

1Q 2020 U.S. Ceramic Tile Industry Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption in 1Q 2020 was 635.0 million sq. ft., down 12.2% vs. 1Q 2019.¹

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 2020	221,196	422,565	8,769	634,991	-12.2**
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 1Q 2019

Imports:

In 1Q 2020, 422.6 million sq. ft. of ceramic tile arrived in the U.S., down 14.9% from 1Q 2019.

Imports in 1Q 2020 comprised 66.5% of U.S. tile consumption (by volume), down from 70.6% in the previous year.

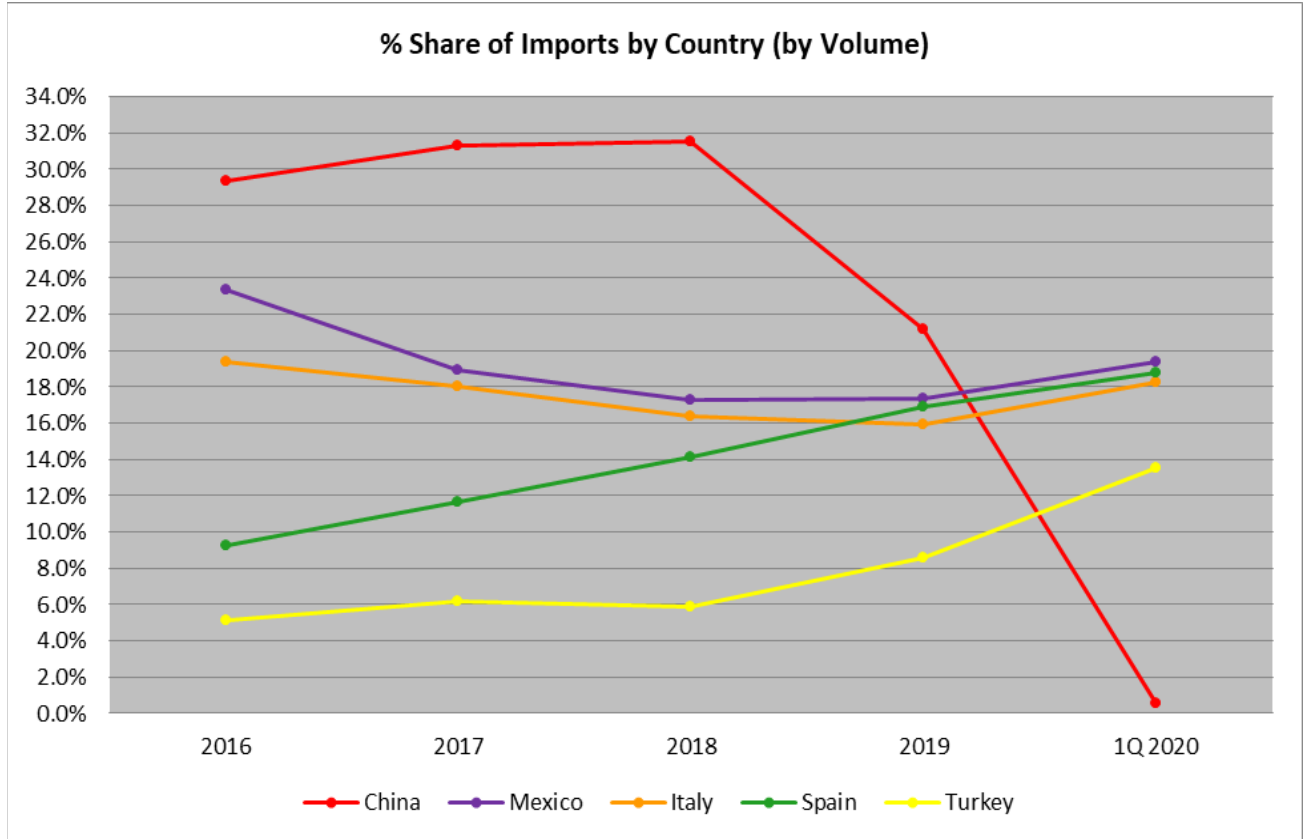
Mexico was the largest exporter to the U.S. in 1Q 2020 with a 19.4% share of U.S. imports (by volume), followed by Spain (18.8%) and Italy (18.3%).²

The following chart shows the % share of 1Q 2020 imports (by volume) for select countries.

