

# Decorative Tile

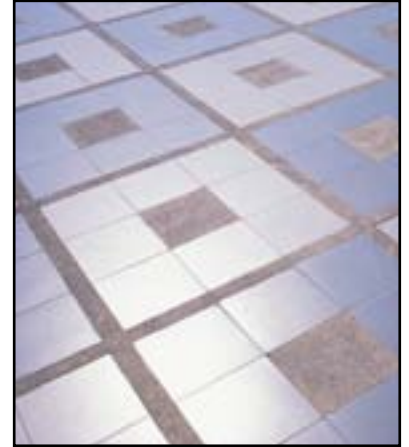
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## US Industry Study with Forecasts for 2020 & 2025

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Study #3393 | March 2016 | \$5200

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### Building construction expenditures to drive decorative tile demand

Growth in building construction expenditures will drive advances for US demand in decorative tile through 2020. The residential market is expected to post faster gains than the nonresidential market, bolstered by healthy increases in housing completions and continued interest in kitchen and bathroom renovation projects. In the nonresidential market, rebounding institutional building expenditures and growth in office and commercial building spending will drive decorative tile demand gains.

### More decorative tiles made in US by 2020

Foreign trade plays a crucial role in the US decorative tile industry. The majority of decorative tiles can be made more cheaply abroad due to low cost labor structures and better access to raw materials, and as a result four-fifths of US tile demand in 2015 was imported. Through 2020, however, imports' share of the market is expected to fall as foreign producers expand their decorative tile manufacturing capacity in the US in order to fulfill domestic orders more quickly and to create products specifically tailored to the tastes of US consumers.

### TPT growth to spur porcelain tile gains

Porcelain tile is expected to register the fastest growth in area demand terms through 2020. The rise in popularity of thin porcelain tile (TPT) will especially bolster demand. TPT's larger size and light weight, as well as performance attributes including resistance to scratches and cracking,

make it a popular choice in both residential and commercial markets.

Ceramic tile will continue to account for the largest share by far. Ceramic tile remains the most popular type of tile in both residential and nonresidential applications because of its affordability and low maintenance requirements. However, ceramic tile will continue to lose market share going forward to higher value alternatives such as porcelain and stone tile.

### Flooring to remain dominant application

Flooring is the predominant application for decorative tile, and demand is expected to grow faster than any other application through 2020. In the residential market, gains will be boosted by consumer interest in tile flooring in kitchens, bathrooms, dining rooms, and foyers, both in new housing and in renovation projects. Decorative tile flooring also appeals to construction professionals and building managers in the nonresidential market because of its durability, low maintenance requirements, and slip resistance.

### Study coverage

This study analyzes the US decorative tile market. It offers historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product, application and market. The study also considers key market environment factors, assesses the industry structure, analyzes company market share and profiles 33 US industry players including Florim Ceramiche, Crossville, Internacional de Ceramica, Shaw Industries and Mohawk.

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## APPLICATIONS

**Demand by Market** -- The residential market accounted for the largest share of decorative tile flooring demand in 2015 with 54 percent of the total. Tile demand in the residential market recorded an average gain between 2010 and 2015, driven by rebounding residential building construction expenditures. Tile demand was supported by consumer interest in tile flooring, particularly low cost ceramic and porcelain tile, as an inexpensive alternative to such materials as hardwood and natural stone tile flooring. For many home builders and owners, decorative tile flooring was a low cost way to improve the appearance and value of their properties.

Residential demand for tile flooring is expected to grow at a rate of 1.5 percent per year through 2020, reaching 1.5 percent of the total. Demand will be boosted by continued strong growth in new homes that installed tile flooring between 2010 and 2015, and will do so going forward. Value conscious consumers will opt for ceramic or porcelain tile because of their low cost compared to hardwood or natural stone tile flooring, while home builders catering to a more affluent clientele may opt for porcelain or natural stone tile for their favored aesthetics.

Tile demand in the residential segment will also be boosted by the improvement and repair market. In the aftermath of the 2007-2009 recession, many homeowners canceled home improvement projects and reduced their scale. Going forward, a rise in personal incomes will allow homeowners who may have delayed such projects as the renovations of kitchens and bathrooms to finally undertake them. Consumers increasingly desire houses with larger kitchens and more and larger bathrooms. Decorative tile is often installed in these rooms because of its moisture and slip resistance, durability, and favorable aesthetics. Homeowners will also install tile flooring in other areas, such as foyers and dining rooms.

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## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE III-5

### NATURAL STONE TILE DEMAND (million square feet)

Item	2005	2010	2015	2020	2025
Decorative Tile Demand % stone					
Stone Tile					
By Type:					
Granite					
Marble, Travertine, & Other					
By Application:					
Flooring					
Wall Coverings					
Countertops					
Other					
\$/square foot					
Stone Tile Demand (mil \$)					

Source: The Freedonia Group

TABLE V-9

### NONRESIDENTIAL IMPROVEMENT & REPAIR DECORATIVE TILE DEMAND (million square feet)

Item	2005	2010	2015	2020	2025
Nonresidential Building I&R (bil 2009\$) sq ft tile/000\$ I&R					
Nonresidential Building I&R Tile Demand					
By Product:					
Ceramic					
Porcelain					
Stone					
Other					
By Application:					
Flooring					
Wall Covering					
Countertops					
Other					

Source: The Freedonia Group

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## Related Studies

### World Solid Surface & Other Cast Polymers

Global demand for cast polymers will rise 6.6 percent yearly to 246 million square meters in 2019, with a value of \$23.1 billion. The Asia/Pacific region will remain the largest and fastest-growing market. Solid surface will remain the dominant type while engineered quartz, marble and other stone will grow the fastest. This study analyzes the 179 million square meter world cast polymer industry, with forecasts for 2019 and 2024 by type and application for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

#3335..... October 2015..... \$6400

### Countertops

Demand for countertops in the US is forecast to increase 4.2 percent annually to 810 million square feet in 2019, valued at \$29.3 billion. Engineered stone, natural stone and various niche surfaces will be the fastest growing countertop materials. The dominant residential market will offer the best growth opportunities. This study analyzes the 660 million square foot US countertop industry, with forecasts for 2019 and 2024 by surface material, product, application, and market. The study also evaluates company market share and profiles industry competitors.

#3301..... August 2015..... \$5500

### World Countertops

Global demand for countertops is forecast to rise 4.2 percent per year to 503 million square meters in 2018. The Asia/Pacific region will remain the largest and fastest growing market. While the nonresidential market will post faster gains, the much larger residential segment will provide the most growth in demand. This study details the 409 million square meter world countertop industry, with forecasts for 2018 and 2023 by material, market, application, product, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3250..... February 2015..... \$6300

### World Flooring & Carpets

Through 2018, global demand for floor coverings is forecast to advance 4.5 percent annually to 19.4 billion square meters, valued at \$325 billion. Nonresilient flooring will remain the dominant product segment and will grow the fastest. China and the United States will be the two fastest growing major markets. This study analyzes the 15.5 billion square meter world flooring and carpet industry, with forecasts for 2018 and 2023 by product, market, world region, and for 20 countries. The study also evaluates company market share and profiles industry players.

#3227..... December 2014..... \$6500

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

## About The Freedonia Group

The Freedonia Group 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 and other world markets. Industries analyzed by Freedonia include:

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