

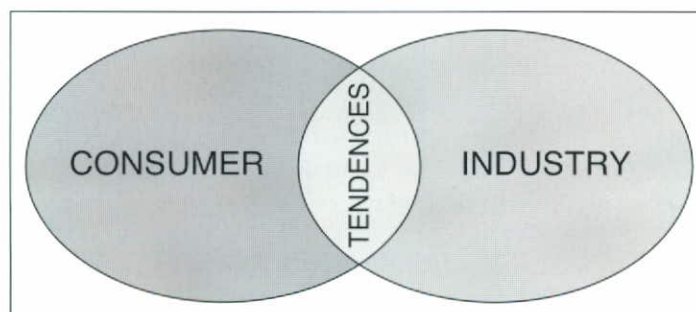
TRENDS IN THE CERAMIC FLOOR AND WALL TILE SECTOR

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The objective of the following trend analysis is to sketch the latest ceramic tile product scenario. The analysis is based on aesthetic trends which determine the technical and formal characteristics of the products on the market. By concentrating only on the most important aspects, leaving spectacular transitory phenomena to one side, we should be able to come to a conclusion which will guide us to future trends in the ceramic industry.

First a model will be analysed, based on an intersection diagram in which the trends are set. On one side of the diagram, we shall lay out all elements which represent the consumer's current functional and sensorial needs. On the other side, we shall place the technical and formal investigations of the ceramic industry. Establishing a dialogue between both sides, we will be able to set the current ceramic language in the centre. All needs that have not been covered and all potential ones that may become useful in the future will be left to either side.



We must note that this study has been restricted to our immediate surroundings, that is, to the western consumer, not only because we belong to this culture but also because Western countries radiate a new cultural and economic "colonisation" over others. This "colonisation" is formulated through the "global village" theory which exports technical knowledge, economic formulas, social behaviours and cultural archetypes reinforced by the media.

If we were to eliminate the aspects that define our society, together with present day consumer's needs and attitudes, we could easily end up simplifying and generalising the panorama. Fragmentation and complexity are constant in current sociology analysis. However, it is our to try and avoid these problems with the help of studies that other analysts and specialised centres have disseminated, and we shall accept this risk as a starting point for us to work from and set up the discussion.

We are approaching the end of a decade that started with the triumph of capitalism over a Socialist utopia. As there is no alternative model for this system to compete with, this could lead to a dangerous monopoly situation, which obeys laws of its own. Political debate nowadays is set at two very close positions, a moderate socialism and a progressive liberalism, although their programmes and strategies seem quite different. This situation creates an attitude of scepticism and a lack of trust in political programmes at the same time as it encourages people to search for solutions through individual actions organised in extra-governmental groups, convinced that we should not hide behind a protecting State and innocently ignore our responsibilities.

Meanwhile, the contradictions and inequality of our cultural model prevail. The ideologies that confront capitalism advocate solidarity and ecological values but from the same system, due to a lack of alternative ones. Nationalist ambitions and national and supranational alliances coexist in a geopolitical field. This situation is resolved in a difficult balance that needs to be continually readjusted. A balance in which complexity is seen as a minor evil, and which admits a large variety of behaviours that should be respected and incorporated into the system.

Political and economic agreements between nations, increasing usage of computers and a continuous advance in communications have led to the concept of a free market, subject to its own law and with serious contradictions in debate whilst the needs of weaker markets are ignored. Western societies live in luxury and most people have everything in excess. However, the system is self-maintained by ever-increasing demand.

Markets are saturated by a growing supply and demand that has become more and more difficult to understand. Once the western consumer's basic needs are fulfilled, that is home, TV, refrigerator, car, as well as emotional needs such as fashion and style, we enter a phase in which we need to attract the consumer's attention with more ambitious proposals. This period, called "Mayeutic" by F. Morace, is supposed to involve products that should be able to stimulate the consumer by evoking new interpretations of his environment. This is the focus of present market investigations: "(...) the new aim of marketing will no longer be to give the consumer what he wants but suggest what he might want if he could only imagine it"^[1].

The nuclear family has become the basic social unit. Couples have endowed themselves with autoregulatory mechanisms such as introducing women into the workforce, divorce, homosexual marriages, co-habiting couples. On the other hand, the increase in communication between parents and children has led to children living in the

[1]. MORACE, F., *Contratendencias. Una nueva cultura del consumo*, Experimenta; Ediciones de diseño; Celeste ediciones, Madrid 1993, pág. 156.

parental home for longer, a phenomenon which is intrinsically linked to the current unemployment problem.

