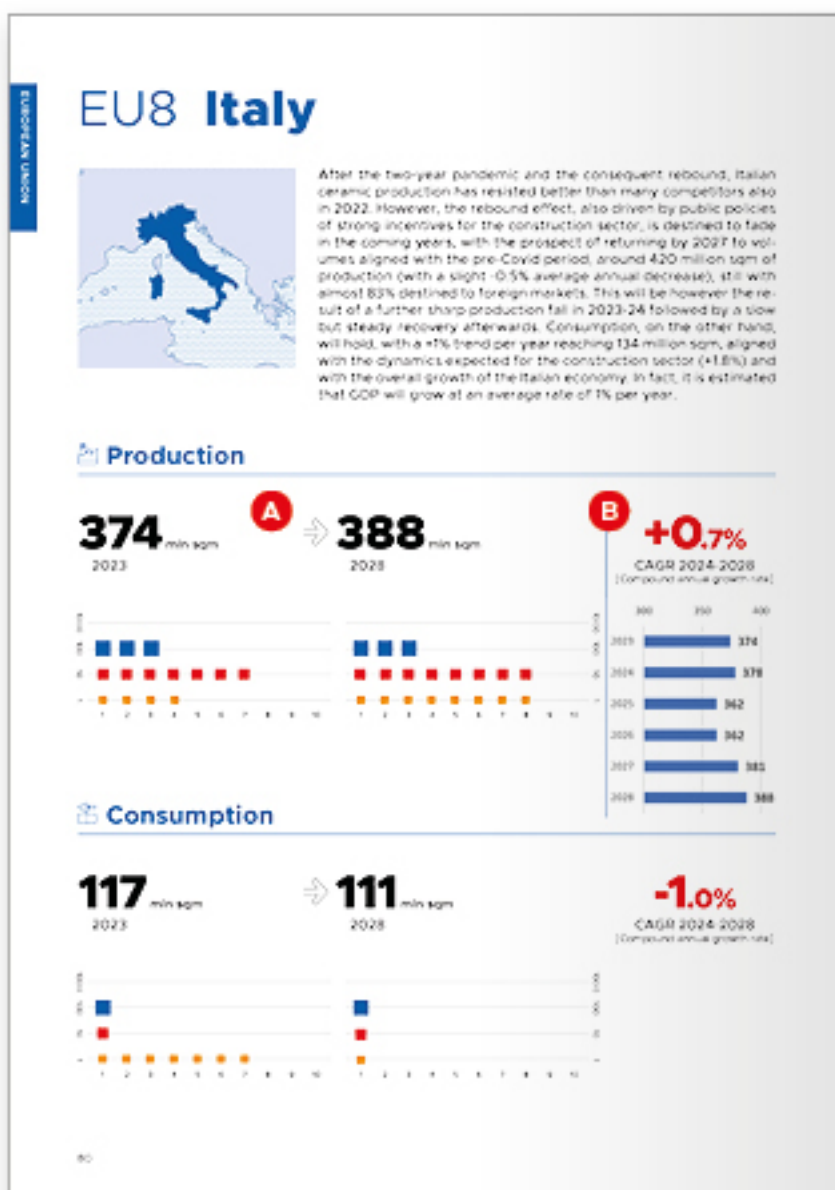
Legend

Production of ceramic tiles 2023-2028, consumption of ceramic tiles 2023-2028, share export/production & import/production, main destination countries, main supplier countries, main social, economic and construction indicators.

A In this section the reader can find **ceramic tile production and consumption volumes** of each country represented as on an abacus. Each figure is shown as units (In yellow), tens (In red), hundreds (In blue), and thousands (In black), both in 2023 and as 2028 forecasts (i.e.: 1,297 mln sqm is represented with 1 black, 2 blue, 9 red and 7 yellow squares).

B The figures presented in section B show each country's ceramic tile **production and consumption forecast compound annual growth rates (CAGR)** from 2024 to 2028, to highlight the medium-term ceramic trends. To help the reader, the figure is green when the market is growing, and red when decreasing.

