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Decorative Tile

US Industry Study with Forecasts for **2017 & 2022**

Study #3014 | April 2013 | \$4900 | 297 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

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Gains will be driven by a rebound in new housing, office and commercial construction and the increasing use of tile as a durable, low maintenance flooring alternative to carpets and rugs.

US demand to rise 5.1% annually through 2017

US demand for decorative tile is forecast to rise 5.1 percent per year through 2017, reaching 3.0 billion square feet, valued at \$5.3 billion. Gains will be driven by a rebound in building construction spending. The new housing market will see double-digit annual demand growth as housing completions rise from their low 2012 base. Nonresidential demand will also rise at a robust pace, spurred by strong growth in office and commercial construction spending and increasing use of tile as a durable, low maintenance flooring alternative to carpets and rugs.

Dominant ceramic tile to lose market share

Ceramic tile accounted for the largest share of decorative tile demand in 2012 and is expected to remain the leading product type in 2017. Ceramic tile demand is supported by its low cost, and perception as a modern, fashionable surfacing material. However, ceramic tile will lose market share going forward to stone and porcelain tile, which are seen as having better aesthetic and performance properties.

Natural stone to overtake porcelain as second largest

Natural stone tiles are expected to overtake porcelain tiles as the second

US Decorative Tile Demand, 2017 (3.0 billion square feet)



largest type in area demand terms by 2017. Gains will be spurred by strong residential demand for natural stone flooring. Homeowners are increasingly opting for granite tile flooring because granite is an attractive, durable material that improves the appearance of a room and increases home values. Moreover, natural stone flooring can also be installed in such structures as hotels, high end resorts, and shopping malls to create more aesthetically pleasing interiors.

Porcelain tile demand will advance over seven percent per annum through 2017, gaining share in both residential and nonresidential markets. Porcelain tiles are durable, slip-resistant, and can be

made to resemble such materials as hardwood and natural stone, but at a lower cost. Homeowners can install porcelain tile as an inexpensive way to enhance the appearance of their homes. Gains will also come from increasing use of the product in nonresidential structures, where unglazed porcelain tile finds use in areas with heavy foot traffic, such as shopping malls, office buildings, and health care and educational facilities. However, more rapid growth will be checked by competition from natural stone flooring, particularly in the residential market, as more affluent homeowners opt for stone because it connotes luxury.

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Sample Text, Table & Chart

PRODUCTS

Stone Tile

Demand for natural stone tile in area terms is projected to increase to 1.5 billion square feet in 2017, up from 1.2 billion square feet in 2012. Demand is projected to increase 3.3 percent annually as building construction recovers from the math of the 2007-2009 recession. Builders will continue to economize on building costs by using stone tile flooring and ceramic tile flooring.

Going forward, rising residential building construction spending will spur demand. Advances in housing completions will produce demand, as builders install stone tile floors in their homes to provide a more luxurious appearance that attracts potential buyers. The improvement and repair market, which was the largest end use for stone tile in 2012, will remain the leading market in 2017, as homeowners looking to enhance the interior appearance of their properties will install stone tile surfaces. For instance, a homeowner installing a granite countertop in his or her kitchen may be more likely to add a complementary-colored granite tile floor to create a kitchen with a more natural or traditional décor.

Nonresidential demand for stone tile will be spurred by the rebound in nonresidential building construction spending. Increases in the number of such structures as hotels, resorts, casinos, corporate headquarters, and other facilities where a high end or natural appearance is desired will boost demand for stone tile. Other consumers will opt for stone tile because of its durability and resistance to damage caused by wear and impacts.

Demand for stone tile in both the residential and nonresidential markets will be spurred by continuing high levels of stone tile

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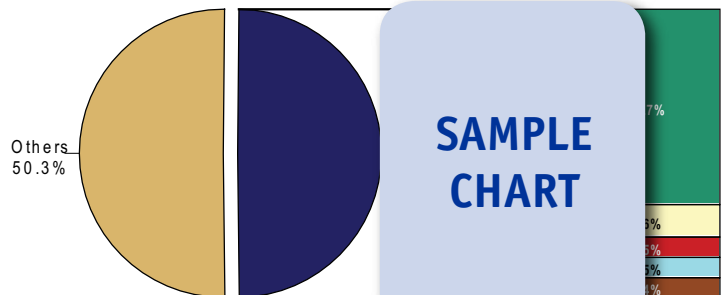
TABLE IV-3

TILE DEMAND IN FLOORING
(million square feet)