The appraisal of new generations as a future investment in society and an increase in the comprehension of the psycho-evolutionary process has led to an ever-increasing protection over children, a greater tolerance towards teenage behaviour and more respect towards youth. At the same time, the progressive ageing of the more developed societies makes us question the role that senior citizens play in society. However, the changes caused by progress in science threaten this stability. Genetic engineering and new methods of artificial insemination make it necessary for us to create moral and legal alternatives in order to incorporate these into our society (surrogate mothers capable of gestating two embryos from different partners, genetic manipulation).

The revolution in computers is leading to new working systems such as tele-work which implies important changes that will affect our social behaviour and our habitat needs, as has already happened in the fashion sector, as we shall see further on. In the meantime, unemployment is one of the main imbalances and contradictions of our society. For some, an excess of work is causing family and health problems, whereas for others, lack of work is leading to marginality. Unemployment has aggravated to such an extent that it is considered a solution to another current problem of our time, that is migration tides.

Immigration has become a contradiction of daily life. While charity groups and solidarity programmes for the Third World are demanding 0.7 of the GNP for support programmes, and our cultural panorama is becoming richer, in the social area racial confrontations and ethnic neurosis are worsening.

Cultural debate is thriving, we live in an information society, in which quantity often has priority over quality, we have access to the Internet, to multichannel TV, to publications from all over the world but we still have to learn so much. We want to communicate with each other, but we are afraid to open ourselves up and are unsure of what we want to say.

Historical avant-garde utopias have failed in their efforts to change the world and the modern avant-gardes are rapidly absorbed by a system of alternative proposals. We are witnessing the appearance of what Andrea Branzi calls "*the permanent vans*" "(...) to produce evolutionary scenarios, reformist models of development, to be offered to saturated markets, to advanced technology industries in a design crisis, oxygen-indebted to the hyper performance supply of new electronic devices, faced with a market demand that expects everything and the opposite of everything (...) "[2].

Cultural stimuli are advancing at such a rhythm and in such proportions that it is hard to keep pace with them, in the context of an offer that includes its own refusal and the recuperation of spiritual and ecological values from the past along with the discovery of other cultures. An advanced communications system, an interest in travelling and migration have favoured this exchange of cultural values, the growth of agnosticism, the feeling of loneliness even within a large group of people have given place to the emergence of mystical attitudes, the reappearance of

[2]. BRANZI, A., *From Historical Avant-gardes to permanent Avant-gardes*, Domus, Milan, no. 783, June 1996, pag. 4

fundamentalist movements and above all, an ever increasing interest in oriental spirituality. The unstoppable advances in science have caused two different reactions in society, astonishment and refusal. Everything is being changed by the use of computers, from work relationships, working tools, communications, sensorial perceptions, management, production, creation, teaching, to the coordinates of time and space.

The media is preparing us for a new era, although the rhythm it has imposed is hard to follow. Therefore, we don't want to let go of tradition and the signs we are already familiar with, of the codes we can understand, we want to continue preserving our values, ways, styles, to conserve our heritage in a succession of revivals which comfort us when we are faced with the feeling of continuous change and the impossibility of keeping the future at a distance.

The future is catching up with us and although many science-fiction prophecies have come true, reality is often better. We have the leisure business opposed to the leisure society, standard production opposed to automated craftwork, the mutant man opposed to the super man, the ecological attitude opposed to the artificial environment, localism opposed to uniformity, the difficult rehabilitation of Eastern countries opposed to the nuclear hecatomb, the stimulus of diversity opposed to social equality, creative intelligence opposed to curricular intelligence.

We need a more permissible and permeable world, in which very different ideas can cohabitate, such as hypermarkets and telesales together with the small business man, ecological austerity with diversified consumption, agnosticism along with spirituality, tradition with innovation. A cohabitation not only between two different people but also within oneself, sometimes even during the same day. That is to say, we are moving away from coherent, steady models which could be placed in the context of the consumer's attitude, in order to confront different and contradictory positions. The individual, blurred among the human mass, and controlled by the media, struggles to stand out, disillusioned with his role in social projects, trying to fight for his own destiny.

As a result, we are faced with an open creative market, a society subject to great competitiveness conscious of change which maintains close links with the past and a consumer with no immediate needs, who is aware of environmental problems but eager for suggestions and stimulation which will allow him to satisfy his desire to consume and develop his personality in order to stand out from the crowd. A personality that is subject to any economical or cultural part of society, as much as to his personal adaptation of the surroundings. A consumer that is more conscious of the role he has to play, and with greater knowledge that makes him demand and appreciate the quality of a product. A quality that does not only depend on technology but also on social and cultural intelligence.

