Ceramic tile from India

Investigation No. 701-TA-720 (Final)

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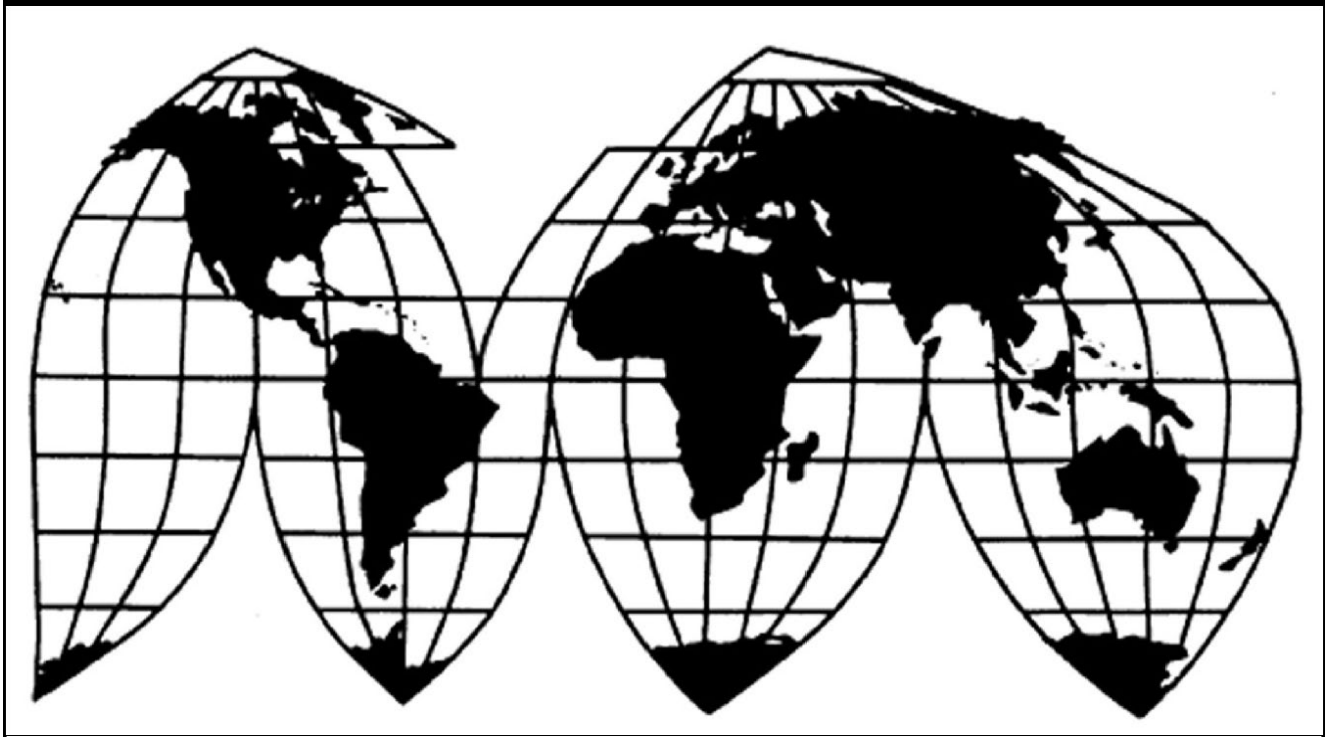
U.S. International Trade Commission



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Note.—Information that would reveal confidential operations of individual firms may not be published. Such information is identified by brackets ([ ]) in confidential reports and is deleted and replaced with asterisks (***) in public reports. Zeroes, null values, and undefined calculations are suppressed and shown as em dashes (—) in tables. If using a screen reader, we recommend increasing the verbosity setting.

UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation 701-TA-720 (Final)

Ceramic tile from India

DETERMINATION

On the basis of the record[1] developed in the subject investigation, the United States International Trade Commission ("Commission") determines, pursuant to the Tariff Act of 1930 ("the Act"), that an industry in the United States is threatened with material injury by reason of imports of ceramic tile from India, provided for in subheadings 6907.21.10, 6907.21.20, 6907.21.30, 6907.21.40, 6907.21.90, 6907.22.10, 6907.22.20, 6907.22.30, 6907.22.40, 6907.22.90, 6907.23.10, 6907.23.20, 6907.23.30, 6907.23.40, 6907.23.90, 6907.30.10, 6907.30.20, 6907.30.30, 6907.30.40, 6907.30.90, 6907.40.10, 6907.40.20, 6907.40.30, 6907.40.40, and 6907.40.90 of the Harmonized Tariff Schedule of the United States, that have been found by the U.S. Department of Commerce ("Commerce") to be subsidized by the government of India.[2]

BACKGROUND

The Commission instituted this investigation effective April 19, 2024, following receipt of a petition filed with the Commission and Commerce by Coalition for Fair Trade in Ceramic Tile.[3] The Commission scheduled the final phase of the investigation following notification of a preliminary determination by Commerce that imports of ceramic tile from India were being subsidized within the meaning of section 703(b) of the Act (19 U.S.C. 1671b(b)). Notice of the scheduling of the final phase of the Commission's investigation and of a public hearing to be

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[1] The record is defined in § 207.2(f) of the Commission's Rules of Practice and Procedure (19 CFR 207.2(f)).

[2] 90 FR 17036 (April 23, 2025).

[3] The Coalition for Fair Trade in Ceramic Tile is comprised of Crossville, Inc., Crossville, TN; Dal-Tile Corporation, Dallas, TX; Del Conca USA, Inc., Loudon, TN; Wonder Porcelain, Lebanon, TN; Landmark Ceramics – UST, Inc., Mount Pleasant, TN; Florim USA, Clarksville, TN; Florida Tile, Lexington, KY; Portobello America Manufacturing LLC, Pompano Beach, FL; and StonePeak Ceramics Inc., Chicago, IL.

held in connection therewith was given by posting copies of the notice in the Office of the Secretary, U.S. International Trade Commission, Washington, DC, and by publishing the notice in the *Federal Register* of December 20, 2024 (89 FR 104206). The Commission conducted its hearing on April 17, 2025. All persons who requested the opportunity were permitted to participate.

Views of the Commission

Based on the record in the final phase of this investigation, we determine that an industry in the United States is threatened with material injury by reason of imports of ceramic tile from India found by the U.S. Department of Commerce ("Commerce") to be subsidized by the government of India.

I. Background

The petitions in these investigations were filed on April 19, 2024, by the Coalition for Fair Trade in Ceramic Tile ("Coalition" or "Petitioner").[1] Several members of the Coalition appeared at the Commission's hearing accompanied by counsel, and Petitioner submitted prehearing and posthearing briefs.[2] MS International, Inc. ("MSI"), an importer of subject merchandise from India, is the only respondent in the investigation. Counsel to MSI appeared at the Commission's hearing, and it submitted prehearing and posthearing briefs.[3]

U.S. Industry data are based on the questionnaire responses of ten domestic producers that accounted for the vast majority of domestic production of ceramic tile in 2023.[4] U.S. import data are based on official Commerce import statistics and the questionnaire responses of 19 U.S. importers, which in 2023 accounted for *** percent of subject imports and *** percent of nonsubject imports.[5] Foreign industry data are based on the questionnaire responses of 20 producers/exporters of ceramic tile in India whose exports accounted for *** percent of subject imports in 2023.[6]

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[1] The Coalition consists of the following nine members: Crossville, Inc.; Dal-Tile Corporation; Del Conca USA, Inc.; Wonder Porcelain; Landmark Ceramics - UST, Inc.; Florim USA; Florida Tile; Portobello America Manufacturing LLC; and StonePeak Ceramics Inc.

Petitioner also filed an antidumping duty petition on ceramic tile from India. However, Commerce made a final negative determination in its antidumping investigation of ceramic tile from India. *Ceramic Tile from India: Final Negative Determination of Sales at less Than Fair Value and Final Negative Determination of Critical Circumstances*, 90 Fed. Reg. 17036 (Apr. 23, 2025). On April 30, 2025, the Commission accordingly terminated its antidumping investigation concerning ceramic tile from India.

[2] Petitioner's Prehearing Br., EDIS Doc. 848438 (Apr. 10, 2025); Petitioner's Posthearing Br., EDIS Doc. 849652 (Apr. 24, 2025).

[3] MSI's Prehearing Br., EDIS Doc. 848418 (Apr. 10, 2025); MSI's Posthearing Br., EDIS Doc. 849598 (Apr. 24, 2025).

[4] Confidential Staff Report, INV-XX-060 (May 8, 2025) ("CR") at 1.4.; *Ceramic Tile from India*, Inv. No. 701-TA-720 (Final), USITC Pub. 5630 (June 2025) ("PR") (together, "CR/PR").

[5] CR/PR at 4.1. Data on the overall volume of imports during the POI are based on official Commerce import statistics. *See id.* at Tables 4.2 & C.1. Additional data, such as imports by type, polish, and side precision, are based on U.S. importer questionnaires. *See, e.g.*, *id.* at Table 4.7.

[6] CR/PR at Tables 4.2, 7.1, & 7.10. In the preliminary phase of the investigation, the Commission received foreign producer questionnaire responses from 138 producers and/or exporters in India whose exports accounted for nearly all U.S. imports of ceramic tile from India in 2023. *See* Preliminary Phase Staff Report, INV-WW-052 (May 24, 2024), EDIS Doc. No. 822258 at VII-3. Because foreign industry data (Continued...)

II. Domestic Like Product

A. In General

In determining whether an industry in the United States is materially injured or threatened with material injury by reason of imports of subject merchandise, the Commission first defines the "domestic like product" and the "industry."[7] Section 771(4)(A) of the Tariff Act of 1930, as amended ("the Tariff Act"), defines the relevant domestic industry as the "producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product."[8] In turn, the Tariff Act defines "domestic like product" as "a product which is like, or in the absence of like, most similar in characteristics and uses with, the article subject to an investigation."[9]

By statute, the Commission's "domestic like product" analysis begins with the "article subject to an investigation," *i.e.*, the subject merchandise as determined by Commerce.[10] Therefore, Commerce's determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value is "necessarily the starting point of the Commission's like product analysis."[11] The Commission then defines the domestic like product in light of the imported articles Commerce has identified.[12] The decision regarding the appropriate domestic like product(s) in an investigation is a factual determination, and the Commission has applied the statutory standard of "like" or "most similar in characteristics and

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collected in the final phase of the investigation include more recent information concerning January-September 2024 ("interim period") in addition to data for the 2021 to 2023 period covered by the preliminary investigation, we primarily rely on information collected during the final phase of the investigation. However, as relevant, we have also considered information collected during the preliminary phase of the investigation with respect to the 2021-2023 period given the *** in the foreign producer questionnaire response.

[7] 19 U.S.C. § 1677(4)(A).

[8] 19 U.S.C. § 1677(4)(A).

[9] 19 U.S.C. § 1677(10).

[10] 19 U.S.C. § 1677(10). The Commission must accept Commerce's determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value. *See*, *e.g.*, *USEC, Inc. v. United States*, 34 Fed. App'x 725, 730 (Fed. Cir. 2002) ("The ITC may not modify the class or kind of imported merchandise examined by Commerce."); *Algoma Steel Corp. v. United States,* 688 F. Supp. 639, 644 (Ct. Int'l Trade 1988), *aff'd*, 865 F.3d 240 (Fed. Cir.), *cert. denied*, 492 U.S. 919 (1989).

[11] *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); *see also Hitachi Metals, Ltd. v. United States*, Case No. 19-1289, slip op. at 8-9 (Fed. Circ. Feb. 7, 2020) (the statute requires the Commission to start with Commerce's subject merchandise in reaching its own like product determination).

[12] *Cleo*, 501 F.3d at 1298 n.1 ("Commerce's {scope} finding does not control the Commission's {like product} determination."); *Hosiden Corp. v. Advanced Display Mfrs.,* 85 F.3d 1561, 1568 (Fed. Cir. 1996) (the Commission may find a single like product corresponding to several different classes or kinds defined by Commerce); *Torrington Co. v. United States*, 747 F. Supp. 744, 748–52 (Ct. Int'l Trade 1990), *aff'd*, 938 F.2d 1278 (Fed. Cir. 1991) (affirming the Commission's determination defining six like products in investigations where Commerce found five classes or kinds).

uses" on a case-by-case basis.[13] No single factor is dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.[14] The Commission looks for clear dividing lines among possible like products and disregards minor variations.[15]

B. Product Description

Commerce defined the imported merchandise within the scope of the investigation as:

> {C}eramic flooring tile, wall tile, paving tile, hearth tile, porcelain tile, mosaic tile, flags, decorative tile, finishing tile, and the like (hereinafter ceramic tile). Ceramic tiles are articles containing a mixture of minerals including clay (generally hydrous silicates of alumina or magnesium) that are fired so the raw materials are fused to produce a tile that is less than 3.2 cm in thickness, exclusive of decorative features. All ceramic tile is subject to the scope regardless of end use, surface area, and weight, regardless of whether the tile is glazed or unglazed, regardless of the water absorption coefficient by weight, regardless of the extent of vitrification, and regardless of whether or not the tile is on a backing. Subject merchandise includes ceramic tile ''slabs'' or ''panels'' (tiles that are larger than 1 meter^2 (11 ft^2)).
>
> Subject merchandise includes ceramic tile that undergoes minor processing in a third country prior to importation into the United States. Similarly, subject merchandise includes ceramic tile produced that undergoes minor processing after importation into the United States. Such minor processing includes, but is not limited to, one or more of the following: beveling, cutting, trimming, staining, painting, polishing, finishing, additional firing, affixing a decorative surface to the tile, or any other processing that would otherwise not remove the

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[13] *See*, *e.g.*, *Cleo Inc. v. United States*, 501 F.3d 1291, 1299 (Fed. Cir. 2007); *NEC Corp. v. Department of Commerce*, 36 F. Supp. 2d 380, 383 (Ct. Int'l Trade 1998); *Nippon Steel Corp. v. United States*, 19 CIT 450, 455 (1995); *Torrington Co. v. United States*, 747 F. Supp. 744, 749 n.3 (Ct. Int'l Trade 1990), *aff'd*, 938 F.2d 1278 (Fed. Cir. 1991) ("every like product determination 'must be made on the particular record at issue' and the 'unique facts of each case'"). The Commission generally considers a number of factors, including the following: (1) physical characteristics and uses; (2) interchangeability; (3) channels of distribution; (4) customer and producer perceptions of the products; (5) common manufacturing facilities, production processes, and production employees; and, where appropriate, (6) price. *See Nippon*, 19 CIT at 455 n.4; *Timken Co. v. United States*, 913 F. Supp. 580, 584 (Ct. Int'l Trade 1996).

[14] *See*, *e.g.*, S. Rep. No. 96-249 at 90-91 (1979).

[15] *Nippon*, 19 CIT at 455; *Torrington*, 747 F. Supp. at 748-49; *see also* S. Rep. No. 96-249 at 90-91 (Congress has indicated that the like product standard should not be interpreted in "such a narrow fashion as to permit minor differences in physical characteristics or uses to lead to the conclusion that the product and article are not 'like' each other, nor should the definition of 'like product' be interpreted in such a fashion as to prevent consideration of an industry adversely affected by the imports under consideration.").

merchandise from the scope of the investigation if performed in the country of manufacture of the in-scope product.

Subject merchandise is currently classified in the Harmonized Tariff Schedule of the United States (HTSUS) under the following subheadings of heading 6907: 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051. Subject merchandise may also enter under subheadings of headings 6913, 6914, and 6905: 6913.90.2000, 6914.10.8000, 6914.90.8000, 6905.10.0000, and 6905.90.0050. The HTSUS subheadings are provided for convenience and customs purposes only. The written description of the scope of the investigation is dispositive.[16]

Commerce's scope definition is unchanged from the preliminary phase of the investigation.[17]

Ceramic tile is a masonry product containing hydrous silicates of alumina (and other metals) that is fired at high temperatures to bond together the constituent particles.[18] Ceramic tile is generally flat with beveled edges, and is available in various shapes, sizes, and colors.[19] Tiles can be formed as large as 5 feet by 15 feet or more (often referred to as "slabs" or "panels") and smaller than 1 inch by inch.[20] Thickness can exceed 3 cm (1.2 inches) or be as thin as 2 mm (0.8 inch).[21]

Ceramic tile is used to cover surfaces such as interior and exterior floors, walls, counter- and table-tops, shower stalls, and swimming pools, among numerous other applications.[22] The residential sector uses ceramic tile in kitchens, bathrooms, and entrances while the commercial sector uses it in floors and wall applications.[23]

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[16] *Ceramic Tile From India: Final Affirmative Countervailing Duty Determination and Final Affirmative Critical Circumstances Determination, in Part*, 90 Fed. Reg. 17,036, 17,038 (Apr. 23, 2025).

[17] *See Ceramic Tile from India*, Inv. Nos. 701-TA-720 and 731-TA-1688 (Preliminary), USITC Pub. 5515 (June 2024) ("*Preliminary Determinations"*) at 7-8.

[18] CR/PR at 1.11.

[19] CR/PR at 1.11.

[20] CR/PR at 1.11.

[21] CR/PR at 1.11.

[22] CR/PR at 1.12.

[23] CR/PR at 1.12. Ceramic tile may be distinguished between "floor tile" and "wall tile" based on physical performance characteristics for those particular end uses. CR/PR at 1.12-1.13. There are other distinctions among various types of ceramic tile. Porcelain ceramic tile has lower porosity (0.5 percent (Continued...)

C. Analysis

In the preliminary phase of the investigation, Petitioner argued that all ceramic tile within Commerce's scope definition should be treated as a single domestic like product.[24] Indian producers and respondents Comet Granito Pvt. Ltd., a Skera, Inc., and Varmora Granito Pvt. Ltd. argued that the Commission should find ceramic slabs to be a separate like product. The Commission applied its six traditional domestic like product factors and defined a single domestic like product consisting of all ceramic tile, coextensive with the scope of the investigations.[25]

In the final phase of the investigation, Petitioner argues that the Commission should define a single domestic like product, coextensive with Commerce's scope, as it did in its preliminary determinations,[26] and MSI does not take a position.[27] There is no new information or argument on the record that would warrant reconsideration of the definition of the domestic like product from the Commission's preliminary determinations. Accordingly, and in the absence of argument to the contrary, we define a single domestic like product consisting of all ceramic tile, coextensive with the scope of the investigation.

III. Domestic Industry

The domestic industry is defined as the domestic "producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product."[28] In defining the domestic industry, the Commission's general practice has been to include in the industry producers of all

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or less for water absorption) than other ceramic tile. CR/PR at 1.14. Mosaic tile consists of a combination of different ceramic tiles or other materials (*i.e.,* stone, glass, etc.). CR/PR at 1.14. Ceramic tile can also be glazed or unglazed and polished or unpolished. Glazing renders porcelain tile surfaces both more durable and easier to clean, but unglazed porcelain tile offers greater slip resistance. Polished ceramic tile is double-fired by first firing the raw tile and then firing it again after glazing. CR/PR at 1.15-1.16 n.53.

[24] *Preliminary Determinations*, USITC Pub. 5515 at 10.

[25] *Preliminary Determinations*, USITC Pub. 5515 at 10-14. The Commission found that all ceramic tiles within the scope, including slabs, are produced using the same basic raw materials, which impart similar physical characteristics; have the same range and overlap in end uses; and are generally produced through the same production processes at the same facilities using the same employees. *Id.* at 14. It additionally found that U.S. producers perceive slabs and other types of ceramic tile to be similar and include them in the same product brochures, suggesting that customers also regard the products similarly. *Id.* at 14. Finally, the Commission observed that although slabs may be priced relatively higher than smaller-size ceramic tiles, the wide range of ceramic tile products encompassed by the scope is consistent with a continuum of ceramic tile products, with no clear dividing line between slabs and other types of ceramic tile. The Commission therefore defined a single domestic like product consistent with Commerce's scope definition. *Id.* at 14.

[26] Petitioner's Prehearing Br. at 6-11.

[27] MSI's Prehearing Br. at 3.

[28] 19 U.S.C. § 1677(4)(A).

domestic production of the like product, whether toll-produced, captively consumed, or sold in the domestic merchant market.

This investigation raises the issue of whether two domestic producers should be excluded from the domestic industry definition pursuant to section 771(4)(B) of the Tariff Act. This provision allows the Commission, if appropriate circumstances exist, to exclude from the domestic industry producers that are related to an exporter or importer of subject merchandise or which are themselves importers.[29] Exclusion of such a producer is within the Commission's discretion based upon the facts presented in each investigation.[30]

Petitioner argues that the Commission should define the domestic industry as all U.S. producers of ceramic tile, as it did in its preliminary determinations. It contends that the two producers who qualify as related parties imported very small quantities of subject merchandise relative to their production of ceramic tile and did not benefit from their imports from subject sources.[31] MSI does not take a position on the definition of the domestic industry in the final phase of the investigation.[32]

We discuss below whether appropriate circumstances exist to exclude either related party from the domestic industry.

****.* *** domestic producer of ceramic tile in 2023, accounting for *** percent of U.S. production.[33] *** imported *** square feet of subject merchandise in 2021, *** square feet in 2022, *** square feet in 2023, *** square feet in January-September ("interim") 2023, and *** square feet in interim 2024.[34] *** subject imports did not exceed *** percent of its domestic production at any point in the POI.[35] *** reported that it ***.[36] ***'s position as the *** U.S. producer and a petitioner and the low ratio of *** imports to production indicate that *** primary interest lies in domestic production rather than importation. Nor is there any evidence

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[29] *See Torrington Co. v. United States*, 790 F. Supp. 1161, 1168 (Ct. Int'l Trade 1992), *aff'd without opinion*, 991 F.2d 809 (Fed. Cir. 1993); *Sandvik AB v. United States*, 721 F. Supp. 1322, 1331-32 (Ct. Int'l Trade 1989), *aff'd mem*., 904 F.2d 46 (Fed. Cir. 1990); *Empire Plow Co. v. United States*, 675 F. Supp. 1348, 1352 (Ct. Int'l Trade 1987).

[30] The primary factors the Commission has examined in deciding whether appropriate circumstances exist to exclude a related party include the following:

(1) the percentage of domestic production attributable to the importing producer;

(2) the reason the U.S. producer has decided to import the product subject to investigation (whether the firm benefits from the LTFV sales or subsidies or whether the firm must import in order to enable it to continue production and compete in the U.S. market);

(3) whether inclusion or exclusion of the related party will skew the data for the rest of the industry;

(4) the ratio of import shipments to U.S. production for the imported product; and

(5) whether the primary interest of the importing producer lies in domestic production or importation. *Changzhou Trina Solar Energy Co. v. USITC*, 100 F. Supp.3d 1314, 1326-31 (Ct. Int'l. Trade 2015); see *also Torrington Co. v. United States*, 790 F. Supp. at 1168.

[31] Petitioner's Prehearing Br. at 13-14.

[32] MSI's Prehearing Br. at

[33] CR/PR Table 3.1.

[34] CR/PR at Table 3.12.

[35] CR/PR at Table 3.12.

[36] CR/PR at Table 3.14.

that its domestic production operations benefitted through its imports of subject merchandise to such an extent that its inclusion in the domestic industry would mask injury or otherwise skew industry data. Consequently, we find that appropriate circumstances do not exist to exclude *** from the domestic industry.

. *** largest producer of ceramic tile and accounted for *** percent of domestic production in 2023.[37] *** imported *** square feet of subject merchandise in 2021, *** square feet in 2022, *** square feet in 2023, *** square feet in interim 2023 and *** square feet in interim 2024.[38] *** subject imports did not exceed *** percent of its domestic production at any point in the POI.[39] *** reported that it imported from India to "."[40] ***'s very low ratio of its imports to its production and its role as a petitioner indicate that its primary interest lies in domestic production rather than importation. Nor is there any evidence that its domestic production operations benefitted through its imports of subject merchandise to such an extent that its inclusion in the domestic industry would mask injury or otherwise skew industry data. Consequently, we find that appropriate circumstances do not exist to exclude *** from the domestic industry.

In sum, consistent with our definition of the domestic like product, we define a single domestic industry consisting of all U.S. producers of ceramic tile.

IV. Negligibility

Section 771(24) of the Tariff Act, which defines "negligibility," provides that imports from a subject country that are less than 3 percent of the volume of all such merchandise imported into the United States in the most recent 12-month period for which data are available that precedes the filing of the petition or self-initiation, as the case may be, shall be deemed negligible.[41]

From April 2023 through March 2024, the 12-month period preceding the filing of the petitions, subject imports from India accounted for 21.0 percent of total U.S. imports of ceramic tile.[42] As imports from India are above negligible levels, we find that imports from India subject to the countervailing duty investigation are not negligible.

V. Material Injury and Threat of Material Injury by Reason of Subject Imports

A. Legal Standards

In the final phase of antidumping and countervailing duty investigations, the Commission determines whether an industry in the United States is materially injured or threatened with material injury by reason of the imports under investigation.[43] In making this

[37] CR/PR at Table 3.1.
[38] CR/PR at Table 3.13.
[39] CR/PR at Table 3.13.
[40] CR/PR at Table 3.14.
[41] 19 U.S.C. § 1677(24)(A)(i).
[42] CR/PR at Table 4.9.
[43] 19 U.S.C. §§ 1671d(b), 1673d(b).

determination, the Commission must consider the volume of subject imports, their effect on prices for the domestic like product, and their impact on domestic producers of the domestic like product, but only in the context of U.S. production operations.[44] The statute defines "material injury" as "harm which is not inconsequential, immaterial, or unimportant."[45] In assessing whether the domestic industry is materially injured by reason of subject imports, we consider all relevant economic factors that bear on the state of the industry in the United States.[46] No single factor is dispositive, and all relevant factors are considered "within the context of the business cycle and conditions of competition that are distinctive to the affected industry."[47]

Although the statute requires the Commission to determine whether the domestic industry is "materially injured or threatened with material injury by reason of" unfairly traded imports,[48] it does not define the phrase "by reason of," indicating that this aspect of the injury analysis is left to the Commission's reasonable exercise of its discretion.[49] In identifying a causal link, if any, between subject imports and material injury to the domestic industry, the Commission examines the facts of record that relate to the significance of the volume and price effects of the subject imports and any impact of those imports on the condition of the domestic industry. This evaluation under the "by reason of" standard must ensure that subject imports are more than a minimal or tangential cause of injury and that there is a sufficient causal, not merely a temporal, nexus between subject imports and material injury.[50]

In many investigations, there are other economic factors at work, some or all of which may also be having adverse effects on the domestic industry. Such economic factors might include nonsubject imports; changes in technology, demand, or consumer tastes; competition among domestic producers; or management decisions by domestic producers. The legislative history explains that the Commission must examine factors other than subject imports to ensure that it is not attributing injury from other factors to the subject imports, thereby

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[44] 19 U.S.C. § 1677(7)(B). The Commission "may consider such other economic factors as are relevant to the determination" but shall "identify each {such} factor ... and explain in full its relevance to the determination." 19 U.S.C. § 1677(7)(B).

[45] 19 U.S.C. § 1677(7)(A).

[46] 19 U.S.C. § 1677(7)(C)(iii).

[47] 19 U.S.C. § 1677(7)(C)(iii).

[48] 19 U.S.C. §§ 1671d(b), 1673d(b).

[49] *Angus Chemical Co. v. United States*, 140 F.3d 1478, 1484-85 (Fed. Cir. 1998) ("{T}he statute does not 'compel the commissioners' to employ {a particular methodology}."), *aff'g,* 944 F. Supp. 943, 951 (Ct. Int'l Trade 1996).

[50] The Federal Circuit, in addressing the causation standard of the statute, observed that "{a}s long as its effects are not merely incidental, tangential, or trivial, the foreign product sold at less than fair value meets the causation requirement." *Nippon Steel Corp. v. USITC*, 345 F.3d 1379, 1384 (Fed. Cir. 2003). This was further ratified in *Mittal Steel Point Lisas Ltd. v. United States*, 542 F.3d 867, 873 (Fed. Cir. 2008), where the Federal Circuit, quoting *Gerald Metals, Inc. v. United States*, 132 F.3d 716, 722 (Fed. Cir. 1997), stated that "this court requires evidence in the record 'to show that the harm occurred "by reason of" the LTFV imports, not by reason of a minimal or tangential contribution to material harm caused by LTFV goods.'" *See also Nippon Steel Corp. v. United States*, 458 F.3d 1345, 1357 (Fed. Cir. 2006); *Taiwan Semiconductor Industry Ass'n v. USITC*, 266 F.3d 1339, 1345 (Fed. Cir. 2001).

inflating an otherwise tangential cause of injury into one that satisfies the statutory material injury threshold.[51] In performing its examination, however, the Commission need not isolate the injury caused by other factors from injury caused by unfairly traded imports.[52] Nor does the "by reason of" standard require that unfairly traded imports be the "principal" cause of injury or contemplate that injury from unfairly traded imports be weighed against other factors, such as nonsubject imports, which may be contributing to overall injury to an industry.[53] It is clear that the existence of injury caused by other factors does not compel a negative determination.[54]

Assessment of whether material injury to the domestic industry is "by reason of" subject imports "does not require the Commission to address the causation issue in any particular way" as long as "the injury to the domestic industry can reasonably be attributed to the subject imports."[55] The Commission ensures that it has "evidence in the record" to "show that the

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[51] SAA at 851-52 ("{T}he Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports."); S. Rep. 96-249 at 75 (1979) (the Commission "will consider information which indicates that harm is caused by factors other than less-than-fair-value imports."); H.R. Rep. 96-317 at 47 (1979) ("in examining the overall injury being experienced by a domestic industry, the ITC will take into account evidence presented to it which demonstrates that the harm attributed by the petitioner to the subsidized or dumped imports is attributable to such other factors;" those factors include "the volume and prices of nonsubsidized imports or imports sold at fair value, contraction in demand or changes in patterns of consumption, trade restrictive practices of and competition between the foreign and domestic producers, developments in technology and the export performance and productivity of the domestic industry"); *accord Mittal Steel*, 542 F.3d at 877.

[52] SAA at 851-52 ("{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports."); *Taiwan Semiconductor Industry Ass'n,* 266 F.3d at 1345 ("{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports ... . Rather, the Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports." (emphasis in original)); *Asociacion de Productores de Salmon y Trucha de Chile AG v. United States*, 180 F. Supp. 2d 1360, 1375 (Ct. Int'l Trade 2002) ("{t}he Commission is not required to isolate the effects of subject imports from other factors contributing to injury" or make "bright-line distinctions" between the effects of subject imports and other causes.); *see also Softwood Lumber from Canada*, Inv. Nos. 701-TA-414 and 731-TA-928 (Remand), USITC Pub. 3658 at 100-01 (Dec. 2003) (Commission recognized that "{i}f an alleged other factor is found not to have or threaten to have injurious effects to the domestic industry, *i.e*., it is not an 'other causal factor,' then there is nothing to further examine regarding attribution to injury"), *citing Gerald Metals,* 132 F.3d at 722 (the statute "does not suggest that an importer of LTFV goods can escape countervailing duties by finding some tangential or minor cause unrelated to the LTFV goods that contributed to the harmful effects on domestic market prices.").

