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2018 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

Total U.S. ceramic tile consumption for 2018 was 3.11 billion sq. ft., up 1.5% vs. 2017.¹

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>Consumption Change vs. Previous Year</u>
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%
2014	816,050	1,711,571	36,996	2,490,624	0.5%

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

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

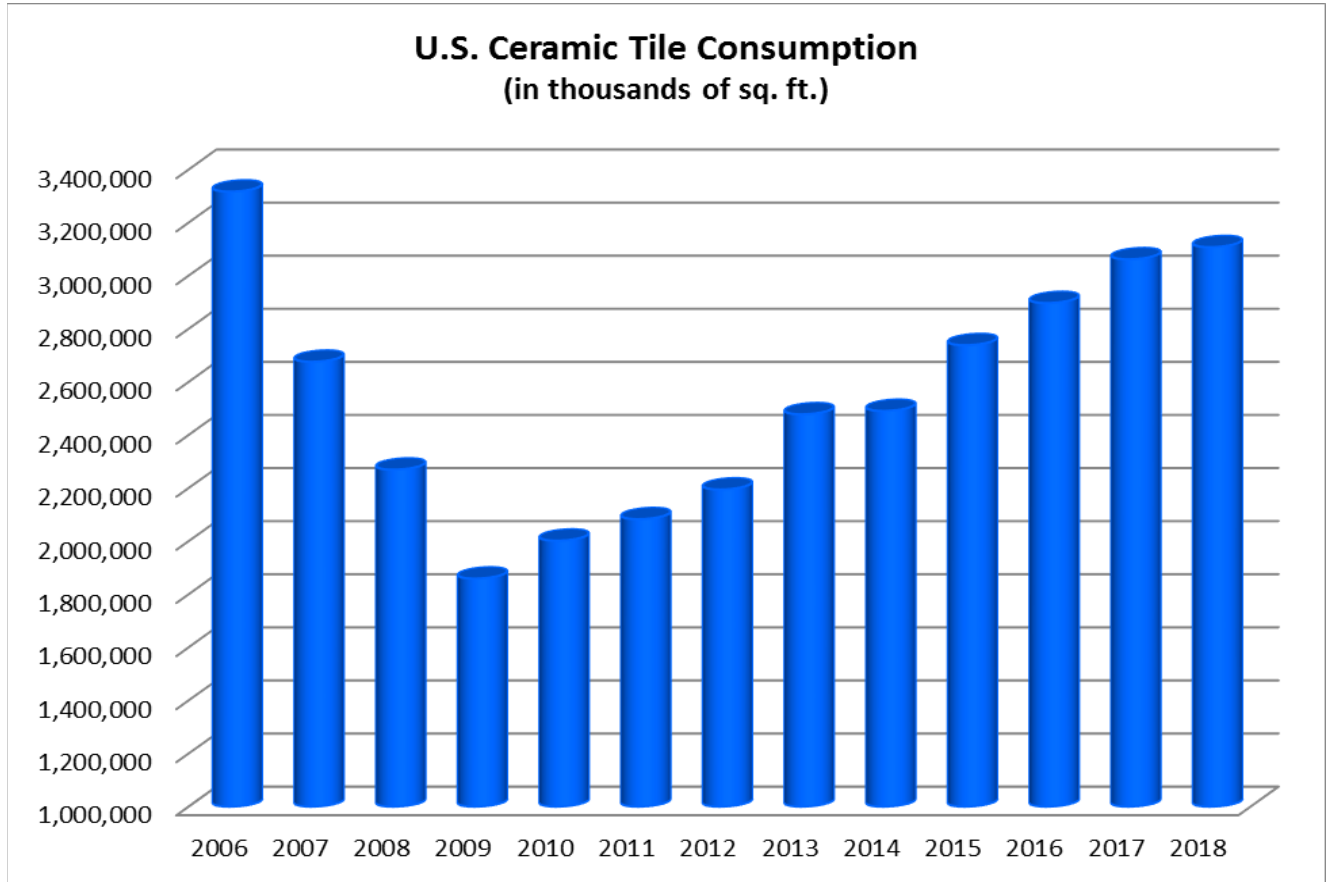
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The chart below shows total U.S. consumption of ceramic tile (in sq. ft.) over the last several years.