From a quantity perspective, a company must be prepared to develop products on a world-wide scale, which have a function, a lifestyle, a production system, a form of distribution and a communication project. Our perception of an object is not only based on its physical dimension but also on the narrative skills used in its publicity, packaging and distribution. In an environment where we can get very similar products at different price levels but with a homogeneous supply source, we need advantages that will differentiate our products from other companies. These advantages should come in the form of ideas and suggestions

that the consumer must interpret and adapt to his own personality. The product should be promoted on a world-wide scale using all possible means that the company has at its disposal.

The consumer's home has changed. Now, it is a place where new activities are happening. Nowadays, it is no longer the place where we just eat, rest, wash and have family and social reunions but also a place where we work, find refuge, rest and relax, a place where we can do all the things that daily work does not allow, such as talking, reading, listening to music, watching TV or meditating. For this reason, today's house is an extension of the personalities of those who live in it, a place where individuals can express themselves and demonstrate their own interpretation of the world and quality of life. Faced with a contradictory and aggressive outside world, our home is a refuge in which we can maintain the harmony, comfort and balance that we need. Therefore, instead of searching for standard solutions, the owner looks for tools to help him create his surroundings and if money and time allow it, he will carefully study the offer and will select whatever suits him best, checking every detail, so that he can develop his personality completely.

This concern for his dwelling place now includes two rooms which until recently have always been ignored, the kitchen and the bathroom. Their important role in the home has become obvious through the publication of magazines that are specialised in these areas and also because architecture, interior design and decoration magazines often dedicate issues to these two rooms due to the fact that both bathrooms and kitchens are becoming larger and more decorative. At the same time, they have increasing functions and are adapting to new social habits. Every year, the kitchen, which is a combination of a machinery room and a medieval home is playing a more important role in daily life. As well as being a storage and cooking room, it also has a dining table, a sitting room and even an office. This new situation determines the need to combine functionality with warmth, comfort and style. On the other hand, bathrooms have become more individual, in an effort to preserve intimacy and relaxation, and nowadays many houses have two or three toilets, the style being adapted in accordance to its owner's needs, couples, children, guests. Again, functional needs must combine with formal and cultural ones.

Before describing the interpretations the ceramic industry has made of these needs through its products, we shall first take a look at other trends from industrial sectors close to ours, that will help us to foresee proposals which when taken up by other markets, have a strong influence on ours. We are referring to the textile world, the fashion world, furniture and interior design which, as we shall see, coincide basically in their studies and offer similar alternatives. In all of them a moderation in their discourse can be observed, which by avoiding radical ideas, values eclecticism and the peaceful cohabitation of conciliatory attitudes.

The sociology and trend research centre in Paris, Promo-Styl has defined the four most important trends in 1997:

1. **CLICHÉS:** it corresponds to the aspiration for a more stylish, bourgeois life. It is based on aristocratic values such as good taste, elegance and good manners. It is aimed towards a wider public and is defined as "democratic luxury". The tendency is defined as the revival of a rigid aesthetic, subject to

the norm, from the 1960's and 1970's. It presents many architectural forms, structured volumes, "V" shaped forms, perfect proportions and a chic minimalism.

2. **PLEASURE:** along with quality, function and price, pleasure has become the fourth element which influences the consumer and stimulates all sectors as well as culture, music, fashion and design. Lifestyle opens up to sensual Latin influences. The trends it gives rise to are warmth, glamour, exuberance and bright colours.
3. **ANTICIPATIONS:** nature no longer dominates. Imagination is fed from a new source of biology. The idea of mutation is in the air and inspires a fashion for mutants and androgens. The future is interpreted by optimism and enthusiasm. Linked to this trend is the opposite one in which the future represents fear and the key word is protection. This tendency is an evolution of high-tech and highlights the minimalist tendency while reviving Op-Art.
4. **MEMORY:** the revivalist style is coming back in force. Products from the past are in fashion. This trend leads to reissues, eclecticism and a fancy for details. Themes are often represented as a story.

F. Morace, Head of the department of sociology research and trends of the Domus Academy in Milan, defines the fashion trends based on convergent social sensibilities, personalisation, style, suave hedonism, harmony, protection and a series of functional needs, such as work, travel, celebrations, seduction, relaxation and sport. Some of the following trends are a continuation from previous years and others have been subdivided into smaller groups, although they are not mentioned here:

1. **SERVI-MOVING:** a clothing tendency which is a mixture of flexible and travelling clothes. They should be resistant, wearable all year around and have many pockets.
2. **DIY-BASIC:** the need for comfort and personalisation blend together in leisure clothing.
3. **MADE-TO-MEASURE:** combines the need to personalise clothes with a taste for tailoring, technique and formal innovations.
4. **APHRODISIAC:** this is a result of a desire to combine seduction and recognition.
5. **SPORT CLOTHING TRIBES:** recognition blends with sport.
6. **FREE-LANCE:** specially for sensitive independent professionals who are sophisticated hedonists.
7. **SECOND SKIN:** seduction mixes with an interest for new materials.
8. **CLASSICAL FOR TRAVELLING:** elegance and appearance have priority over functional and practical aspects.

