

TILE TODAY

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105

**SLIP RESISTANCE:
THE EXPERTS TALK**

**CEVISAMA AND QUALICER
REPORTS**

ARDEX SHOWS LEADERSHIP



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TILE TODAY

CONTENTS

LEADERSHIP

6 Fabian Morgan (Ardex Australia) and Shaun Cozens (DTA Australia) discuss how their dependability is a key factor to working through a global pandemic.

RETAIL FOCUS

9 A winning mix of digital and in-store strategies is delivering growth for The Tile Collective.

PROFILE

15 GNS Ceramics now offers coverage throughout the eastern seaboard of Australia. Richard Murphy and Jono Stokes tell us how they did it.

STATISTICS

18 Ceramic tile imports decreased dramatically in 2019.

SLIP RESISTANCE FEATURE

24 Experts in the field provide their views on testing methodologies and how they are likely to evolve in the next few years.

CEVISAMA

33 International correspondent, Joe Simpson reports on this year's show.

QUALICER

46 Regular contributor, Peter Halliday travelled to Valencia, Spain to provide an overview of Qualicer 2020.

INDUSTRY ROUNDUP

55 Tile styles coming out of the United Kingdom and Corian's organic colour collection.

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We hope you will take the time join the growing tile community that will receive the digital magazine. **Just click here to subscribe:**

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In this edition, we speak to some of the leading proponents in the field of slip resistance about current testing methods and future developments.

This issue is also filled with stories from people who we regard as leaders in the tiling industry. First up, Fabian Morgan, managing director of Ardex Australia and Shaun Cozens, managing director of DTA Australia explain how they continue to support their customers in the age of coronavirus.

Richard Murphy and Jono Stokes also tell us how they expanded GNS ceramics at a time when they could have easily rested on their laurels when the business celebrated its 50th anniversary.

We also "travel" to Spain to see the latest tile styles that have come out of the Cevisama event and provide highlights from Qualicer.

We hope you enjoy this issue and invite anyone to contact me on betty.tanddo@elitepublishing.com.au for feedback or story suggestions we can follow up.

Until next time,



Betty Tanddo
Editor

FRONT COVER IMAGE

Agate white, exterior tiles with slip resistance are from Krem and made in India. These rectified glazed floor tiles can be supplied in 60 x 60cm and 60 x 120cm on request. They are available in polished, matte, lapatto and R11 finishes. In addition to white, the tiles also come in dark grey, mid grey, light grey and ivory. The range is distributed by the Tile Agencies Group in Australia.