[53] S. Rep. 96-249 at 74-75; H.R. Rep. 96-317 at 47.

[54] *See Nippon Steel Corp*., 345 F.3d at 1381 ("an affirmative material-injury determination under the statute requires no more than a substantial-factor showing. That is, the 'dumping' need not be the sole or principal cause of injury.").

[55] *Mittal Steel*, 542 F.3d at 876 &78; *see also id.* at 873 ("While the Commission may not enter an affirmative determination unless it finds that a domestic industry is materially injured 'by reason of' subject imports, the Commission is not required to follow a single methodology for making that (Continued...)

harm occurred 'by reason of' the LTFV imports," and that it is "not attributing injury from other sources to the subject imports." [56] The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed "rigid adherence to a specific formula."[57]

The question of whether the material injury threshold for subject imports is satisfied notwithstanding any injury from other factors is factual, subject to review under the substantial evidence standard.[58] Congress has delegated this factual finding to the Commission because of the agency's institutional expertise in resolving injury issues.[59]

The statute expressly sets forth the relevant volume, price, and impact factors to be considered in the Commission's analysis. Section 771(7)(C)(i) of the Tariff Act provides that the "Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States, is significant."[60]

Section 771(7)(C)(ii) of the Tariff Act provides that, in evaluating the price effects of the subject imports, the Commission shall consider whether

> (I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and
>
> (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree.[61]

Section 771(7)(C)(iii) of the Tariff Act provides that examining the impact of subject imports, the Commission "shall evaluate all relevant economic factors which have a bearing on

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determination ... {and has} broad discretion with respect to its choice of methodology.") *citing United States Steel Group v. United States*, 96 F.3d 1352, 1362 (Fed. Cir. 1996) and S. Rep. 96-249 at 75. In its decision in *Swiff-Train v. United States*, 793 F.3d 1355 (Fed. Cir. 2015), the Federal Circuit affirmed the Commission's causation analysis as comporting with the Court's guidance in *Mittal*.

[56] *Mittal Steel*, 542 F.3d at 873 (quoting from *Gerald Metals*, 132 F.3d at 722), 877-79. We note that one relevant "other factor" may involve the presence of significant volumes of price-competitive nonsubject imports in the U.S. market, particularly when a commodity product is at issue. In appropriate cases, the Commission collects information regarding nonsubject imports and producers in nonsubject countries in order to conduct its analysis.

[57] *Nucor Corp. v. United States*, 414 F.3d 1331, 1336, 1341 (Fed. Cir. 2005); *see also Mittal Steel*, 542 F.3d at 879 ("*Bratsk* did not read into the antidumping statute a Procrustean formula for determining whether a domestic injury was 'by reason' of subject imports.").

[58] We provide in our discussion below a full analysis of other factors alleged to have caused any material injury experienced by the domestic industry.

[59] *Mittal Steel*, 542 F.3d at 873; *Nippon Steel Corp*., 458 F.3d at 1350, *citing U.S. Steel Group*, 96 F.3d at 1357; S. Rep. 96-249 at 75 ("The determination of the ITC with respect to causation is ... complex and difficult, and is a matter for the judgment of the ITC.").

[60] 19 U.S.C. § 1677(7)(C)(i).

[61] 19 U.S.C. § 1677(7)(C)(ii).

the state of the industry."[62] These factors include output, sales, inventories, capacity utilization, market share, employment, wages, productivity, gross profits, net profits, operating profits, cash flow, return on investment, return on capital, ability to raise capital, ability to service debts, research and development, and factors affecting domestic prices. No single factor is dispositive and all relevant factors are considered "within the context of the business cycle and conditions of competition that are distinctive to the affected industry."[63]

Section 771(7)(F) of the Tariff Act directs the Commission to determine whether the U.S. industry is threatened with material injury by reason of the subject imports by analyzing whether "further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted."[64] The Commission may not make such a determination "on the basis of mere conjecture or supposition," and considers the threat factors "as a whole" in making its determination whether dumped or subsidized imports are imminent and whether material injury by reason of subject imports would occur unless an order is issued.[65] In making our determination, we consider all statutory threat factors that are relevant to the investigation.[66]

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[62] 19 U.S.C. § 1677(7)(C)(iii); *see also* SAA at 851 and 885 ("In material injury determinations, the Commission considers, in addition to imports, other factors that may be contributing to overall injury. While these factors, in some cases, may account for the injury to the domestic industry, they also may demonstrate that an industry is facing difficulties from a variety of sources and is vulnerable to dumped or subsidized imports.").

[63] 19 U.S.C. § 1677(7)(C)(iii). This provision was amended by the Trade Preferences Extension Act of 2015, Pub. L. 114-27.

[64] 19 U.S.C. § 1677(7)(F)(ii).

[65] 19 U.S.C. § 1677(7)(F)(ii).

[66] These factors are as follows:

(I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement) and whether imports of the subject merchandise are likely to increase,

(II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,

(III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,

(IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices and are likely to increase demand for further imports,

(V) inventories of the subject merchandise,

(VI) the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,

…

(Continued...)

B. Conditions of Competition and the Business Cycle

The following conditions of competition inform our analysis of whether there is material injury or threat of material injury by reason of subject imports.

1. Demand Considerations

U.S. demand for ceramic tile is driven primarily by demand in the construction sector, both for new homes and for remodeling/removing and replacement.[67] Most market participants reported that demand for ceramic tile is seasonal, with peaks in the spring and fall and valleys in the winter.[68]

The majority of U.S. producers (six of ten) reported that demand for ceramic tile has fluctuated downwards since January 1, 2021.[69] The responses by U.S. importers were mixed, with eight reporting that demand has steadily increased or fluctuated upwards, another eight reporting that demand has steadily decreased or fluctuated downwards, and the remaining two reporting no change.[70] Similar to U.S. producers, a majority of U.S. purchasers reported that demand had steadily decreased or fluctuated downwards.[71] Petitioner and MSI agree that macroeconomic trends such as higher interest rates during the POI resulted in slowed residential construction and modeling and, accordingly, reduced demand for ceramic tile.[72]

Apparent U.S. consumption of ceramic tile declined by 9.1 percent from 2021 to 2023, from 3.1 billion square feet in 2021 to 3.0 billion square feet in 2022 and 2.8 billion square feet

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(VIII) the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and

(IX) any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).

19 U.S.C. § 1677(7)(F)(i). To organize our analysis, we discuss the applicable statutory threat factors using the same volume/price/impact framework that applies to our material injury analysis. Statutory threat factors (I), (II), (III), (V), and (VI) are discussed in the analysis of subject import volume. Statutory threat factor (IV) is discussed in the analysis of subject import price effects. Statutory factors (VIII) and (IX) are discussed in the analysis of impact. Statutory factor (VII) concerning agricultural products is inapplicable to this investigation.

[67] CR/PR at 2.1 & 2.7.

[68] CR/PR at 2.1 & 2.7. Petitioner disputes whether there is "material seasonality in the market for ceramic tile." Petitioner's Posthearing Br., Exhibit A at 63-65; Hearing Tr. at 105 (Spooner). In their questionnaire responses, however, nine out of ten U.S. producers, ten of 18 U.S. importers, and eight of 11 U.S. purchasers indicated that the market was driven by the construction industry, which has seasonal business cycles. CR/PR at 2.7; *see also Ceramic Tile from China*, USITC Pub. 5053 at 16 (finding a seasonal business cycle); MSI Posthearing Br. at 15; MSI Prehearing Br. at 49-58.

[69] CR/PR at 2.8 & Table 2.5.

[70] CR/PR at 2.8 & Table 2.5.

[71] CR/PR at 2.8 & Table 2.5.

[72] Petitioner's Posthearing Br. at 12 & Exhibit A at 40; MSI's Prehearing Br. at 27-29 & Exhibits 1-2; Hearing Tr. at 139 (Anand).

in 2023; it was 2.0 billion square feet in interim 2024, which was 6.4 percent lower than the 2.1 billion square feet of consumption in interim 2023.[73]

Potential substitutes for ceramic tile include wood, vinyl, marble, and carpet for flooring, and paint, wallpaper, and paneling for walls.[74]

2. Supply Considerations

The domestic industry was the second largest source of supply in the U.S. market during the POI.[75] Between 2021 and 2023, the domestic industry's share of apparent U.S. consumption increased from 27.8 percent in 2021 to 28.4 percent in 2022 and 28.7 percent in 2023, for an overall increase of 0.9 percentage points during that period.[76] Its 27.7 percent market share in interim 2024 was 0.8 percentage points lower than its 28.6 percent share in interim 2023.[77]

The Commission received questionnaire responses from ten responding firms that accounted for the vast majority of U.S. production of ceramic tile in 2023.[78] Petitioner Dal-Tile accounted for the *** share of U.S. production at *** percent, followed by Florim at *** percent and Stonepeak at *** percent.[79]

Domestic producers reported several changes to their operations during the POI, including one acquisition, four openings or expansions, one closure, and several curtailments of production.[80]

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[73] CR/PR at 4.19 & Table 4.12.

[74] CR/PR at 2.1 & 2.9. The majority of U.S. producers (seven of ten) and importers (ten of 17) reported that there are no substitutes for ceramic tile, while the majority of purchasers (seven out of ten) reported that there are substitutes. *Id.* at 2.9.

[75] CR/PR at 4.19 & Tables 4.12 & C.1.

[76] CR/PR at 4.19 & Tables 4.12 & C.1.

[77] CR/PR at Tables 4.12 & C.1.

[78] CR/PR at 1.5 & Table 3.1.

[79] CR/PR at Table 3.1.

[80] CR/PR at Tables 3.3 & 3.4. AHF acquired Crossville Brands in October 2023. *Id.* Among the expansions, Florim invested $35 million in its plant in Clarksville, Tennessee, to add a new warehouse and invest in technologically advanced manufacturing machinery in September 2021, and Portobello opened a new $200 million production facility in Baxter, Tennessee, in October 2023. *Id.* During the Commission's hearing, however, representatives from those firms explained that the expansions had not resulted in increased production. Don Haynes from Florim explained that the Clarksville plant is "currently operating well below full capacity" and that Florim had been "forced to idle one {of its four kilns} due to declining sales and rising unsold inventory." Hearing Tr. at 20 (Haynes); *see also id.* at 20-21 (Haynes) (discussing Florim's decision to "forgo a planned expansion that would have included a new slab rectification and polishing line, along with associated building infrastructure"). James Durbin from Portobello explained that imports from India had reduced his company's profitability including "the delay in further planned investments to increase production capacity at the Tennessee plant" and that "part of the expansion planned for end-of-year 2024 has been put on pause, and being reconsidered." *Id.* at 37 (Durbin). Interceramic, which was the largest glazed tile manufacturer in the United States, announced a closure of its operations located in Carrolton Texas, by March 2023, resulting in a loss of (Continued...)

The domestic industry's practical capacity increased by 5.1 percent from 2021 to 2023, from 1.0 billion feet in 2021 and 2022 to 1.1 billion square feet in 2023, but it was 2.8 percent lower in interim 2024, at 771.9 million square feet, compared to 794.2 million square feet in interim 2023.[81] The domestic industry's practical capacity utilization rate declined by 6.4 percentage points from 2021 to 2023, falling from 88.8 percent in 2021 to 87.0 percent in 2022 and 82.4 percent in 2023; it reached 78.6 percent in interim 2024, 5.3 percentage points lower than the 84.0 percent figure in interim 2023.[82]

Although subject imports were the third largest source of supply to the U.S. market from 2021 to 2023, their share of apparent U.S. consumption increased by 7.4 percentage points, rising from 7.1 percent in 2021 to 9.3 percent in 2022 and 14.5 percent in 2023.[83] Their market share was higher still in interim 2024, at 15.7 percent, compared to 14.2 percent in interim 2023.[84]

Nonsubject imports were the largest source of supply to the U.S. market during the POI.[85] Their share of apparent U.S. consumption declined by 8.3 percentage points from 2021 to 2023, from 65.2 percent in 2021 to 62.3 percent in 2022 and 56.9 percent in 2023.[86] Nonsubject imports' market share was 56.6 percent in interim 2024, compared to 57.2 percent in interim 2023.[87] The largest sources of nonsubject imports during the POI were Brazil, Italy, Mexico, and Spain.[88] Nonsubject imports from China became subject to section 301 duties in September 2018 and antidumping and countervailing duty orders in June 2020 and subsequently declined to minimal levels during the POI.[89] Prior to the POI, nonsubject imports from China held a significant share of the market, which sharply declined beginning in 2020.[90]

Eight domestic producers are related to manufacturers of ceramic tile in nonsubject countries.[91] Dal-Tile, the largest U.S. producer, is owned by Mohawk Industries, Inc., which

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approximately 400 jobs. CR/PR at Table 3.3. Several firms reported curtailing production. For example, ***. *Id.* Dal-Tile reported decommissioning two of its production lines. Hearing Tr. at 61 (Caselli) (explaining that at a "big facility, they have the lowest cost but nevertheless we had to take about 35 percent capacity of{f} line because we can't be competitive with the India imports"); *Id.* at 58-59 (Caselli) (discussing Dal-Tile's inability to utilize its full capacity at its Dixon, Tennessee plant).

[81] CR/PR at 3.6 & Table 3.5. The increase in practical capacity during the POI was primarily due to ***. *Id.* at 3.7. As discussed above, Florim has not been able to realize the expected capacity gains from its expansion. Hearing Tr. at 20-21 (Haynes). Similarly, Portobello has curtailed production. *Id.* at 37 (Durbin).

[82] CR/PR at Table 3.5.

[83] CR/PR at 4.19 & Tables 4.12 & C.1.

[84] CR/PR at Tables 4.12 & C.1.

[85] CR/PR at 4.19 & Tables 4.12 & C.1.

[86] CR/PR at Tables 4.12 & C.1.

[87] CR/PR at Tables 4.12 & C.1.

[88] CR/PR at Tables 4.12 & C.1.

[89] CR/PR at 1.6, 1.10 & Table G.1.

[90] CR/PR at Table G.1.

[91] CR/PR at 3.3 & Table 3.2; Petitioner's Posthearing Br. Exhibit A at 54-59; MSI's Prehearing Br. at 12-16.

owns manufacturers in Brazil, Bulgaria, Italy, Mexico, Spain.[92] Portobello, another major producer, is owned by the Portobello Group, which own manufacturers in Brazil, and Florida Tile is owned by Panaria Group, which owns manufacturers in Italy and other countries.[93] Nine domestic producers and their affiliates imported ceramic tile from nonsubject countries such as Brazil, Italy, Mexico, and Spain during the POI.[94] Domestic producers and their affiliates accounted for *** percent of nonsubject imports in 2023.[95]

Most responding U.S. producers, importers, and purchasers reported that they did not experience supply constraints during the POI.[96] The sole domestic producer to report supply constraints, (***), which is a relatively small producer (accounting for *** percent of domestic production in 2023,[97] reported supply constraints in 2021 as a result of a COVID-19 related demand surge.[98] All three importers that reported supply constraints reported that they occurred in 2021.[99]

3. Substitutability and Other Conditions

We find that the record indicates that there is a moderate-to-high degree of substitutability between domestically produced ceramic tile and subject imports.[100] Most responding U.S. producers (nine of ten) reported that the domestic like product and subject imports were always or frequently interchangeable.[101] While importers' responses were more mixed, a majority reported that the domestic like product and subject imports were always or frequently interchangeable.[102] The majority of purchasers (four of six) reported that the domestic like product and subject imports were frequently interchangeable.[103]

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[92] Hearing Tr. at 30 (Caselli); *id.* at 121-123 (Stoel); *id.* at 154-155 (Anand); *id.* at 193-194 (Hinter); Petitioner's Posthearing Br., Exhibits J & K; MSI's Prehearing Br. at 12-16 & Exhibits 1 & 2.

[93] Petitioner's Posthearing Br., Exhibits L & O; MSI's Prehearing Br. at 16-17 & Exhibit 1; Hearing Tr. at 35 (Durbin); *id.* at 96-97 (Durbin); *id.* at 121-122 (Stoel); CR/PR at Table 3.2.

[94] CR/PR at 3.3 & Tables 3.2 & 4.4; *see also* MSI's Prehearing Br. at 14-16 & Exhibits 1 & 2.

[95] CR/PR at Table 4.4

[96] CR/PR at 2.6.

[97] CR/PR at Table 3.1.

[98] CR/PR at 2.6.

[99] CR/PR at 2.6. Importers *** reported that these supply constraints were due to logistical constraints, while importer *** reported that labor shortages led to supply chain disruptions. *Id.* Importers *** reported that the supply constraints persisted through the remainder of the POI, while importer *** reported that its supply constraints ended in 2021. *Id.*

[100] CR/PR at 2.9.

[101] CR/PR at Table 2.12. Specifically, five U.S. producers reported that the domestic like product and subject imports were always interchangeable, four reported that they were frequently interchangeable, and one reported that they were only sometimes interchangeable. *Id*.

[102] CR/PR at 2.17 & Table 2.13. Five importers reported that the domestic like product and subject imports were always interchangeable, five reported that they were frequently interchangeable, five reported that they were only sometimes interchangeable, and one reported that they were never interchangeable. *Id*.

[103] CR/PR at 2.17 & Table 2.14.

When asked for a country-by-country comparison with respect to 20 factors that influence purchasing decisions, the majority of purchasers reported that ceramic tile from India and the United States was comparable with respect to eight factors (availability of matte tile, availability of rectified tile, discounts offered, innovative trend-forward designs, minimum quantity requirements, packaging, product consistency, and product range).[104] However, purchasers were evenly split as to whether the domestic like product was superior or comparable to subject imports with respect to three factors (quality meets industry standards, quality exceeds industry standards, and reliability of supply).[105] In addition, purchasers had mixed responses with respect to delivery terms and payment terms.[106] For the remaining factors, at least half of responding purchasers rated the domestic like product as superior to subject imports with respect to five factors (availability, delivery time, known or trusted brands, technical support/service, and U.S. transportation cost), and rated the domestic like product as inferior to subject imports with respect to two factors (availability of polished tile and price).[107]

In addition, the majority (nine of 10) of purchasers familiar with the domestic product reported that domestically produced ceramic tile always or usually met minimum quality standards, and, of those purchasers who reported having knowledge of ceramic tile from India, the majority (five of six) reported that ceramic tile from India usually met minimum quality specifications.[108] However, when asked to assess how often differences other than price were significant in sales of ceramic tile from different sources, most responding purchasers reported that such differences are always or frequently significant in purchasing decisions.[109] In contrast, the vast majority of responding domestic producers (nine of ten) and the majority of responding U.S. importers (ten of 16) reported that differences other than price were sometimes or never significant.[110]

The record indicates that there are variations in ceramic tile, predominantly concerning physical characteristics – such as polished or unpolished, rectified or unrectified, glazed or unglazed, porcelain or non-porcelain, and floor or wall tile – and that different producers may possess different capabilities to produce different types of tiles or be more concentrated in certain types of tile relative to others.[111] The record also indicates, however, that both U.S.

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[104] CR/PR at 2.14 & Table 2.11.

[105] CR/PR at 2.14 & Table 2.11. Four purchasers rated U.S. product superior to subject imports, and four purchasers rated U.S. product comparable to subject imports, with respect to quality meets industry standards, quality exceeds industry standards, and reliability of supply. *Id.*

[106] CR/PR at 2.14 & Table 2.11.

[107] CR/PR at 2.14 & Table 2.11.

[108] CR/PR at 2.13 & Table 2.9; *see also* Hearing Tr. at 83-84 (Astrachan) (explaining that domestically produced tile and subject imports meet the same quality standards).

[109] CR/PR at Table 2.17. Specifically, three purchasers reported that such differences are always significant, one reported that they are frequently significant, and two reported that they are only sometimes significant. *Id.* Purchasers offered several non-price considerations to explain their purchases of subject imports. ***". CR/PR at Table 5.15.

[110] CR/PR at 2.18 & Tables 2.15 & 2.16.

[111] CR/PR at Table 3.10, Table 4.7.

producers and U.S. importers supply ceramic tile with these range of characteristics in appreciable quantities.[112]

In sum, the record as reviewed above shows that domestic product and subject imports are generally interchangeable and comparable across purchasing factors, although responding importers and purchasers generally reported somewhat lower levels of interchangeability than did U.S. producers and significant differences other than price,[113] and responses regarding purchasing factors showed some degree of variability as to whether domestic product was superior, comparable, or inferior with respect to some factors.[114] Accordingly, we find on balance that the record indicates that there is a moderate-to-high degree of substitutability between domestically produced ceramic tile and subject imports.

We also find that price is an important factor in purchasing decisions for ceramic tile, among other important factors, such as quality and availability. In their questionnaires, purchasers were asked to identify the main purchasing factors that their firms considered in their purchasing decisions for ceramic tile. Purchasers most frequently reported price/cost as a top-three most important purchasing factor (cited by eight firms), followed by quality (seven firms) and availability (five firms).[115] Of those factors, quality was the most frequently cited top factor (cited by three firms), followed by price (one firm).[116] Purchasers most frequently reported availability, reliability of supply, product consistency, quality meeting industry standards, and price to be very important purchasing factors.[117]

Turning to other conditions of competition, U.S. producers reported that *** percent of their U.S. shipments were made pursuant to spot sales with most of the remainder through long-term and annual contracts, which accounted for *** and *** percent, respectively, of their U.S. shipments.[118] Importers reported that most of their U.S. shipments, *** percent, were made pursuant to spot sales, with most of the remainder, *** percent, through long-term contracts.[119] Both domestic producers and subject importers reported selling nearly all of their ceramic tile from inventories, with comparable lead times.[120]

The primary raw material used to produce ceramic tile is clay, followed by glazing, decorating and other surfacing materials, then by silica, feldspar, and other minerals.[121] Raw

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[112] CR/PR at Table 3.10, Table 4.7. For example, respondents note that while polished, rectified tile comprised only *** percent of U.S. producers' product mix in 2023, polished, rectified tile made up *** percent of U.S. importers' U.S. shipments of subject imports that year. *Id.* However, U.S. producers shipped *** square feet of polished, rectified tile in 2023, compared to *** square feet of polished, rectified of subject imports shipped by U.S. importers. *Id.*

[113] CR/PR at 2.17 & Tables 2.12-2.14.

[114] CR/PR at 2.14 & Table 2.11.

[115] CR/PR at 2.10 & Table 2.7.

[116] CR/PR at 2.10 & Table 2.7. Quality and availability/supply were the most frequently reported second-most important factors (three firms each), and price was the most frequently cited third-most important factor (six firms). *Id.*

[117] CR/PR at Table 2.8.

[118] CR/PR at 5.4 & Table 5.4.

[119] CR/PR at 5.4 & Table 5.4.

[120] CR/PR at 2.12.

[121] CR/PR at 6.18-6.19 & Table 6.4.

material costs were the second largest component of U.S. producers' total cost of goods sold ("COGS") from 2021 to 2023, increasing as a share of the domestic industry's total COGS from 30.8 percent in 2021 to 33.0 percent in 2022 and 2023.[122] Raw materials as a share of U.S. producers' total COGS was lower, at 32.8 percent, in interim 2024, compared to 33.4 percent in interim 2023.[123]

As noted earlier, effective May 10, 2019, ceramic tile originating in China became subject to an additional 25 percent *ad valorem* duty under section 301 of the Trade Act of 1974.[124] Moreover, imports of ceramic tile from China have been subject to antidumping and countervailing duty orders since June 2020.[125] Effective February 4, 2025, ceramic tile originating in China became subject to an additional 10 percent *ad valorem* duty under the International Emergency Economic Powers Act ("IEEPA"),[126] and on March 4, 2025, that additional duty increased to 20 percent *ad valorem*.[127]

Effective April 5, 2025, ceramic tile originating in India and all other countries, including China, became subject to an additional ten percent *ad valorem* duty under IEEPA. Effective April 9, 2025, that duty rate for ceramic tile originating in China rose to 84 percent *ad valorem* and rose again to 125 percent effective April 10, 2025.[128] Effective April 9, 2024, India was instead assigned an individualized country duty of 26 percent *ad valorem*.[129] However, effective April 10, 2025, individualized country duties were suspended, and the duty rate for ceramic tile originating in India was returned to ten percent.[130] [131]

C. Threat of Material Injury by Reason of Ceramic Tile from India

Based on the record in this investigation, we find that an industry in the United States is threatened with material injury by reason of imports of ceramic tile from India that have been subsidized by the government of India.[132]

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[122] CR/PR at Table 6.1.

[123] CR/PR at Table 6.1.

[124] 19 U.S.C. § 2411, *et seq.*; CR/PR at 1.10

[125] CR/PR at 1.5.

[126] 50 U.S.C. § 1701, *et seq.*

[127] Exec. Order No. 14195, 90 Fed. Reg. 9121 (Feb. 7, 2025); Exec. Order No. 14228 (Mar. 3, 2025); *Further Amended Notice of Implementation of Additional Duties on Products of the People's Republic of China Pursuant to the President's Executive Order 14195, Imposing Duties to Address the Synthetic Opioid Supply Chain in the People's Republic of China*, 90 Fed. Reg. 11426 (Mar. 6, 2025); CR/PR at 1.10-1.11.

[128] CR.PR at 1.10.

[129] CR/PR at 1.11.

[130] CR/PR at 1.11; Exec. Order No. 14257, 90 Fed. Reg. 15041 (Apr. 2, 2025); Exec. Order No. 14266, 90 Fed. Reg. 15625 (Apr. 9, 2025).

[131] This information reflects tariffs in effect as of May 12, 2025, the day when the record closed with respect to the submission of factual information.

[132] In its final countervailing duty determination concerning ceramic tile from India, Commerce relied in part on facts otherwise available and adverse inferences and found eight separate programs to be countervailable. *Issues and Decisions Memorandum for the Final Affirmative Determination of the*

(Continued...)

1. Likely Volume of Subject Imports

Subject imports maintained a significant and increasing presence in the U.S. market throughout the POI. The volume of subject imports increased by 85.9 percent from 2021 to 2023, from 217.8 million square feet in 2021 to 283.9 million square feet in 2022 and 404.8 million square feet in 2023.[133] The volume of subject imports in interim 2024, 312.9 million square feet, was 3.2 percent higher than the volume of subject imports in interim 2023, 303.1 million square feet.[134] Subject imports' share of apparent U.S. consumption increased by 7.4 percentage points from 2021 to 2023, from 7.1 percent in 2021 to 9.3 percent in 2022 and 14.5 percent in 2023.[135] Their 15.7 percent share in interim 2024 was 1.5 percentage points higher than their 14.2 percent share in interim 2023.[136]

In light of the foregoing, we find that the volume and increase in volume of subject imports in absolute terms and relative to consumption in the United States during the POI were significant.[137]

We find that this significant and increasing volume of subject imports is likely to continue to increase substantially in the imminent future. The presence of subject imports in the U.S. market more than doubled over the POI, growing from 7.1 percent market share in 2021 to 14.5 percent in 2023, demonstrating the Indian industry's ability to rapidly increase its presence in the U.S. market.[138] In addition, as detailed below, the Indian ceramic tile industry has expanded, and continues to expand its capacity, notwithstanding substantial unused

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Countervailing Duty Investigation of Ceramic Tile from India, C-533-929 (Apr. 16, 2025) at 6-7, 9-11. We have considered the information presented by Commerce as to the nature of these subsidies, and none of them is identified as a subsidy described in Article 3 or 6.1 of the Subsidies Agreement. MSI argues that the final subsidy rate of approximately 3.0 percent is "miniscule" and will not encourage additional subject imports. MSI's Posthearing Br. at 13. While we do not rely on Commerce's findings for our conclusion that subject imports will likely continue to increase, we observe that subject imports increased rapidly over the POI while the subsidies were in effect.

[133] CR/PR at Tables 4.2-4.3 & C.1.

[134] CR/PR at Tables 4.2 & C.1.

[135] CR/PR at Tables 4.12 & C.1.

[136] CR/PR at Tables 4.12 & C.1. Subject imports as a share of U.S. production increased by 22.2 percentage points from 2021 to 2023, from 24.4 percent in 2021 to 31.7 percent in 2022 and 46.6 percent in 2023. The ratio was 51.6 percent in interim 2024, compared to 45.3 percent in interim 2023. CR/PR at Table 4.2.

[137] Subject imports as a share of U.S. production increased by 22.2 percentage points from 2021 to 2023, from 24.4 percent of U.S. production in 2021 to 31.7 percent in 2022 and 46.6 percent in 2023. The ratio was 51.6 percent in interim 2024, compared to 45.3 percent in interim 2023. CR/PR at Table 4.2.

[138] Indeed, imports of ceramic tile from India rapidly entered the U.S. market from 2019 to 2020 as imports of ceramic tile from China exited the market following imposition of antidumping and countervailing duty orders on imports from China. Imports of ceramic tile from India increased by 132.3 million square feet (195.1 percent) from 2019 to 2020 as large volumes of imports from China withdrew from the market, and by another 17.6 million square feet from 2020 to 2021. CR/PR at Table G.1. Subject imports from India then increased from these already sizeable volumes by 187.0 million square feet (85.9 percent) from 2021 to 2023. *Id*. at Tables 4.2-4.3, G.1.

capacity. The industry also is a large exporter and has significant incentives to export to the U.S. market.

As an initial matter, we note that reporting Indian producers' and exporters' exports accounted for only 45.0 percent of subject import volume in 2023.[139] Accordingly, the data on the industry in India, which includes its capacity, production, shipment, and export data, are understated in the final phase of the investigation.[140] However, the record regarding the industry in India, including the record from the preliminary phase of this investigation, supports finding a likely substantial increase in subject import volume.

The Indian industry's capacity and production of ceramic tile increased substantially over the POI and are projected to continuing growing in the imminent future. The 20 responding Indian producers and exporters of ceramic tile in the final phase of this investigation reported four expansions, two plant openings, and four production curtailments during the POI.[141] The Indian industry reported that its practical capacity increased 19.4 percent from 2021 to 2023, from 736.7 million square feet in 2021 to 841.8 million square feet in 2022 and 879.8 million square feet in 2023; its reported capacity was 687.7 million square feet in interim 2024, 4.7 percent higher than its 656.7 million square feet of practical capacity in interim 2023.[142] This growth in practical capacity, and projected further increases, indicate an ability to further increase exports to the United States in the imminent future.[143]

Reported Indian production of ceramic tile increased from 594.7 million square feet in 2021 to 675.9 million square feet in 2022 and 760.7 million square feet in 2023, an overall increase of 27.9 percent; it was 7.2 percent higher in interim 2024, at *** square feet, than in interim 2023, at 555.2 million square feet.[144]

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[139] Calculated from CR/PR at Tables 4.2 and 7.10.