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 2020 based on volume were:

Country	Sq. Ft. 1Q 2020	Sq. Ft. 1Q 2019	2020/2019 % Change	2019/2018 % Change
Mexico	82,024,151	102,012,776	-19.6%	6.9%
Spain	79,400,653	78,699,825	0.9%	8.2%
Italy	77,265,459	73,739,934	4.8%	-11.3%
Turkey	57,201,853	30,786,711	85.8%	7.6%
Brazil	49,369,978	41,241,223	19.7%	42.9%





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Italy remained the largest exporter to the U.S. on a dollar basis (CIF + duty) in 1Q 2020, comprising 34.0% of U.S. imports, followed by Spain (21.5%) and Mexico (12.8%).

The five countries from which the most tiles were imported in 1Q 2020 based on total U.S. \$ value (CIF + duty) were:

Country	Total Val 1Q 2020 (in \$)	Total Val 1Q 2019 (in \$)	2020/2019 % Change	2019/2018 % Change
Italy	152,198,727	148,242,585	2.7%	-7.6%
Spain	96,381,813	91,686,110	5.1%	12.3%
Mexico	57,562,515	61,857,143	-6.9%	5.1%
Turkey	42,716,106	23,541,637	81.4%	-5.6%
Brazil	31,746,427	24,696,133	28.5%	32.9%
All Countries	448,225,602	511,211,212	-12.3%	-4.6%

The average values of tile³ (CIF + duty) from the five countries (based on volume) from which the most tiles were imported in 1Q 2020 were:

Country	Sq. Ft. 1Q 2020	Tot Val 1Q 2020 (in \$)	Val/Sq. Ft. 1Q 2020	Val/Sq. Ft. 1Q 2019
Mexico	82,024,151	57,562,515	\$0.70	\$0.61
Spain	79,400,653	96,381,813	\$1.21	\$1.17
Italy	77,265,459	152,198,727	\$1.97	\$2.01
Turkey	57,201,853	42,716,106	\$0.75	\$0.76
Brazil	49,369,978	31,746,427	\$0.64	\$0.60
All Countries	422,565,010	448,225,602	\$1.06	\$1.03

U.S. Shipments:

1Q 2020 U.S. shipments (less exports) were 212.4 million sq. ft., down 6.1% vs. 1Q 2019.

The \$ value/sq. ft. of U.S. shipments (less exports) in 1Q 2020 was \$1.52, down from \$1.55 in 2019.

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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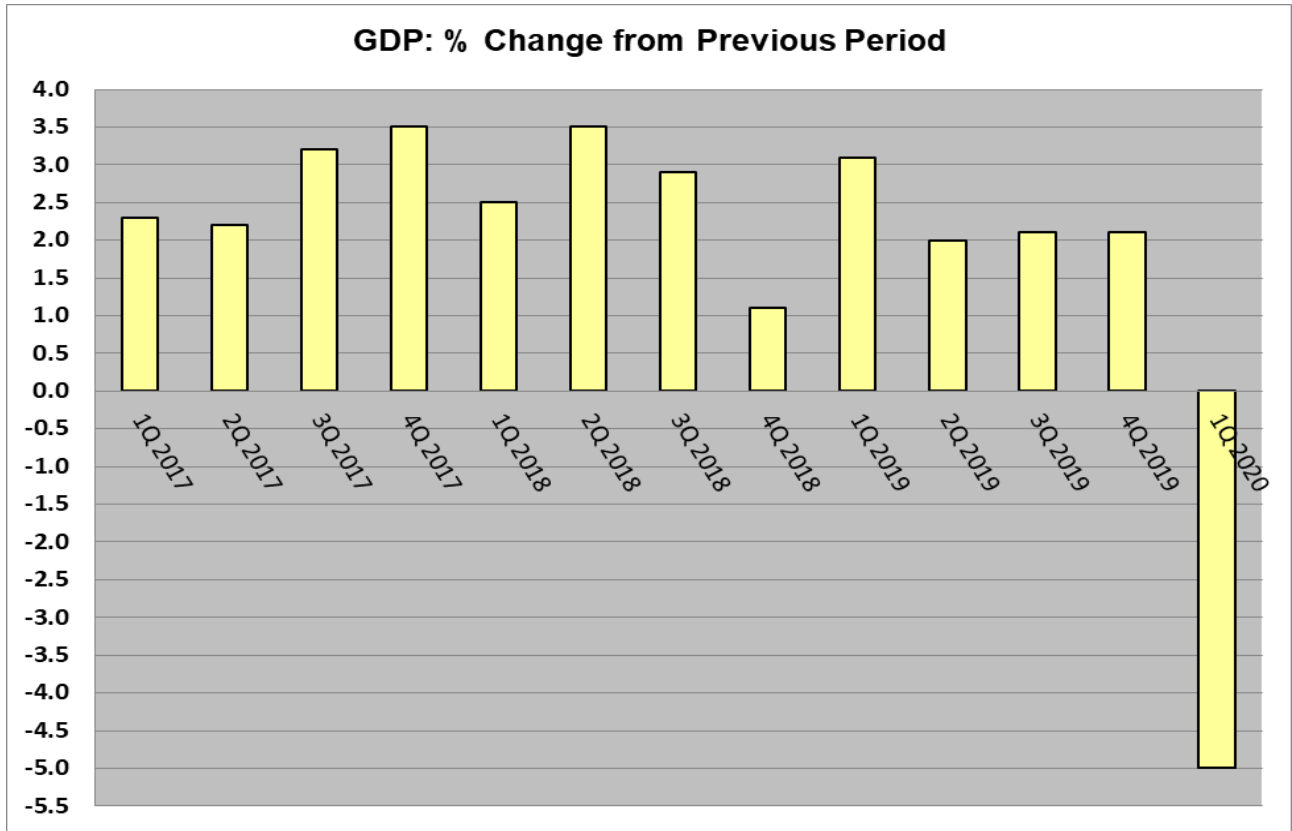


