

1Q 2019 U.S. Ceramic Tile Industry Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption through 1Q 2019 was 717.2 million sq. ft., down 5.0% vs. 1Q 2018.¹

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>
1Q 2019	226,833	496,621	6,288	717,165	-5.0**
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
2015	897,943	1,881,051	40,718	2,738,276	9.9

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

**Note: Change from 1Q 2018

Imports:

Through 1Q 2019, 496.6 million sq. ft. of ceramic tile arrived in the U.S., down 5.4% from 1Q 2018 (525.0 million sq. ft.).

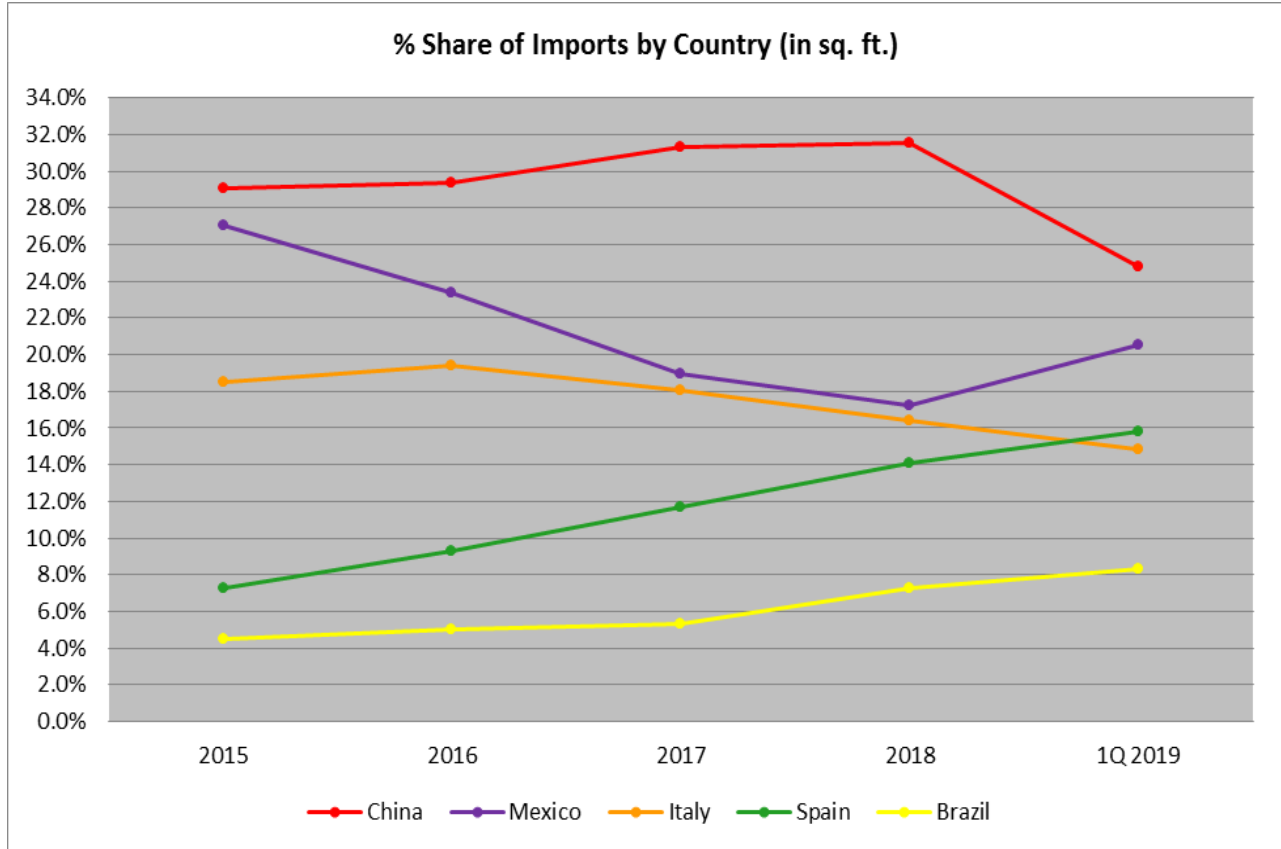
Imports in 1Q 2019 comprised 69.2% of U.S. tile consumption (in sq. ft.), down from 70.7% in the previous year.

China was the largest exporter to the U.S. through 1Q 2019 with a 24.8% share of U.S. imports (in sq. ft.), followed by Mexico (20.5%), and Spain (15.8%).²

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

² U.S. Dept. of Commerce





The five countries from which the most tiles were imported in 1Q 2019 based on sq. ft. were:

Country	Sq. Ft. 1Q 2019	Sq. Ft. 1Q 2018	2019/2018 % Change	2018/2017 % Change
China	123,173,913	175,164,914	-29.7%	11.7%
Mexico	102,012,776	95,415,059	6.9%	-10.5%
Spain	78,699,825	72,763,625	8.2%	62.7%
Italy	73,739,934	83,103,459	-11.3%	-8.2%
Brazil	41,241,223	28,851,241	42.9%	31.6%





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Italy remained the largest exporter to the U.S. on a dollar basis (1Q 2019), comprising 29.0% of U.S. imports. China was second with a 23.1% share, and Spain was third with a 17.9% share.

The five countries from which the most tiles were imported in 1Q 2019 based on total U.S. \$ value (including duty, freight, and insurance) were:

Country	Total Val 1Q 2019 (in \$)	Total Val 1Q 2018 (in \$)	2019/2018 % Change	2018/2017 % Change
Italy	148,242,585	160,478,914	-7.6%	-10.5%
China	118,266,782	152,235,995	-22.3%	6.9%
Spain	91,686,110	81,672,414	12.3%	33.0%
Mexico	61,857,143	58,854,469	5.1%	1.2%
Brazil	24,696,133	18,577,501	32.9%	25.9%
All Countries	511,211,212	535,825,441	-4.6%	3.1%

The average values of tile³ (including duty, freight, and insurance) from the five countries (based on sq. ft.) from which the most tiles were imported in 1Q 2019 were:

Country	Sq. Ft. 1Q 2019	Tot Val 1Q 2019 (in \$)	Value/Sq. Ft. 1Q 2019	Value/Sq. Ft. 1Q 2018	Value/Sq. Ft. 1Q 2017
China	123,173,913	118,266,782	\$0.96	\$0.87	\$0.91
Mexico	102,012,776	61,857,143	\$0.61	\$0.62	\$0.55
Spain	78,699,825	91,686,110	\$1.17	\$1.12	\$1.37
Italy	73,739,934	148,242,585	\$2.01	\$1.93	\$1.98
Brazil	41,241,223	24,696,133	\$0.60	\$0.64	\$0.67
All Countries	496,621,187	511,211,212	\$1.03	\$1.02	\$1.06

U.S. Shipments:

1Q 2019 U.S. shipments (less exports) were 220.5 million sq. ft., down 4.1% vs. 1Q 2018.

The \$ value/sq. ft. of U.S. shipments (less exports) in 1Q 2019 was \$1.53, up from \$1.51 in 1Q 2018.

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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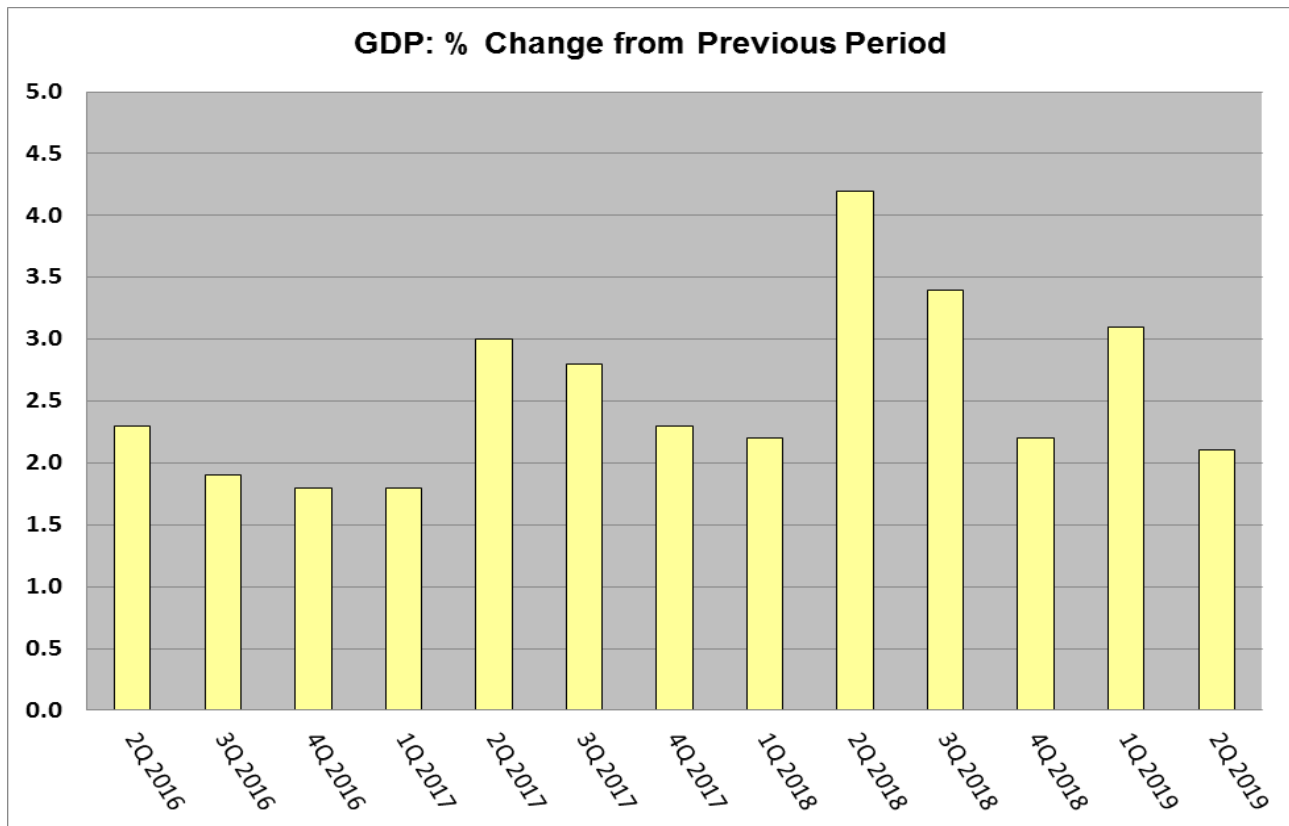
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U.S. produced tile comprised 30.8% of the U.S. ceramic tile market (in sq. ft.) in 1Q 2019 and 39.8% by \$ value.⁴

Exports:

U.S. ceramic tile exports in 1Q 2019 fell 6.5% (in sq. ft.) from 1Q 2018. The vast majority of U.S. exports (in sq. ft.) were to Canada (79.7%) and Mexico (6.8%).⁵

Economic Highlights:

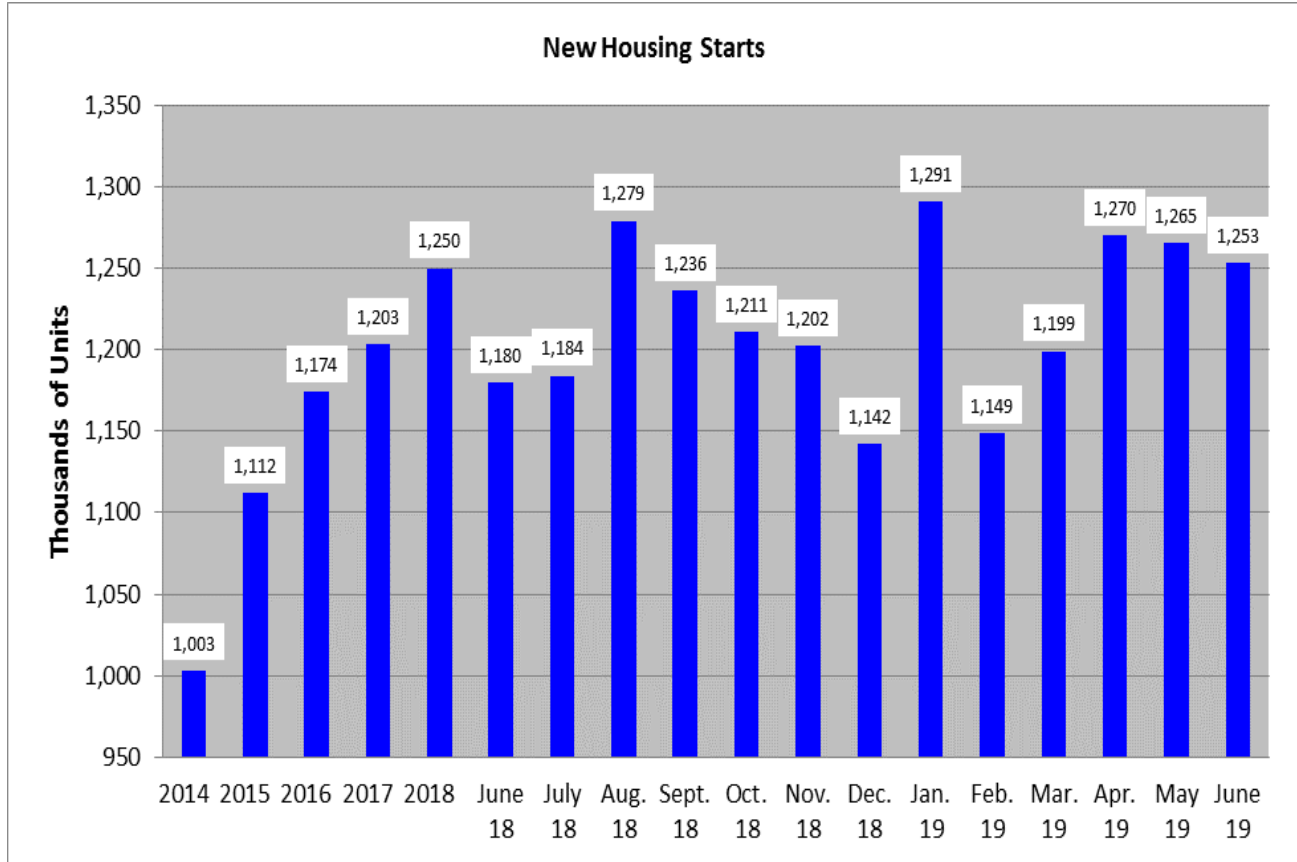


