



Website: [www.tileusa.com](http://www.tileusa.com) . Literature: [literature@tileusa.com](mailto:literature@tileusa.com)

FOR IMMEDIATE RELEASE:  
November 17, 2014

Contact: Andrew Whitmire  
T: 864-646-8453 ext. 102

## 2Q 2014 Ceramic Tile Industry Update

### U.S. Tile Consumption Overview:

U.S. ceramic tile consumption through 2Q 2014 was 1.21 billion sq. ft. (-1.1% vs. 2Q 2013 YTD). If the trend continues for the remainder of the year, this would be the first year-over-year decline in consumption since 2009.

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>
2Q 2014 YTD	399,943	826,270	17,522	1,208,690	-1.1**
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

\*\*Note: % change vs. 2Q 2013 YTD

### Imports:

Through 2Q 2014, 826.3 million sq. ft. of ceramic tile arrived in the U.S. This was a 1.3% decrease from 2Q 2013 YTD, in which 837.3 million sq. ft. of ceramic tile were imported into the U.S., but a 13.3% increase from 2Q 2012 YTD.

Import penetration through 2Q 2014 was 68.4%, down from 69.6% in 2013.

Through 2Q 2014 Mexico was the top exporter to the U.S. in sq. ft. with a 31.2% share of U.S. imports (in sq. ft.). China was in second place, making up 28.9% of imports, followed by Italy with a 17.6% share.

**TILE COUNCIL OF NORTH AMERICA, INC.**

100 Clemson Research Boulevard . Anderson, South Carolina 29625 . Phone: 864-646-8453 . Fax: 864-646-2821



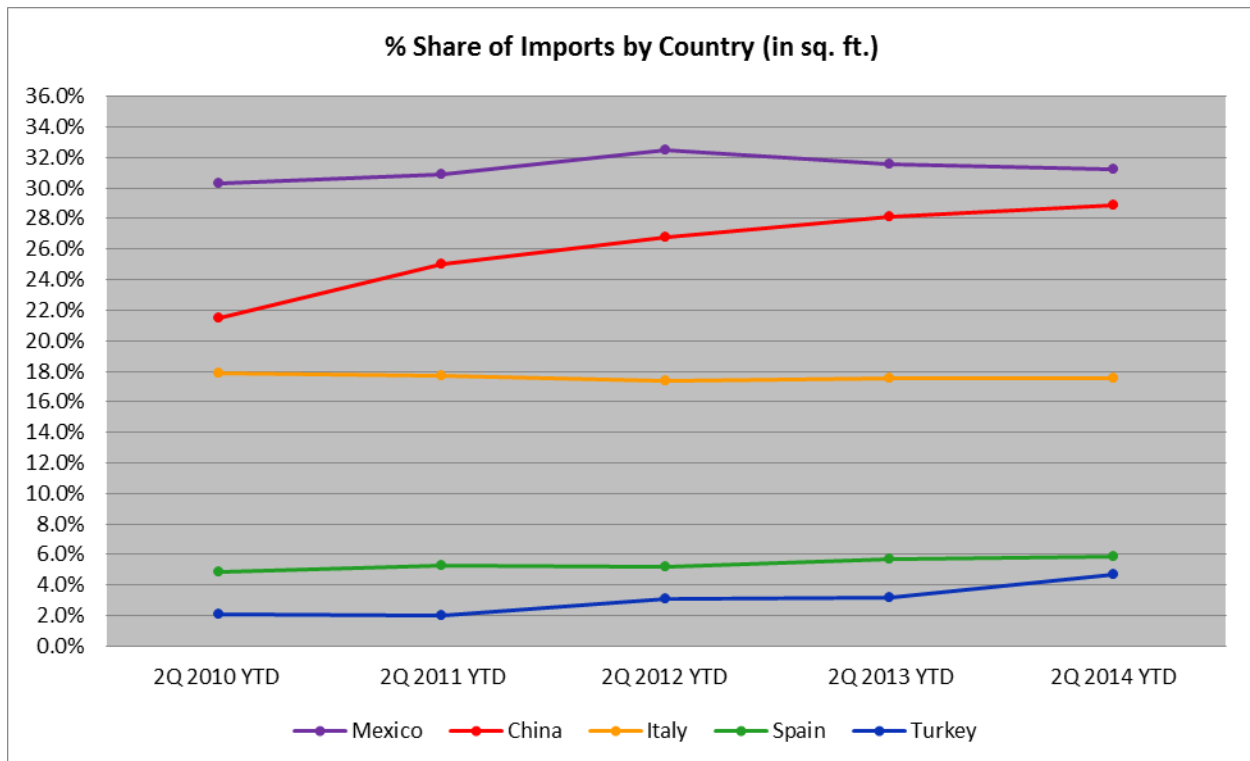
Testing Services: [testing@tileusa.com](mailto:testing@tileusa.com) . Literature Orders: [literature@tileusa.com](mailto:literature@tileusa.com)

