EU MARKET SURVEY 2003

NATURAL STONE AND NATURAL STONE PRODUCTS

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2003

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Update of CBI Market Survey Natural Stone and Natural Stone Products, October 2001.

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REPORT SUMMARY

This EU Market Survey profiles the EU market for natural stone and natural stone products. The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major international markets within the EU for these products are highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

As an exporter you need this information to formulate your own market and product strategies. In order to assist you with this, CBI developed a matching EU Strategic Marketing Guide "Natural Stone and Natural Stone Products". It aims to offer a practical handbook for exporters engaged, or wishing to engage in exporting natural stone and natural stone products to the European Union. It aims to facilitate exporters in formulating their own marketing and product strategies through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

The natural stone and natural stone products discussed in this Market Survey fall under the following groups:

- Blocks of natural stone either from siliceous stones (such as granite) or calcareous stones (such as marble);
- Slabs of natural stone, either from siliceous stones or calcareous stones;
- Natural stone products with a flat or even surface used for flooring & cladding, either from siliceous stones or calcareous stones (such as square tiles);
- Natural stone products used for urban or rural landscape design (such as setts, curbstones and flagstones) which cannot be sub-divided per stone type;
- Natural stone products used for religious and other art (such as tombstones and garden decorations).

Consumption
At a global market level, the natural stone industry can be characterised by stagnating demand, increasing competition and expanding supply, which is fuelled by technical progress in quarrying technology. This causes a downward pressure on the general price level. Within the EU, Italy (8 percent) is the largest consumer of natural stone products, followed by Spain, Germany (both 6 percent) and France (4 percent).

Production
Total production of finished products of natural stone in the European Union countries in 2001 was nearly 14 million tonnes (around 40 percent of world stone production). The main producers of natural stone products in Europe are Italy and Spain with a production of about 5,880 thousand tonnes (42 percent of total EU production) and 3,273 tonnes (24 percent) respectively followed by Portugal (9 percent), France (7 percent) and Greece (6 percent).

Imports
In 2001, total EU imports of natural stone and natural stone products reached a volume of 10,483 thousand tonnes, which represented a value of € 2,188 million. An overview of EU imports of natural stone and natural stone and natural stone products is presented on the next page.

Between 1999 and 2001 the value of EU imports increased by 13 percent and the volume 9 percent. Changes in volume and value of imports were very different for the respective Member States however. Differences across product groups with respect to changes in volume and value between EU Member States will be discussed in this section for Italy, Germany, Spain, Belgium & Luxembourg and the Netherlands.

Blocks of natural stone constituted the largest share (35 percent) of EU imports of natural stone and natural stone products followed by funeral and other art (34 percent), natural stone and natural stone products for landscape design (11 percent), tiles for flooring and cladding (11 percent) and slabs (9 percent).

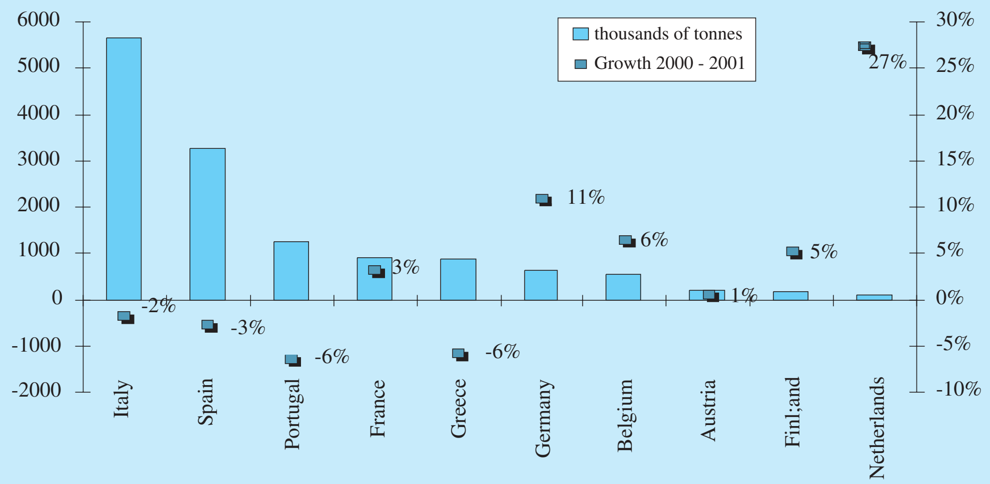
In 2001, EU imports of natural stone and natural stone products from developing countries amounted to € 949 million with a volume of 3,865 thousand tonnes. This value represented 32 percent of total EU imports of natural stone and natural stone products, and 19 percent in volume.

In 2001, almost one third (29 percent) of EU imports of natural stone and natural stone products from developing countries originated from India.

Country	Consumption of natural Stone ('000 square metres)	Share in world consumption
Italy	59,780	8.4%
Spain	45,080	6.4%
Germany	43,060	6.1%
France	26,180	3.7%
Greece	14,340	2.0%
Belgium	10,500	1.5%
Portugal	9.380	1,2%
Netherlands	8,470	1.2%
Austria	7.190	1.0%
Finland	3,400	0.5%

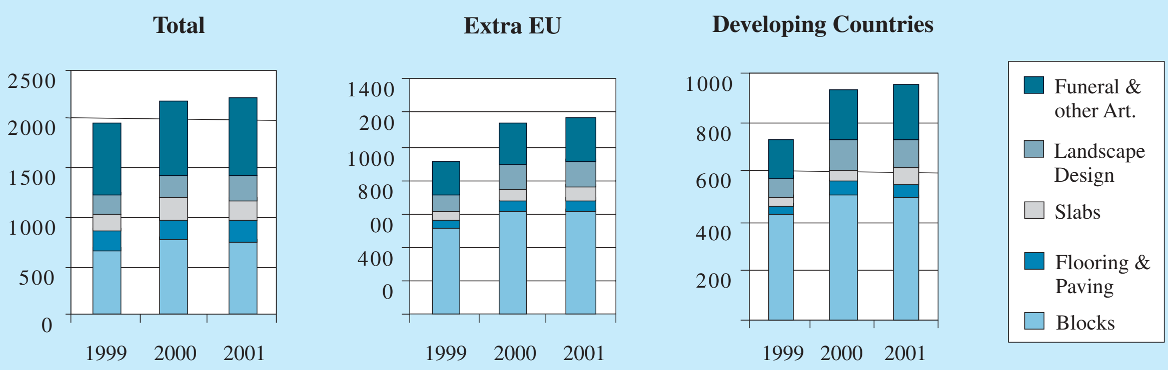
Source: Stone 2002, World Marketing Handbook

Production of EU countries in 2001 (in thousands of tonnes) and growth between 2000-2001



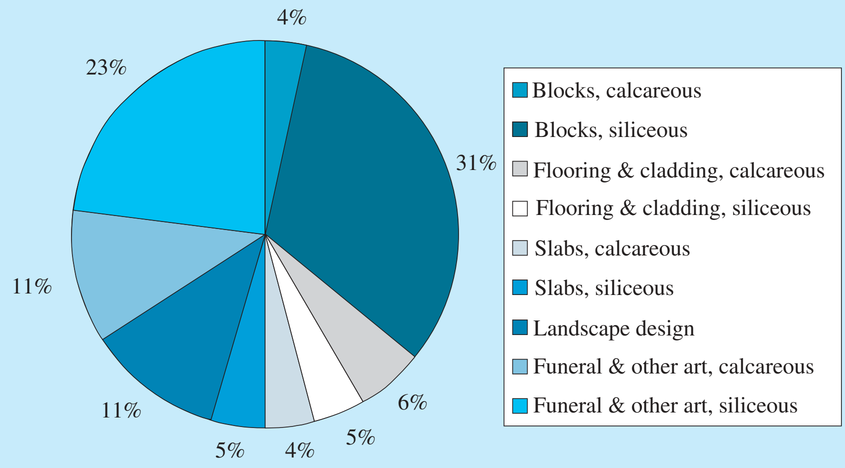
Source: Stone Report 2002

Overview of EU imports of natural stone and natural stone products, in million €, 1999–2001



Source: Eurostat 2002

Shares of product groups in EU import of natural stone and natural stone products, 2001



Source: Eurostat (2002)

In 2001, India exported 1,038 thousand tonnes of natural stone and natural stone products with a total value of € 275 million. Since 1999, India registered growth in its exports by 19 percent in value and by 11 percent in volume. China is the second largest exporter of natural stone and natural stone products to the EU, accounting for 21 percent of EU imports from developing countries. Brazil accounts for 18 percent of EU imports from developing countries followed by South Africa (10.7 percent), Turkey (6.9 percent), Iran (1.9 percent), Saudi Arabia (1.4 percent), Egypt (1.2 percent), Mozambique (1.0 percent), Vietnam (1.0 percent), Croatia (0.9 percent), Morocco (0.7 percent) and Zimbabwe (0.7 percent).

Exports

In 2001, the EU Member States exported 8,010 thousand tonnes of natural stone and natural stone products representing a total value of € 3,367 million. Between 1999 and 2001, the value of total EU exports decreased by 13 percent, while volume increased by 4 percent. The main EU exporter of natural stone and natural stone products is Italy, followed by Spain, Portugal, France, Belgium and Greece.

In 2001, 23 percent of the total value of EU exports of natural stone and natural stone products consisted of funeral and other art (55 percent), followed by tiles for flooring and paving (23 percent), slabs (11 percent), blocks (7 percent) and natural stone products for landscape design (4 percent).

Trade structure

Basically the trade structure consists of two segments: importers of semi-finished products (blocks and slabs) for further self-processing and importers of finished products.

Importers of semi-finished products are either medium or large companies in the stone processing industry (such as tile manufacturers or stonemasons) or wholesalers. Importers of finished products are either wholesalers or end-users (such as building contractors or garden centres).

Opportunities for exporters in developing countries

The opportunities for exporters in developing countries discussed in Chapter 9, are in the fields of raw blocks, tiles, flagstones, setts & curbstones, slabs, and funeral & other art.

1 PRODUCT CHARACTERISTICS

1.1 Product groups

The natural stone products discussed in this survey consist of the following five groups:

- Blocks of natural stone, either from siliceous stones (such as granite) or calcareous stones (such as marble);
- Slabs of natural stone, either from siliceous stones or calcareous stones;
- Natural stone products with a flat or even surface used for flooring & cladding, either from siliceous stones or calcareous stones (such as square tiles);
- Natural stone products used for urban or rural landscape design (such as setts, curbstones and flagstones) which cannot be sub-divided per stone type;
- Natural stone products used for religious and other art (such as tombstones and garden decorations).

Granite block

Granite slab

Floor tiles

Kerbstones

Funerary art

Garden art

1.2 Customs/statistical product classification

On January 1, 1988 a unified coding system was introduced to harmonise the trading classification systems used worldwide and to allow for improved international comparability of foreign trade statistics. This system, the Harmonised System (HS), is based on an eight-digit product classification.

An eight-digit list of the product groups is presented below, the last column provides the classification of the stone type from which the product is made.

Table 1.1 HS code classification of natural stone products

BLOCKS		
HS 25151100	Marble and travertine, crude or roughly trimmed	Calcareous
HS 25161100	Granite, crude or roughly trimmed	Siliceous
FLOORING & CLADDING		
HS 68022100	Marble, travertine and alabaster articles thereof, simply cut or sawn, with a flat or even surface	Calcareous
HS 68022200	Calcareous stone and articles thereof, simply cut or sawn, with a flat or even surface	Calcareous
HS 68022300	Granite and articles thereof, simply cut or sawn, with a flat or even surface	Siliceous
HS 68022900	Monumental or building stone and articles thereof, simply cut or sawn, with a flat or even surface	Siliceous
SLABS		
HS 25151220	Marble and travertine, merely cut, by sawing or otherwise, into slabs of a square or rectangular shape, of a thickness of > 4-25 cm	Calcareous
HS 25151250	Marble and travertine, merely cut, by sawing or otherwise, into blocks or slabs of a square or rectangular shape, of a thickness of > 4-25 cm	Calcareous
HS 25151290	Marble, travertine, merely cut, by sawing or otherwise, into blocks or slabs of a rectangular or square shape, of a thickness > 25 cm	Calcareous
HS 25161210	Granite, merely cut, by sawing or otherwise, into blocks or slabs of a square or rectangular shape, of a thickness of = < 25 cm	Siliceous
HS 25161290	Granite, merely cut, by sawing or otherwise, into blocks or slabs of a square or rectangular shape, of a thickness of > 25 cm (excl. Already with the characteristics of setts, curbstones and flagstones)	Siliceous
LANDSCAPE DESIGN		
HS 68010000	Setts, curbstones and flagstones, of natural stone (excl. Slate)	
FUNERAL & OTHER ART		
HS 68029110	Polished alabaster, in any form, decorated or otherwise worked, but not carved	Calcareous
HS 68029190	Marble, travertine and alabaster, in any form, polished, decorated or otherwise worked, carvings of marble, travertine or alabaster	Calcareous
HS 68029210	Calcareous stone other than marble, travertine and alabaster, in any form, polished, decorated or otherwise worked, but not carved	Calcareous
HS 68029290	Calcareous stone other than marble, travertine and alabaster, in any form, polished, decorated or otherwise worked and carved, carvings of calcareous stones	Calcareous
HS 68029310	Granite, in any form, polished, carved or otherwise processed, but not sculpted, of a net weight of > = 10 kg	Siliceous
HS 68029390	Granite, in any form, polished, carved or otherwise processed, of a net weight of < 10 kg; sculptures and statuary of granite	Siliceous
HS 68029910	Monumental or building stone, in any form, polished, carved or otherwise processed, but not sculpted, of a net weight of > = 10 kg	Siliceous
HS 68029990	Monumental or building stone, natural (excl. Calcareous stone, granite and slate), in various forms, polished, decorated or otherwise worked, net weight < 10 kg; carved articles of this stone	Siliceous

Source: Eurostat (2002)

A different classification is the PRODCOM classification. This classification is used by EU member-state to record the annual production values. The PRODCOM classification differs slightly from the HS classification.

Table 1.2. provides the PRODCOM codes, the description of the PRODCOM code and the corresponding HS codes. The category mentioned in the first column will be used in chapter 3, which provides information on consumption of natural stone and natural stone products.

Table 1.2 Discription of PRODCOM codes with corresponding HS codes

Category	PRODCOM	HS	Description PRODCOM classification
Intermediate Marble products	14.11.11.33	25151100	Marble and travertine; crude or roughly trimmed
	14.11.11.35	25151220 25151250	Marble and travertine merely cut into rectangular or square blocks or slabs of a thickness < = 25 cm thick
	14.11.11.37	25151290	Marble and travertine merely cut into rectangular or square blocks or slabs of a thickness > 25 cm
Intermediate Granite products	14.11.12.33	25161100	Granite; crude or roughly trimmed
	14.11.12.35	25161210	Granite merely cut into rectangular (incl. square) blocks or slabs of a thickness < = 25 cm
	14.11.12.37	25161290	Granite merely cut into rectangular (incl. square) blocks or slabs of a thickness > 25 cm
Worked calcareous products	26.70.11.00	68022100 68029110 68029190	Worked monumental/building stone & articles thereof, in marble, travertine & alabaster excl. tiles, cubes/similar articles, largest surface < $7cm^2$, setts, kerbstones, flagstones
	26.70.12.40	68022200 68029210 68029290	Other calcareous stone, cut/sawn, flat/even surface, otherwise worked
Setts, kerbstones and flagstones	26.70.12.10	68010000	Natural stone setts; kerbstones and flagstones (excl. of slate)
Worked granite products	26.70.12.60	68022300 68029310 68029390	Worked monumental or building stone & articles thereof, of granite excl. tiles, cubes & similar articles, largest surface area is < $7cm^2$, setts, kerbstones & flagstones
	26.70.12.80	68022900 68029910 68029990	Worked monumental or building stone and articles thereof (excl. of calcareous stone; granite or slate, tiles; cubes and similar articles; of which the largest surface area is < $7\ cm^2$)

Source: PRODCOM (2002)

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995 the EU has consisted of 15 member states. Ten new countries will join the European Union in 2004. Negotiations are in progress with a number of other candidate member states.

In 2002, the size of the EU population totalled 379.4 million; the average GDP per capita amounted to approximately € 21,193 in 2000[1].
The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in the EU countries.
As the unification allows free movement of capital, goods, services and people, nearly all internal borders have to all intents been removed. Goods produced or imported into one member state can be moved around between other member states without restrictions.
A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, not all the regulations have yet been harmonised. Work is in progress in the fields of environmental pollution, health, safety, quality and education. For more information about harmonisation of the regulations visit AccessGuide, CBI's database on non tariff trade barriers at www.cbi.nl/accessguide

On 1 January 1999, the euro became the legal currency within twelve EU member states: Austria, Belgium, Finland, France, Germany, Greece, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. In 2002 circulation of euro coins and banknotes replaced national currency in these countries. Denmark, United Kingdom and Sweden have decided not to participate in the Euro.

The most recent Eurostat trade statistics quoted in this survey are from the year 2001. In this market survey, the € is the basic currency unit used to indicate value. Values for dates before 1999 are expressed in dollars.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about EUR 100,000.
As a consequence, although figures for trade between the EU and the rest of the world are reasonably accurate represented, trade within the EU is generally underestimated.
For more information on the EU market, please refer to the CBI's manual Exporting to the European Union.

The survey regularly goes into the specific situation of five European countries. These countries are The Netherlands, Belgium & Luxembourg, Italy, Germany and Spain. The reason for the selection of these specific countries is that they are the top five importers of natural stone products originating from developing countries in the EU. In 2001, the selected countries accounted for 82 percent of total EU imports of natural stone and natural stone products from developing countries.

Exchange rates of EU currencies in US$

Country	Currency	1997	1998	1999	2000	2001	June 2002
European Union	ECU	1.13	1.12	-	-	-	
	€	-	-	1.06	0.92	0.89	0.95
Denmark	DKr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	SKr	0.13	0.13	0.12	0.11	0.10	0.10
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.45	1.48

Source: CBS Statline (July 2002)

[1] *http://www.economagic.com/em-cgi/data.exe/ecb/t5-01-01+1*

3 CONSUMPTION

3.1 Market size

At a global market level, the natural stone industry can be characterised by stagnating demand, increasing competition and expanding supply, which is fuelled by technical progress in quarrying technology. This causes a downward pressure on the general price level.
China is the largest consumer of natural stone and natural stone products worldwide (10 percent), followed by Italy (8 percent), the USA (7 percent), and Germany and Spain (both 6 percent).
Europe's share of the total World consumption lies around 30 percent. Moreover, within the European Union, total consumption of natural stone increased by more than 20 percent since 1990[2].

The consumption of natural stone is highly dependent upon the construction industry. Overall, the construction market in Western Europe increased by 1.7 percent per year on average over the period 1996 to 2000, but the weak economic growth in Western Europe is strongly reflected in the forecast for the sector.
The construction industry is expected to grow by only 0.3 percent in 2001, and only a moderate recovery of 1.0 to 1.5 percent is expected for 2004 and 2005.

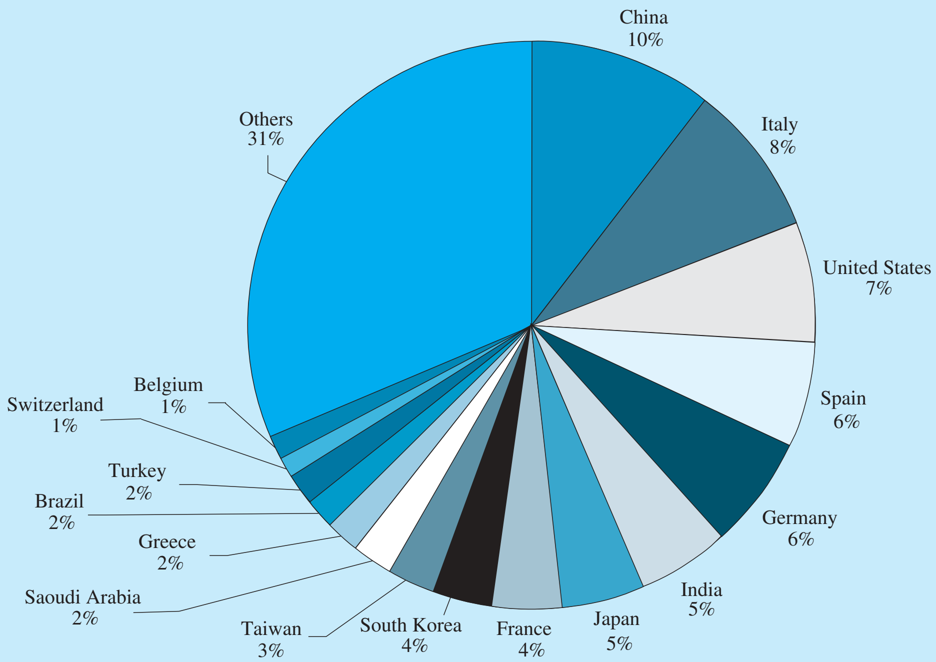
Table 3.1 Major European consuming countries and their share in world consumption, 2001

Country	Consumption of natural Stone ('000 square metres)	Share in world consumption
Italy	59,780	8.4%
Spain	45,080	6.4%
Germany	43,060	6.1%
France	26,180	3.7%
Greece	14,340	2.0%
Belgium	10,500	1.5%
Portugal	9.380	1.2%
Netherlands	8,470	1.2%
Austria	7.190	1.0%
Finland	3,400	0.5%

Source: Stone 2002, World Marketing Handbook

From table 3.1 and figure 3.1, it becomes clear that Italy, Spain and Germany are the largest consuming countries within the European Union.

