

3Q 2021 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption rose 15.3% by volume 3Q 2021 YTD compared to the same timeframe in 2020.¹

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 vs. Previous Year</u>
3Q 2021 YTD	693,217	1,677,939	28,020	2,343,136	15.3**
2020	898,533	1,966,443	31,009	2,833,967	-3.6
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

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

**Note: Change vs. 3Q 2020 YTD

Imports:

The U.S. imported 1.68 billion sq. ft. of ceramic tile 3Q 2021 YTD, up 21.5% from 3Q 2020 YTD.²

Imports made up 71.6% of U.S. tile consumption by volume through 3Q 2021, up from 69.4% in 2020.

Spain remained the largest exporter to the U.S. by volume through 3Q 2021 with a 21.9% share of U.S. imports, followed by Italy (17.6% share of imports) and Mexico (16.7%).³

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

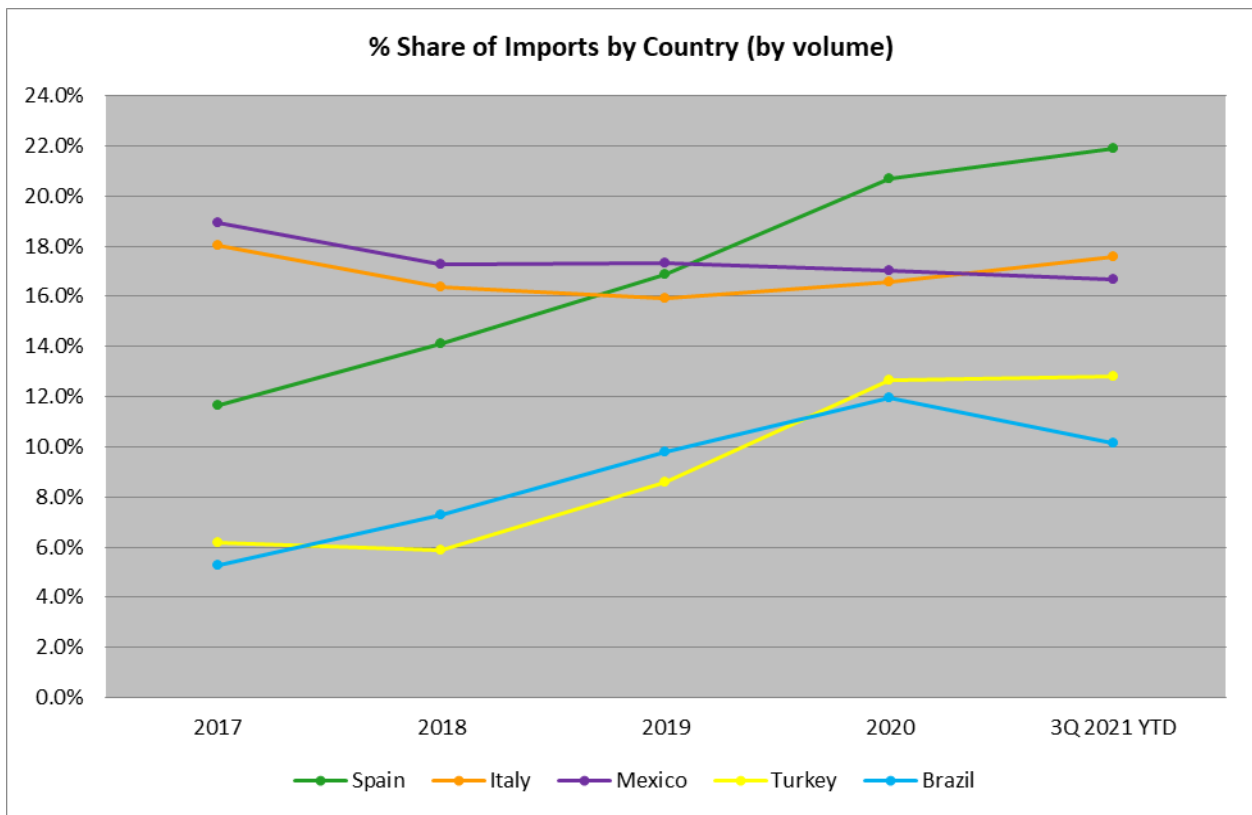
² U.S. Dept. of Commerce

³ U.S. Dept. of Commerce



The five countries from which the most tiles were imported through 3Q 2021, based on volume, were:

Country	Sq. Ft. 3Q 2021 YTD	Sq. Ft. 3Q 2020 YTD	% Change
Spain	367,682,855	285,501,669	28.8%
Italy	295,079,537	237,523,788	24.2%
Mexico	279,766,808	242,830,375	15.2%
Turkey	215,043,663	181,269,569	18.6%
Brazil	169,791,118	167,240,028	1.5%
All Countries	1,677,938,612	1,381,193,877	21.5%





Website: www.tcnatile.com . Literature: literature@tileusa.com

By dollar value (CIF + duty) Italy remained the largest exporter to the U.S. (3Q 2021 YTD), comprising 32.1% of U.S. imports, followed by Spain (25.0%) and Mexico (10.2%).

