



EXPORT/IMPORT DATA OF THE SPANISH NATURAL STONE SECTOR 2021

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Despite the global pandemic and the uncertainty generated by it since its beginning, the Spanish natural stone sector has shown some improvement compared to 2020, increasing exports by 12% in 2021.

In the world context of recent decades, with increasingly globalized economic relations, the reduction in transport costs and the implementation of new information and communication technologies have meant an increase in trade for the natural stone sector abroad and the opportunity to enter new markets, as well as increased competition in domestic markets.

Being the most important, foreign trade is not the only manifestation of internationalization, since it encompasses any link between companies and foreign markets.

In addition to the traditional export, there are new internationalizing behaviors that must be reviewed. Without being exhaustive, the following stand out:

- **Offshoring in** all its variants. More and more Spanish companies join the relocation of all or part of the production process, create subsidiaries in other countries, etc. In many cases this expansion includes the exploitation of quarries beyond our borders.

- **Re-exports and re-imports** to take advantage of tariff advantages over certain areas are significant in the natural stone industry.

The foreign trade balance of natural stone in Spain is clearly favorable at €749 million. Until 2020 there had been a drop in both exports and imports, in the context of the global crisis exacerbated by the COVID19 pandemic. But this year 2021, it has improved by 9.48% compared to 2020. The data for 2021 is as follows:

EXPORT 2021 (THOUSANDS OF €)	IMPORT 2021 (THOUSANDS OF €)	TRADE BALANCE (THOUSANDS OF €)
915.271,14	166.212,82	749.058,32

Table 5: Trade balance of the natural stone sector (2021). Source: ICEX (ESTACOM)

In the following table we can clearly see the trend of the trade balance in recent years, showing an improvement in both exports and imports in 2021 of 12.07% and 25.42% respectively.

	2016	2017	2018	2019	2020	2021	2021/20
Exportación	919.231	885.090	848.384	828.573	816.727	915.271	12,07%
Importación	173.660	183.019	180.829	177.113	132.526	166.213	25,42%
Balanza Comercial	745.571	702.071	667.555	651.460	684.201	749.058	9,48%

Table 6: Evolution of the Trade Balance of the Natural Stone Sector (2016-2021). Source: ICEX (ESTACOM)