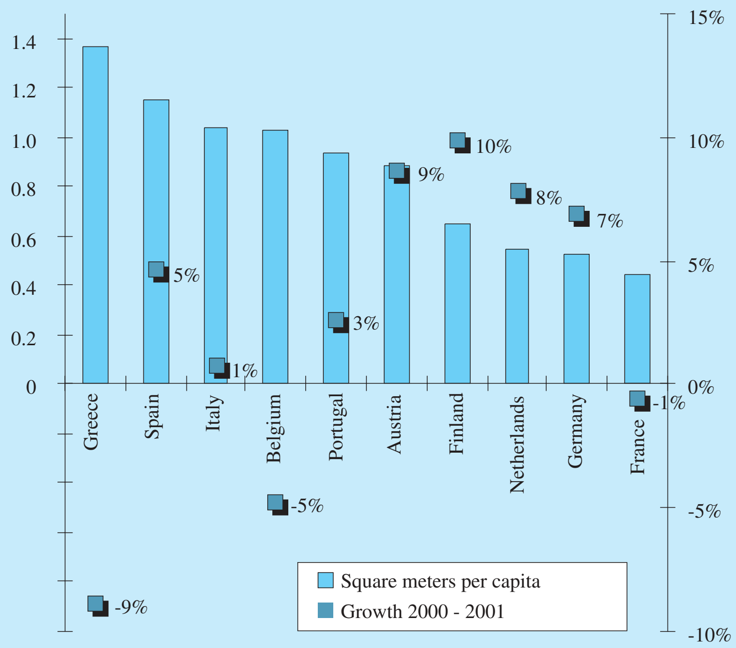
Figure 3.1 Distribution of world natural stone consumption in volume, 2001



Source: Stone 2002, World marketing Handbook

[2] *World Stone Report*

Figure 3.2 Natural stone consumption per capita, square metres per person and growth percentage, 2001



Source: Stone report 2002

An overview of per capita consumption and the growth rate per country is presented in figure 3.2.
Greece, Spain, Italy and Belgium consume 1 square meter of natural stone or more per capita. Germany, France and the Netherlands consume between 0.4 and 0.5 square meters of natural stone per capita. The highest growth rates are found in Finland (10 percent), Austria (9 percent) and the Netherlands (8 percent).

Different income levels cannot explain these differences in per capita consumption. Although income plays a role, factors like historical and cultural traditions of a country and climate (a warm climate is better suited for natural stone) play a significant role in explaining differences in national per capita consumption. Countries with a strong tradition in using natural stone are, for instance, Greece, Italy, Spain and Portugal.

Below, Eurostat data on consumption value for Italy, Spain, Belgium, the Netherlands and Germany are presented for 1999 and 2000. These data should be treated with caution since the presented (apparent) consumption levels are derived from production and trade data. When production data are unavailable, production values are nullified and the estimated consumption is based on the balance of trade.
This represents the minimum consumption. As not all trade within the EU is registered, national consumption is overestimated in those cases where a country sells substantial parts of its production in relatively small quantities within the EU.

The value of the consumption figures contained in figures 3.3, 3.4, 3.5, and 3.6 relates to the comparison of relative sizes between countries rather than their absolute value.

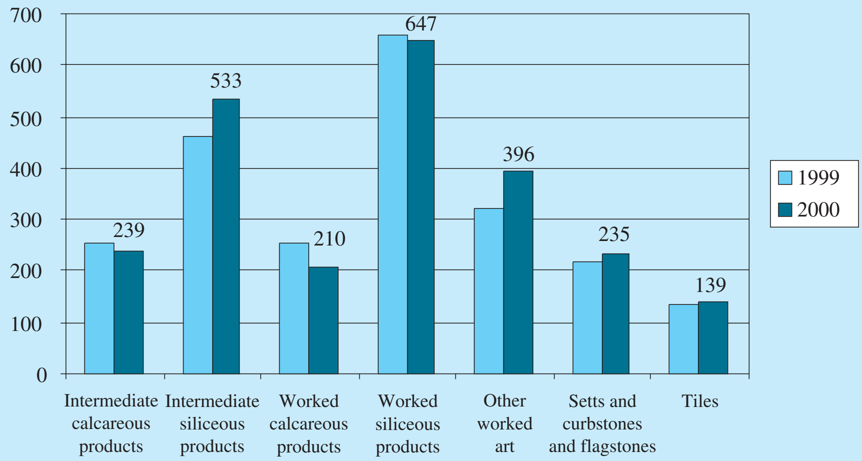
It should be noted that in figures 3.3, 3.4, 3.5, and 3.6 there is a distinct difference between the consumption of intermediate products (both granite and marble) and finished products. The “consumption” of blocks and slabs is registered in the first two columns whereas the consumption of finished products is registered in the remaining three columns.
The “consumers” of intermediate products are firms that are involved in processing natural stone. Therefore, it is not valid to add up all seven columns in order to arrive at a country’s total natural stone consumption.

Italy

Italy is the largest consumer of natural stone in the EU. The per capita consumption amounts to 1 squared metre per capita, which ranks high among the European countries. Italy has a long history in the use of natural stone, which can be explained by the local availability of natural stone and the warm Mediterranean climate.

Being a major producer (please refer to chapter 4) Italian consumption is for a substantial part covered by its own production. Close to half of total Italian production is consumed in the domestic market.

Figure 3.3 Italian estimated* consumption of natural stone and natural stone products, 1999–2000 (million €)



Source: Eurostat (2002) * (consumption = production + import – export)

Figure 3.3 shows that Italian consumption increased between 1999 and 2000 for intermediate siliceous products, other worked art and setts, curbstones and flagstones. Consumption decreased for intermediate calcareous products, worked calcareous products and worked siliceous products, and consumption remained the same for tiles.

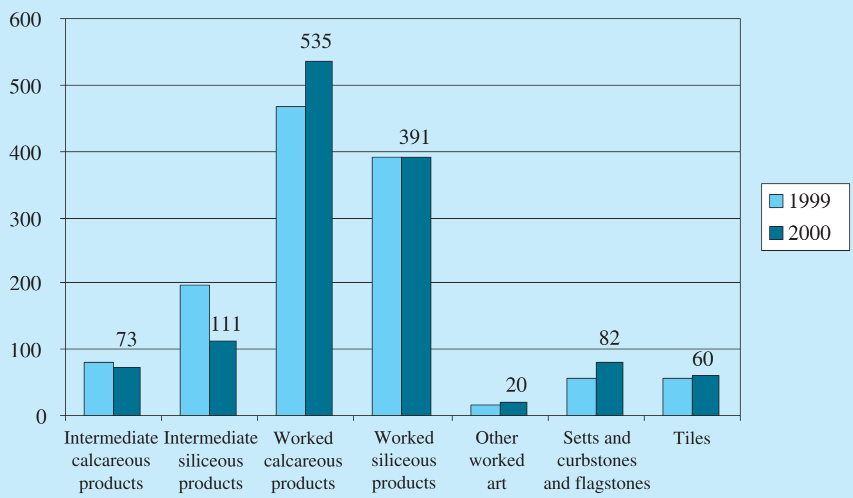
Compared to the other selected countries, Italy is the largest consumer of intermediate natural stone products like blocks and slabs. Within the EU, Italy has the most developed natural stone industry.
Many blocks (intermediate product) that are transported to Europe are sawn into tiles (or other finished products). This explains the high "consumption" of intermediate products.

Spain

Spain is the third largest consumer of natural stone in the EU. The per capita consumption amounts to 1.1 square metre per capita ranking high among the European countries. Spain has a long history in the use of natural stone, which can be explained by the local availability of natural stone and the warm Mediterranean climate.
Being a major producer (the second largest in the EU), Spain consumes a substantial part of its domestic production.

After Italy, Spain is the largest consumer of intermediate natural stone products like blocks and slabs. Within the EU, Spain has the second largest natural stone industry after Italy, which explains the

Figure 3.4 Spanish estimated* consumption of natural stone and natural stone products, 1999–2000 (million €)



Source: Eurostat (2002) * (consumption = production + import – export) relative high "consumption" of intermediate natural stone products. Furthermore it should be noted that for all product groups, except the intermediate groups, consumption of natural stone has either increased or remained at the same level between 1999 and 2000, as depicted in figure 3.2.

Belgium

Belgium is a reasonable large consumer of natural stone and natural stone products, which is partly explained by the local availability of natural stone. The per capita consumption amounts to 1 square metres per capita ranking high among the European countries.
Belgian natural stone production consists mainly of the type "petit granit" which is quarried locally.
As the local supply of natural stone is limited to granite, Belgian consumption depends for a substantial part on imports.

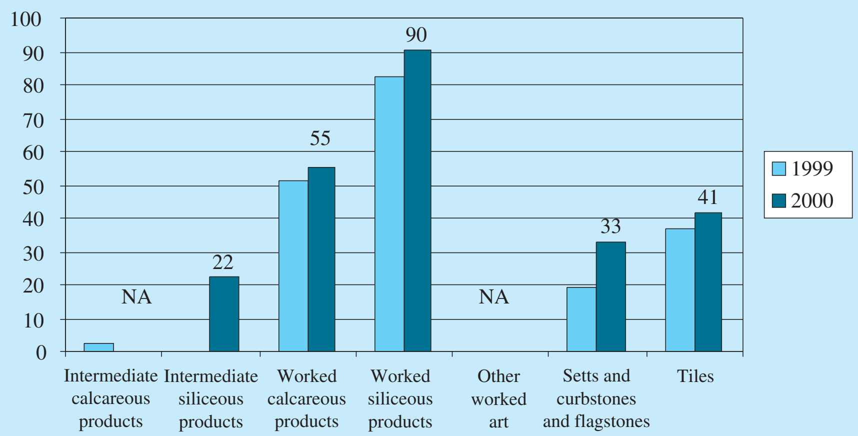
The figures presented in figure 3.5 suggest an increase in Belgian natural stone consumption, which is in line with the positive growth as depicted in figure 3.2. Belgian "consumption" of intermediate natural stone products is insignificant compared to the "consumption" of intermediates by Italy and Spain.

The Netherlands

The Netherlands is a moderate consumer of natural stone and natural stone products. The per capita consumption amounts to 0.5 square metres per capita, ranking quite low among the European countries.

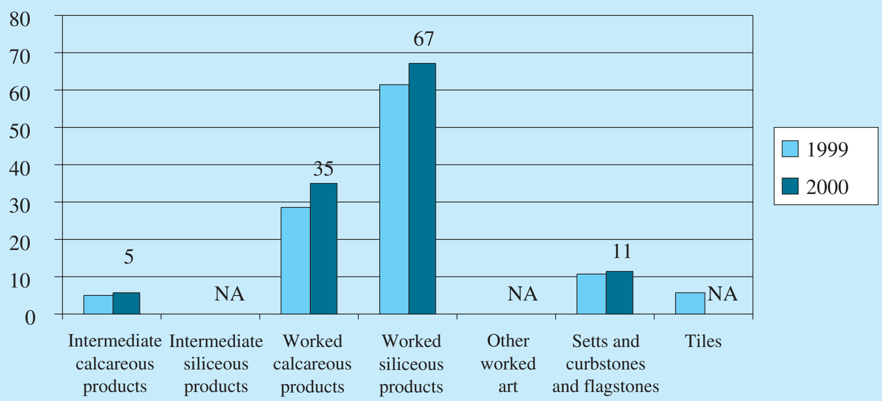
The low per capita consumption can be explained by the virtual absence of natural stone in the Netherlands, the lack of tradition in using natural stone in the building industry and the relative cold climate of North-western Europe.

Figure 3.5 Belgian estimated* consumption of natural stone and natural stone products, 1999–2000 (million €)



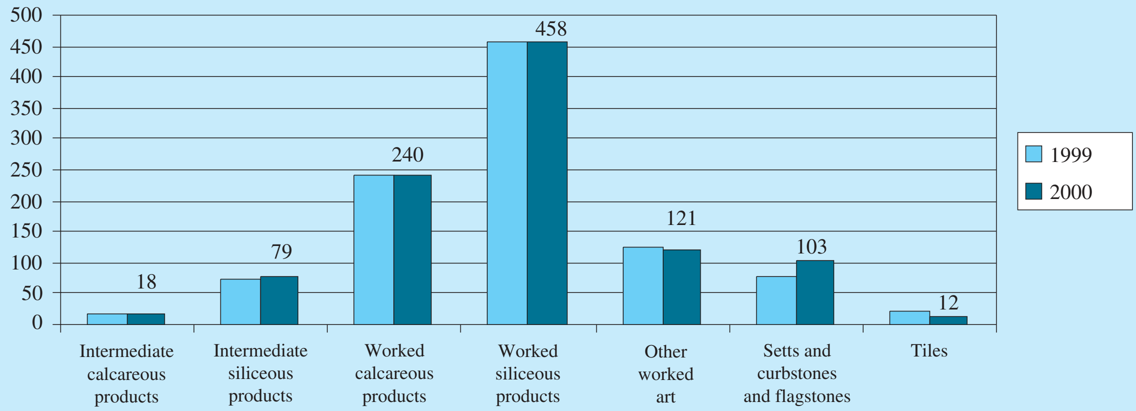
Source: Eurostat (2002) * (consumption = production + import – export)

Figure 3.6 Dutch estimated* consumption of natural stone and natural stone products, 1999–2000 (million €)



Source: Eurostat (2002) * (consumption = production + import – export)

Figure 3.7 German estimated* consumption of natural stone and natural stone products 1999–2000 (million €)



Source: Eurostat (2002) * (consumption = production + import – export)

Although data for some product groups are not available, figure 3.6 indicates that Dutch consumption of natural stone increased in value between 1999 and 2000, which is also shown in figure 3.2.

Germany

Germany is the second largest consumer of natural stone and natural stone products in the EU.
The per capita consumption however amounts to 0.5 square metres per capita ranking quite low among the European countries, which may be explained by the relatively cold climate of North-Western Europe.

Local production amounts to approximately 35 percent of domestic consumption. Between 1999 and 2000, German consumption stabilized in value, confirming the stabilisation as presented in figure 3.2.

Natural stone in Germany is mostly used in the building industry, both for the use of floor slabs, standard tiles, and exterior facades. According to a recent trend study for the German market, the appreciation of natural, environmentally compatible and healthy products will continue to grow in Germany in the coming years.

3.2. Market segmentation

Market segments can be distinguished by the different end-users of natural stone and natural stone products. Four different end-users are identified:
- Natural stone processing industry;
- Building industry;
- Funerary industry;
- Consumers market.

An important distinction that has to be made within the above segmentation is the distinction between the industries using semi-finished products as input (i.e. the natural stone processing industry) and the industries using finished products as input (i.e. the remaining segments). The natural stone processing industry purchases intermediates like blocks and slabs and produces final products like tiles and kitchen counter tops.

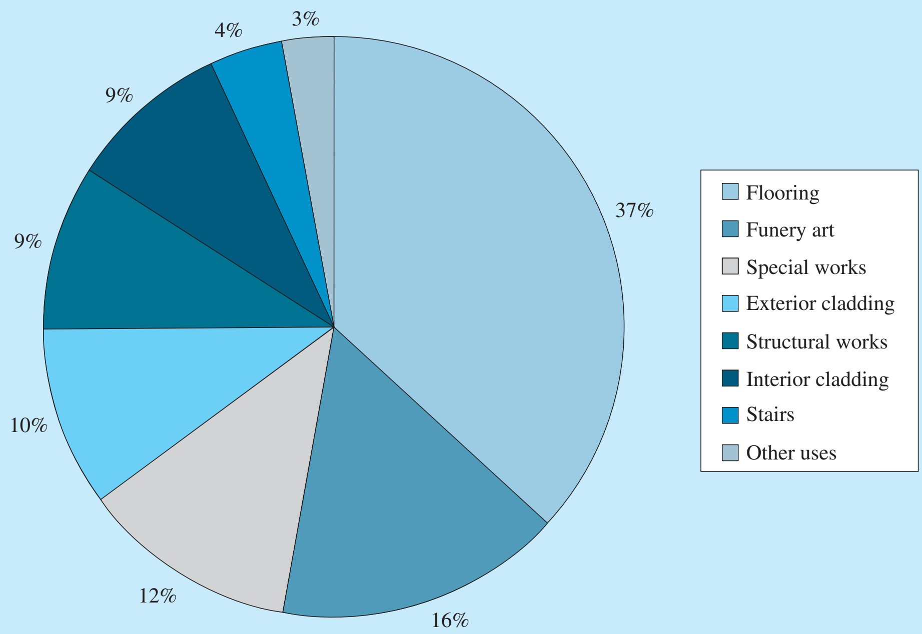
The natural stone processing industry is an important industry for producers of semi-finished products i.e. natural stone blocks and slabs. The processing industry consists of firms producing all kinds of natural stone products. The processing industry ranges from small, specialised firms producing custom made fireplaces to large firms producing natural stone tiles.

The customers of the natural stone processing industry can be the building industry, the funerary market or the consumers market. The products that can be sold to the processing industry are:
- Slabs
- Raw blocks

The building industry is by far the largest consumer of finished natural stone products (close to 80 percent). Products that are sold in this market are:
- All kinds of natural stone floor and wall tiles for interior and exterior coverings;
- Custom made finished products like kitchen countertops, balustrades, fireplaces, and fountains;
- Municipal furnishing like setts and kerbstones; and
- Garden and landscape construction like tiles and flagstones.

The funerary industry is the second largest consumer of finished natural stone products (around 15 percent). Products that are sold in this market are mainly:
- Traditional gravestones; and
- Urns.

Figure 3.9 Percentage of natural stone main uses for World consumption in volume, 1999.



Source: Stone 2002

The consumer market (mainly garden centres) has a relative small consumption of finished natural stone products (roughly 5 percent). The market mainly consists of natural stone products used for garden decorations like:

- Flagstones; and
- Garden art such as birdhouses, fountains, decorative balls and vases.

On a global level estimates are available that make a distinction between the different end-uses of natural stone. Figure 3.10 presents an overview of the different main uses of natural stone. Flooring represents the largest share (36 percent) followed by funerary art (15 percent), special works such as balustrades, columns, fireplaces, fountains (12 percent), structural works such as setts and kerbstones (10 percent), interior cladding (10 percent), exterior cladding (10 percent), stairs (4 percent) and other uses (4 percent).

Products destined for the building industry are structural works, cladding (interior and exterior), stairs, flooring and a part of the category "special works".
Products destined for the funerary industry is indicated as "funerary art". Products for the consumer markets consist of the category "other uses" and a part of the category "special works".

3.3 Consumption patterns and trends

Consumption of natural stone and natural stone products is greatly dependent on the activities in the building industry, which in turn is strongly related to economic growth. For the short term, a slow down of the construction sector is expected.
Nevertheless, natural stone is increasingly used in the construction sector. The development of stone consumption in the construction sector is expected to vary widely across regions in the world. Higher growth rates in consumption are forecast for Eastern Europe, after 2003. Growth in Europe, which to a large extent already has a traditional natural stone culture, is expected to be moderate.

As from mid 2000, the EU economy started to slow down. The European Commission's Directorate General for Economic and Financial Affairs, expects a range of 0.1% to 0.4% for GDP growth in the fourth quarter of 2002 (percentage compared to the previous quarter). For the first quarter of 2003, quarter on quarter growth is forecast to be in the range of -0.1 to 0.3%.