[140] *See* Preliminary Phase Staff Report, INV-WW-052 (May 24, 2024), EDIS Doc. No. 822258 at VII-3; *see also* CR/PR at 7.3. As discussed above, 138 producers and exporters of ceramic tile in India responded to the Commission's foreign producer questionnaire in the preliminary phase of the investigation.

[141] CR/PR at Tables 7.4 & 7.5. The responding Indian producers of ceramic tile in the preliminary phase of this investigation reported 23 expansions and 17 plant openings over the 2021-2023 period. Preliminary Phase Staff Report at Tables VII-4 & VII-5.

[142] CR/PR at Table 7.10. The 138 responding producers and exporters in the preliminary phase of the investigation reported that their production capacity increased *** percent during the POI, from *** square feet in 2021 to *** square feet in 2023. Thus, their reported capacity was several times that of the 20 Indian producers reporting in the final phase. *See* Preliminary Phase Staff Report at Table VII-8.

[143] CR/PR at Table 7.10. The reporting Indian industry projects that its practical capacity will further increase from *** square feet 2024 to *** square feet in 2025. *Id.* The responding Indian producers in the preliminary phase projected that their practical capacity would continue to increase from *** square feet in 2024 to *** square feet in 2025. Preliminary Phase Staff Report at Table VII-8.

[144] CR/PR at Table 7.10. The Indian industry forecasts that its production of ceramic tile will increase from *** square feet in 2024 to *** square feet in 2025. *Id.* The responding Indian producers in the preliminary phase reported production of *** square feet in 2021, *** square feet in 2022, and *** square feet of ceramic tile in 2023, for an overall increase of *** percent; they projected production of *** square feet in 2024 and *** square feet in 2025, for an increase of *** percent from 2023. Preliminary Phase Staff Report at Table VII-8.

Although the Indian industry reported increasing capacity utilization during the POI, as increasing production outpaced increases in capacity, the industry nonetheless possessed substantial unused practical capacity throughout the POI.[145] The industry reported unused practical production capacity of *** square feet in 2023, equivalent to 4.3 percent of apparent U.S. consumption and 29.4 percent of subject imports that year.[146] Thus, even before accounting for projected growth, the Indian industry maintains substantial excess capacity with which to further increase its exports to the United States. In addition, substantial increases in both foreign producers' and U.S. importers' inventories of subject merchandise indicate that increases in subject imports and shipments of subject imports are likely to occur in the imminent future.[147]

The record also shows that India was the world's fourth largest exporter of ceramic tile during the POI,[148] and that its exports were increasingly focused on the United States during

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[145] The Indian industry's practical capacity utilization rate increased overall, declining from 80.7 percent in 2021 to 80.3 percent in 2022 before increasing to 86.5 percent in 2023; its utilization rate was 86.5 percent in interim 2024, compared to 84.5 percent in interim 2023. CR/PR at Table 7.10. The Indian industry projects capacity utilization rates of 89.5 percent in 2024 and 90.9 percent in 2025.

The practical capacity utilization rate for responding Indian producers in the preliminary phase increased from 73.9 percent in 2021 to 77.2 percent in 2023. Preliminary Phase Staff Report at Table VII-8. They projected capacity utilization rates of 80.0 percent in 2024 and 80.5 percent in 2025. *Id*.

[146] *Derived from* CR/PR at Table 7.10 and C.1. The Indian industry forecasts that its unused capacity will decline to 95.9 million square feet in 2024 and 86.8 million square feet in 2025. CR/PR at Table 7.10. The data reported in the preliminary phase of the investigation indicated that Indian producers had 1.3 billion square feet of unused capacity in 2023, an amount far greater than that reported in the final phase and equivalent to 45.6 percent of apparent U.S. consumption. The industry also forecast that it would have excess capacity of 1.2 billion square feet in 2024 and 2025. *See* Preliminary Phase Staff Report at Table VII-8.

Responding firms in India do not produce other products on the same equipment and machinery used to produce ceramic tile, so there is no possibility of shifting production of out-of-scope products to subject merchandise. CR/PR at 7.15.

[147] The Indian industry's end-of-period inventories of subject merchandise increased from *** square feet in 2021 to *** square feet in 2022 and *** square feet in 2023. They were *** square feet in interim 2024, compared to *** square feet in interim 2023. CR/PR at Table 7.10. Data from the preliminary phase of the investigation indicate higher inventory levels but a slower rate of growth. *See* Preliminary Phase Staff Report at Table VII-8.

U.S. importers' end-of-period inventories of subject merchandise increased from *** square feet in 2021 to *** square feet in 2022 and *** square feet in 2023. They were *** square feet in interim 2024, compared to *** square feet in interim 2023. CR/PR at Table 7.12. In addition, U.S. importers reported arranged subject imports of *** square feet for the period of October 2024 through September 2025. CR/PR at Table 7.13.

[148] *See* CR/PR at Table 7.14. The Indian industry reportedly exported to 139 different countries in 2023 and increased its exports to 121 of these countries in 2023, even as subject imports from India increased by 42.6 percent from 2022-2023. MSI's Prehearing Br, Exhibit 3, "Indian Ceramic Tile Exports," Apr. 16, 2024, in *Ceramic World Web.* The world's largest exporter of ceramic tile is China, which currently faces antidumping and countervailing duty orders in the United States. *See* CR/PR at Table 7.14

this time.[149] Overall, the responding Indian industry's exports to the world increased by *** percent from 2021 to 2023 and were *** percent higher in interim 2024 than in interim 2023.[150] Notably, the industry's exports to the United States increased by a considerably greater *** percent from 2021 to 2023, and were *** percent higher in interim 2024 than in interim 2023.[151] Reflecting an increasing export focus on the United States, the industry's exports to markets other than the United States declined *** percent from 2021 to 2023, and were *** percent higher in interim 2024 than in interim 2023.[152] The United States is the

[149] *See* CR/PR at Table 7.10. The industry's exports to the United States as a share of its total shipments increased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. The ratio was higher, at *** percent, in interim 2024, compared to *** percent in interim 2023. *Id.* The industry forecasts that the ratio will be *** percent in 2024 and *** percent in 2025. *Id.* Likewise, for the responding Indian producers and exporters in the preliminary phase, exports to the United States increased as a share of total shipments from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. Preliminary Phase Staff Report at Table VII-8.

[150] The industry's total exports increased from *** square feet in 2021 to *** square feet in 2022 and *** square feet in 2023; total exports were *** square feet in interim 2024, compared to *** square feet in interim 2023. CR/PR at Table 7.10. The Indian industry projects total exports of *** square feet in 2024 and *** square feet in 2025. *Id.*

The industry's exports as a share of its total shipments decreased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. The ratio was higher, at *** percent, in interim 2024, compared to *** percent in interim 2023. *Id.* The industry forecasts that the ratio will be *** percent in 2024 and *** percent in 2025. *Id.*

Data from the preliminary phase of the investigation suggest a faster rate of growth of exports than data from the final phase of the investigation, but the data also show exports accounting for a smaller portion of the industry's total shipments. *See* Preliminary Phase Staff Report at Table VII-8. These producers' reported exports increased from *** square feet in 2021 to *** square feet in 2023. *Id*. Exports accounted for between *** percent and *** percent of responding Indian producers' total shipments in the preliminary phase. *Id*. Exports were projected to account for *** percent and *** percent of total shipments in 2024 and 2025, respectively. *Id*.

[151] Responding Indian producers' and exporters' (resellers of exports) total exports to the United States increased from *** square feet in 2021 to *** square feet in 2022 and *** square feet in 2023; total exports to the United States were higher, at *** square feet, in interim 2024, compared to *** square feet in interim 2023. CR/PR at Table 7.10. The Indian industry projects total exports to the United States of *** square feet in 2024 and *** square feet in 2025. *Id.* Similarly, exports reported by Indian producers and exporters to the United States in the preliminary phase grew by *** percent from 2021 to 2023, from *** square feet in 2021 to *** square feet. Preliminary Phase Staff Report at Table VII-8. They projected exports to the United States of *** square feet in 2024 and *** square feet in 2025. *Id*.

[152] The industry's exports to markets other than the United States increased from *** square feet in 2021 to *** square feet in 2022 before declining to *** square feet in 2023; the industry's exports to other markets were *** square feet in interim 2024, compared to *** square feet in interim 2023. CR/PR at Table 7.10. The Indian industry projects exports to other markets of *** square feet in 2024 and *** square feet in 2025. *Id.* The industry's exports to other markets as a share of its total shipments decreased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. The (Continued...)

Indian industry's largest export market.[153] These trends and other record information indicate that the United States is a relatively attractive export market for subject producers and exporters in India. Specifically, the average unit values of exports of subject merchandise from India to the United States are higher than those of shipments to the industry's other large export markets.[154] The Indian industry also faces antidumping duties in the European Union, Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the United Emirates, and Taiwan.[155] Accordingly, the record reflects that the industry in India is a large and growing exporter with an increasing, demonstrated focus on the U.S. market and incentives to further direct exports to the U.S. market in the imminent future.

Respondent MSI points out that the Indian industry's home market shipments increased in volume and as a share of total shipments during the POI.[156] It argues that this trend will continue and that increasing demand in India for ceramic tile will absorb the Indian industry's increased production of ceramic tile.[157] However, even with increasing shipments to the home

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ratio was lower, at *** percent, in interim 2024, compared to *** percent in interim 2023. *Id.* The industry forecasts that the ratio will be *** percent in 2024 and *** percent in 2025. *Id.*

Data from the preliminary phase show that while the responding Indian producers' exports to non-U.S. markets grew by 21.9 percent from 2021 to 2023 (from 544.6 million to 663.9 million square feet), this was outpaced by their increase in exports to the United States, which increased by 56.2 percent from 2021 to 2023 (from 83.0 million to 129.7 million square feet). Preliminary Phase Staff Report at Table VII-8. While exports to other markets declined as a share of these producers' total shipments from *** percent in 2021 to *** percent in 2023, their exports to the United States increased as a share of total shipments from *** percent in 2021 to *** percent in 2023. *Id*.

[153] CR/PR at Table 7.11 (Global Trade Atlas data). Global Trade Atlas data indicate that in 2023 the industry increased exports to several countries and more than doubled its exports to Israel, Mexico, Russia, and South Africa, demonstrating the ability to rapidly increase exports to multiple markets. *Id.* Product coverage for the Global Trade Atlas data conform very closely to the scope of the investigation. *See* CR/PR at 1.8-1.9 & Table 7.11.

[154] *See* CR/PR at Table 7.11 (Global Trade Atlas data). *See also* MSI Prehearing Br, Exhibit 3, "Indian Ceramic Tile Exports," Apr. 16, 2024, in *Ceramic World Web* (showing export prices for the United States are higher than nine other top export markets).

[155] *See* CR/PR at 7.20.

[156] CR/PR at Table 7.10. The industry's home market shipments increased from 424.7 million square feet in 2021 to 513.6 million square feet in 2022 and 578.5 million square feet in 2023; they were higher, at 442.5 million square feet, in interim 2024, compared to 423.6 million square feet in interim 2023. *Id.* The Indian industry forecasts that its home market shipments will be *** square feet in 2024 and 673.7 million square feet in 2025. *Id.* The industry's home market shipments as a share of its total shipments increased from 74.3 percent in 2021 to 76.2 percent in 2022 and 77.1 percent in 2023. The ratio was lower, at 76.6 percent, in interim 2024, compared to 77.3 percent in interim 2023. *Id.* The industry forecasts that the ratio will be 78.1 percent in 2024 and 77.4 percent in 2025. *Id.* Data from the preliminary phase of the investigation indicate a slower rate of growth in home market shipments, but also show home market shipments maintaining a relatively stable (but higher) share of the Indian industry's total shipments. These preliminary phase data indicate that home market shipments accounted for *** percent of the industry's shipments in 2021 and *** percent in 2023, with projections for *** percent in 2024 and *** percent in 2025. Preliminary Phase Staff Report at Table VII-8.

[157] MSI's Prehearing Br. at 45-47; MSI's Posthearing Br. at 14.

market during the POI, the Indian industry still greatly increased exports to the world and to the United States, resulting in subject imports increasing significantly in volume and market share.[158] Between interim periods, home market shipments rose by 4.5 percent, but exports to the United States rose by a greater 13.3 percent.[159] The United States was the largest export destination for Indian exports in every year of the POI and had the highest AUVs of all of India's export markets in 2022 and 2023.[160] As discussed above, the Indian industry's capacity increased during the POI and is projected to continue to increase as it has opened new plants and expanded capacity, providing the industry with additional capacity with which to increase shipments.[161] Given the rapid increase in India's exports of ceramic tile to the United States and other markets during the POI (with the United States accounting for an increasing share of its total exports and shipments over the POI and between interim periods),[162] the increases and projected increases in Indian capacity, the Indian industry's unused capacity during the POI and projected substantial unused capacity, and the attractiveness of the U.S. market compared to other export markets, we find that increases in the industry's home market shipments or any alleged focus on other export markets are not likely to prevent substantially increased exports of ceramic tile to the United States in the imminent future.[163]

MSI argues that the IEEPA duties of 10 percent are scheduled to increase to 26 percent on July 9, 2025, and are likely to disincentivize the Indian industry from targeting the U.S. market.[164] It is unclear, however, how long the duties will remain in place and at what level.[165] At their current level of 10 percent, we find that they are unlikely to substantially restrain future increases in subject imports. While MSI argues that these duties will encourage Indian producers/exporters to serve other "attractive" markets in the Middle East and Europe, we note that imports of ceramic tile from India are subject to antidumping duties in the EU and a number of Middle Eastern countries, including in three of India's eight largest export

[158] *See* MSI's Prehearing Br. at Exhibit 3.

[159] CR/PR at Table 7.10.

[160] CR/PR at Table 7.11.

[161] CR/PR at Tables 7.4, 7.5 & 7.10; Preliminary Phase Staff Report at Tables VII-3, VII-5 & VII-8.

[162] *See* CR/PR at Table 7.10.

[163] MSI also contends that the Indian industry will focus its exports on markets in Europe and Asia rather than the United States. MSI's Prehearing Br. at 45-46, 48; MSI's Posthearing Br. at 14. We find this claim unpersuasive. The United States accounted for an increasing share of its total exports (and shipments) over the POI and between interim periods. *See* CR/PR at Table 7.10. Given the attractiveness of the U.S. market, as discussed above, it is likely that this trend will continue in the imminent future. *See* CR/PR at Table 7.10. Moreover, the growing and unused capacity of the Indian industry indicates that it can substantially increase exports to the United States while continuing to export to other markets in the imminent future, as it did during the POI.

[164] MSI's Posthearing Br. at 13; MSI's Prehearing Br. at 48-49. *See* CR/PR at 1.10-1.11.

[165] There are ongoing negotiations between the United States and the government of India concerning these duties and India's trade barriers to U.S. exports. *See* United States Trade Representative Fact Sheet: U.S.-India Establish Terms of Reference on Bilateral Trade Agreement (April 2025) EDIS Doc. No. 850061; *Exclusive: India prepared to 'future-proof' trade deal as sweetener in US talks, sources say* (Apr. 29, 2025), (Reuters) EDIS Doc. No. 850321. The future level of these duties is therefore highly uncertain.

markets.[166] Indeed, the Indian industry continues to export substantial quantities of ceramic tile to Kuwait, Oman, and the United Arab Emirates despite facing antidumping duties ranging from 17.6 percent to 70.2 percent in those markets, and these countries remain among the Indian industry's top export markets.[167] If these other markets are attractive despite the restraining effects of antidumping duties, it is not likely that 10 percent duties under IEEPA will substantially restrain subject import volumes, particularly given the relative attractiveness of the U.S. market to subject producers/exporters and the increasing capacity and production of the Indian industry.

In sum, the record indicates that the industry in India has both the ability and incentive to substantially increase the volume of exports to the United States in the imminent future. Subject imports and their market share increased rapidly from 2021 to 2023 and in interim 2024. The United States is India's largest export market, with higher average unit values than the Indian industry's other primary export markets. The industry in India has large existing capacity and substantial excess capacity and inventories, and it projects increases in capacity and production. In light of these considerations, we find the likelihood of substantially increased imports of subject merchandise into the United States in the imminent future.

2. Likely Price Effects of the Subject Imports

As observed above, the record indicates that there is a moderate-to-high degree of substitutability between subject imports and the domestic like product, and that price is an important factor in purchasing decisions for ceramic tile, along with other factors. As discussed further below, we find that subject imports are likely to have significant price effects in the imminent future.

In the final phase of this investigation, the Commission collected quarterly pricing data from U.S. producers and importers for four ceramic tile products.[168] Ten U.S. producers and

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[166] MSI's Prehearing Br. at 45; CR/PR at 7.20-7.21, Table 7.11.

[167] *See* CR/PR at 7.20, Table 7.11; MSI Prehearing Br, Exhibit 3, "Indian Ceramic Tile Exports," Apr. 16, 2024, in *Ceramic World Web.*

[168] The four pricing products are as follows:

Product 1.-- Porcelain tile, rectangular, 6"–8" in width by 24"–36" in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers;

Product 2.-- Porcelain tile, rectangular, 12" in width by 24" in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Product 3.-- Non-porcelain ceramic tile, square or rectangular, 3"–6" in width by 6"–12" in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Product 4.-- Porcelain tile, square or rectangular, 24"-48" in width by 24"-48" in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers.
CR/PR at 5.5.

MSI argues in its posthearing brief that these pricing products are too broadly drawn because they contain products of differing finishes and thicknesses. MSI's Prehearing Br. at 34; MSI's Posthearing Br., Answers to Questions at 8-9 (citing Prehearing Report at 5.5 n.2). *See* CR/PR at 5.5 n.2. As an initial matter, we note that although MSI submitted comments on the Commission's draft questionnaires, it did not raise this issue or propose alternative definitions for consideration before (Continued...)

eight importers provided usable pricing data for sales of the requested products.[169] Pricing data reported by these firms accounted for approximately 46.2 percent of U.S. producers' U.S. shipments of ceramic tile and 29.3 percent of reported U.S. shipments of subject imports in 2023.[170]

Overall, prices for products imported from India were lower than those for domestically produced ceramic tile in 35 of 45 quarterly comparisons, and greater than those for domestically produced ceramic tile in 10 of 45 quarterly comparisons.[171] On a volume basis, there were *** square feet of reported subject import sales in quarters with underselling and *** square feet of reported subject import sales in quarters with overselling.[172] Margins of underselling ranged from *** to *** percent and averaged *** percent, while margins of overselling ranged from *** to *** percent and averaged *** percent.[173] Thus, subject imports undersold the domestic like product in *** percent of quarterly comparisons, with *** percent of the reported sales volume of subject imports in the quarters of underselling.[174] Responses to lost sales questions and

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issuance of, thereby preventing the Commission from evaluating the issue and potentially collecting additional data. *See* Comments on Draft Questionnaires (July 30, 2024), EDIS Doc. No. 827637.

We reiterate our finding above that there exists a moderate-to-high degree of substitutability between the domestic like product and subject imports and observe that the pricing product definitions substantially resemble those used both in the preliminary phase of these investigations and in the investigations on ceramic tile from China. *Preliminary Determinations*, USITC Pub. 5515 at 27 n.116; *Ceramic Tile from China*, USITC Pub. 5053 at 21 n.136. In addition to the pricing data, other record evidence indicates that subject imports were sold at lower prices than the domestic product. CR/PR at Table 2.11 (five of eight purchasers rating the U.S. product to be inferior on price compared to subject imports (*i.e.,* higher priced)) & Table 5.15 (three of four purchasers who bought subject imports instead of the domestic product reported that subject imports were lower priced). Thus, we consider the product definitions and subsequent findings based on these definitions reasonable and supported by the available record.

[169] CR/PR at 5.5. Not all firms reported pricing for all products for all quarters, and there were no sales of product 3 imported from India. CR/PR at 5.1.

[170] CR/PR at 5.5.

[171] CR/PR at Table 5.12.

[172] CR/PR at Table 5.12.

[173] CR/PR at Table 5.12.

[174] Derived from CR/PR at Table 5.12. MSI argues that subject import underselling margins reflect differences in quality between subject imports and the domestic like product that attenuate competition and that subject imports, unlike the domestic like product, serve the mass market. *See* MSI's Prehearing Br. at 17-18, 21; MSI's Posthearing Br. at 2-3, 10. We find this argument unpersuasive. As we noted above with respect to our finding of a moderate-to-high levels of substitutability between subject imports and the domestic like product, although some purchasers indicated that the quality of subject imports is inferior to the domestic product, an equal number indicated that subject imports and the domestic like product are of comparable quality, and five of six purchasers indicated that subject imports usually meet minimum quality requirements. CR/PR at Tables 2.9 & 2.11. Notably, the largest purchasers of subject imports, ***, all indicated that the quality of subject imports is comparable to that of the domestic like product. *See* CR/PR at Tables 5.14 & 5.15; Purchaser Questionnaire Responses at Question IV-3. Moreover, no purchaser that reported subject imports were priced lower than domestic (Continued...)

comparisons of import and domestic prices tended to confirm that subject import were often priced lower than domestic products.[175]

Notably, the prevalence of underselling, both in terms of the number of comparisons and volume involved, grew substantially over the POI. The percentage of quarterly comparisons with underselling rose from 66.7 percent in 2021 to 75.0 percent in 2022, 83.3 percent in 2022, and 88.9 percent in interim 2023.[176] The volume of subject imports that undersold the domestic like product increased from *** percent in 2021 to *** percent in 2022, *** percent in 2023, and *** percent in interim 2024.[177] Thus, the record shows pervasive and growing underselling by subject imports over the POI. As underselling by subject imports grew, so too did subject imports' market share. Specifically, subject imports' market share increased by 2.3 percentage points in 2022 and by a further 5.1 percentage points in 2023, each at the expense of nonsubject imports.[178] By interim 2024, however, subject imports' market share growth began to come in part at the expense of the domestic industry – specifically, subject imports gained 1.5 percentage points of market share in interim 2024 compared to interim 2023, 0.8 percentage points of which came at the expense of the domestic industry.[179]

During the POI, domestic prices increased for three of four pricing products, with price increases ranging from *** percent to *** percent; the fourth pricing product registered a ***

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product indicated that subject imports' lower prices reflect inferior quality. *See id.* While purchaser *** reported that European and U.S. producers offer higher priced, higher quality ceramic tiles that are more reliable than subject imports, it also states that subject imports are of higher quality and reliability than one would expect for the price. CR/PR at 2.18. Moreover, the largest channel of distribution during the 2021-2023 period both for domestically produced ceramic tile and for subject imports was big box retailers, which would likely be serving the "mass market." CR/PR at Table 2.1. Thus, contrary to MSI's position, the overall record does not evidence a particularly strong distinction between subject imports and the domestic like product along the lines alleged.

MSI's arguments are also at odds with its own questionnaire response, which indicates several differences other than price between domestically produced tile and the subject imports that suggest that subject imports should command a higher price than the domestic like product, including that subject imports are ***. *See* Email from Jared Wessel (Feb. 7, 2025), EDIS Doc. No. 844333 (cited at CR/PR at 5.5 n.2). Accordingly, the foregoing further indicates that MSI's claim is unsupported.

[175] CR/PR at Tables 2.11 & 5.15. Of 11 responding purchasers, four indicated that they purchased subject imports instead of the domestic product during the POI. CR/PR at 5.19. Three of these four purchasers indicated that subject imports were priced lower than the domestic product. *Id.* While no purchaser confirmed that price was a primary reason for buying subject imports instead of the domestic like product, responding purchasers reported that price was one of the factors they consider along with non-price factors. *See* CR/PR at table 5.15. As previously discussed, the record indicates that the domestic product is generally superior or comparable to subject imports on most purchasing factors.

[176] *Derived from* CR/PR at Table 5.13.

[177] *Derived from* CR/PR at Table 5.13.

[178] CR/PR at Tables 4.12 & C.1.

[179] CR/PR at Tables 4.12 & C.1.

percent price decrease over the POI.[180] Prices of subject imports decreased for two of three pricing products.[181] Although prices for the domestic like product generally increased during the POI, prices for pricing product 3, for which there were no sales of subject imports, increased by a far greater amount (*** percent) than prices for pricing products for which there were sales of subject imports (*** percent and *** percent), as well as a decline of *** percent.[182]

In percentage terms, the industry's net sales values did not keep pace with increases in its unit COGS. The domestic industry's per unit net sales value increased 15.0 percent from 2021 to 2023, which was less than the 18.3 percent increase in the industry's unit COGS over the same period.[183] Likewise, the domestic industry's per unit net sales value was 3.5 percent higher in interim 2024 than in interim 2023, while the industry's unit COGS was 3.8 percent higher.[184] In absolute terms, the domestic industry's per unit net sales value increased by $0.22 per square foot from 2021 to 2023, which exceeded the $0.18 per square foot increase in the industry's unit COGS over the same period.[185] The industry's per unit net sales values and unit COGS were $0.06 per square foot and $0.04 per square foot, respectively, higher in interim 2024 than in interim 2023.[186]

The domestic industry's greater percentage increases in unit COGS than in net sales unit value resulted in steady increases in the domestic industry's COGS-to-net sales ratio over the POI. Its COGS-to-net sales ratio increased from 66.3 percent in 2021 to 67.4 percent in 2022 and 68.2 percent in 2023, an increase of 1.9 percentage points.[187] The ratio was higher in interim 2024, at 70.3 percent, compared to 70.2 percent in interim 2023.[188]

In sum, we find that there is a moderate-to-high degree of substitutability between subject imports and the domestic like product, that price is an important factor in purchasing decisions for ceramic tile, along with other factors, and that underselling by subject imports was pervasive and increasing throughout the POI as subject imports gained market share,

[180] CR/PR at Table 5.9. During the POI, domestic prices increased by *** percent for Pricing Product 1, *** percent for Pricing Product 2, and *** percent for Pricing Product 3. *Id.* No purchaser indicated that U.S. producers had reduced prices in order to compete with lower-priced imports from India. CR/PR a 5.19. Six purchasers reported that U.S. producers had not lowered prices in order to compete with lower-priced subject imports during the POI, while six purchasers reported that they did not know if this had occurred. CR/PR at Table 5.16.

[181] During the POI, prices for subject imports decreased by *** percent for Pricing Product 1 and *** percent for pricing product 4; prices increased *** percent for Pricing Product 2. CR/PR at Table 5.9. Importers of subject merchandise reported no pricing data for pricing product 3. *Id.*

[182] *See* CR/PR at Table 5.9.

[183] CR/PR at Table 6.2.

[184] CR/PR at Table 6.2.

[185] CR/PR at Table 6.2.

[186] CR/PR at Table 6.2.

[187] CR/PR at Tables 6.2 & C.1.

[188] CR/PR at Tables 6.2 & C.1.

culminating with a market share gain at the expense of the domestic industry in interim 2024 following gains at the expense of nonsubject imports.[189] [190]

In light of these findings, we find that subject imports and the domestic like product are likely to continue to compete against each other, that price will likely continue to be an important factor in purchasing decisions, and that the likely significant and substantially increasing volumes of subject imports are likely to significantly and increasingly undersell the domestic like product. The large and increasing volumes of lower-priced subject imports will likely have depressive or suppressive effects on prices for the domestic like product to a significant degree in the imminent future and create demand for additional subject imports. As a result, the domestic industry will be forced to lower its prices, forgo needed price increases, or lose sales and market share to subject imports, as occurred in interim 2024 when increasing volumes of subject imports began to take market share from the domestic industry. We thus find that subject imports are likely to have significant price effects in the imminent future.

3. Likely Impact of the Subject Imports

The domestic industry's performance deteriorated over the POI as the volume of low-priced subject imports increased in absolute and relative terms, and apparent U.S. consumption declined.[191] Its share of apparent U.S. consumption fluctuated over the POI, increasing slightly from 2021 to 2023, then declining in interim 2024 as the industry lost market share to increasingly low-priced volumes of subject imports.

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[189] Prior to the POI, nonsubject imports from China largely exited the U.S. market following the Commission's investigation in *Ceramic Tile from China*. *See* CR/PR at Table G.1. To the extent that underselling by subject imports enabled subject imports to gain market share over the POI that domestic producers otherwise would have gained after nonsubject imports from China vacated the market following imposition of orders on Chinese imports in 2020, such evidence would support a finding of adverse price effects.

[190] Commissioner Johanson does not join the prior footnote. The record indicates that nonsubject imports from China largely exited the U.S. market prior to the beginning of the POI. CR/PR at Table G.1. Imports of ceramic tile from China declined from 431.5 million square feet in 2019 to 7.7 million square feet in 2020 and 2.2 million square feet in 2021, and were more than replaced by imports from other sources by 2021. *Id*. Imports from China accounted for zero percent of apparent U.S. consumption in each year of the POI. *See* CR/PR at Tables C.1, G.1. Therefore, declining Chinese imports would not have resulted in the domestic industry gaining market share during the POI (2021–September 2024) as such imports had already exited the market in 2020, prior to the beginning of the POI.

While Commissioner Johanson would find that increasing volumes of subject imports which undersold the domestic like product and gained market share at the expense of the domestic industry supports a finding of significant price effects, the record here does not support such a finding. While subject imports from India (as well as imports from other sources) increased in 2019 and 2020 following the decline in nonsubject imports from China, the record does not indicate whether underselling enabled this increase in subject imports as the POI begins in 2021. Moreover, in 2021 the majority of subject import volume was priced higher than the domestic like product. CR/PR at Table 5.13.

[191] CR/PR at Table C.1.

