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ABSTRACT FOR THE CATALINA REPORT ON CERAMIC TILE

SUMMARY OF MAJOR FINDINGS

The \$2.0 billion U.S. ceramic tile market began to recover during 2010 and the recovery is expected to continue into 2011. The rebound is being led by growth in the residential remodeling and replacement market. The builder market could also begin to increase, however, this market will continue to be hampered by the foreclosure situation and a rising residential vacancy rate. Nonresidential markets may show a slight gain in 2011 since vacancy rates in this sector also remains high. The upturn in U.S. demand is being aided by declining average ceramic tile prices. Declining average prices has contributed to ceramic tile regaining some share of the U.S. floor coverings market as consumers continue to seek out value-priced flooring. The price drop is being led by cuts in average prices shipped from U.S. plants. This has increased their share of U.S. ceramic tile sales. However, low-cost tiles manufacturers in Mexico and China also gained share.

CERAMIC TILE MARKET TRENDS

Catalina Research uncovered these trends in our 205-page report on the U.S. ceramic tile industry. Report sections cover the U.S. market on a dollar and square foot basis. Catalina has calculated ceramic tile's position in the U.S. floor coverings industry and the hard surface flooring market. Catalina also conducted a comparative analysis of ceramic and other flooring material prices.

SOURCE OF SUPPLY

Separate sections evaluate U.S. shipments and imports. Data is segmented by tile size and whether the tile is glazed or unglazed. Import shipments are tracked by country of origin. As part of our analysis, Catalina calculated U.S. tile sales by country of origin. There is also an analysis of tile pricing by country source, as well as insurance, freight, and tariff costs faced by importers. In addition, Catalina reviewed the product strategies of the major competitors including the introduction of porcelain tiles and stone looks, and investments in new U.S. production capacity.

END-USE MARKETS AND FACTORS AFFECTING DEMAND

Ceramic tile sales are provided for residential and nonresidential markets and for new construction and remodeling markets. End-use market trends are correlated with U.S. housing demand, homeowner hard surface replacement projects and spending, characteristics of new homes, nonresidential construction spending, mortgage interest rates, and other economic indicators to uncover the factors driving demand and provide insights into the direction of domestic demand in 2011 and beyond.



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DISTRIBUTION CHANNELS AND CONSUMER DEMOGRAPHICS

Ceramic tile distribution is analyzed by type of outlet. The specialty floor covering store and home center channels are evaluated to indicate the shifts in industry sales channels. In addition, the tile contractor business is evaluated by type of building and by region and state. Catalina analyzed household spending on hard surface flooring products by household income, age of household head, household size, and region to point to important target markets.

WORLDS MARKETS AND U.S. EXPORTS

Catalina analyzed world output, and the tile market in major producing and consuming countries. The manufacturing base and domestic demand were reviewed for the Chinese, Brazilian, Indian, Italian, Spanish, Mexican, and other markets. Catalina also calculated global market shares for twenty leading manufacturers. U.S. exports are analyzed by product and major country of destination. In addition, Catalina reviewed Canadian import trends.

COMPETITIVE ENVIRONMENT AND PLANT PROFIT MARGINS

In addition, Catalina Research examined the cost structure and profitability of U.S. ceramic tile plants. Data trends are compiled for material, labor, and capital inputs. Catalina supplemented industry data with profiles and sales of 14 leading U.S.- and foreign-based manufactures. Catalina used this data to calculate leading manufacturer market shares. Company profiles cover product lines and new products, manufacturing and distribution, capital investments, and acquisitions. Executives are urged to review the growth- and profit-oriented strategies of leading worldwide ceramic tile manufactures and compare their company's own performance to the industry averages.

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