

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Decorative Tile

US Industry Study with Forecasts for **2011 & 2016**

Study #2285 | January 2008 | \$4500 | 257 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	4
Demographic Trends	8
Population	9
Households	12
Consumer Income & Spending	12
Personal Income & Expenditures	13
Consumer Financing	15
Building Construction Outlook	19
Residential Construction	23
Housing Completions	25
Housing Stock	29
Improvement & Repairs	31
Nonresidential Construction	32
Office & Commercial Construction ..	35
Institutional Construction	35
Industrial Construction	36
Transportation & Other Nonresidential Building Construction	37
Improvements & Repairs	37
Historical Market Trends	38
Pricing	40
Environmental Issues & Regulatory Considerations	43
Foreign Trade	46
World Market	50
Western Europe	52
Asia/Pacific Region	54
Other Regions	55

PRODUCTS

General	58
Value Outlook	60
Area Outlook	63
Installation Costs	66
Ceramic Tile	68
Characteristics	71
Suppliers	74

Porcelain Tile	76
Characteristics	78
Suppliers	81
Glass Tile	82
Characteristics	85
Suppliers	88
Other Tile	89
Natural Stone	90
Concrete	93
Metal	95

APPLICATIONS

General	97
Flooring	102
Flooring Outlook	102
Tile Demand	104
Characteristics	107
Residential Construction	108
Nonresidential Construction	110
Competitive Materials	112
Wall Coverings	113
Wall Coverings Outlook	113
Tile Demand	116
Characteristics	119
Residential Construction	121
Nonresidential Construction	122
Competitive Materials	124
Countertops	126
Countertops Outlook	126
Tile Demand	129
Characteristics	132
Residential Construction	134
Nonresidential Construction	136
Competitive Materials	136
Other Applications	139

MARKETS

General	144
Residential	146
New	148
Tile Demand by Room & Housing Type	149

Tile Demand by Product & Application	153
Improvements & Repairs	156
Tile Demand by Room & Housing Type	157
Tile Demand by Product & Application	161
Nonresidential	165
New	168
Tile Demand by Product	170
Tile Demand by Application	171
Improvements & Repairs	172
Tile Demand by Product	173
Tile Demand by Application	175
Building Type	177
Office & Commercial	178
Institutional	178
Industrial	179
Transportation & Other Nonresidential Building	179

INDUSTRY STRUCTURE

General	180
Industry Composition	183
Market Share	185
Mohawk Industries	186
Marazzi Group	186
Grupo Porcelanite	186
Internacional de Ceramica	187
Florim Ceramiche	187
Shaw Industries	187
Crossville	188
Others	188
Competitive Strategies	188
Research & Development	191
Manufacturing	191
Distribution	193
Marketing	195
Mergers & Acquisitions & Cooperative Agreements	198

(continued on next page)

Table of Contents

(continued from previous page)

COMPANY PROFILES

Armstrong World Industries	200
Artflor Incorporated	201
Azuvi SA.....	202
Berkshire Hathaway.....	203
Castle & Cooke	205
Cecrisa Revestimentos Ceramicos	206
Ceramica Carabobo	208
Ceramica Saloni	209
Corporacion Empresarial Roca.....	210
Crossville Incorporated	213
Edge Flooring	215
Ege Seramik Sanayi ve Ticaret	216
Eliane Revestimentos Ceramicos	217
Epro Incorporated	218
Florida Brick & Clay	219
Florida Tile Industries	220
Florim Ceramiche SpA	222
Grupo Industrial Saltillo.....	224
Grupo Lamosaq	225
Grupo Porcelanite	227
Gruppo Ceramiche Ricchetti	229
Internacional de Ceramica	231
Iris Ceramica	233
Ironrock Capital.....	236
Mannington Mills	237
Marazzi Group.....	239
Mohawk Industries	242
Oceanside Glasstile.....	246
Pamesa Ceramica.....	247
Porcelanosa Grupo.....	248
Portobello SA	250
Quarry Tile	251
Sandhill Industries	252
Seneca Tiles	253
Smith-Laredo.....	254
Sonoma Tilemakers.....	255
Summitville Tiles	256