The domestic industry's practical capacity increased by 5.1 percent from 2021 to 2023, but was 2.8 percent lower in interim in 2024 than in interim 2023.[192] The industry's production declined by 2.5 percent from 2021 to 2023 and was 9.0 percent lower in interim in 2024 than in interim 2023.[193] Its practical capacity utilization rate declined by 6.4 percentage points from 2021 to 2023 and was 5.3 percentage points lower in interim 2024 than in interim 2023.[194]

The domestic industry's number of production and related workers ("PRWs"), total hours worked, and wages paid all increased from 2021 to 2023 and were higher in interim 2024 than in interim 2023.[195] Its hourly wages also increased from 2021 to 2023, but were lower in interim 2024 than in interim 2023.[196] The domestic industry's productivity declined irregularly from 2021 to 2023 and was lower in interim 2024 than in interim 2023.[197]

The domestic industry's U.S. shipments decreased by 6.2 percent from 2021 to 2023 and were 9.1 percent lower in interim 2024 than in interim 2023.[198] The industry's market share increased from 27.8 percent in 2021 to 28.4 percent in 2022 and 28.7 percent in 2023, for an overall increase of 0.9 percentage points during the POI.[199] This trend reversed in interim 2024 however, and its market share was lower, at 27.7 percent in interim 2024, compared to 28.6 percent in interim 2023.[200]

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[192] CR/PR at Table C.1. The domestic industry's practical capacity increased from 1.0 billion square feet in 2021 and 2022 to 1.1 billion square feet in 2023. *Id*. It was 771.9 million square feet in interim 2024, compared to 794.2 million square feet in interim 2023. *Id.*

[193] CR/PR at Table C.1. The domestic industry's production increased from 891.5 million square feet in 2021 to 896.0 million square feet in 2022 and then declined to 868.9 million square feet in 2023. *Id*. Production was 607.0 million square feet in interim 2024, compared to 667.0 million square feet in interim 2023. *Id.*

[194] CR/PR at Table C.1. The domestic industry's capacity utilization rate was 88.8 percent in 2021, 87.0 percent in 2022 and 82.4 percent in 2023; it was 78.6 percent in interim 2024, compared to 84.0 percent in interim 2023. *Id.*

[195] CR/PR at Table C.1. The domestic industry's number of PRWs increased from 3,665 PRWs in 2021 to 3,765 PRWs in 2022 and 3,958 PRWs in 2023; it was 4,117 PRWs in interim 2024, compared to 3,988 PRWs in interim 2023. *Id.* Wages paid increased from $211.0 million in 2021 to $224.1 million in 2022 and $243.5 million in 2023; it was $208.3 million in wages in interim 2024, compared to $186.7 million in interim 2023. *Id.* Total hours worked were 7.5 million hours in 2021 and 2022 before increasing to 7.9 million hours in 2023; they were 8.7 million hours in interim 2024, compared to 6.1 million hours in interim 2023. *Id.*

[196] CR/PR at Table C.1. Hourly wages increased from $28.04 per hour in 2021 to $29.82 per hour in 2022 and $30.74 per hour in 2023; they were lower in interim 2024 at $23.96 per hour, compared to $30.60 per hour in interim 2023. *Id.*

[197] CR/PR at Table C.1. Productivity increased from 118.5 square feet per hour in 2021 to 119.2 square feet per hour in 2022 and then declined to 109.7 square feet per hour in 2023; it was 69.8 square feet per hour in interim 2024, compared to 109.3 square feet per hour in interim 2023. *Id.*

[198] CR/PR at Table C.1. The domestic industry's U.S. shipments increased from 854.8 million square feet in 2021 to 861.8 million square feet in 2022, before declining to 801.7 million square feet in 2023; they were 553.6 million square feet in interim 2024, compared to 609.3 million square feet in interim 2023. *Id.*

[199] CR/PR at Table C.1.

[200] CR/PR at Table C.1.

The domestic industry's end-of-period inventories increased by 7.5 percent from 2021 to 2023 and were 10.0 percent higher in interim 2024 than in interim 2023.[201] As a ratio to total shipments, the domestic industry's end-of-period inventories decreased from 34.6 percent in 2021 to 34.1 percent in 2022, and then increased to 39.5 percent in 2023; the ratio increased substantially and reached a period high of 46.1 percent in interim 2024, compared to 38.1 percent in interim 2023.[202]

The domestic industry's financial performance indicia generally deteriorated over the POI. Its net sales revenues increased by 8.4 percent from 2021 to 2023, but were 6.0 percent lower in interim 2024 than in interim 2023.[203] Its gross profits increased by 2.4 percent from 2021 to 2023, but were 6.6 percent lower in interim 2024 than in interim 2023.[204] Its operating income declined by 58.7 percent from 2021 to 2023, and turned into an operating loss in interim 2024.[205] The industry's net income declined from 2021 to 2022 and became a net loss in 2023 that worsened in interim 2024.[206]

As a ratio to net sales, the industry's operating income declined from 5.5 percent in 2021 to 4.7 percent in 2022, and 2.1 percent in 2023; the ratio was an operating loss of 1.3 percent in interim 2024, compared to an operating profit of 0.6 percent in interim 2023.[207] The industry's net income as a share of net sales declined from 4.4 percent in 2021 to 3.7 percent in 2022 and to a net loss of 0.3 percent in 2023; the industry reported a net loss of 4.9 percent in interim 2024, compared to a net loss of 1.9 percent in interim 2023.[208]

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[201] CR/PR at Tables 3.11 & C.1. The domestic industry's end-of-period inventories decreased from 300.0 million square feet in 2021 to 299.2 million square feet in 2022 and increased to 322.4 million square feet in 2023; they were 346.4 million square feet in interim 2024, compared to 315.0 million square feet in interim 2023. *Id.*

[202] CR/PR at Tables 3.11 & C.1.

[203] CR/PR at Table C.1. The domestic industry's net sales revenues increased from $1.25 billion in 2021 to $1.37 billion in 2022 and declined to $1.35 billion in 2023; they were $969.7 million in interim 2024, compared to $1.0 billion in interim 2023. *Id.*

[204] CR/PR at Table C.1. The domestic industry's gross profits increased from $420.9 million in 2021 to $448.6 million in 2022 and then declined to $430.8 million in 2023; they were lower, at $287.5 million, in interim 2024, compared to $307.8 million in interim 2023. *Id.*

[205] CR/PR at Table C.1. The domestic industry's operating income declined from $68.8 million in 2021 to $65.0 million in 2022 and $28.4 million in 2023. *Id.* The industry reported an operating loss of $12.7 million in interim 2024, compared to operating income of $6.3 million in interim 2023. *Id.*

[206] The domestic industry's net income declined from $54.4 million in 2021 to $51.0 million in 2022, before turning into an operating loss of $4.0 million in 2023. It reported a net loss of $47.3 million in interim 2024, compared to a net loss of $19.9 million in interim 2023. *Id.*

[207] CR/PR at Table C.1.

[208] CR/PR at Table C.1. MSI argues that increases in the domestic industry's SG&A arising from its capital investments and hiring of new employees account for the industry's weakening performance. MSI's Posthearing Br., Answers to Questions at 10-13. However, changes in the domestic industry's SG&A cannot account for the declines in the industry's condition after 2022. Gross profits (calculated before SG&A expenses) were lower in 2023 than in 2022 absolutely and as a ratio to net sales, as well as in interim 2024 compared to interim 2023. *See* CR/PR at Table 6.1. Thus, increasing SG&A expenses do not fully explain the declines in the industry's profitability toward the end of the POI. Moreover, (Continued...)

The domestic industry's capital expenditures increased from $42.0 million in 2021 to $147.2 million in 2022 and $225.7 million in 2023.[209] Its R&D expenses increased by 88.4 percent from 2021 to 2023.[210] The industry's operating return on assets increased from 3.1 percent in 2021 to 3.2 percent in 2022, and then decreased to 1.4 percent in 2023.[211] Eight of nine domestic producers reported negative effects on their investment, and six firms reported negative effects on growth and development due to subject imports.[212]

We find the domestic industry is vulnerable to material injury in the imminent future. Despite investing in new capacity during the POI following the imposition of the China orders, the industry was not able during the POI to meaningfully capitalize on the decline in nonsubject imports from China as the volume of subject imports increased.[213] The domestic industry's production declined over the POI, as did its capacity utilization rate and U.S. shipments, while its inventories increased.[214] The domestic industry's COGS-to-net-sales ratio increased steadily during the POI, and the domestic industry's gross profits declined from 2022 to 2023 and in interim 2024 compared to interim 2023.[215] The industry's operating income and net income turned into losses by the end of the POI, with the domestic industry registering $12.7 million in operating losses and $47.3 million in net losses in interim 2024.[216] [217]

With the domestic industry in this weakened state, we find that the likely significantly increased volume of subject imports, their likely significant underselling, and likely significant

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Petitioner contends that increased SG&A expenses resulted at least in part from subject import competition, as increased subject import penetration during the POI, particularly in the big box retailer segment, caused the domestic industry to increase its sales to other channels of distribution. These increased sales to channels of distribution with "multiple entry points" reportedly resulted in an increase in the industry's SG&A expenses. CR/PR at 6.21 n.21 & Table 2.1.

[209] CR/PR at Table C.1. The industry reported capital expenditures of $50.2 million in interim 2024, compared to $169.6 million interim 2023. *Id.* Several firms reported expansions and one reported opening a new plant. CR/PR at Table 3.4

[210] CR/PR at Table C.1. The domestic industry's R&D expenses increased from $13.3 million in 2021 to $21.9 million in 2022 and $25.1 million in 2023. R&D expenses were $18.5 million in interim 2024, compared to $18.7 million in interim 2023. *Id.*

[211] CR/PR at Table 6.10.

[212] CR/PR at Table 6.13. Several firms described specific instances of delayed upgrades, expansions, and purchases of new equipment. *Id.*

[213] Commissioner Johanson does not join this sentence. He notes that the record is limited or nonexistent as to the domestic industry's operations and condition in 2020, which is when nonsubject imports from China exited the market and were largely replaced by imports from India and, to a greater degree, by imports from all other sources, whether subject imports from India substantially prevented the domestic industry from benefiting from the orders on imports from China, or whether other intervening factors may have prevented the domestic industry from benefitting from the orders on imports from China. *See* CR/PR at Table G.1.

[214] CR/PR at Tables 3.5, 3.8, 3.11, C.1.

[215] CR/PR at Tables 6.1 & C.1.

[216] CR/PR at Tables 6.1 & C.1.

[217] Based on the record of this investigation, we would not have found material injury by reason of subject imports but for the suspension of liquidation of entries of subject merchandise. *See* 19 U.S.C. § 1673d(b)(4)(B).

price effects in the imminent future threaten material injury to the domestic industry. As noted above, anticipating increased shipments and sales following imposition of antidumping and countervailing duty orders on ceramic tile from China in 2020, the domestic industry invested in new capacity and production.[218] That capacity remained underutilized, however, as increasing volumes of low-priced subject imports rapidly entered the U.S. market, more than doubling their market share from 7.1 percent in 2021 to 15.7 percent in interim 2024. As subject imports increased, they gained 7.4 percentage points of market share from nonsubject imports from 2021 to 2023, and in interim 2024, gained 0.8 percentage points of market share at the expense of the domestic industry.[219] As subject import's presence in the U.S. market grew, the domestic industry's performance deteriorated.

We find that the likely substantial increase in subject imports and their likely underselling will significantly impair the domestic industry's performance in the imminent future. As discussed above, subject imports predominantly undersold the domestic product throughout the POI, increasing in intensity over the POI and culminating in the greatest share of underselling by instances and volume in interim 2024. As also discussed above, subject imports, after gaining market share from nonsubject imports from 2021 to 2023, began taking market share from the domestic industry in interim 2024. We find that in view of the Indian industry's growing and substantial capacity and focus on the U.S. market as detailed above, substantially increased volumes of low-priced subject imports are likely to enter the U.S. market in the imminent future. We find that this increased presence of low-priced subject imports in the U.S. market will result in pressure on domestic producer prices, preventing U.S. producers from obtaining prices sufficient to operate profitably, or, if U.S. producers cannot compete on price with low-priced imports, resulting in subject imports taking additional market share and sales from domestic producers. Lost market share and sales will negatively affect the domestic industry's production, capacity utilization, shipments, and employment. Likely suppressed or depressed prices and/or lost sales will negatively affect the domestic industry's revenues, profits, and ability to make capital improvements. All but one domestic producer

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[218] CR/PR at 6.30; Hearing Tr. at 40-41, 43 (Lutz); *Id.* at 36 (Durbin); Petitioner's Prehearing Br. at 3, 22, 38, 43-44.

[219] CR/PR at Tables 4.12 & C.1.

We also observe that, based on questionnaire data, which allows for an examination of subject import volumes by channel of distribution, subject imports increased as a share of sales to big box retailers (the largest channel of distribution for ceramic tile) at the expense of the domestic industry throughout the POI. CR/PR at Table 4.17. Specifically, subject imports' share of reported shipments to big box retailers increased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023, and was *** percent in interim 2024, compared to *** percent in interim 2023, whereas the domestic industry's share of shipments to big box retailers declined from *** percent in 2021 to *** in 2022 and *** percent in 2023, and was *** percent in interim 2024, compared to *** percent in interim 2023. *Id.* Indeed, by interim 2024, subject imports from India had supplanted the U.S. industry as the largest suppliers to big box retailers. *Id.* Subject imports also increased as a share of shipments to every channel of distribution over the POI, as the domestic industry's share declined overall during the POI for sales to distributors, other end users, and other retailers. CR/PR at Tables 2.1 & 4.16-4.20. With a likely substantial increase in subject imports imminent, these trends will likely continue and worsen, exacerbating the impact of subject import competition on the domestic industry.

reported that they anticipate negative effects from subject imports absent relief.[220] In sum, we find that the likely substantial increase in low-priced subject imports will likely have a significant impact on the domestic industry in the imminent future.[221]

MSI asserts that subject imports only compete in portions of the market that the domestic industry does not serve. Contrary to MSI's arguments, the record does not indicate that differences in channels of distribution[222] or product mix attenuate competition between subject imports and domestically produced ceramic tile.[223] Nor does the record indicate that

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[220] *See* CR/PR at 6.30-6.31. Such effects include loss of sales to builders and at big box stores, as well as shutdowns and other negative effects. *See id.*

[221] MSI asserts that most domestic producers are related to one or more foreign producers and claims that the domestic industry filed its petitions to protect imports from Brazil and Mexico from competition with subject merchandise, particularly focusing on *** and ***. MSI's Posthearing Br. at 2, 10-11. *See* CR/PR at Table 3.3. This claim is misplaced. As reviewed above, we find that subject imports threaten material injury to the domestic industry in the imminent future. Whether nonsubject imports from Brazil or Mexico may benefit from imposition of antidumping and countervailing duty orders on subject imports does not impact this finding.

Moreover, only two of ten domestic producers are affiliated with producers in Brazil or Mexico, while nine domestic producers are petitioners (and ***). We find it unlikely that all of these firms would support petitions to protect their competitors' foreign affiliates from competition in the U.S. market. In addition, nearly all producers increased their capital expenditures from 2021 to 2023, indicating they remain committed to domestic production. See CR/PR at Tables 3.1 and 6.5. More specifically, ***, which is related to producers and importers of ceramic tile from several countries (and its related importer accounts for 90.3 percent of nonsubject imports from Mexico), accounted for slightly over half of domestic production, and it had substantial capital investments throughout the POI. Its domestic production was over *** each year of the POI. CR/PR at Table 3.7; *** U.S. importer Questionnaire at II-8a & II-10a. ***, which is related to producers and importers of ceramic tile from Brazil, invested in a substantial production facility in the United States over the POI, with a capital investment of $67.6 million in 2023. CR/PR at Tables 3.3 & 6.5.

[222] *See* MSI's Prehearing Br. at 18-21; MSI's Posthearing Br. at 10-12. With respect to channels of distribution, responding U.S. producers and importers reported shipments through all channels of distribution, including distributors, big box retailers, other retailers, contractors, and other end users. CR/PR at 2.2 & Table 2.1. In 2023, for example, domestic producers sold mainly to big box stores (*** percent of their U.S. shipments in 2023), distributors (***), and contractors (*** percent). While *** percent of importers' U.S. shipments of subject imports were to big box stores, they also shipped to all the other channels. Although MSI argues that the domestic industry has traditionally not focused on sales to big-box stores, such that its loss of market share to subject imports in this channel should not be considered injurious, *see* MSI's Posthearing Br., Answers to Questions at 24, big box retailers were the largest channel of distribution for the domestic industry during 2021-2023, and over 40.0 percent of the industry's sales were to big box stores in the *Ceramic Tile from China* investigation. *See* CR/PR at Table 2.1; *Ceramic Tile from China,* USITC Pub. 5053 at Table II-2.

[223] MSI argues that ceramic tile from India is mostly polished and rectified tile that the domestic industry does not produce, so competition between the domestic product and subject imports is limited. *See*, e.g., MSI's Posthearing Br. at 8. It is true that the great majority of shipments of subject imports in 2023 consisted of rectified ceramic tile, but *** percent of U.S. shipments of ceramic tile also consisted of rectified tile. *See* CR/PR at Tables 3.10 and 4.7. While the great majority of the domestic (Continued...)

subject imports primarily compete with certain nonsubject imports rather than the domestic like product.[224]

We have also considered other factors to ensure that we are not attributing to subject imports any likely injury that will actually result from other causes. The quantity and market share of nonsubject imports declined from 2021 to 2023 and were lower in interim 2024 than in interim 2023.[225] The Commission collected pricing data for nonsubject imports from Brazil, Italy, Mexico, and Spain.[226] In general, the data show that nonsubject imports were priced higher than the domestic like product and subject imports.[227] While nonsubject imports from Brazil were predominantly lower priced than subject imports and domestically produced ceramic tile, nonsubject imports from Brazil declined absolutely and as a share of apparent U.S.

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industry's U.S. shipments were matte ceramic tile in 2023, *** percent of subject imports were also matte. *See* CR/PR at Tables 3.10 and 4.7. Further, both U.S. producers' shipments (***) and U.S. importers' U.S. shipments of subject imports (*** in 2023 consisted primarily of porcelain tile. *Id.* at Tables 3.9 and 4.5. Similarly, both U.S. producers' shipments (***) and U.S. importers' U.S. shipments of subject imports (*** in 2023 consisted primarily of floor tile (not wall tile). Preliminary Phase Staff Report at III-11 & Tables D-4 & D-5. Moreover, both the domestic industry and subject importers shipped every type of ceramic tile to U.S. customers in 2024. CR/PR at Tables 3.10 and 4.7. Thus, the subject imports and the domestic product overlap to a substantial degree in product types.

Moreover, although their sales of ceramic tile were concentrated in matte tile in 2023, the majority of domestic producers produce polished tile. U.S. Producer Questionnaire Responses at II-11; Hearing Tr. at 92 (Caselli). Two domestic producers of polished tile, ***, indicated that they *** in response to low-priced subject imports during the POI. CR/PR at Table 3.4; Petitioner's Posthearing Br., Exhibit A at 3-4. In addition, two more producers, ***, reported that they delayed installing polishing equipment due to subject import competition. *See* CR/PR at Table 6.14. The record therefore indicates that subject imports are competing with the domestic industry's products and are likely to continue to do so, notwithstanding differences in product mix that may be caused at least in part by subject imports.

[224] While MSI argues that Indian imports compete with imports from Brazil and Mexico for "mass market" sales rather than with the domestic industry and imports from Italy and Spain for "high end" sales, the record does not support this claim. MSI's Prehearing Br. at 18-20; MSI's Posthearing Br. at 11. Purchasers most frequently reported that the U.S. product and imports from India, Brazil, and Mexico usually meet minimum quality specifications, and most frequently reported that imports from Italy and Spain always meet minimum quality specifications. CR/PR at 2.9. Moreover, the largest channel of distribution during the 2021-2023 period both for domestically produced ceramic tile and for subject imports, as well as for nonsubject imports, was big box retailers, which would likely be serving the "mass market." CR/PR at Table 2.1. In addition, contrary to MSI's claims, pricing data collected for nonsubject imports show that prices for the domestic like product were generally closer to prices for imports from India, Brazil, and Mexico than to prices for imports from Italy and Spain. CR/PR at D.3-D.15. Finally, as discussed above, questionnaire responses generally reported interchangeability and substitutability between subject imports and the domestic like product. *See* CR/PR at Tables 2.12, 2.13 & 2.14. Thus, MSI's position is unsupported by the record.

[225] *See* CR/PR at Tables 4.2, 4.12, & C.1.

[226] CR/PR at Appendix D.

[227] Prices for ceramic tile imported from Brazil, Italy, Mexico, and Spain were higher than prices for domestically produced ceramic tile in 155 instances and lower in 57 instances. CR/PR at D.3 & Table D.5. Prices for ceramic tile imported from Brazil, Italy, Mexico, and Spain were higher than prices for ceramic tile imported from India in 118 instances and lower in 44 instances. *Id.*

consumption throughout the POI.[228] AUVs for nonsubject imports also were otherwise higher than those of subject imports.[229] Further, AUVs for nonsubject imports increased from 2021 to 2023, while AUVs for subject imports declined. Therefore, nonsubject imports do not account for the threat of material injury we attribute to subject imports.

Demand also does not account for the threat of material injury we attribute to subject imports. As discussed above, demand was weak during the POI; apparent U.S. consumption declined from 2021 to 2023 and was lower in interim 2024. However, weak demand did not deter the increase in subject import volume and market share during the POI.[230] The record likewise does not suggest that any future decline in demand would prevent increases in subject import volume in the imminent future. MSI asserts that demand for ceramic tile will recover in 2025, but there is limited evidence indicating that the decline in demand observed during the POI will end in the imminent future.[231] In any event, if demand were to increase in the imminent future, the likely increased volume of lower-priced subject imports would still be likely to capture a share of any increased demand, leaving the domestic industry with fewer sales and worse financial performance than would otherwise be the case. Accordingly, demand does not account for the threat of material injury we attribute to subject imports, nor is it likely to insulate the domestic industry from the likely significant impact of subject imports in the imminent future.[232] Finally, with respect to MSI's arguments that the domestic industry is being impacted by competition from luxury vinyl tile ("LVT"), the data provided by both Petitioner and MSI show that ceramic tile did not lose share in the overall flooring market during the POI even as the share of LVT increased, indicating that growth in use of LVT did not come at the expense of ceramic tile during the POI, but rather at the expense of other floor covering products.[233]

VI. Conclusion

For the reasons stated above, we determine that an industry in the United States is threatened with material injury by subject imports of ceramic tile from India that are subsidized by the government of India.

[228] CR/PR at Tables C.1 & D-5.

[229] CR/PR at Table C.1. Nonsubject imports from Brazil and Mexico had lower AUVs than subject imports during 2021 and 2022. *Id.*

[230] CR/PR at Tables 4.2 & 4.12.

[231] *See* MSI's Prehearing Br. at 44 & Exhibit 2.

[232] Petitioner maintains that LVT is substituted for types of flooring other than ceramic tile, such as carpet and hardwood flooring. *See* Petitioner's Posthearing Br. at 10-11.

[233] *See* MSI's Prehearing Br. at 23; Petitioner's Posthearing Br. Exhibit A at 53 & Exhibit H.

Part 1: Introduction

Background

These investigations result from petitions filed with the U.S. Department of Commerce ("Commerce") and the U.S. International Trade Commission ("USITC" or "Commission") by Coalition for Fair Trade in Ceramic Tile,[1] on April 19, 2024, alleging that an industry in the United States is materially injured and threatened with material injury by reason of subsidized and less-than-fair-value ("LTFV") imports of ceramic tile products ("ceramic tile")[2] from India. Table 1.1 presents information relating to the background of these investigations.[3] [4]

[1] The Coalition for Fair Trade in Ceramic Tile is comprised of Crossville, Inc., Crossville, TN; Dal-Tile Corporation ("Dal-Tile"), Dallas, TX; Del Conca USA, Inc. ("Del Conca"), Loudon, TN; Wonder Porcelain, Lebanon, TN; Landmark Ceramics – UST, Inc. ("Landmark"), Mount Pleasant, TN; Florim USA ("Florim"), Clarksville, TN; Florida Tile, Lexington, KY; Portobello America Manufacturing LLC ("Portobello"), Pompano Beach, FL; and StonePeak Ceramics Inc. ("Stonepeak"), Chicago, IL. Petition, exhibit I-1.

[2] See the section entitled "The subject merchandise" in Part 1 of this report for a complete description of the merchandise subject in this proceeding.

[3] Pertinent Federal Register notices are referenced in appendix A, and may be found at the Commission's website (www.usitc.gov).

[4] Appendix B presents the witnesses who appeared at the Commission's hearing.

Table 1.1 Ceramic tile: Information relating to the background and schedule of this proceeding

Effective date	Action
April 19, 2024	Petitions filed with Commerce and the Commission; institution of the Commission's investigations (89 FR 31770, April 25, 2024)
May 9, 2024	Commerce's notice of initiation of antidumping duty (AD) and countervailing duty (CVD) investigations (89 FR 42836 and 42841, May 16, 2024)
June 3, 2024	Commission's preliminary determinations (89 FR 48687, June 7, 2024)
September 27, 2024	Commerce's preliminary CVD determination and alignment of final CVD determination with final AD determination (89 FR 79245, September 27, 2024)
December 2, 2024	Commerce's preliminary AD determination (89 FR 95182, December 2, 2024); scheduling of final phase of Commission investigations (89 FR 104206, December 20, 2024)
April 16, 2025	Commerce's final CVD determination (90 FR 17036, April 23, 2025); Commerce's final AD determination (90 FR 17030, April 23, 2025);
April 16, 2025	Commission's termination of India AD investigation following Commerce's negative final determination (90 FR 19227, May 6, 2025)
April 17, 2025	Commission's hearing
May 19, 2025	Commission's vote
June 2, 2025	Commission's views

Statutory criteria

Section 771(7)(B) of the Tariff Act of 1930 (the "Act") (19 U.S.C. § 1677(7)(B)) provides that in making its determinations of injury to an industry in the United States, the Commission--

> *shall consider (I) the volume of imports of the subject merchandise, (II) the effect of imports of that merchandise on prices in the United States for domestic like products, and (III) the impact of imports of such merchandise on domestic producers of domestic like products, but only in the context of production operations within the United States; and. . . may consider such other economic factors as are relevant to the determination regarding whether there is material injury by reason of imports.*

Section 771(7)(C) of the Act (19 U.S.C. § 1677(7)(C)) further provides that--[5]

> *In evaluating the volume of imports of merchandise, the Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States is significant.. . .In evaluating the*

[5] Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

effect of imports of such merchandise on prices, the Commission shall consider whether. . .(I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree.. . . In examining the impact required to be considered under subparagraph (B)(i)(III), the Commission shall evaluate (within the context of the business cycle and conditions of competition that are distinctive to the affected industry) all relevant economic factors which have a bearing on the state of the industry in the United States, including, but not limited to. . . (I) actual and potential decline in output, sales, market share, gross profits, operating profits, net profits, ability to service debt, productivity, return on investments, return on assets, and utilization of capacity, (II) factors affecting domestic prices, (III) actual and potential negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment, (IV) actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and (V) in {an antidumping investigation}, the magnitude of the margin of dumping.

In addition, Section 771(7)(J) of the Act (19 U.S.C. § 1677(7)(J)) provides that—[6]

(J) EFFECT OF PROFITABILITY.—The Commission may not determine that there is no material injury or threat of material injury to an industry in the United States merely because that industry is profitable or because the performance of that industry has recently improved.

Organization of report

Part 1 of this report presents information on the subject merchandise, subsidy rates/dumping margins, and domestic like product. Part 2 of this report presents information on conditions of competition and other relevant economic factors. Part 3 presents information on the condition of the U.S. industry, including data on capacity, production, shipments, inventories, and employment. Parts 4 and 5 present the volume of subject imports and pricing of domestic and imported products, respectively. Part 6 presents information on the financial experience of U.S. producers. Part 7 presents the statutory requirements and information obtained for use in the Commission's consideration of the question of threat of material injury as well as information regarding nonsubject countries.

[6] Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

Market summary

Ceramic tile is generally used to cover floors, walkways, counter- and table-tops, walls, and shower stalls. The leading U.S. producers of ceramic tile are ***, while leading producers of ceramic tile outside the United States include *** of India. The leading U.S. importers of ceramic tile from India are ***. Leading importers of ceramic tile from nonsubject countries (primarily Spain, Mexico, and Italy) include ***. U.S. purchasers of ceramic tile are firms that are distributors, large retailers, or end users; leading purchasers include ***.

Apparent U.S. consumption of ceramic tile totaled approximately 2.8 billion square feet ($3.9 billion) in 2023. Currently, 10 firms are known to produce the vast majority of ceramic tile in the United States. U.S. producers' U.S. shipments of ceramic tile totaled 802.0 million square feet ($1.3 billion) in 2023, and accounted for 28.7 percent of apparent U.S. consumption by quantity and 34.2 percent by value. U.S. imports from subject sources totaled 404.8 million square feet ($258.7 million) in 2023 and accounted for 14.5 percent of apparent U.S. consumption by quantity and 6.7 percent by value. U.S. imports from nonsubject sources totaled 1.6 billion square feet ($2.3 billion) in 2023 and accounted for 56.9 percent of apparent U.S. consumption by quantity and 59.2 percent by value.

Summary data and data sources

A summary of data collected in these investigations is presented in appendix C, table C.1. The Commission's questionnaires collected data for the years 2021 to 2023 and interim periods January to September of 2023 ("interim 2023") and January to September of 2024 ("interim 2024"). Except as noted, U.S. industry data are based on questionnaire responses of 10 firms that accounted for the vast majority of U.S. production of ceramic tile during 2023. U.S. imports are based on official Commerce statistics[7] and the questionnaire responses of 19 firms, representing over three quarters of U.S. imports from India, by quantity, and more than half of all imports from nonsubject sources, by quantity, in 2023.[8]

Previous and related investigations

Ceramic tile has been the subject of two trade remedy investigations (described below), a competitive assessment investigation of ceramic floor and wall tile industry,[9] five investigations under section 301(c)(2) of the Trade Expansion Act of 1962,[10] and one escape clause investigation under provisions of Section 7 of the Trade Agreements Extension Act of 1951.[11]

In April 1971, the United States Tariff Commission (predecessor to the Commission) determined that an industry in the United States was being injured by the importation of

[7] U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed May 7, 2024.

[8] Coverage calculated by dividing total quantity of subject and nonsubject imports as reported in questionnaires into official Commerce import statistics.

[9] Competitive Assessment of the U.S. Ceramic Floor and Wall Tile Industry, No. 332-156, USITC Publication 1442, October 1993.

[10] Ceramic Mosaic Tile Workers' Petition For Adjustment Assistance, Inv. No. TEA-W-5, TC Publication 115, November 25, 1963; Tariff Commission Reports To The President On Petition For Adjustment Assistance By The National Tile & Manufacturing Co., Inv. No. TEA-F-5, TC Publication 145, December 21, 1964; Ceramic Floor and Wall Tile: Certain Workers of The Cambridge Tile Mfg. Co., Inv. No. TEA-W-11, TC Publication 318, March 1970; Ceramic Wall Tile: Workers of The Cambridge Tile Mfg. Co., Inv. No. TEA-W-134, TC Publication 481, May 1972.

