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3Q 2020 U.S. Ceramic Tile Industry Update

U.S. Ceramic Tile Consumption Overview:

U.S. ceramic tile consumption through 3Q 2020 was 2.04 billion sq. ft., an 11.6% decline vs. 3Q 2019 YTD.¹

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>
3Q 2020 YTD	677,983	1,381,194	23,511	2,035,666	-11.6**
2019	895,332	2,077,038	31,782	2,940,588	-5.4
2018	940,300	2,196,935	29,746	3,107,489	1.5
2017	990,972	2,099,307	28,492	3,061,787	5.7
2016	945,245	1,987,929	36,198	2,896,977	5.8

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

**Note: Change from 3Q 2019 YTD

Imports:

Through 3Q 2020, 1.38 billion sq. ft. of ceramic tile arrived in the U.S., down 15.8% from 3Q 2019 YTD.

Imports through 3Q 2020 comprised 67.9% of U.S. tile consumption (by volume), down from 70.6% in 2019.

Spain was the largest exporter to the U.S. (3Q 2020 YTD) with a 20.7% share of U.S. imports (by volume), followed by Mexico (17.6%) and Italy (17.2%).²

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

² U.S. Dept. of Commerce

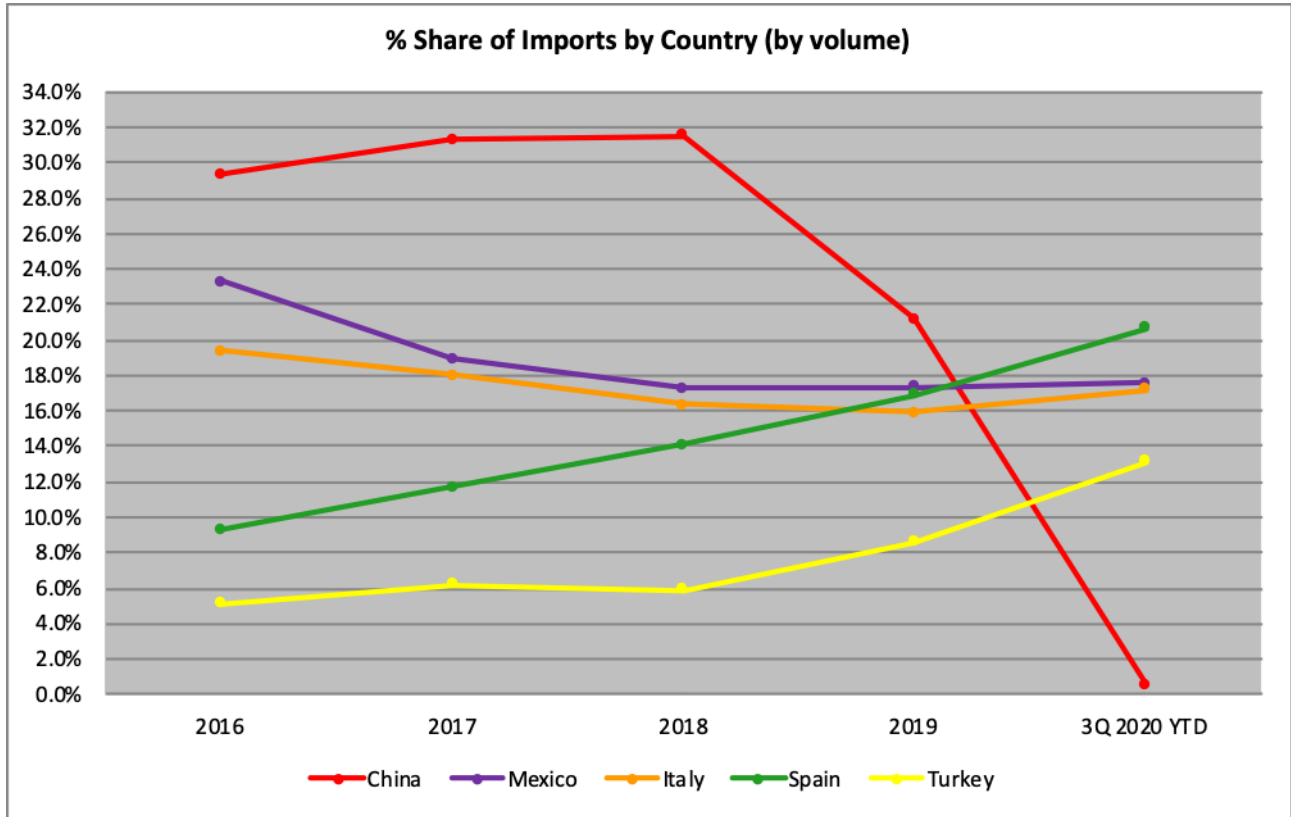
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The following chart shows the % share of U.S. imports by volume for select countries.



The five countries from which the most tiles were imported through 3Q 2020 based on volume were:

Country	Sq. Ft. 3Q 2020 YTD	Sq. Ft. 3Q 2019 YTD	2020/2019 % Change	2019/2018 % Change
Spain	285,501,669	260,585,154	9.6%	9.3%
Mexico	242,830,375	287,272,408	-15.5%	-2.2%
Italy	237,523,788	248,838,327	-4.5%	-10.5%
Turkey	181,269,569	116,646,377	55.4%	19.3%
Brazil	167,240,028	151,498,756	10.4%	32.3%
All Countries	1,381,193,877	1,639,713,491	-15.8%	-1.7%





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Italy remained the largest exporter to the U.S. on a dollar basis (CIF + duty) through 3Q 2020, comprising 32.3% of U.S. imports, followed by Spain (23.1% share) and Mexico (11.4% share).

The five countries from which the most tiles were imported 3Q 2020 YTD based on total U.S. \$ value (CIF + duty) were:

Country	Total \$ Value 3Q 2020 YTD	Total \$ Value 3Q 2019 YTD	2020/2019 % Change	2019/2018 % Change
Italy	457,640,278	496,414,143	-7.8%	-9.6%
Spain	326,988,147	323,473,951	1.1%	16.8%
Mexico	161,266,282	178,240,085	-9.5%	-0.4%
Turkey	136,020,557	84,980,438	60.1%	1.3%
Brazil	108,749,717	91,288,645	19.1%	24.3%
All Countries	1,415,438,656	1,739,176,360	-18.6%	-0.1%

The average values of tile³ (CIF + duty) from the five countries from which the most tiles were imported (based on volume) through 3Q 2020 were:

Country	Sq. Ft. 3Q 2020 YTD	Total \$ Value 3Q 2020 YTD	\$ Val/Sq. Ft. 3Q 2020 YTD	\$ Val/Sq. Ft. 3Q 2019 YTD
Spain	285,501,669	326,988,147	\$1.15	\$1.24
Mexico	242,830,375	161,266,282	\$0.66	\$0.62
Italy	237,523,788	457,640,278	\$1.93	\$1.99
Turkey	181,269,569	136,020,557	\$0.75	\$0.73
Brazil	167,240,028	108,749,717	\$0.65	\$0.60
All Countries	1,381,193,877	1,415,438,656	\$1.02	\$1.06

U.S. Shipments:

U.S. shipments (less exports) 3Q 2020 YTD were 654.5 million sq. ft., down 1.5% vs. 3Q 2019 YTD.

The \$ value/sq. ft. of U.S. shipments (less exports) through 3Q 2020 was \$1.49, down from \$1.54 (3Q 2019 YTD).

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.

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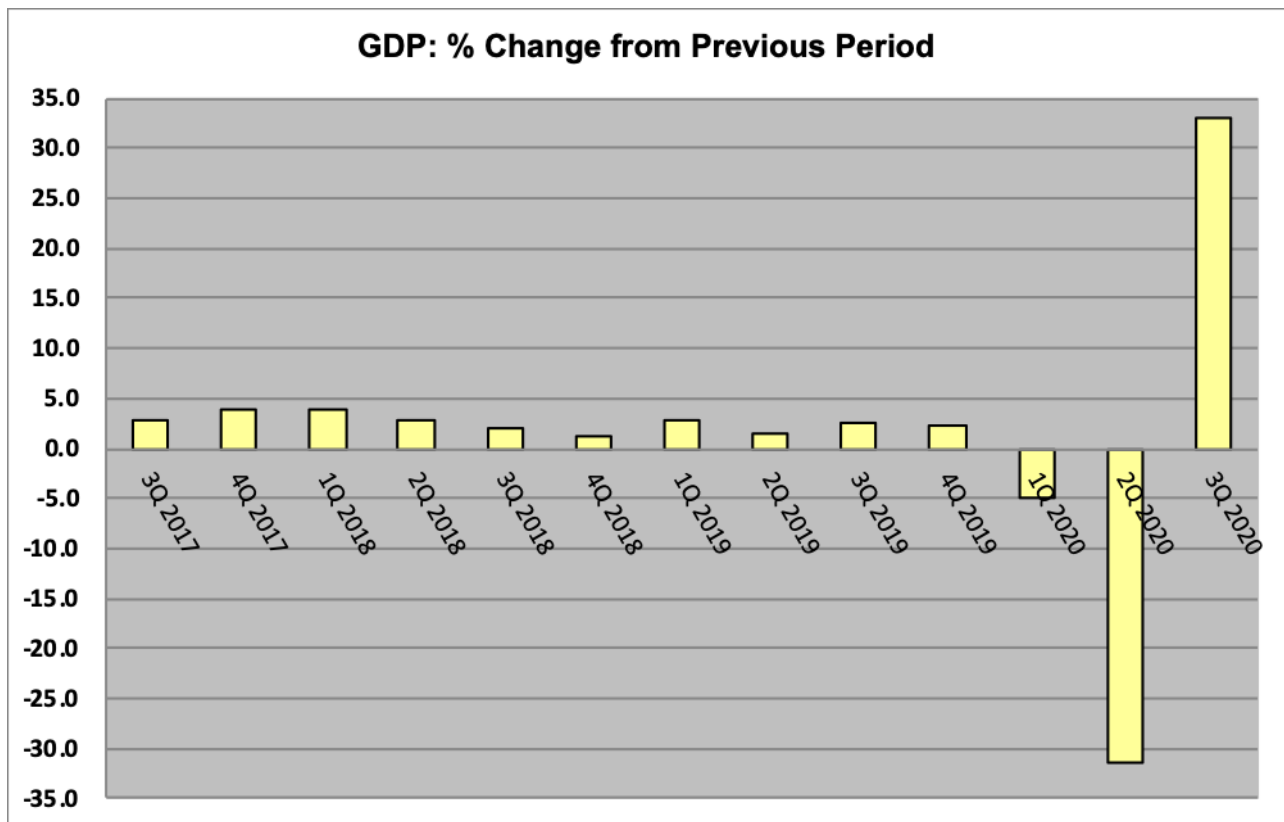
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U.S.-produced tile comprised 32.1% of U.S. ceramic tile consumption by volume through 3Q 2020 and 40.8% by \$ value.⁴

Exports:

U.S. ceramic tile exports through 3Q 2020 were at 23.5 million sq. ft., up 4.4% from 3Q 2019 YTD. The vast majority of these exports were to Canada (71.2%) and Mexico (10.5%).⁵

Economic Highlights:

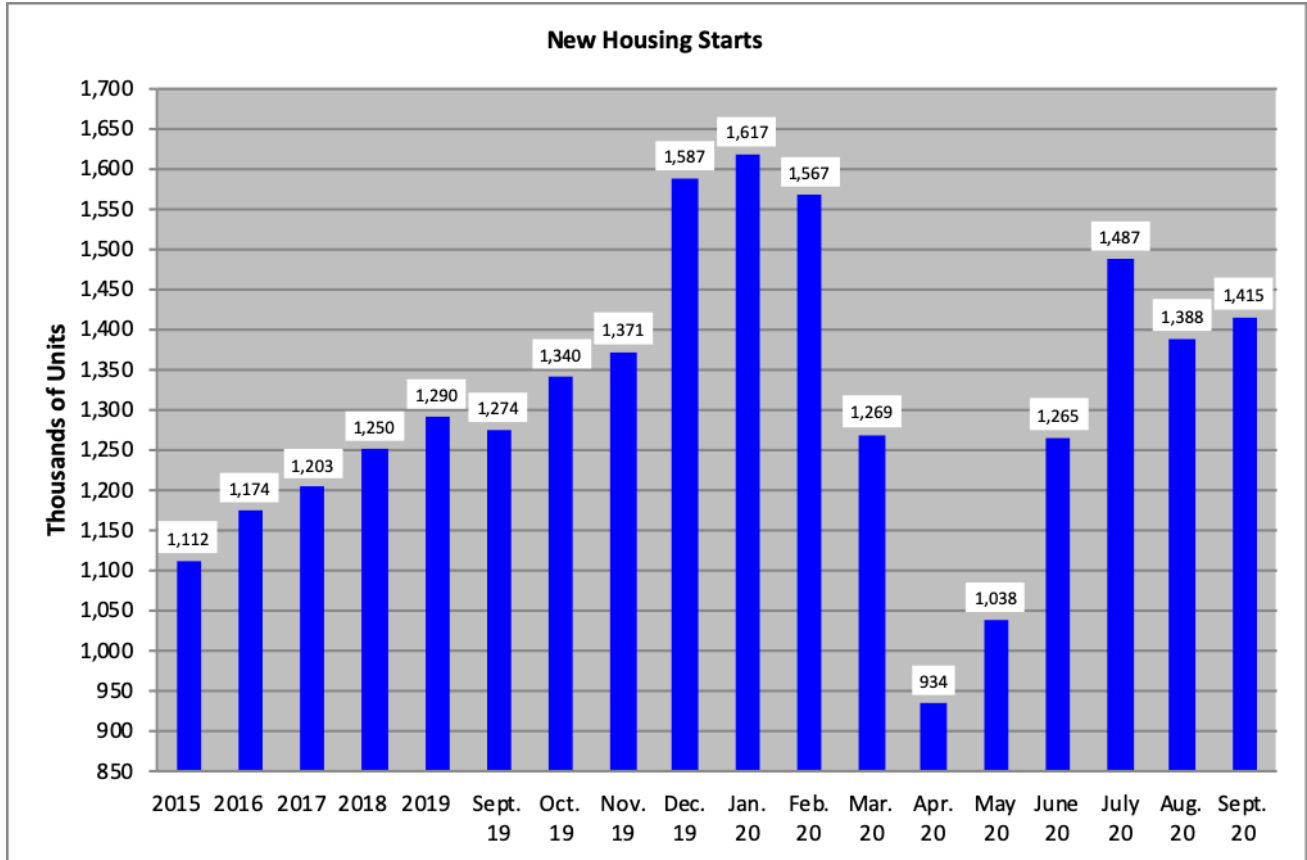


(Source: Bureau of Economic Analysis)