Imports:

In 2018 the U.S. imported 2.20 billion sq. ft. of ceramic tile, up 4.7% from 2017 (2.10 billion sq. ft.).²

Imports comprised 70.7% of 2018 U.S. tile consumption in sq. ft., up from 68.6% in 2017.

² U.S. Dept. of Commerce





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China remained the largest exporter of ceramic tile to the U.S. (in sq. ft.), a position it has held each year since 2015. Chinese imports made up 31.5% of U.S. imports (in sq. ft.) in 2018, the highest annual percentage China has ever held of the U.S. import market. The 10% tariff increase on Chinese ceramic tile imports imposed by the Trump administration took effect at the end of Sept., but it is unlikely this will have any meaningful impact on China’s market position.

Despite the peso’s significant decline vs. the U.S. dollar over the last five years, losing nearly half of its value, Mexican ceramic tile exports to the U.S. have fallen each year since 2015. In 2018 tile from Mexico comprised 17.3% of U.S. imports (in sq. ft.), their lowest share since 2006.

Italy was the third largest exporter of tile to the U.S. in 2018, making up 16.4% of U.S. imports (in sq. ft.), down from 18.1% in 2017. The next largest exporters to the U.S. were Spain (14.1% import share) and Brazil (7.3%).³

The five countries from which the most tiles were imported in 2018 based on sq. ft. were:

Country	Sq. Ft. 2018	Sq. Ft. 2017	2018/2017 % Change	2017/2016 % Change
China	692,147,717	657,563,014	5.3%	12.7%
Mexico	379,093,644	397,514,645	-4.6%	-14.4%
Italy	360,060,284	378,957,771	-5.0%	-1.7%
Spain	310,208,579	244,858,241	26.7%	32.8%
Brazil	159,575,661	111,176,480	43.5%	12.0%

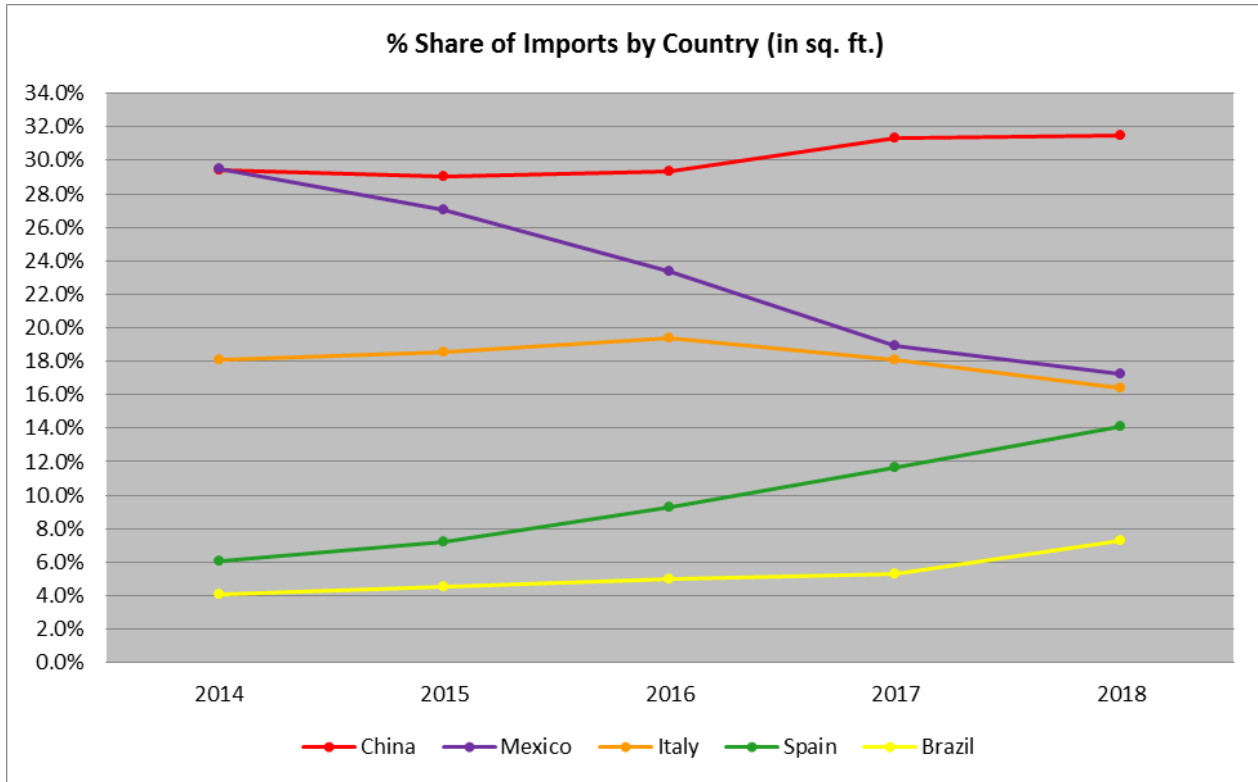
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On a dollar basis (CIF + duty) Italy remained the largest exporter to the U.S. in 2018, comprising 30.9% of U.S. imports. China was second with a 27.3% share, and Spain was third with a 15.6% share.