[11] Ceramic Mosaic Tile, Inv. No. 7-100, TC Publication 16, May 1961.

ceramic wall tile from the United Kingdom.[12] In August 1973, the United States Tariff Commission determined that an industry in the United States was not being or was not likely to be injured by the importation of ceramic glazed wall tile from the Philippines.[13]

On April 10, 2019, Commerce and the USITC received petitions from the Coalition for Fair Trade in Ceramic Tile, alleging that an industry is being materially injured and threatened with material injury by reason of subsidized and LTFV imports of ceramic tile from China. On April 7, 2020, Commerce issued an affirmative final determination, and on May 28, 2020, the Commission issued an affirmative final determination.[14] On June 1, 2020, Commerce issued its antidumping and countervailing duty orders on imports of ceramic tile from China with the final weighted-average dumping margins ranging from 229.04 to 356.02 percent and net subsidy margins ranging from 203.71 to 330.69 percent.[15]

Nature and extent of subsidies and sales at LTFV

Subsidies

On April 23, 2025, Commerce published a notice in the Federal Register of its final determination of countervailable subsidies for producers and exporters of ceramic tile from India.[16] Table 1.2 presents Commerce's findings of subsidization of ceramic tile in India.

Table 1.2 Ceramic tile: Commerce's final subsidy determination with respect to imports from India

Entity	Final countervailable subsidy rate (percent)
Antiqa Minerals	3.45
Win-Tel Ceramics Private Limited	3.06
All others	3.18

Source: 90 FR 17036, April 23, 2025.

Note: Commerce found Win-Tel Ceramics Private Limited to be cross-owned with Theos Tiles LLP.

Note: For further information on programs determined to be countervailable, see Commerce's associated Issues and Decision Memorandum.

[12] Ceramic Wall Tile from the United Kingdom, Inv. No. AA1921-68, TC Publication 381, April 1971, p. 2.

[13] Ceramic Glazed Wall Tile from the Philippines, Inv. No. AA1921-120, TC Publication 599, August 1973, p. 2.

[14] 85 FR 19425, April 7, 2020; 85 FR 32048, May 28, 2020.

[15] 85 FR 33089, June 1, 2020.

[16] 90 FR 17036, April 23, 2025.

Sales at LTFV

On April 23, 2025, Commerce published a notice in the Federal Register of its final negative determination of sales at LTFV with respect to imports from India.[17] Table 1.3 presents Commerce's dumping margins with respect to imports of product from India.

Table 1.3 Ceramic tile: Commerce's final weighted-average LTFV margins with respect to imports from India

Exporter/Producer	Final dumping margin (percent)
Antiqa Minerals	0.00
Win-Tel Ceramic Private Limited	0.00

Source: 90 FR 17030, April 23, 2025.

Note: Commerce determined that Antiqa Minerals, Antiqa Ceramic Pvt. Ltd., Shivam Enterprise, Antiek Vitrified LLP, and Antique Non Woven Pvt. Ltd., are a single entity. See Final Decision Memorandum.

[17] 90 FR 17030, April 23, 2025.

The subject merchandise

Commerce's scope

In the current proceeding, Commerce has defined the scope as follows:[18]

> *The merchandise covered by this investigation is ceramic flooring tile, wall tile, paving tile, hearth tile, porcelain tile, mosaic tile, flags, decorative tile, finishing tile, and the like (hereinafter ceramic tile). Ceramic tiles are articles containing a mixture of minerals including clay (generally hydrous silicates of alumina or magnesium) that are fired so the raw materials are fused to produce a tile that is less than 3.2 cm in thickness, exclusive of decorative features. All ceramic tile is subject to the scope regardless of end use, surface area, and weight, regardless of whether the tile is glazed or unglazed, regardless of the water absorption coefficient by weight, regardless of the extent of vitrification, and regardless of whether or not the tile is on a backing. Subject merchandise includes ceramic tile "slabs" or "panels" (tiles that are larger than 1 meter2 (11 ft2)).*
>
> *Subject merchandise includes ceramic tile that undergoes minor processing in a third country prior to importation into the United States. Similarly, subject merchandise includes ceramic tile produced that undergoes minor processing after importation into the United States. Such minor processing includes, but is not limited to, one or more of the following: beveling, cutting, trimming, staining, painting, polishing, finishing, additional firing, affixing a decorative surface to the tile, or any other processing that would otherwise not remove the merchandise from the scope of the investigation if performed in the country of manufacture of the in-scope product.*

Tariff treatment

Based upon the scope set forth by Commerce, information available to the Commission indicates that the merchandise subject to these investigations are provided for in the Harmonized Tariff Schedule of the United States ("HTS" or "HTSUS") under the following statistical reporting numbers of HTS heading 6907:[19] 6907.21.1005, 6907.21.1011,

[18] 89 FR 95182, December 2, 2024.

[19] Prior to January 1, 2017, ceramic tile was provided for in HTS subheadings 6907.10.00 and 6907.90.00 for unglazed ceramic tile, and HTS subheadings 6908.10.10, 6908.10.20, 6908.10.50, and 6908.90.00 for glazed ceramic tile. The general rate of duty was 10 percent ad valorem for all subheadings but 6908.10.50 and 6908.90.00, which were 8.5 percent ad valorem. HTSUS (2017) Basic (continued...)

6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051. The 2024 general rate of duty is 10 percent ad valorem for HTS subheadings 6907.21.10, 6907.21.20, 6907.21.30, 6907.22.10, 6907.22.20, 6907.22.30, 6907.23.10, 6907.23.20, 6907.23.30, 6907.30.10, 6907.30.20, 6907.30.30, 6907.40.10, 6907.40.20, and 6907.40.30; and 8.5 percent ad valorem for HTS subheadings 6907.21.40, 6907.21.90, 6907.22.40, 6907.22.90, 6907.23.40, 6907.23.90, 6907.30.40, 6907.30.90, 6907.40.40, and 6907.40.90.[20]

The subject merchandise may also be imported under the following HTS provisions 6905.10.00, 6905.90.00, 6913.90.2000, 6914.10.80, and 6914.90.80.[21] The 2019 column 1-general rate of duty is 13.5 percent ad valorem for HTS subheading 6905.10.00 and 3.2 percent ad valorem for HTS subheading 6905.90.00;[22] Free for HTS subheading 6913.90.20;[23] and 9.0 percent ad valorem for HTS subheading 6914.10.80 and 5.6 percent ad valorem for HTS subheading 6914.90.80.[24]

Edition, USITC Publication 4660, February 2017, Change Record, pp. 60 to 62; HTSUS (2016) Basic Edition, USITC Publication 4588, March 2016, pp. 69.5 to 69.6.

Effective January 1, 2017, the HTS subheadings were reorganized and expanded into five new primary groups of HTS subheadings 6907.21.10 to 6907.21.90 for ceramic tile with a water absorption coefficient not exceeding 5 percent by weight; HTS subheadings 6907.22.10 to 6907.22.90 for ceramic tile with a water absorption coefficient exceeding 5 percent but not 10 percent by weight; HTS subheadings 6907.23.10 to 6907.23.90 for ceramic tile with a water absorption coefficient exceeding 10 percent by weight; HTS subheadings 6907.30.10 to 6907.30.90 for ceramic mosaic cubes; and HTS subheadings 6907.40.10 to 6907.40.90 for finishing (e.g., edge, corner, etc.) ceramic tiles. Within each of these five groups are further subgroups to distinguish unglazed versus glazed ceramic tiles. Finally, within each subgroup, there are further breakouts for surface-area size ranges. HTSUS (2017) Basic Edition, USITC Publication 4660, February 2017, Change Record, pp. 60 to 62.

[20] HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, pp. 69.4 to 69.9.

[21] HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, pp. 69.4, 69.17.

[22] HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, p. 69.4.

[23] HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, p. 69.17.

[24] HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, p. 69.17.

Large-size slab tile or panel tile may be imported under HTS statistical reporting numbers 6914.10.8000 and 6914.90.8000. Petition, p. 11.

(continued...)

Effective May 10, 2019, ceramic tile originating in China, in addition to being subject to existing antidumping and countervailing duty orders,[25] is also subject to an additional 25 percent ad valorem duty under section 301 of the Trade Act of 1974, as amended.[26] Effective February 4, 2025, ceramic tile originating in China is subject to an additional 10 percent ad valorem duty under the International Emergency Economic Powers Act ("IEEPA"). Effective March 4, 2025, the IEEPA duty on ceramic tile originating in China was increased to 20 percent ad valorem.[27] Effective April 5, 2025, Ceramic tile originating in China was subject to an additional 10 percent ad valorem reciprocal duty under the IEEPA. That reciprocal duty rose to 84 percent ad valorem effective April 9, 2025, and rose again to 125 percent effective April 10, 2025. [28]

The temporary column-1 general rate of duty was 4.7 percent ad valorem (provided for in subheading HTS 9902.14.74) for certain stoneware ceramic slabs provided for in HTS subheading 6914.90.80 that were imported on or before December 31, 2020. HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, p. 99-II-130.

[25] Commerce issued antidumping and countervailing duty orders on ceramic tile originating in China, effective June 1, 2020. 85 FR 33089, June 1, 2020; 85 FR 33119, June 1, 2020.

[26] HTS subheadings 6907.21.10, 6907.21.20, 6907.21.30, 6907.21.40, 6907.21.90, 6907.22.10, 6907.22.20, 6907.22.30, 6907.22.40, 6907.22.90, 6907.23.10, 6907.23.20, 6907.23.30, 6907.23.40, 6907.23.90, 6907.30.10, 6907.30.20, 6907.30.30, 6907.30.40, 6907.30.90, 6907.40.10, 6907.40.20, 6907.40.30, 6907.40.40, 6907.40.90, 6905.10.00, 6905.90.00, 6914.10.80, and 6914.90.80 were included in the Office of the United States Trade Representative's ("USTR's") third enumeration ("Tranche 3" or "List 3") of products originating in China that became subject to an additional 10 percent ad valorem duty (Annexes A and C of 83 FR 47974, September 21, 2018), effective September 24, 2018. Escalation of this duty to 25 percent ad valorem was rescheduled from January 1, 2019 (Annex B of 83 FR 47974, September 21, 2018) to March 2, 2019 (83 FR 65198, December 19, 2018), but was subsequently postponed until further notice (84 FR 7966, March 5, 2019), and then was implemented, effective May 10, 2019 (84 FR 20459, May 9, 2019). A subsequent modification was provided for subject goods exported from China prior to May 10, 2019, not to be subject to the escalated 25 percent duty for such goods entered into the United States prior to June 1, 2019 (84 FR 21892, May 15, 2019) with the entry date subsequently being extended to prior to June 15, 2019 (84 FR 26930, June 10, 2019).

See also HTS heading 9903.88.03 and U.S. notes 20(e) and 20(f) to HTS Subchapter III of Chapter 99 and related tariff provisions for this duty treatment. Effective January 1, 2024, no exemptions have been granted for ceramic tile products originating in China. USITC, HTSUS (2024) Revision 1, USITC Publication 5491, January 2024, pp. 99-III-27 to 99-III-28, 99-III-45, 99-III-225, 99-III-231 to 99-III-241, 99-III-244, 99-III-245 to 99-III-246, 99-III-301, 99-III-303, 99-III-305 to 99-III-307, 99-III-309.

[27] 90 FR 9121, February 7, 2025; 90 FR 11463, March 7, 2025. See also HTS heading 9903.01.20 and U.S. note 2(s) and HTS heading 9903.01.24 and U.S. note 2(u) to subchapter III of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2025) 2, Publication 5590, February 2025, pp. 99.3.1, 99.3.278.

[28] The reciprocal duty is in addition to the 20 percent ad valorem duty under IEEPA that went into effect on March 4, 2025, for China. 90 FR 15041, April 7, 2025; 90 FR 15509, April 14, 2025; 90 FR 15625, (continued...)

Effective April 5, 2025, ceramic tile originating in India and all other countries was subject to an additional 10 percent ad valorem duty under IEEPA.[29] Effective April 9, 2025, India was instead assigned an individualized country reciprocal duty of 26 percent ad valorem. However, effective April 10, 2025, individualized country reciprocal duties were suspended and the reciprocal duty rate for ceramic tile originating in India was returned to 10 percent. [30]

Decisions on the tariff classification and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

The product

Description and applications

Ceramic tile is a masonry product containing hydrous silicates of alumina (and/or other metals) that is fired at high temperatures to bond together the constituent particles.[31] They are often flat, with beveled edges, and are available in various shapes, sizes, and colors.[32] Ceramic tile can currently be formed as large as 5-feet by 15-feet or more (often referred to as "slabs" or "panels") and smaller than 1-inch by 1-inch. Thicknesses can exceed 3 cm (1.2 inches) or be as thin as 2 mm (0.8 inch), with some tiles even beyond these dimensions.[33] "Paving tile" or "pavers" are flat tile used for flooring or walking surfaces.[34] "Finishing tile" are available in

April 15, 2025. See also HTS headings 9903.01.25 and 9903.01.63 and U.S. note 2(v) to subchapter III of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2025) Revision 8, Publication 5613, April 2025, pp. 99.3.1 to 99.3.10, 99.3.278.

[29] The White House, "Regulating Imports with a Reciprocal Tariff to Rectify Trade Practices that Contribute to Large and Persistent Annual United States Goods Trade Deficits," April 2, 2025, https://www.whitehouse.gov/presidential-actions/2025/04/regulating-imports-with-a-reciprocal-tariff-to-rectify-trade-practices-that-contribute-to-large-and-persistent-annual-united-states-goods-trade-deficits/.

[30] Individualized country reciprocal duties for all countries other than China were suspended until July 9, 2025. 90 FR 15041, April 7, 2025. 90 FR 15625, April 15, 2025. See also HTS headings 9903.01.25 and 9903.01.55 and U.S. note 2(v) to subchapter III of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2025) Revision 8, Publication 5613, April 2025, pp. 99.3.1 to 99.3.10, 99.3.278, 99.3.303.

[31] Petition, p. 8, exhibit I-14: "ASTM C1232−23, Standard Terminology for Masonry, December 15, 2023."

[32] Petition, p. 10.

[33] Petition, p. 11.

[34] "Flags" appears in the HTSUS article description but it is considered a synonymous but obsolete term by the ceramic tile industry for flooring and paving tile. Petition, p. 9.

various shapes— including bases, caps, corners, moldings, angles, etc.— to complete the installation of ceramic tile to meet sanitary and/or architectural design requirements.[35]

The durable and hard-wearing surface renders ceramic tile suitable for covering surfaces such as interior and exterior floors, walls, counter- and table-tops, shower stalls, and swimming pools, among numerous other applications. Ceramic tiles of all sizes are commonly used by the residential sector, especially in kitchens, bathrooms, and entrances; as well as by the commercial sector in various floor and wall applications.[36]

Floor and wall ceramic tiles

All sizes of ceramic tile may be distinguished between "floor tile" and "wall tile" based on the different physical-performance requirements for the various end-use applications. The American National Standard Institute ("ANSI") specification A137.1 provides the physical and performance criteria to distinguish floor tile from wall tile.[37] Product-performance standards may be more rigorous for (or are specifically applicable to) floor tile than wall tile, such as higher breaking strength, quality and thickness, slip resistance, and abrasion resistance.

Tile Grades for quality and thickness are based on ANSI standard 137.1:

- Grade 1 ("standard grade")— Highest quality and thickest (¾-inch) tile available, suitable for both floors and walls;
- Grade 2 ("secondary grade")— Some facial imperfections and about ½-inch thick, but still suitable for both floors and walls; and
- Grade 3 ("cull grade")— Thinnest (¼-inch) tile available, but still suitable for walls.[38]

[35] Petition, pp. 8.to.9, exhibit I-15, exhibit I-16: "ANSI A137.1—2022, American National Standard Specifications for Ceramic Tile, July 2022," July 2022, "ANSI A137.3—2022, American National Standard Specifications for Gauged Porcelain Tiles and Gauged Porcelain Tile Panels/Slabs," July 2022.

[36] Petition, p. 10, exhibit I-20, exhibit I-21.

[37] Petition, exhibit I-15: "ANSI A137.1—2022, American National Standard Specifications for Ceramic Tile, July 2022," July 2022.

[38] Petition, exhibit I-15: "ANSI A137.1—2022, American National Standard Specifications for Ceramic Tile," July 2022, Section 8.1 Grade Marking Distinguishes Various Qualities and Attributes of Ceramic Tiles, p. 22; Calcamuggio, Jeffrey, "Tile Flooring 101 – Considerations," Buildipedia, August 17, 2011, http://buildipedia.com/at-home/floors/tile-flooring-101-considerations?print=1&tmpl=component accessed March 11, 2025.; Robinson, Kristy, "How to Determine the Quality of Ceramic Floor Tiles," SFGate Home Guides, Jan 30, 2021, https://homeguides.sfgate.com/determine-quality-ceramic-floor-tiles-24866.html, accessed March 11, 2025.

Ceramic tile for flooring applications is required to meet Dynamic Coefficient of Friction ("DCOF") test requirements for slip resistance.[39]

On a scale of 0 – 1.00, the coefficient of friction ("COF") should exceed 0.50 foot-pounds for standard floor tiles and must exceed 0.60 foot-pounds for level floor tile applications and 0.8 foot-pounds for incline ramp applications to comply with Americans with Disabilities Act ("ADA") requirements.[40]

Surface abrasion-resistance (sometimes referred to as the "durability classification" or "Porcelain Enamel Institute" ("PEI") rating of glazed ceramic tile is rated in accordance with the Visible Abrasion Resistance standards of ANSI A137.1, in accordance with the testing requirements of the American Society for Testing and Materials (ASTM) standard C1027. There are six abrasion-resistance rating classes distinguish the suitability of ceramic tiles for various floor and wall applications:

- Class 0— Suitable only for light-duty wall applications;
- PEI Class I— Suitable only for residential and commercial wall applications;
- PEI Class II— Suitable for interior residential and commercial wall, and residential bathroom floor applications;
- PEI Class III— Suitable for all residential and light foot-traffic commercial floor applications;
- PEI Class VI— Suitable for all residential, medium foot-traffic commercial, and light foot-traffic institutional floor applications; and
- PEI Class V— Suitable for all residential, commercial, institutional, and industrial floors applications.[41]

[39] According to Section 6.2.2.1.10 of ANSI A137.1, ceramic tiles suitable for walking upon as level interior surfaces when wet shall have a wet DCOF of 0.42. Petition, exhibit I-15: "American National Standard Specifications for Ceramic Tile, ANSI A137.1—2022," July 2022, pp. 15 to 16.

[40] ADA Accessibility Guidelines ("ADAAG"), Section A4.5 Ground and Floor Surfaces, Appendix A4.5.1 General, September 2002. https://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/background/adaag#A4.5.1, accessed March 11, 2025; Robinson, Kristy, "How to Determine the Quality of Ceramic Floor Tiles," SFGate Home Guides, January 30, 2021, https://homeguides.sfgate.com/determine-quality-ceramic-floor-tiles-24866.html, accessed March 11, 2025.

[41] Petition, exhibit I-15: ANSI A137.1—2022, American National Standard Specifications for Ceramic Tile, August 2017, Section 6.2.3.5 Surface Wear Resistance, pp. 18 to 19; Wallender, Lee, "Understanding Ceramic Tile PEI Ratings," The Spruce, January 30, 2020, https://www.thespruce.com/pei-ratings-help-with-tile-installation-areas-1822598, accessed March 11, 2025.

Ceramic mosaic tiles

Ceramic tile can be sold as part of a combination of different ceramic tiles or other materials (e.g., stone, glass, etc.) usually set in a small format and usually set on a mesh sheet, known as mosaic tile.[42] ANSI defines mosaic tile as tile, usually ¼ inch (6.35 mm) to 3/8 inch thick (9.53 mm), and having a facial area of less than 9 inch^2 (5806 mm^2). Such tiles are typically mounted in sheets or strips with other mosaic tiles.[43]

Porcelain and non-porcelain ceramic tiles

Porcelain ceramic tile is distinguished from other ("non-porcelain") types of ceramic tile by lower porosity (water absorption) and other physical characteristics, more expensive raw materials,[44] and higher firing temperatures and longer firing periods. Moreover, porcelain tile is common for end uses requiring superior breaking strength, freeze-thaw cycle resistance, and minimum water-exposure expansion. Porcelain tile is distinguished from non-porcelain tile by its low porosity of 0.5 percent or less of water absorption. Sometimes referred to as "impervious tile," porcelain tile is considered suitable for all interior and exterior applications.[45] Various types of non-porcelain tile have higher porosities and more limited suitable applications:

- Vitreous tile (over 0.5 percent to 3 percent), suitable for outdoor and wet interior rooms (e.g., bathrooms);
- Semi-vitreous tile (over 3 percent to 7 percent), not suitable for outdoor or wet interior rooms; and

[42] Cosmo Surfaces, "What are Mosaic Tiles," December 7, 2020, https://cosmosurfaces.com/what-are-mosaic-tiles/ and Tile Bar, "What is Mosaic Tile," https://cosmosurfaces.com/what-are-mosaic-tiles/ retrieved , accessed March 11, 2025.

[43] Section 3.0 Definition of Terms of the American National Standard Specifications for Ceramic Tile, ANSI A137.1. Petition, exhibit I-15: "American National Standard Specifications for Ceramic Tile, ANSI A137.1—2022," July 2022, p. 1.

[44] The predominant raw material for producing porcelain tile is more highly refined (for higher purity), very fine-grained, white (kaolinite) clays, with significant amounts of quartz and feldspar as additional additives. Wallender, Lee, "Porcelain Tile vs. Ceramic Tile Comparison Guide," The Spruce, April 10, 2020, https://www.thespruce.com/porcelain-tile-vs-ceramic-tile-1822583, accessed March 11, 2025 .

[45] Home Depot, "Porcelain vs. Ceramic Tiles," https://www.homedepot.com/c/ab/porcelain-vs-ceramic-tiles/9ba683603be9fa5395fab9016ed2ca9d , accessed March 11, 2025 and Mission Stone & Tile, "8 Differences Between Ceramic and Porcelain Tile," https://missionstonetile.com/blogs/resources/what-is-the-difference-between-ceramic-and-porcelain-tile, accessed March 11, 2025

- Non-vitreous tile (over 7 percent) water absorption, not suitable for outdoor or wet interior rooms.[46]

Since November 2007, the Ceramic Tile Distributors Association ("CTDA") and the Tile Council of North America ("TCNA") have sponsored the Porcelain Tile Certification Agency ("PTCA") program to certify that a manufacturer's "porcelain tile" samples meet the water-porosity criteria of 0.5 percent or less.[47] Compared to non-porcelain tile, porcelain tile is generally harder to cut and harder to bond to the floor.[48]

Glazed and unglazed ceramic tile surfaces

Ceramic tile surfaces can be either glazed or unglazed. Non-porcelain tiles are usually glazed for enhanced surface durability. Glazed porcelain tile has filled micro-pores that would otherwise remain open if the tile is left unglazed. Glazing renders porcelain tile surfaces both more durable and easier to clean, but unglazed porcelain tile offer greater slip resistance. Unglazed porcelain tile can be "through body" with the surface color extending uniformly through the entire thickness of the tile. Glazed surfaces can have different colors and patterns than the body of the porcelain tile, but the glaze is usually sufficiently resistant enough to abrasion to not show surface wear.[49] There are four common forms of glazed tile surfaces:

- Gloss - with a shiny and reflective appearance;
- Matt or matte – with a non-shiny, unpolished appearance;
- Lappato – thinly glazed and polished, but not completely which gives these types of tiles a natural look that is part glossy, part matt; and

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[46] Water absorption of ceramic tile is tested in accordance with the requirements of ASTM C373 – 18: Standard Test Methods for Determination of Water Absorption and Associated Properties by Vacuum Method for Pressed Ceramic Tiles and Glass Tiles and Boil Method for Extruded Ceramic Tiles and Nontile Fired Ceramic Whiteware Products; Calcamuggio, Jeffrey, "Tile Flooring 101 – Considerations," Buildipedia, August 17, 2011, http://buildipedia.com/at-home/floors/tile-flooring-101-considerations?print=1&tmpl=component, accessed March 11, 2025

[47] International Product Assurance Laboratories, "The Porcelain Tile Certification Agency (PTCA)," https://ipalaboratories.com/lab-services/materials-testing/certified-porcelain/#:~:text=In%20November%202007%2C%20the%20Ceramic,ASTM%20C373%20test%20method%20measures, accessed March 11, 2025 and The Porcelain Tile Certification Agency (PCTA), "About PCTA" http://www.ptcaonline.org/, accessed March 11, 2025.

[48]Mission Stone & Tile, "8 Differences Between Ceramic and Porcelain Tile," https://missionstonetile.com/blogs/resources/what-is-the-difference-between-ceramic-and-porcelain-tile, accessed March 11, 2025.

[49] Old English Tiles, "The Difference Between Glazed an Unglazed Porcelain Tiles," June 14, 2018, https://www.oldeenglishtiles.com.au/blogs/news/the-difference-between-glazed-and-unglazed-porcelain-tiles and Ceramic Research Company, Articles "How to Choose and Maintain Ceramic Tiles," no date, https://www.ceramic-research.com/articles_02.html, accessed March 11, 2025.

- Textured – pressing materials into a mold that gives a textured effect (such as that of natural stone or wood) then it's glazed and fired.[50]

Polished tile

A polished ceramic tile is double fired.[51] First it is processed with the desired pattern or color and then with a clear coat. Afterwards, the tile undergoes a similar polishing process as stone which includes passing the tile under polishing wheels with water and polishing compound. Finally, it is sealed to retain its appearance.[52]

Manufacturing processes[53]

The manufacturing process for all sizes of ceramic tile consists of eight successive basic stages including: (1) raw-materials crushing, (2) mixing and milling, (3) spray drying, (4) shaping, (5) drying, (6) glazing and/or digital printing, (7) firing, and (8) post-firing operations. All ceramic tile is produced, regardless of where throughout the world, generally using the same basic raw materials despite technological variations, for each step described below.[54]

[50] Old English Tiles, "The Difference Between Glazed an Unglazed Porcelain Tiles," June 14, 2018, https://www.oldeenglishtiles.com.au/blogs/news/the-difference-between-glazed-and-unglazed-porcelain-tiles; Atlas Plan, "Lappato Porcelain Tiles," accessed March 11, 2025, https://www.atlasplan.com/en-US/news/lappato-tiles/#:~:text=The%20lappato%20meaning%20refers%20to,is%20part%20glossy%2C%20part%20matt; Mineral Tiles, "Matte," accessed March 11, 2025, https://www.mineraltiles.com/collections/matte-finish; and Greenlee, B., "Tile 101:Guide to Tile Finishes," January 21, 2020, https://www.tileshop.com/blog/guide-to-tile-finishes/#:~:text=Polished%20tiles%20are%20double%20fired,sealed%20to%20retain%20their%20appearance accessed March 11, 2025.

[51] Double-fired ceramic tiles are made by first firing the raw tile, and then firing it again after glazing. Herberia Ceramich, "Porecelain Stoneware and Double Firing Tiles," https://www.herberiaceramiche.it/en/porcelain-stoneware/#:~:text=Double%2Dfired%20ceramic%20tiles%20are%20made%20by%20first%20firing%20the,effect%20of%20outstanding%20aesthetic%20value accessed March 11, 2025.

[52] Greenlee, B., "Tile 101:Guide to Tile Finishes," January 21, 2020, https://www.tileshop.com/blog/guide-to-tile-finishes/#:~:text=Polished%20tiles%20are%20double%20fired,sealed%20to%20retain%20their%20appearance, accessed March 11, 2025.

[53] Unless specified otherwise, information in this section is compiled from Petition, pp. 10 to 12.

[54] Petition, p. 10 and hearing transcript, p. 22 (Haynes).

Raw-materials crushing

The raw materials for all sizes of ceramic tile determine its properties. While ball clay and kaolin clay are common to all types of ceramic tile,[55] the amount and type of clay varies. The color of the ceramic tile body is determined in part by the amount of the iron-containing raw materials, with a higher iron content resulting in a red ceramic body in contrast to a low (or absence) of iron content resulting in a whitish ceramic body.[56] Other minerals are added to impart specific properties, depending on the type of tile, forming process, and firing process:

- Silica (quartz) sand— added-in as a cost-effective filler material;
- Alkali-containing feldspar— lowers the melting temperature, enhances low melt viscosity, and allows for controlled sintering at high temperatures;
- Nepheline syenite— a source of alkalis;
- Talc— an "auxiliary flux" that controls size and promotes low and consistent shrinkage; and
- Biotite— an accessory mineral contained in granite, which is a source of silica and feldspar, but otherwise does not provide a specific function.[57]

The clays and other raw materials are pulverized down to suitable grain sizes for the subsequent mixing and milling operations.

Mixing and milling

The raw materials are mixed together and milled, either dry or wet, depending on the fanning process. The wet-mixing method is more common, in large mills that further reduce the particle size in preparation for spray-drying. Wet mixing can also be done for extrusion forming, wet-pressing, and slip-casting. Dry milling can be done where the subsequent forming operation does rely on spray-dried particles.

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[55] Ball clay and kaolin clays also provide material strength in the unfired state, enhances pyroplasticity (stability) while firing, and maintains a steady sintering temperature in the kiln. Zillion Sawa Minerals, "What is Ball Clay and How is it Used and Applied in Different Industries Like Ceramic?," June 1, 2023, https://medium.com/@zillionsawaminerals/what-is-ball-clay-and-how-is-it-used-and-applied-in-different-industries-like-ceramic-c06bf6f89d10, accessed March 11, 2025.

[56] Clay composition is determined by the ratio of silica to other minerals, such as quartz, carbonates, aluminum oxides, and iron oxides. Red clays form from continued weathering which leaches out minerals containing sodium, potassium, calcium, and carbonates, but the more chemically stable iron and aluminum oxides are less likely to leach out. Red clay-rich soils are found mostly in humid temperate and tropical regions of the world. Blue, Marie-Louise, "What Is Red Clay?" Sciencing.com, https://sciencing.com/red-clay-22940.html, accessed March 11, 2025.

[57] Ceramic Research Company, Articles "Roles and Functions of Ceramic Raw Materials in the Ceramic Tile Body," undated, https://www.ceramic-research.com/articles_02.html, accessed March 11, 2025.

Spray drying

To obtain consistent particles for a high degree of quality control, the wet-milled mixture (slurry) is sprayed into a vertical tower with rising warm air. The high degree of process control results in a generally homogenous powder containing just enough moisture for the subsequent pressing (shaping) process.

Shaping

Tiles can be formed by various processes, depending on whether the material being formed is either wet or dry. The most common method is dry-pressing[58] of the ground particles by compression between dies, rollers, belts, or other means.[59] In some instances, various powders are combined to create surface effects when pressed together.[60] Wet clay can be formed by continuous extruding and cutting to size (including larger sizes)[61], pressing into a die, or pouring into a mold.

Drying

After being formed, the newly formed ("green") tiles are dried, usually in large dryers or low-temperature kilns. Drying can be either continuous or batch operations, being commonly

[58] In dry-pressing, the particles are not actually fully dry, but rather contain just enough moisture to hold together after pressing.

[59] Petitioners note that presses range from 3,000 to 7,500 pounds. Hearing transcript, p. 21 (Haynes).

[60] These include wood or stone looks. Hearing transcript, p. 21 (Haynes).

