

4Q 2020 U.S. Ceramic Tile Industry Update

U.S. Ceramic Tile Consumption Overview:

U.S. ceramic tile consumption in 2020 was 2.84 billion sq. ft., down 3.5% from the previous year.¹

The following table shows U.S. ceramic tile shipments, imports, exports, and total consumption in thousands of sq. ft.

<u>Year</u>	<u>U.S. Ship. (incl. Exports)</u>	<u>Imports</u>	<u>Exports</u>	<u>Total Consumption*</u>	<u>% Change in Consumption vs. Previous Year</u>
2020	902,290	1,966,443	31,009	2,837,724	-3.5
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

Imports:

In 2020, 1.97 billion sq. ft. of ceramic tile arrived in the U.S., down 5.3% from 2019 and the lowest total since 2015.

Imports comprised 69.3% of U.S. tile consumption by volume in 2020, down from 70.6% the previous year.

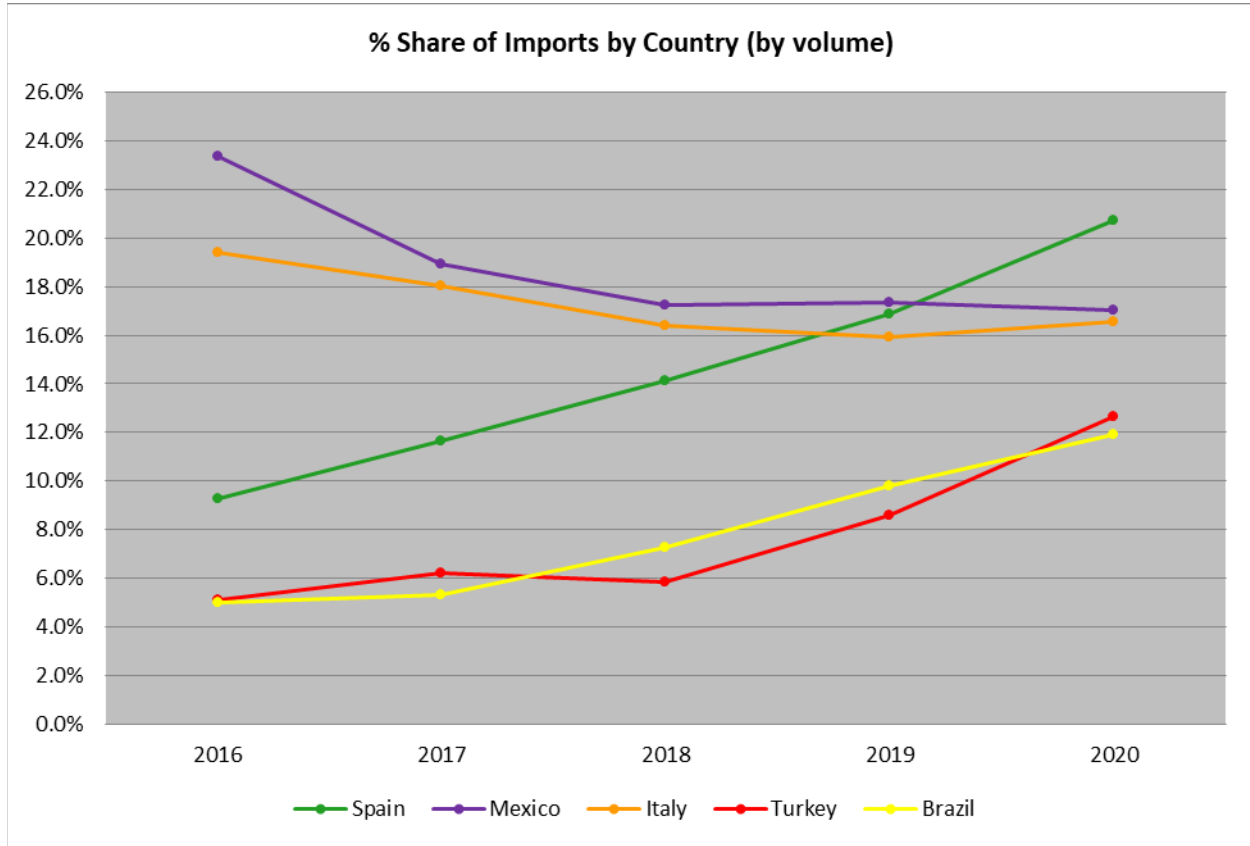
Spain was the largest exporter to the U.S. in 2020 with a 20.7% share of U.S. imports by volume, followed by Mexico (17.0%), and Italy (16.6%).²

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

² U.S. Dept. of Commerce



The following chart shows the % share of U.S. imports by volume for the five countries that exported the most tile to the U.S. in 2020.