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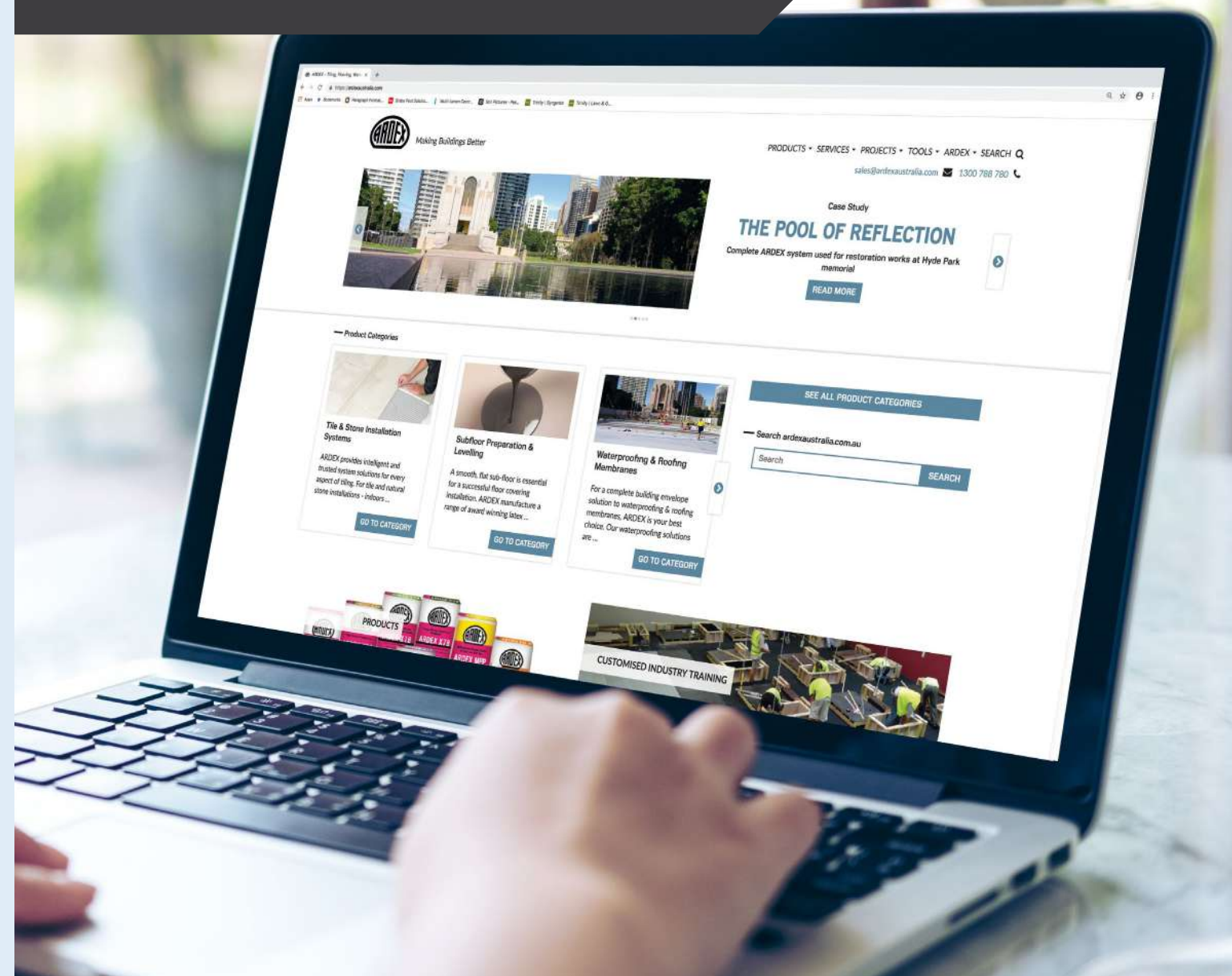
Leading the Industry

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Ardex: The benefits of a global presence

With a global presence and strong Australian supply chain, the Ardex Group is focused on ensuring its retail partners and tiling customers survive and succeed



The ARDEXacademy provides training and accreditation to tilers, as well as mobile academies that can be set up in any town or location nationally

The novel coronavirus SARS-CoV2 (which gives rise to the COVID-19 disease) has had a catastrophic effect on industries such as hospitality, tourism and travel. In contrast, the forecast short- and long-term effects of the pandemic on commercial and residential construction are more nuanced. Where for many other industries the pandemic is nearly a full-stop, for construction it's more of a dash — the industry continues in recognisable form, but follows a different direction.

Dependable supply

Forecasts for what will happen to the tiling and flooring industry on the other side of that dash are something Fabian Morgan and Shaun Cozens have been following closely. Fabian is managing director of Ardex Australia, and Shaun is managing director of DTA Australia (DTA), which became part of the Ardex Group in 2018. It's not just the tiling industry itself they've been considering, but also the important

flow-on effects for both tilers, and flooring and tile retailers.

As Fabian sees it: "The coronavirus has completely reshaped the industry landscape. Coming into 2020, we could see the boom in the residential new build market was beginning to cool off, with Australian Bureau of Statistics data showing an 18.5% year-on-year decline between 2019 and 2018. This was due, in part, to a decrease in construction of multi-residential units, resulting in a drop in tile imports."

As the pandemic made its presence felt, Fabian says, all that changed. "Today, we are seeing unprecedented sales in all trade-focused brands including ABA, Dunlop and Ardex, despite government restrictions, as builders and tradesmen look for reliable supply chains to complete existing and new projects."

