

## 2Q 2020 U.S. Ceramic Tile Industry Update

### U.S. Tile Consumption Overview:

U.S. ceramic tile consumption through 2Q 2020 was 1.24 billion sq. ft., down 17.1% vs. 2Q 2019 YTD.<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>
2Q 2020 YTD	444,911	815,821	15,788	1,244,944	-17.1**
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 2Q 2019 YTD

### Imports:

Through 2Q 2020, 815.8 million sq. ft. of ceramic tile arrived in the U.S., down 22.2% from 2Q 2019 YTD.

Imports through 2Q 2020 comprised 65.5% of U.S. tile consumption (by volume), down from 70.6% in 2019.

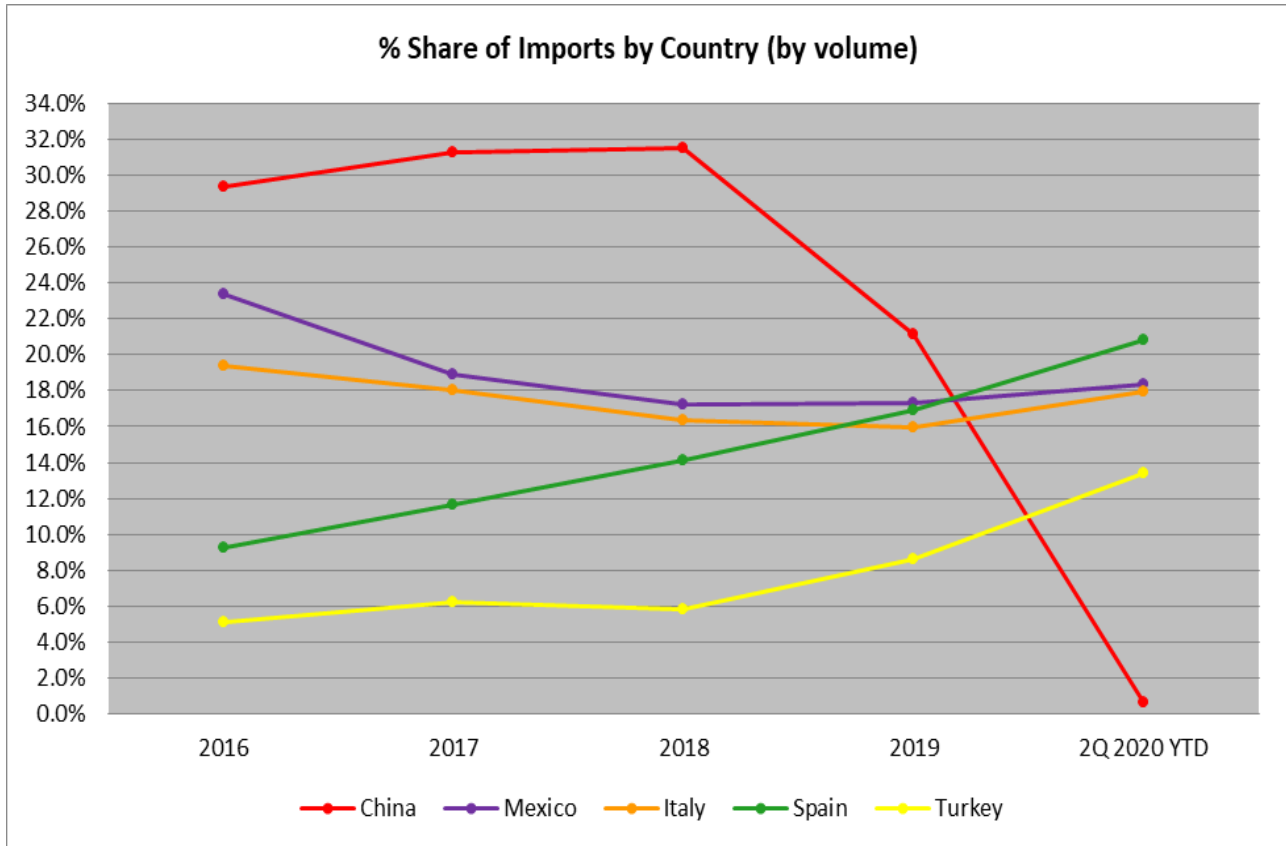
Spain was the largest exporter to the U.S. through 2Q 2020 with a 20.9% share of U.S. imports (by volume), followed by Mexico (18.3%), and Italy (18.0%).<sup>2</sup>

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

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



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 2Q 2020 based on volume were:

Country	Sq. Ft. 2Q 2020 YTD	Sq. Ft. 2Q 2019 YTD	2020/2019 % Change	2019/2018 % Change
Spain	170,231,588	170,143,001	0.1%	9.2%
Mexico	149,531,802	200,994,790	-25.6%	3.2%
Italy	146,804,184	160,880,064	-8.7%	-11.7%
Turkey	109,034,634	59,606,316	82.9%	-7.4%
Brazil	98,360,613	99,128,543	-0.8%	51.0%
<b>All Countries</b>	<b>815,820,785</b>	<b>1,048,198,175</b>	<b>-22.2%</b>	<b>-3.4%</b>



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Italy remained the largest exporter to the U.S. on a dollar basis (CIF + duty) through 2Q 2020, comprising 33.4% of U.S. imports, followed by Spain (23.1% share), and Mexico (11.5% share).

The five countries from which the most tiles were imported through 2Q 2020 based on total U.S. \$ value (CIF + duty) were:

Country	Total \$ Value 2Q 2020 YTD	Total \$ Value 2Q 2019 YTD	2020/2019 % Change	2019/2018 % Change
Italy	285,914,383	320,879,009	-10.9%	-10.8%
Spain	197,607,375	208,836,544	-5.4%	16.0%
Mexico	98,427,508	124,477,390	-20.9%	3.6%
Turkey	82,750,849	47,012,919	76.0%	-16.0%
Brazil	64,652,414	58,866,001	9.8%	40.0%
<b>All Countries</b>	<b>855,338,418</b>	<b>1,104,693,114</b>	<b>-22.6%</b>	<b>-2.4%</b>

The average values of tile<sup>3</sup> (CIF + duty) from the five countries from which the most tiles were imported (based on volume) through 2Q 2020 were:

Country	Sq. Ft. 2Q 2020 YTD	Total \$ Value 2Q 2020 YTD	\$ Val/Sq. Ft. 2Q 2020 YTD	\$ Val/Sq. Ft. 2Q 2019 YTD
Spain	170,231,588	197,607,375	\$1.16	\$1.23
Mexico	149,531,802	98,427,508	\$0.66	\$0.62
Italy	146,804,184	285,914,383	\$1.95	\$1.99
Turkey	109,034,634	82,750,849	\$0.76	\$0.79
Brazil	98,360,613	64,652,414	\$0.66	\$0.59
<b>All Countries</b>	<b>815,820,785</b>	<b>855,338,418</b>	<b>\$1.05</b>	<b>\$1.05</b>

### U.S. Shipments:

U.S. shipments (less exports) through 2Q 2020 were 429.1 million sq. ft., down 5.5% vs. 2Q 2019 YTD.

The \$ value/sq. ft. of U.S. shipments (less exports) through 2Q 2020 was \$1.49, down from \$1.53 (2Q 2019 YTD).