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators	8
2 Resident Population.....	9
3 Personal Income & Expenditures	15
4 Consumer Financing Environment, 1996-2006	19
5 Building Construction Expenditures	23
6 Residential Construction Expenditures	25
7 Housing Indicators	29
Cht Year of Construction of Housing Stock, 2006.....	31
8 Residential Improvement & Repair Expenditures.....	32
9 Nonresidential Construction Expenditures	34
10 Nonresidential Improvement & Repair Expenditures.....	38
11 Decorative Tile Market, 1996-2006.	40
12 Tile Pricing Trends.....	43
13 Decorative Tile Foreign Trade	49
Cht Tile Imports by Country, 2006	49
Cht Tile Exports by Destination, 2006 ..	50

PRODUCTS

1 Tile Demand by Type in Value Terms	62
Cht Tile Demand by Type in Value Terms, 2006	63
2 Tile Demand by Type in Area Terms	65
Cht Tile Demand by Type in Area Terms, 2006.....	66
3 Ceramic Tile Demand by Type & Application	71
4 Porcelain Tile Demand by Type & Application.....	78
5 Glass Tile Demand	85
6 Other Tile Demand by Type & Application	90

APPLICATIONS

1 Tile Demand by Application	100
Cht Tile Demand by Application, 2006: Value Versus Area	101
2 Floor Covering Supply & Demand	104
3 Flooring: Tile Demand by Market & Product	106
4 Wall Coverings Supply & Demand .	116
5 Wall Coverings: Tile Demand by Market & Product	119
6 Countertop Demand.....	128
7 Countertops: Tile Demand by Market & Product	132
8 Other Applications: Tile Demand by Market & Product	143

MARKETS

1 Tile Demand by Market.....	146
2 Residential Tile Demand by Market & Product	148
3 New Residential Tile Demand by Room & Housing Type.....	153
4 New Residential Tile Demand by Product & Application.....	156
5 Residential Improvement & Repair Tile Demand by Room & Housing Type.....	161
6 Residential Improvement & Repair Tile Demand by Product & Application.....	165
7 Nonresidential Tile Demand by Market & Product	168
8 New Nonresidential Tile Demand by Product & Application.....	169
9 Nonresidential Improvement & Repair Tile Demand by Product & Application.....	173
10 Nonresidential Tile Demand by Building Type	177

INDUSTRY STRUCTURE

1 US Decorative Tile Revenues for Selected Manufacturers, 2006...	182
Cht Decorative Tile Market Share, 2006.....	185

Gains in nonresidential flooring uses will be driven by more appreciation of the tile's attributes, such as slip resistance, ease of installation and minimal maintenance requirements.