9. **PSYCHO:** personality and one's own ideas take precedence over the obstacles of both daily and professional life.

10. **ARMOUR AND AGGRESSION:** The need for protection and security makes clothes look severe which gives the impression of armour.

In the furniture and interior design sector, Christopher Pillet presented four trends that were exposed at the Furniture Exhibition of Paris in 1997^[3]:

1. **EASY-LIVING:** this is a tendency that makes up for the lack of space and time and the need to adapt our environment to the continual changes that are taking place by revaluating the functional aspects and softening industrial aesthetics.
2. **MYTHIQUE:** the revaluation of past times is the counterpart in the spiral of innovations.
3. **ARCHETYPE:** this time, the past is seen as a base for a better future, through affective links that allow the present object to be a transporter of innovation.
4. **CHICISM:** the emergence of the desire to have a bourgeois lifestyle, a purchasing power through reference marks, exterior signs of quality, modernisation and Classic.
5. **MINIMUM:** this trend is an alternative to spaces that are overdecorated with signs and decorations. This is a response to the need for space and it appreciates a severe ascetic aesthetics where emptiness is considered a luxury.

At the Paris Fair, Thierry de Beaumont tried to uncover emerging signs of creation and suggested four possible paths:

1. **THE CLARITY ROUTE:** this is an extension of the minimalist tendency that sets out to go further in the essential aspects and add affect and humour to objects. The key words are cleanliness, clarity, design and refinement.
2. **THE HYBRID ROUTE:** random links connected with the past emerge from the combination of materials, forms and signs from different eras.
3. **THE MADE-TO-MEASURE ROUTE:** the industry revives craftwork through unique and original editions.
4. **THE INNOCENCE ROUTE:** as a result of economic hardship, imaginative and childlike aspects are highly esteemed.

Is it possible to establish a link between these trends and those proposed by the international suppliers in the most recent fairs of this sector? Definitely. Our sector is capable of assuaging all those doubts that have arisen through the following work lines:

1. **CLASSICAL:** quality is measured through classical values that the middle class

[3]. LECUONA, M., *STAND BY: los nuevos salones del mueble no arriesgan*, Experimenta no. 15, March 1997, pp. 32-38.

inherited from the social and intellectual aristocracy still recognised today by the consumer who sees himself as the heir and keeper of classical culture and its aesthetic standards such as proportion, rhythm, forms and figure. Luxury and sophistication are synonyms of quality of life and social success and therefore, provide confidence and self-esteem.

2. **HISTORICIST:** the value of technical and formal heritage that each sector generates cannot be ignored by a world eager for innovations, and technology allows us to recapture those which time has converted into essence. By maintaining strong links with the past we strengthen our position with the present, we prepare ourselves for changes because we acknowledge them as part of evolution and development.
3. **NATURAL:** the change from a bucolic and primitive aesthetic to a more urban and natural style helps us face the contradictions between our desire to consume and our need to preserve.
4. **INTENTIONAL:** the future depends on our respect for the past, our preservation of the present and our search for the unknown.

Are these new trends? Not basically, but the nuances have definitely changed. These nuances are caused by the mixture of these four tendencies, the advances made in technology, the need to introduce new techniques and new forms into the market which will help us to define our culture in a moderate discreet and gentle way

The latest technical advances which have favoured this evolution have been the development of alternating screen-printing head systems, which are now more precise and also the development of continuous rotating printing systems, dry glaze applications, intense colours, the gloss and lustre obtained in single-firing, granulars that can be polished, the development of hydraulic and radial cutting machines, the use of machinery from the marble sector such as polishing and lapping machines, the development of CAD-CAM systems which allows us to obtain profiled surfaces and also the development of resins in order to obtain press trial rubber linings. Resins are also necessary for complementary pieces used for the patterns in relief and curved formats which are combined with the ceramics.

Although the latest innovation has been the application of the rotary system to the engobing, glazing and decoration of pieces, its effect has already been seen at recent fairs. A system that can bring important changes in the glazing and decoration is also being studied.

In the field of porcelain flooring tiles, we must highlight the development in the machinery line of heavy tonnage press machines (10.000 and 12.200 t) to obtain large formats which have in turn led to the development of new polishing machines for these formats; movable storage depots, directly fed from spray dryers, which can be moved to the depot or presses, thus allowing a wider flexibility when producing colours and the new fast drawer with accessories for different finishes. In decoration, new soluble stains (yellow, deep green, black) are being developed as well as satin finishes. This technical development is a consequence and condition of the progressive incorporation of this product in medium and large sized companies,

especially in Italy, some of which have opted for changing their whole product range to porcelain tiles.