C MCP (MECS Construction Potential) Index forecasts **annual construction industry trends** to 2028 by crossing ten international indicators (building permits; residential, commercial construction, civil engineering investments; renovations; house prices; housing expenditures; household purchasing power; housing affordability index; GDP)



Construction Investment Potential

MCP Index
MECS Construction Potential
CAGR 2024/28

+1.4% COUNTRY

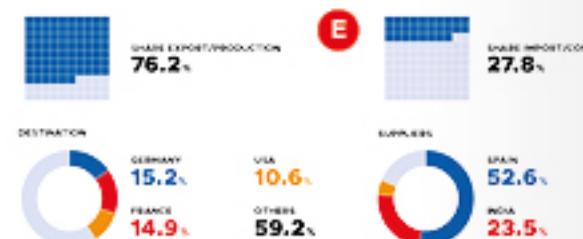
+2.0% MACRO AREA

MCP Index forecasts annual construction industry trends to 2028 by crossing ten international indicators

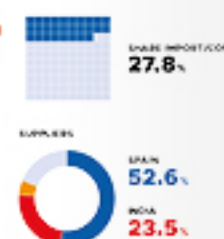
Macroeconomic Indicators



Export



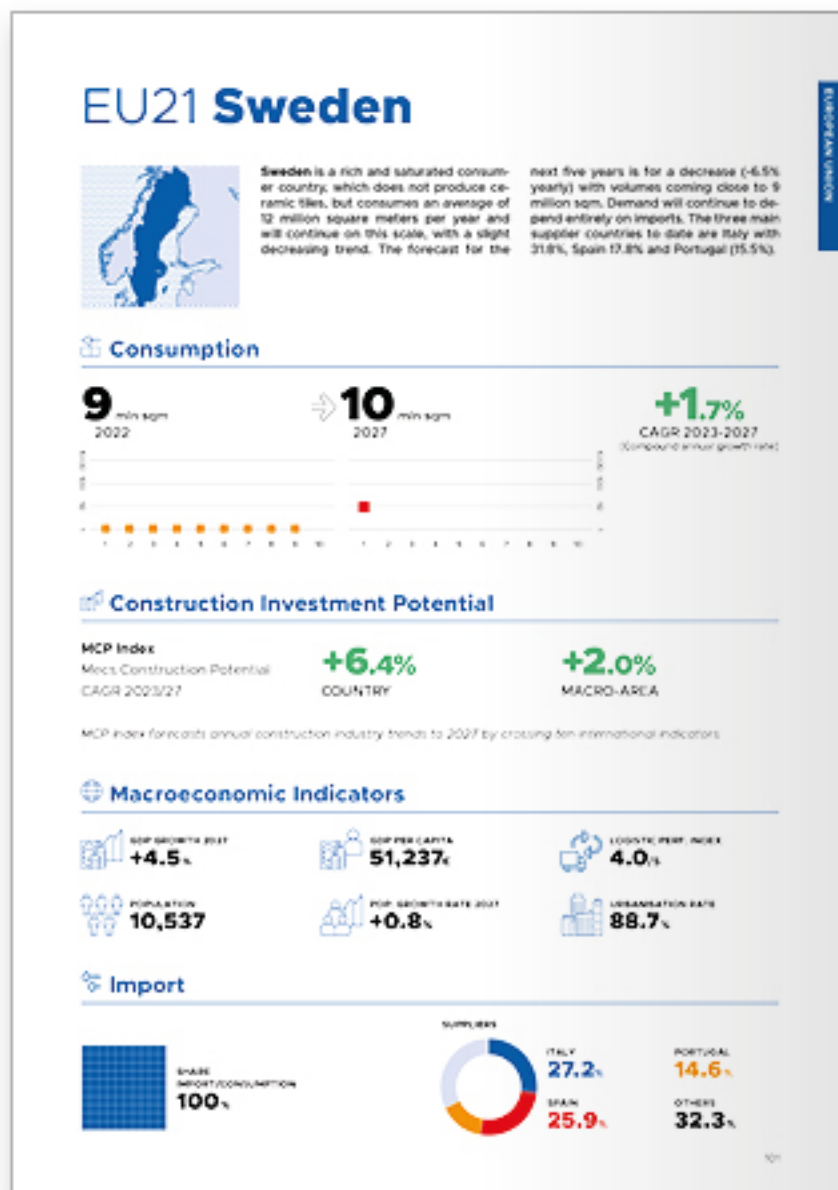
Import



D The reader can find here each country's average annual **GDP growth rate** until 2028 (constant value); **GDP per capita**, year 2023, in euro; **logistic performance index**: a synthetic measure of how easy is to move goods from and into the country. It aggregates information about customs, infrastructures, international shipments, logistics competence, tracking and tracing, timeliness. The measure goes from 1 to 5,

where 1 indicates poor and 5 very good logistic conditions; **population**, year 2023; **population annual growth rate** until 2028; **urbanisation rate**, year 2023: share of the population living in urban areas. Countries differ in the way they classify population as "urban" or "rural." The population of a city or metropolitan area depends on the boundaries chosen. *Data sources: IMF, OECD, The World Bank, United Nations*

E The section reports the ceramic tile **import and export propensity** of each country, through their import on consumption and export on production shares in 2023. The section indicates also the three main export destinations and the three main supplying countries with their corresponding shares.