[61] Although the manufacturing process for slabs (also referred to as panels) is similar to that of smaller sized tile, the equipment that produce the ceramic slabs may be different as it is produced on continuous production line. Some production lines can produce both tiles and slabs. For example, CONTINUA+: Compaction technology can produce slabs and tiles without any size or mold limits. Sacmi, "Continua+ Compaction Technology for Slabs and Tiles," https://www.sacmi.com/en-US/ceramics/Tiles/Continua accessed March 11, 2025. Ceramic slabs are produced in larger dimensions and thickness than ceramic tiles. Common ceramic slabs sizes typically range from 1200 mm X 1200 mm to 1600 mm X 3200 mm while ceramic tile sizes are 600 mm X 600 mm, 800 mm X 800 mm, and 800 mm X 1600 mm. Slabs are used for kitchen tops, countertops, furniture & wall claddings. Comet's postconference brief, pp. 1 to 4; It is also suitable to be used in novel applications: building and construction (new floorings without dismantling the previous paving, ventilated façades, tunnel coverings, insulating paneling), indoor furniture (tabletops, doors), support for photovoltaic ceramic panels. Raimondo, M. et al, "Processing and properties of large-sized ceramic slabs," Institute of Science and Technology for Ceramics, Vol. 49, 4, 289-296 (2010), https://www.researchgate.net/publication/50284952_Processing_and_properties_of_large-sized_ceramic_slabs/fulltext/0e60c806f0c493afa4b70f1d/Processing-and-properties-of-large-sized-ceramic-slabs.pdf, retrieved March 11, 2025.

fueled by natural gas, fuel oil, or coal, although infrared, microwave, or even excess heat from other operations are sometimes used.

Glazing and/or digital printing

The surface of the green tile can be decorated before firing by applying materials that bond with the surface when fired. There are various techniques to apply glazing materials from a simple waterfall coating the surface to spray applications, and now digital printing with glaze-like compounds. Surface decoration can also be applied prior to forming by adding dry powders that impart the decorative effects to the surface upon firing. Surfaces of fired tile also can be decorated before a secondary firing operation.

Firing

Conversion from a clay-containing mixture to a ceramic material through firing creates the properties associated with ceramic tile.[62] The time and temperature for firing the green tile depends on the raw-material composition and determines the finished properties. Heating and cooling are controlled to allow the various physical changes to take place. In the case of porcelain tiles, firing is sufficiently hot (typically, but not exclusively, between 2,100°F to 2,200°F) to drive-down the finished porosity (water absorption) from 6 to 8 percent down to 0.5 percent or less.[63] Firing can be accomplished in a single operation with the green tile and surface decoration fired together (i.e., "single-fired" or "monocottura") in a roller-hearth kiln or in two or more subsequent firing operations depending on the pre-firing processes and desired decoration effects.[64] Depending on the firing process and raw materials used, the total time for firing and cooling can be under an hour or even requiring multiple days.[65]

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[62] While the crystallinity of the clay-containing mixture changes through the firing process, crystallinity itself is not a determinant of whether a material is ceramic.

[63] Petition, p. 12.

[64] The shaping, glazing, and single-firing steps combined can require as little as an hour to complete. Because the single-firing process results in stronger and more-durable ceramic tile with a harder glazed surface that is less prone to peeling and cracking, monocottura tiles are suitable for interior floor tiles and outdoor applications. Build.com, "Moncottura vs. Bicottura Tiles, What's the Difference?" http://www.build.com.au/monocottura-vs-bicottura-tiles-whats-difference, accessed March 11, 2025,.

[65] The older, double-firing ("bicottura") process— consisting of shaping and initial firing of unglazed tile, glazing, and second firing of glazed tile— can require several days to complete. Generally being softer than single-fired tile, double-fired tile is suitable for walls and back-splashes. Moreover, the protrusions (or "lugs") often present on the back surface render bicottura tile less suitable for covering horizontal flooring surfaces. *Ibid*.

Post-firing operations

Cooled ceramic tile undergoes various post-firing operations prior to shipment.[66] Polished tiles are treated with abrasives in a polishing line to create a fine polish on the surface.[67] Rectified tiles are trimmed on a cutting line to produce precisely sized tiles. Cutting may occur at the factory or offsite at another facility to produce more modular products. Very large-size tiles (referred to as "slabs" or "panels") up to 5-feet by 15-feet or even larger can be cut at the factory but are also commonly shipped as-produced in such large sizes for subsequent cutting in a separate facility or even at a job site. Ceramic tile is shipped in cartons for retail sale, e.g., at "big-box" home-improvement stores. Carton labels include symbols and rating information about the ceramic tile contained within, including its grade, PEI rating, water absorption, DCOF, frost-resistance, and shade variations.[68]

Domestic like product issues

In the preliminary phase of these investigations, the Commission defined a single domestic like product, coextensive with the scope.[69] In the final phase of these investigations, no parties requested data or other information necessary for the analysis of the domestic like product. Petitioners propose that the domestic like product be defined as ceramic tile, coextensive with Commerce's scope.[70] Respondent M S International does not take a position on the domestic like product.[71]

[66] Tiles that are unsuitable for shipment are recycled into the body which helps to reduce cost. Preliminary conference transcript, p. 64 (Durbin), and Domestic respondent joint postconference brief exhibit 1, p. 2.

[67] Polishing line can be part of a continuous line or a separate line. Conference transcript, p.138 (Bedrosian).

[68] See, e.g.: The Home Depot, "Ceramic Tiles – Label Information," no date, https://www.homedepot.com/hdus/en_US/DTCCOM/Home_Services/Tile_Flooring/Tile_Flooring_Buying_Guide/Docs/ceramic_tile_label_info.pdf (retrieved March 11, 2025,).

[69] Ceramic Tile from India, (Final), USITC Publication 5515, June 2024 ("Preliminary publication"), p. 14.

[70] Petitioners' prehearing brief p 6.

[71] Respondent M S International's prehearing brief, p. 3.

Part 2: Conditions of competition in the U.S. market

U.S. market characteristics

Ceramic tile is used as a decorative covering on floors and walls, mostly in kitchens and bathrooms, as well as commercial spaces. U.S. demand for ceramic tile is driven primarily by demand in the construction sector, both for new homes and for remodeling/removing and replacement ("R&R"). Like in the construction industry, demand for ceramic tile is seasonal, with peaks in the spring and fall, and valleys in the winter.[1] There are several substitutes reported for ceramic tile, particularly in flooring applications, including luxury vinyl tile ("LVT"), carpet, wood (typically hardwood), and stone. Some importers cited LVT as having taken market share from ceramic tile in recent years, due to its comparatively lower price and ease of installation.[2]

Eight of 10 U.S. producers, 8 of 18 importers, and 4 of 11 purchasers indicated that the market was subject to distinctive conditions of competition. Several U.S. producers reported that an increased number of lower priced imports, namely from India, have been entering the market. U.S. producer *** reported that imports from India of polished ceramic tiles had resulted in U.S. producers losing large quantities of sales in the home center market. U.S. producer *** reported that a strong U.S. dollar has made imports relatively cheaper than U.S. produced product in the U.S. market which has increased the competitiveness of imported ceramic tile which is sensitive to price. U.S. producer *** reported that price is a major marketing factor as is design and quality of ceramic tiles.

Importer *** reported there are a number of distinct conditions of competition in the U.S. ceramic tile industry ranging from the increased number of substitute products, labor shortages for installing ceramic tile, and a consolidation of retailers who sell ceramic tile. Importer and purchaser *** reported that substitutes like vinyl and laminate flooring options have added more competition in the ceramic tile market. Importer *** reported that there has been an extreme surge of imports from India over the period of investigation. Importer ***[3] reported that price competition from similar retailers can cause price spikes and dips in the market.

[1] Conference transcript, p. 120 (Shah).

[2] Petitioner stated that LVT has been taking market share from other flooring types such as laminate, wood, and carpeting, rather than ceramic tile. Petitioner's postconference brief, pp. 13 to 14 and petitioners' posthearing brief, pp. 10 to 11.

[3] *** reported that *** is its parent company.

Purchaser *** reported that importers selling directly to consumers is a distinct condition of the ceramic tile market. Purchaser *** reported that supply chain disruptions caused by COVID-19 changed the landscape for regional distributors leading to consolidation within the industry. Purchaser *** reported that LVP has taken market share from other types of flooring including tile.

Apparent U.S. consumption of ceramic tile decreased in terms of quantity but increased in terms of value during January 2021 to December 2023. Apparent U.S. consumption of ceramic tiles decreased in terms of quantity and value in the interim of 2024 compared to the same period of 2023.

U.S. purchasers

The Commission received 11 usable questionnaire responses from firms that had purchased ceramic tile during January 2021 to September 2024.[4] [5] [6] Three responding purchasers are big box retailers, three are contractors/builders, two are distributors/wholesalers, one is a contractor/builder and distributor/wholesaler, one is a retailor and distributor/wholesaler, and one is a retailor, contractors/builders, and distributor/wholesaler.

Channels of distribution

U.S. producers sold mainly to distributors, big box stores, and contractors; while importers sold mainly to big box stores, as shown in table 2.1.

[4] The following firms provided purchaser questionnaire responses: ***.

[5] Of the 11 responding purchasers, 10 purchased domestic ceramic tile, seven purchased imports of the subject merchandise from India, and 10 purchased imports of ceramic tile from other sources, including Brazil, Italy, Mexico, and Spain.

[6] Eleven purchasers indicated they had marketing/pricing knowledge of domestic product, six of Indian product, and nine of nonsubject countries, including Brazil, Italy, Mexico, and Spain.

Table 2.1 Ceramic tile: Share of U.S. shipments by source, channel of distribution, and period

Shares in percent; interim is January to September

Source	Channel	2021	2022	2023	Interim 2023	Interim 2024
United States	Distributors	***	***	***	***	***
United States	Big box	***	***	***	***	***
United States	Other retailers	***	***	***	***	***
United States	Contractors	***	***	***	***	***
United States	Other end users	***	***	***	***	***
India	Distributors	***	***	***	***	***
India	Big box	***	***	***	***	***
India	Other retailers	***	***	***	***	***
India	Contractors	***	***	***	***	***
India	Other end users	***	***	***	***	***
Nonsubject	Distributors	***	***	***	***	***
Nonsubject	Big box	***	***	***	***	***
Nonsubject	Other retailers	***	***	***	***	***
Nonsubject	Contractors	***	***	***	***	***
Nonsubject	Other end users	***	***	***	***	***
All imports	Distributors	***	***	***	***	***
All imports	Big box	***	***	***	***	***
All imports	Other retailers	***	***	***	***	***
All imports	Contractors	***	***	***	***	***
All imports	Other end users	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Geographic distribution

U.S. producers and importers reported selling ceramic tile to all regions of United States (table 2.2). For U.S. producers, *** percent of sales were within 100 miles of their production facility, *** percent were between 101 and 1,000 miles, and *** percent were over 1,000 miles. Importers sold *** percent within 100 miles of their U.S. point of shipment, *** percent between 101 and 1,000 miles, and *** percent over 1,000 miles.

Table 2.2 Ceramic tile: Count of U.S. producers' and U.S. importers' geographic markets

Region	U.S. producers	India
Northeast	10	7
Midwest	10	8
Southeast	10	9
Central Southwest	10	7
Mountain	10	6
Pacific Coast	10	6
Other	8	6
All regions (except Other)	10	6
Reporting firms	10	11

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Other U.S. markets include AK, HI, PR, and VI.

Supply and demand considerations

U.S. supply

Table 2.3 provides a summary of the supply factors regarding ceramic tile from U.S. producers and from India.

Table 2.3 Ceramic tile: Supply factors that affect the ability to increase shipments to the U.S. market, by country

Quantity in 1,000 square feet; ratio and share in percent

Factor	Measure	United States	India
Capacity 2021	Quantity	1,003,486	736,686
Capacity 2023	Quantity	1,054,254	879,763
Capacity utilization 2021	Ratio	88.8	80.7
Capacity utilization 2023	Ratio	82.4	86.5
Inventories to total shipments 2021	Ratio	34.6	11.0
Inventories to total shipments 2023	Ratio	39.5	11.4
Home market shipments 2023	Share	98.2	77.1
Non-US export market shipments 2023	Share	1.8	10.0
Ability to shift production (firms reporting "yes")	Count	0 of 10	1 of 17

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Responding U.S. producers accounted for the vast majority of U.S. production of ceramic tile in 2023. Responding foreign producer/exporter firms accounted for more than half of U.S. imports of ceramic tile from India during 2023. For additional data on the number of responding firms and their share of U.S. production and of U.S. imports from each subject country, please refer to Part 1, "Summary Data and Data Sources."

Domestic production

Based on the available information, U.S. producers of ceramic tile have the ability to respond to changes in demand with moderate changes in the quantity of shipments of U.S.-produced ceramic tile to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the availability of unused capacity and inventories. Factors mitigating the responsiveness of supply include the limited ability to shift shipments from alternate markets and no reported ability to shift production to or from alternate products.

U.S. producers' production decreased from 2021 to 2023, as production capacity rose, causing capacity utilization to decrease slightly. U.S. producers' inventories as a share of total shipments increased slightly from 2021 to 2023 but remained just above *** of commercial shipments throughout the period. U.S. producers' export shipments accounted for a small share of total shipments, less than *** percent throughout the period. None of the responding U.S. producers reported being able to shift production to or from other products.

Subject imports from India

Based on the available information, producers of ceramic tile from India have the ability to respond to changes in demand with moderate-to-large changes in the quantity of shipments of ceramic tile to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the availability of unused capacity and some inventories, and some ability to shift shipments from alternate markets. Factors mitigating the responsiveness of supply include limited ability to shift production to or from alternate products.

Indian producers' capacity and production increased from 2021 to 2023 leading to an increase in capacity utilization. Indian producers' inventories remained largely constant throughout the period at just over *** of commercial shipments. Indian producers reported selling the vast majority of ceramic tiles to markets other than the United States. *** reported being able to shift production to or from other products but did not report what other products it could produce or shift production from.

Imports from nonsubject sources

Nonsubject imports accounted for 89.9 percent of total U.S. imports in terms of value in 2023. The largest sources of nonsubject imports in 2023 were Italy and Spain. Combined, these countries accounted for 60.0 percent of nonsubject imports in 2023.

Supply constraints

The majority of responding U.S. producers (9 of 10), importers (15 of 18), and purchasers (8 of 11) reported that they had not experienced supply constraints since January 1, 2021.

The sole U.S. producer, (***), that reported supply constraints reported that it had experienced supply constraints in 2021 as a result of a COVID-19 related demand surge which coincided with the closure of a competing producer's production facilities. These two events caused shipping delays and extended lead times.

All three importers who reported supply constraints reported that they had experienced them in 2021. Importers *** reported that these supply constraints were due to logistical constraints while importer *** reported that labor shortages led to supply chain disruptions in addition to logistical constraints. Importers *** reported that supply constraints persisted throughout the rest of the period of investigation, while importer *** reported that supply constraints ended in 2021.

Purchaser *** reported supply constraints for domestic and imported ceramic tile in every period of the investigation. Purchaser *** reported that Anatolia, Milestone USA, and Portobello USA were oversold throughout the period and small import suppliers would shut down production. Purchaser *** reported supply constraints in 2021 and 2022 due to the impact of COVID-19 on supply chains. Purchaser *** reported supply constraints for ceramic tile from domestically produced and imported sources throughout the period of investigation but specified constraints in 2022 for ceramic tile from Lamosa Mexico due to constrained kiln capacity and Stone Access in India due to cash flow issues from 2023 onwards.

Table 2.4 Ceramic tile: Count of firms' responses regarding timing of supply constraints, by firm type and source

Firm type	Source	2021	2022	2023	2024: Pre-petition	2024: Post-petition
U.S. producers	Domestic	1	0	0	0	0
Importers	Imported	3	2	2	2	2
Purchasers	Domestic	2	2	1	1	1
Purchasers	Imported	2	3	2	2	2
Purchasers	Any	2	3	2	2	2

Source: Compiled from data submitted in response to Commission questionnaires.

New suppliers

Five of 11 purchasers indicated that new suppliers entered the U.S. market since January 1, 2021. Purchasers reported that the firm Portobello entered the U.S. market as a U.S. producer where it had previously only imported goods. Purchaser *** reported that the number and size of factories has increased all over the globe.

U.S. demand

Based on available information, the overall demand for ceramic tile is likely to experience moderate changes in response to changes in price. The main contributing factor to demand responsiveness is the availability of lower-cost substitute products (including LVT), tempered by the small-to-moderate share of the final cost of a project accounted for by the ceramic tile itself compared to the cost of installation.

End uses and cost share

The primary end uses for ceramic tile are flooring and wall covering in kitchens and bathrooms. Responding firms reported that ceramic tile can account for a wide range of the total installed cost of flooring or wall coverings (ranging from 10 to 100 percent).

Business cycles

Nine of 10 U.S. producers, 10 of 18 importers, and 8 of 11 purchasers indicated that the market was subject to business cycles. Specifically, U.S. producers, importers, and purchasers reported that demand for ceramic tile is primarily driven by the construction industry which has a seasonal business cycle. U.S. producers and importers specifically reported that demand for ceramic tiles slows in the winter and increases between the spring and early fall. U.S. producer *** reported that school projects that require ceramic tile are based on school schedules where summer holidays are the ideal time for renovations or repairs. U.S. producer *** reported that the ceramic tile market expanded in 2021 and 2022 but had contracted slightly in 2023. Purchasers further indicated that economic conditions and interest rates impact the construction sector and therefore the market for ceramic tile. Purchaser *** reported that Lunar New Year shutdowns in Japan and Christmas Holiday shutdowns in Italy impact the market for ceramic tiles.

Demand trends

The majority of U.S. producers reported that U.S. and foreign demand for ceramic tile fluctuated down or steadily decreased since January 1, 2021 (table 2.5). Importer responses on changes in U.S. and foreign demand since January 1, 2021 were mixed. The majority of purchasers reported that U.S. demand fluctuated down or steadily decreased while purchaser responses on the foreign demand for ceramic tiles and end use products that use ceramic tiles were mixed. U.S. producers and imports generally reported that U.S. and foreign demand had increased in 2021 and 2022 but decreased in 2023 due to decreased demand in the construction sector and high interest rates. Importer *** reported an increase in U.S. and foreign demand for ceramic tiles due to inkjet printing producing convincing images on ceramic tiles. Importer *** reported that U.S. demand had decreased due to increasing use of LVT and other products with low installation costs but that foreign demand had increased due to global population and economic growth. Importer *** reported that growth in the real estate sector increased demand for ceramic tiles. Importer *** reported that there has been increases due to a market shift away from carpet and other resilient floor types. Purchaser *** reported that that ceramic tile is the most environmentally friendly, durable, and has the most waterproof finish of any product on the market. Purchaser *** reported that LVT is taking up a larger portion of the U.S. market and that international demand had increased during 2022 and 2023 due to governments in Europe passing laws that incentivized new construction and the renovation of older properties.

Table 2.5 Ceramic tile: Count of firms' responses regarding overall domestic and foreign demand, by firm type

Market	Firm type	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease
Domestic demand	U.S. producers	2	2	0	6	0
Domestic demand	Importers	6	2	2	5	3
Domestic demand	Purchasers	1	2	0	4	3
Foreign demand	U.S. producers	0	2	0	4	1
Foreign demand	Importers	3	1	3	1	4
Foreign demand	Purchasers	2	1	1	2	0
Demand for end use products	Purchasers	0	1	0	1	0

Source: Compiled from data submitted in response to Commission questionnaires.

Substitute products

The majority of U.S. producers (7 of 10) and importers (10 of 17) reported that there are no substitutes for ceramic tile. The majority of purchasers (7 of 11) reported that there are substitutes for ceramic tile. Those U.S. producers, importers, and purchasers who reported that there were substitutes for ceramic tile reported that wood, vinyl, marble, and carpet are substitutes for flooring; and paint, wallpaper, and paneling are substituted when used to construct or finished walls. Purchasers reported that fiberglass inserts and acrylic shower surrounds can be substituted for ceramic tiles when used in bathroom showers. U.S. producer *** reported that any flooring product could be an alternative to ceramic tile as long as the consumer accepts a different look and lower performance. Importer *** reported that LVT has become a substitute for ceramic tile because of reduced prices, improved technology enabling a rigid core, and a click lock installation which reduces the price of installation. Purchaser *** reported that plastic flooring has been accepted as a price sensitive alternate to ceramic tile. Purchaser *** reported LVT is a lower cost option than porcelain and ceramic in terms of both material costs and labor costs. Purchasers *** reported that the presence of LVP in the market has possibly suppressed the prices of ceramic tile.

Substitutability issues

This section assesses the degree to which U.S.-produced ceramic tile and imports of ceramic tile from subject countries can be substituted for one another by examining the importance of certain purchasing factors and the comparability of ceramic tile from domestic and imported sources based on those factors. Based on available data, staff believes that there is a moderate-to-high degree of substitutability between domestically produced ceramic tile and ceramic tile imported from India.[7] [8] Factors contributing to this level of substitutability include similar availability, lead times for ceramic tile from inventory, moderate preferences for particular country of origin or producers, and limited significant factors other than price.

[7] The degree of substitution between domestic and imported ceramic tile depends upon the extent of product differentiation between the domestic and imported products and reflects how easily purchasers can switch from domestically produced ceramic tile to the ceramic tile imported from subject countries (or vice versa) when prices change. The degree of substitution may include such factors as quality differences (e.g., grade standards, defect rates, etc.), and differences in sales conditions (e.g., lead times between order and delivery dates, reliability of supply, product services, etc.).

[8] Petitioners believe that there is a high degree of substitutability between domestically produced ceramic tile and ceramic tile imported from India. Petitioners' posthearing brief, Exh. A, p. 8.

Factors limiting this level of substitutability are some reported differences in quality between U.S. and Indian ceramic tile, and differences in availability of some sizes and finishes from producers in different countries.

Factors affecting purchasing decisions

Purchaser decisions based on source

As shown in table 2.6, the majority of purchasers and their customers sometimes or never make purchasing decisions based on the producer or country of origin. Of the purchasers that reported that they always make decisions based on the manufacturer, purchaser *** reported that it purchases from specific producers primarily based on the quality, types of tiles (i.e. large format, different finishes, certain production techniques), and production capacity. Purchaser *** reported that history of service, consistent quality, and current economic situation are reasons that it always purchases based on the producer. Purchaser *** also reported that Italy has the highest quality product at fair price, while Spain dominates the wall tile market, and Southeast Asian countries help target the commodity products where quality is less of a concern but price and quantity are. Purchaser *** reported that it preferred to purchase ceramic tile produced in the United States because logistics were easier.

Table 2.6 Ceramic tile: Count of purchasers' responses regarding frequency of purchasing decisions based on producer and country of origin

Firm making decision	Decision based on	Always	Usually	Sometimes	Never
Purchaser	Producer	4	0	2	4
Customer	Producer	0	0	5	3
Purchaser	Country	3	1	2	4
Customer	Country	0	0	6	2

Source: Compiled from data submitted in response to Commission questionnaires.

Importance of purchasing domestic product

All responding purchasers reported that most or all of their purchases did not require purchasing U.S.-produced product.

Most important purchase factors

The most often cited top three factors firms consider in their purchasing decisions for ceramic tiles were price/cost (8 firms), quality (7 firms), and availability/supply (5 firms) as shown in table 2.7. Quality was the most frequently cited first-most important factor (cited by 3 firms), followed by price (1 firm); quality and availability/supply were the most frequently

reported second-most important factors (3 firms each); and price/cost was the most frequently reported third-most important factor (6 firms).

Table 2.7 Ceramic tile: Count of ranking of factors used in purchasing decisions as reported by purchasers, by factor

Factor	First	Second	Third	Total
Price / Cost	1	1	6	8
Quality	3	3	1	7
Availability / Supply	0	3	2	5
All other factors	7	3	1	NA

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Other factors include traditional suppliers, specifications, client preferences, trend, range of product line, ethics, ease of doing business, service, and credit terms.

The majority of purchasers (6 of 11) reported that they only sometimes purchase the lowest-priced product.

Importance of specified purchase factors

Purchasers were asked to rate the importance of 20 factors in their purchasing decisions (table 2.8). The factors rated as very important by more than half of responding purchasers were availability, product consistency, reliability of supply (10 firms each), price and quality meets industry standards (9 firms each), delivery terms and delivery time (8 firms each), innovative/trend-forward designs, payment terms, product range (7 firms each), and availability of matte tile, availability of rectified tile and minimum quantity requirements (6 firms each).

Table 2.8 Ceramic tile: Count of purchasers' responses regarding importance of purchase factors, by factor

Factor	Very important	Somewhat important	Not important
Availability	10	0	1
Availability of polished tile	4	3	4
Availability of matte tile	6	2	3
Availability of rectified tile	6	3	2
Delivery terms	8	2	1
Delivery time	8	2	1
Discounts offered	4	3	4
Innovative/trend-forward designs	7	2	2
Known or trusted brands	5	4	2
Minimum quantity requirements	6	3	2
Packaging	5	3	3
Payment terms	7	2	2
Price	9	1	1
Product consistency	10	0	1
Product range	7	2	1
Quality meets industry standards	9	1	1
Quality exceeds industry standards	4	6	1
Reliability of supply	10	0	1
Technical support/service	5	5	1
U.S. transportation costs	4	4	2

Source: Compiled from data submitted in response to Commission questionnaires.

Lead times

Ceramic tiles are primarily sold from inventory. U.S. producers reported that 91.0 percent of their commercial shipments came from inventories, with lead times averaging 10 days. The remaining 9.0 percent of their commercial shipments were produced-to-order, with lead times averaging 47 days. Importers reported that 95.4 percent of their commercial shipments came from U.S. inventories, with lead times averaging 7 days. The remaining 4.6 percent of their commercial shipments were produced-to-order, with lead times averaging 60 days.

Supplier certification

A plurality of responding purchasers (5 of 11) require their suppliers to become certified or qualified to sell ceramic tile to their firm. Purchasers reported that the time to qualify a new supplier ranged from 30 to 120 days. Purchasers generally reported that the process of certification requires firms to confirm the quality, price, designs, a suppliers production capacity, and that ceramic tiles are sourced sustainably and ethically. Only one purchaser *** reported that any domestic or foreign producer failed in its attempt to qualify ceramic tiles or had lost its approved status since January 1, 2021. It reported that the firm had failed to improve issues identified by 3rd party audits, product testing, and quality tests.

Minimum quality specifications

As can be seen from table 2.9, the majority of responding purchasers reported that domestically produced product always or usually met minimum quality specifications.

Of those purchasers who reported having knowledge of ceramic tile from foreign countries, the majority reported that ceramic tiles from India usually met minimum quality specifications while the majority of purchasers reported that ceramic tile from nonsubject countries always or usually met minimum quality specifications.

Table 2.9 Ceramic tile: Count of purchasers' responses regarding suppliers' ability to meet minimum quality specifications, by source

Source of purchases	Always	Usually	Sometimes	Rarely or never	Don't Know
United States	3	6	1	0	1
India	0	5	0	1	5
Brazil	1	5	2	0	3
Italy	7	3	0	0	1
Mexico	0	5	0	0	5
Spain	5	3	0	0	3
All other sources	1	2	0	0	2

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Purchasers were asked how often domestically produced or imported ceramic tile meets minimum quality specifications for their own or their customers' uses.

Nine responding purchasers reported factors that determined quality were related to the appearance of the tile. Purchasers generally reported that finish, color, clarity, thickness, size control and consistency, and polish were factors that impacted the appearance of ceramic tile. Purchaser *** reported that ANSI standards determine quality, while purchaser *** reported that the Council of North America ("TCNA") testing standards determined quality.

Changes in purchasing patterns

Five purchasers reported that they had changed suppliers since January 1, 2021; while six reported that they had not. Specifically, firms dropped or reduced purchases because producers stop making a product or it became difficult to purchase from them. Firms added producers in an effort to diversify their supply chain and increase their design options. Purchaser *** reported that it changes suppliers due to product reviews to determine the best products and suppliers in the world. Purchaser *** reported that it changed suppliers based on the products offered and differences in price.

Purchasers were also asked about changes in their purchasing patterns from different countries since January 1, 2021 (table 2.10). Purchaser responses on changes in purchasing patterns of ceramic tile produced in the United States and nonsubject countries were mixed. The majority of purchasers reported purchases of ceramic tile produced in India fluctuated up. Purchasers reported that changes in purchasing patterns were due to domestic manufacturing constraints, changes in consumer demand, decreases in business, and increased freight costs.

Table 2.10 Ceramic tile: Count of purchasers' responses regarding changes in purchase patterns from U.S., subject, and nonsubject countries

Source of purchases	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease	Did not purchase
United States	2	2	2	2	2	0
India	0	5	1	0	0	4
Brazil	1	2	0	2	2	3
Italy	1	4	1	2	2	0
Mexico	0	0	2	1	2	5
Spain	1	2	3	1	1	2
All other sources	2	4	1	1	2	0
Sources unknown	0	1	2	1	1	5

Source: Compiled from data submitted in response to Commission questionnaires.

Purchase factor comparisons of domestic products, subject imports, and nonsubject imports

Purchasers were asked a number of questions comparing ceramic tile produced in the United States, India, and nonsubject countries. First, purchasers were asked for a country-by-country comparison on the same 20 factors (table 2.11) for which they were asked to rate the importance.

Purchasers reported mixed responses when comparing the factors of ceramic tile from the United States and India. At least half of purchasers reported that U.S.-produced ceramic tile was superior to ceramic tile from India in terms of availability, delivery time, known or trusted brands, quality meets industry standards, quality exceeds industry standards, reliability of supply, technical support/service, and U.S. transportation costs. The majority of purchasers reported that U.S.-produced ceramic tile was inferior to ceramic tile from India in terms of availability of polished tile and price. The majority of purchasers reported that ceramic tile from India and the United States were comparable on the remaining 10 factors.

Most purchasers reported that U.S.-produced ceramic tile and ceramic tile imported from nonsubject countries were comparable on most factors. At least half of purchasers reported that U.S.-produced ceramic tile was superior in terms of delivery time, technical support/service, and U.S. transportation costs. Purchaser responses were mixed when comparing U.S.-produced ceramic tile to ceramic tile from nonsubject countries with respect to

payment terms. The majority of purchasers reported that U.S.-produced ceramic tile was inferior to ceramic tile from nonsubject countries in terms of the availability of polished tile. Purchaser responses comparing ceramic tile imported from India and nonsubject countries were mixed.

