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## 2009 CERAMIC TILE INDUSTRY UPDATE

For the third year in a row, U.S. tile consumption declined. This is the first time this has occurred since 1982, during the midst of the last major recession.

Total U.S. tile consumption for 2009 was 1.82 billion sq. ft. (-14.0% vs. 2008) - approximately the same consumption level as 1998.

(in thousands sq. ft.)

<u>Year</u>	<u>U.S. Shipments</u>	<u>Imports</u>	<u>Exports</u>	<u>Total Consumption</u>	<u>% Change in Consumption from Previous Year</u>
2009	534,987	1,333,252	45,555	1,822,684	-14.0
2008	484,999	1,685,532	50,512	2,120,019	-20.8
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
2005	658,198	2,638,359	37,022	3,259,535	3.5

### Imports:

In 2009, 1.33 billion sq. ft. (123.9 million sq. m) of ceramic tile arrived in the U.S. This was a decrease of 20.9% from 2008, in which 1.69 billion sq. ft. (156.6 million sq. m) of ceramic tile were imported into the U.S. Although imports still make up the majority of U.S. consumption, import penetration has fallen in each of the last three years and in 2009 was at 73.1% - the lowest it has been since 1999.

Mexico was the top exporter to the U.S. in 2009 (in sq. ft.) with a 28.1% share. This was up from 2008, in which it comprised 24.9% of U.S. tile imports. China held the second position, comprising 21.9% of imports (in sq. ft.), up from 18.4% in 2008. Italy was in third place with a 17.6% share, down from 22.9% in 2008.

On a dollar basis, Italy continued to hold the top exporter position in 2009, making up 35.7% of U.S. imports. The next two highest shares belonged to China and Mexico, which had 18.0% and 17.0% of the \$ value of U.S. imports, respectively.

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The top five countries from which tile was imported in 2009 based on sq. ft. were:

<b>COUNTRY</b>	<b>SQ FT 2009</b>	<b>SQ FT 2008</b>	<b>2009/2008 % Change</b>	<b>2008/2007 % Change</b>
Mexico	374,298,957	419,437,556	-10.8%	-4.7%
China	292,339,691	309,388,713	-5.5%	-11.9%
Italy	234,771,586	385,829,947	-39.2%	-26.3%
Brazil	107,466,268	163,690,919	-34.3%	-45.0%
Thailand	78,316,264	62,967,358	24.4%	-5.8%

The top five countries from which tile was imported in 2009 based on total U.S. \$ value (including duty, freight, and insurance) were:

<b>COUNTRY</b>	<b>TOT \$ VAL 2009</b>	<b>TOT \$ VAL 2008</b>	<b>2009/2008 % Change</b>	<b>2008/2007 % Change</b>
Italy	429,686,411	712,177,454	-39.7%	-19.9%
China	216,275,919	233,701,821	-7.5%	3.6%
Mexico	205,035,537	271,111,707	-24.4%	3.1%
Spain	103,952,505	166,538,897	-37.6%	-35.0%
Brazil	71,287,697	115,877,348	-38.5%	-37.7%

### **U.S. Shipments:**

While overall tile consumption declined in 2009, consumption of domestic tile increased 10.3% vs. 2008, according to the U.S. Commerce Dept. The 2009 domestic shipment total of 535 million sq. ft. (49.7 million sq. m) was approximately the same level as in 2007.

### **Exports:**

U.S. exports in 2009 were at 45.6 million sq. ft. (4.2 million sq. m), down 9.8% vs. 2008. The vast majority of these exports (in sq. ft.) were to Canada (54.0%) and Mexico (26.2%).

(Source: U.S. Commerce Dept.)

### **Outlook:**

“Despite these past three very difficult years for our industry, there are positive indicators the worst of the economic disaster has past, and the market is set to rebound. We have seen

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economic growth the past two quarters, some stabilization in the labor market, and historically low mortgage rates. We are hopeful 2010 will bring the first increase in tile consumption in four years,” said Andrew Whitmire, trade data analyst for Tile Council of North America.

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