Chapter 5

Tables

Summary of data

ISO	Country [alphabetical]	🏭 Production			🏠 Consumption		
		Volume 2023 [mln sqm]	CAGR 2024-28	Volume 2028 [mln sqm]	Volume 2023 [mln sqm]	CAGR 2024-28	Volume 2028 [mln sqm]
AD	Andorra	0	0	0	0	0	0
AE	United Arab Emirates	0	0	0	0	0	0
AF	Afghanistan	0	0	0	0	0	0
AG	Antigua and Barbuda	0	0	0	0	0	0
AI	Anguilla	0	0	0	0	0	0
AL	Albania	0	0	0	0	0	0
AM	Armenia	0	0	0	0	0	0
AO	Angola	0	0	0	0	0	0
AQ	Antarctica	0	0	0	0	0	0
AR	Argentina	0	0	0	0	0	0
AS	Samoa	0	0	0	0	0	0
AT	Austria	0	0	0	0	0	0
AU	Australia	0	0	0	0	0	0
AW	Aruba	0	0	0	0	0	0
AX	Åland Islands	0	0	0	0	0	0
AZ	Azerbaijan	0	0	0	0	0	0
BA	Bosnia and Herzegovina	0	0	0	0	0	0
BB	Barbados	0	0	0	0	0	0
BD	Bangladesh	0	0	0	0	0	0
BE	Belgium	0	0	0	0	0	0
BF	Burkina Faso	0	0	0	0	0	0
BG	Bulgaria	0	0	0	0	0	0
BH	Bahrain	0	0	0	0	0	0
BI	Burundi	0	0	0	0	0	0
BJ	Benin	0	0	0	0	0	0
BL	Belize	0	0	0	0	0	0
BM	Bermuda	0	0	0	0	0	0
BN	Brunei Darussalam	0	0	0	0	0	0
BO	Bolivia	0	0	0	0	0	0
BQ	Bonaire, Sint Eustatius and Saba	0	0	0	0	0	0
BR	Brazil	0	0	0	0	0	0
BS	Bahamas	0	0	0	0	0	0
BT	Bhutan	0	0	0	0	0	0
BV	Bouvet Island	0	0	0	0	0	0
BW	Botswana	0	0	0	0	0	0
BY	Belarus	0	0	0	0	0	0
BZ	Belize	0	0	0	0	0	0
CA	Canada	0	0	0	0	0	0
CC	Cocos (Keeling) Islands	0	0	0	0	0	0
CD	Congo	0	0	0	0	0	0
CF	Congo (Congo)	0	0	0	0	0	0
CG	Congo (Congo)	0	0	0	0	0	0
CH	Switzerland	0	0	0	0	0	0
CI	Ivory Coast	0	0	0	0	0	0
CK	Cook Islands	0	0	0	0	0	0
CL	Chile	0	0	0	0	0	0
CM	Cameroon	0	0	0	0	0	0
CN	China	0	0	0	0	0	0
CO	Colombia	0	0	0	0	0	0
CR	Costa Rica	0	0	0	0	0	0
CU	Cuba	0	0	0	0	0	0
CV	Cape Verde	0	0	0	0	0	0
CW	Curaçao	0	0	0	0	0	0
CX	Christmas Island	0	0	0	0	0	0
CY	Cyprus	0	0	0	0	0	0
CZ	Czechia	0	0	0	0	0	0
DE	Germany	0	0	0	0	0	0
DG	Dominica	0	0	0	0	0	0
DH	Dominican Republic	0	0	0	0	0	0
DI	Dominica	0	0	0	0	0	0
DJ	Djibouti	0	0	0	0	0	0
DK	Denmark	0	0	0	0	0	0
DM	Dominica	0	0	0	0	0	0
DO	Dominican Republic	0	0	0	0	0	0
DQ	Dominica	0	0	0	0	0	0
DR	Dominican Republic	0	0	0	0	0	0
DU	Dominica	0	0	0	0	0	0
DV	Dominica	0	0	0	0	0	0
DW	Dominica	0	0	0	0	0	0
DY	Dominica	0	0	0	0	0	0
EA	Spain	0	0	0	0	0	0
EC	Ecuador	0	0	0	0	0	0
EE	Estonia	0	0	0	0	0	0
EG	Egypt	0	0	0	0	0	0
EH	Western Sahara	0	0	0	0	0	0