Table 2.11 Ceramic tile: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. vs India	4	2	2
Availability of polished tile	U.S. vs India	0	2	6
Availability of matte tile	U.S. vs India	0	7	1
Availability of rectified tile	U.S. vs India	0	5	3
Delivery terms	U.S. vs India	3	3	2
Delivery time	U.S. vs India	6	2	0
Discounts offered	U.S. vs India	1	4	2
Innovative/trend-forward designs	U.S. vs India	0	7	0
Known or trusted brands	U.S. vs India	5	2	0
Minimum quantity requirements	U.S. vs India	2	4	1
Packaging	U.S. vs India	2	5	0
Payment terms	U.S. vs India	2	3	3
Price	U.S. vs India	0	3	5
Product consistency	U.S. vs India	3	5	0
Product range	U.S. vs India	2	4	2
Quality meets industry standards	U.S. vs India	4	4	0
Quality exceeds industry standards	U.S. vs India	4	4	0
Reliability of supply	U.S. vs India	4	4	0
Technical support/service	U.S. vs India	4	3	0
U.S. transportation costs	U.S. vs India	4	2	1

Table continued.

Table 2.11 (Continued) Ceramic tile: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. v. Nonsubject	1	7	2
Availability of polished tile	U.S. v. Nonsubject	0	4	6
Availability of matte tile	U.S. v. Nonsubject	0	9	1
Availability of rectified tile	U.S. v. Nonsubject	0	7	3
Delivery terms	U.S. v. Nonsubject	4	5	1
Delivery time	U.S. v. Nonsubject	7	3	0
Discounts offered	U.S. v. Nonsubject	2	7	0
Innovative/trend-forward designs	U.S. v. Nonsubject	0	5	4
Known or trusted brands	U.S. v. Nonsubject	2	6	1
Minimum quantity requirements	U.S. v. Nonsubject	2	8	0
Packaging	U.S. v. Nonsubject	0	9	0
Payment terms	U.S. v. Nonsubject	2	4	4
Price	U.S. v. Nonsubject	0	7	3
Product consistency	U.S. v. Nonsubject	0	9	1
Product range	U.S. v. Nonsubject	1	6	3
Quality meets industry standards	U.S. v. Nonsubject	0	10	0
Quality exceeds industry standards	U.S. v. Nonsubject	0	8	2
Reliability of supply	U.S. v. Nonsubject	3	7	0
Technical support/service	U.S. v. Nonsubject	5	5	0
U.S. transportation costs	U.S. v. Nonsubject	6	3	1

Table continued

Table 2.11 (Continued) Ceramic tile: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Factor	Country pair	Superior	Comparable	Inferior
Availability	India v. Nonsubject	0	4	3
Availability of polished tile	India v. Nonsubject	3	2	2
Availability of matte tile	India v. Nonsubject	0	4	3
Availability of rectified tile	India v. Nonsubject	1	4	2
Delivery terms	India v. Nonsubject	0	6	1
Delivery time	India v. Nonsubject	1	3	3
Discounts offered	India v. Nonsubject	1	4	1
Innovative/trend-forward designs	India v. Nonsubject	0	2	4
Known or trusted brands	India v. Nonsubject	0	1	5
Minimum quantity requirements	India v. Nonsubject	0	5	2
Packaging	India v. Nonsubject	0	3	2
Payment terms	India v. Nonsubject	0	6	1
Price	India v. Nonsubject	4	2	1
Product consistency	India v. Nonsubject	0	3	4
Product range	India v. Nonsubject	1	3	3
Quality meets industry standards	India v. Nonsubject	0	4	3
Quality exceeds industry standards	India v. Nonsubject	0	3	4
Reliability of supply	India v. Nonsubject	0	2	5
Technical support/service	India v. Nonsubject	0	3	4
U.S. transportation costs	India v. Nonsubject	0	6	1

Source: Compiled from data submitted in response to Commission questionnaires.

Note: With respect to cost/price factors, a rating of superior means that the cost/price for the first source in the country pair is generally lower. For example, if a firm reported "U.S. superior," it meant that the U.S. product was generally priced lower than the imported product.

Comparison of U.S.-produced and imported ceramic tile

In order to determine whether U.S.-produced ceramic tile can generally be used in the same applications as imports from India and nonsubject countries, U.S. producers, importers, and purchasers were asked whether the products can always, frequently, sometimes, or never be used interchangeably. As shown in tables 2.12 to 2.14, the majority of U.S. producers and importers reported that ceramic tiles from the United States, India, and nonsubject countries were always or frequently interchangeable. The majority of purchasers reported that ceramic tile from the United States, India, and nonsubject countries were frequently interchangeable. Importer *** reported that ceramic tile produced in India and nonsubject countries is sometimes interchangeable with ceramic tile from the United States because U.S. producers do not make many of the aesthetic prints and tile sizes that are available in India. Importer *** further specified that rectified tile, polished tile, and soluble salt tile are not produced with the same aesthetics and sizes in the United States as in other countries; while slip resistant tile are not available from U.S. producers at all. Importer *** reported that double loaded and soluble salt ceramic tile is not produced by U.S. producers.

Table 2.12 Ceramic tile: Count of U.S. producers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	5	4	1	0
United States vs. Other	5	4	1	0
India vs. Other	5	4	1	0

Source: Compiled from data submitted in response to Commission questionnaires.

Table 2.13 Ceramic tile: Count of importers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	5	5	5	1
United States vs. Other	5	6	6	0
India vs. Other	5	5	6	0

Source: Compiled from data submitted in response to Commission questionnaires.

Table 2.14 Ceramic tile: Count of purchasers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	0	4	1	1
United States vs. Other	0	5	2	0
India vs. Other	0	4	2	0

Source: Compiled from data submitted in response to Commission questionnaires.

In addition, U.S. producers, importers, and purchasers were asked to assess how often differences other than price were significant in sales of ceramic tile from the United States, subject, or nonsubject countries. As seen in tables 2.15 to 2.17, the majority of U.S. producers and importers reported that there are sometimes or never differences other than price between ceramic tile from the United States, India, and nonsubject countries. At least half of purchasers reported there are always or frequently differences other than price between ceramic tile produced in the United States, India, and nonsubject countries. Importer *** reported that U.S. producers require the quantities ordered to exceed a certain threshold which only the largest consumers can commit to. Importer *** also reported that it was virtually impossible to source ceramic tiles with matching trims (mosaic, bullnose, V-cap, etc.) domestically. Importer *** reported that differences like finish (i.e. matte, polished, satin, high slip resistance, etc.) and technical characteristic (i.e. double loaded, colorbody, soluble salt etc.) are differences other than price between ceramic tiles produced in the United States and India. Importer *** reported that foreign producers have a greater product range than U.S. producers, but that U.S. producers had lower lead times. Purchaser *** reported that European and U.S. producers offer higher priced but higher quality ceramic tiles that are more reliable than ceramic tiles from India but that Indian ceramic tiles have higher quality and reliability than one would expect for the price.

Table 2.15 Ceramic tile: Count of U.S. producers reporting the significance of differences other than price between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	1	0	7	2
United States vs. Other	1	0	7	2
India vs. Other	1	0	6	2

Source: Compiled from data submitted in response to Commission questionnaires.

Table 2.16 Ceramic tile: Count of importers reporting the significance of differences between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	4	2	8	2
United States vs. Other	3	2	10	2
India vs. Other	3	1	9	2

Source: Compiled from data submitted in response to Commission questionnaires.

Table 2.17 Ceramic tile: Count of purchasers reporting the significance of differences between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. India	3	1	2	0
United States vs. Other	2	3	4	0
India vs. Other	2	1	3	0

Source: Compiled from data submitted in response to Commission questionnaires.

Elasticity estimates

This section discusses elasticity estimates. Parties were invited to comment on these estimates prior to the public hearing and submitted comments are referenced below.

U.S. supply elasticity

The domestic supply elasticity for ceramic tile measures the sensitivity of the quantity supplied by U.S. producers to changes in the U.S. market price of ceramic tile. The elasticity of domestic supply depends on several factors including the level of excess capacity, the ease with which producers can alter capacity, producers' ability to shift to production of other products, the existence of inventories, and the availability of alternate markets for U.S.-produced ceramic tile. Analysis of these factors above indicates that the U.S. industry has the ability to moderately increase or decrease shipments to the U.S. market; an estimate in the range of 3 to 6 is suggested.[9]

U.S. demand elasticity

The U.S. demand elasticity for ceramic tile measures the sensitivity of the overall quantity demanded to a change in the U.S. market price of ceramic tile. This estimate depends on factors discussed above such as the existence, availability, and commercial viability of substitute products, as well as the component share of the ceramic tile in the production of any downstream products. Based on the available information, the aggregate demand for ceramic tile is likely to be moderately inelastic; a range of -0.5 to -1.0 is suggested.

[9] Petitioners suggests that the U.S. elasticity of supply ranges from 8 to 10 based on the U.S, producers increasing production capacity throughout the period and levels of unused capacity in the interim period of 2024. Petitioner's prehearing brief pp. 21 to 22.

Substitution elasticity

The elasticity of substitution depends upon the extent of product differentiation between the domestic and imported products.[10] Product differentiation, in turn, depends upon such factors as quality (e.g., chemistry, appearance, etc.) and conditions of sale (e.g., availability, sales terms/discounts/promotions, etc.). Staff believes that there is a moderate-to-high degree of substitutability between domestically produced ceramic tile and ceramic tile imported from India. Based on available information, the elasticity of substitution between U.S.-produced ceramic tile and imported ceramic tile is likely to be in the range of 3 to 6.[11] While tiles from different sources can generally be used in similar applications, have similar lead times, similar availability, and moderate country preferences; there were reported differences in quality and differences in the size and finishes that are only available from certain sources.

[10] The substitution elasticity measures the responsiveness of the relative U.S. consumption levels of the subject imports and the domestic like products to changes in their relative prices. This reflects how easily purchasers switch from the U.S. product to the subject products (or vice versa) when prices change.

[11] Petitioners suggests that the substitution elasticity ranges from 8 to 10 based on U.S. producers reporting that they are able to produce and supply the U.S. market with the full range of tiles, including polished tile. Petitioner's prehearing brief pp. 23 to 24.

Part 3: U.S. producers' production, shipments, and employment

The Commission analyzes a number of factors in making injury determinations (see 19 U.S.C. §§ 1677(7)(B) and 1677(7)(C)). Information on the subsidies and dumping margins was presented in Part 1 of this report and information on the volume and pricing of imports of the subject merchandise is presented in Part 4 and Part 5. Information on the other factors specified is presented in this section and/or Part 6 and (except as noted) is based on the questionnaire responses of tens firms that accounted for the vast majority of U.S. production of ceramic tile during 2023.

U.S. producers

The Commission issued a U.S. producer questionnaire to 30 firms based on information contained in the petition. Ten firms provided usable data on their operations. Table 3.1 lists U.S. producers of ceramic tile, their production locations, positions on the petition, and shares of total production.

Table 3.1 Ceramic tile: U.S. producers, their positions on the petition, production locations, and shares of reported production, 2023

Shares in percent

Firm	Position on petition	Production location(s)	Share of production
AHF (Crossville Brand)	Petitioner	Crossville, TN	***
American Wonder	Petitioner	Lebanon, TN	***
Dal-Tile	Petitioner	Sunnyvale, TX Muskogee, OK El Paso, TX Florence, AL Dickson, TN Gettysburg, PA	***
Del Conca	Petitioner	Loudon, TN	***
Florida Tile	Petitioner	Lawrenceburg, KY	***
Florim	Petitioner	Clarksville, TN	***
Ironrock	***	Canton, OH	***
Landmark	Petitioner	Mount Pleasant, TN	***
Portobello	Petitioner	Baxter, TN	***
Stonepeak	Petitioner	Crossville, TN	***
All firms	Various	Various	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 3.2 presents information on U.S. producers' ownership, related and/or affiliated firms.

Table 3.2 Ceramic tile: U.S. producers' ownership, related and/or affiliated firms

Reporting firm	Relationship type and related firm	Details of relationship
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
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***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

As indicated in table 3.2, no U.S. producers are related to foreign producers of the subject merchandise and *** U.S. producers (***) are related to U.S. importers of the subject merchandise. In addition, as discussed in greater detail below, *** U.S. producers (***) directly import the subject merchandise and *** U.S. producer *** purchased the subject merchandise from U.S. importers. Eight U.S. producers are related to manufacturers of ceramic tile in nonsubject countries, and nine import ceramic tile from nonsubject countries.

Table 3.3 presents events in the U.S. industry since January 1, 2021.

Table 3.3 Ceramic tile: Important industry events since 2021

Item	Firm	Event
Expansion	Florim	In September 2021, Florim announced that it will invest $35 million in its Clarksville-Montgomery County plant in Clarksville, TN. Florim will add a new warehouse and invest in technologically advanced manufacturing machinery to increase the production capabilities and expand the range of product offerings. The investment is anticipated to add 33 jobs and bring employment to approximately 345 workers. The new 460,000 square foot warehouse became operational in 2023 and contains over 3 million cubic feet of storage for porcelain tile production.
Closure	Interceramic	On February 22, 2023, Interceramic announced that it will close its United States operations located in Carrollton, TX by March 1, 2023, resulting in the loss of approximately 400 jobs. Interceramic is the largest glazed floor tile manufacturer in North America.
Acquisition	AHF (Crossville Brands)	On October 13, 2023, AHF (Crossville Brands) headquartered in Dallas, TX, acquired Crossville Inc., a porcelain tile manufacturer located in Crossville, TN.
Opening	Portobello	On October 18, 2023, Portobello America held a grand opening ceremony for its new plant located in Baxter, TN. The plant's annual production capacity is 50 million square feet. The plant became operational in the summer of 2023 and is anticipated to generate 230 local jobs. Portobello plans to have a small-format line and a second kiln for field tiles, by year-end 2024.
Expansion	Stonepeak	In 2023, Stonepeak Ceramics invested $10 million in its TN production facility in Crossville. The company plans to upgrade and expand product output by investing in cutting-edge production technologies which include new polishing lines, new 12-bar digital printing machines with state-of-the-art capabilities and offering customers XL gauged porcelain stoneware slabs.
Expansion	Landmark	On March 22, 2024, Landmark Ceramics celebrated its $70 million tile production plant expansion in Mt. Pleasant, TN. The expansion will also make the plant location a North American logistics hub for Landmark, a subsidiary of Italy-based Gruppo Concorde S.p.A. Part of Landmark Ceramics plant expansion includes a new kiln that increases the plant's annual production capacity to 80 million square feet and add 78 new jobs.

Source: Business Facilities Magazine, “Two Manufacturing Projects Will Create Nearly 300 Jobs In Tennessee,” April 12, 2024, https://businessfacilities.com/two-manufacturers-invest-29m-to-expand-in-tennessee; Businesswire, “Paceline Equity Portfolio Company AHF Products Acquires Crossville, a Leading U.S. Porcelain Tile Manufacturer,” October 13, 2023, https://www.ahfproducts.com/en-us/press/ahf-products-enters-tile-category-with-purchase-of-assets-of-crossville-inc.html; ClarksvilleNow.com,” Florim USA expands with 460,000-square-foot warehouse in Clarksville,” November 1, 2023, https://clarksvillenow.com/local/florim-usa-expands-with-460000-square-foot-warehouse-in-clarksville/; Floor Daily, “Portobello America Holds Grand Opening for Tennessee Factory,” October 18, 2023, https://www.floordaily.net/flooring-news/portobello-america-holds-grand-opening-for-tennessee-factory; Dallas News, “Mexican company cutting 400 Texas jobs, closing Carrollton, Garland sites,” March 6, 2023, https://www.dallasnews.com/business/2023/03/06/mexican-tile-company-closing-down-us-operations-lay-off-nearly-400-across-texas/; Floor Daily, “Interceramic Closing TX Manufacturing, Corporate Functions & Showrooms,” April 12, 2023, https://www.floordaily.net/flooring-news/interceramic-closing-tx-manufacturing-corporate-functions-showrooms; Floor Daily, “Landmark Ceramics Cuts Ribbon on $70M Plant Expansion,“ March 25, 2024, https://www.floordaily.net/flooring-news/landmark-ceramics-cuts-ribbon-on-70m-plant-expansion; Floor Daily, “Portobello America's Tennessee Plant Slated to Open in April,” March 17, 2023, https://www.floordaily.net/flooring-news/portobello-americas-tennessee-plant-slated-to-open-in-april; Leaf Chronicle, “Florim to invest another $35 million in Montgomery County ceramic tile plant,” September 22, 2021, https://www.theleafchronicle.com/story/news/local/clarksville/2021/09/22/florim-invest-35-million-montgomery-county-ceramic-tile-plant/5813076001; Library Resources, “Interceramic USA – Closed,” (accessed May 16, 2023), https://libraryresources.net/manufacturer/interceramic-usa; Stonepeak Ceramics, “Stonepeak Ceramics expands investments to boost U.S. production,” September 18, 2023, https://www.stonepeakceramics.com/news-detail.php?id=184&t=stonepeak-ceramics-expands-investments-to-boost-u.s.-production/

Producers in the United States were asked to report any change in the character of their operations or organization relating to the production of ceramic tile since 2021. Eight of ten producers indicated in their questionnaires that they had experienced such changes. Table 3.4 presents the changes identified by these producers.

Table 3.4 Ceramic tile: U.S. producers' reported changes in operations, since January 1, 2021

Item	Firm name and narrative response on changes in operations
Plant openings	***
Prolonged shutdowns / idling of kilns	***
Prolonged shutdowns / idling of kilns	***
Prolonged shutdowns / idling of kilns	***
Prolonged shutdowns / idling of kilns	***
Prolonged shutdowns / idling of kilns	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***
Consolidations	***
Other	***

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. production, capacity, and capacity utilization

Table 3.5 presents U.S. producers' installed and practical capacity and production on the same equipment. Installed overall capacity increased year to year, ending 6.1 percent higher in 2023 than in 2021, and was 6.1 percent higher in January to September 2024 than in January to September 2023. Similarly, practical overall capacity increased year to year, ending 5.1 percent higher in 2023 than in 2021, but was 2.8 percent lower in January to September 2024 than in January to September 2023.

Table 3.5 Ceramic tile: U.S. producers' installed and practical capacity and production on the same equipment as in-scope production, by period

Capacity and production in 1,000 square feet; utilization in percent; interim is January through September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
Installed overall	Capacity	1,160,883	1,178,073	1,231,573	917,463	973,247
Installed overall	Production	891,535	896,036	868,932	666,950	606,962
Installed overall	Utilization	76.8	76.1	70.6	72.7	62.4
Practical overall	Capacity	1,003,486	1,030,159	1,054,254	794,246	771,905
Practical overall	Production	891,535	896,036	868,932	666,950	606,962
Practical overall	Utilization	88.8	87.0	82.4	84.0	78.6
Practical Ceramic tile	Capacity	1,003,486	1,030,159	1,054,254	794,246	771,861
Practical Ceramic tile	Production	891,535	896,036	868,932	666,950	606,962
Practical Ceramic tile	Utilization	88.8	87.0	82.4	84.0	78.6

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 3.6 presents U.S. producers' reported narratives regarding practical capacity constraints.

Table 3.6 Ceramic tile: U.S. producers' reported capacity constraints since January 1, 2021

Item	Firm name and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Storage capacity	***
Other constraints	***
Other constraints	***
Other constraints	***
Other constraints	***
Other constraints	***
Other constraints	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table 3.7 and figure 3.1 present U.S. producers' production, capacity, and capacity utilization. U.S. producers' practical capacity increased by 5.1 percent during 2021 to 2023, this was largely due to two firms: ***. U.S. producers' practical capacity was 2.8 percent lower in January to September 2024 than in January to September 2023. Ceramic tile production fluctuated but decreased by 2.5 percent during 2021 through 2023, and was 9.0 percent lower in January to September 2024 than in January to September 2023. Four of nine U.S. producers that operated continuously throughout the reporting period, had lower production in 2023 than in 2021. U.S. producers' average capacity utilization decreased year to year, ending 6.4 percentage points lower in 2023 than in 2021, and was 5.3 percentage points lower in January to September 2024 than in January to September 2023.

Table 3.7 Ceramic tile: U.S. producers' output, by firm and period

Practical capacity

Capacity in 1,000 square feet; interim is January through September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	1,003,486	1,030,159	1,054,254	794,246	771,861

Table continued.

Table 3.7 (Continued) Ceramic tile: U.S. producers' output, by firm and period

Production

Production in 1,000 square feet; interim is January through September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	891,535	896,036	868,932	666,950	606,962

Table continued.

Table 3.7 (Continued) Ceramic tile: U.S. producers' output, by firm and period

Capacity utilization

Capacity utilization in percent; interim is January through September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	88.8	87.0	82.4	84.0	78.6

Table continued.

Note: Capacity utilization ratio represents the ratio of the U.S. producer's production to its production capacity.

Table 3.7 (Continued) Ceramic tile: U.S. producers' output, by firm and period

Share of production

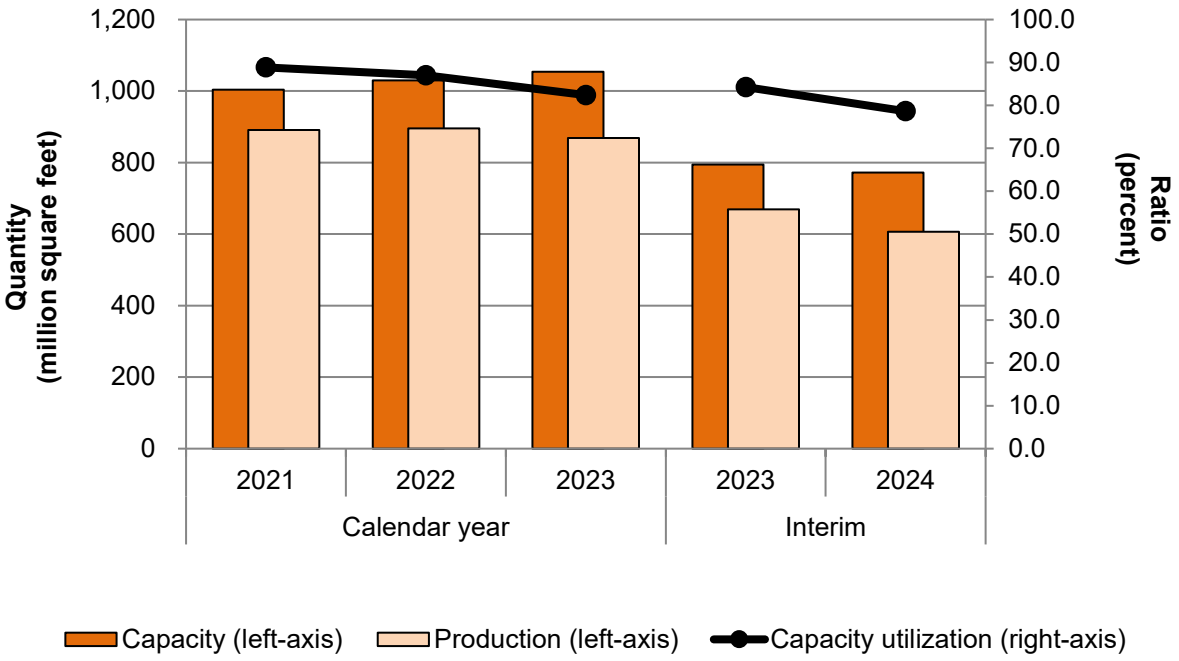
Share in percent; interim is January through September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Figure 3.1 Ceramic tile: U.S. producers' output, by period



Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

No responding U.S. producer reported production of other products using the same equipment to produce ceramic tile.

U.S. producers' U.S. shipments and exports

Table 3.8 presents U.S. producers' U.S. shipments, export shipments, and total shipments. U.S. shipments accounted for the majority of U.S. producers' total shipments from 2021 to 2023.[1] The quantity of their U.S. shipments fluctuated but decreased by 6.2 percent during 2021 to 2023. The decrease reflects ***. The value of U.S. producers' U.S. shipments fluctuated year to year, increasing overall by 7.8 percent during 2021 through 2023, but was 6.2 percent lower in January to September 2024 than in January to September 2023.

[1] Four firms reported internal consumption, including firm's own retail sales, accounting for less than 1.7 percent of U.S. producers' U.S. shipments in any single year during 2021 to 2023. While two firms reported transfers to related firms, accounting for less than 1.0 percent of U.S. producers' U.S. shipments in any single year during 2021 to 2023.

The average unit value of U.S. producers' U.S. shipments increased year to year, ending 15.0 percent higher in 2023 than in 2021. and was 3.3 percent higher in January to September 2024 than in January to September 2023.[2] [3]

Table 3.8 Ceramic tile: U.S. producers' total shipments, by destination and period

Quantity in 1,000 square feet; value in 1,000 dollars; unit value in dollars per square foot; shares in percent; interim is January through September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. shipments	Quantity	854,822	861,750	801,728	609,318	553,569
Export shipments	Quantity	11,408	15,019	14,560	11,558	10,174
Total shipments	Quantity	866,230	876,769	816,288	620,876	563,743
U.S. shipments	Value	1,229,590	1,347,628	1,326,004	1,010,830	948,519
Export shipments	Value	19,404	26,704	27,995	21,018	21,161
Total shipments	Value	1,248,994	1,374,332	1,353,999	1,031,848	969,680
U.S. shipments	Unit value	1.44	1.56	1.65	1.66	1.71
Export shipments	Unit value	1.70	1.78	1.92	1.82	2.08
Total shipments	Unit value	1.44	1.57	1.66	1.66	1.72
U.S. shipments	Share of quantity	98.7	98.3	98.2	98.1	98.2
Export shipments	Share of quantity	1.3	1.7	1.8	1.9	1.8
Total shipments	Share of quantity	100.0	100.0	100.0	100.0	100.0
U.S. shipments	Share of value	98.4	98.1	97.9	98.0	97.8
Export shipments	Share of value	1.6	1.9	2.1	2.0	2.2
Total shipments	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

By quantity, export shipments accounted for a minority share of U.S. producers' total shipments in each year from 2021 to 2023.[4] The quantity of their export shipments fluctuated, but increased by 27.6 percent during 2021 to 2023. The value of U.S. producers' export

[2] ***.

[3] Appendix E presents U.S. producers' and U.S. importers' U.S. shipments monthly average unit values.

[4] Eight of the ten firms (except ***) reported exports during 2021 to 2023, and January to September 2024, with ***.

shipments increased yearly from 2021 to 2023, ending 44.3 percent higher. The unit value of their export shipments increased year to year, ending 13.0 percent higher in 2023 than in 2021. In the first nine months of 2024, the quantity of exports fell 12.0 percent compared with the same period of 2023; however, exports rose 0.7 in terms of value and 14.4 percent by unit value.

Table 3.9 presents U.S. producers' U.S. shipments by water permeability, which shows that the vast majority of U.S. producers' U.S. shipments were porcelain versus non-porcelain ceramic tiles.[5]

Table 3.9 Ceramic tile: U.S. producers' U.S. shipments, by water permeability, 2023

Quantity in 1,000 of square feet; share in percent

Water permeability	Quantity	Share
Porcelain	***	***
Non-porcelain	***	***
All water permeabilities	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table 3.10 presents information on U.S. producers' U.S. shipments by use, and product type. In 2023, non-rectified tile comprised the majority (*** percent) of U.S. shipments, while rectified tile comprised the remaining *** percent of U.S. shipments. The majority of U.S. producers' U.S. shipments, by polish type, were of matte ceramic tile (*** percent) and, by type, were of small and medium (less than 11 square feet) non-mosaic ceramic tile (*** percent).

[5] In 2023, all ten U.S. producers reports U.S. shipments of porcelain ceramic tile, while three U.S producers (***) reported U.S. shipments of non-porcelain ceramic tile.

Table 3.10 Ceramic tile: U.S. producers' U.S. shipments, by type, polish, and side precision, 2023

Quantity in 1,000 of square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table 3.10 (Continued) Ceramic tile: U.S. producers' U.S. shipments, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table 3.10 (Continued) Ceramic tile: U.S. producers' U.S. shipments, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table 3.10 (Continued) Ceramic tile: U.S. producers' U.S. shipments, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

U.S. producers' inventories

Table 3.11 presents U.S. producers' end-of-period inventories and the ratio of these inventories to U.S. producers' production, U.S. shipments, and total shipments**.** U.S. producers' end-of-period inventories increased by 7.5 from 2021 to 2023, and was 10.0 percent higher in

January to September 2024 than in January to September 2023.[6] The ratios of U.S. producers' end-of-period inventories to their U.S. production, U.S. shipments, and total shipments each increased in every year from 2021 to 2023, ending 3.4 percentage points, 5.1 percentage points, and 4.9 percentage points higher, respectively.

Table 3.11 Ceramic tile: U.S. producers' inventories and their ratio to select items, by period

Quantity in 1,000 square feet; ratio in percent; interim is January through September

Item	2021	2022	2023	Interim 2023	Interim 2024
End-of-period inventory quantity	299,878	299,183	322,249	314,994	346,365
Inventory ratio to U.S. production	33.6	33.4	37.1	35.4	42.8
Inventory ratio to U.S. shipments	35.1	34.7	40.2	38.8	46.9
Inventory ratio to total shipments	34.6	34.1	39.5	38.1	46.1

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

U.S. producers' imports from subject sources

U.S. producers' imports of ceramic tile are presented in tables 3.12 and 3.13. *** directly imported ceramic tile from India.

Table 3.12 Ceramic tile: *'s U.S. production, subject imports, and ratio of subject imports to production, by source and period**

Quantity in 1,000 square feet; ratio in percent; interim is January through September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. production	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

[6] All U.S. producers other than *** reported higher end-of-period inventories in 2023 than in 2021.

Table 3.13 Ceramic tile: *'s U.S. production, subject imports, and ratio of subject imports to production, by source and period**

Quantity in 1,000 square feet; ratio in percent; interim is January through September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. production	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 3.14 Ceramic tile: U.S. producers' reasons for importing

Item	Narrative response on reasons for importing
***'s reason for importing	***
***'s reason for importing	***

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers' purchases of imports from subject sources

No responding U.S. producer reported purchases of ceramic tile from 2021 to 2023 and both interim periods.

U.S. employment, wages, and productivity

Table 3.15 shows U.S. producers' employment-related data. The number of production-related workers ("PRWs") increased by 8.0 percent from 2021 to 2023 and were 3.2 percent higher in January to September 2024 than in January to September 2023.[7] Productivity decreased by 7.4 percent from 2021 to 2023 and was 36.1 percent lower in January to September 2024 than in January to September 2023. Unit labor costs and total hours worked, conversely, increased during 2021 to 2023, ending 18.4 percent and 5.3 percent higher, respectively. Hours worked per PRW decreased 2.5 percent during 2021 to 2023, while wages paid and hourly wages increased 15.4 percent and 9.6 percent, respectively, from 2021 to 2023.