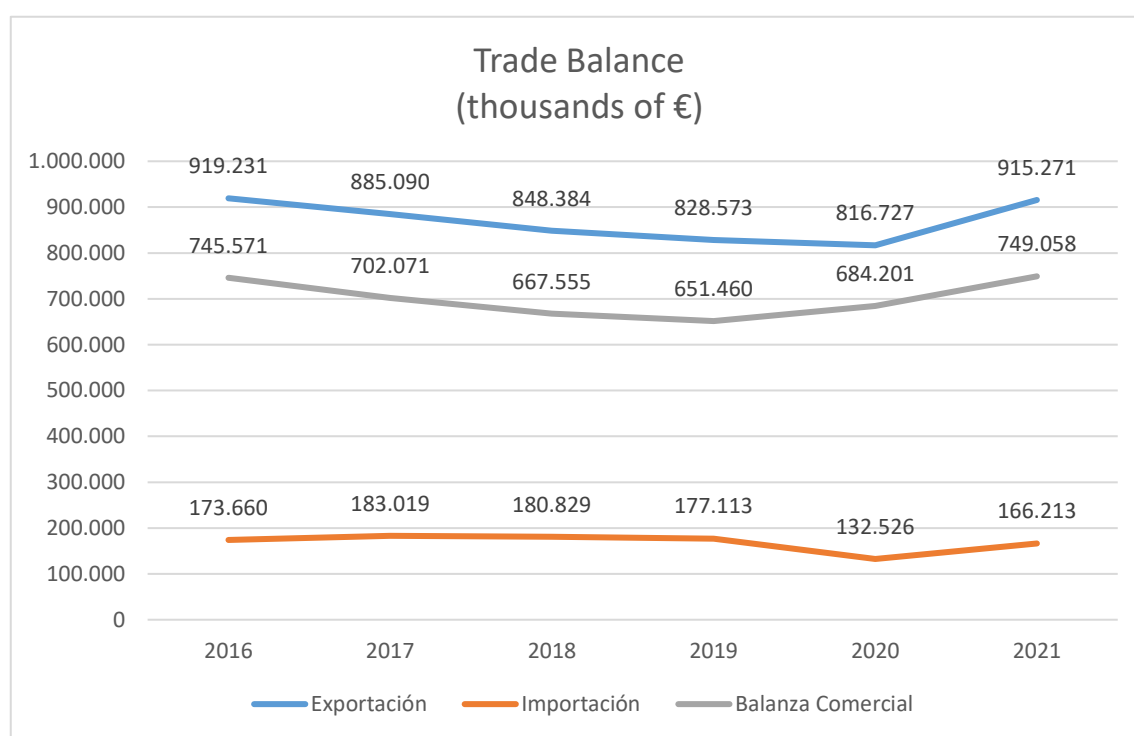


Figure 4: Evolution Trade balance 2016-2021 of natural stone. Source: ICEX (ESTACOM).

Regarding the main trends in the Spanish market, the sector's production in 2021 reached 1,700 million euros, that is, an increase of 6.25% compared to 2020.

Exports in 2021 stood at 915 million euros, an increase of 12.07% compared to 2020. It should be noted that the main importing countries of Spanish stone have been France, the United Kingdom, the USA and Germany with 200, 142, 78 and 61 million euros respectively.

Of the €915 million of exports, €256 million corresponded to raw material, 4.92% more than in 2020, and €658 million to semi-finished or processed material, 25.24% more than with compared to 2020. In the following table and graph you can see the evolution of exports by CNAE in millions of €.

NATURAL STONE EXPORTS BY CNAE 2021 (MILLIONS OF EUROS)				
CNAE	2019	2020	2021	2021/20
2370 -- Cutting, carving and finishing the stone	582	571	658	15,24%
0811 -- Extraction of ornamental stone and for construction, limestone, plaster, crete and slate	246	244	256	4,92%
Total	828	815	914	12,15%

Table 7: Natural stone exports by CNAE. Source: ICEX (ESTACOM).

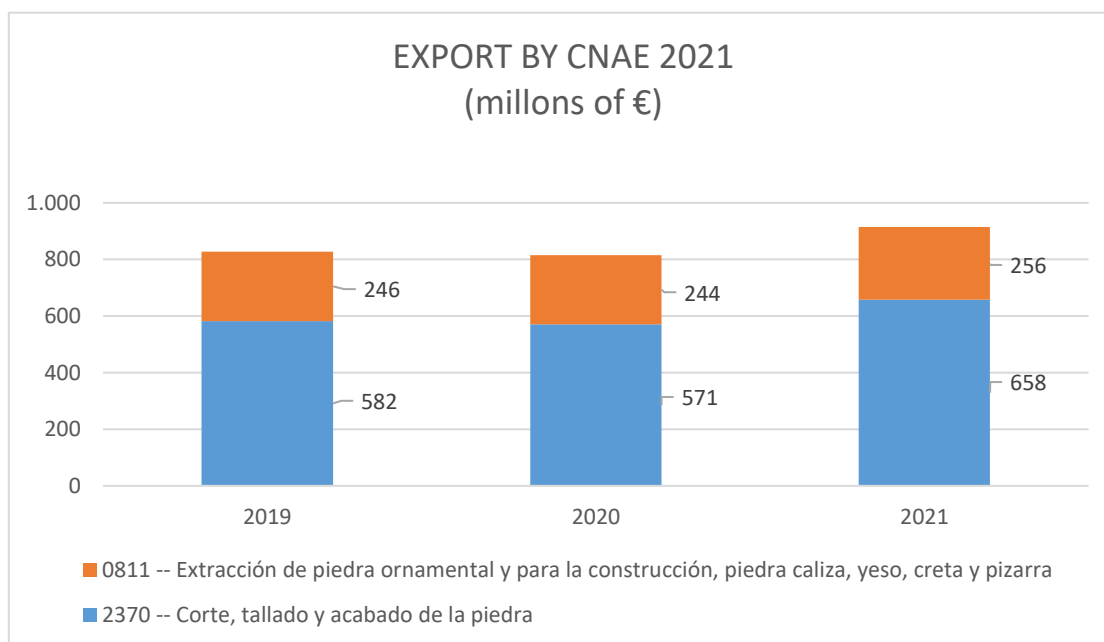


Figure 5: Natural stone exports by CNAE. Source: ICEX (ESTACOM).