ER	Eritrea	0	0	0	0	0	0
ES	Spain	0	0	0	0	0	0
ET	Ethiopia	0	0	0	0	0	0
EU	European Union	0	0	0	0	0	0
EV	European Union	0	0	0	0	0	0
EW	European Union	0	0	0	0	0	0
EX	European Union	0	0	0	0	0	0
EY	European Union	0	0	0	0	0	0
FJ	Fiji	0	0	0	0	0	0
FK	Falkland Islands (Malvinas)	0	0	0	0	0	0
FM	Federated States of Micronesia	0	0	0	0	0	0
FO	Faroe Islands	0	0	0	0	0	0
FR	France	0	0	0	0	0	0
GA	Gabon	0	0	0	0	0	0
GB	United Kingdom	0	0	0	0	0	0
GD	Grenada	0	0	0	0	0	0
GE	Georgia	0	0	0	0	0	0
GF	French Guiana	0	0	0	0	0	0
GG	Guernsey	0	0	0	0	0	0
GH	Ghana	0	0	0	0	0	0
GI	Guinea-Bissau	0	0	0	0	0	0
GL	Greenland	0	0	0	0	0	0
GM	Guinea	0	0	0	0	0	0
GN	Guinea	0	0	0	0	0	0
GP	Guadeloupe	0	0	0	0	0	0
GQ	Equatorial Guinea	0	0	0	0	0	0
GR	Greece	0	0	0	0	0	0
GS	South Georgia and the South Sandwich Islands	0	0	0	0	0	0
GT	Guatemala	0	0	0	0	0	0
GU	Guam	0	0	0	0	0	0
GW	Guinea-Bissau	0	0	0	0	0	0
GY	Guyana	0	0	0	0	0	0
HK	Hong Kong	0	0	0	0	0	0
HM	Heard Island and McDonald Islands	0	0	0	0	0	0
HN	Honduras	0	0	0	0	0	0
HR	Croatia	0	0	0	0	0	0
HT	Haiti	0	0	0	0	0	0
HU	Hungary	0	0	0	0	0	0
IC	Spain	0	0	0	0	0	0
ID	Indonesia	0	0	0	0	0	0
IE	Ireland	0	0	0	0	0	0
IL	Israel	0	0	0	0	0	0
IM	Isle of Man	0	0	0	0	0	0
IN	India	0	0	0	0	0	0
IO	British Indian Ocean Territory	0	0	0	0	0	0
IQ	Iraq	0	0	0	0	0	0
IR	Iran (Islamic Republic of)	0	0	0	0	0	0
IS	Iceland	0	0	0	0	0	0
IT	Italy	0	0	0	0	0	0
JM	Jamaica	0	0	0	0	0	0
JO	Jordan	0	0	0	0	0	0
JP	Japan	0	0	0	0	0	0
KE	Kenya	0	0	0	0	0	0
KG	Kyrgyzstan	0	0	0	0	0	0
KH	Khmer Rouge	0	0	0	0	0	0
KI	Kiribati	0	0	0	0	0	0
KM	Comoros	0	0	0	0	0	0
KN	Saint Kitts and Nevis	0	0	0	0	0	0
KO	South Korea	0	0	0	0	0	0
KR	South Korea	0	0	0	0	0	0
KU	Kuwait	0	0	0	0	0	0
KV	Kuwait	0	0	0	0	0	0
KW	Kuwait	0	0	0	0	0	0
KX	Kuwait	0	0	0	0	0	0
KY	Cayman Islands	0	0	0	0	0	0
KZ	Kazakhstan	0	0	0	0	0	0
LA	Laos	0	0	0	0	0	0
LB	Lebanon	0	0	0	0	0	0
LC	Saint Lucia	0	0	0	0	0	0
LD	Lebanon	0	0	0	0	0	0
LE	Lebanon	0	0	0	0	0	0
LF	Lebanon	0	0	0	0	0	0
LG	Lebanon	0	0	0	0	0	0
LH	Lebanon	0	0	0	0	0	0
LI	Liechtenstein	0	0	0	0	0	0
LK	Sri Lanka	0	0	0	0	0	0
LL	Lebanon	0	0	0	0	0	0
LM	Lebanon	0	0	0	0	0	0
LN	Lebanon	0	0	0	0	0	0
LO	Lebanon	0	0	0	0	0	0
LP	Lebanon	0	0	0	0	0	0
LQ	Lebanon	0	0	0	0	0	0