As the building industry is an important market for natural stone products, developments in the building industry are an important indicator of future demand for natural stone products. Euroconstruct, which presents European building growth forecasts, expected a growth of 1.4 percent in 2002-2003 due to the stagnating economy in Western Europe[3]. However, the weak economic growth in Western Europe was even stronger reflected than expected in these forecast figures[4].

[3] *Euroconstruct 2000.*
[4] *Euroconstruct 2002.*

Therefore, the construction industry is expected to grow by only 0.3 percent in 2003, with a moderate recovery of 1.0 to 1.5 percent for 2004 and 2005.

Trends
An overall trend is one of increasing per capita consumption of natural stone and natural stone products within the EU. This increasing consumption can be explained by the "discovery" of natural stone products as an alternative building material by countries without a long tradition in the application of natural stone, for example the Netherlands. This "discovery" is fuelled by the decrease in the average price of natural stone products which make natural stone products an affordable alternative for competing products like woollen carpets, wooden kitchen countertops and ceramic tiles.

EU imports of natural stone and natural stone products from developing countries have increased.
The increased consumption of natural stone in the EU and the competitive position of producers can explain the increased imports from developing countries.
Their low-cost local labour and the good quality of the natural stone mainly underlie the competitive position of developing countries.

The demand for kitchen countertops of natural stone increased in 2001, but this trend is currently decreasing. Nevertheless, this market is still large.
Demand for kitchen counter tops fuels the demand for slabs (often with a thickness of 3 cm), which are processed by the European stonemasons.
In the Netherlands and Belgium, there is a trend towards the use a grey hardstone for counter tops.
This cement-coloured stone is mainly found in Western Europe.

As funerary art's demand is influenced by the number of deaths, this rate increased due to ageing of the population. On the other hand, the demand for funerary art is negatively influenced by an increasing number of cremations.
However, cremations also demand urns made of natural stone and well-designed interment places for individual urns and urn monuments. For Germany it can be said that the market for gravestones has been rather stable in recent years indicating that both trends neutralise each other.

It is difficult to formulate a general trend on fashion colours. Natural earth colours like dark brown and forest green may be temporarily popular and are then superseded by beige, pale pastel, or violet.
These switches may be based on a "getting back to nature" trend, following a "design statement" by a successful architect or the development of a new source of material. Concerning tiles, it can be stated that classical colours like, white, beige, brown and black account for a large percentage of the trade. Currently, there is a trend to use grey colours. Due to renovation of old houses, and the trend to make newer houses look old, 'washed' marble is becoming increasingly popular, as it gives the impression of a very old floor.

In a recent article from Litos on the India Gravestone Industry (please refer to *http://www.litosonline.com*) it was stated that "Paradiso" is the most popular granite used in the funerary art industry. Other popular granites are "Red Multicolour", "Vizag Blue", "Tropical Green", "Viscount White", and "Regal Black". In Europe, especially Germany "Paradiso" and "Vizag Blue" are preferred, while in the United Kingdom it is estimated that about 80 percent of the gravestones are of black colour.

Concerning technology an interesting recent development is the use of laser technology in order to obtain an anti-slip surface on polished natural stone tiles.
These machines "chisel" 8,000 to 10,000 micro craters per second in the stones by which various degrees of anti-slip effect can be achieved, depending on the spacing and size of the individual craters. The processing only slightly reduces the gloss and brilliant colours of the polished stones. The mini craters are also designed so that the slabs are still easy to clean.

4 PRODUCTION

National production figures are scarce and scattered across sources. Overall it can be stated that at the global level, production figures have risen in the last years and that an increasing number of countries are involved in the production process. As reported in the Stone Report 2002, worldwide production of natural stone increased by almost 30 percent in the past ten years. This figure includes the production of slate and sandstone, which are not part of the natural stone products selected for this survey.

Production of both marble and granite increased tremendously over the last decades, which can be attributed to new production techniques, making the exploitation of (in particular harder) stone material much easier.

It would be interesting to analyse production according to type of stone products as described in chapter one. However, it is not possible to trace a precise picture of blocks and slabs “final destination”.

Total production of finished natural stone products in the European Union countries in 2001 was nearly 14 million tonnes (around 40 percent of world stone production). The main producers of natural stone products in Europe are Italy and Spain with a production of about 5,880 thousand tonnes (42 percent of total EU production) and 3,273 tonnes (24 percent) respectively followed by Portugal (9 percent), France (7 percent) and Greece (6 percent).

Italy deserves special mention not only because of the country's sizeable production and processing industry, but also because of the central role Italian traders play in the marketing of natural stone. Italy is home to some of the largest stone wholesalers, who stock enormous ranges of stone colours, styles, and qualities.
Because these marketing giants carry huge stone inventories, they tend to buy domestic and imported standard raw blocks instead of more expensive processed slabs or tiles to reduce operating costs and retain processing flexibility. Not surprisingly, two of the three major industry trade fairs are in Carrara and Verona (the third is held in Germany). In general it can be stated that large firms are rare in the stone processing industry, most firms in the stone processing industry tend to be small, employing about 20 workers.

In general, natural stone producing developing countries will have to base their competitiveness in value added natural stone products on one of the following aspects:
- Excellent quality of natural stone resources
- Low-cost local inputs (notably natural stone and labour) to compensate for the high costs of imported inputs (sawing installations, polishing installations);
- Higher total productivity (measured across all factors of production i.e. natural resources (stone), labour, capital, and knowledge);
- Superior quality of products (including design); or preferably
- A balanced combination of all of the above factors.

Figure 4.1 Production of EU countries in 2001, (in thousands of tonnes) and growth between 2000-2001

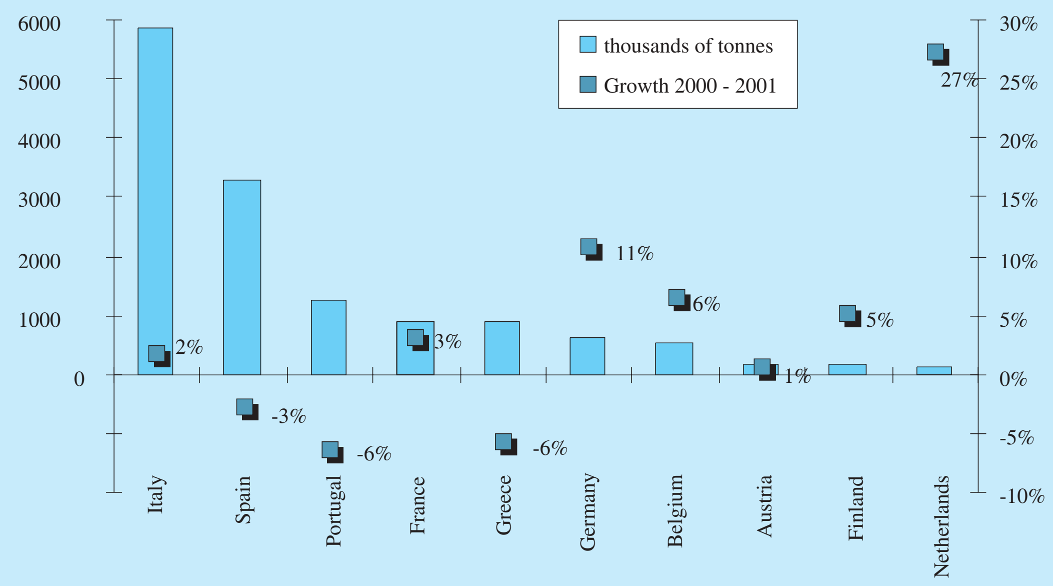


Table 4.1 Typical stone industry investment profile

Investing company profile	Medium- and large dimension stone quarrying and processing firms
Recipient profile	High-quality raw material deposits with adequate transportation infrastructure
Method of entry	Greenfield and acquisition in quarrying, joint venture in processing
Type of investment	Equity, technology, marketing expertise
Typical investment (US$ million)	2-5
Typical employment per project	40-80
Orientation of investment	Export
Factor motivating FDI	Access to raw materials; low processing costs for established, large deposits
Typical location requirements	High-quality raw material
	Low-cost labour
	Transportation access
	Water

Source: Namibia trade and investment mission, 1998

The relationship between EU producers/traders and developing countries can take shape through international trade, foreign direct investment (FDI) or a joint-venture. In the trade relationship, the European company looks for a good price/quality ratio of the intermediate or finished product offered by the supplier. FDI often concerns investments in quarries and processing facilities. The location should be able to produce between 150,000 and 235,000 square meters of granite tiles per year. This project size is typical of investments such as the new facilities set up by Jain Granites and Projects, and ACE Stonecraft in India.

Joint ventures between European producers and companies in developing countries are increasing. Recent examples include the Italian firms Internazionale Graniti, which has formed a joint venture with an Indian company. India has seen 25 new granite projects come on-stream since the early 1990s.

Investors tend to look for established local partners who can provide cost advantages through lower labour and transport costs.

However, processing investments aimed at specific deposits in developing countries are generally undertaken only after those deposits have developed a reputation and established markets based on colour, style, and quality, and are sufficiently large to warrant the investment. New, unproven, and small deposits generally export to overseas distributors and processors.

Table 4.1 presents a stone industry investment profile as set-up by the Namibian foreign direct investment promotion agency. The profile draws a rough picture of a EU company (the investor), the recipient company, the type and size of investment, the factors motivating the investment, and the location requirements.

5 IMPORTS

Trade figures quoted in this section must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the European Single Market on 1 January 1993. Prior to that date, trade was registered by means of compulsory customs procedures at border crossings but, with the removal of the intra-EU borders, this is no longer the case. Statistical bodies such as Eurostat can no longer depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. In conclusion, while figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated. Therefore, the value of the trade figures in this section lies primarily in the comparison of relative sizes rather than their absolute value.

The statistics specify total imports, imports originating from the EU Member States and non-EU countries, both in volumes and values. Developing countries, as defined by the OECD, are listed in Appendix 9. Appendix 1 lists import statistics of the EU and the selected markets within the EU and gives detailed breakdowns of the statistics by product group and supplying country.

5.1 Total imports

In 2001, total EU imports of natural stone and natural stone products reached a volume of 10,483 thousand tonnes, which represented a value of € 2,188 million. An overview of EU imports of natural stone and natural stone and natural stone products is presented in figure 5.1.

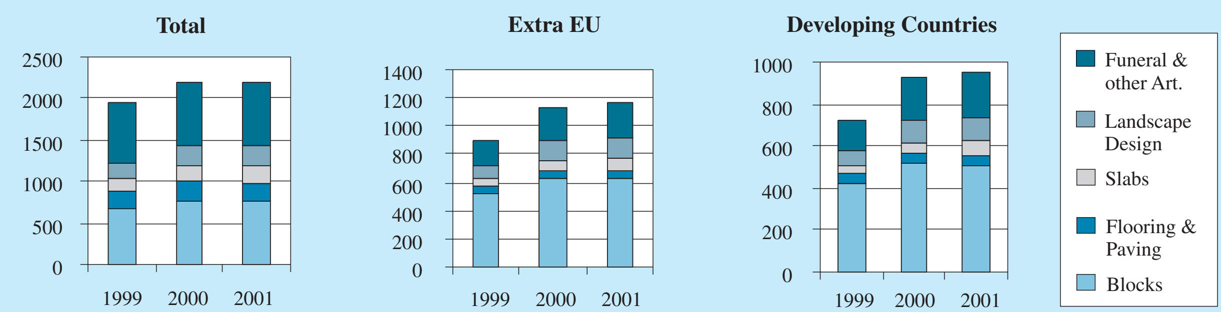
Between 1999 and 2001 the value of EU imports increased by 13 percent and the volume 9 percent. Changes in volume and value of imports were very different for the respective Member States, however. Differences across product groups with respect to changes in volume and value between EU Member States will be discussed in this section for Italy, Germany, Spain, Belgium & Luxembourg and the Netherlands.

In 2001, extra-EU imports accounted for more than half of total EU imports (53 percent of value and 58 percent of volume originated from outside the EU), with developing countries accounting for 43 percent of the total value of EU imports. The share of non-EU countries in EU imports has risen considerably from 46 percent in 1999 to 53 percent in 2001. Also the share of developing countries in total EU imports increased between 1999 and 2001 by 6.2 percent to 43.4 percent in 2001. Italy, India, China, Brazil and Spain are the top 5 suppliers to the EU, supplying 3,720 thousand tonnes with a value of € 1,271 million.

Developing countries accounted for 43.4 percent of the total value and 37 percent of the total volume of EU imports. The most important developing countries, as suppliers of the EU, after India (€ 275 million), are China (€ 198 million), Brazil (€ 176 million), South Africa (€ 102 million) and Turkey (€ 66 million).

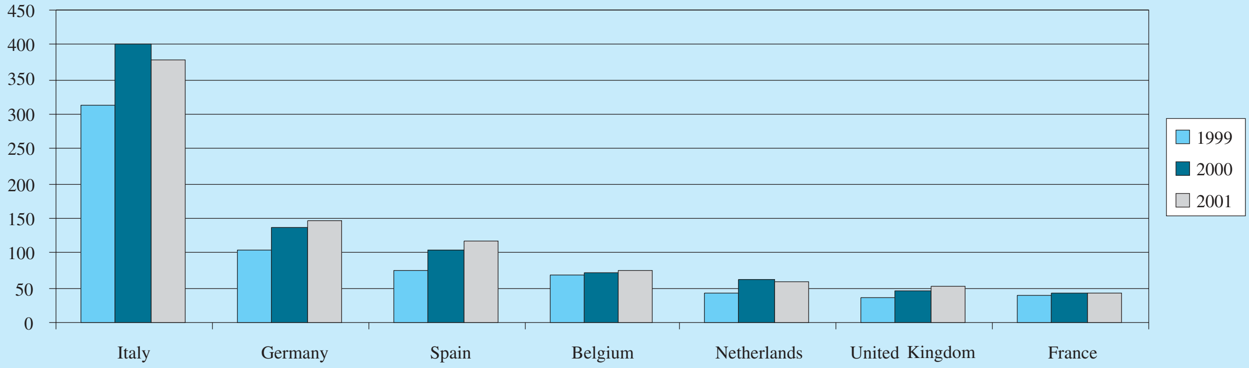
The total value of developing countries' exports to the EU mainly consists of blocks (53 percent), followed by funeral and other art (23 percent), natural stone products for landscape design (12 percent), slabs (6 percent), and tiles for flooring and cladding (7 percent).

Fig. 5.1 Overview of EU imports of natural stone and natural stone products in million €, 1999–2001



Source: Eurostat 2002

Fig. 5.2 **Largest EU importers of natural stone and natural stone products originating from developing countries in million €, 2001**



Source: Eurostat 2002

Table 5.1 **Growth in imports of natural stone and natural stone products originating from developing countries, 1999-2001**

	Europe	Italy	Germany	Spain	Belgium	Netherlands	UK
Value	32%	21%	41%	54%	7%	41%	47%
Volume	19%	8%	17%	41%	-2%	37%	98%

Source: Eurostat (2002)

Total EU imports of natural stone and natural stone products from developing countries amounted to € 949 million in 2001 with a volume of 3,865 thousand tonnes. Since 1999, EU imports from developing countries increased by 32 percent in value and by 19 percent in volume. As shown in figure 5.2, Italy is the largest EU importer of natural stone and natural stone products originating from developing countries, with imports valued at € 379 million in 2001.

Since 1999, Italian imports from developing countries increased by 21 percent in value and by 8 percent in volume. Germany is the second largest EU importer of natural stone and natural stone products originating from developing countries, with imports valued at € 147 million in 2001. Compared to 1999 its imports increased by 41 percent in value and by 17 percent in volume. Spain is the third largest importer of natural stone and natural stone products (€ 117 million) followed by Belgium (€ 75 million), the Netherlands (€ 60 million) and the UK (€ 51 million).

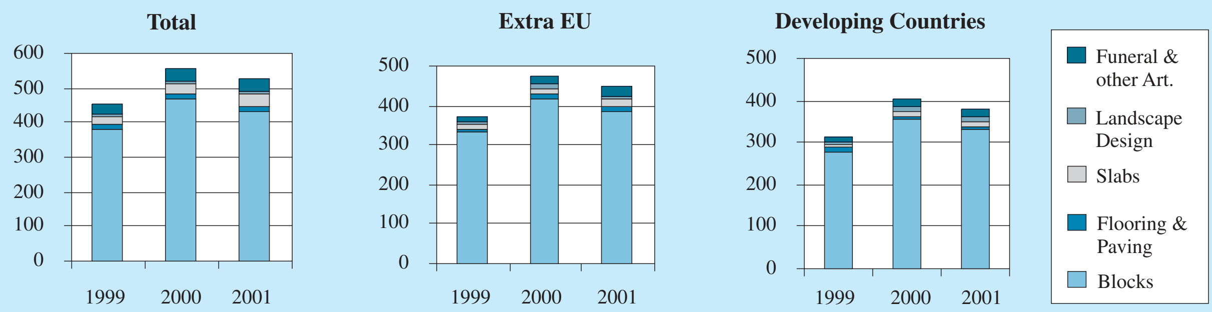
Table 5.1 provides an overview of the growth of imports of natural stone and natural stone products originating from developing countries during the 1999-2001 period for the six largest EU importers.

Italy

In 2001, Italian imports of natural stone and natural stone products amounted to € 527 million and a total volume of 2,213 thousand tonnes. Compared to 1999, this was a 16 percent increase in value and a 3 percent increase in volume. Imports from developing countries increased by 21 percent in value and 8 percent in volume, to respectively € 331 million and 1,459 thousand tonnes. The share of developing countries in Italian imports between 1999 and 2001 also increased by 4 percent to 72 percent. Imports of blocks make up the largest share (82 percent) of total Italian imports, which is explained by the presence of a large stone processing industry that processes raw blocks into slabs or finished products.

Table 5.2 presents an overview of Italian imports of natural stone and natural stone products by product group. Table 5.2 shows positive growth with the exception of one product group. Italian imports of slabs recorded the highest growth between 1999 and 2001 (47 percent) followed by landscape design (45 percent), funeral and other art (22 percent) and blocks (10 percent). Only the product group tiles for flooring & cladding showed negative growth (-7 percent).

Figure 5.3 **Overview of Italian imports. The figures represented Italian imports from the EU, imports outside the EU, and imports from developing countries in million €, 1999-2001**



Source: Eurostat (2002)

Table 5.2 Overview of statistics on Italian imports of natural stone and natural stone products

	Blocks	Flooring & cladding	Slabs	Funeral & other art	Landscape design
Share of total value imports of natural stone & natural stone products	82%	3%	6%	7%	2%
Value (million €)	433	15	33	34	12
Volume ('000 tonnes)	1,928	33	126	57	69
Growth value (' 99 - ' 01)	14%	-7%	47%	22%	45%
Growth volume (' 99 - ' 01)	0%	-13%	41%	8%	22%
Share siliceous natural stone	69%	1%	3%	3%	-
Value siliceous (million €)	363	5	14	15	-
Volume siliceous ('000)	1,565	14	60	28	-
Growth value siliceous (' 99 - ' 01)	10%	2%	56%	14%	-
Growth volume siliceous (' 99 - ' 01)	-5%	22%	36%	0%	-
Share calcareous natural stone	13%	2%	4%	4%	-
Value calcareous (million €)	69	11	19	20	-
Volume calcareous ('000)	363	19	65	30	-
Growth value calcareous (' 99 - ' 01)	34%	-10%	40%	29%	-
Growth volume calcareous (' 99 - ' 01)	32%	-29%	45%	18%	-

Source: Eurostat (2002)

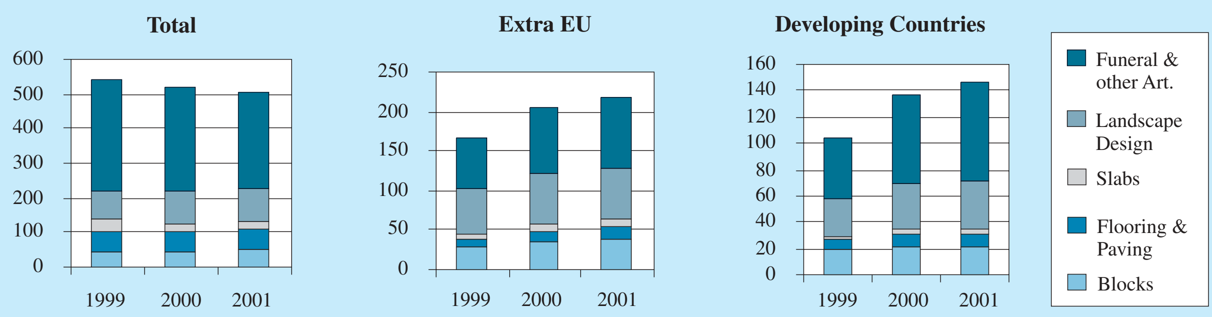
In the Italian imports of raw blocks it has to be noted that the imports of siliceous stone represents the bulk of total Italian imports of raw blocks. In the remaining product groups, this difference is far less distinct.

