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2014 Ceramic Tile Industry Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption in 2014 was 2.49 billion sq. ft., up 0.5% vs. 2013 (2.48 billion sq. ft.).¹ This marks the fifth consecutive year of growth in U.S. ceramic tile consumption.

The following table shows U.S. tile shipments, imports, exports, and total consumption in thousands of sq. ft.

<u>Year</u>	<u>U.S. Shipments (incl. Exports)</u>	<u>Imports</u>	<u>Exports</u>	<u>Total Consumption*</u>	<u>% Change in Consumption from Previous Year</u>
2014	821,600	1,711,571	42,547	2,490,624	0.5
2013	793,931	1,723,470	39,513	2,477,888	12.9
2012	748,290	1,491,845	45,618	2,194,518	5.4
2011	717,865	1,410,194	45,278	2,082,781	4.0
2010	649,057	1,394,779	42,044	2,001,792	7.7

*Note: U.S. Shipments + Imports – Exports

The chart below shows total U.S. consumption of ceramic tile (in sq. ft.) over the last decade.

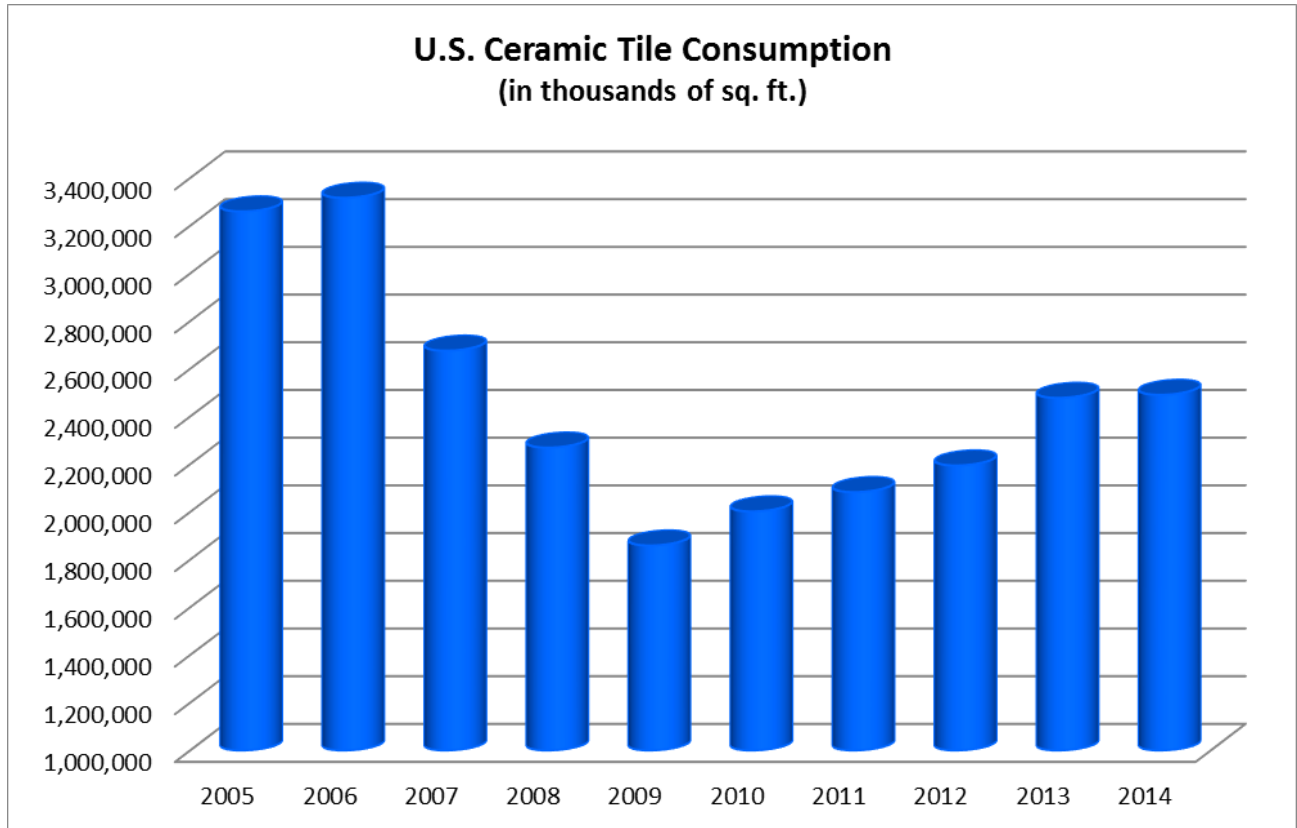
¹ U.S. Dept. of Commerce & Tile Council of North America