The five countries from which the most tiles were imported 3Q 2021 YTD, based on total U.S. dollar value (CIF + duty), were:

Country	\$ Val 3Q 2021 YTD	\$ Val 3Q 2020 YTD	% Change
Italy	594,976,419	457,640,278	30.0%
Spain	463,180,221	326,988,147	41.7%
Mexico	188,484,861	161,266,282	16.9%
Turkey	160,860,267	136,020,557	18.3%
India	125,312,563	82,006,418	52.8%
All Countries	1,855,774,914	1,415,438,656	31.1%

The average values of tile⁴ (including CIF + duty) from the five countries from which the most tiles were imported by volume 3Q 2021 YTD were:

Country	Sq. Ft. 3Q 2021 YTD	\$ Val 3Q 2021 YTD	Val/Sq. Ft. 3Q 2021 YTD	Val/Sq. Ft. 3Q 2020 YTD
Spain	367,682,855	463,180,221	\$1.26	\$1.15
Italy	295,079,537	594,976,419	\$2.02	\$1.93
Mexico	279,766,808	188,484,861	\$0.67	\$0.66
Turkey	215,043,663	160,860,267	\$0.75	\$0.75
Brazil	169,791,118	117,102,821	\$0.69	\$0.65
All Countries	1,677,938,612	1,855,774,914	\$1.11	\$1.02

U.S. Shipments:

U.S. shipments (less exports) 3Q 2021 YTD were 665.2 million sq. ft., up 2.2% vs. 3Q 2020 YTD.

In \$ value, 3Q 2021 YTD U.S. FOB factory sales were \$1,026,598,210, up 5.6% vs. 3Q 2020 YTD.

⁴ 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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The \$ value/sq. ft. of U.S. shipments (less exports) 3Q 2021 YTD was \$1.54, up from \$1.49 (3Q 2020 YTD).⁵

U.S. Exports:

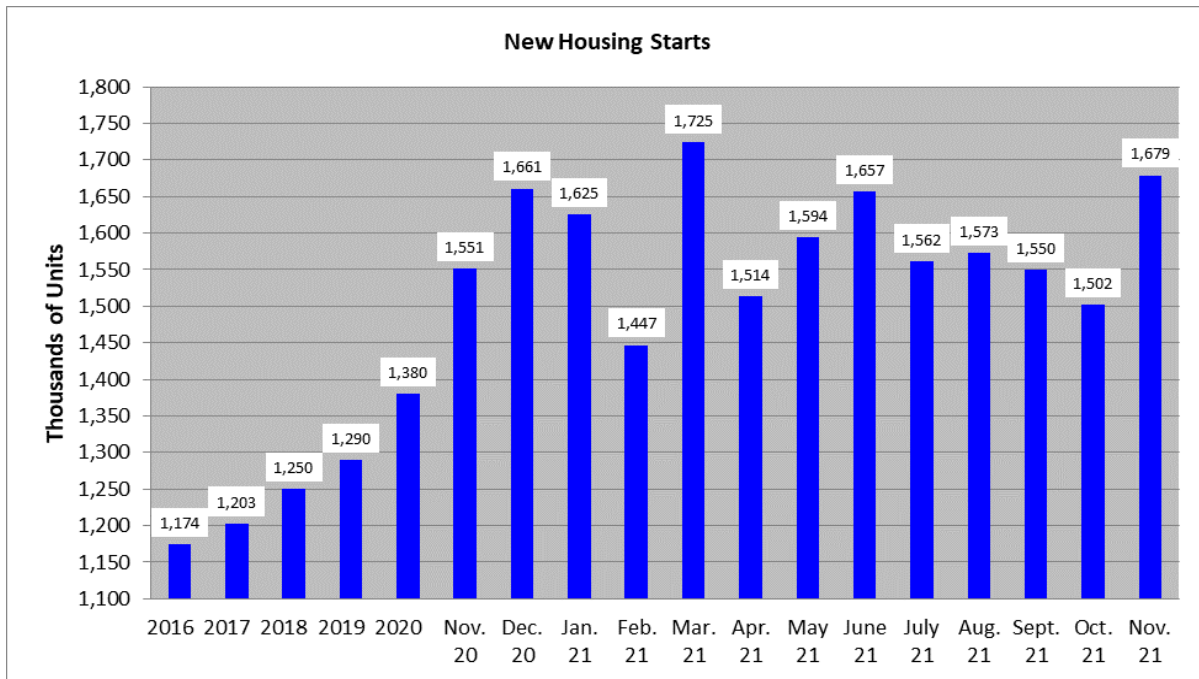
U.S. ceramic tile exports 3Q 2021 YTD were 28.0 million sq. ft., up 19.2% vs. 3Q 2020 YTD.