Germany

In 2001, German imports of natural stone amounted to € 504 million, representing a total volume of 2,052 thousand tonnes. Compared to 1999, this was a decrease of 7 percent in value but a 1 percent increase in volume. Imports from developing countries increased by 41 percent in value and 17 percent in volume to respectively € 147 million and 611 thousand tonnes. Also the share of developing countries in German imports between 1999 and 2001 increased by 10 percent to 29 percent. Imports of funeral and other art constitute the largest share (56 percent) of total German imports.

Table 5.3 presents an overview of German imports of natural stone and natural stone products by product group. Table 5.3 shows negative growth (in value) in three of the five product groups, which is explained by

Figure 5.4 Overview of German imports. The figures represented German imports from the EU, imports outside the EU, and imports from developing countries in million €, 1999-2001



Source: Eurostat (2002

Table 5.3 Overview of statistics on German imports of natural stone and natural stone products

	Blocks	Flooring & cladding	Slabs	Funeral & other art	Landscape design
Share of total value imports of natural stone & natural stone products	10%	12%	4%	56%	18%
Value (million €)	51	60	22	281	90
Volume ('000 tonnes)	418	103	60	450	1,021
Growth value (' 99 - ' 01)	22%	-5%	-28%	-13%	9%
Growth volume (' 99 - ' 01)	56%	-9%	-40%	-7%	-4%
Share siliceous natural stone	10%	7%	4%	46%	-
Value siliceous (million €)	50	35	19	230	-
Volume siliceous ('000)	414	72	50	383	-
Growth value siliceous (' 99 - ' 01)	25%	-8%	-27%	-8%	-
Growth volume siliceous (' 99 - ' 01)	59%	-9%	-43%	0%	-
Share calcareous natural stone	0%	5%	1%	10%	-
Value calcareous (million €)	1	25	3	51	-
Volume calcareous ('000)	4	32	9	67	-
Growth value calcareous (' 99 - ' 01)	-38%	-2%	-36%	-29%	-
Growth volume calcareous (' 99 - ' 01)	-45%	-11%	-23%	-33%	-

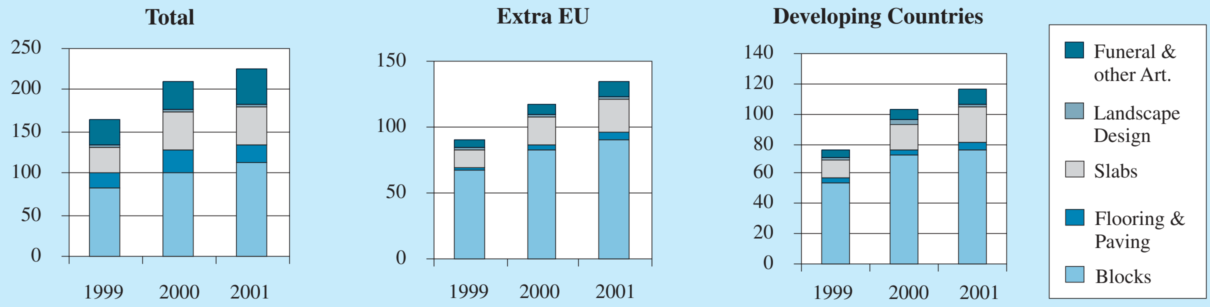
Source: Eurostat (2002)

the observed trend in the overall price level of imports of natural stone and natural stone products and the slowdown in the German economy.
The total volume of natural stone and natural stone products imported decreased for all product-groups, except for the volume of imported blocks, which increased during the 1999-2001 period by 56 percent. In terms of volume and value, it seems that imports of siliceous products exceed the imports of calcareous products for all product groups.

Spain

In 2001, Spanish imports of natural stone and natural stone products amounted to € 227 million, representing a total volume of 956 thousand tonnes. Compared to 1999, this was an increase of 39 percent in value and a 30 increase in volume. Imports from developing countries increased by 54 percent in value and by 41 percent in volume to respectively € 117 million and 478 thousand tonnes. The share of developing countries in the Spanish imports between 1999 and 2001 also increased by 5.0 percent to 51.6 percent.

Figure 5.5 Overview of Spanish imports. The figures represented Spanish imports from the EU, imports outside the EU, and imports from developing countries in million €, 1999-2001



Source: Eurostat (2002)

Table 5.4 Overview of statistics on Spanish imports of natural stone and natural stone products

	Blocks	Flooring & cladding	Slabs	Funeral & other art	Landscape design
Share of total value imports of natural stone & natural stone products	50%	10%	20%	19%	1%
Value (million €)	113	22	45	44	3
Volume ('000 tonnes)	627	47	187	85	10
Growth value (' 99 - ' 01)	38%	15%	45%	46%	131%
Growth volume (' 99 - ' 01)	38%	-14%	42%	0%	42%
Share siliceous natural stone	45%	1%	8%	4%	-
Value siliceous (million €)	102	3	18	8	-
Volume siliceous ('000)	571	6	81	21	-
Growth value siliceous (' 99 - ' 01)	33%	84%	73%	5%	-
Growth volume siliceous (' 99 - ' 01)	34%	11%	62%	-13%	-
Share calcareous natural stone	5%	8%	12%	16%	-
Value calcareous (million €)	10	19	27	36	-
Volume calcareous ('000)	56	41	106	64	-
Growth value calcareous (' 99 - ' 01)	104%	8%	31%	61%	-
Growth volume calcareous (' 99 - ' 01)	88%	-17%	30%	5%	-

Source: Eurostat (2002)

Imports of blocks account for the largest share (50 percent) of total Spanish imports, which is explained by the presence of a large stone processing industry that processes raw blocks into slabs or finished product.
Table 5.4 presents an overview of Spanish imports of natural stone and natural stone products by product group. Table 5.4 shows positive growth in all product groups. Spanish imports of landscape design recorded the highest growth between 1999 and 2001 (131 percent) followed by funeral and other art (46 percent), slabs (45 percent), blocks (38 percent) and tiles for flooring & cladding (15 percent).

In Spain's imports of raw blocks it should be noted that the imports of siliceous stone represents the bulk of total Spanish imports of raw blocks. For tiles for flooring & cladding, slabs and funeral & other art, calcareous stones represent the bulk of total imports of these product groups.

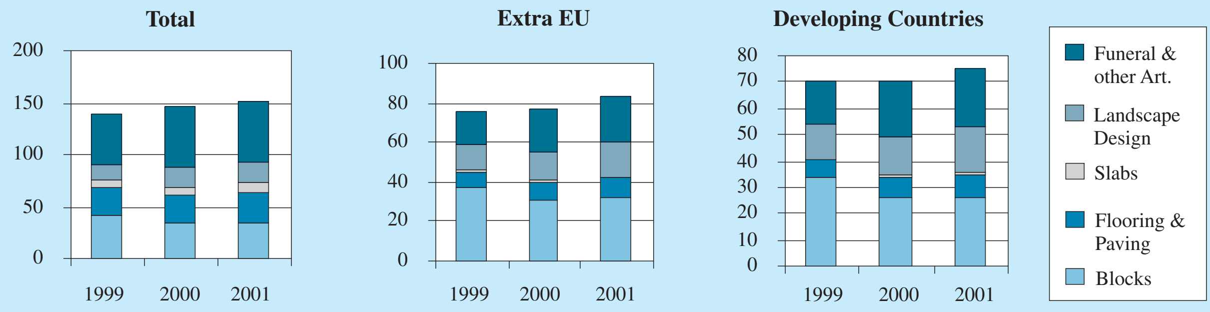
Belgium

In 2001, Belgian imports of natural stone amounted to € 152 million representing a total volume of 545 thousand tonnes. Compared to 1999, this was an increase of 9 percent in value and a 9 percent decrease in volume. Imports from developing countries increased by 7 percent in value and increased by 2 percent in volume to € 75 million and 302 thousand tonnes respectively. The share of developing countries in total Belgian imports between 1999 and 2001 decreased by 1 percent to 49.4 percent. Imports of funeral and other art make up the largest share (38 percent) of total Belgian imports.

Table 5.5 presents an overview of Belgian imports of natural stone and natural stone products by product group. Table 5.5 shows positive growth (in value) for imports of natural stone products for landscape design (32 percent), slabs (30 percent), funeral and other art (21 percent) and flooring and cladding (12 percent) and negative growth for blocks (minus 17 percent).

For Belgian imports of raw blocks and funeral and other art it should be noted that imports of siliceous stone represents the bulk of total imports of raw blocks. For tiles for flooring & cladding, calcareous stones represent the bulk of total imports of these product groups.

Figure 5.6 Overview of Belgian imports. The figures represented Belgian imports from the EU, imports outside the EU, and imports from developing countries in million €, 1999-2001



Source: Eurostat (2002)

Table 5.5 Overview of statistics on Belgian imports of natural stone and natural stone products

	Blocks	Flooring & cladding	Slabs	Funeral & other art	Landscape design
Share of total value imports of natural stone & natural stone products	22%	20%	6%	38%	14%
Value (million €)	34	30	9	58	21
Volume ('000 tonnes)	149	103	35	111	148
Growth value (' 99 - ' 01)	-17%	12%	30%	21%	32%
Growth volume (' 99 - ' 01)	-25%	-4%	-56%	14%	27%
Share siliceous natural stone	22%	6%	2%	23%	-
Value siliceous (million €)	34	9	4	34	-
Volume siliceous ('000)	147	31	18	67	-
Growth value siliceous (' 99 - ' 01)	-17%	-3%	32%	52%	-
Growth volume siliceous (' 99 - ' 01)	-24%	-37%	-75%	59%	-
Share calcareous natural stone	0%	13%	3%	16%	-
Value calcareous (million €)	0	20	5	24	-
Volume calcareous ('000)	1	72	17	44	-
Growth value calcareous (' 99 - ' 01)	-55%	21%	28%	-7%	-
Growth volume calcareous (' 99 - ' 01)	-52%	26%	133%	-21%	-

Source: Eurostat (2002)

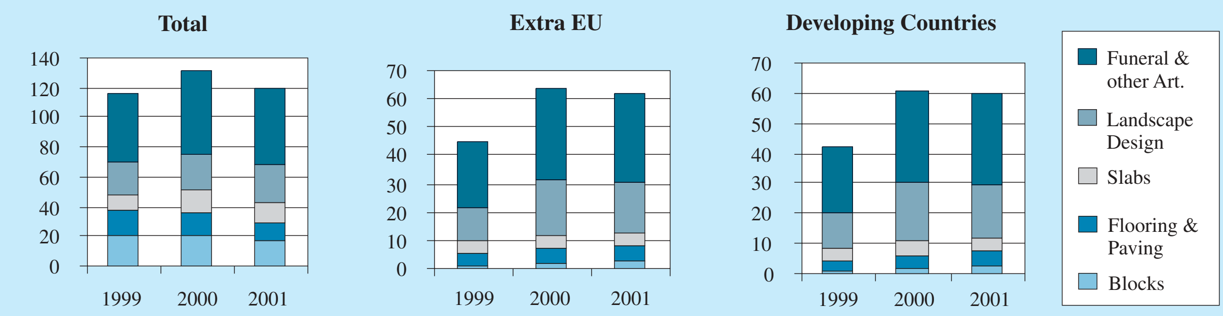
The Netherlands

In 2001, Dutch imports of natural stone and natural stone products amounted to € 120 million representing a total volume of 1,045 thousand tonnes. Compared to 1999, this was an increase of 3 percent in value and a 29 percent decrease in volume. Imports from developing countries increased by 41 percent in value and by 37 percent in volume to respectively € 60 million and 276 thousand tonnes. The share of developing countries in the Dutch imports between 1999 and 2001 also increased by 13 percent to 49.9 percent.

Imports of funeral and other art make up the largest share (42 percent) of total Dutch imports.

Table 5.6 presents an overview of Dutch imports of natural stone and natural stone products by product group. Table 5.6 shows negative growth (in value) for imports of blocks (minus 46 percent), tiles for flooring & cladding (minus 17 percent) and positive growth for natural stone products for landscape design (23 percent), slabs (11 percent) and funeral and other art (9 percent). Except for imports of blocks and slabs, all product groups exhibit increases in the quantity

Figure 5.7 **Overview of Dutch imports. The figures represented Dutch imports from the EU, imports outside the EU, and imports from developing countries in million €, 1999-2001**



Source: Eurostat (2002)

Table 5.6 **Overview of statistics on Dutch imports of natural stone and natural stone products**

	Blocks	Flooring & cladding	Slabs	Funeral & other art	Landscape design
Share of total value imports of natural stone & natural stone products	14%	11%	11%	42%	22%
Value (million €)	16	13	13	51	26
Volume ('000 tonnes)	568	35	33	87	322
Growth value (' 99 - ' 01)	-21%	-17%	11%	9%	23%
Growth volume (' 99 - ' 01)	-46%	14%	-15%	7%	21%
Share siliceous natural stone	13%	5%	7%	32%	-
Value siliceous (million €)	16	6	8	38	-
Volume siliceous ('000)	567	22	26	67	-
Growth value siliceous (' 99 - ' 01)	-20%	-9%	29%	10%	-
Growth volume siliceous (' 99 - ' 01)	-46%	59%	-17%	8%	-
Share calcareous natural stone	0%	6%	4%	11%	-
Value calcareous (million €)	0	7	5	13	-
Volume calcareous ('000)	2	13	7	19	-
Growth value calcareous (' 99 - ' 01)	-71%	-24%	-9%	8%	-
Growth volume calcareous (' 99 - ' 01)	-62%	-22%	-7%	2%	-

Source: Eurostat (2002)

imported during the 1999-2001 period. Except for tiles for flooring & cladding, the bulk of total imports are made of siliceous stone types.

5.2 Imports by product group

Blocks of natural stone constituted the largest share (35 percent) of EU imports of natural stone and natural stone products followed by funeral and other art (34 percent), natural stone and natural stone products for landscape design (11 percent), tiles for flooring and cladding (11 percent) and slabs (9 percent). Figure 5.9 presents an overview of the share of the seven largest EU importers of natural stone and natural stone products per product group.

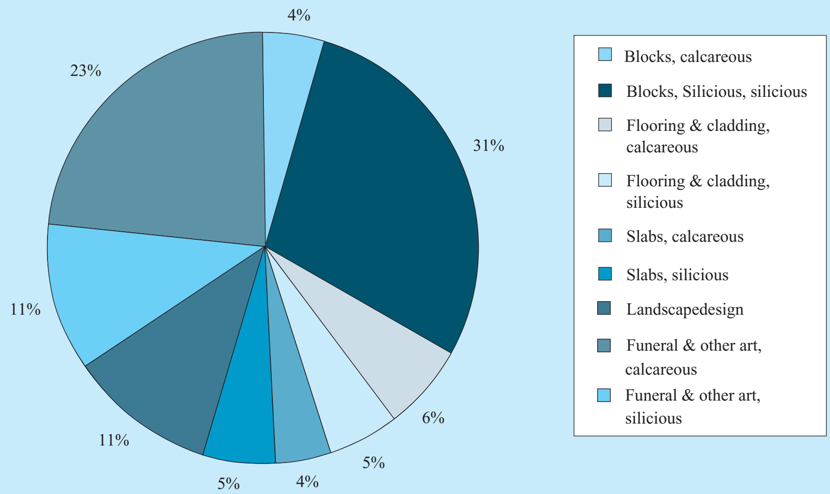
Figure 5.9 shows that these seven countries account for:

- 94 percent of total EU imports of blocks;
- Almost 80 percent of total EU imports of tiles for flooring and cladding;
- Over 85 percent of total EU imports of slabs;
- Around 80 percent of total EU imports of natural stone products for landscape design; and
- Close to 83 percent of total EU imports of funerary and other art.

EU Imports of blocks

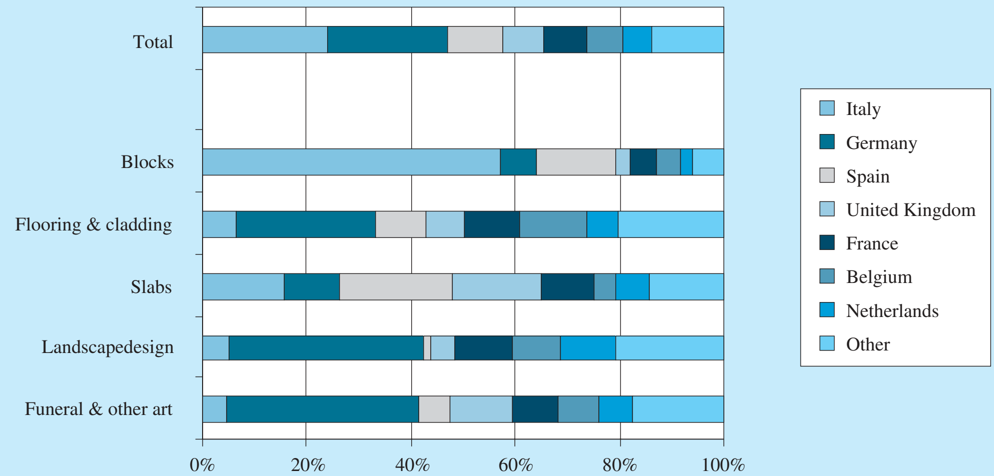
In 2001, the EU imported € 755 million worth of natural stone blocks, which accounted for 34 percent of EU imports of natural stone and natural stone products.

Figure 5.8 Shares of product groups in EU imports of natural stone and natural stone products, 2001



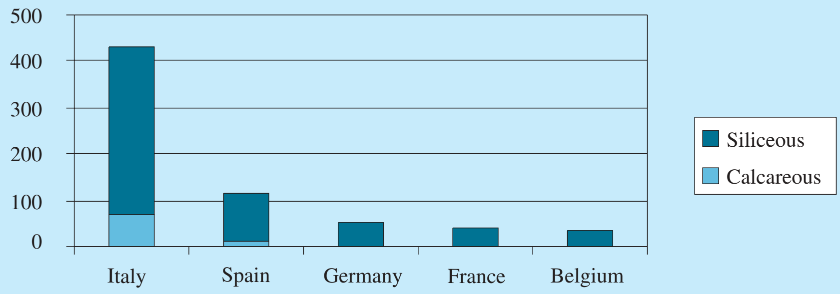
Source: Eurostat (2002)

Figure 5.9 Share of EU countries in total value of EU natural stone and natural stone products imports by group, 2001



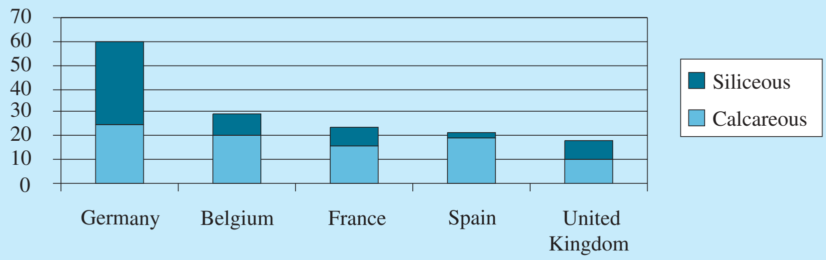
Source: Eurostat (2002)

Figure 5.10 Leading importers of raw blocks in the EU, in million €, 2001



Source: Eurostat (2002)

Figure 5.11 Leading importers of natural stone tile in the EU, in million €, 2001



Source: Eurostat (2002)

Since 1999, imports of natural stone blocks have increased by 14 percent in value and have decreased by 2 percent in volume. This average masks greater variation by region of origin, however. The value of blocks from developing countries rose by 17 percent while the volume rose by 7 percent.

In 2001, Italy imported 57 percent of total EU imports of natural stone blocks, equalling € 433 million, followed by Spain (15 percent), Germany (7 percent), France (5 percent), Belgium (5 percent), the United Kingdom (3 percent) and the Netherlands (2 percent).