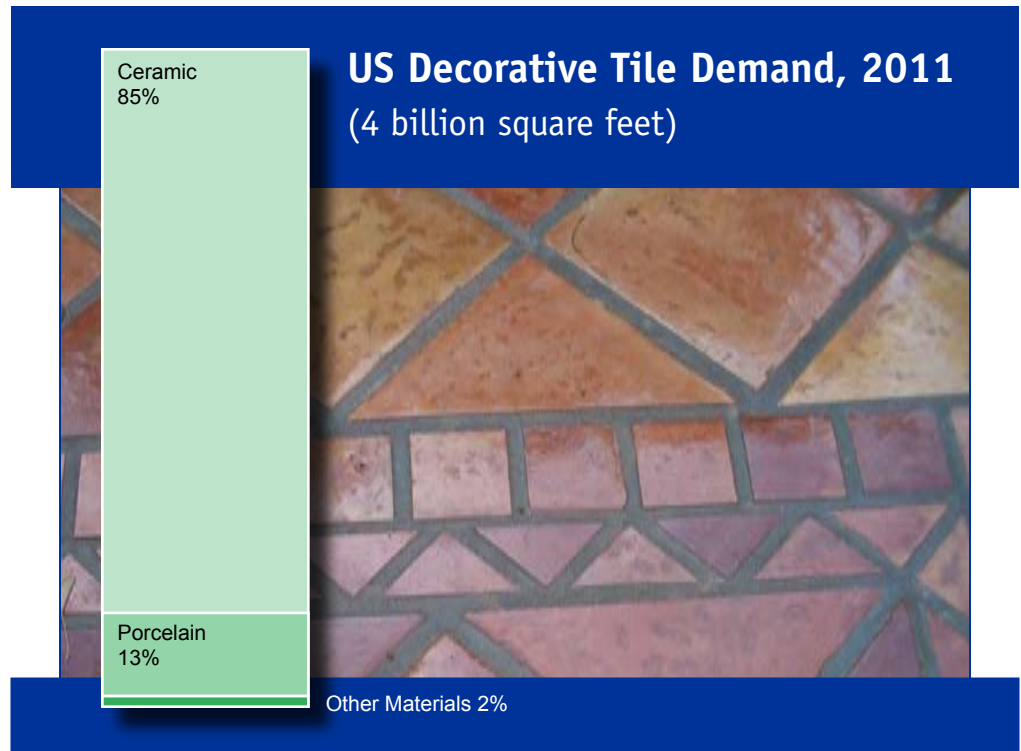
US demand to grow 4.3% annually through 2011

Overall, demand for decorative tile is forecast to increase 4.3 percent per year to four billion square feet in 2011. Demand is dominated by flooring applications, which accounted for nearly four-fifths of total tile demand in 2006, and which will continue to spur demand for decorative tile, as consumer preferences shift away from carpets and rugs. Flooring demand for tile is expected to increase 5.0 percent per annum through 2011 to 3.3 billion square feet. Gains will be particularly strong in nonresidential flooring applications, driven by an increased appreciation of the performance qualities of tile, such as slip resistance, ease of installation, minimal maintenance requirements, and lower cost than other high-end flooring materials. In the residential market, growth will be driven by remodeling activity, as homeowners seek to replace old and worn floors with modern, aesthetically pleasing tile styles.

Nonresidential market to offer superior prospects

Demand for decorative tile in the non-residential construction market will offer superior prospects. Decorative tile can be installed in such structures as malls, airports, office buildings, retail outlets, and other municipal and commercial buildings, with uses including flooring, wall coverings, countertops and backsplashes, and other applications. In

US Decorative Tile Demand, 2011 (4 billion square feet)



addition to providing durability and moisture-resistance, decorative tile is seen as a modern, fashionable surfacing material. Demand will also be promoted by continued spending on residential kitchen and bathroom renovation, the two areas of a home where decorative tile is most likely to be installed. Increases in the size of kitchens and bathrooms will also spur tile demand.

Porcelain tile to account for strongest gains

Porcelain will account for the strongest gains of any tile material through 2011, posting annual increases of 9.5 percent. Demand for porcelain tile will be driven by its aesthetic advantages. Porcelain

tile is more durable than ceramic tile, and it can be fired to resemble natural stone, making it popular in both residential and nonresidential applications. Growth will also be driven by increased use of porcelain tiles with through-body color properties. These tiles will draw increasing acceptance in the nonresidential market because if damaged, the tiles only need to be sanded, rather than replaced, greatly reducing costs. While ceramic tile will account for the vast majority of demand in flooring applications in both value and area terms, porcelain tile will post the fastest growth rates through 2011, primarily due to increased use of tiles with through-body color properties.

