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Decorative Tile

US Industry Study with Forecasts for **2013 & 2018**

Study #2580 | December 2009 | \$4800 | 282 pages

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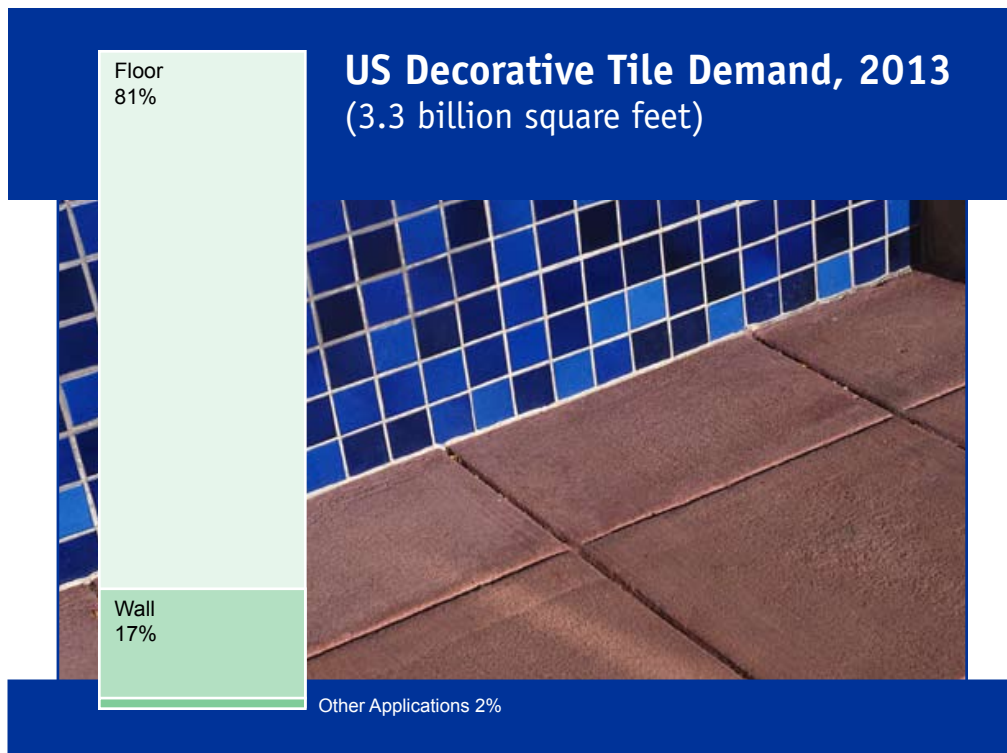
Homeowners are attracted to tile flooring because of its aesthetic properties, durability, minimal maintenance requirements, long life span, and resistance to stains and impact damage.

US demand to increase 3.3% yearly through 2013

US demand for decorative tile is forecast to increase 4.4 percent per year to 3.3 billion square feet in 2013. Flooring applications accounted for 81 percent of total tile demand in 2008, and 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 4.5 percent annually through 2013 to 2.7 billion square feet. Gains will be boosted by the residential market, as housing completions rebound and consumer spending on improvement and repair projects increases. Homeowners are attracted to tile flooring because of its aesthetic properties, durability, minimal maintenance requirements, long life span, and resistance to stains and impact damage. In value terms, demand for decorative tile is projected to increase 5.5 percent per year to \$5.1 billion in 2013. Value gains will be driven by increased sales of porcelain, glass and other specialty tile types, which are significantly more expensive than traditional ceramic tile.

Porcelain, natural stone tiles to see fastest gains

Porcelain and natural stone tiles will account for the fastest gains of all tile types through 2013. Demand for porcelain tile will be driven by its aesthetic advantages. Porcelain tile is more durable than ceramic tile, and can be fired to resemble natural stone, making it



a less-costly alternative to genuine stone tiles. Demand for natural stone tiles will be spurred by interest for stone surfaces in mid-range and high-end residences. However, ceramic tile will continue to account for the vast majority of tile demand in both value and area terms through 2013, primarily due to its low cost.

Residential market to outpace nonresidential

The residential construction market will generate the most rapid gains in tile demand. Advances will be spurred by a rebound in housing completions from the low levels experienced in 2008. Further gains will be promoted by spending on

kitchen and bathroom renovation projects. Tile is marketed to homeowners who want surfaces that are easy to care for. In addition to providing durability and moisture-resistance, decorative tile is seen as a modern, fashionable surfacing material that is easy to clean.