The five countries from which the most tiles were imported in 2018 based on total U.S. \$ value (including duty, freight, and insurance) were:

Country	Total Val 2018	Total Val 2017	2018/2017 % Change	2017/2016 % Change
Italy	709,898,735	747,819,530	-5.1%	-0.4%
China	626,339,930	589,660,075	6.2%	13.8%
Spain	359,297,060	307,444,773	16.9%	25.2%
Mexico	230,421,036	220,463,848	4.5%	-16.9%
Turkey	108,526,735	117,440,187	-7.6%	8.9%
All Countries	2,298,042,045	2,218,153,090	3.6%	5.7%





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The average values of tile⁴ (including duty, freight, and insurance) from the five countries from which the most tiles were imported (based on sq. ft.) in 2018 were:

Country	Sq. Ft. 2018	Tot \$ Val 2018	Value per Sq. Ft. 2018	Value per Sq. Ft. 2017
China	692,147,717	626,339,930	\$0.90	\$0.90
Mexico	379,093,644	230,421,036	\$0.61	\$0.55
Italy	360,060,284	709,898,735	\$1.97	\$1.97
Spain	310,208,579	359,297,060	\$1.16	\$1.26
Brazil	159,575,661	101,396,208	\$0.64	\$0.70
All Countries	2,196,934,718	2,298,042,045	\$1.05	\$1.06

U.S. Shipments:

U.S. shipments (less exports) in 2018 were 911 million sq. ft., down 5.4% from 2017. This marks the first year-over-year decline in domestic shipments since 2009.

In 2018 domestically-produced tile accounted for 29.3% of all U.S. tile consumption in sq. ft., followed by China (22.3%), Mexico (12.2%), and Italy (11.6%).

In dollar value 2018 U.S. FOB factory sales of domestic shipments were \$1.39 billion, down 4.4% vs. 2017 (\$1.45 billion). Domestically-produced tile comprised 37.7% of total U.S. tile consumption by dollar value.

The per unit value of domestic shipments increased from \$1.51 sq. ft. in 2017 to \$1.53 sq. ft. in 2018.⁵

Exports:

U.S. ceramic tile exports in 2018 were 29.7 million sq. ft., up 4.4% vs. 2017. The lion's share of these exports were to our North American neighbors, Canada (79.6%) and Mexico (4.5%).⁶

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.