Regarding exports by provinces, Ourense heads the ranking, followed by Pontevedra, Alicante, Almería and León.

NATURAL STONE EXPORT RANKING BY PROVINCES IN 2019, 2020 Y 2021 (miles de €)				
Province	Ranking	2021	2020	2019
OURENSE	1	206.456,10	196.246,06	192.239,11
PONTEVEDRA	2	139.697,19	125.060,42	123.952,16
ALICANTE	3	128.806,06	126.897,35	164.263,87
ALMERIA	4	98.019,66	88.571,14	76.876,06
LEON	5	88.038,76	70.723,11	65.179,06
BARCELONA	6	38.146,86	12.551,72	16.038,97
MADRID	7	30.746,88	32.470,25	24.913,17
CASTELLÓN	8	27.248,95	26.179,10	26.502,77
VALENCIA	9	24.205,94	22.893,37	22.733,29
MURCIA	10	23.792,98	22.161,71	24.647,20
CANTABRIA	11	16.926,70	11.931,04	5.731,48
BADAJOS	12	12.674,36	9.817,64	11.669,38
GIRONA	13	10.329,07	8.170,36	7.647,40
LUGO	14	7.946,86	7.687,68	8.962,08
TARRAGONA	15	5.747,65	4.860,12	6.579,83
MALAGA	16	5.513,23	7.476,94	5.843,86
A CORUÑA	17	5.254,50	5.399,46	4.897,57
ZAMORA	18	4.852,90	2.956,76	2.692,84
BURGOS	19	3.989,43	4.109,54	4.035,11
SEVILLA	20	3.911,73	2.233,78	2.899,13
SubTotal	0	882.305,83	788.397,54	798.304,35
Total	0	915.271,14	816.727,20	828.573,46

Table 8: Natural stone export ranking by province in 2019, 2020 and 2021. Source: ICEX (ESTACOM)