Siliceous blocks make up the largest part (87 percent) of EU imports of natural stone blocks, amounting to € 658 million in 2001. EU imports of calcareous blocks amounted to € 97 million in 2001.

The largest suppliers of EU imports of natural stone blocks were Brazil (20 percent), followed by India (19 percent), South Africa (13 percent), Norway (11 percent) and Spain (4 percent).

EU Imports of tiles for flooring and cladding

In 2001, the EU imported € 228 million of natural stone tiles, which was 10 percent of EU imports of natural stone and natural stone products. Since 1999, imports of natural stone tiles have increased by 9 percent in value and have decreased by 2 percent in volume. The value of natural stone tiles from developing countries rose by 47 percent while the volume rose by 31 percent.

In 2001, Germany imported 26 percent of total EU imports of natural stone tiles, equalling € 60 million, followed by Belgium (13 percent), France (10 percent), Spain (10 percent), the United Kingdom (8 percent), Italy (7 percent) and the Netherlands (6 percent).

EU imports of calcareous tiles make up the largest part (56 percent) of EU imports of natural stone tiles, amounting to € 127 million in 2001. EU imports of siliceous tiles amounted to € 101 million in 2001.

The largest suppliers of EU imports of natural stone tiles were Italy (34 percent), followed by Spain (11 percent), China (7 percent), India (5 percent) and Turkey (5 percent).

EU imports of slabs of natural stone

In 2001, the EU imported € 209 million worth of natural stone slabs, which was 10 percent of EU imports of natural stone and natural stone products. Since 1999, imports of natural stone slabs have increased by 26 percent in value and by 108 percent in volume.

In 2001, Spain imported 22 percent of total EU imports of natural stone slabs, equalling € 45 million, followed by the United Kingdom (17 percent), Italy (16 percent), Germany (10 percent), France (10 percent), the Netherlands (6 percent) and Belgium (4 percent). EU imports of siliceous slabs make up the largest part of EU imports of natural stone slabs amounting to € 119 million in 2001. EU imports of calcareous slabs amounted to € 90 million in 2001.
The largest suppliers of EU imports of natural stone slabs were Italy (28 percent), followed by, Spain (9 percent), Turkey (7 percent), Portugal (6 percent) and Norway (6 percent).

EU imports of natural stone and natural stone products for landscape design
In 2001, the EU imported € 240 million of natural stone and natural stone products for landscape design (such as setts and kerbstones), which was 11 percent of EU imports of natural stone and natural stone products. Since 1999, imports of natural stone and natural stone products for landscape design have increased by 22 percent in value and 12 percent in volume. The share of developing countries in this product group amounted to 47 percent of the value of total EU imports and 39 percent of total volume.

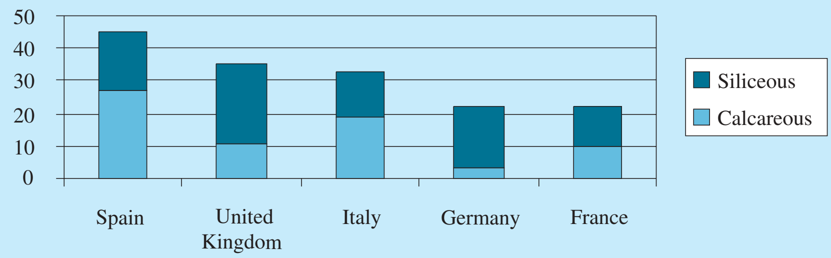
In 2001, Germany imported 38 percent of total EU imports of natural stone and natural stone products for landscape design, equalling € 90 million, followed by France (11 percent), the Netherlands (11 percent), Belgium (9 percent), Denmark (8 percent), Italy (5 percent) and Austria (5 percent).

The largest suppliers of EU imports of natural stone and natural stone products for landscape design were China (28 percent), followed by Portugal (10 percent), India (9 percent), Germany (7 percent) and Belgium (7 percent).

EU imports of funeral and other art
In 2001, the EU imported € 756 million of funeral and other art, which was 35 percent of EU imports of natural stone and natural stone products.
Since 1999, imports of funeral and other art have increased by 7 percent in value and by 6 percent in volume.

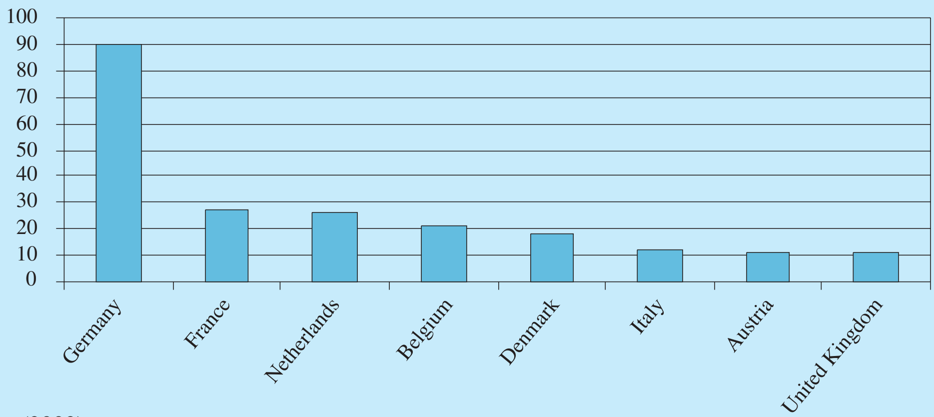
In 2001, Germany imported 37 percent of total EU imports of funeral and other art, equalling € 281 million, followed by the United Kingdom (12 percent), France (9 percent), Austria (8 percent), Belgium (8 percent) and the Netherlands (7 percent).

Figure 5.12 Leading importers of natural stone slabs in the EU, in million €, 2001



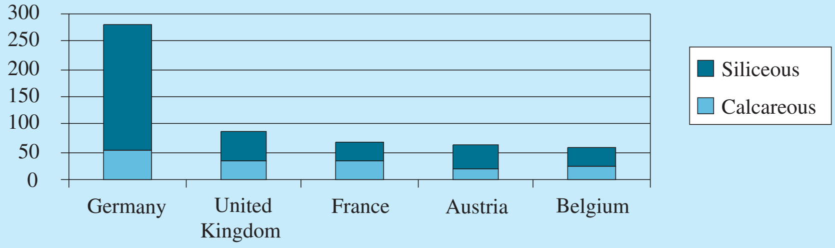
Source: Eurostat (2002)

Figure 5.13 Leading importers of natural stone and natural stone products for landscape design in the EU, in million €, 2001



Source: Eurostat (2002)

Figure 5.14 Leading importers of funeral and other art in the EU, in million €, 2001



Source: Eurostat (2002)

EU imports of funeral and other art made of siliceous stone make up the largest part of EU imports (67 percent) of funeral and other art, amounting to € 506 million in 2001. EU imports of funeral and other art made of calcareous stone amounted to € 250 million in 2001.

The largest suppliers of EU imports of natural funeral and other art were Italy (40 percent), followed by India (11 percent), China (11 percent), Spain (9 percent), Belgium (4 percent) and Portugal (4 percent).

5.3 The role of developing countries

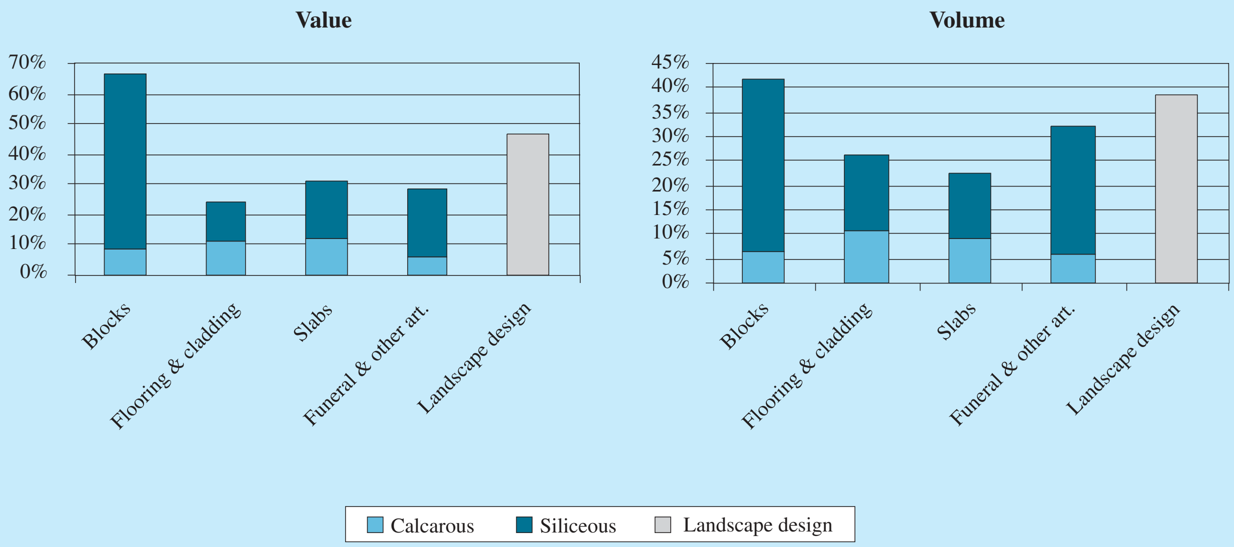
In 2001, EU imports of natural stone and natural stone products from developing countries amounted to € 949 million with a volume of 3,865 thousand tonnes. In 2001, the value of imports from developing countries represented 32 percent of total EU imports of natural stone and natural stone products, in volume their share amounted to 19 percent.

Blocks represented 53 percent of the total value of imports stemming from developing countries, followed by funeral and other art (23 percent), natural stone and natural stone products for landscape design (12 percent), slabs (7 percent) and tiles for flooring and cladding (6 percent).

Figure 5.15 presents an overview of the share of EU imports from developing countries in total EU imports from countries outside the EU, both in value and volume.

Developing countries' contribution is largest in the EU imports of blocks (66 percent in value, 42 percent in volume) followed by landscape design (47 percent in value, 39 percent in volume), slabs (31 percent in value, 22 percent in volume), funeral and other art (29 percent in value, 32 percent in volume) and tiles for flooring and cladding (25 percent in value and 26 percent in volume).

Figure 5.15 Share developing countries in total extra EU imports per product group, 2001



Source: Eurostat (2002)

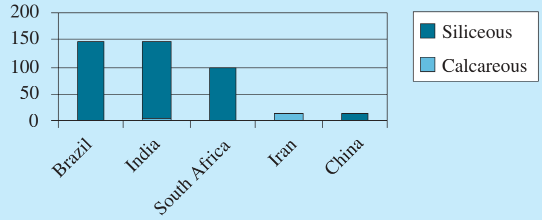
EU imports from developing countries have increased in all product groups of natural stone and natural stone products. In the period 1999-2001, imports of:

- Blocks increased by 17 percent in value and 7 percent in volume;
- Tiles for flooring and cladding increased by 47 percent in value and 31 percent in volume;
- Imports of slabs increased by 71 percent in value and 74 percent in volume;
- Natural stone and natural stone products for landscaper design increased by 53 percent in value and 28 percent in volume;
- Funeral and other art increased by 49 percent in value and 59 percent in volume.

In 2001, almost one third (29 percent) of EU imports of natural stone and natural stone products from developing countries originated from India.
In 2001, India exported 1,038 thousand tonnes of natural stone and natural stone products with a total value of € 275 million. Since 1999, India registered growth in its exports by 19 percent in value and by 11 percent in volume. China is the second largest exporter of natural stone and natural stone products to the EU, accounting for 21 percent of EU imports from developing countries. Brazil accounts for 18 percent of EU imports from developing countries followed by South Africa (10.7 percent), Turkey (6.9 percent), Iran (1.9 percent), Saudi Arabia (1.4 percent), Egypt (1.2 percent), Mozambique (1.0 percent), Vietnam (1.0 percent), Croatia (0.9 percent), Morocco (0.7 percent) and Zimbabwe (0.7 percent).

Among developing countries, the most important suppliers of blocks are Brazil (€ 148 million), India (€ 146 million), South Africa (€ 97 million), Turkey (€ 14 million), and China (€ 14 million).
In 2001 these were the only developing countries exporting over € 14 million worth of natural stone blocks to the EU.

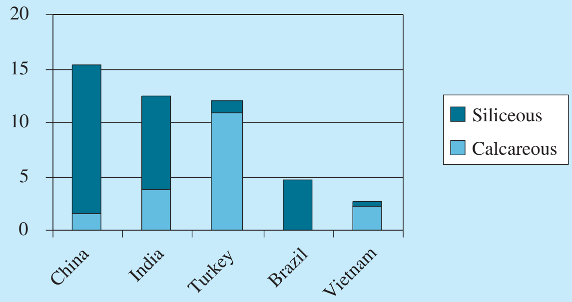
Figure 5.16 Leading suppliers of raw blocks from developing countries to the EU, in million €, 2001



Source: Eurostat (2002)

Among developing countries, the most important suppliers of naturals stone tiles are China (€ 15 million), India (€ 12 million), Turkey (€ 12 million), Brazil € 4.6 million) and Vietnam (€ 2.7 million).
In 2001, these were the only developing countries exporting over € 2.5 million worth of natural stone tiles to the EU.

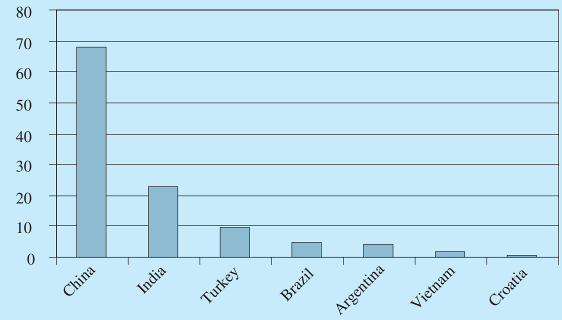
Figure 5.17 Leading suppliers of natural stone tiles from developing countries to the EU, in million €, 2001



Source: Eurostat (2002)

Among developing countries, the most important suppliers of natural stone products for landscape design are China (€ 68 million, India (€ 23 million), Turkey (€ 10 million), Brazil (€ 4.6 million), Argentina (€ 4.4 million) and Vietnam (€ 1.7 million).
In 2001, these were the only developing countries exporting over € 1.0 million worth of natural stone and natural stone products for landscape design to the EU.

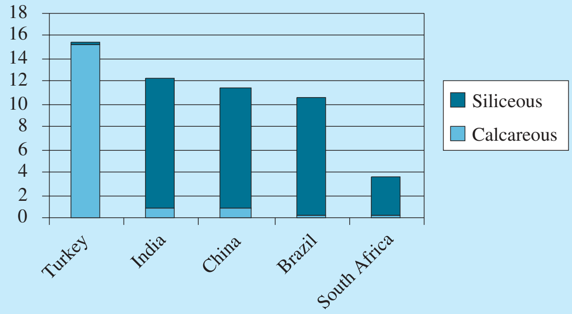
Figure 5.18 Leading suppliers of natural stone products for landscape design from developing countries to the EU, in million €, 2001



Source: Eurostat (2002)

Among developing countries, the most important suppliers of natural stone slabs are Turkey (€ 15 million), India (€ 12 million), China (€ 12 million), Brazil (€ 11 million), South Africa (€ 3.6 million) and Egypt (€ 1.3 million). In 2001, these were the only developing countries exporting over € 1.0 million worth of natural stone slabs to the EU.

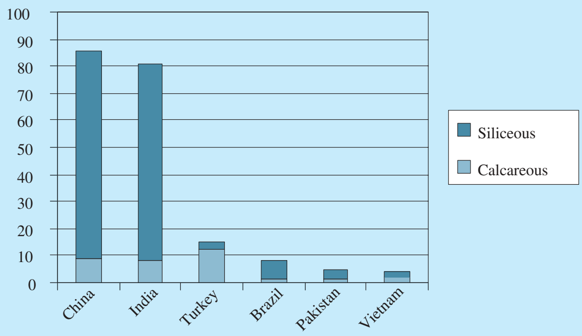
Figure 5.19 Leading suppliers of natural stone slabs from developing countries to the EU, in million €, 2001



Source: Eurostat (2002)

Among developing countries, the most important suppliers of funeral and other art are China (€ 86 million), India (€ 81 million), Turkey (€ 15 million), Brazil (€ 8 million), Pakistan (€ 4.4 million) and Vietnam (€ 4.3 million). In 2001, these were the only developing countries exporting over € 4.0 million worth of funeral and other art to the EU.

Figure 5.20 Leading suppliers of funeral and other art from developing countries to the EU, in million €, 2001



Source: Eurostat (2002)

6 EXPORTS

With respect to interpreting the data on exports of natural stone and natural stone products the same precautions are needed as for the imports, mentioned in chapter 5. Please refer to appendix 1 for more detailed export figures.

In 2001, the EU Member States exported 8,010 thousand tonnes of natural stone and natural stone products representing a total value of € 3,367 million.

Between 1999 and 2001, the value of total EU exports decreased by 13 percent, while volume increased by 4 percent. The main EU exporter of natural stone and natural stone products is Italy followed by Spain, Portugal, France, Belgium and Greece.

In 2001, 23 percent of the total value of EU exports of natural stone and natural stone products consisted of funeral and other art (55 percent), followed by tiles for flooring and paving (23 percent), slabs (11 percent), blocks (7 percent) and natural stone products for landscape design (4 percent).

Italy

In 2001, Italy sold 3,371 thousand tonnes of natural stone and natural stone products to other countries with a value amounting to € 1,971 million, thereby being the largest exporter in the EU. Since 1999 its exports increased by 9 percent in value and 1 percent in volume. The share of Italy's exports to countries outside the EU increased by 6 percent between 1999 and 2001. In 2001, Italy's most important exports of natural stone and natural stone products were funeral and other art (59 percent), followed by tiles for flooring and cladding (28 percent), slabs (7 percent), blocks (4 percent) and products for landscape design (2 percent).

Germany

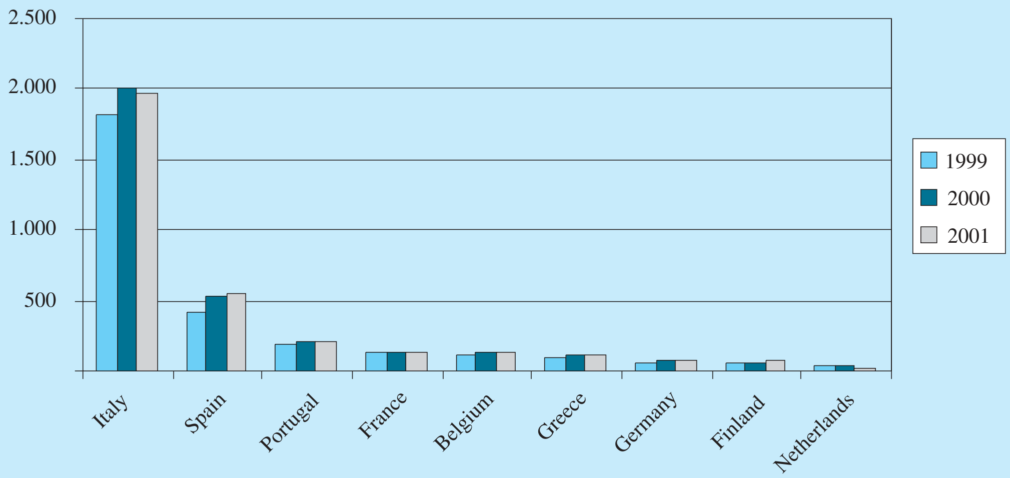
In 2001, Germany sold 297 thousand tonnes of natural stone and natural stone products to other countries with a value amounting to € 71 million, thereby being the eighth largest exporter in the EU.
Since 1999 its exports increased by 13 percent in value but increased by 6 percent in volume. The share of Germany's exports to countries outside the EU increased by 14 percent between 1999 and 2001.
In 2001, Germany's most important exports of natural stone and natural stone products were funeral and other art (66 percent), followed by tiles for flooring and cladding (14 percent), products for landscape design (11 percent), blocks (6 percent) and slabs (3 percent).

Spain

In 2001, Spain sold 1,245 thousand tonnes of natural stone and natural stone products to other countries with a value amounting to € 548 million, thereby being the second largest exporter in the EU.
Since 1999 its exports increased by 29 percent in value and by 14 percent in volume. The share of Spanish exports to countries outside the EU increased by 1.2 percent between 1999 and 2001.