<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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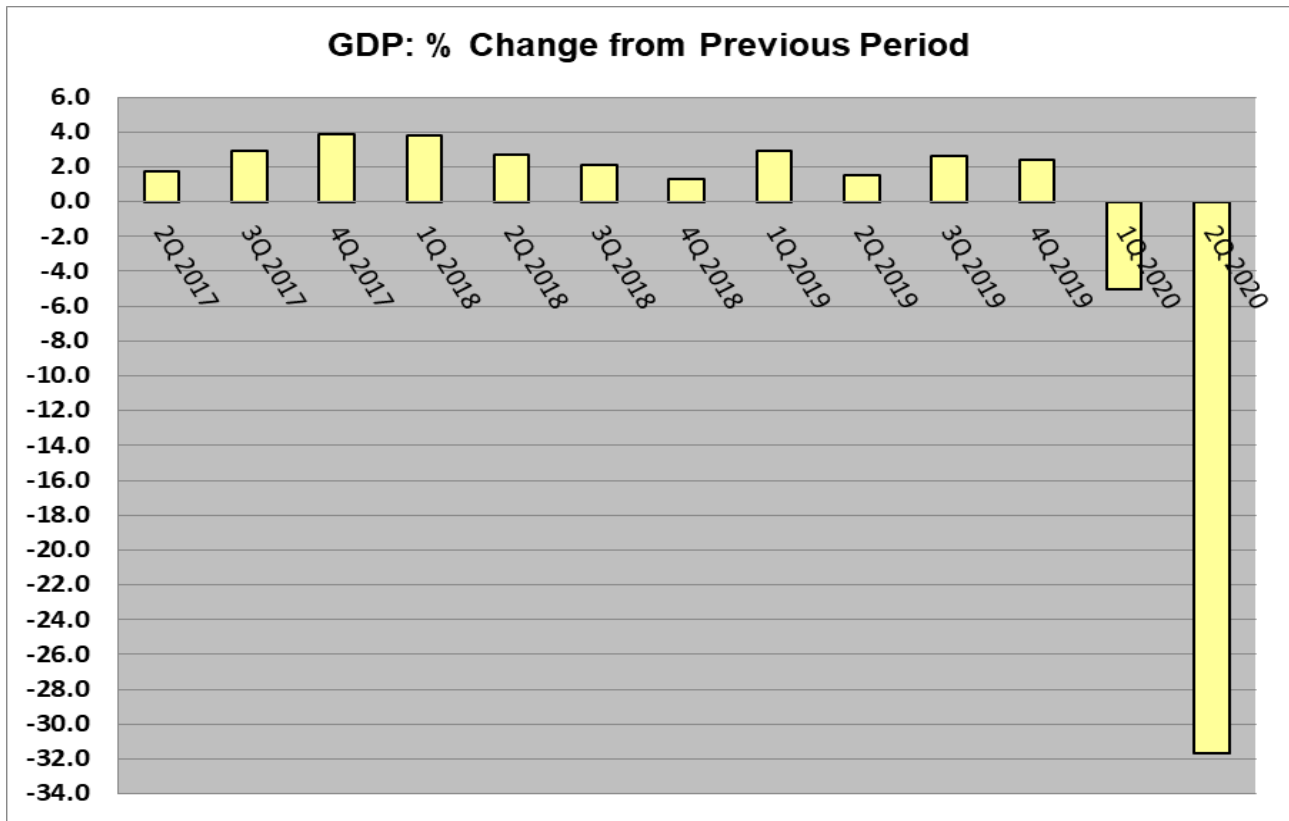
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U.S.-produced tile comprised 34.5% of the U.S. ceramic tile market by volume through 2Q 2020 and 42.8% by \$ value.<sup>4</sup>

**Exports:**

U.S. ceramic tile exports through 2Q 2020 rose 2.5% (by volume) from 2Q 2019 YTD. The vast majority of these exports were to Canada (71.9%) and Mexico (13.0%).<sup>5</sup>