Copyright 2008 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

APPLICATIONS

Tile Demand

Demand for decorative tile in countertops is forecast to slightly to 65 m Growth w surfacing surfacing and luxuri about bio While the tiles is a highly porous material that is susceptible to bact other types of contamination unless it is thoroughly cleaned. about these health issues will lead homeowners and property ers to consider other surfacing materials with less porous sur Other surfacing materials, such as laminates, solid surface, a and engineered stone, do not require time-consuming care and are more resistant to contamination. Finally, the decline in new housing comple- tions, and a deceleration in residential kitchen and bathroom spending, will also work to suppress demand for decorative tile in countertops.

However, several factors will drive growth. The low cost of tile will make it attractive to value-conscious homeowners and most nonresi- dential consumers. Decorative tile can be made in virtually any size or color, making it possible to create individually styled kitchen, bathroom or other countertops. Tile remains ideal for bathroom and kitchen ap- plications due to its durability and moisture resistance. Growth will also be driven by increased use of decorative tile as a backsplash material. Tile backsplashes face less exposure to stains and dirt, and thus are less likely to become contaminated compared to such materials as granite or natural stone. In the high-end residential market, many consumers use porcelain, glass or metal tiles, as well as standard ceramic tiles, to create highly decorative backsplashes that serve as "showpieces" for guests.

129

Copyright 2007 The Freedonia Group, Inc.

TABLE III-3

CERAMIC TILE DEMAND BY TYPE & APPLICATION
 (million square feet)

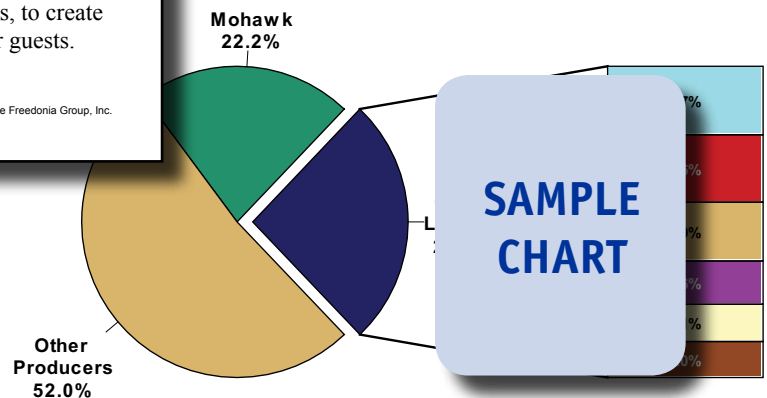
Item	1996	2001	2006	2011	2016
Tile Demand					7,095
% ceramic					2.4
Ceramic Tile Demand					20.0
By Type:					
Glazed					0.0
Unglazed					0.0
By Application:					
Flooring					5.0
Wall Coverings					4.0
Countertops					7.5
Other					3.5
\$/square foot					88
Ceramic Tile Demand (mil \$)					95

SAMPLE TEXT

SAMPLE TABLE

CHART VI-1

DECORATIVE TILE MARKET SHARE, 2006
 (\$4.1 billion)

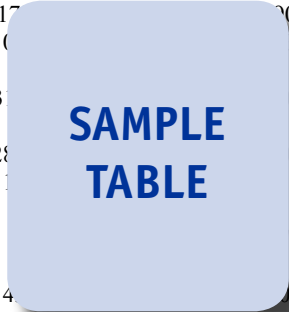


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-4
NEW RESIDENTIAL TILE DEMAND
BY PRODUCT & APPLICATION
(million square feet)

Item	1996	2001	2006	2011	2016
New Housing Units (000s)	17	17	17	17	17
sq ft tile/new housing unit	6	6	6	6	6
New Residential Tile Demand	3	3	3	3	3
By Product:					
Ceramic	28	28	28	28	28
Porcelain					
Glass					
Other					
By Application:					
Flooring	14	14	14	14	14
Wall Covering	153.0	171.5	231.0	215.0	239.5
Countertops	10.2	12.5	16.8	14.7	15.0
Other	4.8	5.0	5.2	5.3	5.5



COMPANY PROFILES

Crossville Incorporated
 346 Sweeney Drive
 Crossville, TN 38555
 931-484-2110
<http://www.crossvilleinc.com>

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Crossville Incorporated (Crossville Tile Group Incorporated) is a manufacturer of porcelain, glass and specialty tiles for residential and commercial wall and floor applications. The Company sells its products through a network of independent dealers and distributors in North America.