⁵ Tile Council of North America

⁶ U.S. Dept. of Commerce

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Economic Highlights:

New Home Starts

Total new home starts increased for the ninth consecutive year and were at their highest annual level since 2007. The estimated 1.25 million units started in 2018 represented a 3.9% increase from the previous year.

Even with this consistent growth, there is still a long way to go to achieve pre-recession levels, as 2018 starts were off 40% from 2005, when there were nearly 2.1 million starts.⁷

New Single Family Home Sales

New single family home sales were at their highest level in more than a decade. The 619,000 units sold in 2018 represented a 1.0% increase from 2017.

While new home sales have steadily increased each of the last seven years and have more than doubled since 2011, in 2018 they were less than half of what they were in 2005, when a record 1.28 million new single-family units were sold.⁸

Foreclosures

U.S. foreclosure filings, a key inverse indicator of the residential market's health, fell for the eighth straight year. The 625,000 filings (0.47% of all U.S. housing units) in 2018 represented a 7.7% decrease from 2017.

This was the lowest annual total of foreclosures since 2005 and was a 78.2% decrease from the all-time high level of 2.9 million filings in 2010.⁹

⁷ U.S. Census Bureau

⁸ U.S. Census Bureau

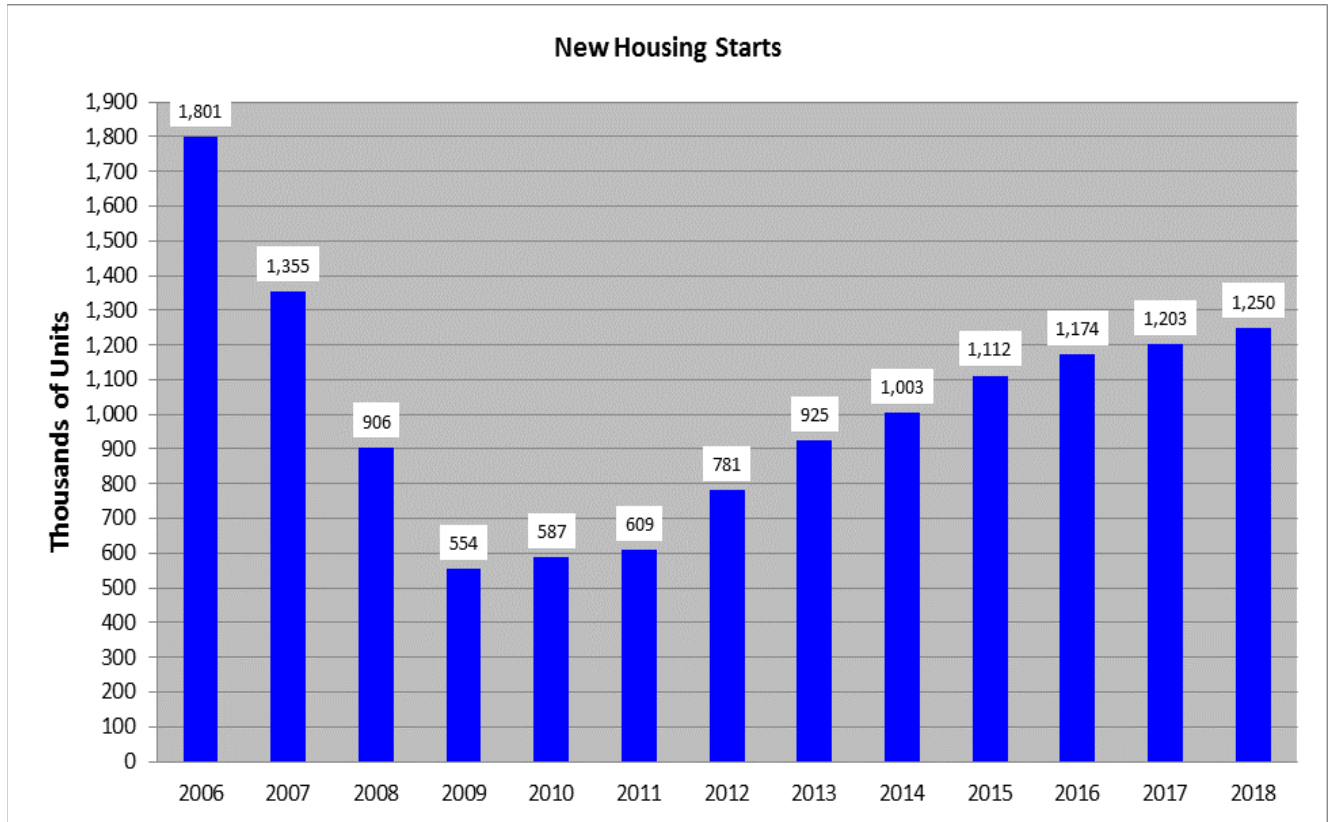
⁹ ATTOM Data Solutions

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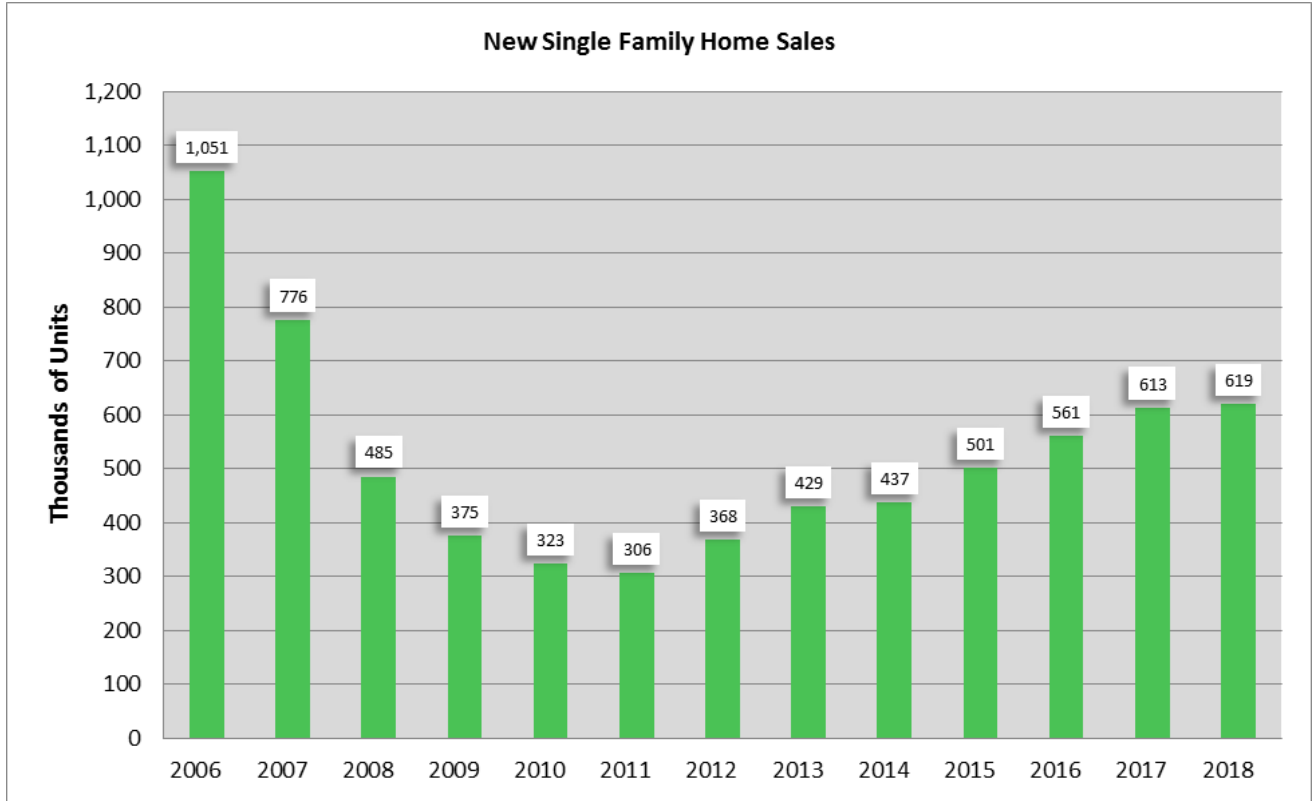
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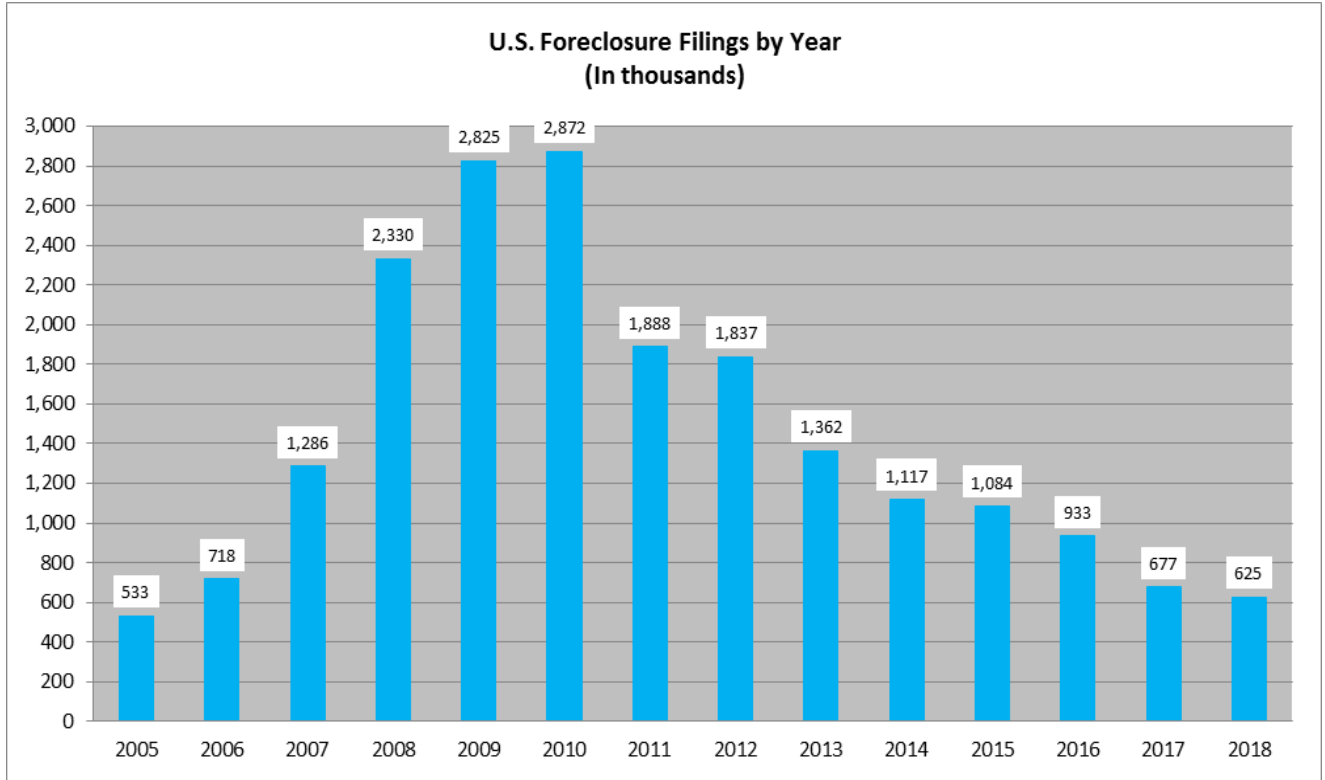




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