The appearance of companies that supply spray-dried, coloured bodies and lower quality raw materials which are cheaper have favoured an exponential growth in the production of imitation-porcelain tile. These factories have enabled stoneware companies to produce a fair quality tile, which requires less labour as they are not products for mass polishing or colouring therefore being less expensive. This has helped to develop the porcelain tile pressing machines in order to obtain a porcelain-like tile and supply this new product without investing large amounts of money. The technical limitations of this product, the possibility of mass decoration and polishing are replaced by glazing the surface, although with the disadvantage that qualities are lost and thus, certain targeted applications; however we gain in decorative possibilities and also in the capacity to differentiate the company's product surpassing the current quality of porcelain tiles. The overall advantage is to gain or recuperate clients and increase prices.

As we have already mentioned, these new technical advances along with new formal suggestions of the four most important trends have led to new tendency lines:

1. NEO-CLASSICAL: this tendency is aimed at a conservative audience who still measures beauty, elegance and balance by classical standards. Forms, materials and spatial layout should strictly respect the Greco-Roman heritage. Comfort is obtained when this aesthetic discourse is respected and signs are meaningful. This allows the user to be surrounded by a luxury which has been democratised and is socially acceptable.

In this tendency, the bases are framed with large rectangular formats with exact marble reproductions and thanks to advanced printing technology, random forms, as happens in nature, can be obtained. Granulars can be polished and applied to the base or glazed with excellent quality. This is made possible with a high gram content and good glaze covering. This produces the effect of a specular gloss on the polished marble. The borders of the base are machined in order to eliminate the white outline left by the printing and therefore, a more natural effect is created.

In flooring, large square formats are offered with the same technical decoration if the surroundings allow or with granulars if transit and usage make it necessary. The range of complementary pieces for the covering of the floor is taken straight from interpretations of plant and geometrical motifs of the classical world as well as craftwork motifs of marble inlays.

The pieces are laid to create skirting or dados in two contrasting tones. Large skirtings with patterns in relief are decorated with dry applications. Half way up, topping the surface, are mouldings and borders which occasionally form the complete piece, and are intertwined with regular inserts. The complementary pieces for the flooring are borders with classical and neo-classical



designs. Notably present are borders whose motifs are made up of two pieces, as well as the corner angle, in a pure neo-classical style.

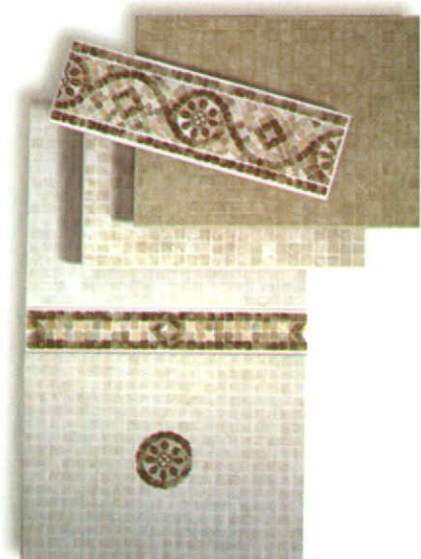


The development of cutting machinery and the proliferation of factories that subcontract this service has produced a rapid and noticeable rise in the number of large prefabricated rose-shaped pieces. The variety of colours in flooring tiles has increased due to the development of glazes, which allows us to incorporate a new range of marble styles.

2. CLASSICAL MEMORY: unlike the previous trend, classical memory does not try to reproduce exact Greco-Roman aesthetics, the final result may even be substantially different. It uses the classical range as part of a cultural heritage by redesigning motifs, effects, compositions and craftwork.

This trend is aimed at a conservative audience who likes to be able to recognise its familiar surroundings and comfort. Although this audience is younger it is concerned about many things. This consumer enjoys the comfort of a classical environment and does not require the acquiescence of luxury.

Columns are simulated in wall coverings. The motifs on the borders are manipulated and monochrome, plain white or patterns in relief are interspersed amongst the tiles. Ceramics are interspersed with natural stone or resins that reproduce motifs in relief with rectangular pieces or curves which allow the framing of mirrors and the creation of niches.



Mosaic is simulated with screen printing or is reproduced by press strokes which leave an orthogonal grid on the piece. The pieces are engobed, glazed and decorated with a roller which enables the bas-relief to be filled with cement. This way, the original format of the piece can be disguised, simulating small tesserae.

