

2Q 2021 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

Through 2Q 2021 total U.S. ceramic tile consumption rose 23.7% by volume vs. 2Q 2020 YTD.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>
2Q 2021 YTD	459,150	1,099,347	19,004	1,539,493	23.7**
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

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

**Note: Change vs. 2Q 2020 YTD

Imports:

Through 2Q 2021, the U.S. imported 1.10 billion sq. ft. of ceramic tile, up 34.8% from 2Q 2020 YTD.²

Imports comprised 71.4% of U.S. tile consumption by volume 2Q 2021 YTD, up from 69.3% in 2020.

Spain, having replaced China last year as the largest exporter to the U.S. by volume, retained the top position through 2Q 2021 with a 20.9% share of U.S. imports, followed by Mexico (17.6% share of imports) and Italy (16.3%).³

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

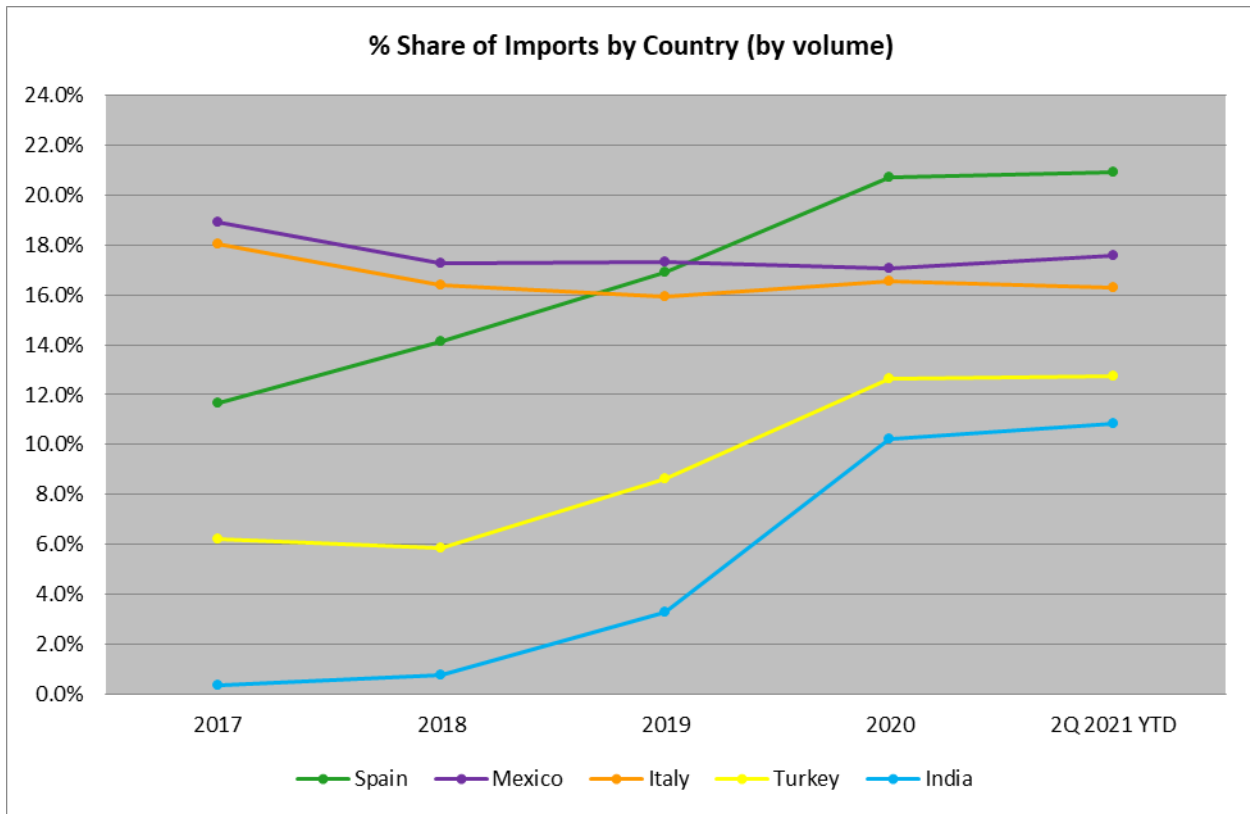
² U.S. Dept. of Commerce

³ U.S. Dept. of Commerce



The five countries from which the most tiles were imported through 2Q 2021, based on volume, were:

Country	Sq. Ft. 2Q 2021 YTD	Sq. Ft. 2Q 2020 YTD	% Change
Spain	229,819,864	170,231,588	35.0%
Mexico	192,996,806	149,531,802	29.1%
Italy	179,006,532	146,804,184	21.9%
Turkey	140,150,731	109,034,634	28.5%
India	119,444,638	61,105,482	95.5%
All Countries	1,099,346,641	815,820,785	34.8%





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By dollar value (CIF + duty) Italy remained the largest exporter to the U.S. (2Q 2021 YTD), comprising 30.6% of U.S. imports, followed by Spain (24.0%) and Mexico (10.8%).