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Imports:

In 2014, 1.71 billion sq. ft. of ceramic tile arrived in the U.S., a 0.7% decrease from 2013 (1.72 billion sq. ft.).

Imports in 2014 made up 68.7% of U.S. tile consumption (in sq. ft.), down from 69.6% in the previous year.

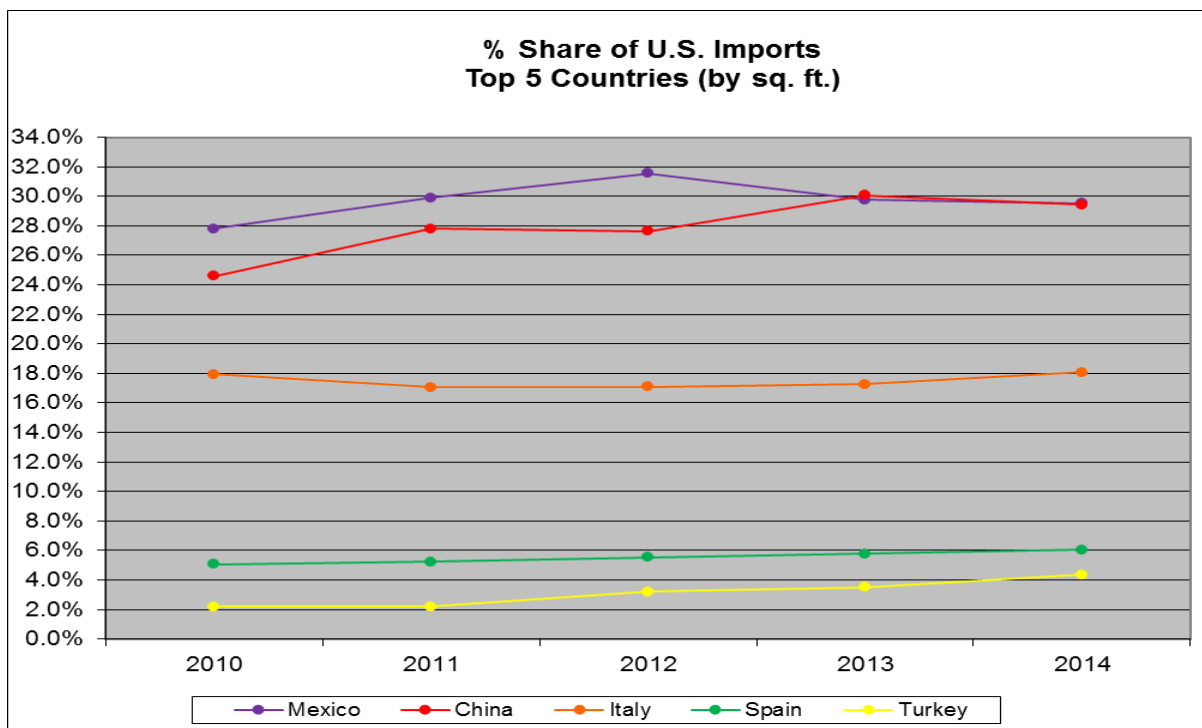
Mexico, the top exporter to the U.S. from 2008-2012, lost its top exporter status (in sq. ft.) in 2013 to China. However, in 2014, Mexico was once again the top exporter to the U.S. with a 29.5% share of imports. China was in second place with a 29.4% share, followed by Italy, which



was in third place with an 18.1% share. Spain and Turkey rounded out the top five with a 6.0% and 4.3% share of imports, respectively.²

