Resumen nº 122 bloque A

The Brazilian Ceramic Industry: New Bases of Competitiveness in the Global Market

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Key words: Brazilian ceramic, competitiveness, cluster, raw material

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The ceramic industry, like other sectors of the Brazilian economy, have been in last years a trend of regionalization of its production, looking for emergent markets and new bases of competitiveness. This dynamic must lead to an expansion of the industrial base and a new geographic configuration of the Brazilian ceramic sector, that already shows the development of new industrial clusters.

Following the evolution of this industry it occurs reorganization of other segments of the productive chain of the ceramic sector, with the implantation of new projects, as the case of the natural and synthetic raw material suppliers.

The most dynamic ceramic sector has been the one of Tiles, in spite of other industries as of Sanitary Wares and Structural Ceramics are also passing for important changes, involving the incorporation of new technologies and increase of their production.

In this context, this work analyzes with more detail the Brazilian tiles industry, characterizing its current market structure and, from the projection of future scenes, is tries to identify chances and the main challenges for its development in sustainable bases.

Brazil is fourth world-wide and exporting producer and the occident greatest consuming ceramic tiles. The sector has been presenting significant taxes of growth, having its production increased in 90% in last 10 years.

Concerning the product innovations, it has had a significant expansion of porcelainstone tile, with the entrance of new industrial units in several states. For the other Brazilian traditional products the expectation is of continuity of the expansion of the production, anchored in the domestic market, although in taxes of growth less expressive than in the passed decade, as also in the international market. Additionally, extruded tiles (cotto type) also come increasing the portfolio of national products.

The great challenge passes to be the largest value aggregated to the Brazilian products in the international market. Thus, it is necessary investments in the following areas: mineral raw materials supply improvement of the quality, mining organization, better control and environment recovery of the enterprises, as well as continuous improvement of the tile quality of the dry route, development of national design and consolidation of Brazilian brand in the international market.

Concerning the mineral business, comparative advantages, as the dimension of the domestic market and the mineral geodiversity, had already attracted the interest of internationals companies, mainly Europeans, specialized in industrial mineral production.

Notable aspect is the evolution of the geographic configuration of the Brazilian industrial base. The end of the last century was marked by the concentration of the production in the regions South and Southeastern. Recent movements of the productive sector have evidenced the trend of the development of new cluster in the Northeast Region, counting also with installations of new plants in the Center-West Region.

This dynamic of the sector of ceramic manufacture must generate important chances for other links of the productive chain, being able to generate new investments in the mining, and in the supply of raw materials, complement products and related services.