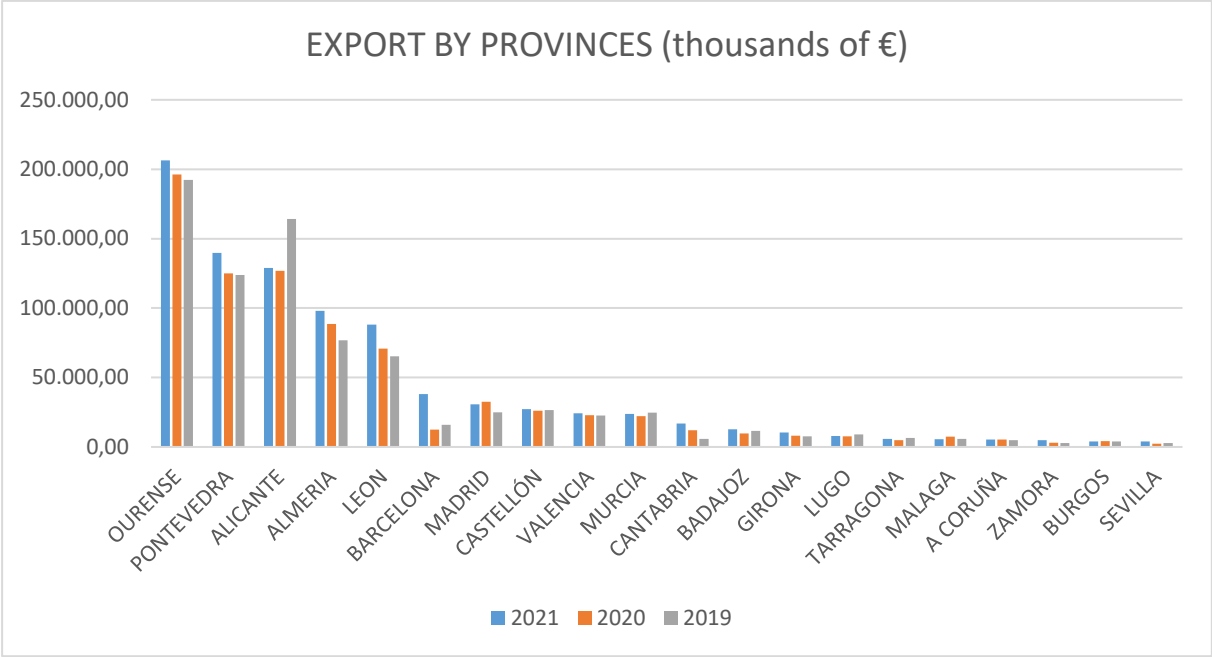


Figure 6: Natural stone export ranking by provinces in 2019, 2020 and 2021. Source: ICEX (ESTACOM)

Another piece of information to highlight is the destination of natural stone exports by country, with France being the first country in the ranking, followed by the United Kingdom and the United States. This year there has been a considerable increase in exports. In more than 12%. Yet another year there is evidence of a drop in exports to China, which decrease by 65.2% compared to 2017. Although it is Turkey that has decreased the most. 47.7% compared to the previous year. Also Qatar and Saudi Arabia have suffered a decline in exports. The following table and graph show this export.

NATURAL STONE EXPORTS BY COUNTRY (THOUSANDS OF €)					
Contries	2019	2020	2021	%total 2021	2020/19
France	179.634,66	168.019,43	200.661,42	21,92%	19,4%
United Kingdom	116.946,25	122.445,13	142.333,73	15,55%	16,2%
USA	73.772,78	68.745,07	78.109,46	8,53%	13,6%
Germany	47.709,83	59.224,40	61.756,20	6,75%	4,3%
China	32.186,23	24.742,40	22.573,34	2,47%	-8,8%
Portugal	37.223,19	37.687,15	40.599,50	4,44%	7,7%
Morocco	31.534,55	29.774,34	40.901,96	4,47%	37,4%
Saudi Arabia	25.321,36	26.897,75	24.634,43	2,69%	-8,4%
Belgium	24.426,73	28.732,43	35.796,22	3,91%	24,6%
UAE	12.825,23	8.969,21	9.107,11	1,00%	1,5%
Qatar	14.955,73	10.452,96	7.644,96	0,84%	-26,9%
Algeria	13.346,55	13.196,92	13.393,09	1,46%	1,5%
Mexico	11.496,36	9.007,47	10.764,18	1,18%	19,5%
Brazil	11.707,77	9.653,83	10.263,95	1,12%	6,3%
Ireland	11.506,35	11.468,84	13.580,52	1,48%	18,4%
Turkey	7.466,02	13.416,73	7.013,57	0,77%	-47,7%
Italy	9.503,35	10.012,27	9.992,23	1,09%	-0,2%
Colombia	10.984,22	7.720,33	9.693,97	1,06%	25,6%
Netherlands	6.420,72	12.511,48	13.536,53	1,48%	8,2%
Russia	6.816,35	10.530,25	10.363,55	1,13%	-1,6%
Rest of the world	142.789,25	133.518,82	152.551,21	16,67%	14,3%
Total paises	828.573,46	816.727,20	915.271,14	100,00%	12,1%

Table 9: Ranking of export of Spanish natural stone by destination countries during 2019,2020 and 2021. Source: ICEX (ESTACOM)

