

# US MARKET ANALYSIS

# CERAMIC TILE

---

## Book I

### MACROECONOMIC ANALYSIS

#### INTRODUCTION

##### 1. OUTLOOK U.S.

1.1 Macro-economic indicators summing-up

##### 2. DEMOGRAPHICS DATA

2.1. Housing

2.1.1 New privately owned housing units started by region

2.1.1.1 New privately owned housing units started

2.1.1.2 U.S. residential building construction by region/types

2.1.2 New privately owned housing units authorized by region

2.1.3 New mult-family buildings completed by region: number of building & units

2.1.4 Average square feet of new mult-family buildings completed by region

2.1.5 Average square feet of new one-family houses completed by region

##### 3. MACROECONOMIC DATA

3.1 Gross domestic product

3.2 Personal savings rate

3.3 Unemployment rate

3.4 Interest rates

# US MARKET ANALYSIS

## CERAMIC TILE

---

#### **4. CONSTRUCTION SECTOR**

- 4.1 Sectorial outlook.
- 4.1.1 World construction
  - 4.1.1.1 Overview
  - 4.1.1.2 General outlook
- 4.1.2 USA outlook
- 4.1.3 How housing affect the U.S. economy
  - 4.1.3.1 Housing's impact on GDP
  - 4.1.3.2 Taxes, wages, jobs created by housing
  - 4.1.3.3 Spend on a newly purchased home
- 4.1.4 Sales of new and existing homes
- 4.1.5 Home prices
  - 4.1.5.1 New home prices
  - 4.1.5.2 Existing home prices
- 4.1.6 Top 40 metro markets for single-family permits in first 9 months
- 4.1.7 New single-family home characteristics.
  - 4.1.7.1 New mult-family home characteristics
- 4.1.8 Correlations analysis
- 4.2 Industrial production index for clay building material & others
- 4.3 Producer price index: long term trends

# US MARKET ANALYSIS

## CERAMIC TILE

---

## Book II

### SUPPLY & DISTRIBUTION CHANNELS

#### 1. SUPPLY

- 1.1. Ceramic tile sectorial overview
  - 1.1.1 Operating ratios and margins
- 1.2. Plants concentration
  - 1.2.1 State & regional distribution of ceramic tile plants by employee size
- 1.3. Index of the U. S. ceramic market
- 1.4. Descriptive picture of main U.S. Competitors
  - 1.4.1 Mohawk industries
  - 1.4.2 Interceramic
  - 1.4.3 Berkshire hathaway
  - 1.4.4 Florida tile
  - 1.4.5 Laufen international
  - 1.4.6 United States ceramic tile
  - 1.4.7 Crossville
  - 1.4.8 Florim
  - 1.4.9 Others competitors
- 1.5. New plants & dominance concentration
- 1.6. New plants

#### 2. PERFORMANCE APPRAISAL OF THE MARKETING FACTORS

- 2.1. Advertising
  - 2.1.1 Advertising messages that cut through the clutter
  - 2.1.2 Advertising ideas for distributors with & without tile show-rooms
  - 2.1.3 Distributor's decision to advertise
  - 2.1.4 Control positioning with design
  - 2.1.5 The advertising budget
  - 2.1.6 Media decisions
  - 2.1.7 Sales increase with advertising
  - 2.1.8 A professional industry
  - 2.1.9 Advertising to repeat (trade) customers
  - 2.1.10 When start

# US MARKET ANALYSIS

## CERAMIC TILE

---

- 2.2. Sales regions
- 2.2.1 Proposal of region sales area
- 2.3. How freight cost affect the choice of tile based on distributors opinion
- 2.4. Selection factors when retailers choice suppliers

### **3. ANALYSIS BY TYPE OF CHANNEL**

- 3.1. Distribution channel players
- 3.2. Distribution channel for distributors
  - 3.2.1 Sales sold direct to consumer through show-room
  - 3.2.2 Imported x domestic tile; distributors mix of purchase
- 3.3. Sales growth of the floor covering stores
- 3.4. Number of the floor covering stores by region
- 3.5. The 100 best & big retail and wholesalers companies in U.S.
- 3.6. Understanding the U.S. ceramic tile distribution channel
- 3.7. Profile of the main U.S. home centers
  - 3.7.1 Home Depot
  - 3.7.2 Lowe's companies.