In 2001, Spain's most important exports of natural stone and natural stone products were funeral and other art (47 percent) followed by slabs (34 percent), tiles for flooring and cladding (11 percent), blocks (8 percent) and products for landscape design (1 percent).

Fig. 6.1 EU exports of natural stone by country in million €, 1999 – 2001



Souce: Eurostat (2002)

Belgium

In 2001 Belgium sold 509 thousand tonnes of natural stone and natural stone products to other countries with a value amounting to € 124 million, thereby being the fifth largest exporter in the EU. Since 1999 Belgian exports increased by 8 percent in value and increased by 7 percent in volume. The share of Belgian exports to countries outside the EU decreased by 1.4 percent between 1999 and 2001. In 2001, Belgian most important exports of natural stone and natural stone products were funeral and other art (52 percent) followed by products for landscape design (19 percent), tiles for flooring and cladding (15 percent), slabs (9 percent), and blocks (5 percent).

The Netherlands

In 2001, the Netherlands sold 172 thousand tonnes of natural stone and natural stone products to other countries with a value amounting to € 28 million, thereby being the ninth largest exporter in the EU. Since 1999, its exports decreased by 6 percent in value and by 7 percent in volume. The share of Dutch exports to countries outside the EU increased with 3.2 percent during the 1999 – 2001 period. In 2001, most important exports of the Netherlands of natural stone and natural stone products were products for landscape design (51 percent) followed by funeral and other art (33 percent), tiles for flooring and cladding (10 percent), slabs (5 percent), and blocks (1 percent).

Destination of EU exports

Most of EU's exports (23 percent) went to the USA. Other large receivers of EU exports of natural stone and natural stone products are Germany (15 percent), France (4 percent) and the Netherlands (4 percent). Besides the USA, other important destinations outside the EU are Saudi-Arabia (4 percent), Switzerland (4 percent), China (3 percent), Japan (2 percent) and Hong Kong (2 percent).

7 TRADE STRUCTURE

7.1 EU trade channels

As natural stone has a limited number of exporters and importers, the trade channels are fairly straightforward. Figure 7.1 presents an overview of the product flows from producer to consumer for the different kind of product groups set out in chapter 1.

The route from the producer of natural stones to the ultimate consumer varies with the sort of product. Basically the trade structure consists of two segments: importers of semi-finished products (blocks and slabs) for further self-processing and importers of finished products.

Importers of semi-finished products are either medium or large companies in the stone processing industry or wholesalers. The processing industry consists of companies producing finished goods such as tiles, tombstones and custom-made kitchen countertops. Large firms in the processing industry are likely to purchase blocks or slabs of natural stone themselves while small firms are more likely to purchase blocks or slabs of natural stone from wholesalers.

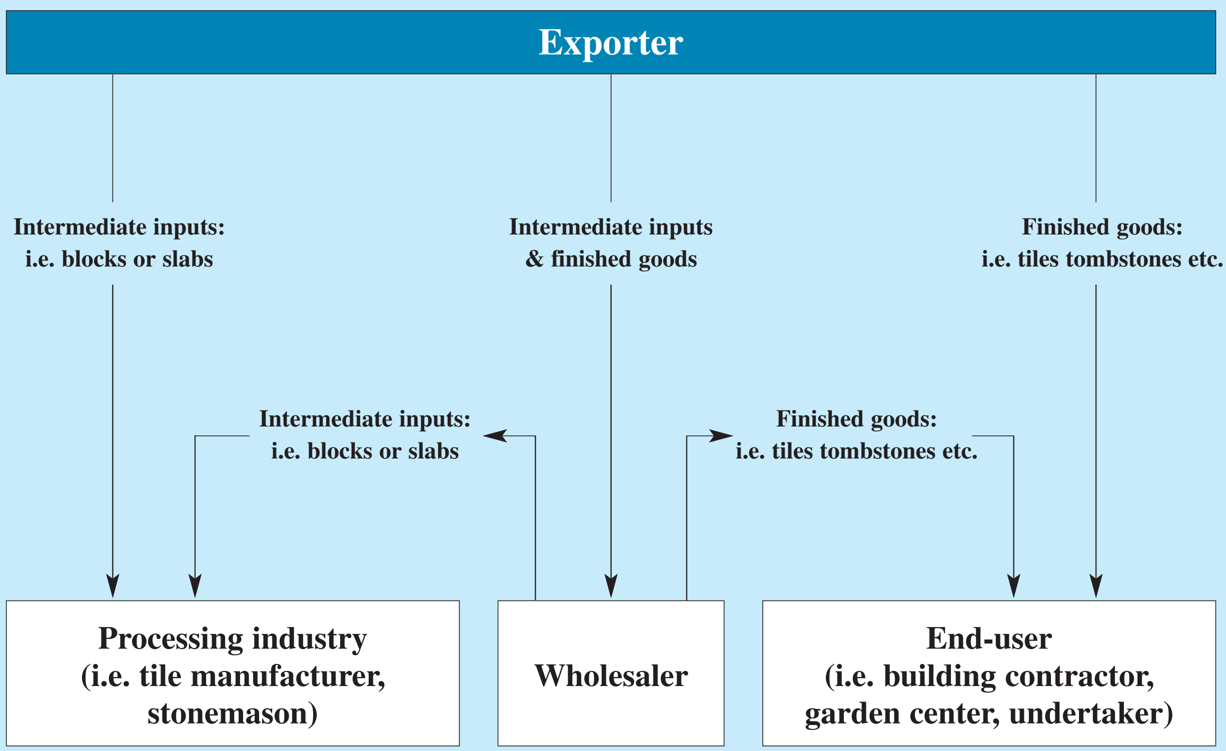
Large importing firms occasionally bring a visit to a quarry, if the natural stone is considered to be of a good and saleable quality. When the quarry enables the importing firm to make a profit, they will initially exploit the quarry themselves. After 10 up to 15 years, the entire exploitation can be done locally.

Blocks are mostly imported by Italian and Spanish companies, where, due to a long history of natural stone exploitation, companies also posses sawing machines. Appendix 10 specifies which of the European importers also import blocks of natural stone.

Importers of finished products are either wholesalers or end-users like building contractors, garden centres or undertakers. Large importers that require finished natural stone products are more likely to purchase the natural stone products abroad, while smaller firms are likely to purchase the required finished natural stone products via wholesalers.

There is a distinct difference between Southern Europe and Northern Europe. In Southern Europe, every village has approximately two stonemasons, as this craft is more traditional. In Northern Europe, the trade channel is much more channelled and standardised.

Figure 7.1 General trade structure within EU countries



Currently, three trends can be observed within Europe:

- Larger building contractors or distributive traders are starting to buy directly from foreign natural stone exporters thereby surpassing the importer / wholesaler. By realising a shorter trade chain, profits can be increased.
- Through internet, over 1,700 types of natural stone can be assessed by prospective buyers, including prices and direct orders can be placed. Although buying through the internet is not optimal yet, e.g. there is a risk of getting low quality products, the internet provides the opportunity to buy directly from the exporter.
- Contrary to the two trends described above, a trend can be observed of increased attention to high quality service offered by the European wholesaler. The demand for an extensive range of stones creates a dominant role for the wholesaler/importer who should posses the ability to adjust exactly to the wishes of the end customer including just-in-time-delivery.

Antolini Luigi & C is a large wholesaler / producer in Italy. This firm has its own quarries but also buys raw blocks around the world and processes these blocks into slabs, or finished goods such as tiles for flooring or cladding, kitchen counter tops, stairs etc which are sold world-wide. The company buys all sorts of raw blocks (siliceous and calcareous) from almost all natural stone producing countries but does not buy finished goods. More information Antolini Luigi & can be found at their website www.antolini.it.

The R.E.D. group consists of eight producing companies in the principal producer countries, several agencies and five sales companies with offices and stockyards in Italy, Spain, France, Belgium and Germany.
The R.E.D. group invests in quarry operations in developing countries and buys raw blocks from natural stone producing countries. More information on the R.E.D. group can be found at the website: *www.marbleintheworld.com/homepag/red/.*

In the Netherlands, the largest importer is Natuursteen Holland B.V. Products purchased by Natuursteen Holland B.V. from developing countries are granite, marble, slate and quartzite intermediate inputs (i.e. blocks and slabs) and finished goods (tiles for flooring and cladding, some garden decorations).

The main developing countries with which the company keeps close trading relations are India, Brazil and South Africa. As for all European importers, the price/quality ratio of the product (including packing) stands out as the most important factor influencing their purchase decision.

7.2 Distribution channels for developing country exporters

The source of all natural stone is the stone quarry. The exporter in the developing country can either be the quarry owner, a processor or a trader.
Figure 7.1 provides an overview of the general trade structure that the exporter will encounter in the EU.

Italy and Spain are the most important countries to import blocks. Appendix 10, which gives a list of the most important importers in the EU, indicates whether they import blocks, or not.

For both intermediate inputs and finished goods of natural stone, the most appropriate distribution channel for exporters from developing countries is the wholesale channel. In both segments (intermediate inputs and finished goods) the wholesale channel accounts for the largest turnover.

The other distribution channels, e.g. the processing industry and the end-user, mainly work through wholesalers. Within the European market, there are fairly limited possibilities for selling building materials (mainly tiles) to the DIY market, as its usage requires professional handling. Previous experiments with the DIY market proved to be unsuccessful. The only products that are sold via the DIY markets and garden centres are setts, flagstones, and garden art.

A trade fair is a good way to get in contact with companies from all over the world that could be interested in new suppliers. Please refer to the EU Strategic Market Guide for more information on trade fairs and to Appendix 5 of this survey for contact details of trade fair organisers.

Exporters should realise that the Internet is becoming an important medium in trade of natural stones. Interesting links in this respect are *www.findstone.com* and *www.marbleandmore.com.*

8 PRICES AND MARGINS

8.1 Prices and margins

In general, it can be stated that the average unit price level of natural stone and natural stone products is falling due to an expanding supply fuelled by technical progress.

Wide price fluctuations exist, with variations depending on product quality and changing preferences for different stone types and sizes. Within the EU, raw block prices are subject to tougher competition than slabs and finished goods due to the inflow of cheaper material from low cost producing countries such as China, India and Turkey, which has served to keep prices down. Regardless of price competition, there are some types and colours of stone, which will always be highly priced, due to their limited availability (e.g. green marble, blue marble). Black granites are also particularly highly-priced because of limited availability and higher production costs. Next to issues like production costs and consumer demand, the analysis of average prices is influenced by variations in exchange rates.

Some exclusive types of marble are very brittle, thereby requiring special treatment. These types of marble can be treated with an extra plastic layer (see figure 8.1) in order to have slabs, which can be further processed. This treatment can almost exclusively be done in Italy. Needless to say, these slabs are destined for the top-end of the market.

Figure 8.1 Marble with a plastic layer

In addition to the quality of the (semi-)finished product, prices depend on the distribution channel used.

The amount of agents within the trade channel is especially relevant, as every agent will charge a certain amount of commission.

In general, the price for the end-user or consumer consists of the following components.

Production cost price, including transport to port (i.e. FOB) [5]

- \+ Transportation and insurance costs (i.e. CIF)
- \+ Other costs (Storage, banking, marketing)
- \+ Import duties

Landed Cost price

- \+ Margin importer, Wholesaler, Margin Stone Mason, Retailer
- \+ Value Added Tax (VAT)

Consumer price

Margins

The margins for the different intermediaries in the trade stucture (wholesaler, stonemason) are difficult to determine because they are influenced by many factors such as:

- Size of the order (the larger the order, the less margin)
- Exclusivity of the product (exclusive products allow high margins)
- Added value (a custom made kitchen countertop will have a higher margin than a standard tile)

The value that is added within the trade channel arises from the logistics and services provided in the channel. These function ranges from distribution and repackaging to sawing, and processing activities of stonemasons.

The box below gives an assessment of the ranges of mark-ups per intermediary.

Intermediary	Margin
Wholesaler	35 %
Stonemason	20 %

Table 8.1 presents prices for marble and granite products of standard sizes. These prices are Dutch market prices, and include delivery when the order is sufficiently large (more than 1,000 kg).

[5] *Please refer to the EU Strategic Guide "Natural Stone" section 2.1.2 "payment and delivery methods" for a description of "FOB" and "CIF".*

Table 8.1 Dutch market prices for natural stone and natural stone products, €

		Price*	Marble "Ajax"	Granite "Impala"
Strips	30cm x free length	€ / m2	44	53
	40cm x 40cm	€ / m2	46	-
Tiles	30.5cm x 20cm	€ / m2	41	-
	30.5cm x 30.5cm	€ / m2	41	53
Slabs	Thickness 2cm	€ / m2	85	56
	Thickness 3cm	€ / m2	125	75

** Excluding VAT*

Note that prices of different natural stone show significant differences. In case of large quantities, or frequent customers, discounts between 5-15 percent are normal within this branch.

8.2 Sources of price information

To get up-to-date price information one has to turn to the actual importers of natural stone and natural stone products, please refer to appendix 10 for addresses of EU importers. Another possibility, which is becoming increasingly important, is through the World Wide Web.

Web sites providing price information are:
http://www.marbleandmore.com,
http://www.findstone.com,
http://rvkfloors.com/marble.htm,
http://www.stone-network.com/, and
http://www.stonesource.com/.

On these sites you can, among other things, find prices of (semi-)finished natural stone products, machinery (new and second-hand) and chemicals.

9 OPPORTUNITIES FOR EXPORTERS

A number of developing countries possess significant natural stone resources. Nevertheless, there are many limitations for efficient and sustainable utilisation of the supplies of natural stone. Most of the constraints are associated with domestic political and economic problems, poor infrastructure, inaccessibility of the resources, and the overall weak capability of the nations to generate investments and new processing capacities. Please refer also to the EU Strategic Marketing Guidelines for information on requirements for access to the EU market (including product quality, packaging, labelling and environmental standards), information on relevant trade fairs and magazines as well as a checklist for exporters.

EU imports from developing countries have increased in all product groups of natural stone and natural stone products as discussed in this Market Survey.

Moreover, EU imports from developing countries have increased at a faster rate than total EU imports.
Below, an overview is provided of product groups and particular products that have a potential for exporters in developing countries on the EU market for natural stone and natural stone products.

Raw blocks
The exports of raw blocks can be considered as the initial phase to start exports to the EU market.
Raw blocks account for 35 percent of all EU imports of natural stone and natural stone products, and form the largest product group (in value). It is expected that there will be an increasing demand for raw blocks of both granite and marble as the use of finished goods of natural stone is still increasing within the EU. Especially Italy and Spain are important markets for raw blocks. These countries posses up to date machinery and tools to process the blocks to slabs or finished goods.

Tiles, flagstones, setts & curbstones
The exports of these products can be considered as a second phase in exporting to the EU market.
In comparison with the production of slabs, these products require smaller and less capital-intensive equipment. The dimensions of the products are well known throughout the trade.

Tiles for flooring and cladding account for 11 percent of the total value of EU imports of natural stone and natural stone products. It is expected that there will be a stable demand for tiles used for flooring and cladding within the EU. There are opportunities in the production of these products as long as producers comply strictly with the specifications set by the importer. Important European importers are Germany, Belgium / Luxembourg, Spain, and France.

Flagstones, setts and curbstones account for another 11 percent of the total value of EU imports of natural stone and natural stone products. There are opportunities in the production of these products as long as producers comply strictly with the specifications set by the importer. Important European importers are Germany, France, the Netherlands, and Belgium/ Luxembourg.

Slabs
The exports of these products are considered as a third stage in exporting to the EU market. Compared to the production of tiles, larger equipment is needed in order to be able to saw large blocks. Slabs account for 9 percent of the total vale of EU imports of natural stone and natural stone products. It is expected that there will be a steady demand for slabs in the EU market especially in Spain, Italy, the United Kingdom, and Germany.

Funeral and other art
Funeral and other art account for 34 percent of the total value of EU imports of natural stone and natural stone products. There are possibilities for exporting funeral and other art to the EU.
However, the European demand is fully satisfied by the current suppliers, whereby new suppliers will have to conquer their part of the market at the expense of existing suppliers. Major EU importers of funeral and other art are Germany, the United Kingdom, Belgium/Luxembourg, France, and The Netherlands.

APPENDIX 1 DETAILED IMPORT/EXPORT STATISTICS

EUROPEAN UNION – TOTAL IMPORTS

EU Imports of natural stone by product group, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**1,938,195**	**9,609,069**	**2,183,752**	**9,584,188**	**2,188,271**	**10,483,012**
Extra EU	**899,994**	**4,887,082**	**1,128,848**	**5,394,182**	**1,167,039**	**6,062,039**
Developing countries	**720,028**	**3,251,075**	**923,885**	**3,741,765**	**948,654**	**3,865,275**
Product groups:						
Blocks	661,323	5,449,699	777,379	4,962,789	754,570	5,350,107
Flooring & Paving	209,725	465,191	224,524	540,731	227,985	454,713
Slabs	166,703	642,011	196,499	756,866	209,478	1,337,566
Setts, Curbstones & Flagstones	196,120	1,931,905	241,667	2,167,657	239,753	2,158,263
Funeral & other Art.	704,324	1,120,263	743,683	1,156,145	756,485	1,182,363

Source Eurostat (2002)

EU Imports of natural stone by major source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**1,954,708**	**9,659,336**	**2,202,703**	**9,643,558**	**2,209,211**	**10,548,131**
Extra EU	**904,682**	**4,903,768**	**1,136,075**	**5,419,244**	**1,175,663**	**6,086,841**
Developing Countries	**720,028**	**3,251,075**	**923,885**	**3,741,765**	**948,654**	**3,865,275**
Major sources						
Italy	517,617	900,471	487,844	896,857	475,650	806,291
India	230,897	932,353	289,385	1,089,906	275,132	1,038,544
China	119,430	611,311	183,415	787,355	198,237	819,131
Brazil	162,789	639,659	176,386	601,758	176,020	598,702
Spain	119,509	464,137	132,330	434,097	145,880	457,563
Portugal	100,816	654,929	110,353	783,359	106,687	769,609
Norway	79,791	977,789	90,599	951,011	103,337	1,493,539
South Africa	85,414	475,873	104,100	504,062	101,980	467,035
Belgium	76,179	1,221,900	73,052	678,302	73,120	763,591
Turkey	40,452	227,483	53,102	263,919	65,917	348,291
Fr Germany	53,400	312,929	61,949	325,282	62,759	271,332
France	53,741	405,639	75,104	464,777	49,943	586,140
Poland	27,892	290,796	28,583	300,243	28,100	286,365
Finland	30,681	161,351	27,173	140,015	26,815	136,231
Netherlands	25,539	109,540	29,165	141,037	24,607	120,315
Switzerland	15,580	39,928	20,859	48,134	19,247	53,380
Greece	20,369	41,106	22,227	49,629	18,469	35,585
Iran	8,632	35,732	13,244	46,824	17,722	58,109
Czech Rep.	15,902	203,375	17,004	217,706	17,157	204,783
Sweden	17,785	280,267	14,356	168,258	15,160	221,105
Saudi Arabia	7,396	26,219	12,499	39,762	13,150	37,210
USA	15,834	49,792	14,691	40,188	11,965	33,554
Egypt	8,050	43,811	9,659	53,898	10,990	67,853
Canada	7,286	26,041	11,447	38,369	10,080	30,841
Mozambique	6,348	26,904	9,903	38,887	9,946	37,970

Source Eurostat (2002)

EU IMPORTS OF SELECTED PRODUCT GROUPS BY SOURCE

EU Imports of blocks by source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**661,323**	**5,449,699**	**777,379**	**4,962,789**	**754,570**	**5,350,107**
Extra EU	**525,390**	**3,118,294**	**626,000**	**3,190,601**	**619,298**	**3,338,838**
Developing Countries	**426,775**	**2,094,127**	**514,087**	**2,264,151**	**500,636**	**2,236,799**
Top 3 suppliers:						
Brazil	146,421	584,609	153,270	531,675	148,043	513,903
India	133,788	694,234	171,043	797,795	145,552	696,262
South Africa	78,657	448,256	96,966	476,236	96,746	449,192
Top 10 developing countries:						
Brazil	146,421	584,609	153,270	531,675	148,043	513,903
India	133,788	694,234	171,043	797,795	145,552	696,262
South Africa	78,657	448,256	96,966	476,236	96,746	449,192
Iran	6,357	29,584	9,193	35,655	14,184	49,623
China	11,102	52,707	9,964	42,696	13,908	73,819
Turkey	9,171	54,412	12,377	70,954	13,451	84,078
Saudi Arabia	6,162	22,381	11,336	36,588	12,090	35,790
Mozambique	6,307	26,806	9,774	38,429	9,484	36,560
Egypt	6,209	37,120	7,288	43,319	8,768	58,845
Venezuela	3,327	29,772	4,654	37,053	5,595	44,057