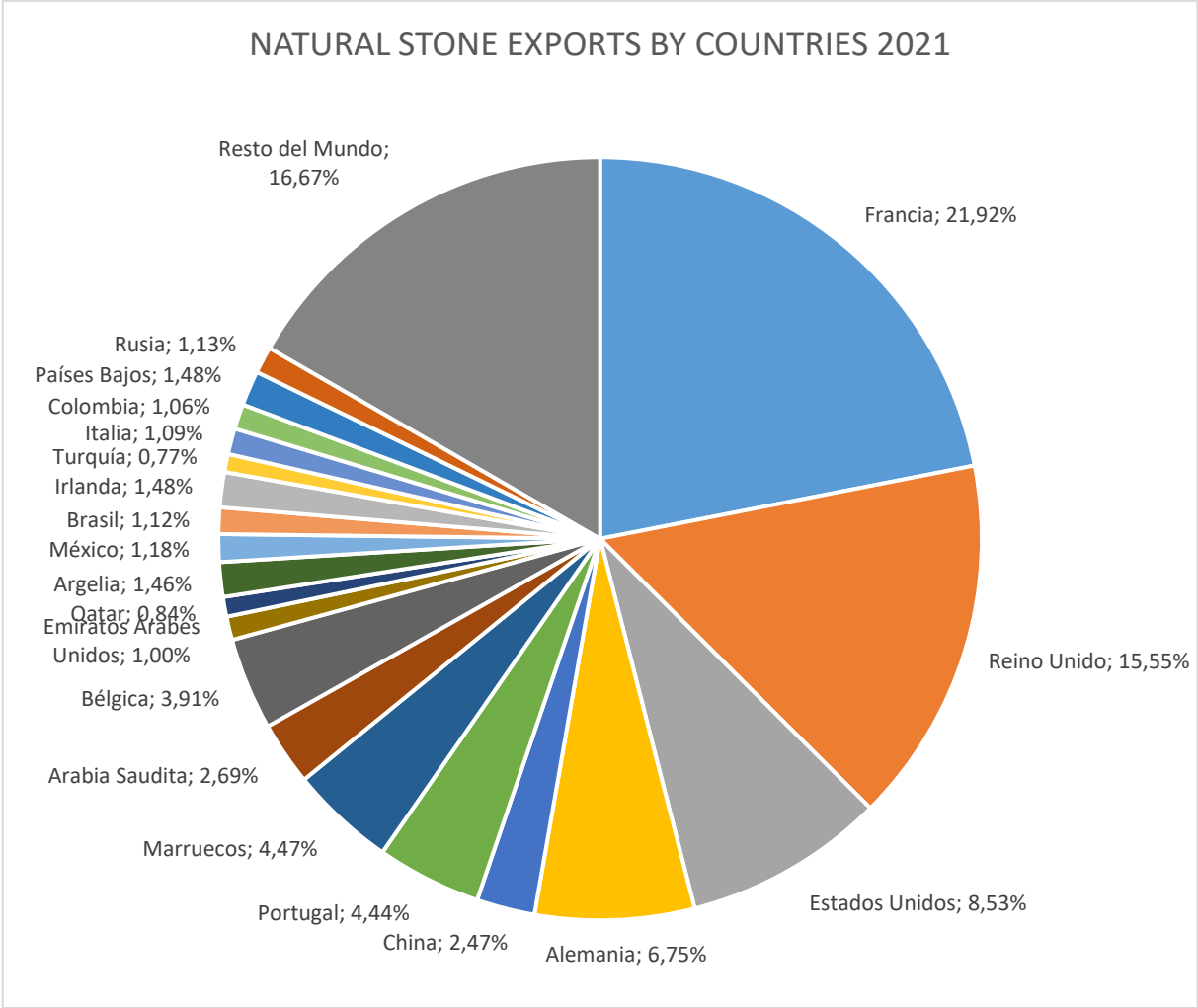


Figure 7: Ranking of countries destination for Spanish natural stone exports at 2021. Source: ICEX (ESTACOM)

On the other hand, the number of imports has increased considerably in 2021 compared to 2020. In total, an increase of 25.76%. More important in the import of blocks with an increase of 36.23%. The following table and graph show this trend..

NATURAL STONE IMPORTS BY CNAE (millions of €)				
CNAE	2019	2020	2021	2021/20
2370 -- Cutting, carving and finishing the stone	78	69	94	36,23%
0811 -- Extraction of ornamental stone and for construction, limestone, plaster, crete and slate	99	63	72	14,29%
TOTAL	177	132	166	25,76%

Table 10: Imports of natural stone by CNAE. Source: ICEX (ESTACOM)

