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3Q 2023 U.S. Ceramic Tile Market Update

(Clemson, SC)— U.S. ceramic tile consumption through 3Q 2023 was 2.18 billion sq. ft., down 8.0% vs. 3Q 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>
3Q 2023 YTD	697,605	1,524,584	40,203	2,181,986	-8.0**
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. 3Q 2022 YTD

Imports²

The U.S. imported 1.52 billion sq. ft. of ceramic tile 3Q 2023 YTD, down 10.3% from 3Q 2022 YTD.

Imports comprised 69.9% of U.S. tile consumption by volume 3Q 2023 YTD, down from 71.6% 3Q 2022 YTD.

Through 3Q 2023, India was the largest exporter by volume to the U.S. with a 19.9% share of U.S. imports, followed by Spain (17.6%) and Mexico (16.9%).

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

² U.S. Dept. of Commerce

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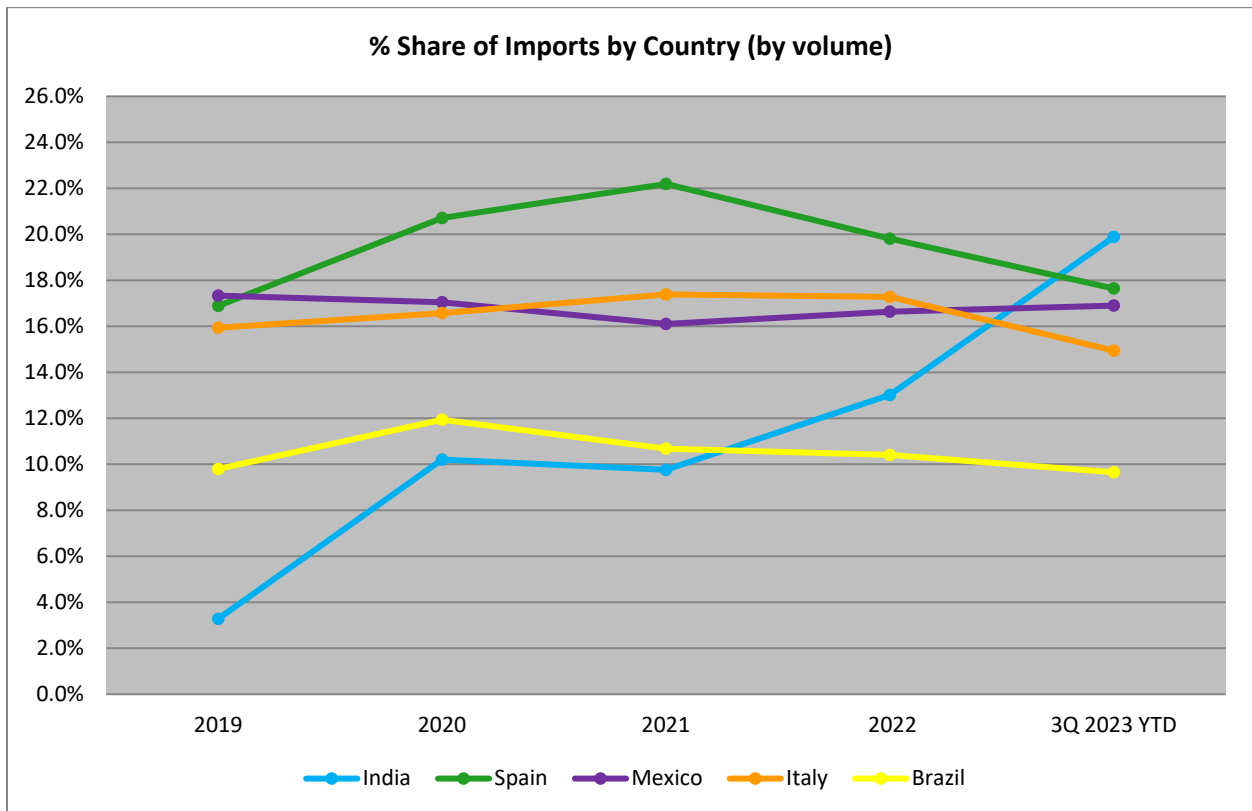
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The five countries from which the most tiles were imported 3Q 2023 YTD based on volume were:

Country	Sq. Ft. 3Q 2023 YTD	Sq. Ft. 3Q 2022 YTD	% Change
India	303,185,525	219,439,870	38.2%
Spain	269,023,414	356,540,583	-24.5%
Mexico	257,689,436	268,786,802	-4.1%
Italy	227,827,765	289,688,787	-21.4%
Brazil	147,120,546	178,245,814	-17.5%
All Countries	1,524,583,996	1,699,900,542	-10.3%



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Italy was the largest exporter by value (CIF + duty), comprising 28.2% of 3Q 2023 YTD U.S. tile imports, followed by Spain (26.2%) and Mexico (11.2%).

The five countries from which the most tiles were imported based on total U.S. \$ value (CIF + duty) 3Q 2023 YTD were:

Country	\$ Value 3Q 2023 YTD	\$ Value 3Q 2022 YTD	% Change
Italy	554,718,780	674,640,872	-17.8%
Spain	515,946,823	645,254,577	-20.0%
Mexico	220,826,736	198,543,987	11.2%
India	191,810,320	194,154,552	-1.2%
Turkey	142,637,533	205,447,390	-30.6%
All Countries	1,967,886,688	2,294,278,965	-14.2%

The average values of tile³ (including CIF + duty) from the five countries from which the most tiles were imported by volume 3Q 2023 YTD were:

Country	Sq. Ft. 3Q 2023 YTD	\$ Value 3Q 2023 YTD	Val/Sq. Ft. 3Q 2023 YTD	Val/Sq. Ft. 3Q 2022 YTD
India	303,185,525	191,810,320	\$0.63	\$0.88
Spain	269,023,414	515,946,823	\$1.92	\$1.81
Mexico	257,689,436	220,826,736	\$0.86	\$0.74
Italy	227,827,765	554,718,780	\$2.43	\$2.33
Brazil	147,120,546	126,569,796	\$0.86	\$0.84
All Countries	1,524,583,996	1,967,886,688	\$1.29	\$1.35

U.S. Shipments⁴

U.S. shipments (less exports) 3Q 2023 YTD were 657.4 million sq. ft., down 2.3% vs. 3Q 2022 YTD.

U.S. FOB factory sales (less exports) 3Q 2023 YTD were \$1.16 billion, up 3.9% vs. 3Q 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





The \$ value/sq. ft. of 3Q 2023 YTD U.S. shipments (less exports) was \$1.76, up from \$1.65 (3Q 2022 YTD).

U.S. Exports⁵

U.S. ceramic tile exports 3Q 2023 YTD decreased 1.8% by volume from 3Q 2022 YTD.

The two largest consumers of U.S. exports by volume were Canada (63.1% share) and Mexico (22.6% 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.

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⁵ U.S. Dept. of Commerce

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