The five countries from which the most tiles were imported in 2020 based on volume were:

Country	Sq. Ft. 2020	Sq. Ft. 2019	2020/2019 % Change
Spain	407,249,860	350,769,921	16.1%
Mexico	335,246,651	360,042,481	-6.9%
Italy	325,939,270	331,101,114	-1.6%
Turkey	248,851,082	178,794,881	39.2%
Brazil	234,794,244	203,376,617	15.4%
All Countries	1,966,443,251	2,077,038,050	-5.3%





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On a dollar basis (CIF + duty) Italy remained the largest exporter to the U.S. in 2020, comprising 31.4% of U.S. imports, followed by Spain with a 23.4% share and Mexico 11.2% share.

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

Country	Total Val 2020	Total Val 2019	2020/2019 % Change
Italy	628,564,234	656,168,942	-4.2%
Spain	468,556,063	443,786,983	5.6%
Mexico	223,989,682	225,697,007	-0.8%
Turkey	187,703,524	128,290,114	46.3%
Brazil	150,568,515	123,931,216	21.5%
All Countries	2,002,787,363	2,213,155,469	-9.5%

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

Country	Val/Sq. Ft. 2020	Val/Sq. Ft. 2019
Spain	\$1.15	\$1.27
Mexico	\$0.67	\$0.63
Italy	\$1.93	\$1.98
Turkey	\$0.75	\$0.72
Brazil	\$0.64	\$0.61
All Countries	\$1.02	\$1.07

U.S. Shipments:

U.S. shipments (less exports) last year were 871.3 million sq. ft., up 0.9% vs. 2019.

The per unit value of domestic shipments (less exports) decreased from \$1.55/sq. ft. in 2019 to \$1.49/sq. ft. in 2020.

U.S. shipments comprised 30.7% of total U.S. consumption by volume in 2020, up from 29.4% the previous year and their highest market share since 2017.⁴