The five countries from which the most tiles were imported 2Q 2021 YTD, based on total dollar value (CIF + duty), were:

Country	\$ Val 2Q 2021 YTD	\$ Val 2Q 2020 YTD	% Change
Italy	360,189,439	285,914,383	26.0%
Spain	282,326,589	197,607,375	42.9%
Mexico	126,905,367	98,427,508	28.9%
Turkey	104,297,865	82,750,849	26.0%
India	87,389,504	41,705,334	109.5%
All Countries	1,175,589,456	855,338,418	37.4%

The average values of tile⁴ (including CIF + duty) from the five countries from which the most tiles were imported by volume 2Q 2021 YTD were:

Country	Sq. Ft. 2Q 2021 YTD	\$ Val 2Q 2021 YTD	Val/Sq. Ft. 2Q 2021 YTD	Val/Sq. Ft. 2Q 2020 YTD
Spain	229,819,864	282,326,589	\$1.23	\$1.16
Mexico	192,996,806	126,905,367	\$0.66	\$0.66
Italy	179,006,532	360,189,439	\$2.01	\$1.95
Turkey	140,150,731	104,297,865	\$0.74	\$0.76
India	119,444,638	87,389,504	\$0.73	\$0.68
All Countries	1,099,346,641	1,175,589,456	\$1.07	\$1.05

U.S. Shipments:

U.S. shipments (less exports) 2Q 2021 YTD were 440.1 million sq. ft., up 2.6% vs. 2Q 2020 YTD.

In dollar value, 2Q 2021 YTD U.S. FOB factory sales of domestic shipments were \$675.6 million, up 5.5% vs. 2Q 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 domestic shipments 2Q 2021 YTD was \$1.53, up from \$1.49 2Q 2020 YTD.⁵

U.S. Exports:

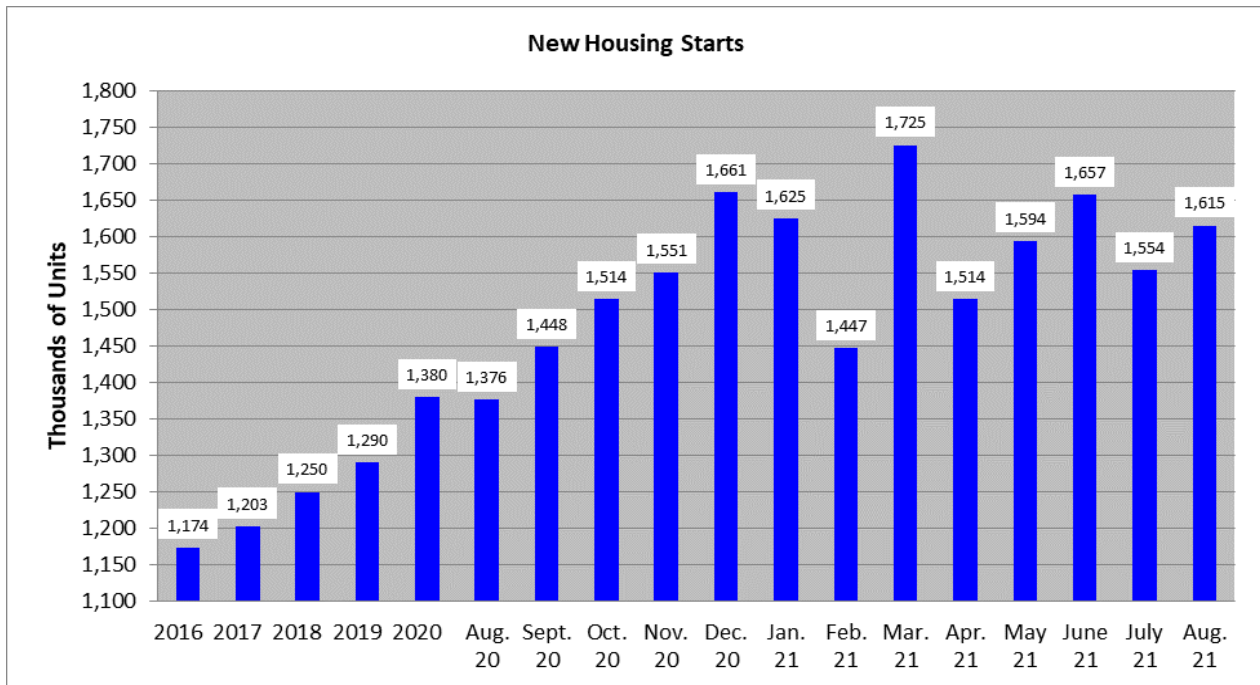
U.S. ceramic tile exports 2Q 2021 YTD were 19.0 million sq. ft., up 20.4% vs. 2Q 2020 YTD.