The Company participates in the US tile industry through the production and sale of porcelain, glass and specialty tiles for residential and commercial applications. Porcelain tiles are sold through the PORCELAIN STONE, DESIGN SOLUTIONS and TUMBLED NATURALS product lines. PORCELAIN STONE tiles are durable, stain-resistant tiles with hues and surface textures that resemble natural stone. These tiles can have polished or unpolished surface finishes, and are offered in small-size varieties for making mosaic-type surfaces, as well as standard larger-sized areas. PORCELAIN STONE tiles are ideal for interior and exterior walls, as well as interior floors. Types of PORCELAIN STONE tiles include the AMERICANA, CRONOS, EMPIRE, POMPEII and WEATHERSTONE XT series.

DESIGN SOLUTIONS porcelain tiles are light-colored tiles designed for use in bathrooms and powder rooms. These tiles have subtle

213 Copyright 2007 The Freedonia Group, Inc.

“Demand for decorative tile in residential improvement and repair applications is forecast to advance 4.9 percent per year to 1.8 billion square feet in 2011. This deceleration will result from the slow-down in residential improvement and repair expenditures, as consumers delay, reduce the scope of, or eliminate altogether home improvement projects.”

--Section V, pg. 156

OTHER STUDIES

Solid Surface & Other Cast Polymers

This study analyzes the US market for solid surface materials and other cast polymers. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., solid surface, engineered stone, synthetic stone veneer); end use (e.g., countertops, sinks); material (e.g., marble, quartz, acrylic, polyester, alumina trihydrate, fillers, colorants); and US region. The study also considers market environment factors, evaluates company market share and profiles leading industry competitors.

#2319 03/2008..... \$4500

Molding & Trim

US demand for molding and trim will reach \$11 billion in 2011. Gains will be supported by healthy nonresidential construction activity, especially in office and commercial buildings. Interior moldings will remain the largest product segment, while plastic molding and trim continues to supplant wood materials. This study analyzes the US molding and trim industry, with forecasts for 2011 and 2016 by material, product and market. The study also evaluates market share and profiles leading producers.

#2286 12/2007..... \$4500

Residential Kitchen & Bathroom Countertops

US countertop demand will reach 540 million square feet in 2011, driven by the remodeling segment. Engineered stone and natural stone countertops will grow the fastest while laminate countertops will remain the market leader. Kitchen countertops will continue to outpace bathroom types. This study analyzes the \$12.7 billion US residential kitchen and bath countertop industry, with forecasts for 2011 and 2016 by material, product, market and region. It also evaluates market share and profiles major players.

#2237 10/2007..... \$4500

Hard Surface Flooring

US demand for hard surface flooring will grow 3.9% annually through 2011. Gains will be driven by growing consumer preference for high-end flooring like wood, laminates and ceramic tile, as well as growing interest in natural products such as natural stone, engineered wood, linoleum, cork and bamboo. This study analyzes the 9.9 billion square foot US hard surface flooring market, with forecasts for 2011 and 2016 presented by product and market. The study also details market share and profiles major firms.

#2209 06/2007..... \$4400

Decorative Laminates

US sales of decorative laminates will grow 3.8% annually through 2011, driven by increased demand for laminate flooring, store fixtures and wall panels. Decorative foils and saturated papers will pace the dominant low-pressure laminate segment, while high-pressure laminates will lead gains. This study analyzes the US decorative laminate industry, with forecasts for 2011 and 2016 given by raw material, production process, product and market. It also evaluates company market share and profiles major firms.

#2203 06/2007..... \$4400

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)