Source Eurostat (2002)

EU Imports of flooring and cladding by source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**226,238**	**515,458**	**243,475**	**600,101**	**248,925**	**519,832**
Extra EU	**53,848**	**158,784**	**71,215**	**196,631**	**77,469**	**191,976**
Developing Countries	**38,084**	**90,156**	**50,315**	**122,544**	**56,130**	**118,398**
Top 3 suppliers:						
Italy	91,446	160,697	83,538	150,995	82,017	133,712
Spain	19,220	33,232	22,230	38,598	26,429	38,811
China	9,938	25,904	16,228	50,057	19,214	42,635
Top 10 developing countries:						
China	9,938	25,904	16,228	50,057	19,214	42,635
India	12,149	23,881	13,493	27,373	14,094	27,282
Turkey	6,994	16,784	10,725	20,731	12,433	23,787
Brazil	4,632	12,051	5,379	13,865	4,635	10,250
Vietnam	1,561	6,231	1,535	5,653	2,662	9,802
Morocco	895	933	1,191	499	2,102	671
Tunisia	917	1,244	982	1,956	2,044	3,897
Iran	1,039	2,500	1,336	3,237	1,308	2,251
Indonesia	122	175	1,021	1,278	635	714
For.JRep.Mac	335	495	178	395	465	1,355

Source Eurostat (2002)

EU Imports of slabs by source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**166,703**	**642,011**	**196,499**	**756,866**	**209,478**	**1,337,566**
Extra EU	**47,746**	**244,641**	**67,614**	**379,073**	**85,725**	**841,716**
Developing Countries	**37,690**	**170,691**	**54,143**	**215,791**	**64,398**	**297,370**
Top 3 suppliers:						
Italy	60,008	123,093	62,101	126,343	57,780	104,420
Spain	12,974	42,077	15,516	43,597	18,687	58,313
Turkey	6,222	30,316	10,392	43,954	15,432	76,861
Top 10 developing countries:						
Turkey	6,222	30,316	10,392	43,954	15,432	76,861
India	7,055	31,740	10,921	41,314	12,244	47,011
China	6,522	24,301	7,192	20,462	11,509	43,010
Brazil	7,161	32,953	9,643	37,465	10,571	40,148
South Africa	4,102	22,283	5,200	24,756	3,569	15,298
Egypt	1,199	5,701	1,707	9,295	1,329	6,959
Croatia	211	856	1,223	8,650	1,193	8,630
Zimbabwe	99	371	204	847	945	3,544
For.JRep.Mac	1,321	4,682	1,572	4,774	900	3,324
Iran	332	1,666	706	3,265	759	3,029

Source Eurostat (2002)

EU Imports of landscape design by source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**196,120**	**1,931,905**	**241,667**	**2,167,657**	**239,753**	**2,158,263**
Extra EU	**104,568**	**1,096,058**	**141,070**	**1,277,439**	**145,085**	**1,285,148**
Developing Countries	**72,973**	**652,174**	**107,743**	**809,226**	**111,835**	**833,195**
Top 3 suppliers:						
China	45,858	404,840	74,114	530,102	67,821	475,367
Portugal	23,184	264,253	27,945	306,880	24,825	324,881
India	12,264	101,777	17,077	129,474	22,620	169,010
Top 10 developing countries:						
China	45,858	404,840	74,114	530,102	67,821	475,367
India	12,264	101,777	17,077	129,474	22,620	169,010
Turkey	6,210	103,428	6,510	97,427	9,721	130,585
Brazil	1,746	5,839	2,923	9,165	4,650	17,735
Argentina	3,859	21,226	4,496	25,086	4,385	23,312
Vietnam	1,363	10,339	1,838	14,340	1,676	10,685
Croatia	3	66	80	627	367	3,227
Mexico	403	2,530	61	405	230	1,417
Indonesia	4	18	32	56	71	394
Tunisia	52	100	172	371	55	102

Source Eurostat (2002)

EU Imports of funeral and other art design by source, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	**Volume**	**Value €**	**Volume**	**Value €**	**Volume**
Total	**704,324**	**1,120,263**	**743,683**	**1,156,145**	**756,485**	**1,182,363**
Extra EU	**173,130**	**285,991**	**230,176**	**375,500**	**248,086**	**429,163**
Developing Countries	**144,506**	**243,927**	**197,597**	**330,053**	**215,655**	**379,513**
Top 3 suppliers:						
Italy	336,711	491,015	307,930	448,370	303,998	436,786
China	46,010	103,559	75,917	144,038	85,785	184,300
India	65,641	80,721	76,851	93,950	80,622	98,979
Top 10 developing countries:						
China	46,010	103,559	75,917	144,038	85,785	184,300
India	65,641	80,721	76,851	93,950	80,622	98,979
Turkey	11,855	22,543	13,098	30,853	14,880	32,980
Brazil	2,829	4,207	5,171	9,588	8,121	16,666
Pakistan	2,269	2,641	4,324	5,120	4,461	4,969
Vietnam	1,711	7,126	4,361	15,852	4,391	16,233
Croatia	1,294	4,443	1,869	6,505	2,043	6,348
Indonesia	1,268	1,107	1,203	1,241	1,604	1,034
Thailand	558	1,332	1,471	3,851	1,525	2,999
Iran	820	1,709	1,976	4,494	1,465	3,186

Source Eurostat (2002)

EU Imports of natural stone from developing countries, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	Volume	Value €	Volume	Value €	Volume
Total	**1,954,708**	**9,659,336**	**2,202,703**	**9,643,558**	**2,209,211**	**10,548,131**
Extra EU	**904,682**	**4,903,768**	**1,136,075**	**5,419,244**	**1,175,663**	**6,086,841**
Developing Countries	**720,028**	**3,251,075**	**923,885**	**3,741,765**	**948,654**	**3,865,275**
Top 10 developing countries:						
India	230,897	932,353	289,385	1,089,906	275,132	1,038,544
China	119,430	611,311	183,415	787,355	198,237	819,131
Brazil	162,789	639,659	176,386	601,758	176,020	598,702
South Africa	85,414	475,873	104,100	504,062	101,980	467,035
Turkey	40,452	227,483	53,102	263,919	65,917	348,291
Iran	8,632	35,732	13,244	46,824	17,722	58,109
Saudi Arabia	7,396	26,219	12,499	39,762	13,150	37,210
Egypt	8,050	43,811	9,659	53,898	10,990	67,853
Mozambique	6,348	26,904	9,903	38,887	9,946	37,970
Vietnam	4,858	24,590	8,318	38,541	9,155	38,521
Croatia	5,409	41,819	6,562	48,722	8,349	62,745
Morocco	4,142	20,781	5,883	30,804	7,117	34,179
Zimbabwe	2,051	6,452	5,632	17,252	6,375	22,672
For.JRep.Mac	3,881	13,928	4,517	17,728	6,003	28,035
Pakistan	3,018	6,221	5,700	10,645	5,899	10,256
Angola	1,441	9,424	4,181	20,922	5,871	33,890
Venezuela	3,332	29,800	4,658	37,055	5,604	44,058
Argentina	4,672	24,018	5,536	28,559	5,378	26,581
Tunisia	3,129	13,837	3,908	17,118	4,768	21,012
Indonesia	1,457	1,531	2,406	3,013	2,383	2,259
Slovenia	1,151	3,076	1,331	3,305	1,771	4,203
Mexico	1,321	4,509	1,219	2,935	1,736	3,738
Thailand	752	1,972	1,668	4,244	1,653	3,098
Lebanon	431	2,530	1,164	7,205	1,478	8,718
Philippines	1,543	1,396	1,883	3,163	1,319	663

Source Eurostat (2002)

EU EXPORTS – TOTAL EXPORTS

EU Exports of natural stone by product group, 1998 – 2000, € 1,000/Tonnes

	1999		2000		2001	
	Value €	Volume	Value €	Volume	Value €	Volume
Total	**2,982,655**	**7,713,534**	**3,362,857**	**8,362,234**	**3,366,794**	**8,010,366**
Extra EU	**1,632,543**	**3,568,044**	**1,953,916**	**4,031,502**	**2,001,149**	**4,087,395**
Developing countries	**440,086**	**1,488,690**	**531,569**	**1,886,028**	**566,394**	**1,949,039**
Product groups:						
Blocks	189,124	1,971,634	219,776	2,008,402	221,782	1,932,898
Flooring & Paving	658,853	1,050,777	764,866	1,130,967	769,308	1,118,059
Slabs	313,102	900,883	396,694	1,156,215	386,261	1,162,378
Setts, Curbstones & Flagstones	145,067	1,322,258	163,699	1,500,998	144,961	1,263,545
Funeral & other Art.	1,676,509	2,467,982	1,817,822	2,565,652	1,844,482	2,533,486

Source Eurostat (2002)

APPENDIX 2 STANDARDS ORGANISATIONS

INTERNATIONAL
International Standardisation Institute (ISO)

Address:	P.O. Box 56, CH-1211 Geneva, Switzerland
Telephone:	+ 41 (0) 22 7490111
Telefax:	+ 41 (0) 22 7333430
E-mail:	central@iso.ch
Internet:	www.iso.ch

EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Committee for Normalisation

Address:	rue de Stassart 36, B-1050 Brussels, Belgium
Telephone:	+ 32 (0) 2 5500811
Telefax:	+ 32 (0) 2 5500819
E-mail:	infodesk@cenorm.be
Internet:	www.cenorm.be

BELGIUM
Institut Belge de Normalisation (IBN)

Address:	avenue de la Brabançonne 29, B-1000 Brussels, Belgium
Telephone:	+ 32 (0) 2 7380105
Telefax:	+ 32 (0) 2 7334264
E-mail:	info@ibn.be
Internet:	www.ibn.be

FRANCE
Association Française de Normalisation (AFNOR)

Address:	Tour Europe, F-92049 Paris la Défense Cedex, France
Telephone:	+ 33 (0) 1 42915555
Telefax:	+ 33 (0) 1 42915656
E-mail:	info.normes@afnor.fr
Internet:	www.afnor.fr

GERMANY
Deutsches Institut für Normung e.V. (DIN)

Address:	Burggrafenstrasse 6, D-10787 Berlin, Germany
Telephone:	+ 49 (0) 30 26010
Telefax:	+ 49 (0) 30 26011231
E-mail:	postmaster@din.de
Internet:	www.din.de

ITALY
Ente Nazionale Italiano di Unificazione (UNI)

Address:	Via Battistotti Sassi 11b, I-20133 Milano, Italia
Telephone:	+ 39 02 700241
Telefax:	+ 39 02 70106106
E-mail:	uni@uni.com
Internet:	www.uni.com

LUXEMBOURG
Service de l'Energie de l'Etat (SEE)

Address:	Département Normalisation, P.O. Box 10, L-2010 Luxembourg
Telephone:	+ 352 (0) 46 97461
Telefax:	+ 352 (0) 22 2524
E-mail:	see.normalisation@eg.etat.lu
Internet:	www.etat.lu/SEE/

THE NETHERLANDS
Nederlands Normalisatie-instituut (NEN)
Netherlands Standardisation Institute

Address:	P.O. Box 5059, 2600 GB Delft, The Netherlands
Telephone:	+ 31 (0) 15 2690390
Telefax:	+ 31 (0)15 2690190
E-mail:	info@nni.nl
Internet:	www.nni.nl

SPAIN
Associación Espanola de Normalización y Certificación (AENOR)

Address:	Génova 6, E-28004 Madrid, Spain
Telephone:	+ 34 (0) 91 432 6000
Telefax:	+ 34 (0) 91 310 4032
E-mail:	info@aenor.es
Internet:	www.aenor.es

UNITED KINGDOM
British Standards Institution (BSI)

Address:	389 Chiswick High Road, London W4 4AL, United Kingdom
Telephone:	+ 44 (0) 20 89969000
Telefax:	+ 44 (0) 20 89967400
E-mail:	info@bsi-global.com
Internet:	www.bsi -global.com

APPENDIX 3 SOURCES OF PRICE INFORMATION

Price information can be obtained from importers.
Please refer to appendix 10 for their contact details.

Five web sites providing price information are:

http://www.marbleandmore.com,

http://www.findstone.com,

http://rvkfloors.com/marble.htm,

http://www.stone-network.com/, and

http://www.stonesource.com/

APPENDIX 4 TRADE ASSOCIATIONS

FRANCE

C.S.E.C.

Address:	10 Rue du Dèbarcadere, 75852 Paris Cedex, France
Telephone:	+ 33 (0) 1 40551313
Telefax:	+ 33 (0) 1 40551319

C.S.N.M.C.

Address:	215 Bis, bd Saint-Germain, 75007 Paris, France
Telephone:	+ 33 (0) 1 45489459
Telefax:	+ 33 (0) 1 45447792

Federation Francaise de la Pierre et du Marbre

Address:	Rue Alfred Roll 3, 75849 Paris Cedex 17, France
Telephone:	+ 33 (0) 1 44014701
Telefax:	+ 33 (0) 1 40540328

GERMANY

Deutscher Naturwerkstein Verband E.V. (DNV)

Address:	4 Sanderstrabe, 97070 Wurzburg, Germany
Telephone:	+ 49 (0) 931 12061
Telefax:	+ 49 (0) 931 14549
E-mail:	dnv@naturstein-netz.de
Internet:	www.dnv.naturstein-netz.de

GREECE

Central & Western Macedonia Marble Association

Address:	269, Kentrikis Str., P.O. Box 136, 59100 Veria, Greece
Telephone:	+ 30 (0) 331 62816
Telefax:	+ 30 (0) 331 24533

Commercial Agents' Assoc. of Nothern Greece

Address:	54, Tsimiski Str., 546 23 Thessaloniki, Greece
Telephone:	+ 30 (0) 31 277798
Telefax:	+ 30 (0) 31 285265

Tranovalto Marble Association

Address:	Tranovalto - 505 00, Servia Greece
Telephone:	+ 30 (0) 464 51269
Telefax:	+ 30 (0) 464 51269
E-mail:	
Internet:	

NETHERLANDS

Algemene Nederlandse Bond van Natuursteenbewerkende bedrijven

Address:	Kastanjelaan, 6 b, 3833 AN Leusden, The Netherlands
Telephone:	+ 31 (0) 33 4947518
Telefax:	+ 31 (0) 334948350

Bedrijfschap Natuursteenbedrijf

Address:	Burgemeester Elsenlaan 312, Rijswijk, The Netherlands
Telephone:	+ 31 (0) 703366555
Telefax:	+ 31 (0) 70 3191179

Vereniging Nederlandse Natuursteen Importeurs (VNNI)

Address:	P.O. Box 157, 6100 AD Echt, The Netherlands
Telephone:	+ 31 (0) 4754 82200
Telefax:	+ 31 (0) 4754 86355
E-mail:	info@vnni.nl
Internet:	www.vnni.nl

ITALY

A.P.L. Associazione "Pietra Di Luserna"

Address:	Via Duca Amedeo, 18, 12032 Barge, Italy
Telephone:	+ 39 0175 343727
Telefax:	+ 39 0175 343782

ASMAVE

Address:	Via Napoleone, 26, 37015 Domegliara, Italy
Telephone:	+ 39 045 7731822
Telefax:	+ 39 045 6861723

Assocave

Address:	Via Trabucchi, 27, 28037 Domodossola, Italy
Telephone:	+ 39 0324 44666
Telefax:	+ 39 0324 41316

Assodiam

Address:	Via Battistotti Sassi, 11/B, 20133 Milano, Italy
Telephone:	+ 39 02 73971
Telefax:	+ 39 02 7397316
E-mail:	anima@anima-it.com
Internet:	www.anima-it.com

Assolame

Address:	Via Cenisio, 50, 20154 Milano, Italy
Telephone:	+ 39 02 3450344
Telefax:	+ 39 02 316836

Cosmave

Address: Via Garibaldi, 97,
55045 Pietrasanta, Italy
Telephone: + 39 0584 791297
Telefax: + 39 0584 790885
E-mail: info@cosmave.it
Internet: www.cosmave.it

SPAIN

ASCER

Address: Camino Caminas s/n,
12003 Castellon, Italy
Telephone: + 34 (0) 964 727 200
Telefax: + 34 (0) 964 727 212
E-mail: global@ascer.es
Internet: www.ascer.es

UNITED KINGDOM

Builders Merchants Federation

Address: 15 Soho Square,
London W1V 5FB, United Kingdom
Telephone: + 44 (0) 870 901 33 80
Telefax: + 44 (0) 2077 34 27 66
E-mail: info@bfm.org.uk
Internet: www.bfm.org.uk

The Stone Federation Great Britain

Address: Construction House 56-64 Leonard street,
London EC2A 4JX, United Kingdom
Telephone: + 44 (0) 20 7608 5094
Telefax: + 44 (0) 20 7608 5081
E-mail: jane.buxey@nscc.org.uk
Internet: www.stone-federationgb.org.uk

BELGIUM

Federation Belge des Assoc. de Maitres Tailleurs de Pierres

Address: Galerie du Centre, Bureau 220,
1000 Brussels, Belgium
Telephone: + 32 (0) 2 2230647
Telefax: + 32 (0) 2 2230538
E-mail: steenhouwers@confederatiebouw.be/steenhouwers
Internet: www.confederatiebouw.be/steenhouwers

Federation Nat. des Maitres-Marbriers de Belgique

Address: Chaussée de Mons 144,
1070 Brussels, Belgium
Telephone: + 32 (0) 2 5232051
Telefax: + 32 (0) 2 5232077

APPENDIX 5 TRADE FAIR ORGANISERS

ITALY

Carraramarmotec

Internazionale Marmi e Macchine Carrara Spa

Address:	Viale Galilei, 133,
	54036 Marina di Carrara , Italia
Telephone:	+ 39 0585 787963
Fax:	+ 39 0585 787602
E-mail:	imm@immcarrara.com
Internet	http://www.marmotec.it/

Marmomacc

Verona Exhibition Centre

Address:	Viale del Lavoro,
	8 - 37100 Verona, Italia
Telephone:	+ 39 045 8298111
Fax:	+ 39 045 8298288
E-mail:	albano@veronafiere.it
Internet	www.marmomacc.it

SPAIN

Piedra

IFEMA, Feria de Madrid

Address:	Parque Ferial Juan Carlos I,
	28042 Madrid, Spain
Telephone:	+ 34 (0) 91 722 5042
Fax:	+ 34 (0) 91 722 5788
E-mail:	piedra@ifema.es
Internet	www.piedra.ifema.es

Funeralia

Fira de Girona

Address:	Pg. De la Devesa, 34-36,
	17001, Girona, Spain
Telephone:	+ 34 (0) 972 419100
Fax:	+ 34 (0) 972 208974
E-mail:	fira@grn.es
Internet	www.funeralia.com

GERMANY

Fachmesse Naturstein

Josef Werner Schmid GmbH

Address:	Goldbergstrasse 1,
	D-89435 Finningen Morslingen, Germany
Telephone:	+ 49 (0) 907 42039
Fax:	+ 49 (0) 907 45454
E-mail:	
Intenet:	www.jws.de

Stone+ tec

NürnbergMesse GhmB

Address:	Messezentrum,
	D-90471 Nürnberg, Germany
Telephone:	+ 49 (0) 911 8606 0
Fax:	+ 49 (0) 911 8606 8228
E-mail:	info@nuernbergmesse.de
Internet	www.stone-tec.com

FRANCE

Funeraire

Address:	22, avenue Franklin Roosevelt,
	F-75008 Paris, France
Telephone:	+ 33 (0) 1 4076 4500
Fax:	+ 33 (0) 1 4563 7824
E-mail:	funeraire@cosp.fr

APPENDIX 6 TRADE PRESS

GERMANY
Naturstein
Monthly Magazine
Ebner Verlag GmbH & Co. KG

Address:	Karlstrasse 41, 89073 Ulm, Germany
Postbox:	3060 , 89020 Ulm, Germany
Telephone:	+ 41 (0) 731 152 01 92 (Rudolph Ites)
Telefax:	+ 41 (0) 731 152 01 59
E-mail:	naturstein@ebnerverlag.de
Intenet:	www.natursteinonline.de

Stein

Address:	Ettaler-Mandl-Weg 15b, D-82418 Murnau. Germany
Postbox:	Postfach 12 41, D-82412 Murnau, Germany
Telephone:	+ 49 (0) 8841 2020
Telefax:	+ 49 (0) 8841 2040
E-mail:	redaktion.stein@t-online.de
Intenet:	www.stein-netz.de

ITALY
Interstone Press

Address:	Via Adriano Garbini, 15, 37135 Verona, Italy
Telephone:	+ 39 045 8200808
Telefax:	+ 39 045 8200820

Universal stone
Gruppo Editoriale Faenza Editrice Spa

Address:	Via Pier de Crescenzi 44, 48018 Faenz, Italy
Telephone:	+ 39 0546 670411
Telefax:	+ 39 0546 660440
E-mail:	info@faenza.com
Intenet:	http://www.faenza.com/ RivisteDx.asp?ID=77&Flagk=1

THE NETHERLANDS
Natuursteen Totaal.
Edition every 3 months, part of Monthly Magazine Natuursteen (same address).
Wijlhuizen Vaktijdschriften

Address:	Wilhelminasingel 4, 6524 AK Nijmegen, The Netherlands
Telephone:	+ 31 (0) 24 360 52 53
Telefax:	+ 31 (0) 24 360 52 10
E-mail:	redactie@wijlhuizen.com
Internet:	none

SPAIN
LITOS
Publicaciones LITOS S.L.