The nonresidential building construction market for tile will see slower growth than the residential market. Advances will mainly be derived from the improvements and repairs market, as building owners and property managers replace worn and older floors with tile surfaces. Designers and architects will opt for tile due to its durability, minimal maintenance requirements and slip resistance.

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Sample Text, Table & Chart

MARKETS

Nonresidential

Demand for decorative tile in the nonresidential construction market is forecast to advance 7.7 billion square feet in 2013, valued at \$1.1 billion by the interior design and repair market. Property managers will use tile due to its low maintenance requirements, its long life span, and its ability to be installed in high-traffic areas. Tiles are installed in a wide variety of applications, and they are an important consideration for building managers and commercial architects. Many building operators will install porcelain tiles with through-body color. These tiles feature excellent slip resistance, making them suitable for buildings in areas subject to rain or snow. Tiles with through-body color can be used in commercial structures, as if they are scuffed, the tiles do not need to be replaced. Moreover, tile is perceived as a high-end surfacing material for malls, retail areas, public facilities and other areas that cater to the public. Gains will also be derived from rising use of tile in health care and educational facilities due to its resistance to biological contaminants.

Gains will also be promoted by use of tile as a green building material. Many building owners and property managers will seek to make their structures more environmentally friendly. In addition to earning LEED points during construction or renovation projects, tile surfaces are seen as green building materials in other ways. Decorative tile is far more durable than many other surfacing materials, such as carpet and vinyl flooring, and paint and wallpaper wall coverings. Tile surfaces are not damaged enough to require replacement, keeping materials out of landfills and water streams. Also, tile surfaces can be cleaned with common household cleaners, reducing the amount of harmful chemicals going into water streams. Thus, as builders and designers of commercial buildings look for ways to reduce the environmental footprint of their projects, they will more often utilize tile surfacing as a way to do so.

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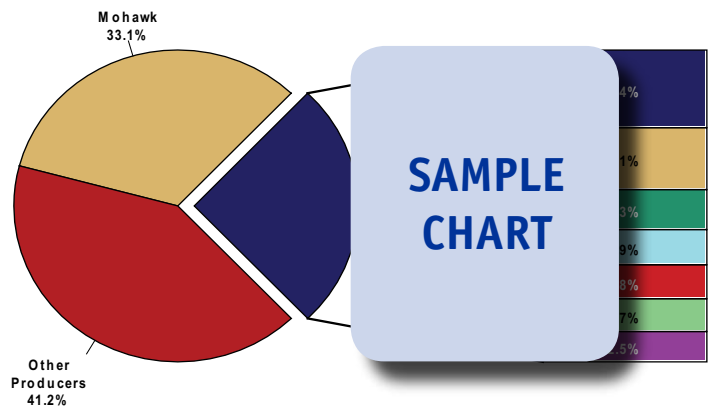
TABLE III-3
CERAMIC TILE DEMAND
 (million square feet)

| Item | 1998 | 2003 | 2008 | 2013 | 2018 |
|------------------------------|------|------|------|------|------|
| Tile Demand | | | | | 30 |
| % ceramic | | | | | 0 |
| Ceramic Tile Demand | 1 | | | | 0 |
| By Type: | | | | | |
| Glazed | 1 | | | | 0 |
| Unglazed | 2 | | | | 0 |
| By Application: | | | | | |
| Flooring | 10 | | | | 0 |
| Wall Coverings | 4 | | | | 0 |
| Countertops | | | | | 5 |
| Other | | | | | 5 |
| \$/square foot | | | | | 8 |
| Ceramic Tile Demand (mil \$) | | | | | 5 |

SAMPLE TABLE

CHART VI-1

US DECORATIVE TILE MARKET SHARE, 2008
 (\$3.9 billion)

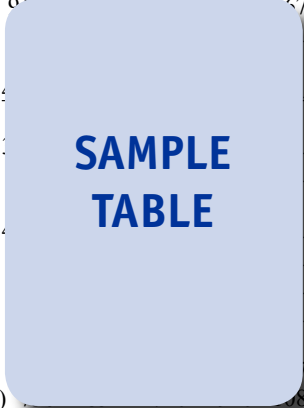


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-5
TILE DEMAND IN WALL COVERINGS
(million square feet)