3. CLASSICAL NATURE: this tendency is orientated towards decorating second residences, mainly rural style houses. Its aim is the replacement and restoration of luxurious houses.

It is aimed at attracting consumers with a high purchasing power who are searching for refuge and peace far away from the city and the rhythm of

[4]. The terms "postmodern" and "late modern" are used by the historian Charles Jenkins in his analysis of modern architecture: *Arquitectura Internacional. Últimas tendencias*. Barcelona 1989.

daily life, some place where comfort and tranquillity unite with the sobriety and balance of the classical world. This range is inspired in simple themes from classical geometry. Colours are light, bright and inspire harmony. The marbled bases are quite stone-like, and they do not have large decorations. The streaks on the marble are soft and practically unnoticeable. Sobriety rules so as to suit the antique furniture in the house.

4. POST-MODERN: this tendency aims to modernise and revive the classical world from an avant-garde point of view. It relates to the classical world, distorting and revitalising it in order to create a new language. In this sense it is a transgressor when facing historical avant-gardes that are escaping from any reference of a cultural past, rejecting eclectic and academic art trying to regain history. The key words are plurality, hybridism and complexity as part of our culture and it is faced with the purity, the simplicity and the rationality of the designs of late modernism^[4].

The consumer here is much less conservative and belongs to the wealthy middle classes, he enjoys travelling but not flying and he likes surprising but not innovating. This trend was thought for public spaces in need of a certain ambiguity. It offers a range of classical antiquity but updates it by suggesting new colours, live and intense ones or colours obtained by technical effects. This trend also uses themes from classical textiles, such as velvet or damask finishes.

This trend combines well with today's furniture and it is used especially for covering bathroom walls. It also offers porcelain tiles which imitate stone qualities thanks to the advances made in decorative systems such as screen printing which imitate semi-precious stones with the intensity obtained in the colour, the double charge to obtain stone-like effects or by combining different techniques. Formats are regular and range from medium to large size, depending on the natural stone offer.

5. TRADITION: the rich ceramic heritage of this sector obliges it and conditions it to continually revise its history and this has led, along with small craftshops with wide ranges that keep the past alive, to a rich selection of colours and a great diversity in decoration that we recognise as ceramic effects and this is the industrial imitation of this legacy.

This product, which seemed to be aimed at a consumer that is interested in everything related to craftwork, to authenticity, someone who rejects imitations of materials, the banality of luxury, the cost-free status of superfluity, a consumer who was once rebellious, has become part of everyday life. With industrialisation, it has become cheaper and resembles craftwork more and more. Today it can also be found in the city and not only in second residences.

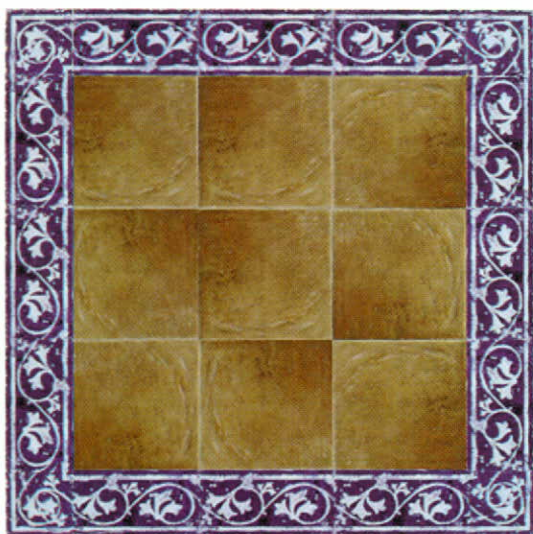
The characteristics of this offer are products with small glazed formats and



traditional ranges. Its main colours are cobalt blue, turquoise, yellow, red, orange, olive green and copper green. The white aged looking tiles are decorated with small hairline cracks, irregular surfaces, pinholing, and also the complementary pieces have a rich range of medieval and baroque motifs.

Within this offer we find salt stoneware and extruded tiles. In flooring, we can also find terracotta style bases, although it is becoming more popular for the base to come up the wall. Nowadays, natural qualities are imitated with matt glaze in clay-like tones and automatic airbrushing with masks and screen printing, which imitate discolouring in the clay caused by the wood firing and the passing of time.

The terracotta type bases are decorated with a thicker screen prints and glazes are decorated in bas-relief. Glaze effects can also be obtained with reactive products from the ceramic industry. It is common to see a hand-painted effect and also a climbing-like effect.



In the ambience that is created it is necessary to have special pieces for centre pieces and borders. The decorations of corners, borders inserts and compositions of four or more pieces enrich the company's product and allow the consumer to create his own personal atmosphere.

6 ARCHAEOLOGY OF MATERIALS:

in this trend, history and nature unite to offer matt qualities based on a historicist range. It highlights the Romanesque period in which stone carving was important.