Leading professional floor and wall tool brand, DTA has also seen an increase in business during

the COVID-19 pandemic, thanks to its focus on the needs of tilers and retailers across the country. According to Shaun, that is due in part to DTA's robust supply chain.

"Reliability is a key part of any business, which has become even more apparent in the last few months as international and inter-state transport has been restricted. Our distribution centres in Melbourne, Sydney, Brisbane and Perth have been central in supporting tilers and resellers, so that they can remain reliable to their customers. Our focus on designing tools for local markets and owning our supply chain have been factors in our continued success," he said.

This focus on dependability avoids a number of pitfalls for tiling and building companies, including warranty issues, impacts on timescales, potential price increases associated with sourcing new products and reskilling craftspeople to use them. These can all significantly affect the reputation

of a building or tiling business, jeopardising future opportunities.

Additionally, for retailers, consistent stock levels will ensure trust with their trade and consumer customers. It also helps to avoid excessive administration and time spent in negotiations to acquire products from new suppliers.

Fabian sees the impacts of import and interstate transport as also playing a part in increasing sales of tile adhesives. "The Ardex Group is one of the largest manufacturers across APAC [Asia-Pacific region], with manufacturing operations in Malaysia, Singapore, Thailand, Vietnam, Taiwan, South Korea and China. Despite this, we choose to produce approximately 95% of our locally sold products in Australia, and carry stock in every state.

"We also have six manufacturing plants and 11 distribution centres nationwide, providing a strong supply chain direct to tilers and retailers without hold-ups or cancellations. This includes our new manufacturing and distribution facility in Brisbane and our state-of-the-art distribution centre in Kings Park, Sydney. Both are recent investments showing our commitment to the local market."

Ardex has more developments planned, with a view to the future, as Fabian points out. "Further investments underway include a doubling of our already significant powder manufacturing in Auckland, New Zealand. This will have the benefit of freeing up capacity in Australia, along with construction of two new manufacturing lines to be commissioned in 2020. We are investing with a very long return horizon."

Overcoming challenges

The first half of 2020 has created a new set of concerns and opportunities for tilers and retailers, according to Shaun: "For tilers, the coronavirus has pressed 'fast forward' on the market, as at the beginning of the year we were seeing home renovations increasing. This has only been spurred on by the recent restrictions and economic

climate, moving the residential market toward a higher volume of small jobs.

"While there will still be a small number of big residential jobs, tilers in particular should be looking at how they can make this wealth of smaller jobs profitable.

"The flooring and tile retailers that we've seen enjoying success in the COVID-19 era have listened to the market," adds Fabian. "Unfortunately, our sales teams have seen a number of resellers take a 'one size fits all' approach to their businesses, and simply cut access and support for both trade and consumers in line with falling retail traffic and legitimate health concerns.

"However, there are those that have seen and adapted to consumers dropping off at 'the front of the store', while tradespeople have continued to drive demand. Rather than cut support for both markets, retailers need to shift their focus to 'the back of the store' until consumers return to the aisles."

A big winner in the retail sector has been hardware stores, which have remained open during restrictions as an essential service. These businesses have led the way in managing consumer engagement, says Shaun: "In troubling times, it's paramount to make customers feel safe. Moving forward, tile and flooring stores that proactively manage social distancing and provide opportunities for sanitation can help customers feel confident in visiting when they need to buy something. This will remain vitally important for a long time, as even with restrictions starting to lift, social distancing will remain a reality long-term."

Shaun believes that for retailers — especially those in rural locations — the way they treat staff will also continue to be important. "Your staff will be your front line



Top, The Ardex Australia manufacturing and distribution facility in Brisbane (QLD) was officially opened by global CEO Mark Eslamlooy in 2018, long before social distancing became important. Bottom, Fabian Morgan, managing director of Ardex Australia

in making consumers feel safe in your store, so it's important that they are trained and sufficiently motivated to deliver the best service possible. Additionally, they act as ambassadors in your local community who provide trust and a personal connection to the business, particularly in smaller towns."