(Source: Bureau of Economic Analysis)

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

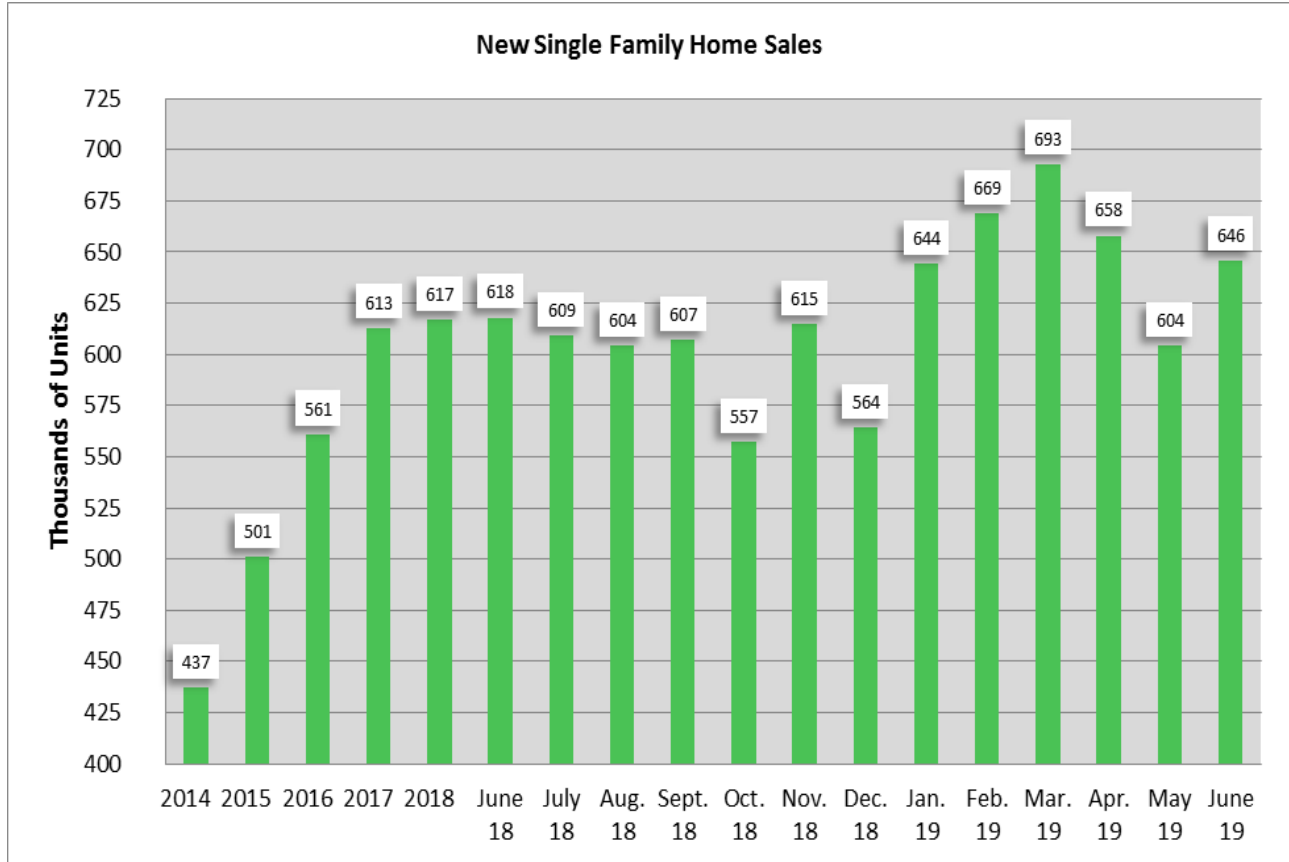
⁵ U.S. Dept. of Commerce





(Source: U.S. Census Bureau)





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