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3Q 2022 U.S. Ceramic Tile Market Update

U.S. Tile Consumption Overview:

Through 3Q 2022, total U.S. ceramic tile consumption was up 1.3% by volume vs. 3Q 2021 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 2022 YTD	713,723	1,699,901	40,936	2,372,687	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
2018	940,300	2,196,935	29,746	3,107,489	1.5

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

**Note: Change vs. 3Q 2021 YTD

Imports²

Through 3Q 2022, the U.S. imported 1.70 billion sq. ft. of ceramic tile, up 1.3% from 3Q 2021 YTD.

Imports comprised 71.6% of 3Q 2022 YTD U.S. tile consumption by volume, down slightly from 71.7% in 2021.

Spain was the largest exporter by volume to the U.S. through 2Q 2022 with a 21.0% share of U.S. imports, followed by Italy (17.0%) and Mexico (15.8%).

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

² U.S. Dept. of Commerce

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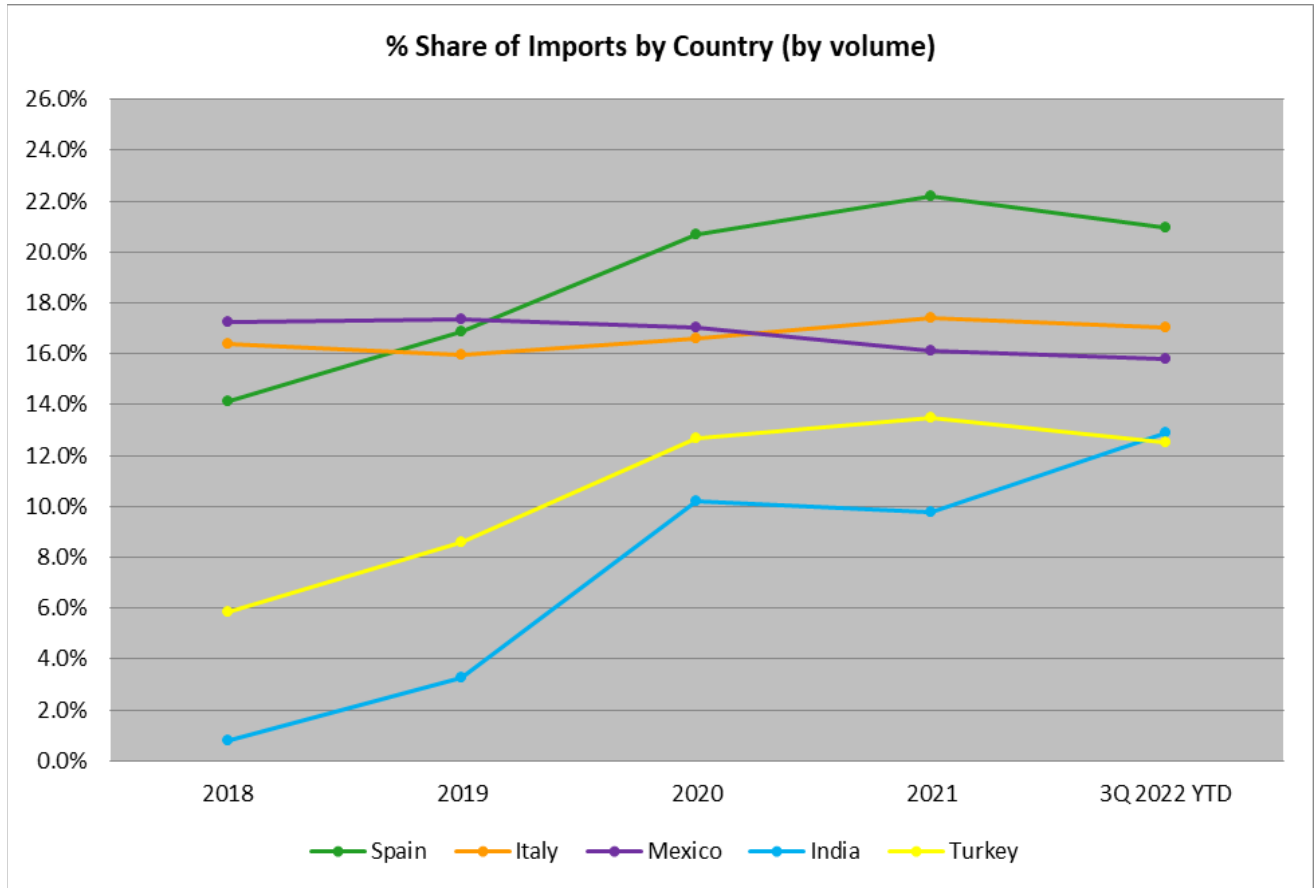
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The five countries from which the most tiles were imported 3Q 2022 YTD, based on volume, were:

Country	Sq. Ft. 3Q 2022 YTD	Sq. Ft. 3Q 2021 YTD	% Change
Spain	356,540,583	367,682,855	-3.0%
Italy	289,688,787	295,079,537	-1.8%
Mexico	268,786,802	279,766,808	-3.9%
India	219,439,870	169,019,787	29.8%
Turkey	212,906,198	215,043,663	-1.0%
All Countries	1,699,900,542	1,677,938,612	1.3%





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Italy was the largest exporter by value (CIF + duty), comprising 29.4% of 3Q 2022 YTD U.S. tile imports, followed by Spain (28.1%) and Turkey (9.0%).

The five countries from which the most tiles were imported based on total U.S. \$ value (CIF + duty) 3Q 2022 YTD were:

Country	\$ Val 3Q 2022 YTD	\$ Val 3Q 2021 YTD	% Change
Italy	674,640,872	594,976,419	13.4%
Spain	645,254,577	463,180,221	39.3%
Turkey	205,447,390	160,860,267	27.7%
Mexico	198,543,987	188,484,861	5.3%
India	194,154,552	125,312,563	54.9%
All Countries	2,294,278,965	1,855,774,914	23.6%

The average values of tile³ (including CIF + duty) from the five countries from which the most tiles were imported by volume 3Q 2022 YTD were:

Country	Sq. Ft. 3Q 2022 YTD	\$ Val 3Q 2022 YTD	Val/Sq. Ft. 3Q 2022 YTD	Val/Sq. Ft. 3Q 2021 YTD
Spain	356,540,583	645,254,577	\$1.81	\$1.26
Italy	289,688,787	674,640,872	\$2.33	\$2.02
Mexico	268,786,802	198,543,987	\$0.74	\$0.67
India	219,439,870	194,154,552	\$0.88	\$0.74
Turkey	212,906,198	205,447,390	\$0.96	\$0.75
All Countries	1,699,900,542	2,294,278,965	\$1.35	\$1.11

U.S. Shipments⁴

U.S. shipments (less exports) through 3Q 2022 were 672.8 million sq. ft., up 1.1% vs. 3Q 2021 YTD.

In dollar value, 3Q 2022 YTD U.S. FOB factory sales of domestic shipments were \$1.11 billion, up 8.4% vs. 3Q 2021 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 domestic shipments through 3Q 2022 was \$1.65, up from \$1.54 3Q 2021 YTD.

U.S. Exports⁵

U.S. ceramic tile exports through 3Q 2022 were 40.9 million sq. ft., up 46.1% vs. 3Q 2021 YTD.

The two largest consumers of U.S. exports by volume were Canada (68.5%) and Mexico (20.9%).

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.

⁵ U.S. Dept. of Commerce

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