# US MARKET ANALYSIS

# CERAMIC TILE

---

## Book III

## MARKET ANALYSIS

### INTRODUCTION

#### 1. MARKET

- 1.1 World's overview
  - 1.1.1 Ceramic tile world production.
  - 1.1.2 Top markets
  - 1.1.3 Top manufacturing countries
  - 1.1.4 Per capita average consumption of ceramic tile in the world
  - 1.1.5 Per capita average consumption
  - 1.1.6 Evolution of the apparent consumption of ceramic tile in U.S.
- 1.2 Internal market size
- 1.3 Market share: U.S. ceramic tile industry
- 1.4 Market supply
  - 1.4.1 Wall & floor tile – dollar volume
  - 1.4.2 Wall & floor tile by type– dollar volume
  - 1.4.3 Ceramic wall & floor tile: sq. ft.
  - 1.4.4 Wall & floor tile by type
- 1.5 Domestic shipments of ceramic wall & floor tile
  - 1.5.1 Domestic shipments of ceramic wall & floor tile
  - 1.5.2 Domestic shipments of ceramic wall & floor tile by type
  - 1.5.3 Domestic shipments of glazed wall & floor tile by type: sq. ft
  - 1.5.4 Domestic shipments of ceramic wall & floor tile by type
  - 1.5.5 Domestic shipments of glazed wall & floor tile by type

# US MARKET ANALYSIS

## CERAMIC TILE

---

### 2. PRODUCT ANALYSIS

- 2.1 Types of ceramic tile sold in the market
  - 2.1.1 Ceramic wall tile size most frequently sold
  - 2.1.2 Ceramic floor tile size most frequently sold
- 2.2 Porcelain tile market.
  - 2.2.1 Porcelain tile
  - 2.2.2 Porcelain tile sales
  - 2.2.3 Porcelain tile sales
  - 2.2.4 Production and apparent consumption of porcelain tile in U.S.
  - 2.2.5 Porcelain tile manufacturers in the world
- 2.3 Colors trends
  - 2.3.1 Color's trend analysis
- 2.4 American consumer preferences last year
  - 2.4.1 Finishing
  - 2.4.2 Sizes
  - 2.4.3 Abrasion resistance
  - 2.4.4 U.S. regional preferences

### 3. PRICES

- 3.1 Prices of domestic X imported products.
  - 3.1.1 Prices of imported products - USD – value per sq. ft.
- 3.2. Prices of imported ceramic tile by country of origin
  - 3.2.1 Prices by country of origin - USD / m<sup>2</sup>
  - 3.2.2 Domestic and imported prices evolution
- 3.3 Domestic shipments prices of all ceramic tile
- 3.4 Domestic shipments prices of glazed ceramic tile

### 4. CRITICAL FACTORS OF SUCCESS

- 4.1 Ceramic wall & floor tile benchmarking
- 4.2 Competitive advantages
  - 4.2.1 Developing countries competition

# US MARKET ANALYSIS

## CERAMIC TILE

---

### 5. IMPORTS

- 5.1 Import share over internal apparent consumption
- 5.2 Imports of ceramic wall & floor tile evolution
  - 5.2.1 Imports of ceramic tile evolution by type of product
  - 5.2.2 Imports of ceramic tile by type of product
  - 5.2.3 Imports of ceramic tile evolution by type of product
- 5.3 Main importing countries: USD million
  - 5.3.1 Main importing countries: % in value
  - 5.3.2 Main importing countries: sq.ft. million
  - 5.3.3 Main importing countries: sq.ft. (%)
  - 5.3.4 Main importing countries of glazed tiles, cubes & similar ceramic articles
    - 5.3.4.1 Main importing countries of glazed tiles, cubes & similar ceramic articles
    - 5.3.4.2 Main importing countries of glazed tiles, cubes & similar ceramic articles
    - 5.3.4.3 Main importing countries of glazed tiles, cubes & similar ceramic articles
    - 5.3.4.4 Main importing countries of other glazed ceramic flags, paving, tiles, mosaic cubes
    - 5.3.4.5 Main importing countries of glazed ceramic flags, paving, tiles, mosaic cubes
    - 5.3.4.6 Main importing countries of unglazed ceramic tiles
- 5.4 How to export for U.S.
  - 5.4.1 Direct sales
  - 5.4.2 Some clients to start your penetration in U.S. market
  - 5.4.3 Local agent
  - 5.4.4 Regional sales areas

### 6. EXPORTS

- 6.1 Exports: value, sq.ft and prices evolution
- 6.2 Main export markets for U.S. ceramic tile: USD thousands
  - 6.2.1 Main export markets for U.S. ceramic tile: sq.ft. thousands

### 7. CONCLUSIONS AND TENDENCIES

- 7.1 What we can foresee for the short-terms future
- 7.2 U.S. tile consumption increase; prices decline