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1Q 2023 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption 1Q 2023 YTD was down 3.9% by volume vs. 1Q 2022 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>
1Q 2023 YTD	227,564	483,109	11,231	699,442	-3.9**
2022	939,966	2,182,363	50,754	3,071,575	-1.3
2021	918,264	2,233,142	37,986	3,113,421	9.9
2020	898,533	1,966,443	31,009	2,833,967	-3.6
2019	895,332	2,077,038	31,782	2,940,588	-5.4

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

**Note: Change vs. 1Q 2022 YTD

Imports²

The U.S. imported 483.1 million sq. ft. of ceramic tile 1Q 2023 YTD, down 4.6% from 1Q 2022 YTD.

Imports comprised 69.1% of U.S. tile consumption by volume 1Q 2023 YTD, down from 69.6% 1Q 2022 YTD.

Through 1Q 2023, Mexico was the largest exporter by volume to the U.S. with a 20.5% share of U.S. imports, followed by India (17.9%) and Spain (16.7%).

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

² U.S. Dept. of Commerce

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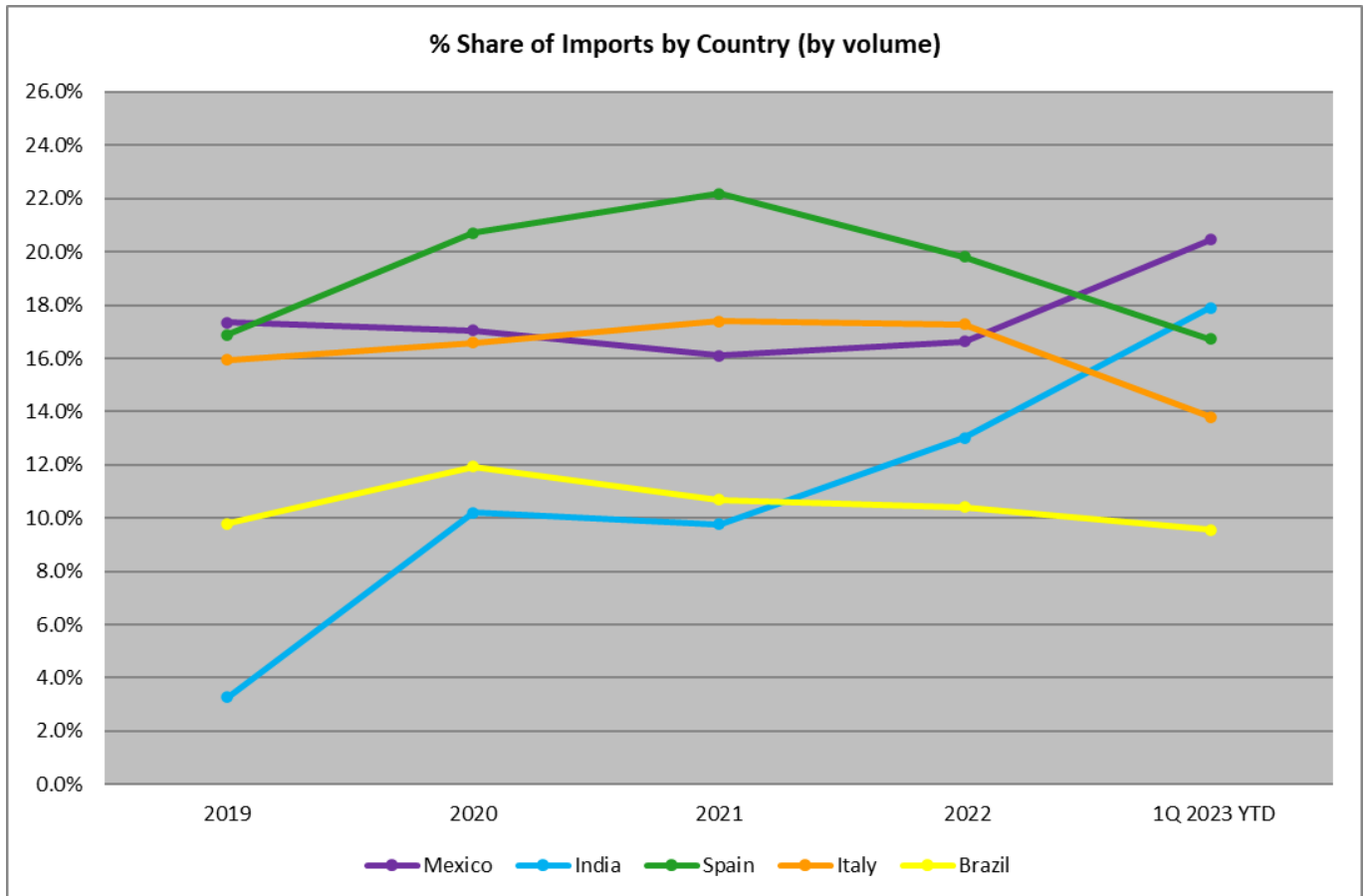
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The five countries from which the most tiles were imported 1Q 2023 YTD, based on volume, were:

Country	Sq. Ft. 1Q 2023	Sq. Ft. 1Q 2022	% Change
Mexico	98,827,132	81,813,146	20.8%
India	86,480,302	61,674,483	40.2%
Spain	80,781,662	112,916,563	-28.5%
Italy	66,652,491	82,954,465	-19.7%
Brazil	46,160,104	51,852,996	-11.0%
All Countries	483,109,304	506,662,710	-4.6%





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Italy was the largest exporter by value (CIF+duty), comprising 27.3% of 1Q 2023 YTD U.S. tile imports, followed by Spain (24.7%) and Mexico (13.1%).

The five countries from which the most tiles were imported based on total U.S. \$ value (CIF + duty) in 1Q 2023 were:

Country	\$ Val 1Q 2023	\$ Val 1Q 2022	% Change
Italy	164,507,238	178,597,828	-7.9%
Spain	148,998,769	185,842,574	-19.8%
Mexico	79,177,687	62,415,003	26.9%
India	52,635,008	49,333,069	6.7%
Turkey	41,850,785	52,861,718	-20.8%
All Countries	602,481,120	636,280,616	-5.3%

The average values of tile³ (including CIF + duty) from the five countries from which the most tiles were imported by volume in 1Q 2023 were:

Country	Sq. Ft. 1Q 2023	\$ Val 1Q 2023	Val/Sq. Ft. 1Q 2023	Val/Sq. Ft. 1Q 2022
Mexico	98,827,132	79,177,687	\$0.80	\$0.76
India	86,480,302	52,635,008	\$0.61	\$0.80
Spain	80,781,662	148,998,769	\$1.84	\$1.65
Italy	66,652,491	164,507,238	\$2.47	\$2.15
Brazil	46,160,104	39,667,596	\$0.86	\$0.79
All Countries	483,109,304	602,481,120	\$1.25	\$1.26

U.S. Shipments⁴

U.S. shipments (less exports) 1Q 2023 YTD were 216.3 million sq. ft., down 2.3% vs. 1Q 2022 YTD.

U.S. FOB factory sales (less exports) 1Q 2023 YTD were \$373.6 billion, up 5.1% vs. 1Q 2022 YTD.

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.

⁴ Tile Council of North America

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The \$ value/sq. ft. of 1Q 2023 YTD U.S. shipments (less exports) was \$1.73, up from \$1.61 (1Q 2022 YTD).

U.S. Exports⁵

U.S. ceramic tile exports 1Q 2023 YTD decreased 24.0% by volume from 1Q 2022 YTD.

The two largest consumers of U.S. exports by volume were Canada (61.4% share) and Mexico (23.6% share).

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 2005, 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.

About International Product Assurance (IPA) Laboratories

International Product Assurance Laboratories (formerly the TCNA Product Performance Testing Laboratory) offers unparalleled third-party, ISO 17025 accredited, independent laboratory services including testing of ceramic, glass, and stone tiles and panels, concrete products such as pavers, all countertop surfacing materials, composite materials such as LVT, LVP, and rigid core products, materials used in the installation of hard surface floor and wall coverings, and related raw materials. IPA Laboratories also offers antiviral, antibacterial, and other microbiological testing and research. The lab is located adjoining the Clemson University Innovation Campus and Technology Park with access to a broad spectrum of equipment including SEM, TEM, GCMS, FTIR, ICP-EMS, and more.

⁵ U.S. Dept. of Commerce

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