Upcoming trends

As with all building and construction sectors, a big driver of demand in tiling is style trends. Today, the rise of the Hamptons and coastal looks is pushing demand for light colours and natural materials. Meanwhile, the enduring popularity

→ of modern aesthetics is encouraging a preference for large format tiles and dark colours to create floors and walls with fewer grouting lines.

While these looks are driven by home styling magazines, social media and pop culture as aspirational goals, they do not necessarily educate consumers and developers on the specific adhesives, grouts and tile trim to use to achieve the desired style. Tiling experts and retailers are a valuable source of information, and they will benefit from understanding the latest looks and the products that will be in demand.

Fabian outlines the advantages that the Ardex Group offers as an international company. "With travel to global trade conventions being limited, working with a manufacturing partner that offers an international base is hugely important. Alongside APAC, the Ardex Group has operations in the design capitals of the world, from

England and mainland Europe, to America. Along with stocking brands that consumers know and trust, understanding the aesthetics they will be specifying in the coming seasons is a huge advantage," he said.

Fabian also points to how the Ardex Group is increasing its support for the industry, with the latest trends, data and best practice as part of a long-term commitment — a commitment that has been accelerated to meet the needs of the industry due to COVID-19.

"The ARDEXacademy provides a wealth of training and accreditation to tilers with our team of technical experts at training facilities in all state capitals, as well as mobile academies that can be set up in any town or location nationally. This includes courses on floor levelling, waterproofing, large format tile training and concrete repair," he explains.

"Our initial plan was to offer this full suite online within two years. We

have now accelerated this timeline to launch the ARDEXacademy Online in the coming months. This will follow the success of our current online video conference tutorials, which have been massively oversubscribed, even as additional sessions were put on to meet demand."

Retailers and tilers can also benefit from Ardex's expertise, as it offers the largest technical phone support team in Australia. This is backed by a wealth of online tools and content including the brand's interactive grout selector, which models colour choices against different tile options. The site also offers a tiling product selector, which advises on the right adhesive based on tile and substrate choices.

To help reinforce its relationships with tilers and retailers, DTA Australia offers many instructional videos on a wide range of products from levelling systems and water proofing, to dust shields and extractors. It also offers support in dedicated locations in every state.

On the ground, the Ardex Group assists retailers with over 60 field sales professionals who offer technical and customer support along with retail training. Throughout the last few months, they have remained active and available to stores, builders and tradies, while adhering to strict social distancing policies. This team has been expanded during the coronavirus to provide additional support to customers.

In conclusion, Fabian summarises the ongoing support the Ardex Group will provide:

"We will continue to lead and support the industry, which we can only do thanks to our 300 plus dedicated team here in Australia. Our manufacturing plants and distribution centres deliver orders within a matter of days, easing cash flow for our customers, and our R&D team understand the Australian market to ensure we have the right products, whilst our sales team offer the highest level of customer service.

"Ultimately, our retailers' and tilers' success is our success." ■

Top, Ardex Australia has a state-of-the-art distribution centre in Kings Park, Sydney. Bottom, the show-room at DTA's head office in Melbourne.





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Dramatic fall in ceramic tile imports in 2019

Following three years of relatively stable volumes, imports of ceramic tiles to Australia plummeted by 12.1 per cent in quantity and 9.6 per cent in customs value in 2019, writes Peter Halliday.

The data for ceramic tile imports during the 2019 calendar year published by the Australian Bureau of Statistics (ABS) shows that Australia imported 40,120,185 square metres of ceramic tiles, down from the 45,577,062 square metres in 2018.

The total Australian customs value was A\$433,181,938, down from A\$479,611,522 in 2018.