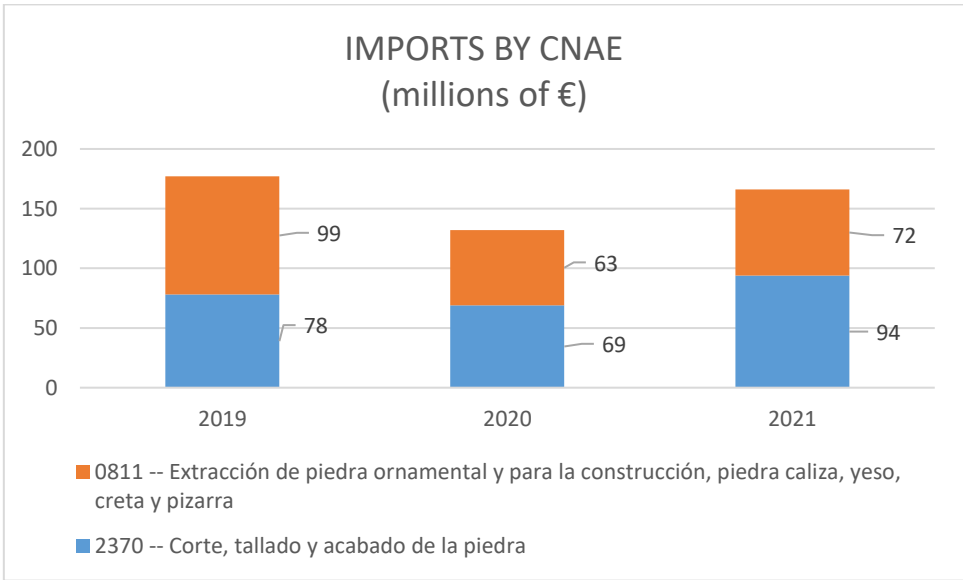


Figure 8: Evolution of natural stone imports by CNAE. Source: ICEX (ESTACOM)

As for imports of natural stone by countries of origin, Portugal continues to maintain the first place, followed by China and India.

SPANISH IMPORTS OF NATURAL STONE BY COUNTRY (THOUSANDS OF EUROS).				
Countries	2018	2019	2020	2021
Portugal	21.443,31	26.888,97	23.633,96	28.175,91
China	19.764,73	18.459,73	14.607,84	18.493,39
India	17.115,44	17.049,01	14.115,65	18.544,50
Italy	14.442,94	13.937,48	11.525,36	17.993,52
France	18.638,14	17.532,29	5.865,28	7.733,57
Brazil	11.508,26	9.976,50	11.786,67	16.192,65
Turkey	9.923,92	9.774,13	8.177,71	11.324,63
Mozambique	7.903,34	8.515,61	7.651,92	3.843,94
Norway	5.018,46	3.572,51	4.677,01	5.301,46
angola	3.910,57	4.326,69	4.422,87	6.671,80
Swiss	9.622,49	1.771,67	91,69	11,31
South Africa	4.408,91	3.840,21	3.368,79	4.608,02
Germany	5.157,77	6.441,33	1.788,72	1.796,30
Netherlands	3.800,33	5.168,62	1.968,77	2.133,82
Zimbabwe	2.412,48	2.034,15	2.625,86	5.969,07
Indonesia	1.861,25	2.547,35	2.429,73	3.380,61
United Kingdom	2.803,84	2.818,15	817,01	711,74
Sweden	2.324,48	6.280,30	599,93	368,28
Greece	2.909,09	2.176,79	1.819,19	820,99
Egypt	2.083,69	2.466,01	1.633,40	1.928,71
Rest of the world	13.775,22	11.535,92	8.918,68	10.208,59
Total countries	180.828,65	177.113,40	132.526,06	166.212,82

Table 11: Spanish imports of natural stone by country (thousands of euros). Source: ICEX (ESTACOM)

And finally, Pontevedra continues to be the province that imports the most natural stone. Although if we analyze these imports by CNAE, we see that Almería, Alicante and Valencia are the provinces that import the most manufactured natural stone with €14.0, 12.1 and 11.3 million respectively. While Pontevedra and Alicante are the ones that import the most raw natural stone with €45.7 and €7.1 million, respectively..