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Exports:

U.S. ceramic tile exports in 1Q 2020 rose 39.5% (by volume) from 1Q 2019. The two largest recipients of U.S. exports by volume were Canada (65.1%) and Mexico (14.2%).⁴

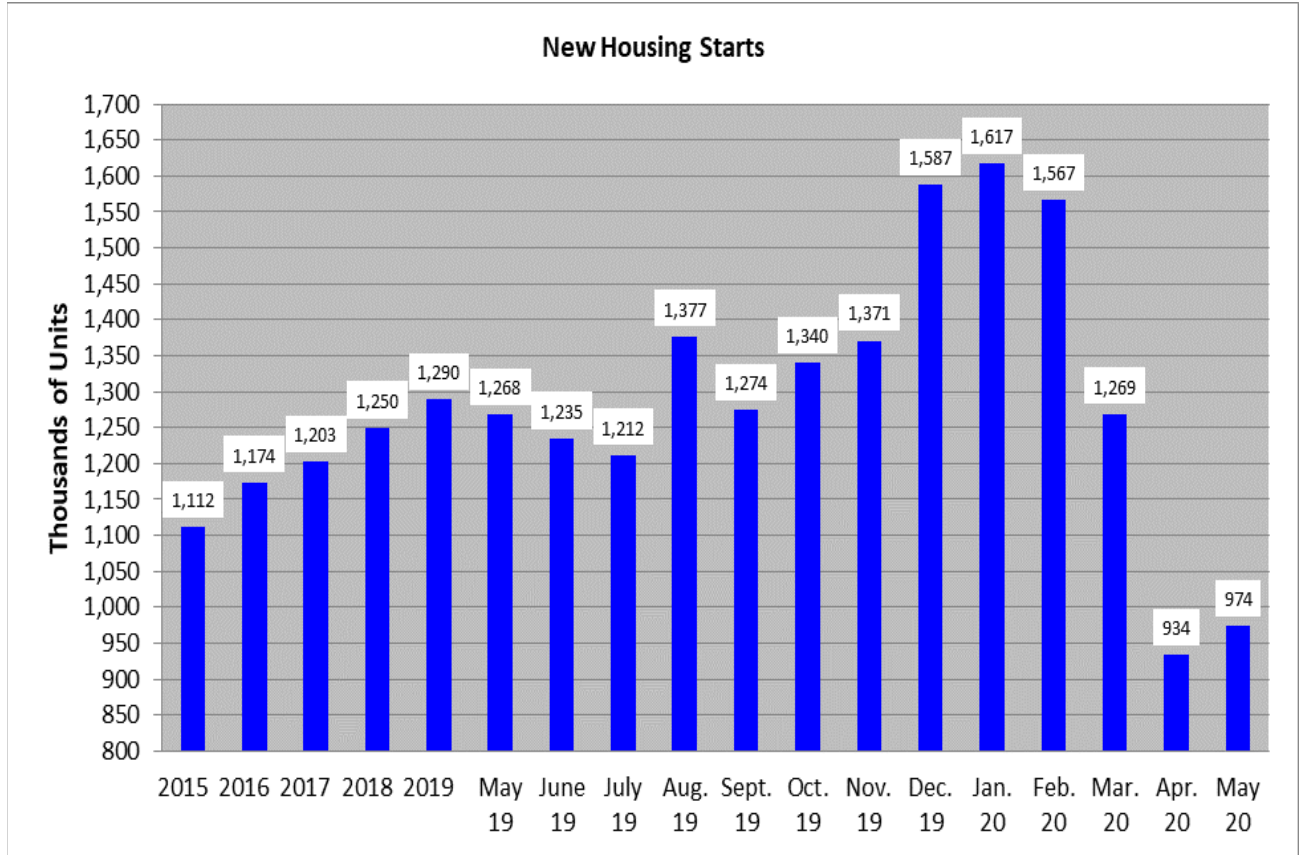
Economic Highlights:



(Source: Bureau of Economic Analysis)

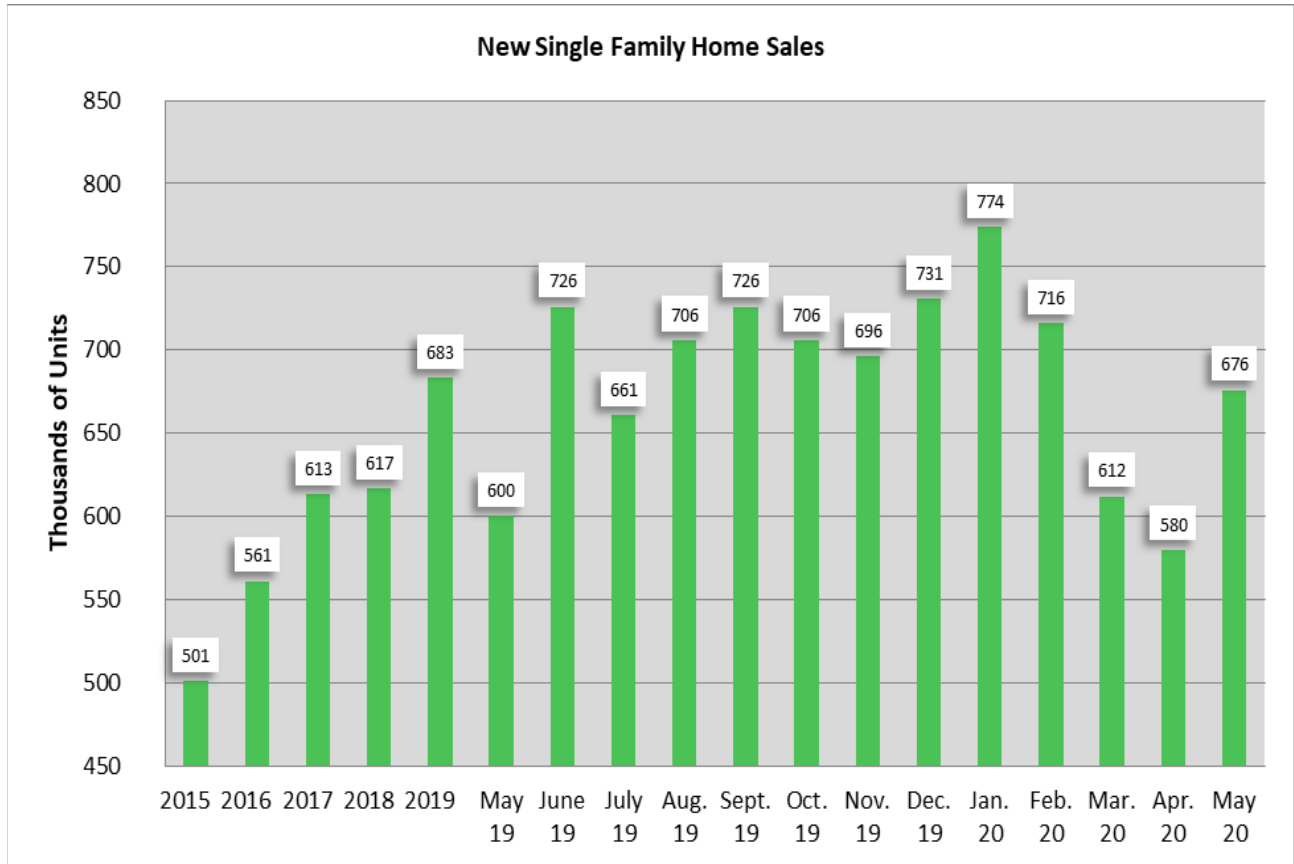
⁴ U.S. Dept. of Commerce





(Source: U.S. Census Bureau)





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