The December quarter 2019 showed a slight increase over the December quarter in 2018, indicating that the market may have stabilised (prior to emergence of

the Covid-19 pandemic). The four quarters prior showed significant declines of between -10 and -17 per cent when compared with the corresponding periods 12 months earlier. **Fig.1** illustrates total imports in both quantity and value over

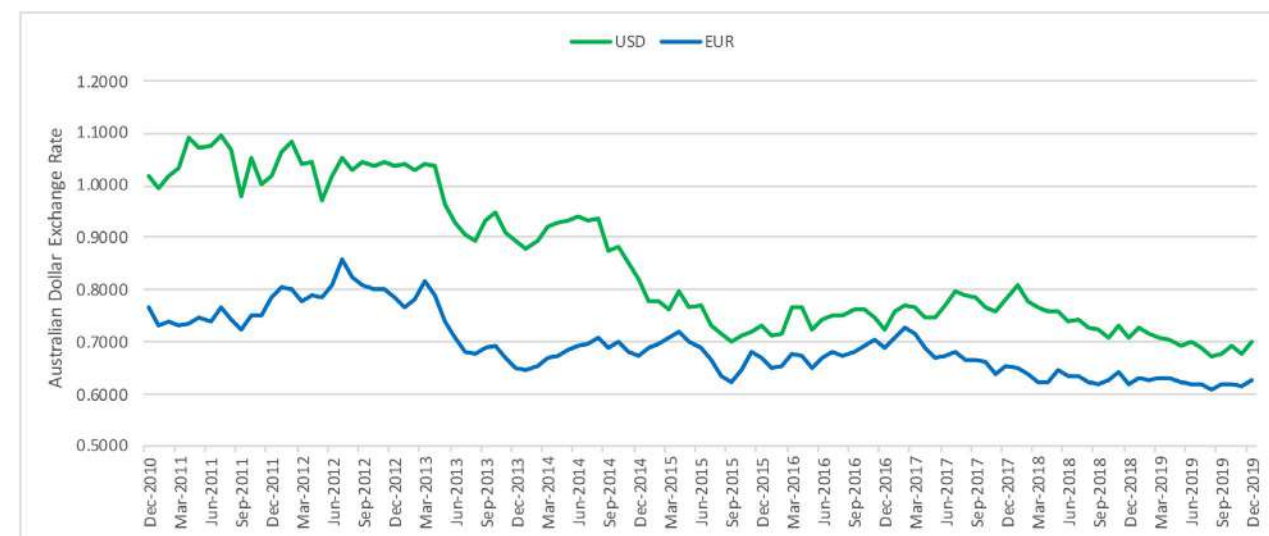
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FIG.1 CERAMIC TILE IMPORTS MOVING 12 MONTH TOTAL



Data source: ABS

FIG.2 AUD EXCHANGE RATE 2010 - 2019



Data source: Reserve Bank Australia



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FIG.3 CERAMIC TILE IMPORTS 2019