Item	2002	2007	2012	2017	2022
Hard Surface Flooring Demand (bil sq ft)	1.5	1.5	1.5	1.5	1.5
% tile	6	6	6	6	6
Tile Demand in Flooring	0	0	0	0	0
By Market:					
Residential	0	0	0	0	0
Nonresidential	5	5	5	5	5
Nonbuilding & Transportation	5	5	5	5	5
By Product:					
Ceramic	0	0	0	0	0
Porcelain	0	0	0	0	0
Stone	0	0	0	0	0
Other	0	0	0	0	0
\$/square foot	3	3	3	3	3
Tile Demand in Flooring (mil \$)	20	20	20	20	20

CHART VI-1

US DECORATIVE TILE MARKET SHARE BY COMPANY
(\$3.6 billion, 2012)

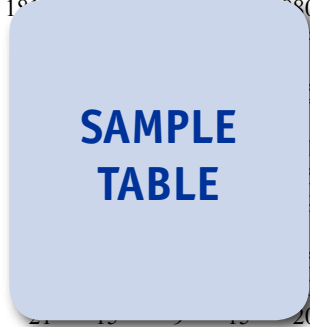


Sample Profile, Table & Forecast

TABLE V-3

NEW RESIDENTIAL TILE DEMAND BY ROOM & HOUSING TYPE
(million square feet)

Item	2002	2007	2012	2017	2022
New Housing Units (000)	190	200	200	200	200
000 sq ft tile/new housing units					
New Residential Tile Demand					
By Room:					
Kitchen					
Bathrooms					
Other Rooms					
By Housing Type:					
Single-Family					
Multiunit					
Manufactured Housing					



COMPANY PROFILES

Pamesa Ceramica SL
 Cno. Alcora 8
 Apartado de Correos 14
 Almazora, Castellon 12550
 Spain
 34-96-450-7500
 http://www.pa

Annual Sales: (2/13)
 Employment:
 Key Products:

Pamesa Ceramica SL is a Spanish ceramic and porcelain floor and wall tile manufacturer.

The Company is active in the US tile industry through the manufacture and marketing of glazed and unglazed ceramic and porcelain floor and wall tiles. These tiles are produced in a variety of colors and sizes, including such decorative accent pieces as borders, moldings, listels, inserts, and medallions. In addition, tiles are offered with glass, matte, satin, polished, semi-polished, rectified, and nonrectified surface finishes.

Pamesa Ceramica's ceramic and porcelain tiles are marketed through the DECORSTONE, AGATHA RUIZ DE LA PRADA, COMPACGLASS, COMPACTTO PEDRA, COMPACTTO TÉCNICO, LUXGLASS, PASTA ROJA, and PASTA BLANCA product lines. For example, the DECORSTONE collection includes porcelain floor tiles printed with digital technologies to resemble natural stone. These tiles

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"In 2012, ceramic tile accounted for 292 million square feet, or 70 percent, of new residential decorative tile demand. Demand for ceramic tile in new residential building construction applications is forecast to rise nearly 10 percent annually to 469 million square feet in 2017. Growth will be spurred by the rise in housing completions and continuing user interest in ceramic tile."

--Section V, pg. 163

OTHER STUDIES

Decorative Laminates

Demand for decorative laminates in the US will rise 4.1 percent per year to 11.9 billion square feet in 2018. Of the two largest markets, cabinets will outpace furniture based on a rebound in residential construction spending. Within the dominant low-pressure laminate segment, vinyl films and saturated papers will be the fastest growing types. This study analyzes the 9.8 billion square foot US decorative laminates industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.
 #3127 February 2014 \$5100

Countertops

US demand for countertops is forecast to increase 5.1 percent per year to 750 million square feet in 2017. Natural stone and engineered stone will be among the fastest growing countertop materials, while laminates will remain the largest product category. The new residential building market will post the most rapid gains. This study analyzes the 585 million square foot US countertop industry, with forecasts for 2017 and 2022 by material, product, and market. The study also evaluates company market share and profiles industry competitors.
 #3049 July 2013 \$5300

Hard Surface Flooring

US demand for hard surface flooring will rise 5.0 percent per year to 9.3 billion square feet in 2017. Vinyl will remain the largest product segment and will grow the fastest, followed by tile and wood. The residential market will outpace nonresidential uses, with remodeling and replacement applications remaining the largest segment. This study analyzes the 7.2 billion square foot US hard surface flooring industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry competitors.
 #3037 June 2013 \$5100

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to \$86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the \$51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.
 #2995 February 2013 \$5100

World Flooring & Carpets

World flooring and carpet demand will rise 4.9 percent yearly to 18.6 billion square meters in 2016. The Asia/Pacific region will see the most rapid growth. Nonresidential buildings will be the fastest growing market, while nonresilient flooring will pace products. North America will offer the best prospects for carpets and rugs. This study analyzes the 14.6 billion square meter world flooring and carpet industry, with forecasts for 2016 and 2021 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.
 #2981 January 2013 \$6300

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