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US Collection

Ceramic Tile: United States

March 2019



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About This Report

Scope

This report forecasts to 2023 US ceramic tile demand in square feet. Total demand is also forecasted in nominal US dollars at the manufacturer level. Total demand is segmented by application in terms of:

- flooring
- wallcoverings
- countertops
- other applications such as bath and shower surrounds, fireplace surrounds and backings, and ceiling coverings

Total demand is also segmented by market as follows:

- new residential
- residential improvement and repair
- new commercial
- commercial improvement and repair
- transport equipment and nonbuilding construction

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; total demand by value and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Excluded from the scope of this report are roofing tiles, vinyl tiles, and carpet tiles.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Ceramic Tile: United States (FF60068) is based on *Decorative Tile*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications

About This Report

- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Ceramic Tile

| NAICS/SCIAN 2007 | | SIC | |
|---|---|------------------------------------|--------------------------------|
| North American Industry Classification System | | Standard Industrial Classification | |
| 327120 | Clay building material and refractories manufacturing | 3251 | Brick and structural clay tile |
| 327122 | Ceramic wall and floor tile manufacturing | 3253 | Ceramic wall and floor tile |
| | | 3259 | Structural clay products, nec |

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

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historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Decorative Tile

Freedonia Industry Studies

Countertops Market in the US

Decorative Laminates Market in the US

Global Countertops Market

Global Flooring

Global Housing

Home Kitchen & Bathroom Remodeling in the US

Outdoor Furniture & Grills Market in the US

Outdoor Kitchen Equipment Market in the US

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Countertops: United States

Decorative Laminates: United States

Decorative Tile: United States

Flooring: United States

Housing: United States

Nonresidential Building Construction: United States

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Trade Publications

Ceramic World Review

Floor Covering Weekly

Floor Focus

TILE Magazine

Agencies & Associations

American National Standards Institute

ASTM International

International Organization for Standardization

National Association of Home Builders

Tile Council of North America

United States Census Bureau

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission