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## 2015 Ceramic Tile Industry Update

By Andrew Whitmire, Trade Data Analyst

### U.S. Tile Consumption Overview:

2015 was another year of strong growth for the U.S. ceramic tile market. Supported by gains in the construction and housing markets, as well as low interest rates and falling unemployment, ceramic tile consumption increased for the sixth consecutive year.

U.S. ceramic tile consumption in 2015 was 2.74 billion sq. ft., up 9.9% vs. 2014 (2.49 billion sq. ft.).<sup>1</sup>

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>
2015	897,943	1,881,051	40,718	2,738,276	9.9
2014	816,050	1,711,571	36,996	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

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

<sup>1</sup> U.S. Dept. of Commerce & Tile Council of North America

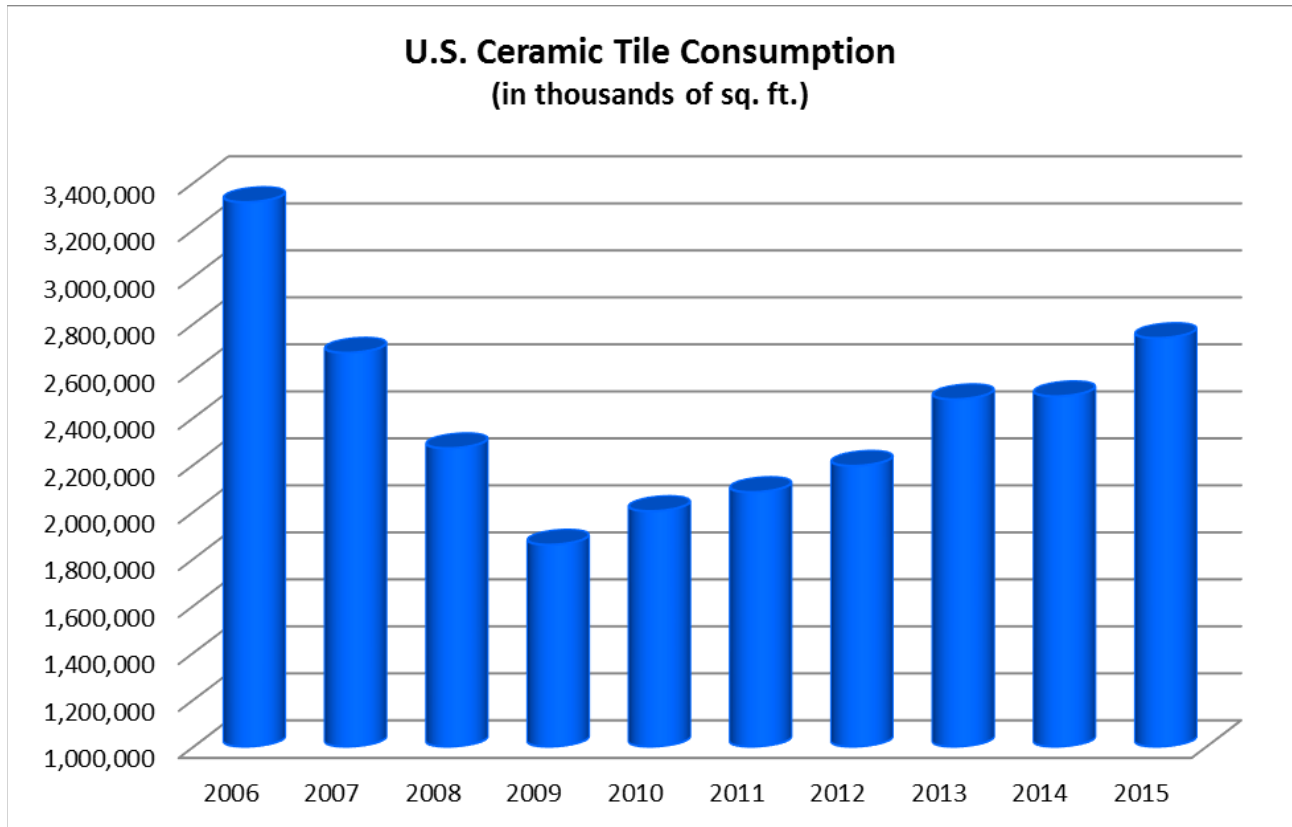
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The chart below shows total U.S. consumption of ceramic tile (in sq. ft.) over the last decade.



**Imports:**

In 2015, 1.88 billion sq. ft. of ceramic tile arrived in the U.S., a 9.9% increase from 2014 (1.71 billion sq. ft.).

Imports in 2015 made up 68.7% of U.S. tile consumption (in sq. ft.), unchanged from the previous year.

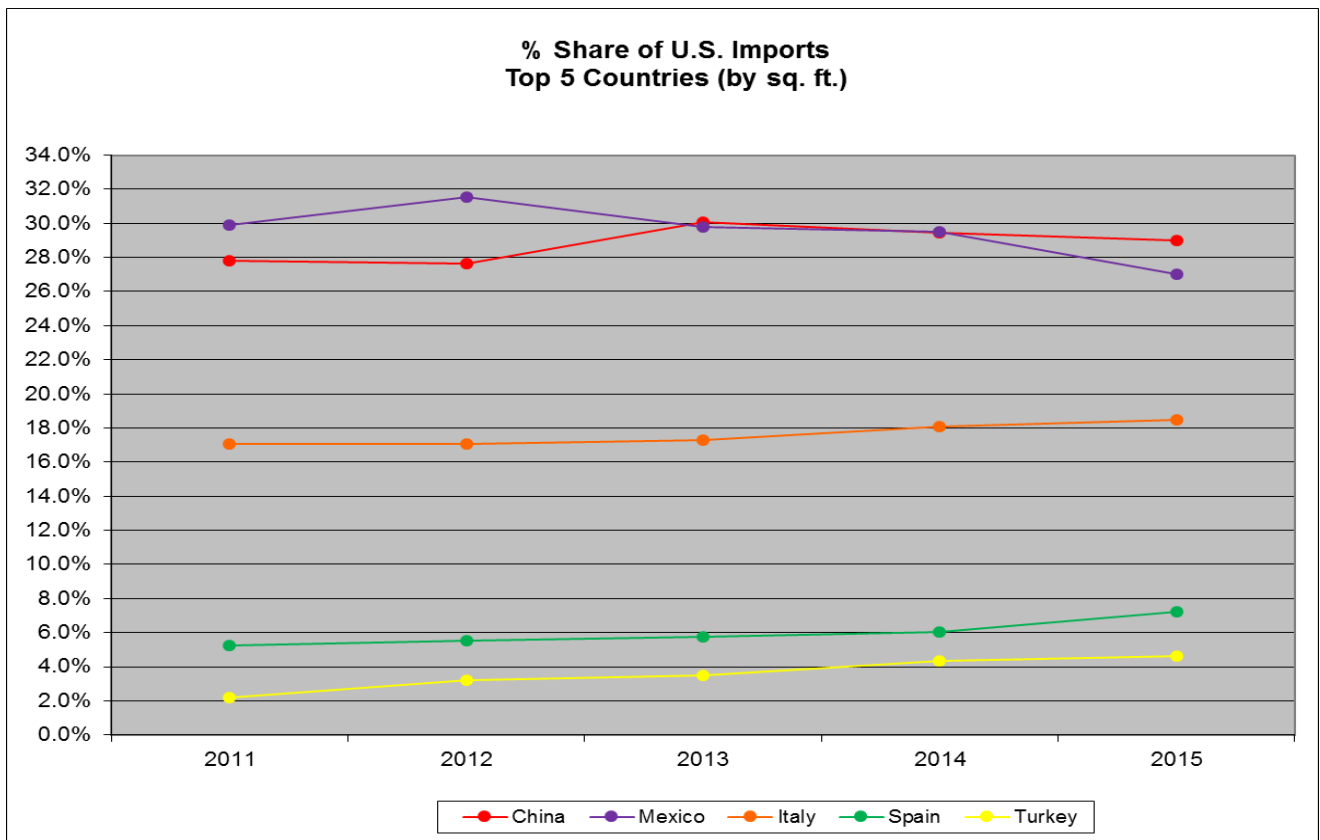
In 2015 China regained the position as largest exporter (in sq. ft.) to the U.S. after Mexico held the top place in 2014. China's share of U.S. imports was 29.0%, followed by Mexico with a



27.0% share of imports, and Italy with an 18.5% share. Spain and Turkey rounded out the top five with a 7.2% and 4.6% share of imports, respectively.<sup>2</sup>

The five countries from which the most tiles were imported in 2015 based on sq. ft. were:

Country	Sq. Ft. 2015	Sq. Ft. 2014	2015/2014 % Change	2014/2013 % Change
China	546,347,967	503,633,907	8.5%	-2.8%
Mexico	508,631,375	505,267,567	0.7%	-1.5%
Italy	348,687,782	309,111,909	12.8%	3.8%
Spain	136,343,525	103,212,414	32.1%	3.7%
Turkey	86,350,910	74,375,403	16.1%	22.2%



<sup>2</sup> U.S. Dept. of Commerce





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Italy remained the largest exporter to the U.S. on a dollar basis in 2015, comprising 34.6% of U.S. imports. China was second with a 26.0% share, and Mexico was third with a 14.3% share.

The five countries from which the most tiles were imported in 2015 based on total U.S. \$ value (including duty, freight, and insurance) were:

Country	Total Val 2015 (in \$)	Total Val 2014 (in \$)	2015/2014 % Change	2014/2013 % Change
Italy	695,055,435	634,888,206	9.5%	8.7%
China	521,010,646	469,208,103	11.0%	4.7%
Mexico	287,867,792	300,680,754	-4.3%	0.4%
Spain	194,031,273	161,599,182	20.1%	13.0%
Turkey	95,315,611	79,781,165	19.5%	32.2%
<b>All Countries</b>	<b>2,006,173,353</b>	<b>1,822,777,268</b>	<b>10.1%</b>	<b>5.7%</b>

The average values of tile<sup>3</sup> from the five countries (based on sq. ft.) from which the most tiles were imported in 2015 were:

Country	Sq. Ft. 2015	Tot Val. 2015 (in \$)	Value per Sq. Ft. 2015	Value per Sq. Ft. 2014	Value per Sq. Ft. 2013
China	546,347,967	521,010,646	\$0.95	\$0.93	\$0.86
Mexico	508,631,375	287,867,792	\$0.57	\$0.60	\$0.58
Italy	348,687,782	695,055,435	\$1.99	\$2.05	\$1.96
Spain	136,343,525	194,031,273	\$1.42	\$1.57	\$1.44
Turkey	86,350,910	95,315,611	\$1.10	\$1.07	\$0.99
<b>All Countries</b>	<b>1,881,051,298</b>	<b>2,006,173,353</b>	<b>\$1.07</b>	<b>\$1.06</b>	<b>\$1.00</b>

### U.S. Shipments:

While imports comprised 68.7% of the U.S. market (in sq. ft.) through 2015, U.S. produced tile has made significant inroads over the last decade; as recently as 2006 imports comprised 82.4% of the market (in sq. ft.).

<sup>3</sup> 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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Increased domestic capacity has certainly contributed to the growth in consumption of U.S. produced tile. In fact 2015 was a record year for U.S. manufacturers, as an all-time high of 857.2 million sq. ft. (up 10.0% from 2014) of ceramic tile were shipped domestically.