LR	Liberia	0	0	0	0	0	0
LS	Lesotho	0	0	0	0	0	0
LT	Lithuania	0	0	0	0	0	0
LU	Luxembourg	0	0	0	0	0	0
LV	Latvia	0	0	0	0	0	0
LY	Libya	0	0	0	0	0	0
MA	Morocco	0	0	0	0	0	0
MC	Monaco	0	0	0	0	0	0
MD	Moldova	0	0	0	0	0	0
ME	Montenegro	0	0	0	0	0	0
MF	France	0	0	0	0	0	0
MG	Madagascar	0	0	0	0	0	0
MH	Marshall Islands	0	0	0	0	0	0
MI	Maldives	0	0	0	0	0	0
MJ	Maldives	0	0	0	0	0	0
MK	Macedonia	0	0	0	0	0	0
ML	Mali	0	0	0	0	0	0
MM	Myanmar	0	0	0	0	0	0
MN	Mongolia	0	0	0	0	0	0
MO	Macao	0	0	0	0	0	0
MP	Morocco	0	0	0	0	0	0
MQ	France	0	0	0	0	0	0
MR	Morocco	0	0	0	0	0	0
MS	Montserrat	0	0	0	0	0	0
MT	Malta	0	0	0	0	0	0
MU	Mauritius	0	0	0	0	0	0
MV	Maldives	0	0	0	0	0	0
MW	Malawi	0	0	0	0	0	0
MX	Mexico	0	0	0	0	0	0
MY	Malaysia	0	0	0	0	0	0
MZ	Mozambique	0	0	0	0	0	0
NA	Namibia	0	0	0	0	0	0
NC	New Caledonia	0	0	0	0	0	0
NE	Niger	0	0	0	0	0	0
NG	Nigeria	0	0	0	0	0	0
NH	Norway	0	0	0	0	0	0
NI	Nicaragua	0	0	0	0	0	0
NL	Netherlands	0	0	0	0	0	0
NM	Norway	0	0	0	0	0	0
NP	Nepal	0	0	0	0	0	0
NQ	Norway	0	0	0	0	0	0
NR	Norway	0	0	0	0	0	0
NS	Norway	0	0	0	0	0	0
NT	Norway	0	0	0	0	0	0
NU	Norway	0	0	0	0	0	0
NV	Norway	0	0	0	0	0	0
NW	Norway	0	0	0	0	0	0
NX	Norway	0	0	0	0	0	0
NY	Norway	0	0	0	0	0	0
NZ	New Zealand	0	0	0	0	0	0
OM	Oman	0	0	0	0	0	0
ON	Norway	0	0	0	0	0	0
OO	Norway	0	0	0	0	0	0
OP	Norway	0	0	0	0	0	0
OQ	Norway	0	0	0	0	0	0
OR	Norway	0	0	0	0	0	0
OS	Norway	0	0	0	0	0	0
OT	Norway	0	0	0	0	0	0
OU	Norway	0	0	0	0	0	0
OV	Norway	0	0	0	0	0	0
OW	Norway	0	0	0	0	0	0
OX	Norway	0	0	0	0	0	0
OY	Norway	0	0	0	0	0	0
OZ	Norway	0	0	0	0	0	0
PA	Panama	0	0	0	0	0	0
PE	Peru	0	0	0	0	0	0
PF	France						

Countries with the highest market growth

Rank	ISO	Country	CAGR 2024-28	Volume 2023 [mln sqm]	Volume 2028 [mln sqm]	Delta volume [mln sqm]
Production						
1	IND	India	5.9%	2,450.0	3,263.4	813.4
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Rank	ISO	Country	CAGR 2024-28	Volume 2023 [mln sqm]	Volume 2028 [mln sqm]	Delta volume [mln sqm]
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Consumption

Rank	ISO	Country	CAGR 2024-28	Volume 2023 [mln sqm]	Volume 2028 [mln sqm]	Delta volume [mln sqm]
1	IND	India	7.8%	1,700.0	2,478.3	778.3
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