COUNTRY OF ORIGIN	IMPORT DESTINATION STATE							Total Square Metres	Total Customs Value AUD
	New South Wales*	Northern Territory	Queensland	South Australia	Tasmania	Victoria	Western Australia		
Australia (Re-imports)							1,600	1,600	16,858
Bangladesh			301					301	7,469
Belgium	1,781			1,415		62		3,257	188,071
Brazil	90,638	1,067	24,079	4,274		34,492	10,362	164,912	2,247,640
Bulgaria					207		4,726	4,934	49,351
Canada	1,148					442		1,590	23,216
China (excluding SARs and Taiwan)	11,516,187	144,799	5,693,486	1,624,452	150,701	7,290,260	1,909,836	28,329,721	246,220,980
Czech Republic	2,266	7,027					5,209	14,503	163,627
Ecuador	1,300							1,300	38,895
Egypt			149					149	4,012
France	10,032		1,170	3,268		7,053	3,473	24,995	761,288
Germany	92,177		48,476			41,873	7,154	189,680	4,286,850
Greece						442		442	13,215
Hong Kong (SAR of China)	7,469					3,534	268	11,271	105,336
India	344,469	2,093	45,796	34,321	2,255	99,266	83,054	611,254	5,390,563
Indonesia	110,015	7,070	114,203	18,951	8,640	31,032	27,214	317,125	3,477,325
Iran	5					2,779		2,784	22,069
Israel	150							150	14,587
Italy	1,369,529	6,248	495,312	147,334	33,917	856,046	485,796	3,394,181	88,760,137
Japan	79,829		3,264	270		389,928	10,516	483,807	3,048,284
Jordan	50					1	1	52	3,471
Korea, Republic of (South)	127,330		2,944	6,753	132	12,106		149,265	1,349,068
Lebanon	3							3	1,271
Macau (SAR of China)			15					15	1,162
Malaysia	709,371	43,906	798,966	206,897	5,718	1,386,969	84,122	3,235,951	21,912,749
Mexico	3,390		51					3,441	55,986
Morocco	7,148		395			1,659	204	9,405	757,793
Netherlands	7,218		1,588	2		6,907		15,714	234,096
New Zealand	58		80			10,334		10,471	61,946
Oman						2,534		2,534	11,929
Pakistan						922		922	14,993
Poland	1					5,706		5,707	26,083
Portugal	32,588		2,323	19	1,083	67,570	18,444	122,027	2,393,378
Russian Federation	396							396	23,814
Saudi Arabia			86			300		386	5,033
Serbia	716							716	26,944
Singapore			119					119	16,559
South Africa	4,536						196	4,732	30,768
Spain	924,594	112	246,457	12,538	22,796	358,639	139,410	1,704,546	37,128,991
Sri Lanka	74,316		92,108	1,683		17,033	202,544	387,683	3,100,151
Taiwan	2,156		2,182		1,244	1,710		7,292	101,972
Thailand	111,034		40,889	3,322		60,185	45,553	260,983	2,628,739
Turkey	55,011		84,717	14,790		37,749	13,299	205,566	3,434,759
Ukraine					270			270	4,745
United Arab Emirates	167,124	6,575	12,458	2,039		48,268	1,583	238,048	3,379,636
United Kingdom	2,064			56		2,073	155	4,348	198,906
United States of America	4,704		7,626		29	4,452		16,811	527,473
Vietnam	136,715		17,324	10,050		1,954	8,783	174,827	909,750
Grand Total	15,997,520	218,898	7,736,564	2,092,434	226,992	10,784,278	3,063,501	40,120,185	433,181,938
State Share	39.9%	0.5%	19.3%	5.2%	0.6%	26.9%	7.6%	100.0%	

*Includes ACT
Data source: Australian Bureau of Statistics

→ the past 10 years to the end of December 2019.

Australia imports almost 90 per cent of the ceramic tiles it consumes. The foreign exchange rate plays a big part in the landed cost, which roughly corresponds to the Australian customs value, and therefore to the wholesale price of ceramic tiles. Major importers have sought to keep prices down by increasing the amount they purchase from lower cost countries such as China and more recently India. Fig.2 illustrates the foreign exchange rate history over the past 10 years.

Imports by country and the declared destination state are shown in Fig.3. China was still the largest source for ceramic tiles sold in Australia, supplying 70.6 per cent of the total import quantity. This represented a slight increase in market share over the previous year while the total import quantity from China was down -11 per cent, slightly less than the national percentage decline.

The value of Chinese imports declined by -8 per cent and represented 56 per cent of the total customs value of imports. The average customs value of tiles from China was AUD8.69 per square metre in 2019.

Italy was the second largest

The value of Chinese imports declined by -8 per cent and represented 56 per cent of the total customs value of imports.

supplier to Australia in 2019. While the volume of Italian tiles decreased by -20 per cent, the value of imports from Italy decreased by only -13 per cent, possibly indicating the higher value of the material now being sourced from Italy. The average customs value was AUD26.15 per square metre.

The volume of tiles imported from Malaysia was -18 per cent down on the previous year and -23 per cent down in value. The average customs value per square metre was AUD6.77.

The fourth largest source for ceramic tiles, Spain, declined by -5 per cent and -2 per cent in value, much less than the national average. The average customs value from Spain was AUD21.78 per square metre.