This trend was originally aimed at a European market which is strongly linked to rural life and has such a rich medieval legacy. Later, as people became more aware of the environment, it opened up to other markets. Therefore, the consumer of this product is a cultured person, concerned about nature and his cultural heritage, even though he is committed in a more formal than active way.

In the beginning, this product was used to try out complex and varied techniques which gave a rustic and aged-looking effect to the tile. Nowadays, as this style has become more popular, a more functional tile is required. The effects have become softer, therefore it has acquired a more simulated than real look but with the advantage that it gets less soiled and is easier to clean.

The bases used for this trend are stone-like tiles which are obtained by press strokes, airbrushing machines and screen printing. The colour range goes from cold to light earthy colours and they are usually lineal applications as these do not require a third firing. The decorated pieces are obtained by press stroke and they are cut afterwards. They have patterns in relief from the Romanesque range. However, third firing led to the development of the application of thick layers of granulars in matt tones which had screen printing of powdered glaze to produce streaks that gave the effect of a hand sculptured piece.

7. REVITALIZATION OF HISTORY: the wear and tear of history has led us to search for and update historicist ranges, due to technical advances and also because it

needs to be modernised therefore, large companies need to personalise their historical offer. This tendency is not only based on traditional ceramic heritage or Renaissance frescos but it also finds new interpretations for styles which are closer to our time such as hydraulic flooring or the decorative styles from the end of the last century. This tendency represents the need to adopt former signs without following the exact same plan. This time, the consumer does not have a conservative ideology, nor a purist one, on the contrary, this trend is aimed at a consumer who needs to recognise himself as part of our history. He needs history to be a part of his daily life.



This enables him to have his own warm and comfortable refuge, away from the stresses of daily life. This consumer does not reject the future although he does not trust it either. He does not look back on the past in a nostalgic way, he sees it as a source of knowledge and experience.

The characteristics of this offer are an updating of a rich selection of colours, from the redesigning of traditional earthy matt colours to transparent designs, which highlight the reliefs on the base and the return of formats and pieces used as alternative decoration. The bases have small formats and they are able to adapt to new industrial processes with press strokes, the application of granulars on the base - relief, thick coverings, screen prints that imitate hand painting. Volume plays an important part in this offer.

8 ECO-NATURAL: this trend represents our concern for the environment and our desire to find ourselves surrounded continuously by nature, so that we can escape from the aggressive and artificial world that surrounds us. The fundamental difference in this trend is the absence of decoration. It bases its richness on the qualities achieved on the base and on the set of modular systems. The only decoration on the tile is small incisions of primitive signs on the surface. It has no identifiable figures and tries to find an austere type of beauty in geometrical abstractions, its aim is to create an "ecological" look.

It has stone-like bases and the colours it presents are based on minerals, therefore it uses dark tones that go from graphite to iron oxide and manganese and also clear tones based on calcareous stones. In this range, we can also find rustic wood bases with patterns in relief and matt qualities, which also have sets of modular systems. It is normal to find bases with two different tones or colours



combined together, creating such a rich selection of colours that seem to blend in with nature.

9 STIMULUS OF NATURE: this trend is inspired in nature but does not aim to simply copy or reproduce it. It creates new scenarios. Wild or domesticated nature turns



into a yearning for what is disappearing and is seen as an endeavour to create new relation systems from a perspective of contemporary reality and a perspective of the near future. Instead of being our enemy, technology becomes the means for us to establish a dialogue.

The profile of this consumer is similar to the ecologist one. Someone who assumes his own contradictions without getting weaker,

someone who is aware of the fact that a radical preservation is antinatural and that it has unknown consequences for the future. He trusts the law of nature more than he trusts human ethics. He loves the wilderness and nature so much that he would want to send his own children to a nature school and visit nature parks with them. When they come home, they would bring back the memories of the colours, the light and scents which are placed in corners and shelves of their home to remind them of the time they spent away in the wild.

In response to this tendency, the ceramic sector combined technical efforts and creativity together to create new intelligent products capable of transmitting essence, grace and the freshness of nature. In tile coverings we can find combinations of terracotta glazed with earthy colours and with laser insertions of pet animals, fruit from the earth and ethnic signs. Additional pieces are used as botanical pictures to remind us of the lobe beauty. Wood with rustic qualities are enriched with soft polychromes and simple geometry.