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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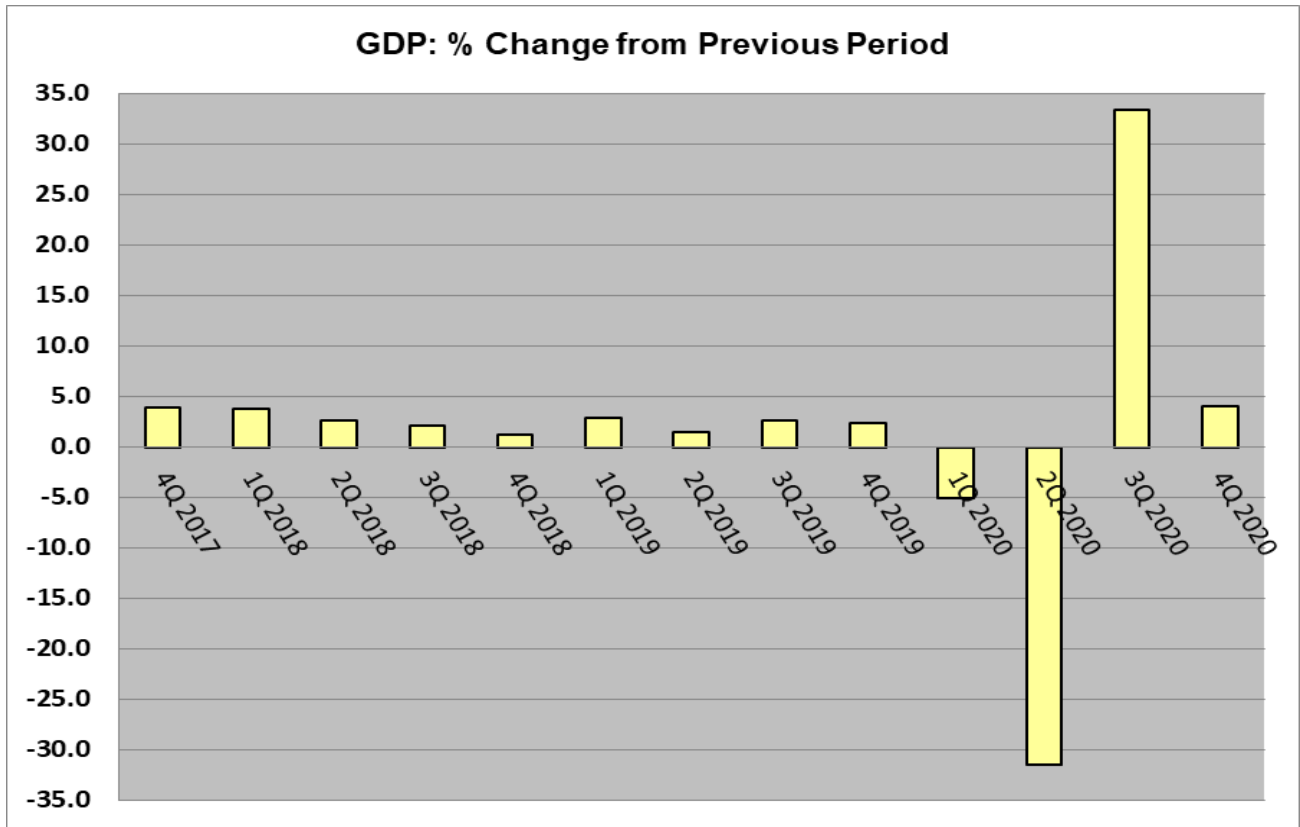


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Exports:

U.S. ceramic tile exports were 31.0 million sq. ft. in 2020, a 2.4% decline from the preceding year. The two largest recipients of these exports were Canada (73.4%) and Mexico (10.2%).⁵

Economic Highlights:

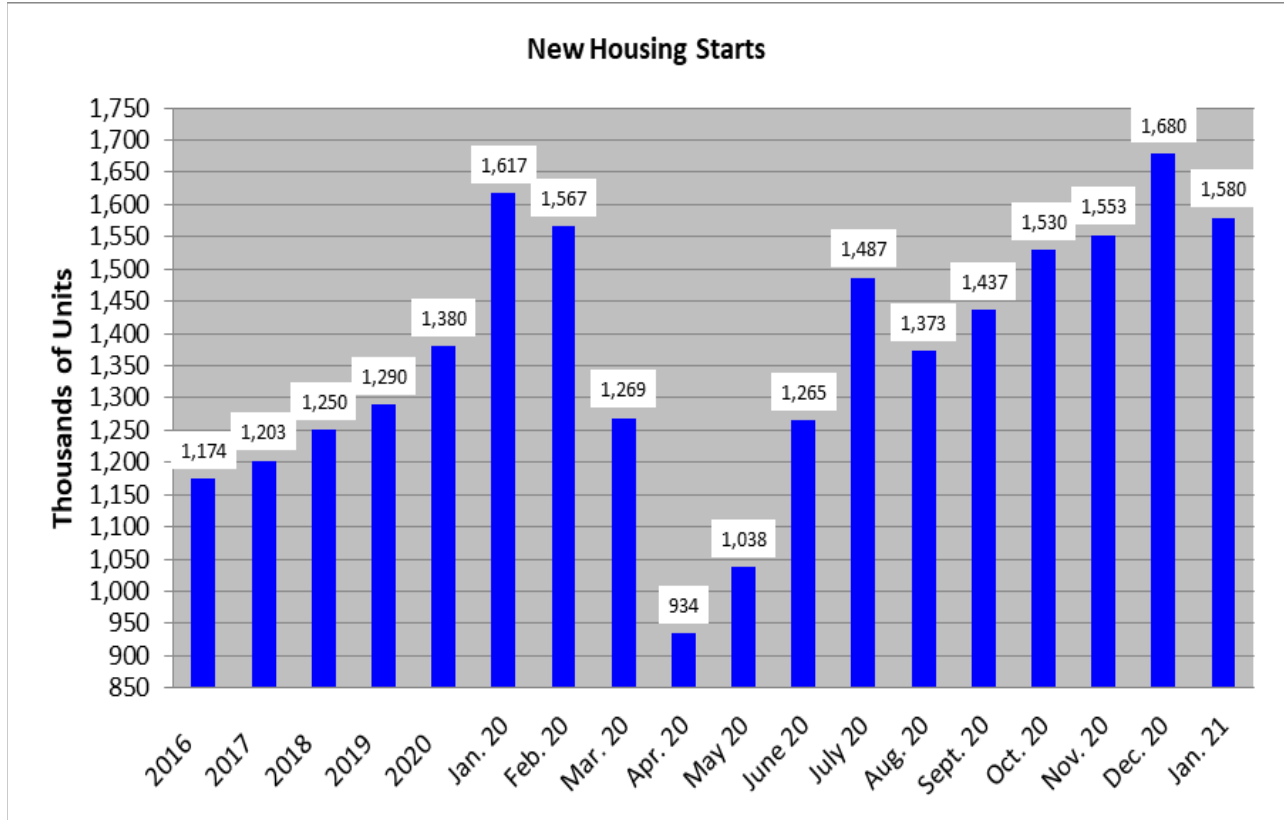


(Source: Bureau of Economic Analysis)