India became the fifth biggest source of ceramic tile imports to Australia in 2018 and continued to increase its market share to 1.5 percent in 2019. While the volume in 2019 was still significantly smaller than the top four countries already mentioned, there is no doubt that

India is growing as a source of lower cost tiles. The average customs value of tiles imported from India was AUD8.82, very similar to China's average.

Whilst total tile import volumes into Australia fell by 12 per cent, tile imports from India increased by 10 per cent in 2019 and the customs value increased by 14 per cent. Over 83 per cent of tiles imported from India were classified as porcelain with a less than 0.5 per cent moisture absorption. Only 2.4 per cent were tiles with a moisture absorption above 10 per cent.

The ABS only records the declared destination state on import documentation for imported tiles. However, it is possible that some of these may be sold and transferred to other states. Fig.4 illustrates each state's declared import quantity and share of the national total over the last six years.

New South Wales was still the top destination to receive the largest quantity of tile imports



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FIG.4 CERAMIC TILE IMPORTS - STATE SHARE

	Calendar Year	New South Wales (inc ACT)	Northern Territory	Queensland	South Australia	Tasmania	Victoria	Western Australia	Combined Total M2	Change On Previous Year	Total Customs Value AUD
StateTotal	2014	14,409,415	663,506	8,056,465	1,993,568	188,544	9,290,549	5,033,204	39,635,250	13%	\$375,779,939
% of annual total		36.4%	1.7%	20.3%	5.0%	0.5%	23.4%	12.7%	100.0%		
StateTotal	2015	16,080,653	639,072	8,865,158	2,260,547	207,667	10,138,373	5,089,541	43,281,009	9.2%	\$464,476,306
% of annual total		37.2%	1.5%	20.5%	5.2%	0.5%	23.4%	11.8%	100.0%		
StateTotal	2016	18,709,544	424,309	10,018,660	2,140,593	214,828	10,240,295	4,364,964	46,113,193	6.5%	\$483,168,120
% of annual total		40.6%	0.9%	21.7%	4.6%	0.5%	22.2%	9.5%	100.0%		
StateTotal	2017	18,499,241	377,444	9,913,040	1,985,877	194,038	10,987,176	3,906,819	45,863,635	-0.5%	\$464,522,945
% of annual total		40.3%	0.8%	21.6%	4.3%	0.4%	24.0%	8.5%	100.0%		
StateTotal	2018	19,007,104	287,716	8,826,335	2,131,842	233,748	11,298,180	3,792,137	45,577,062	-0.6%	\$479,611,522
% of annual total		41.7%	0.6%	19.4%	4.7%	0.5%	24.8%	8.3%	100.0%		
StateTotal	2019	15,997,520	218,898	7,736,564	2,092,434	226,992	10,784,278	3,063,501	40,120,185	-12.0%	\$433,181,938
% of annual total		39.9%	0.5%	19.3%	5.2%	0.6%	26.9%	7.6%	100.0%		