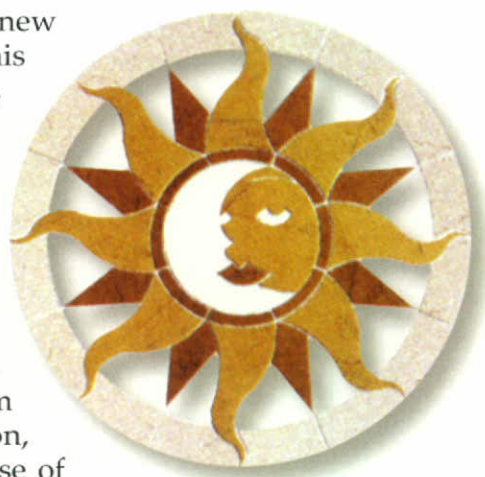


Floorings are embellished with the design of a leaf which has blown from a tree and blended into the clay. The new technologies (pressing machines, multi-feeders, mixers, lasers, double loading, CAD-CAM), emulate nature to create a mixture of materials, surfaces and effects that geography could not, making stones in which the only skill used is the shaping of them. Is this not a similar process to the one followed in artificial insemination?

10. MODERN AVANT-GARDE: close to the previous trend although without the same ecological militancy, we can find an attitude which descends from modernity and

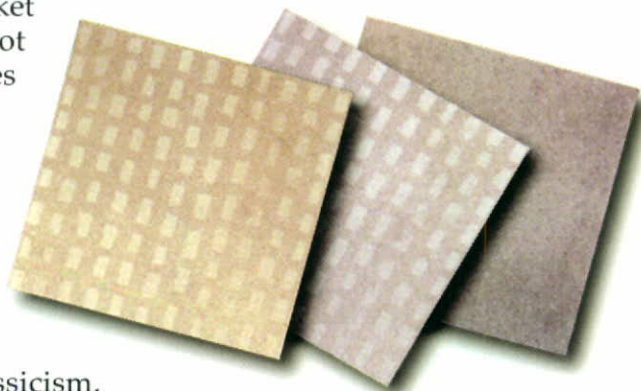
sees creativity as an effort to create a new space, a new dimension and a new relation system. Within this desire to suggest a new interpretation of reality, everything familiar is rejected, everything that already exists is detached from what has already been established.

This investigation is being carried out in a rational way, without searching in vain for innovations, for what is free, unnecessary and superfluous. It is carried out in the context that has been set, from the combination of materials, from conceptualism, experimentation, distortion, marginality, recognition of teachers, from an exercise of maximum simplification.



There are many difficulties for this concept to reach our sector. It is most definitely the most neglected trend and therefore, the one that needs most attention of all. The use of material and the characteristics of the industry oblige us to avoid any risks, but we can discover the work of an artist, his sense of humour, mythologising colours, the luxury of emptiness, the intelligence of simplicity, the use of new materials, the suggestion of a new disposition and the search for a new effect hidden amongst the great artists or among the pages of a small but perfect catalogue.

How many consumers is this trend aimed at? It is aimed at a small public, but it exists, and that is enough to raise efforts so as to create new proposals and suggestions that will be acknowledged by consumers who are anxiously awaiting new products. Some large companies acknowledge the role this trend is playing in the ceramic sector and always reserve a place for innovations. Others have concentrated on this market and therefore enjoy the luxury of not having to compete with other companies of a large scale.



Even today, innovation is valued from a technical perspective. The technological advances(machinery, raw materials, processing) are those which stimulate development. Progress is measured by the size and capacity of the pieces. Nevertheless, classicism, history, nature and innovation are the trends that stimulate the ceramic products, the search for effects, the development of machinery and the materials required. Technology can lead to fashion in the same way as tile cutting has made rose shaped designs fashionable, although it is the need to characterise a space and the technical and formal capacity to respond to this need which defines a trend. Then, the intelligence of the our marketing department communicate this need and this product to the industry and the consumer will naturally consolidate it.

For this reason, we have to be aware of the rapid advances in consumer needs, in order to stimulate new requirements, and apply technical responses to these requirements and overall, to be able to communicate to the consumer that we can



offer him what he needs, that we have the answer to his dreams and are working on future projects to be able to provide him with what he hasn't even yet imagined. Many sectors are aware of this and make a great effort to reach the consumer. Sociologists and market analysts advise us not to delegate our sales outlets, as other interests can destroy all the efforts that have already been made. We must look for new formulas from every possible means or investigate new technological developments which will allow us to come closer to the consumer.

For the moment, the future the industry will follow will remain close to the four basic trends previously described. New intersections will be suggested, which will be, once more, the result of technical advances in response to the need for both consumers and companies to look for innovations. Faced with a social environment which is known to be unstable and agitated, public and private spaces will have to provide the security and comfort that tradition, culture and nature transmit, and feed our desire of evasion and adventure that livens the atmosphere. The ceramic industry, mindful of these needs, should provide us with products that define our habitat.

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