The top five countries from which tiles were imported in 2014 based on sq. ft. were:

Country	Sq. Ft. 2014	Sq. Ft. 2013	2014/2013 % Change	2013/2012 % Change
Mexico	505,267,567	513,051,995	-1.5%	9.0%
China	503,633,907	518,337,010	-2.8%	25.8%
Italy	309,111,909	297,683,757	3.8%	16.8%
Spain	103,212,414	99,521,071	3.7%	20.3%
Turkey	74,375,403	60,855,436	22.2%	29.1%



Italy remained the top exporter to the U.S. on a dollar basis in 2014, comprising 34.8% of U.S. imports. China was second with a 25.7% share, and Mexico was third with a 16.5% share.

² U.S. Dept. of Commerce



The top five countries from which tiles were imported in 2014 based on total U.S. \$ value (including duty, freight, and insurance) were:

Country	Total Val 2014 (in \$)	Total Val 2013 (in \$)	2014/2013 % Change	2013/2012 % Change
Italy	634,888,206	584,121,619	8.7%	17.8%
China	469,208,103	448,306,405	4.7%	32.5%
Mexico	300,680,754	299,359,053	0.4%	12.3%
Spain	161,599,182	142,945,132	13.0%	19.1%
Turkey	79,781,165	60,332,901	32.2%	42.0%
All Countries	1,822,777,268	1,724,710,956	5.7%	19.7%

The average values of tile³ from the top five countries (based on sq. ft.) from which tiles were imported in 2014 were:

Country	Sq. Ft. 2014	Total Val 2014 (in \$)	Value per Sq. Ft. 2014	Value per Sq. Ft. 2013	Value per Sq. Ft. 2012
Mexico	505,267,567	300,680,754	\$0.60	\$0.58	\$0.57
China	503,633,907	469,208,103	\$0.93	\$0.86	\$0.82
Italy	309,111,909	634,888,206	\$2.05	\$1.96	\$1.94
Spain	103,212,414	161,599,182	\$1.57	\$1.44	\$1.45
Turkey	74,375,403	79,781,165	\$1.07	\$0.99	\$0.90
All Countries	1,711,570,838	1,822,777,268	\$1.06	\$1.00	\$0.97

U.S. Shipments:

In 2014 domestic shipments (less exports) were at 779.1 million sq. ft., up 3.3% from 2013, in which 754.4 million sq. ft. of ceramic tile were shipped domestically.

In dollar value U.S. FOB factory sales of domestic shipments (less exports) in 2014 were \$1.15 billion, up 6.8% vs. 2013 (\$1.08 billion).⁴

³ The average value is significantly affected by the mix of tiles imported, with different types of tiles impacting the average value, in addition to differences in pricing for the same types of tile.

⁴ Tile Council of North America





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Exports:

U.S. ceramic tile exports in 2014 were at 42.5 million sq. ft., up 7.7% vs. 2013. The vast majority of these exports (in sq. ft.) were to Canada (66.5%) and Mexico (15.3%).⁵

Economic Highlights:

- The government's 2014 estimate of the change in real GDP was 2.4%, an increase of 0.2 percentage points from the change seen in 2013.⁶
- New home starts increased for the fifth consecutive year and were at their highest annual level since 2007. The 1,003,300 units started in 2014 represented an 8.0% increase from the previous year.⁷
- New home sales were at a six-year high of 436,000 units, up 1.6% vs. 2013.⁸
- Existing single family home sales in 2014 were at a level of 4.34 million units, down 3.1% vs. 2013 and the first year-over-year decrease since 2009-2010.⁹
- There were 1.12 million foreclosure filings on U.S. properties in 2014, down 17.9% from 2013, and the lowest annual total since 2006.¹⁰
- The 30-year fixed mortgage rate rose from 3.98% in 2013 to 4.17% in 2014. Even with this increase the 2014 annual rate was still the third lowest on record.¹¹
- The U.S. unemployment rate in 2014 was 6.2%, down from 7.4% in 2013 and the lowest rate since 2008.¹²
- U.S. construction spending (includes both private and public residential and non-residential construction) in 2014 was \$960.6 billion, a 5.5% increase from the previous year.¹³

⁵ U.S. Dept. of Commerce

⁶ Bureau of Economic Analysis

⁷ U.S. Census Bureau

⁸ U.S. Census Bureau

⁹ National Association of Realtors

¹⁰ RealtyTrac

¹¹ Freddie Mac

¹² Bureau of Labor Statistics

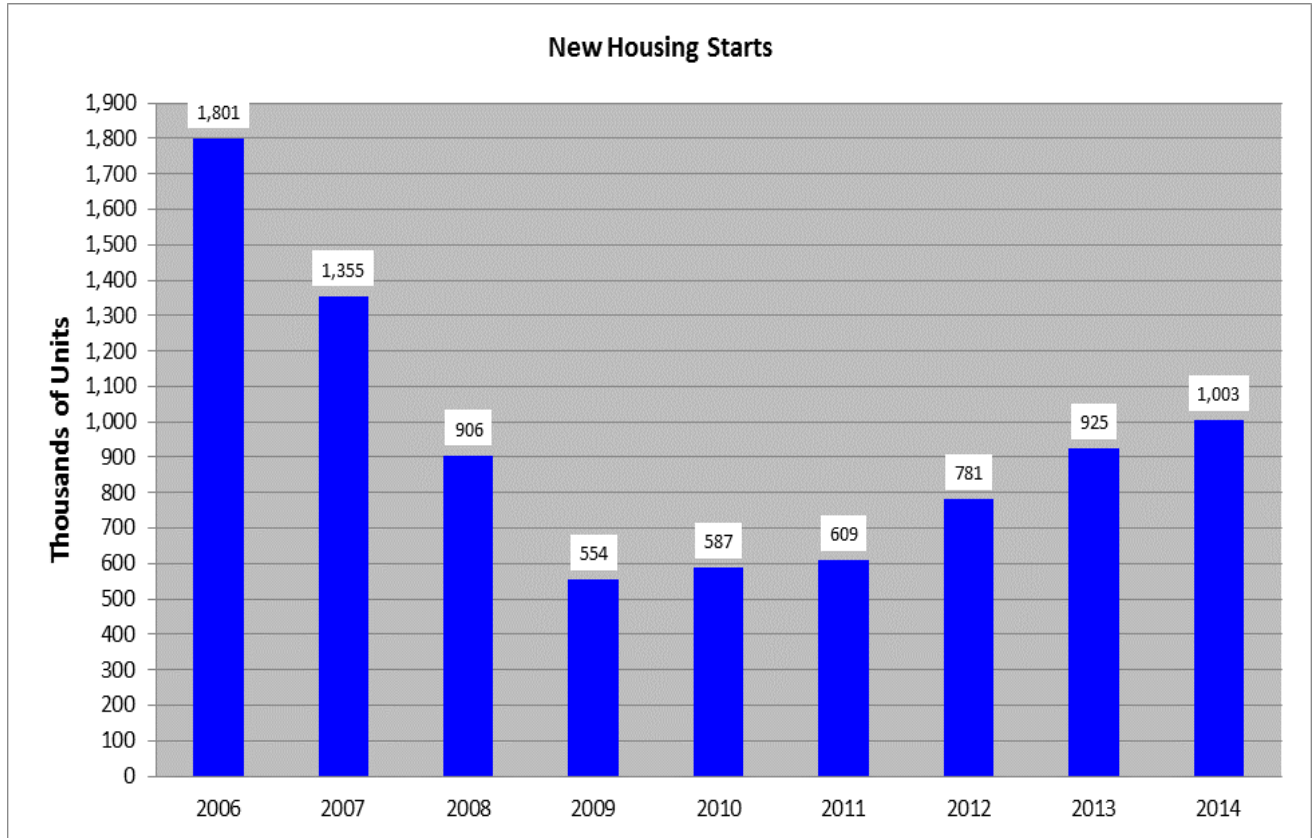
¹³ U.S. Census Bureau

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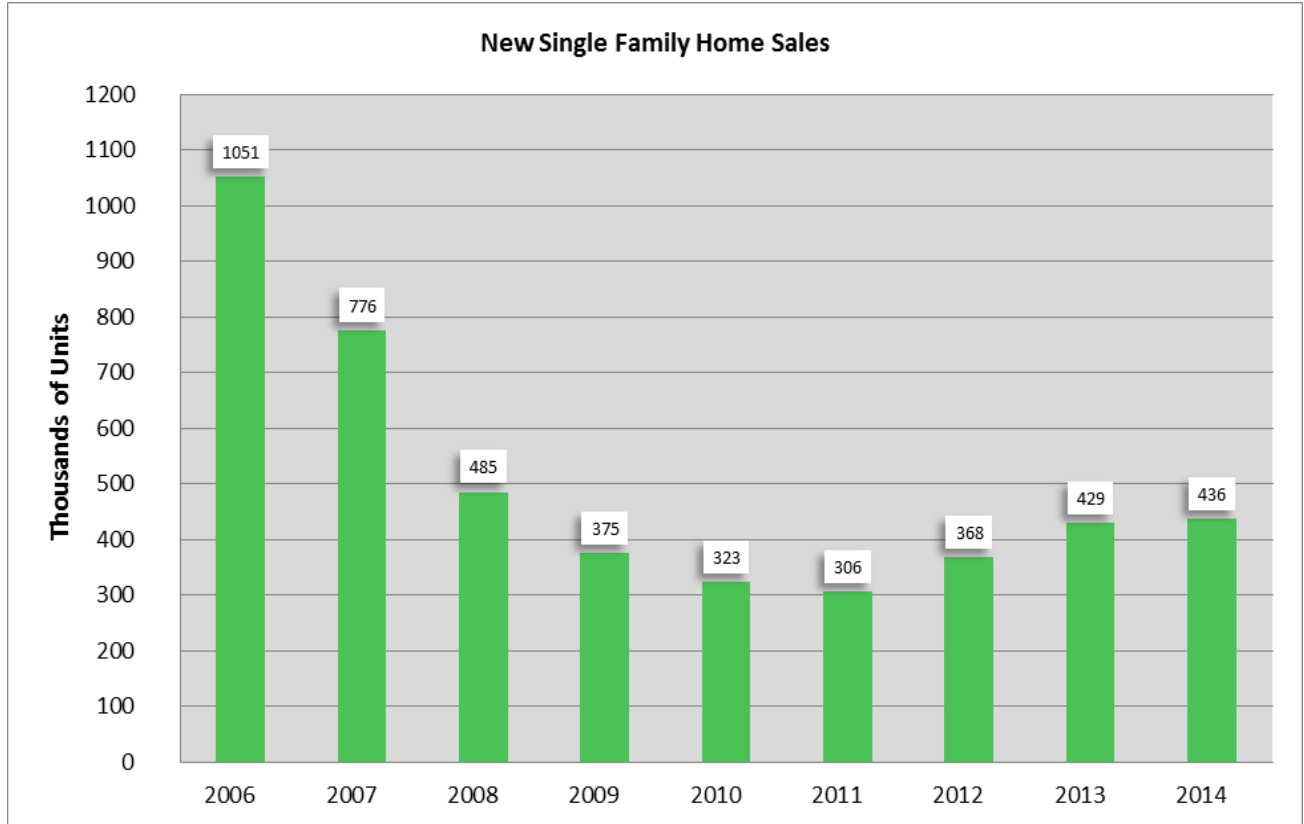
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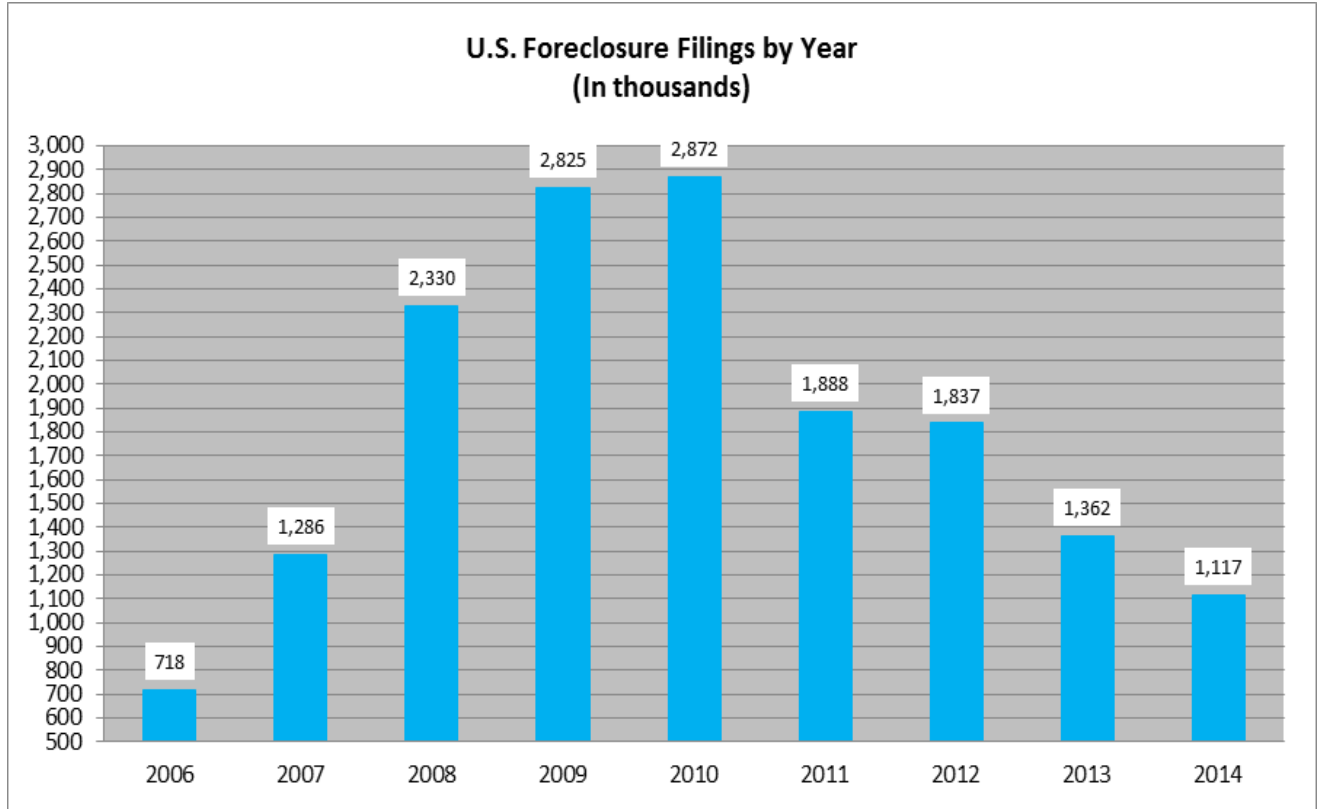




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