**Economic Highlights:**

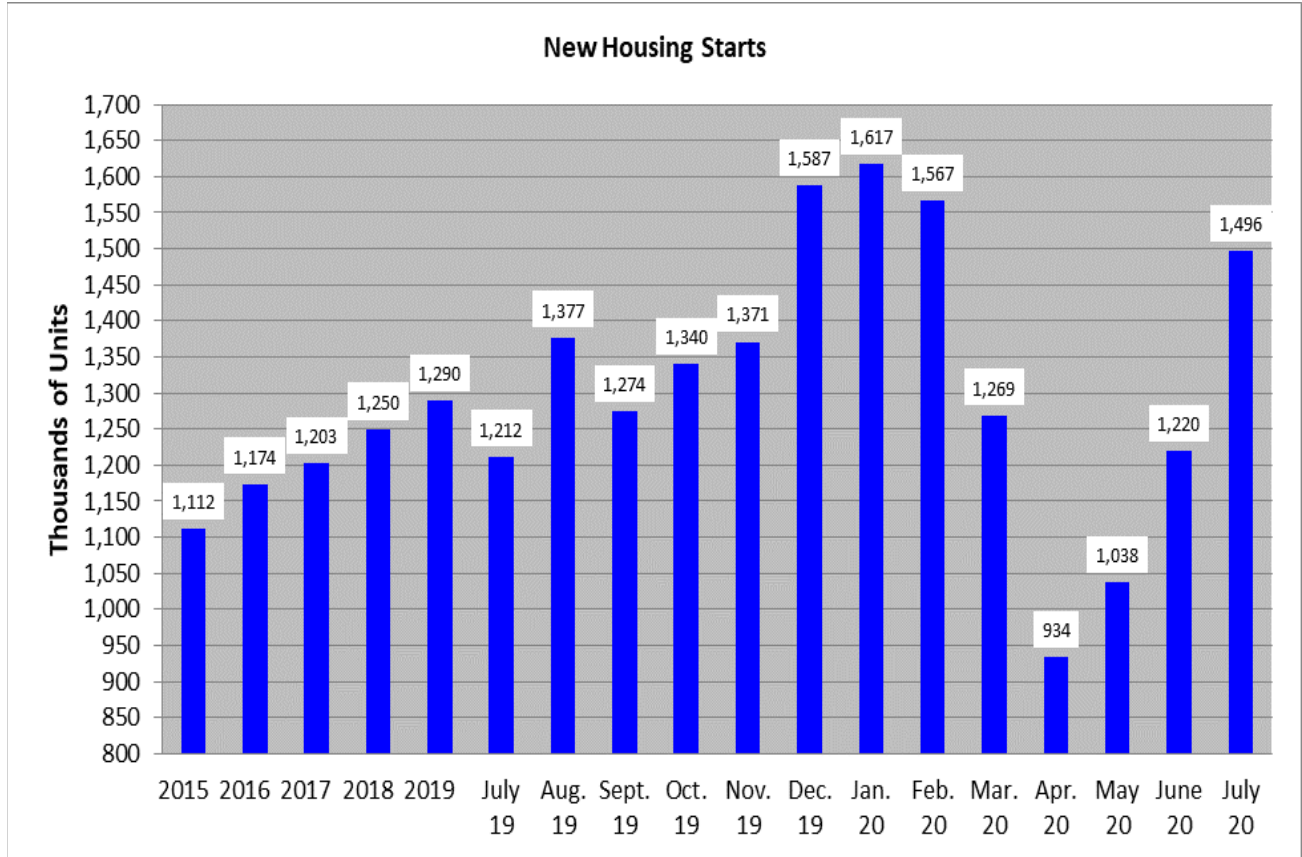


(Source: Bureau of Economic Analysis)