On a dollar basis Italy remained the top exporter to the U.S. (2Q 2014 YTD), comprising 34.6% of U.S. imports. China was second with a 25.4% share, and Mexico was third with a 17.4% share.

The \$ value/sq. ft. of all tile imports rose from \$0.99 (2Q 2013 YTD) to \$1.05 for 2Q 2014 YTD.

The top five countries from which tiles were imported through 2Q 2014 based on sq. ft. were:

Country	Sq. Ft. 2Q 2014 YTD	Sq. Ft. 2Q 2013 YTD	2014/2013 % Change	2013/2012 % Change
Mexico	258,105,784	264,853,949	-2.5%	11.8%
China	238,687,582	235,396,183	1.4%	20.6%
Italy	145,263,201	146,486,358	-0.8%	15.7%
Spain	48,328,020	47,528,897	1.7%	25.8%
Turkey	38,536,920	26,701,236	44.3%	19.6%



**TILE COUNCIL OF NORTH AMERICA, INC.**

100 Clemson Research Boulevard . Anderson, South Carolina 29625 . Phone: 864-646-8453 . Fax: 864-646-2821





Website: [www.tileusa.com](http://www.tileusa.com) . Literature: [literature@tileusa.com](mailto:literature@tileusa.com)

The top five countries from which tiles were imported through 2Q 2014 based on total U.S. \$ value (including duty, freight, and insurance) were:

Country	\$ Val 2Q 2014 YTD	\$ Val 2Q 2013 YTD	2014/2013 % Change	2013/2012 % Change
Italy	299,631,453	286,581,514	4.6%	16.4%
China	219,843,080	197,737,463	11.2%	29.7%
Mexico	151,222,476	154,666,537	-2.2%	14.7%
Spain	75,017,765	67,528,039	11.1%	20.7%
Turkey	41,278,614	25,674,421	60.8%	30.2%

The average values of tile from the top five countries (based on sq. ft.) from which tiles were imported through 2Q 2014 were:

Country	Sq. Ft. 2Q 2014 YTD	\$ Val 2Q 2014 YTD	Value per Sq. Ft. 2Q 2014 YTD	Value per Sq. Ft. 2Q 2013 YTD	Value per Sq. Ft. 2Q 2012 YTD
Mexico	258,105,784	151,222,476	\$0.59	\$0.58	\$0.57
China	238,687,582	219,843,080	\$0.92	\$0.84	\$0.78
Italy	145,263,201	299,631,453	\$2.06	\$1.96	\$1.94
Spain	48,328,020	75,017,765	\$1.55	\$1.42	\$1.48
Turkey	38,536,920	41,278,614	\$1.07	\$0.96	\$0.88

### U.S. Shipments:

2Q 2014 YTD U.S. shipments (less exports) were at 382.4 million sq. ft., down 0.7% from 2Q 2013 YTD.

### Exports:

U.S. exports through 2Q 2014 were at 17.5 million sq. ft., down 19.1% vs. 2Q 2013 YTD. The vast majority of these exports (in sq. ft.) were to Canada (60.0%) and Mexico (19.0%).

(Sources: TCNA and U.S. Commerce Dept.)

