

# 2010 State of the Ceramic Tile Industry and news from TCNA



The Tile Council of North America (TCNA) made a number of announcements at the Coverings show. Here are the highlights. Visit [www.tileusa.com/speechindex.htm](http://www.tileusa.com/speechindex.htm) for details on the following announcements.

## 2010 Ceramic tile industry update

Based on data available to date – actual 1Q-3Q 2010 U.S. shipment data and estimation of 4Q shipments – U.S. tile consumption for 2010 was 1.97 billion square feet.

The following table shows U.S. tile shipments, imports, exports, and total consumption in thousands of square feet.

<u>Year</u>	<u>U.S.</u>		<u>Exports</u>	<u>Total Consumption</u>	<u>% Change in Consumption from Previous</u>
	<u>Shipments</u>	<u>Imports</u>			<u>Year</u>
2010	617,631*	1,394,779	42,044	1,970,366*	6.0 *
2009	571,255	1,333,252	45,555	1,858,952	-18.1
2008	634,374	1,685,532	50,512	2,269,394	-15.2
2007	544,988	2,178,258	47,478	2,675,768	-19.3
2006	629,672	2,732,199	45,107	3,316,764	1.8

\*Note: Based on actual 1Q-3Q 2010 U.S. shipment data + an estimation of 4Q U.S. shipments.

- The U.S. imported 1.3 billion square feet of ceramic tile in 2010, up 4.6% from 2009 (1.33 billion square feet).
- Import penetration has fallen in each of the last four years; in 2010 it was estimated at 70.8%, the lowest level

since 1998.

- Top volume exporters to the U.S. in 2010 were: Mexico with a 27.8% share; China at 24.6% and Italy with a 17.9% share.
- In dollar value, Italy again held the top 2010 exporter position comprising 35.6% of U.S. imports; China accounted for 20.3% and Mexico 16.7%.

The top five exporting countries in 2010 based on square feet volume were:

COUNTRY	SQ FT 2010	SQ FT 2009	2010/2009 % Change	2009/2008 % Change
Mexico	387,678,293	374,298,957	3.6%	-10.8%
China	343,091,529	292,339,691	17.4%	-5.5%
Italy	250,092,602	234,771,586	6.5%	-39.2%
Brazil	89,550,633	107,466,268	-16.7%	-34.3%
Spain	70,701,917	76,637,815	-7.7%	-37.6%

The top five exporting countries in 2010 based on total U.S. dollar value (including duty, freight, and insurance) were:

COUNTRY	\$ VAL 2010	\$ VAL 2009	2010/2009 % Change	2009/2008 % Change
Italy	454,447,747	429,686,411	5.8%	-39.7%
China	258,682,812	216,275,919	19.6%	-7.5%
Mexico	213,044,823	205,035,537	3.9%	-24.4%
Spain	98,410,437	103,952,505	-5.3%	-37.6%
Brazil	61,410,415	71,287,697	-13.9%	-38.5%

Domestic shipments were estimated at 617.6 million square feet in 2010, up 8.1% from 2009. 2010 U.S. exports were at 42.0 million square feet, down 7.7% from 2009. Canada (55.3%) and Mexico (23.2%) made up the bulk of these volume exports. (Source: U.S. Commerce Dept.)

“Despite the difficulty of the past three years, our industry has a history of growth and success, and we fully expect that to continue, but at a lower level in the near future,” noted Eric Astrachan, TCNA executive director. “Prior to 2007, U.S. tile consumption increased eleven years in a row. That is a very good track record and demonstrates consumer desire for the value, durability, and quality ceramic tile provides.”

In addition, TCNA made the following announcements:

- The 2011 *TCNA Handbook for Ceramic*,

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*Glass and Stone Tile Installation* is completely updated and expanded from 84 to 296 pages, with more than 70 methods for glass tile and 57 adapted to stone, ANSI and ISO criteria, and a system of environmental classifica-



tion. Included is *Tile Is the Natural Choice*, updated to address installation materials, and a new directory of Certified Tile Installers (CTIs). For more information, visit: [www.tileusa.com/publication\\_main.htm](http://www.tileusa.com/publication_main.htm) or phone 864-646-8453.

- Work is continuing in the ANSIA108 Committee for the creation of a glass tile standard, *ANSI A137.2 American National Standard Specifications for Glass Tile*.
- *Green Squared<sup>SM</sup>*, the first draft of ANSI 138.1 North American standard specification for sustainable ceramic tiles, glass tiles and tile installation materials is currently under review by the ANSI A108 committee.
- A protocol is under development to any allergic reactions to tile and installation via inhalation or contact. The goal is a standard for certification that would allow a product to be marketed as hypoallergenic.
- The Porcelain Tile Certification Agency (PTCA) now claims 25 manufacturers and 225 lines qualifying for certification. PTCA certifies tile is true porcelain with .5% water absorption or less. Products that are certified can

display a unique PTCA logo on boxes and in corresponding literature.

- New Product Performance Testing Laboratory services include full ISO 13007 cementitious grout and mortar testing capabilities for international customers as well as modified ASTM C666: “Automated High Cycle Freeze/Thaw” stone testing, and ASTM C1721: “Petrographic Analysis of Dimension Stone.” Testing is offered for a number of “green” criteria as well.
- TCNA membership has grown in the U.S. and Mexico, now at an all-time high of 210 members which produce over 99% of the tile made in the U.S. and Canada and approximately 98% of the tile made in Mexico. All major U.S. setting material manufacturers are TCNA members.
- TCNA-Mexico membership has grown from five founding members in 2005 to more than 30 today. Recent developments include work in government relations towards eliminating illegal tile imports, installer training & certification including a new training center in Mexico City, a new instructional tile installation video, hosting the World Ceramic Tiles Manufacturers’ Forum, October 17-21, 2011 in Mexico City, expanded TCNA-Mexico pavilion at Expo CHIAC in 2011- the largest construction show in Mexico - and work with Green Building Council-Mexico to customize 80 of the 120 credits necessary for LEED certification to meet Mexico’s climatic and environmental needs.