⁴ U.S. Dept. of Commerce & Tile Council of North America

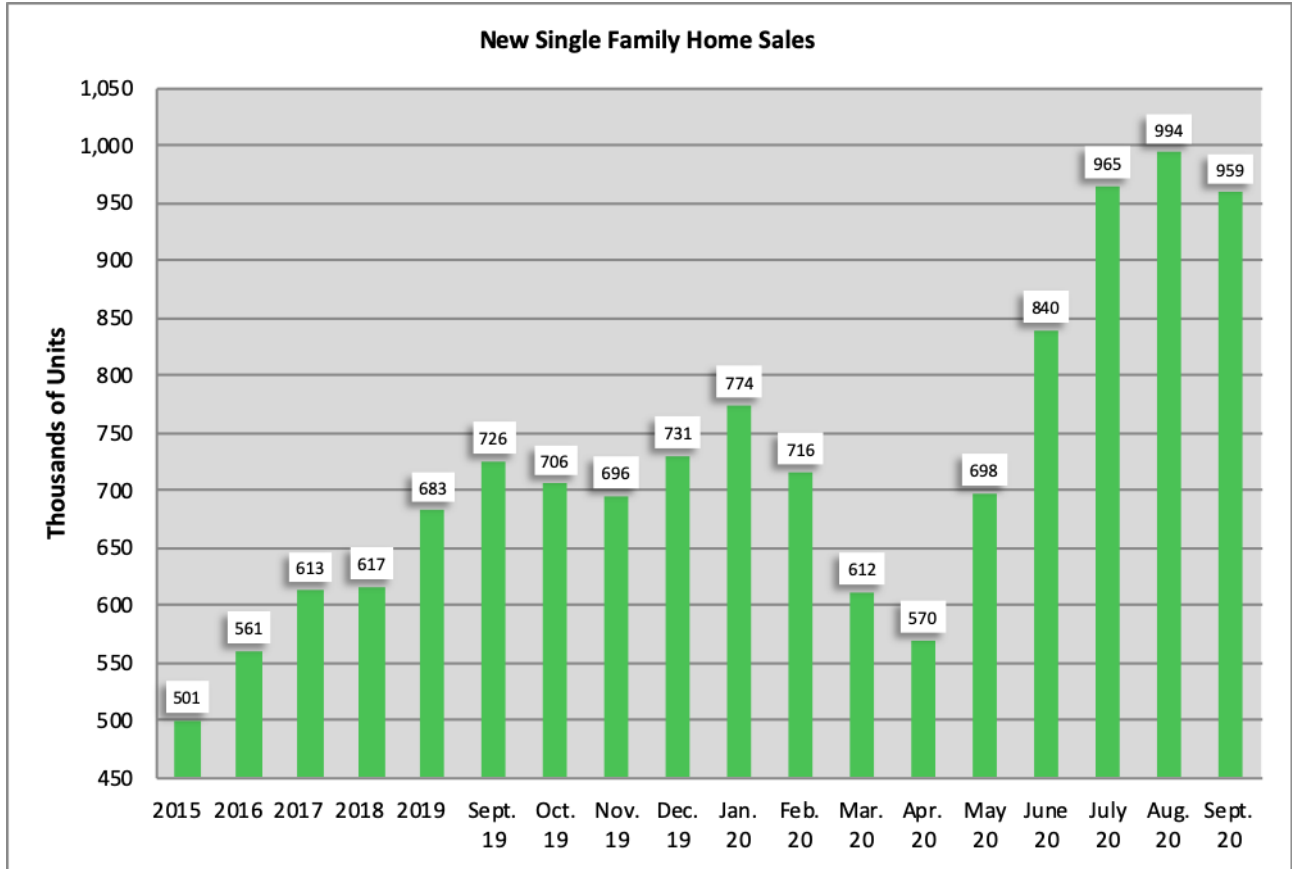
⁵ U.S. Dept. of Commerce





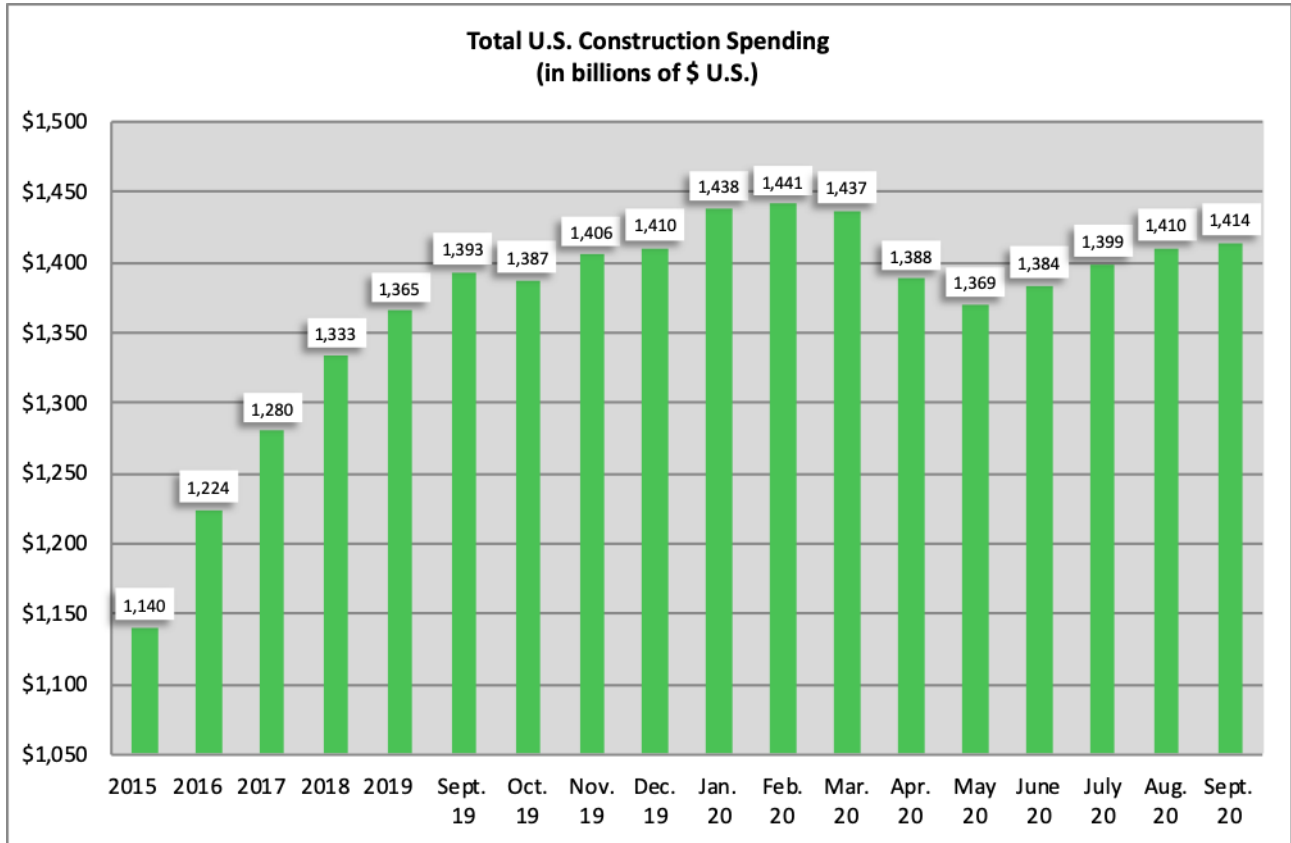
(Source: U.S. Census Bureau)





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About Tile Council of North America (TCNA)

TCNA is a trade association representing manufacturers of ceramic tile, tile installation materials, tile equipment, raw materials and other tile-related products. Established in 1945 as the Tile Council of America (TCA), it became the Tile Council of North America (TCNA) in 2003, reflecting its membership expansion to all of North America.

The Tile Council is recognized for its leadership role in facilitating the development of North American and international industry quality standards to benefit tile consumers. Additionally, TCNA regularly conducts independent research and product testing, works with regulatory, trade, and other government agencies, and publishes installation guidelines, tile standards, economic reports, and promotional literature.

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