Address:	Plaza Angel Carbajo, 6-9-B, 28020 Madrid, Spain
Telephone:	+ 34 (0) 91 570 5419
Telefax:	+ 34 (0) 91 570 9855
E-mail:	litos@litosonline.com
Intenet:	www.litosonline.com

APPENDIX 7 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre (ITC)
Address: Palais des Nations,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300111
Fax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA
Bundeskammer der gewerblichen Wirtschaft
Austrian Federal Economic Chamber
Address: Wiedner Hauptstrasse 63,
A-1045 Vienna, Austria
Telephone: + 43 (0) 1 50105
Telefax: + 43 (0) 1 50105
E-mail: wirtschaftskammer@callcenter.co.at
Internet: www.wk.or.at

DENMARK
Danish Import Promotion Office for Products from Developing Countries (DIPO)
Danish Import Promotion Office for Products from Developing Countries
Address: Danish Chamber of Commerce, Børsen,
DK-1217 Copenhagen, Denmark
Telephone: + 45 (0) 33 950500
Telefax: + 45 (0) 33 120525
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

FRANCE
Centre Français du Commerce Exterieur (C.F.C.E.)
Address: 10, avenue d'Iéna,
F-75116 Paris, France
Telephone: + 33 (0) 1 40733000
Telefax: + 33 (0) 1 40733979
E-mail: orientation@cfce.fr
Internet: www.cfce.fr

COLEACP
Address: 5, rue de la Corderie, Centra 342,
F-94586 Rungis Cedex, France
Telephone: + 33 (0) 1 41800210
Telefax: + 33 (0) 1 41800219
E-mail: coleacp@coleacp.org
Internet: www.coleacp.org

GERMANY
BfAI, Federal Office of Foreign Trade Information
Address: Agrippastrasse 87-93,
D-50676 Köln, Germany
Telephone: + 49 (0) 221 2057-0
Fax: + 49 (0) 221 2057-212
E-mail: info@bfai.de
Internet: www.bfai.com

ITALY
Instituto Nazionale per il Commercio Estero (ICE)
Italian Institute for Foreign Trade
Address: Via Liszt 21, P.O. Box 10057,
I-00144 Rome, Italy
Telephone: + 39 06 59921
Telefax: + 39 06 59647438
E-mail: ice@ice.it
Internet: www.ice.it

NORWAY
Norad, Norwegian Agency for Development Co-operation
Address: Ruseløkkveien 26, P. O. Box 8034 Dep.,
0030 Oslo, Norway
Telephone: + 41 (0) 22 314400
Fax: + 41 (0) 22 314403
Internet: www.norad.no

SWEDEN
SIDA, Swedish International Development Agency
Swedish International Development Agency
Address: S-10525 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Telefax: + 46 (0) 8 208864
E-mail: info@sida.se
Internet: www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme
Swiss Import Promotion Programme
Address: Stampfenbachstrasse 85, P.O. Box 492,
CH-8035 Zürich, Switzerland
Telephone: + 41 (0) 1 3655200
Telefax: + 41 (0) 1 3655202
E-mail: info@sippo.ch
Internet: www.sippo.ch

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries
Centre for the Promotion of Imports from developing countries
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

APPENDIX 8 OTHER USEFUL ADDRESSES

Netherlands
Nationaal Dubo Centrum

Address:	PO. Box 29046,
	3001 GA Rotterdam, The Netherlands
Telephone:	+ 31 (0) 10 412 47 66
Telefax:	+ 31 (0) 10 214 29 25
E-mail:	infodesk@dubo-centrum.nl
Internet:	www.dubo-centrum.nl

Stichting MRPI

Address:	PO. Box 2149,
	6802 CC Arnhem, The Netherlands
Telephone:	+ 31 (0) 26 363 35 75
Telefax:	+ 31 (0) 26 363 35 79
E-mail:	info@mrpi.nl
Internet:	www.mrpi.nl

CBI/Accesguide (CBI's database on European non-tariff trade barriers)

Address:	P.O. Box 30009,
	3001 DA Rotterdam, The Netherlands
Telephone:	+ 31 (0) 10 2013434
Fax:	+ 31 (0) 10 4114081
Email:	cbi@accessguide.nl
Internet:	www.cbi.nl/accessguide

UNCTAD
United Nations Conference on Trade and Development

Address:	Palais des Nations,
	CH-1211 Geneva, Switzerland
Telephone:	+ 41 (0) 22 90712 34
Fax:	+ 41 (0) 22 9070043
E-mail:	ers@unctad.org
Internet:	www.unctad.org

Contact point EU ECO-label
Commission of the European Communities

Address:	DG XI-E4, Rue de la Loi 200,
	1049 Brussels,Belgium
Telephone:	+ 32 (0) 2 2990324
Fax:	+ 32 (0) 2 2955684
Internet:	www.europa.eu.int/ecolabel

Standards and regulations
http://www.cenorm.be
Internet site of the European Committee for standardisation.

http://europa.eu.int/comm/environment/ecolabel/
Internet site for the European Eco-Label Scheme.

http://www.nni.nl/nl/pro/normshop/
Internet-site where European Norms can be downloaded (not free).

Trade press
http://www.natursteinonline.de
German magazine for the natural stone branch.

www.stein-netz.de
German magazine for the natural stone branch.

http://www.litosonline.com
Spanish magazine for the natural stone branch.

http://www.stonereport.com/
German providing monthly information covering the international stone sector.

Natural stone sites
http://www.marbleandmore.com
Internet portal offering up to date information on events, trade fairs and specialised magazines.

http://www.findstone.com/
This site contains a market place for natural stone.
It contains an online store, specialist advice on the use of natural stone products and a stone library.

EU-LDC co-operation
http://www.eu-ldc.org
This web-site provides information, analysis, and views on trade, investment and aid between European Union, its member states (EU) and developing countries (LDC).

APPENDIX 9 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea). Countries marked with ** classify as least developed countries which eliminates duties and quotas for all exports to the EU under the "Everything But Arms (EBA)" initiative.

Afghanistan **
Albania
Algeria
Angola **
Anguilla
Antigua and Barbuda
Argentina
Armenia
Aruba
Azerbaijan
Bahrain
Bangladesh **
Barbados
Belize
Benin **
Bhutan **
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso **
Burundi **
Cambodia **
Cameroon
Cape Verde **
Central African rep. **
Chad **
Chile
China
Colombia
Comoros **
Congo, Rep
Congo, Dem. Rep. **
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti **
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea **
Eritrea **
Ethiopia
Fiji
French Polynesia
Gabon
Gambia **
Georgia
Ghana
Gibraltar
Grenada
Guatemala
Guinea **
Guinea-Bissau **
Guyana
Haiti **
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati **
Korea, Rep. of
Korea, South
Kyrghyz Rep,
Laos **
Lebanon
Lesotho **
Liberia **
Libya
Macao
Macedonia
Madagascar **
Malawi **
Malaysia
Maldives **
Mali **
Malta
Marshall Islands
Mauritania **
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique **
Myanmar **
Namibia
Nauru
Nepal **
Netherlands Antilles
New Caledonia
Nicaragua
Niger **
Nigeria
Niue
Northern Marianas
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda **
Samoa (Western) **
São Tomé & Principe **
Saudi Arabia
Senegal
Seychelles
Sierra Leone **
Slovenia
Solomon Islands **
Somalia **
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan **
Surinam
Swaziland
Syria
Tajikistan
Tanzania **
Thailand
Timor
Togo **
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu **
Uganda **
Uruguay
Uzbekistan
Vanuatu **
Venezuela
Vietnam
Virgin Islands (UK)
Wallis & Futuna
Western Samoa
Yemen **
Yugoslavia, Fed. Rep.
Zambia **
Zimbabwe

Note: Eurostat figures do not include figures for Cook Islands, Niue, St, Kitts-Nevis, Timor and Tokelau (november 2001)

APPENDIX 10 LIST OF EU IMPORTERS

THE NETHERLANDS

Beisterveld
Address: Protonweg 4,
3542 AJ Utrecht, The Netherlands
Telephone: + 31 (0) 30 24140 21
Telefax: + 31 (0) 30 241 17 00
E-mail: info@beisterveld-natuursteen.nl
Internet: www.beisterveld-natuursteen.nl

Dijnamar
Address: De Geerden 10,
5334 LE Velddriel, The Netherlands
Telephone: + 31 (0) 418 634 400
Telefax: + 31 (0) 418 631 999
E-mail: info@dijnamar.nl
Internet: www.dijnamar.nl

Hessels
Address: Asterweg 27-33,
1031 HM Amsterdam, The Netherlands
Telephone: + 31 (0) 20 632 40 21
Telefax: + 31 (0) 20 636 63 46
E-mail: hessels@natuursteenhandel.com
Internet: www.natuursteenhandel.com

Holland Graniet (imports blocks)
Address: Steenhouwer 2,
9502 ET Stadskanaal, The Netherlands
Telephone: + 31 (0) 599 620 320
Telefax: + 31 (0) 619 669
E-mail: info@hollandgraniet.nl
Internet: www.hollandgraniet.nl

Natuursteen Holland
Address: Achter de Brinken 6,
9462 RH Gasselte, The Netherlands
Telephone: + 31 (0) 599 564 655
Telefax: + 31 (0) 599 564 805
E-mail: info@natuursteen-holland.nl
Internet: www.natuursteen-holland.nl

Oprey
Address: Havenweg 18,
6101 AB Echt, The Netherlands
Telephone: + 31 (0) 475 482 200
Telefax: + 31 (0) 475 486 355
E-mail: oprey@tip.nl
Internet: www.oprey.com

Pelt & Hooykaas
Address: Bijlstraat 5,
3087 AA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 495 20 40
Telefax: + 31 (0) 10 495 36 50
E-mail: info-elcemo@pelt-hooykaas.nl
Internet: www.pelt-hooykaas.nl

Pristone
Address: De Lind 18,
4841 KC Prinsenbeek, The Netherlands
Telephone: + 31 (0) 76 541 31 25
Telefax: + 31 (0) 76 542 05 33
E-mail: hgaschoot@pristone.nl
Internet: www.pristone.nl

Reek (imports blocks)
Address: Neutronweg 9,
1627 LG Hoorn, The Netherlands
Telephone: + 31 (0) 229 210 341
Telefax: + 31 (0) 229 218 762
E-mail: graniet@janreek.demon.nl
Internet: www.janreek.demon.nl

Snijders
Address: Remmingweg 41,
1332 BD Almere, The Netherlands
Telephone: + 31 (0) 36 532 08 88
Telefax: + 31 (0) 36 532 23 19
E-mail: info@snijders.com

Eurostone
Address: Industriepark 8,
6603 BG Wijchen, The Netherlands
Telephone: + 31 (0) 24 641 67 17
Telefax: + 31 (0) 24 642 09 90
E-mail: eurostone.nl@hetnet.nl

BELGIUM

BMB (imports blocks)
Address: Waregemseweg 154,
B-9790 Wortegem-Petegem, Belgium
Telephone: + 32 (0)56 68 05 61
Telefax: + 32 (0) 56 68 05 65
E-mail: info@bmb-stone.be
Internet: www.bmb-stone.be

Brachot-Hermant, N.V. (imports blocks)
Address: E3-Laan 86-92,
9800 Deinze, Belgium
Telephone: + 32 (0) 93 81 81 81
Telefax: + 32 (0) 93 86 97 25
E-mail: info@brachot.com
Internet: www.brachot.be/en/company/international.asp

Carrieres de Sprimont, S.A.
Address: Rue Joseph Potier, 13,
B4140 Sprimont, Belgium
Telephone: + 32 (0) 43 82 13 79
Telefax: + 32 (0) 43 82 26 20
E-mail: ucsmb@belgacom.net
Internet: www.ucsmb.be/sprimont.html

Groupements Carriers Wallons
Address: Rue de la Goyette, 11,
B-5030 Lonzee, Belgium
Telephone: + 32 (0) 473 48 08 67
Telefax: + 32 (0) 81 60 18 34
E-mail: johan.bosmans@euronet.be

La Pierre Bleue Belge, S.A.
Address: 1 Chemin de Carrieres,
7063 Neufvilles, Belgium
Telephone: + 32 (0) 67 34 68 00
Telefax: + 32 (0) 67 34 68 01
E-mail: info@pierrebleuebelge.be
Internet: www.prierrebleuebelge.be

ITALY
Alimonto (imports blocks)
Address: Via per Farra Olivana, 15,
24050, COVO (BG), Italy
Telephone: + 39 0 363 93 03 11
Telefax: + 39 0 363 93 03 12
E-mail: info@alimonti.com
Internet: www.alimonti.com

Antonili Luigi & s.p.a. (imports blocks)
Address: Via Marconi, 101, 37010 Sega di Cavaion/
P.O.Box 78,
37015 Domegliara (Verona) Italy
Telephone: + 39 0 45 683 66 11
Telefax: + 39 0 45 683 66 66
E-mail: al.spa@antolini.it
Internet: www.antolini.it

Cardi Marmi. (imports blocks)
Address: Frazione Corneto n.1,
63041 Acquasanta Terme (AP), Italy
Telephone: + 39 0 736 80 01 10
Telefax: + 39 0 736 80 00 19
E-mail: info@cardimarmi.com
Internet: www.cardimarmi.com

Cortesi Graniti
Address: Via Madonna della Neve, 12,
24060 Zandobbio (BG), Italy
Telephone: + 39 0 35 94 04 20
Telefax: + 39 0 35 94 47 55
E-mail: info@cortesigraniti.it
Internet: www.cortesigraniti.it

Franco Caruso (imports blocks)
Address: 97019 Vittoria (RG) Italy
Telephone: + 39 0 932 80 83 01
Telefax: + 39 0 736 80 83 02
E-mail: Caruso@francocaruso.com
Internet: www.francocaruso.com

Graniti Carobbio (imports blocks)
Address: Via Tresolzio, 39,
24060 Carobbio degli Angeli (BG), Italy
Telephone: + 39 0 35 95 33 44
Telefax: + 39 0 35 95 21 76
E-mail: info@graniticarobbio.com/
export@graniticarobbio.com
Internet: www.graniticarobbio.com

MarmiMincio
Address: Via Scarpina, 1,
37067 Salionze di Valeggio (Verona), Italy
Telephone: + 39 0 457 94 50 02
Telefax: + 39 0 457 94 51 32
E-mail: marmimincio@icmnet.net
Internet: www.marmi-mincio.com

Marmi Valpolicella
Address: Via Brennero, 7,
37020 Negarine (Verona), Italy
Telephone: + 39 0 456 85 90 20
Telefax: + 39 0 457 72 66 60
E-mail: marmi.valpolicella@lin.it
Internet: www.valpolicella.it

Nuova Serpentino D'Italia S.p.A.
Address: Castellaccio, 1,
23023 Chlesa in Valmalenco (So), Italy
Telephone: + 39 0 342 45 11 19
Telefax: + 39 0 342 45 21 27
E-mail: info@serpentino.it
Internet: www.serpentino.it

Pele Granits Italia (imports blocks)
Address: Loc. Piano della Quercia,
54016 Licciana N. (MS), Italy
Telephone: + 39 0 187 47 17 84
Telefax: + 39 0 187 47 17 93
E-mail: info@pelegranits.com
Internet: www.pelegranits.com

SPAIN
Bateig, piedras naturals
Address: Cami de Casella, 112 (Barrio Estacion),
03660 NOVELDA (Alicante), Spain
Telephone: + 34 (0) 965 604 319/ 965 606 143
Telefax: + 34 (0) 965 605 396
E-mail: admin@bateig.com
Internet: www.bateig.com

Bermarmol, S.A. (imports blocks)
Address: Paraje Ledua 1, P.O.Box 62,
03660 NOVELDA (Alicante)
Telephone: + 34 (0) 96 560 05 12
Telefax: + 34 (0) 96 560 58 17
E-mail: sales@bermarmol.com
Internet: www.bermarmol.com

Ingemar, S.A. (imports blocks)
Address: Frente Estacion,
20170 Usurbi (Guipuzcoa), Spain
P.O.Box 406, 20080 San Sebastian
Telephone: + 34 (0) 943 36 16 40
Telefax: + 34 (0) 943 37 26 41
E-mail: istz0303@tsai.es

Levantina Inds. Asociades, S.A. (imports blocks)
Address: Carretera de la Estacion,
03660 Novelda (Alicante), Spain
Telephone: + 34 (0) 965 60 03 12
Telefax: + 34 (0) 965 60 58 81
E-mail: levantina@lia.es
Internet: www.lia.es

Marmoles del Baztan, S.A. (imports blocks)
Address: 31720 Oronoz-Mugaire,
Navarra, Spain
Telephone: + 34 (0) 948 59 20 47
Telefax: + 34 (0) 948 45 23 83
E-mail: mbaztan@lander.es
Internet: export.navarra.net/paghtml/marba.htm

Marmorex (imports blocks)
Address: C/Ancha, 11,
03668 Alguena (Alicante), Spain
Telephone: + 34 (0) 965 47 65 20
Telefax: + 34 (0) 981 98 65 43
E-mail: savenije@mx4.redasib.es
Internet: export.navarra.net/paghtml/marba.htm

M.C. Kust, S.L.
Address: Montenegre, 538,
17411 Vidreres (Girona), Spain
Telephone/fax: + 34 (0) 972 85 13 80
E-mail: mck@wanadoo.es

Pontevex, S.L. (imports blocks)
Address: Arquitecto Perez Bellas, 7-1˚b,
36211 VIGO, Spain
Telephone: + 34 (0) 986 203 812
Telefax: + 34 (0) 986 203 932
E-mail: pontevex@la-red.com
Internet: www.la-red.com/pontevex/espanol/

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APPENDIX 11 REFERENCES

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APPENDIX 12 COUNTRIES FALLING UNDER THE GROUPS MENTIONED IN SECTION 1.2 OF THE EU STRATEGIC MARKETING GUIDE "NATURAL STONE AND NATURAL STONE PRODUCTS"

SPGA
Afghanistan, Angola, Bangladesh, Burkina Faso, Burundi, Benin, Bhutan, Congo, Central African Republic, Cape Verde, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Equatorial Guinea, Guinea-Bissau, Haiti, Cambodia, Kiribati, Comoros (excl. Mayotte), Laos, Liberia, Lesotho, Madagascar, Mali, Myanmar, Mauritania, Maldives, Malawi, Mozambique, Niger, Nepal, Rwanda, Salomon Islands, Sudan, Sierra Leone, Somalia, Sao Tomé & Principe, Chad, Togo, Tuvalu, Tanzania, Uganda, Vanuatu, Samoa, Yemen, Zambia.

SPGE
Bolivia, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Peru, El Salvador, Venezuela

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Manuals on subjects such as, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the AccessGuide database on European non-tariff trade barriers;
- CBI' s Trade Documentation Centre offering demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI's computerized exporters' and importers' databases, containing regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export development programmes (EDP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

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