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

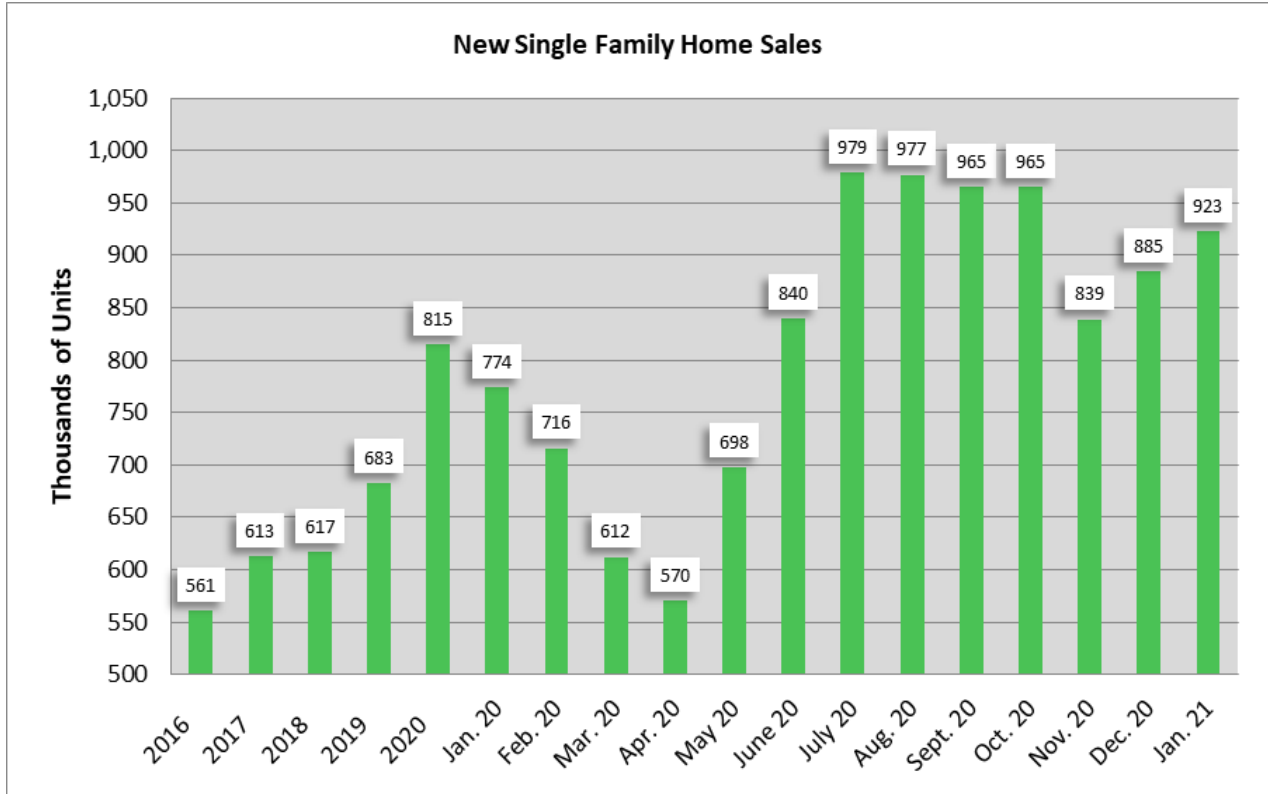
⁵ U.S. Dept. of Commerce





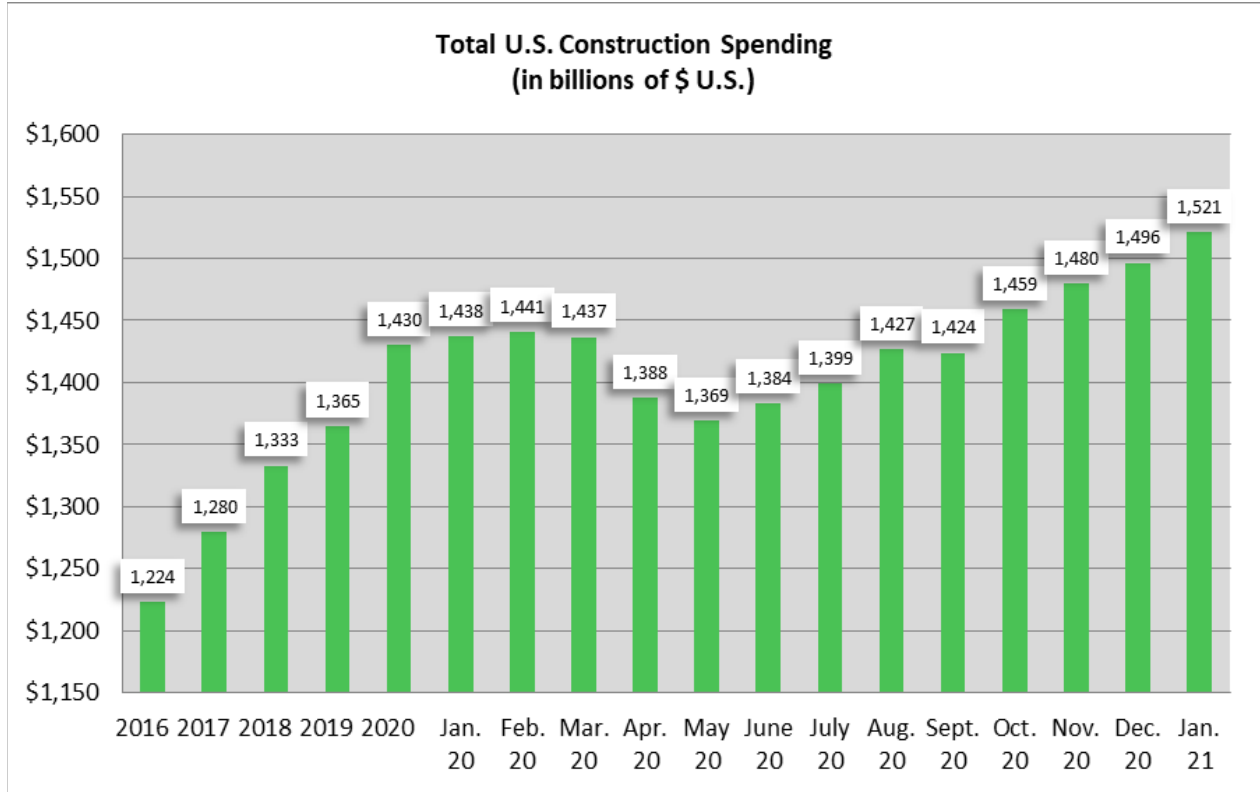
(Source: U.S. Census Bureau)





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