SPANISH IMPORTS OF NATURAL STONE BY PROVINCES (THOUSANDS OF EUROS).				
Province	Ranking	2021	2020	2019
PONTEVEDRA	1	51.929,35	43.721,15	40.573,96
ALICANTE	2	19.206,52	13.476,81	18.542,12
ALMERIA	3	16.574,95	11.344,66	11.222,77
VALENCIA	4	13.850,76	9.172,44	12.091,97
CASTELLÓN	5	11.839,94	9.508,69	10.158,16
MADRID	6	11.440,71	10.021,20	11.055,95
BARCELONA	7	7.925,29	7.333,18	40.441,59
LEON	8	6.003,63	3.351,94	4.567,57
SANTA CRUZ DE TENERIFE	9	2.839,20	2.718,58	4.159,53
MURCIA	10	2.634,12	1.665,60	1.794,75
ZARAGOZA	11	2.556,83	1.568,73	1.467,23
MALAGA	12	2.100,99	1.961,65	1.363,45
OURENSE	13	1.933,26	1.006,37	984,17
SIN IDENTIFICAR	14	1.825,41	2.024,76	2.146,87
ILLES BALEARS	15	1.768,77	2.404,74	2.487,38
TOLEDO	16	1.178,14	1.453,58	1.518,67
SEVILLA	17	968,35	1.157,16	918,92
A CORUÑA	18	945,01	783,06	826,37
LAS PALMAS	19	843,96	773,66	1.920,29
LUGO	20	766,41	657,01	1.405,24
SubTotal	0	159.131,61	126.104,98	169.646,95
Total	0	166.212,82	132.526,06	177.113,40

Table 12: Spanish imports of natural stone by provinces (thousands of euros). Source: ICEX (ESTACOM)

TRADE DEFINATIONS AND CODES

Under the name of natural stone or ornamental rock are those rocks that, once extracted and after a production process, are suitable to be used as noble building materials, elements of ornamentation, funerary or sculptural art and varied artistic objects, retaining in full their composition, texture and physical-chemical properties.

The sector referred to in this Sector Report is identified by the following codes:

- CNAE (Class 2009):

0811 "Ornamental stone extraction and for construction"

2370 "Cutting, carving and finishing the stone"

As it is beyond the scope of this study, a comprehensive classification or characterization of natural stone types shall not be included here. On the contrary, the usual terminology will be used in the market, which has lost its geological and petrographic rigor, but which greatly simplifies denominations.

Natural stone is therefore commercially classified into three generic groups: marbles, granites and slates. Its economic interest lies in characteristics as varied as its showiness, physical-mechanical properties and aptitude for polishing.

The rules in use set out the different trade definitions, namely those cited in UNE12670 Piedra Natural. Terminology:

Marble (A 12670-2.1.243)

"Compact natural stone that supports polishing, used in decoration and construction, composed mainly of minerals with hardness between 3 and 4 on the Mohs scale (such as calcite, dolomite and serpentine), for example, marbles according to scientific classification and cylindrical marbles, as well as the following natural stones, provided that they allow mirror polishing: limestone, marbles, dolomites, travertine limestone gypsandstreamers."

Granite (A 12670-2.1.156)

"Compact natural stone that supports polishing, used in decoration and construction consisting mainly of minerals with a hardness between 5 and 7 on the Mohs scales, such as quartz and feldspato, e.g. granite according to scientific definition, other plutonic rocks, volcanic rocks with porphyritic structure, metamorphic rocks with mineralogical composition similar to granitoids such as gneis and even limestone in some regions of Europe."

Slate (A 12670-2.1.389)

"Rocks that are easily laxable in thin sheets along the foliation plane resulting from a flow shalese, caused by low or very low degree metamorphism due to tectonic compression. They differ from sedimentary lax lutites in that they always open by the stratificationplane."

Sandstone (UNE 12670-2.1.362)

"Sedimentary rock composed of quartz grains, feldsal, mica and small fragments of older rocks (...) it is a natural stone as indicated by the scientific definition of sandstone with a cement that can be silicated, calcite, clay minerals or iron oxides."

Alabaster (UNE 12670-2.1.6)

"Compact and fine grain variety of plaster usually white or pastel and translucent".

Basalt (UNE 12670-2.1.37)

"Volcanic rock composed essentially of plagioclase (labradorite-anorite) and pyroxene and has a fine to dense grain texture (...). Basalt is a natural rock as indicated by the scientific definition of basalt and other rocks such as basalt, picrites, diabases, dolerites and microgabros."