<sup>4</sup> U.S. Dept. of Commerce & Tile Council of North America

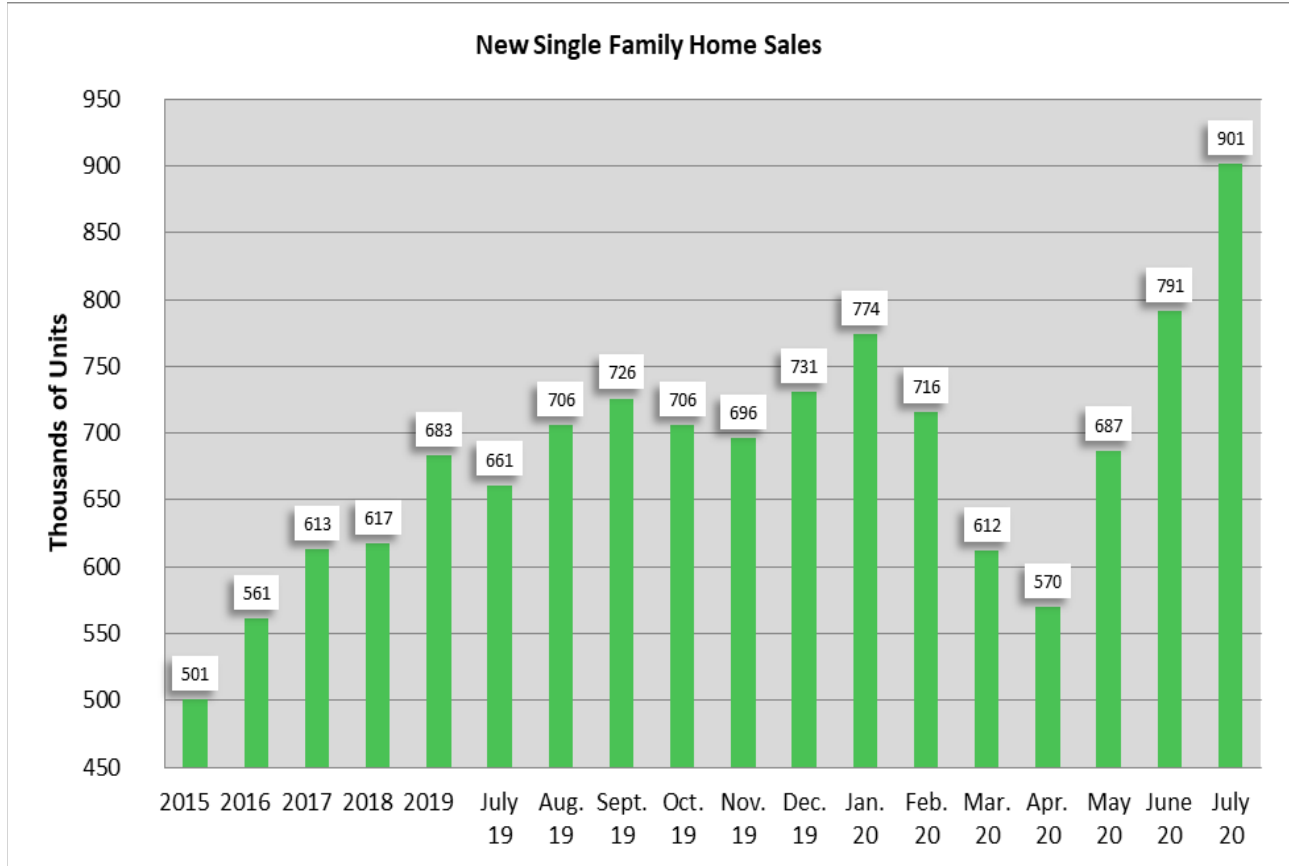
<sup>5</sup> U.S. Dept. of Commerce





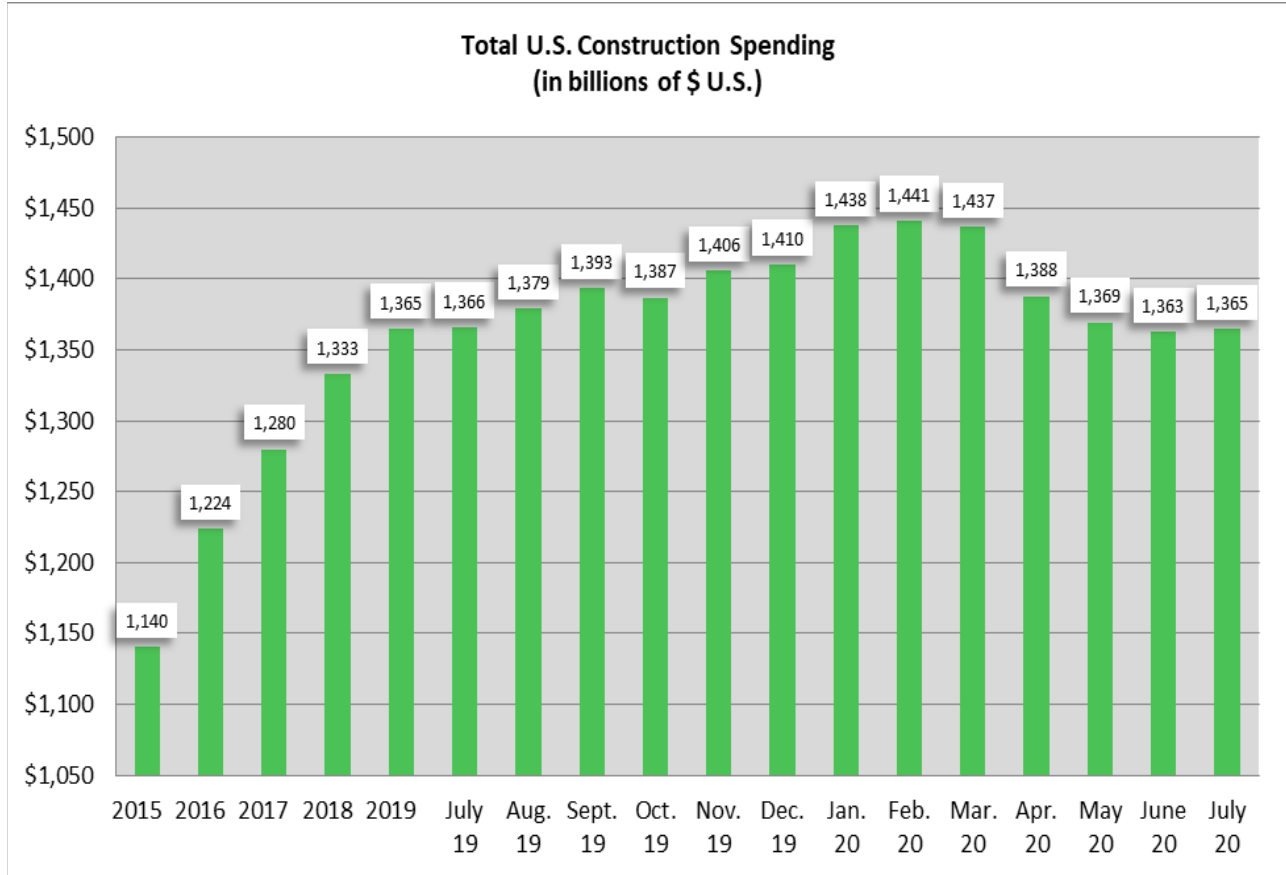
(Source: U.S. Census Bureau)





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