The vast majority of U.S. exports by volume were to Canada (67.7%) and Mexico (19.5%).⁶

Housing Market Highlights:

New Home Starts

Aug. 2021 new home starts were at a seasonally-adjusted annual rate of 1,615,000 units, a 3.9% increase from the previous month and a 17.4% increase from Aug. 2020.⁷



⁵ Tile Council of North America

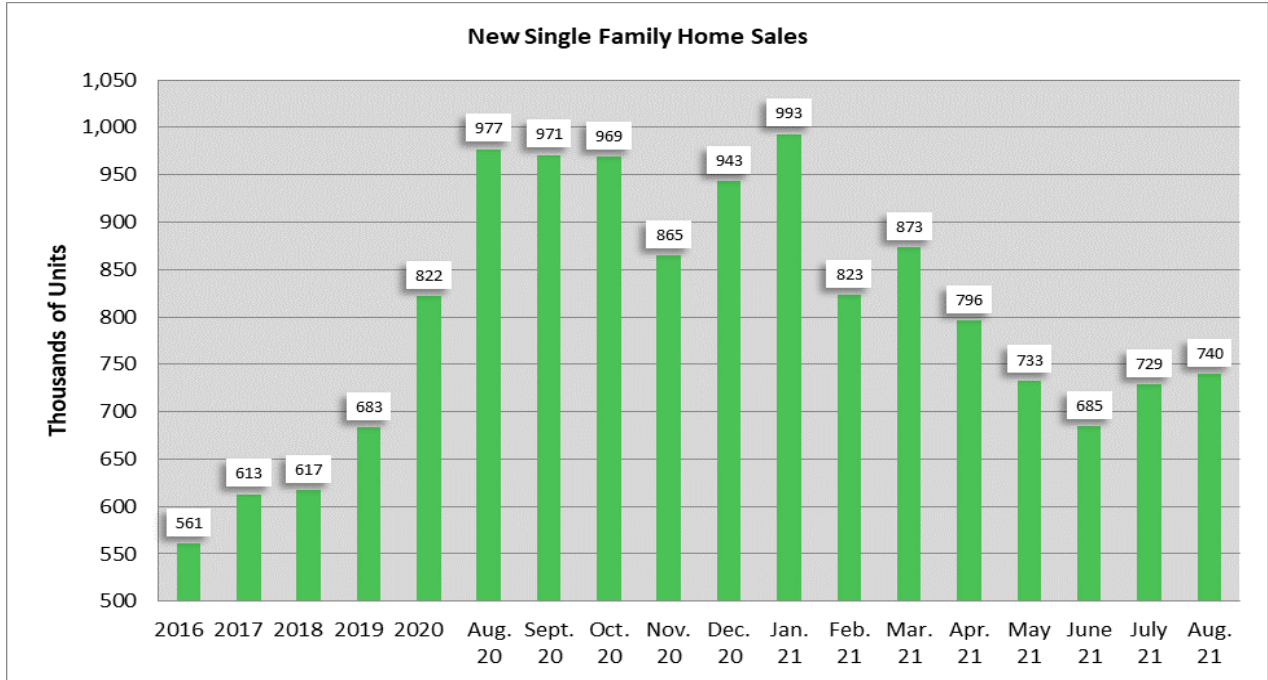
⁶ U.S. Dept. of Commerce

⁷ U.S. Census Bureau



New Single Family Home Sales

Aug. 2021 new one-family home sales were at a seasonally-adjusted annual rate of 740,000 units, a 1.5% increase from July 2021 but a 24.3% decrease from Aug. 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