As regards the system of classification of natural stone goods subject to international trade, it has the following tariff headings for import/export operations:

TARIFF CODE	description
RAW MARBLE	
25.15.11.00	Marble and travertine, of apparent density greater than or equal to 2.5, even devastated or simply chopped by sawing or otherwise, raw or devastated.
25.15.12.20	Marble and travertine, simply chopped by sawing or otherwise, in blocks or in square or rectangular plates, thickness equal to or less than 4 cm.
25.15.12.50	Marble and travertine, simply chopped by sawing or otherwise, in blocks or in square or rectangular plates, thickness greater than 4 cm., but equal to or less than 25 cm.
25.15.12.90	Marble and travertine, simply chopped by sawing or otherwise, in blocks or in square or rectangular plates, thickness greater than 25 cm.
25.15.20.00	"Ecaussines" and other limestones of carving or construction, of apparent density greater than or equal to 2.5, and alabaster, even devastated or simply chopped by sawing or otherwise, in blocks or in square or rectangular plates.
25.16.21.00	Rough or devastated sandstone.
25.16.22.00	Sandstone, simply chopped, sawn or otherwise, in block or on square or rectangular plates.
25.16.90.00	The other carving or construction stones, simply chopped, sawn or otherwise, in block or in square or rectangular plates, not more than 25 cm thick.
25.17.41.00	Granules, tasquiles and stone dust of headings 2515 or 2516, even heat treated, of marble.
ELABORATE MARBLE	
68.02.10.00	Tiles, cubes, dice and similar items, in any way in which the larger surface can be inscribed in a square side less than 7 cm., granules, tasquiles and dust, artificially colored.
68.02.21.00	Marble, travertine, alabaster and its manufactures simply carved or sawn, with flat or smooth surface.
68.02.22.00	The other limestones and their manufactures simply carved or sawn, with flat or smooth surface.
68.02.29.00	Stones of carving or construction simply carved or sawn, with flat or smooth surface (except limestone and granite).
68.02.91.10	Polished alabaster, decorated or otherwise worked, but unculpured.
68.02.91.90	Marble and travertine worked otherwise, and hand-sculpted alabaster.
68.02.92.10	The other polished limestones, decorated or otherwise worked, but unculpured.
68.02.92.90	The other limestones worked otherwise or sculpted by hand.
68.02.99.90	Stone of carving or construction (except slates, limestones and granite) worked and its manufactures (except polished, decorated or otherwise worked, unculpured, net weight or equal to or greater than 10 kg; simply carved or sawn, with flat or smooth surface; on tiles, cubes or the like, in which the larger surface can be inscribed in a square side less than 7cm , granules, taquiles and artificially colored powders)

RAW GRANITE

- 25.16.11.00 Raw or devastated granite.
- 25.16.12.10 Granite, even simply chopped by sawing or otherwise, in blocks or on square or rectangular plates, thickness equal to or less than 25cm.
- 25.16.12.90 Granite, even simply chopped by sawing or otherwise, in blocks or on square or rectangular plates (except thickness equal to or less than 25 cm.).

ELABORATE GRANITE

- 68.01.00.00 Cobblestones, tapered and slates for pavement, natural stone (except slate).
- 68.02.23.00 Granites in tiles, cubes, dice and similar items,..., tasquiles and powders, artificially colored.
- 68.02.93.10 Polished granite, decorated or otherwise worked, but unculpired, of net weight equal to or greater than 10 Kg.
- 68.02.93.90 The others sculpted by hand.
- 68.02.99.10 Stone of carving or construction (excluding slate, limestone and granite) polished, decorated or otherwise worked, net weight equal to or greater than 10 Kg. (except sculpted or simply carved or sawn, with flat or smooth surface).

RAW SLATE

- 25.14.00.00 Slate, even devastated or simply chopped, sawn or otherwise, into square or rectangular plates.

ELABORATE SLATE

- 68.03.00.10 Natural slate worked and manufactures of natural or agglomerated slate for roofs and facades.
- 68.03.00.90 Natural slate worked and manufactures of natural or agglomerated slate (except for roofs and facades).