**TILE COUNCIL OF NORTH AMERICA, INC.**

100 Clemson Research Boulevard . Anderson, South Carolina 29625 . Phone: 864-646-8453 . Fax: 864-646-2821



Testing Services: [testing@tileusa.com](mailto:testing@tileusa.com) . Literature Orders: [literature@tileusa.com](mailto:literature@tileusa.com)

### **Economic highlights:**

- Sept. 2014 new single family home starts were up 17.8% from Sept. 2013 to an annualized rate of 1,017,000 units/yr.<sup>1</sup>
- Sept. 2014 new home sales were up 17.0% from Sept. 2013 to an annualized rate of 467,000 units/yr.<sup>2</sup>
- Existing home sales as of Sept. 2014 were at an annual rate of 4.56 million units, down 1.9% from Sept. 2013.<sup>3</sup>
- There were 107,000 foreclosure filings on U.S. properties in Sept. 2014, down 18.6% vs. Sept. 2013, and the lowest monthly total since July 2006.<sup>4</sup>
- The 30-year fixed mortgage rate in Sept. 2014 was 4.16%, down from 4.49% in Sept. 2013.<sup>5</sup>
- The U.S. unemployment rate was 5.9% in Sept. 2014, down from 7.2% one year ago (Sept. 2013).<sup>6</sup>
- Sept. 2014 total U.S. construction spending (includes both private and public residential and non-residential construction) was at a seasonally-adjusted annual rate of \$951 billion, a 2.9% increase from Sept. 2013.<sup>7</sup>
- The government's preliminary 3Q 2014 estimate of the change in real GDP was 3.5%. This was a decrease of 1.1 percentage points from the change seen in 2Q 2014.<sup>8</sup>