In dollar value, domestic shipments (less exports) in 2015 were \$1.26 billion, up 9.4% vs. 2014 (\$1.15 billion).<sup>4</sup>

### **Exports:**

U.S. ceramic tile exports in 2015 were 40.7 million sq. ft., up 10.1% vs. 2014. The vast majority of these exports (in sq. ft.) were to Canada (57.1%) and Mexico (18.8%).<sup>5</sup>

### **Economic Highlights:**

- In the housing market new home starts increased for the sixth year in a row, reaching their highest annual level since 2007. The 1.11 million units started in 2015 represented a 10.8% increase from the previous year.<sup>6</sup>
- New single family home sales rose for the fourth straight year and were at a total of 501,000 units, up 14.5% vs. 2014.<sup>7</sup> Despite the recent growth new home sales were still less than half of what they were just ten years ago.<sup>8</sup>
- Foreclosures, a major indicator of the residential market's health, were down for the fifth straight year to their lowest annual total since 2006. The 1.08 million foreclosure filings on U.S. properties in 2015 represented a 3.0% decline from 2014 and a 62.3% decline from the peak foreclosure year (2010).<sup>9</sup>

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<sup>4</sup> Tile Council of North America

<sup>5</sup> U.S. Dept. of Commerce

<sup>6</sup> U.S. Census Bureau

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

<sup>8</sup> U.S. Census Bureau

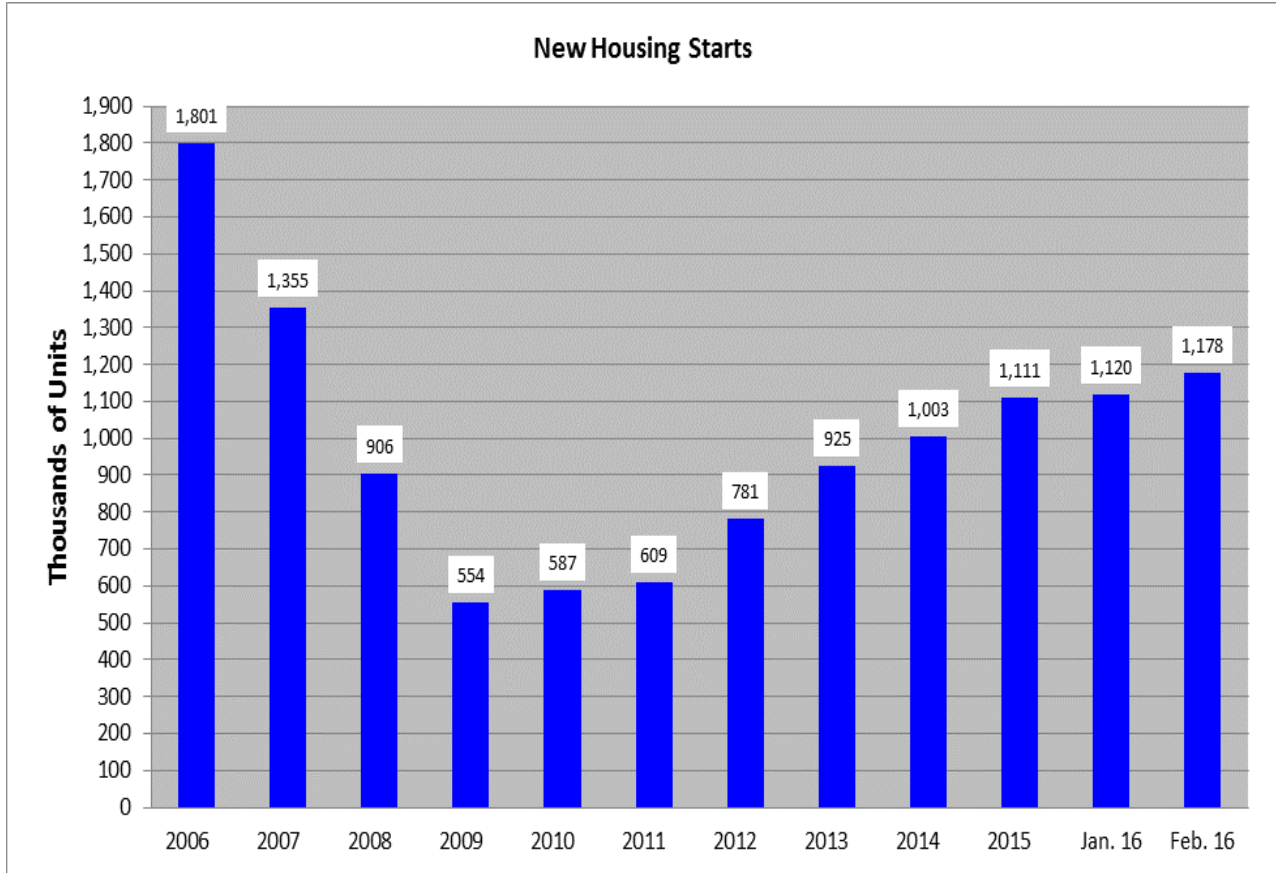
<sup>9</sup> RealtyTrac

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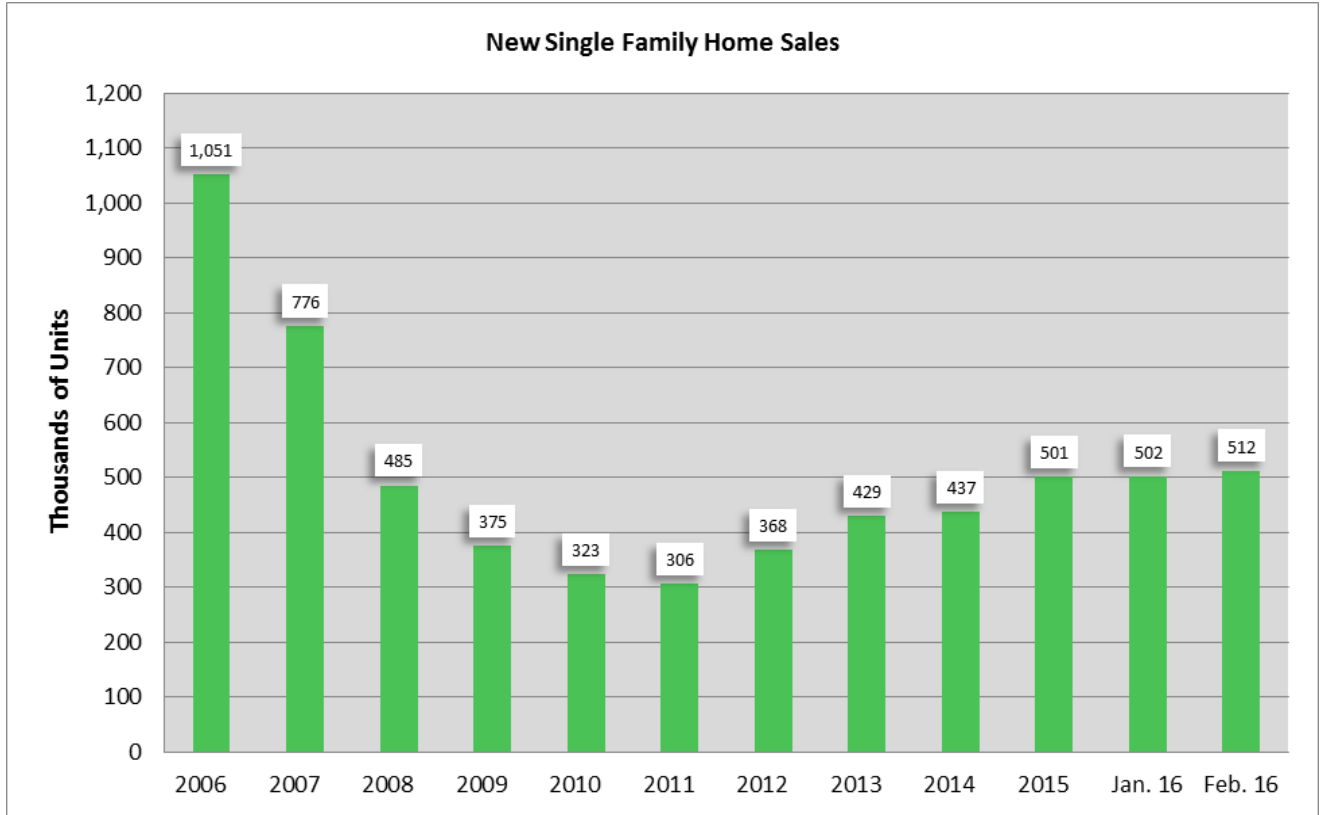
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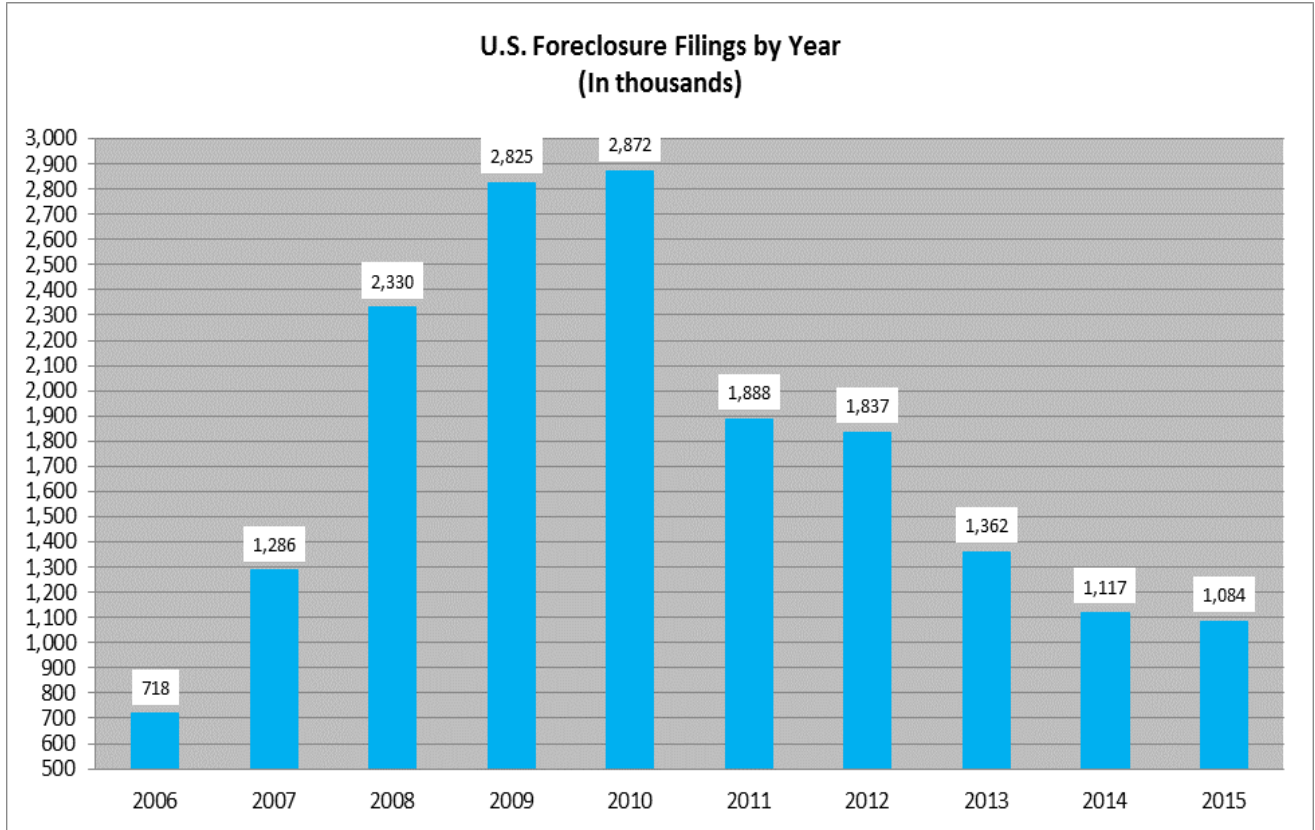


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### **About TCNA:**

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 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, offers professional training, and publishes industry-consensus guidelines and standards, economic reports, and promotional literature.

TCNA regularly publishes U.S. ceramic tile market reports compiled from TCNA members' proprietary domestic shipment data and import and export data consolidated from U.S. Census Bureau sources. Additionally, TCNA publishes reports on the Canadian ceramic tile market using data obtained from Statistics Canada.

These reports are regularly updated and reflect the latest information and any revisions provided by TCNA members and government sources.

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