The largest recipients of U.S. exports by volume were Canada (71.3%) and Mexico (14.6%).⁶

Housing Market Highlights:

New Home Starts

Nov. 2021 new home starts were at a seasonally-adjusted annual rate of 1,679,000 units, an 11.8% increase from the previous month and an 8.3% increase from Nov. 2020.⁷



⁵ Tile Council of North America

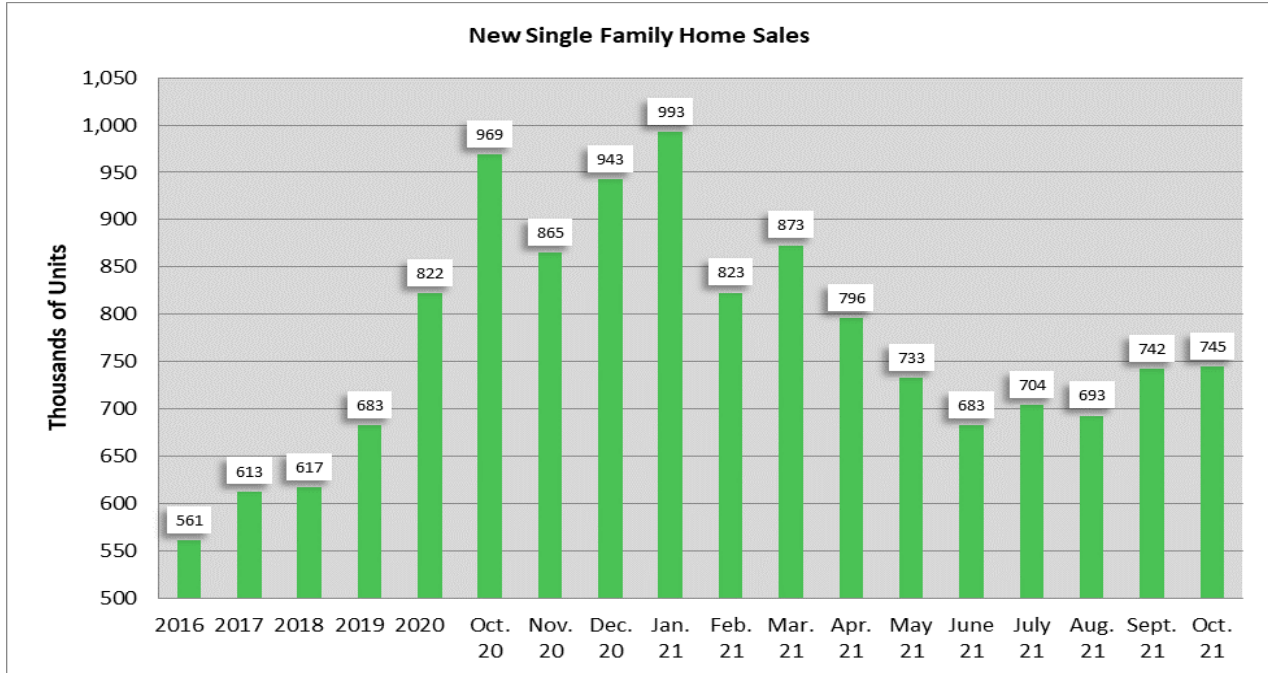
⁶ U.S. Dept. of Commerce

⁷ U.S. Census Bureau



New Single Family Home Sales

Oct. 2021 new one-family home sales were at a seasonally-adjusted annual rate of 745,000 units, a 0.4% increase from Sept. 2021 but a 23.1% decrease from Oct. 2020.⁸



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.

⁸ U.S. Census Bureau