---

<sup>1</sup> U.S. Census Bureau

<sup>2</sup> U.S. Census Bureau

<sup>3</sup> National Association of Realtors

<sup>4</sup> RealtyTrac

<sup>5</sup> Freddie Mac

<sup>6</sup> Bureau of Labor Statistics

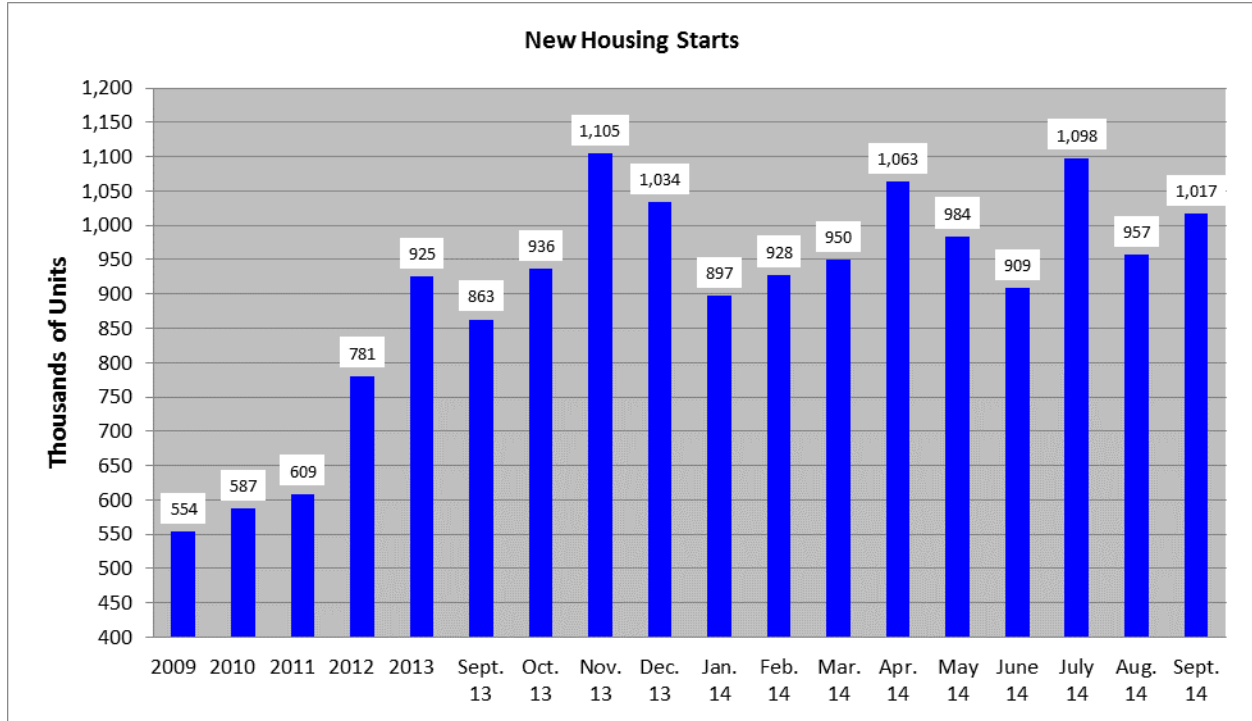
<sup>7</sup> U.S. Census Bureau

<sup>8</sup> Bureau of Economic Analysis

**TILE COUNCIL OF NORTH AMERICA, INC.**

100 Clemson Research Boulevard . Anderson, South Carolina 29625 . Phone: 864-646-8453 . Fax: 864-646-2821

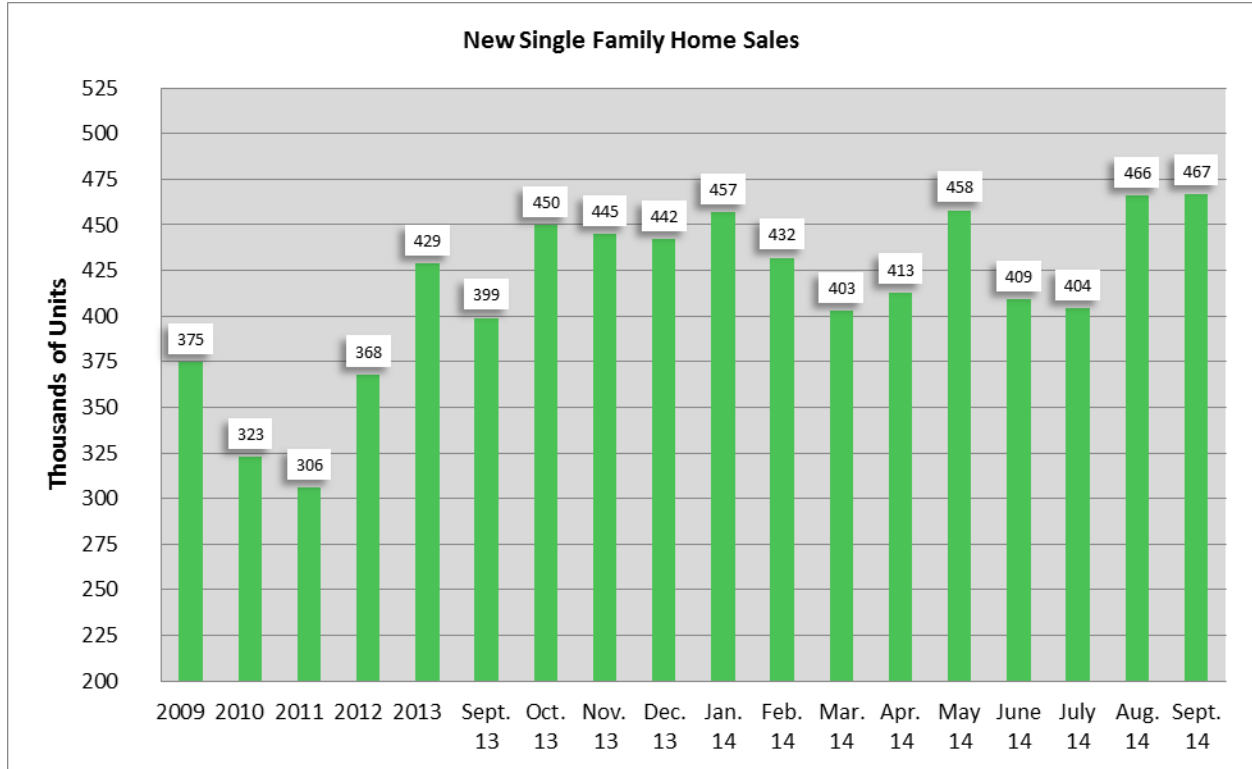




**TILE COUNCIL OF NORTH AMERICA, INC.**

100 Clemson Research Boulevard . Anderson, South Carolina 29625 . Phone: 864-646-8453 . Fax: 864-646-2821





###

