

MADE IN PORTUGAL

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Construction Materials Cluster

Ornamental Rocks

Portugal offers a diversified range of natural stones (monumental, slate, granite, marble, travertines, and other limestones) and exclusive rocks, known for their high quality even in the most demanding markets.

Characterised by tradition, production capacity and know-how, this sector consists of well-equipped companies with expertise in extraction and transformation technologies. Through innovation, they have specialised in developing alternative products in the international market with an emphasis on exclusivity and competitiveness.

France, China, Spain, Germany, and the U.K. are the industry's main consumer markets, an industry which mostly made up of small and medium-sized companies (known as PME).

Industry trends:

- » Increased demand for high added-value (high-end) products;
- » Investment in product performance and customisation;
- » Combining materials – Stork project (stone + cork);
- » Strategic partnerships with world-famous designers to develop differentiated product lines;
- » Cooperation between different sectors to develop new product promotion and implementation plans.

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Ceramics:

The notorious Portuguese construction ceramics industry (tiles, ceramic tiles and mosaics, roof tiles, brick and sanitary ware) has secured a good reputation and widespread recognition in the international market for the quality, uniqueness and high performance of its products, sustained by innovation, design, tradition and know-how. Companies in this sector are characterised by their production flexibility, namely in how they adapt to new consumer trends. These companies continuously reaffirm the relevance of ceramic products compared to synthetic materials, especially during recovery periods in the construction sector.

The ceramics sector consists mostly of small and medium-sized companies focused on export trade, with France, Spain, the U.K., Germany, and Italy as their main consumer markets.

Industry trends:

- » Proximity to customers and emergence of new niche markets;
- » New production techniques and product lines aligned with modern construction techniques (e.g. solar roof tiles);
- » Development of integrated solutions and multifunctional products;
- » Investment in I&D and in innovation: nano-infused ceramic (ceramic sensors);
- » Commitment to sustainability (environmental policies, energy efficiency).

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Wood

The wood industry encompasses a wide range of products, including sawn wood, veneers and plywood, wood panels, wood fibre panels and carpentry work for construction purposes.

Portugal has a long tradition and know-how when it comes to processing this wholly sustainable raw material. Most Portuguese companies in this industry are small or medium-sized. They are known for their advanced technological expertise and strong operational and commercial flexibility, being able to meet demanding deadlines due to their efficient logistics.

The Portuguese wood industry has a significant interest in export trade, conducting business mostly with Spain, the U.K., France, Morocco, and the Netherlands.

Industry trends:

- » I&D investment facilitates further differentiation of products and services;
- » Increased number of productivity indicators;
- » Process automation;
- » Investment in energy efficiency systems;
- » Implementation of e-commerce platforms;
- » Forest, quality, and chain of custody/responsibility certification;
- » Reinforcing cooperation networks: companies, suppliers, distributors, clients, and scientific and technological institutions.

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Cork

Portugal is an industry leader and the world's main producer and exporter of cork, accounting for 49% of its global production and 60% of its total exports (72% in cork stoppers and 25% in construction material).

The sector has gained international acclaim for its differentiation, versatility, and for the competitive advantages associated to its main product: agglomerated cork.

Cork is versatile, sustainable, and 100% natural: it is light, flexible, compressible, and impervious to liquids and gases, it provides thermal and acoustic insulation, and is a slow combustion raw material that is highly resistant to friction, in addition to being hypoallergenic and anti-static.

The use of this product is wide-ranging, having been adopted by several sectors including construction, infrastructure, architecture, product design and interior design, as well as by the wine, transport, energy, aerospace, health, sports fashion industries, among many others.

The sector is mostly formed by small and medium-sized companies (PME) trading with international markets such as Germany, Spain, the U.S.A., France, and Russia.

Industry trends:

- » High product performance;
- » Continuous investment in I&D and innovation (technological development);
- » Combining materials – Stork project (stone + cork);
- » Sustainability and eco-innovation;
- » Forest, quality, and chain of custody/responsibility certification;
- » Increase in exports;
- » Market diversification.

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Metals

The metal sector includes products and subsectors such as hardware, locks, taps, valves, barbed wire, tubes, profiles, and metal parts for construction work.

The Portuguese metal industry is well-established and known for its production capacity, flexibility, innovation, implementation of new technologies and digital transformation processes (e.g. BIM), making it a highly reputable, adaptable, and sustainable industry even in the most demanding markets.

This sector is mostly made up of small and/or medium-sized companies (known as PME). The high export capacity and the competitive advantages of these Portuguese companies has made trade with France, Spain, Germany, Angola, and the U.K. possible, to name a few.

Industry trends:

- » Incorporating technology in the production and digitalisation process;
- » Investment in innovation and design;
- » Easy, quick, and safe solutions regarding construction;
- » Product durability;
- » Commitment to sustainability (recycling, energy efficiency).

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Cement, Plaster, Concrete and Associated Works

This sector includes products and subsectors such as hydraulic cement, ready-mixed concrete, mortars, plaster, and aggregates.

This sector is made up of a few hundred industrial companies that, in recent years, have decided to expand to new markets and whose current, more frequent customers include Spain, France, the U.K., Cape Verde, and the Netherlands.

Industry trends:

- » Incorporation of recent technology;
- » Promoting a circular economy;
- » Sustainability (low-carbon economy);
- » Stimulating the regional economy;
- » Introducing the best health and safety practices in the workplace and in liaising with neighbouring communities.

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Plastic

Among the plastic materials frequently used in construction, we can find pipes and accessories, builders ware, bathtubs, washbasins, toilets, and toilet seats.

This plastic industry consists mostly of small and medium-sized industrial companies. It has a significant interest in export trade, conducting business mostly with Spain, France, Germany, Angola, and the Netherlands.

Industry trends:

- » Product performance;
- » Automation (robotisation);
- » Sustainability (recycling);
- » Increase in exports;
- » Thriving new markets.

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Paints and Varnishes

This sector includes the following products: paints, glues, and varnishes.

It is mostly comprised of small and medium-sized businesses focusing predominantly on the international market, with Spain, France, Italy, Turkey, and Poland as their main export destinations.

Industry trends:

- » Innovation in terms of raw materials and final products;
- » Introduction of new technologies;
- » High productivity;
- » Compliance with hygiene and safety standards (for workers and clients);
- » Environment protection;
- » Market diversification.

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Glass

The glass sector includes products and subsectors such as glass, tempered glass, stained glass, safety glass, cubes, tablets and similar articles.

This sector is essentially made up of small and medium-sized exporting companies, with Spain, Angola, France, Iran, and Switzerland as their main consumer markets.

Industry trends:

- » Product performance;
- » Innovation (products and processes);
- » Promoting eco design and a circular economy;
- » Increase in exports;
- » Market diversification.

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