| Item | 1998 | 2003 | 2008 | 2013 | 2018 |
|--|-------|-------|-------|-------|-------|
| Wall Coverings Demand | 9,100 | 9,200 | 9,300 | 9,400 | 9,500 |
| % tile | 1 | 1 | 1 | 1 | 1 |
| Tile Demand in Wall Coverings | 9,100 | 9,200 | 9,300 | 9,400 | 9,500 |
| By Market: | | | | | |
| Residential | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Nonresidential | 7,100 | 7,200 | 7,300 | 7,400 | 7,500 |
| By Product: | | | | | |
| Ceramic | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Porcelain | 7,100 | 7,200 | 7,300 | 7,400 | 7,500 |
| Glass | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| Other | 0 | 0 | 0 | 0 | 0 |
| \$/square foot | 1 | 1 | 1 | 1 | 1 |
| Tile Demand in Wall Coverings (mil \$) | 9,100 | 9,200 | 9,300 | 9,400 | 9,500 |



COMPANY PROFILES

Ilva SA

Parque Industrial Pilar
 Ruta Eight Km 60, Calle 9
 Buenos Aires
 Argentina
 54-02-322-529-000
<http://www.ilva.com>

Annual Sales:
 Employment:

Key Products:

Ilva is a manufacturer of decorative wall and floor tiles. The Company is privately held.



The Company is active in the US tile industry through the production and sale of porcelain tiles for use as wall and floor coverings in residential and commercial settings. These tiles, which are offered in a variety of sizes and colors, are resistant to chemicals, ultraviolet light, abrasions, thermal shock, frost and stains. Ilva's porcelain tiles are manufactured in glazed and through-body, rectified styles. Glazed porcelain tiles are marketed through the ELEMENTI, FIORENTINO, ART, LANDSCAPES, MARMI, OPERA, OXIDE, PAESINA, PIETRA TRAVERTINE, RIFLESSI and SOHO product lines, while through-body, rectified porcelain tiles are sold through the ANDES, CREMA MARFIL and PATCH collections. The Company also produces a variety of specialty trims and decorative pieces, including listel, insert, border, bullnose, stair tread, sink rail, quarter-round and corner types.

In May 2008, the Company introduced ECOLAND through-body, rectified porcelain tiles, which contain up to 20-percent recycled

"... glass tiles are ideal for use as borders, decorative inserts and highlights, and other wall surfaces. Many homeowners and building managers use glass tile to highlight or accent certain wall areas. Through 2013, demand for glass tiles used in wall covering applications is forecast to advance 3.6 percent annually to 17.1 million square feet. Gains will be spurred by continued consumer interest in creating aesthetically pleasing wall surfaces."

--Section IV, pg. 120

OTHER STUDIES

World Countertops

This study analyzes the global countertop industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by material (e.g., laminates, solid surface materials, natural stone, engineered stone), market (e.g., new and remodeled kitchen and bathroom), world region (e.g., Asia/Pacific, North America, Western Europe) and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2585 01/2010 \$5800

Countertops

US demand for countertops is forecast to rise 2.4% yearly through 2013. Products made from engineered and natural stone will grow the fastest while laminates remain the largest segment. The residential market will remain dominant based on a rebound in housing construction and continued consumer interest in high-value countertops. This study analyzes the 674 million square foot US countertop industry, with forecasts for 2013 and 2018 by material and market. It also evaluates market share and profiles industry players.

#2552 09/2009 \$4800

Hard Surface Flooring

US hard surface flooring demand will rise 4.6% yearly through 2013. Growth will be driven by ongoing gains on carpeting and the popularity of high-end and "green" materials. Laminate and wood flooring will offer the best opportunities, while new niche products such as bamboo, cork and eucalyptus flooring enjoy good prospects. This study analyzes the 7.7 billion square foot US hard surface flooring industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2493 07/2009 \$4700

Decorative Laminates

Sales of decorative laminates in the US are forecast to reverse their downward trend and grow 2.1% annually through 2013. Gains will be sparked by increased demand from the flooring industry, while cabinets remain the leading market. The smaller high-pressure laminate segment will outpace the dominant low-pressure overlay market. This study analyzes the \$6.4 billion US decorative laminate industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2511 06/2009 \$4700

Wall Coverings

US wall coverings demand will reverse 2003-2008 declines and grow 4.2% annually through 2013. Decorative tile and finished gypsum board will be the fastest growing segments, with the tile market matching wall paneling demand by 2013. Wallpaper will make a long-awaited recovery based on new and improved products. This study analyzes the \$1.9 billion US wall coverings industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.

#2473 05/2009 \$4600

About The Freedonia Group

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