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2Q 2023 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

U.S. ceramic tile consumption 2Q 2023 YTD was down 4.7% by volume vs. 2Q 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>
2Q 2023 YTD	467,597	995,816	23,125	1,440,288	-4.7**
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. 2Q 2022 YTD

Imports²

The U.S. imported 995.8 million sq. ft. of ceramic tile 2Q 2023 YTD, down 6.1% from 2Q 2022 YTD.

Imports comprised 69.1% of U.S. tile consumption by volume 2Q 2023 YTD, down from 70.1% 2Q 2022 YTD.

Through 2Q 2023, India was the largest exporter by volume to the U.S. with a 19.7% share of U.S. imports, followed by Mexico (18.3%) and Spain (17.3%).

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

² U.S. Dept. of Commerce

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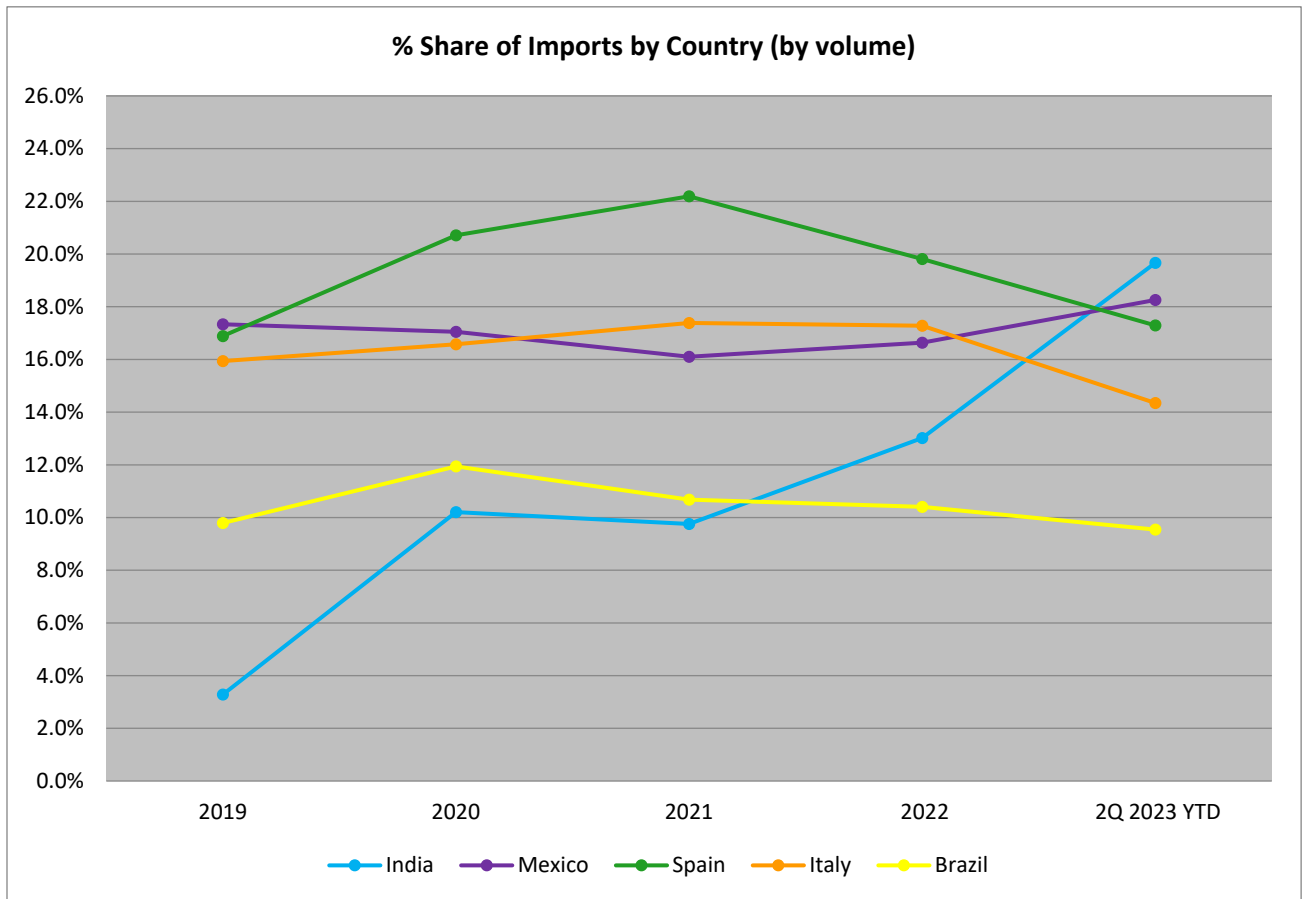
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The five countries from which the most tiles were imported 2Q 2023 YTD based on volume were:

Country	Sq. Ft. 2Q 2023 YTD	Sq. Ft. 2Q 2022 YTD	% Change
India	195,819,835	124,759,803	57.0%
Mexico	181,804,169	171,880,307	5.8%
Spain	172,219,951	216,320,779	-20.4%
Italy	142,874,733	183,045,485	-21.9%
Brazil	95,035,555	111,567,662	-14.8%
All Countries	995,816,036	1,060,123,113	-6.1%



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Italy was the largest exporter by value (CIF + duty), comprising 27.6% of 2Q 2023 YTD U.S. tile imports, followed by Spain (25.9%) and Mexico (11.9%).

The five countries from which the most tiles were imported based on total U.S. \$ value (CIF + duty) 2Q 2023 YTD were:

Country	\$ Value 2Q 2023 YTD	\$ Value 2Q 2022 YTD	% Change
Italy	352,891,814	415,770,893	-15.1%
Spain	331,171,186	373,179,363	-11.3%
Mexico	151,842,916	129,860,024	16.9%
India	122,101,712	106,849,115	14.3%
Turkey	94,258,948	121,900,803	-22.7%
All Countries	1,276,815,007	1,386,007,736	-7.9%

The average values of tile³ (including CIF + duty) from the five countries from which the most tiles were imported by volume 2Q 2023 YTD were:

Country	Sq. Ft. 2Q 2023 YTD	\$ Value 2Q 2023 YTD	Val/Sq. Ft. 2Q 2023 YTD	Val/Sq. Ft. 2Q 2022 YTD
India	195,819,835	122,101,712	\$0.62	\$0.86
Mexico	181,804,169	151,842,916	\$0.84	\$0.76
Spain	172,219,951	331,171,186	\$1.92	\$1.73
Italy	142,874,733	352,891,814	\$2.47	\$2.27
Brazil	95,035,555	81,454,021	\$0.86	\$0.81
All Countries	995,816,036	1,276,815,007	\$1.28	\$1.31

U.S. Shipments⁴

U.S. shipments (less exports) 2Q 2023 YTD were 444.5 million sq. ft., down 1.6% vs. 2Q 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





U.S. FOB factory sales (less exports) 2Q 2023 YTD were \$775.4 million, up 4.4% vs. 2Q 2022 YTD.

The \$ value/sq. ft. of 2Q 2023 YTD U.S. shipments (less exports) was \$1.74, up from \$1.64 (2Q 2022 YTD).

U.S. Exports⁵

U.S. ceramic tile exports 2Q 2023 YTD decreased 17.0% by volume from 2Q 2022 YTD.

The two largest consumers of U.S. exports by volume were our North American neighbors, Canada (66.5% share) and Mexico (19.5% 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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