Data source: ABS

FIG.5 CERAMIC TILE IMPORT CUSTOMS CLASSIFICATION 2019

Harmonised Tariff Code	Description	Import SQM	% of Total SQM	Customs Value (AUD)	% of Total AUD	Average \$ Per SQM
6907211001	Tiles, cubes and similar articles, water absorption coefficient by weight not exc 0.5% (excl. 690730 and 690740), whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is less than <7 cm	351,257	0.9%	\$4,160,797	10.4%	\$11.85
6907219002	Tiles, cubes and similar articles, water absorption coefficient by weight not exc 0.5% (excl. 690730 and 690740), whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is greater than >=7 cm	23,199,083	57.8%	\$295,401,840	736.3%	\$12.73
6907221003	Tiles, cubes & similar articles, water absorption coefficient by weight exc 0.5% but not exc 10% (excl. 690730 & 690740) whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is <7cm	22,502	0.1%	\$346,563	0.9%	\$15.40
6907229004	Tiles, cubes & similar articles, water absorption coefficient by weight exc 0.5% but not exc 10% (excl. 690730 & 690740) whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is >=7cm	7,818,995	19.5%	\$60,012,042	149.6%	\$7.68
6907231005	Tiles, cubes and similar articles, water absorption coefficient by weight exceeding 10% (excl. 690730 and 690740), whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is <7 cm	25,333	0.1%	\$205,402	0.5%	\$8.11
6907239006	Tiles, cubes and similar articles, water absorption coefficient by weight exceeding 10% (excl. 690730 and 690740), whether or not rectangular, largest surface area of which is capable of being enclosed in a square the side of which is >=7 cm	7,248,164	18.1%	\$51,209,435	127.6%	\$7.07
6907301007	Mosaic ceramic tiles, cubes and similar articles (excluding those of 690740), whether or not rectangular, the largest surface area of which is capable of being enclosed in a square the side of which is less than 7 cm	240,504	0.6%	\$5,138,986	12.8%	\$21.37
6907309008	Mosaic ceramic tiles, cubes and similar articles (excluding those of 690740), whether or not rectangular, the largest surface area of which is capable of being enclosed in a square the side of which is greater or equal to 7 cm	285,533	0.7%	\$4,820,918	12.0%	\$16.88
6907401009	Finishing ceramic tiles, cubes and similar articles, whether or not rectangular, the largest surface area of which is capable of being enclosed in a square the side of which is less than 7 cm	39,016	0.1%	\$829,689	2.1%	\$21.27
6907409010	Finishing ceramic tiles, cubes and similar articles, whether or not rectangular, the largest surface area of which is capable of being enclosed in a square the side of which is greater or equal to 7 cm	889,811	2.2%	\$11,056,266	27.6%	\$12.43
Grand Total		40,120,199	100.0%	\$433,181,938	1079.7%	\$10.80

Data source: ABS

→ but it declined by -16.1 per cent in 2019, reflecting the downturn in building activity. The state now represents 39.9 per cent of the national total. New South Wales sourced 72.0 per cent of tiles from China, slightly above the national average whereas the percentage imported from Malaysia was 4.4 per cent, well below the national average. New South Wales also imported volumes above the national average from Spain and India.

Victoria was the second largest state for tile imports, accounting for 26.9 per cent of the national total. Imports to Victoria declined by only -4.5 per cent, reflecting that the residential construction downturn was not evenly spread across all states at the same time in 2019. The state imported fewer tiles from China than the national average (67.6 per cent), 7.9 per cent from Italy, 12.9 per cent from Malaysia and 3.3 per cent from Spain. Victoria only imported 0.9 per cent of tiles from India but

imported far higher quantities of porcelain tiles than the national average from Japan.

Imports into Queensland declined by -12.3 per cent in line with the national downturn. Queensland sourced 73.6 per cent of tiles from China, 6.4 per cent from Italy, 10.3 per cent from Malaysia, and 3.2 per cent from Spain. India represented only 0.6 per cent of the state total.

Western Australia continued its run of declining imports for the fourth consecutive year, recording a further -19.2 per cent downturn. The imported only 62.3 per cent of tiles from China, 15.9 per cent from Italy, 2.7 per cent from Malaysia, 4.6 per cent from Spain and 2.7 per cent from India.

South Australia declined by a modest -1.8 per cent, Tasmania by -2.9 per cent and Northern Territory by -23.9 per cent.

South Australia imported 77.6 per cent of their tiles from China, above the national average, while importing well below the national

average of tiles from Spain at only 0.6 per cent of the state's total. Imports from India to South Australia were 1.6 per cent of the state total.

The summary table in **Fig.5** details the breakdown of all imports by Harmonised Tariff Code. It shows porcelain tiles made up 51.7 per cent of all imports. Tiles with a moisture absorption above 10 per cent, typically wall tiles, made up 16 per cent of the import total, although many of the other categories would also be used on walls.

Tiles with a moisture absorption between 0.5 and 10 per cent made up 17.2 per cent of the total whilst mosaics made up 1.1 per cent, and finishing ceramics 2.1 per cent. ■

Peter Halliday is the recently retired managing director of Decor8 Tiles

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