Table 3.15 Ceramic tile: U.S. producers' employment related information, by period

Item	2021	2022	2023	Interim 2023	Interim 2024
Production and related workers (PRWs) (number)	3,665	3,765	3,958	3,988	4,117
Total hours worked (1,000 hours)	7,524	7,514	7,920	6,103	8,695
Hours worked per PRW (hours)	2,053	1,996	2,001	1,530	2,112
Wages paid ($1,000)	210,969	224,081	243,451	186,723	208,298
Hourly wages (dollars per hour)	$28.04	$29.82	$30.74	$30.60	$23.96
Productivity (square feet per hour)	118.5	119.2	109.7	109.3	69.8
Unit labor costs (dollars per square foot)	$0.24	$0.25	$0.28	$0.28	$0.34

Source: Compiled from data submitted in response to Commission questionnaires.

[7] Seven of 10 U.S. producers increased the number of PRWs, with ***.

Part 4: U.S. imports, apparent U.S. consumption, and market shares

U.S. importers

The Commission issued importer questionnaires to 90 firms believed to be importers of subject ceramic tile, as well as to all U.S. producers of ceramic tile.[1] Usable questionnaire responses were received from 19 companies, representing *** percent of U.S. imports from India and *** percent of imports from nonsubject countries in 2023.[2] Table 4.1 lists all responding U.S. importers of ceramic tile from India and other sources, their locations, and their shares of U.S. imports, in 2023.

[1] The Commission issued questionnaires to those firms identified in the petitions; staff research; and proprietary, Census-edited Customs' import records.

[2] Import coverage was calculated as a share of imports, as reported in questionnaire responses, divided by official import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051.

Table 4.1 Ceramic tile: U.S. importers, their headquarters, and share of imports within each source, 2023

Share in percent

Firm	Headquarters	India	Brazil	Italy	Mexico
AHF (Crossville Brand)	Mountville, PA	***	***	***	***
Anatolia	Vaughan - Canada, ON	***	***	***	***
Bedrosians	Fresno, CA	***	***	***	***
CRW	Westland, MI	***	***	***	***
Dal-Tile	Dallas, TX	***	***	***	***
Del Conca	Loudon, TN	***	***	***	***
Einstein Floors	Houston, TX	***	***	***	***
FD Sales	Atlanta, GA	***	***	***	***
Florim	Clarksville, TN	***	***	***	***
Kertiles	Miami, FL	***	***	***	***
L G Sourcing	Mooresville, NC	***	***	***	***
Landmark	Mount Pleasant, TN	***	***	***	***
M S International	Orange, CA	***	***	***	***
North America Tile	Miami, FL	***	***	***	***
Florida Tile	Lexington, KY	***	***	***	***
Portobello	Baxter, TN	***	***	***	***
Shivam	Shridan, WY	***	***	***	***
Starbucks	Seattle, WA	***	***	***	***
Stonepeak	Chicago, IL	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0

Table continued.

Table 4.1 (Continued) Ceramic tile: U.S. importers, their headquarters, and share of imports within each source, 2023

Share in percent

Firm	Headquarters	Spain	All other sources	Nonsubject sources	All import sources
AHF (Crossville Brand)	Mountville, PA	***	***	***	***
Anatolia	Vaughan - Canada, ON	***	***	***	***
Bedrosians	Fresno, CA	***	***	***	***
CRW	Westland, MI	***	***	***	***
Dal-Tile	Dallas, TX	***	***	***	***
Del Conca	Loudon, TN	***	***	***	***
Einstein Floors	Houston, TX	***	***	***	***
FD Sales	Atlanta, GA	***	***	***	***
Florim	Clarksville, TN	***	***	***	***
Kertiles	Miami, FL	***	***	***	***
L G Sourcing	Mooresville, NC	***	***	***	***
Landmark	Mount Pleasant, TN	***	***	***	***
M S International	Orange, CA	***	***	***	***
North America Tile	Miami, FL	***	***	***	***
Florida Tile	Lexington, KY	***	***	***	***
Portobello	Baxter, TN	***	***	***	***
Shivam	Shridan, WY	***	***	***	***
Starbucks	Seattle, WA	***	***	***	***
Stonepeak	Chicago, IL	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

U.S. imports

Table 4.2, 4.3, and figure 4.1 present data for U.S. imports of ceramic tile from India and all other sources.[3] U.S. imports from India by quantity and value increased in every year from 2021 to 2023, ending 85.9 percent, and 57.2 percent higher, respectively. During January to September 2024 compared to January to September 2023 imports of ceramic tile from India by quantity and value were higher by 3.2 percent, and 3.3 percent, respectively. The unit value of imports from India increased in 2022 and then decreased in 2023, for an overall decline of 15.4 percent between 2021 and 2023, and remained the same in January to September 2024 compared to January to September 2023.

[3] Appendix G presents import data between 2016 and February 2025.

U.S. imports from nonsubject sources by quantity decreased in every year from 2021 to 2023, ending 20.7 percent lower, and was 7.4 percent lower in January to September 2024 than in January to September 2023. U.S. imports from nonsubject sources by value fluctuated year to year, increasing from 2021 to 2022 then decreasing from 2022 to 2023, ending 1.4 percent lower, and was 8.5 percent lower in January to September 2024 than in January to September 2023. The unit value of imports from nonsubject sources increased in each year, ending 24.4 percent higher in 2023 than in 2021, but was 1.2 percent lower in January to September 2024 than in January to September 2023.

Table 4.2 Ceramic tile: U.S. imports by source and period

Quantity in 1,000 square feet; value in 1,000 dollars; unit value in dollars per square feet; interim is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
India	Quantity	217,789	283,919	404,825	303,060	312,903
Brazil	Quantity	236,573	225,696	184,634	146,971	106,661
Italy	Quantity	387,502	376,392	298,884	227,272	229,029
Mexico	Quantity	358,997	362,515	334,322	257,374	218,286
Spain	Quantity	492,788	430,616	347,995	268,565	262,157
All other sources	Quantity	530,417	496,268	425,666	319,172	312,439
Nonsubject sources	Quantity	2,006,277	1,891,486	1,591,501	1,219,354	1,128,572
All import sources	Quantity	2,224,066	2,175,405	1,996,326	1,522,414	1,441,475
India	Value	164,529	246,368	258,718	191,715	198,005
Brazil	Value	170,007	192,180	160,678	126,426	92,853
Italy	Value	787,996	885,957	719,674	552,963	527,531
Mexico	Value	244,140	266,570	289,286	220,448	200,114
Spain	Value	631,289	786,817	658,138	515,158	464,946
All other sources	Value	494,012	555,371	468,157	356,425	334,651
Nonsubject sources	Value	2,327,443	2,686,895	2,295,933	1,771,419	1,620,095
All import sources	Value	2,491,972	2,933,264	2,554,650	1,963,134	1,818,099
India	Unit value	0.76	0.87	0.64	0.63	0.63
Brazil	Unit value	0.72	0.85	0.87	0.86	0.87
Italy	Unit value	2.03	2.35	2.41	2.43	2.30
Mexico	Unit value	0.68	0.74	0.87	0.86	0.92
Spain	Unit value	1.28	1.83	1.89	1.92	1.77
All other sources	Unit value	0.93	1.12	1.10	1.12	1.07
Nonsubject sources	Unit value	1.16	1.42	1.44	1.45	1.44
All import sources	Unit value	1.12	1.35	1.28	1.29	1.26

Table continued.

Table 4.2 (Continued) Ceramic tile: Share of U.S. imports by source and period

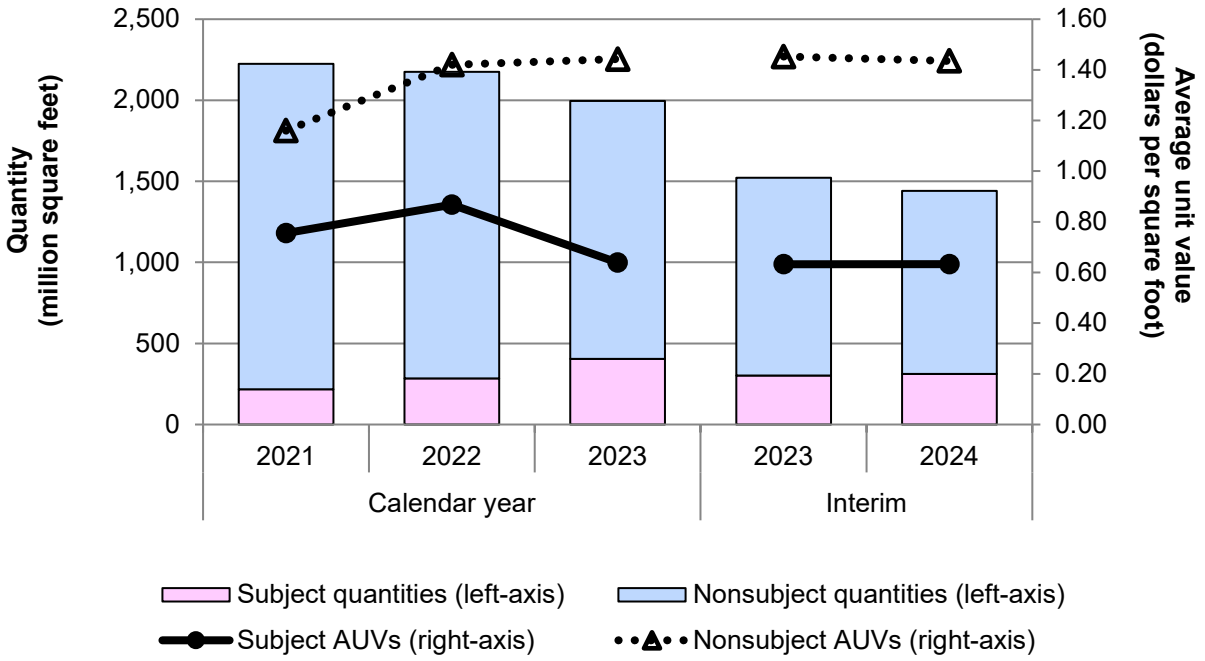
Share and ratio in percent; interim is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
India	Share of quantity	9.8	13.1	20.3	19.9	21.7
Brazil	Share of quantity	10.6	10.4	9.2	9.7	7.4
Italy	Share of quantity	17.4	17.3	15.0	14.9	15.9
Mexico	Share of quantity	16.1	16.7	16.7	16.9	15.1
Spain	Share of quantity	22.2	19.8	17.4	17.6	18.2
All other sources	Share of quantity	23.8	22.8	21.3	21.0	21.7
Nonsubject sources	Share of quantity	90.2	86.9	79.7	80.1	78.3
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
India	Share of value	6.6	8.4	10.1	9.8	10.9
Brazil	Share of value	6.8	6.6	6.3	6.4	5.1
Italy	Share of value	31.6	30.2	28.2	28.2	29.0
Mexico	Share of value	9.8	9.1	11.3	11.2	11.0
Spain	Share of value	25.3	26.8	25.8	26.2	25.6
All other sources	Share of value	19.8	18.9	18.3	18.2	18.4
Nonsubject sources	Share of value	93.4	91.6	89.9	90.2	89.1
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
India	Ratio	24.4	31.7	46.6	45.3	51.6
Brazil	Ratio	26.5	25.2	21.2	22.0	17.6
Italy	Ratio	43.5	42.0	34.4	34.0	37.7
Mexico	Ratio	40.3	40.5	38.5	38.5	36.0
Spain	Ratio	55.3	48.1	40.0	40.1	43.2
All other sources	Ratio	59.5	55.4	49.0	47.7	51.5
Nonsubject sources	Ratio	225.0	211.1	183.2	182.3	185.9
All import sources	Ratio	249.5	242.8	229.7	227.6	237.5

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as “---".

Figure 4.1 Ceramic tile: U.S. import quantities and average unit values, by source and period



Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Table 4.3 Ceramic tile: Changes in U.S. imports, by source and period

Changes (Δ) in percent (%) or percentage point (ppt)

Source	Measure	2021 to 2023	2021 to 2022	2022 to 2023	Interim 2023 to 2024
India	%Δ Quantity	▲85.9	▲30.4	▲42.6	▲3.2
Brazil	%Δ Quantity	▼(22.0)	▼(4.6)	▼(18.2)	▼(27.4)
Italy	%Δ Quantity	▼(22.9)	▼(2.9)	▼(20.6)	▲0.8
Mexico	%Δ Quantity	▼(6.9)	▲1.0	▼(7.8)	▼(15.2)
Spain	%Δ Quantity	▼(29.4)	▼(12.6)	▼(19.2)	▼(2.4)
All other sources	%Δ Quantity	▼(19.7)	▼(6.4)	▼(14.2)	▼(2.1)
Nonsubject sources	%Δ Quantity	▼(20.7)	▼(5.7)	▼(15.9)	▼(7.4)
All import sources	%Δ Quantity	▼(10.2)	▼(2.2)	▼(8.2)	▼(5.3)
India	%Δ Value	▲57.2	▲49.7	▲5.0	▲3.3
Brazil	%Δ Value	▼(5.5)	▲13.0	▼(16.4)	▼(26.6)
Italy	%Δ Value	▼(8.7)	▲12.4	▼(18.8)	▼(4.6)
Mexico	%Δ Value	▲18.5	▲9.2	▲8.5	▼(9.2)
Spain	%Δ Value	▲4.3	▲24.6	▼(16.4)	▼(9.7)
All other sources	%Δ Value	▼(5.2)	▲12.4	▼(15.7)	▼(6.1)
Nonsubject sources	%Δ Value	▼(1.4)	▲15.4	▼(14.6)	▼(8.5)
All import sources	%Δ Value	▲2.5	▲17.7	▼(12.9)	▼(7.4)
India	%Δ Unit value	▼(15.4)	▲14.9	▼(26.4)	▲0.0
Brazil	%Δ Unit value	▲21.1	▲18.5	▲2.2	▲1.2
Italy	%Δ Unit value	▲18.4	▲15.8	▲2.3	▼(5.3)
Mexico	%Δ Unit value	▲27.2	▲8.1	▲17.7	▲7.0
Spain	%Δ Unit value	▲47.6	▲42.6	▲3.5	▼(7.5)
All other sources	%Δ Unit value	▲18.1	▲20.2	▼(1.7)	▼(4.1)
Nonsubject sources	%Δ Unit value	▲24.4	▲22.5	▲1.6	▼(1.2)
All import sources	%Δ Unit value	▲14.2	▲20.3	▼(5.1)	▼(2.2)

Table continued.

Table 4.3 (Continued) Ceramic tile: Changes in U.S. imports, by source and period

Changes (Δ) in percent (%) or percentage point (ppt)

Source	Measure	2021 to 2023	2021 to 2022	2022 to 2023	Interim 2023 to 2024
India	ppt Δ Quantity	▲10.5	▲3.3	▲7.2	▲1.8
Brazil	ppt Δ Quantity	▼(1.4)	▼(0.3)	▼(1.1)	▼(2.3)
Italy	ppt Δ Quantity	▼(2.5)	▼(0.1)	▼(2.3)	▲1.0
Mexico	ppt Δ Quantity	▲0.6	▲0.5	▲0.1	▼(1.8)
Spain	ppt Δ Quantity	▼(4.7)	▼(2.4)	▼(2.4)	▲0.5
All other sources	ppt Δ Quantity	▼(2.5)	▼(1.0)	▼(1.5)	▲0.7
Nonsubject sources	ppt Δ Quantity	▼(10.5)	▼(3.3)	▼(7.2)	▼(1.8)
All import sources	ppt Δ Quantity	—	—	—	—
India	ppt Δ Value	▲3.5	▲1.8	▲1.7	▲1.1
Brazil	ppt Δ Value	▼(0.5)	▼(0.3)	▼(0.3)	▼(1.3)
Italy	ppt Δ Value	▼(3.5)	▼(1.4)	▼(2.0)	▲0.8
Mexico	ppt Δ Value	▲1.5	▼(0.7)	▲2.2	▼(0.2)
Spain	ppt Δ Value	▲0.4	▲1.5	▼(1.1)	▼(0.7)
All other sources	ppt Δ Value	▼(1.5)	▼(0.9)	▼(0.6)	▲0.3
Nonsubject sources	ppt Δ Value	▼(3.5)	▼(1.8)	▼(1.7)	▼(1.1)
All import sources	ppt Δ Ratio	—	—	—	—
India	ppt Δ Ratio	▲22.2	▲7.3	▲14.9	▲6.2
Brazil	ppt Δ Ratio	▼(5.3)	▼(1.3)	▼(3.9)	▼(4.4)
Italy	ppt Δ Ratio	▼(9.1)	▼(1.5)	▼(7.6)	▲3.8
Mexico	ppt Δ Ratio	▼(1.8)	▲0.2	▼(2.0)	▼(2.5)
Spain	ppt Δ Ratio	▼(15.2)	▼(7.2)	▼(8.0)	▲3.0
All other sources	ppt Δ Ratio	▼(10.5)	▼(4.1)	▼(6.4)	▲3.8
Nonsubject sources	ppt Δ Ratio	▼(41.9)	▼(13.9)	▼(27.9)	▲3.7
All import sources	ppt Δ Ratio	▼(19.7)	▼(6.7)	▼(13.0)	▲9.9

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "—". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

Table 4.4 presents data for U.S. producers' and/or their affiliates, U.S. imports, by source and period.

Table 4.4. Ceramic tile: U.S. producers' and/or affiliates' U.S. imports, by source and period

Quantity in 1,000 square feet; ratio in percent; Interim period is January to September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Ratio calculated as the quantity controlled by U.S. producers based on questionnaire data relative to U.S. imports statistics as shown in table IV-2.

Tables 4.5 and 4.6 presents U.S. importers' U.S. shipments by water permeability and source.[4] In 2023, porcelain tile comprised the majority, *** percent, while non-porcelain tile comprised *** percent of U.S. shipments from India, by quantity. During the same year, porcelain tile comprised the majority, *** percent, while non-porcelain tile comprised *** percent of U.S. shipments from nonsubject sources, by quantity.

Table 4.5 Ceramic tile: U.S. importers' U.S. shipments of imports from India, by water permeability, 2023

Quantity in 1,000 of square feet; share in percent

Water permeability	Quantity	Share
Porcelain	***	***
Non-porcelain	***	***
All water permeabilities	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

[4] Appendix F presents U.S. importers' U.S. shipments of imports from nonsubject sources by type.

Table 4.6 Ceramic tile: U.S. importers' U.S. shipments of imports from nonsubject, by water permeability, 2023

Quantity in 1,000 of square feet; share in percent

Water permeability	Quantity	Share
Porcelain	***	***
Non-porcelain	***	***
All water permeabilities	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Tables 4.7 and 4.8 present information on U.S. importers' U.S. shipments by use, and product type. In 2023, rectified tile comprised the vast majority (*** percent) of U.S. shipments from India, while non-rectified tile comprised the majority (*** percent) of U.S. shipments from nonsubject sources. In 2023, small and medium (less than 11 square feet) non-mosaic tiles comprised the vast majority (*** percent) of U.S. shipments from India and the majority (*** percent) of U.S. shipments from nonsubject sources, by quantity. In 2023, polished ceramic tile comprised the majority (*** percent) of U.S. shipments from India while matte ceramic tile comprised the majority (*** percent) of U.S. shipments from nonsubject sources.

Table 4.7 Ceramic tile: U.S. importers' U.S. shipments of imports from India, by type, polish, and side precision, 2023

Quantity in 1,000 of square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table 4.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments of imports from India, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table 4.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments of imports from India, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table 4.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments of imports from India, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 4.8 Ceramic tile: U.S. importers' U.S. shipments from nonsubject, by type, polish, and side precision, 2023

Quantity in 1,000 of square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table 4.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from nonsubject, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table 4.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from nonsubject, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table 4.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from nonsubject, by type, polish, and side precision, 2023

Share across down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Negligibility

The statute requires that an investigation be terminated without an injury determination if imports of the subject merchandise are found to be negligible.[5] Negligible imports are generally defined in the Act, as amended, as imports from a country of merchandise corresponding to a domestic like product where such imports account for less than 3 percent of the volume of all such merchandise imported into the United States in the most recent 12-month period for which data are available that precedes the filing of the petition or the initiation of the investigation. However, if there are imports of such merchandise from a number of countries subject to investigations initiated on the same day that individually account for less than 3 percent of the total volume of the subject merchandise, and if the imports from those countries collectively account for more than 7 percent of the volume of all such merchandise imported into the United States during the applicable 12-month period, then imports from such countries are deemed not to be negligible.[6] Imports from India accounted for *** percent of total imports of ceramic tile by quantity during April 2023 through March 2024.

[5] Sections 703(a)(1), 705(b)(1), 733(a)(1), and 735(b)(1) of the Act (19 U.S.C. §§ 1671b(a)(1), 1671d(b)(1), 1673b(a)(1), and 1673d(b)(1)).

[6] Section 771 (24) of the Act (19 U.S.C § 1677(24)).

Table 4.9 Ceramic tile: U.S. imports in the twelve-month period preceding the filing of the petition, April 2023 through March 2024

Quantity in 1,000 square feet; share in percent

Source of imports	Quantity	Share of quantity
India CVD	***	***
Nonsubject sources	***	***
All import sources	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires and from proprietary, Census-edited Customs records using HTS statistical reporting numbers, 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10, 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—". In the CVD investigation, Commerce in its final determination found critical circumstances exist for imports from India excluding Antiqa and Win-Tel.

Note: Commerce final determined that ceramic tile from India is not being, or is not likely to be, sold in the United States at LTFV.

Critical circumstances

On April 23, 2025, Commerce issued its final determination that "critical circumstances" exist with regard to imports ceramic tile from India for all other exporters/ producers than Antiqa and Win-Tel.[7] In this investigation, if both Commerce and the Commission make affirmative final critical circumstances determinations, certain subject imports may be subject to antidumping duties retroactive by 90 days from September 27, 2024, the effective date of Commerce's preliminary CVD affirmative determination. Table 4.5 presents this data.

[7] 90 FR 17036, April 23, 2025, referenced in app. A. When petitioners file timely allegations of critical circumstances, Commerce examines whether there is a reasonable basis to believe or suspect that (1) either there is a history of dumping and material injury by reason of dumped imports in the United States or elsewhere of the subject merchandise, or the person by whom, or for whose account, the merchandise was imported knew or should have known that the exporter was selling the subject merchandise at LTFV and that there was likely to be material injury by reason of such sales; and (2) there have been massive imports of the subject merchandise over a relatively short period.

Table 4.10 Ceramic tile: U.S. imports subject to Commerce's affirmative final critical circumstances determination

Quantity in 1,000 square feet

Month	Relation to petition	Quantity
December 2023	Before	***
January 2024	Before	***
February 2024	Before	***
March 2024	Before	***
April 2024	Before	***
May 2024	After	***
June 2024	After	***
July 2024	After	***
August 2024	After	***
September 2024	After	***

Table continued.

Table 4.10 (Continued) Ceramic tile: U.S. imports subject to Commerce's affirmative final critical circumstances determination

Quantity in 1,000 square feet; different in percent

Comparison pre-post petition period	Cumulative before period quantity	Cumulative after period quantity	Difference in percent
1 month	***	***	***
2 months	***	***	***
3 months	***	***	***
4 months	***	***	***
5 months	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and from proprietary, Census-edited Customs records using HTS statistical reporting numbers, 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10, 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". In the CVD investigation, Commerce in its final determination found critical circumstances exist for all imports from India.

Figure 4.2 Ceramic tile: U.S. imports from India potentially subject to Commerce's final critical circumstances determination in the CVD investigation, October 2023 through September 2024

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires and from proprietary, Census-edited Customs records using HTS statistical reporting numbers, 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10, 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". In the CVD investigation, Commerce in its final determination found critical circumstances exist for imports from India excluding Antiqa and Win-Tel.

Table 4.11 Ceramic tile: U.S. imports' U.S. inventories of imports from India for analysis in relation to the final affirmative Commerce critical circumstances determinations in the AD/CVD investigations by date

Quantity in 1,000 square feet; index in percent where Match 31, 2024 = 100.0 percent

Inventories on or around	Quantity	Index
March 31,2024	***	100.0
April 30, 2024	***	109.3
May 31, 2024	***	119.0
June 30, 2024	***	124.6
July 31, 2024	***	119.2
August 31, 2024	***	116.0
September 30, 2024	***	114.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". In the CVD investigation, Commerce in its final determination found critical circumstances exist for imports from India excluding Antiqa and Win-Tel.

Apparent U.S. consumption and market shares

Quantity

Table 4.12 and figure 4.3 presents data on apparent U.S. consumption and U.S. market shares by quantity for ceramic tile. Apparent U.S. consumption decreased year to year between 2021 and 2023, ending 9.0 percent lower, and was 6.4 percent lower in January to September 2024 than in January to September 2023. The decrease in apparent U.S. consumption between 2021 and 2023 reflects the decreases in U.S. producers' U.S. shipments and U.S. shipments of imports from nonsubject sources.[8]

During 2021 to 2023, U.S. producers' market share increased by 0.9 percentage points, but was 0.8 percentage points lower in January to September 2024 than in January to September 2023. While the market share of U.S. shipments of imports from India was the smallest of the three sources, it increased by 7.4 percentage points from 2021 to 2023, and was 1.5 percentage points higher in January to September 2024 than in January to September 2023. The market share of U.S. shipments of imports from nonsubject sources decreased by 8.3 percentage points from 2021 to 2023 but was 0.6 percentage points lower in January to September 2024 than in January to September 2023.

[8] U.S. producers' U.S. shipments, which increased slightly in 2022, ended *** percent lower in 2023 than in 2021, while imports from nonsubject sources decreased each year, ending *** percent lower in 2023 than in 2021. During the same period U.S. imports from India increased each year, ending *** percent higher in 2023 than in 2021.

Table 4.12 Ceramic tile: Apparent U.S. consumption and market shares based on quantity, by source and period

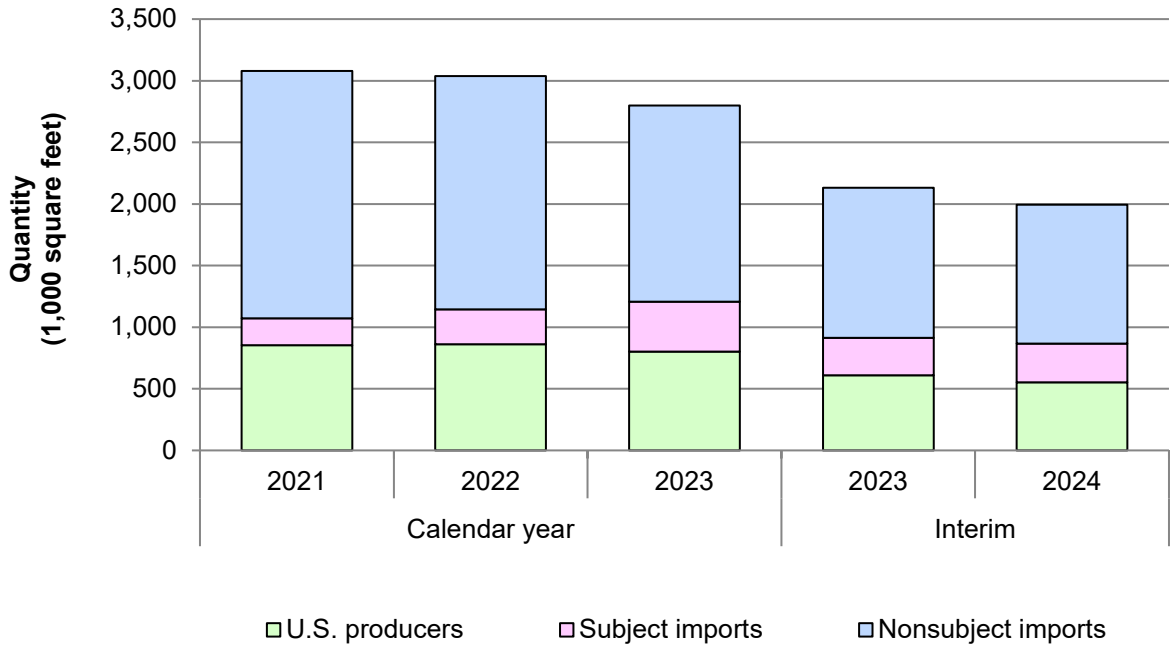
Quantity in 1,000; shares in percent; interim is January through January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	854,822	861,750	801,728	609,318	553,569
India	Quantity	217,789	283,919	404,825	303,060	312,903
Brazil	Quantity	236,573	225,696	184,634	146,971	106,661
Italy	Quantity	387,502	376,392	298,884	227,272	229,029
Mexico	Quantity	358,997	362,515	334,322	257,374	218,286
Spain	Quantity	492,788	430,616	347,995	268,565	262,157
All other sources	Quantity	530,417	496,268	425,666	319,172	312,439
Nonsubject sources	Quantity	2,006,277	1,891,486	1,591,501	1,219,354	1,128,572
All import sources	Quantity	2,224,066	2,175,405	1,996,326	1,522,414	1,441,475
All sources	Quantity	3,078,888	3,037,155	2,798,054	2,131,732	1,995,044
U.S. producers	Share	27.8	28.4	28.7	28.6	27.7
India	Share	7.1	9.3	14.5	14.2	15.7
Brazil	Share	7.7	7.4	6.6	6.9	5.3
Italy	Share	12.6	12.4	10.7	10.7	11.5
Mexico	Share	11.7	11.9	11.9	12.1	10.9
Spain	Share	16.0	14.2	12.4	12.6	13.1
All other sources	Share	17.2	16.3	15.2	15.0	15.7
Nonsubject sources	Share	65.2	62.3	56.9	57.2	56.6
All import sources	Share	72.2	71.6	71.3	71.4	72.3
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Figure 4.3 Ceramic tile: Apparent U.S. consumption based on quantity, by source and period



Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Value

Table 4.13 and figure 4.4 present data on apparent U.S. consumption and U.S. market shares by value for ceramic tile. Apparent U.S. consumption, by value, fluctuated year to year between 2021 and 2023, increasing from 2021 to 2022 then decreasing more noticeably from 2022 to 2023, ending 4.3 percent higher, but was 7.0 percent lower in January to September 2024 than in January to September 2023. The year-to-year fluctuation in the value of apparent consumption largely reflects the changes in U.S. producers' U.S. shipments and U.S. shipments of imports from nonsubject sources.

During 2021 to 2023, U.S. producers' market share increased by 1.1 percentage points, and was 0.3 percentage points higher in January to September 2024 than in January to September 2023. The market share of U.S. shipments of imports from India increased by 2.2 percentage points from 2021 to 2023 and was 0.7 percentage points lower in January to

September 2024 than in January to September 2023. The market share of U.S. shipments of imports from nonsubject sources decreased by 3.4 percentage points from 2021 to 2023, and was 1.0 percentage points lower in January to September 2024 than in January to September 2023.

Table 4.13 Ceramic tile: Apparent U.S. consumption and market shares based on value, by source and period

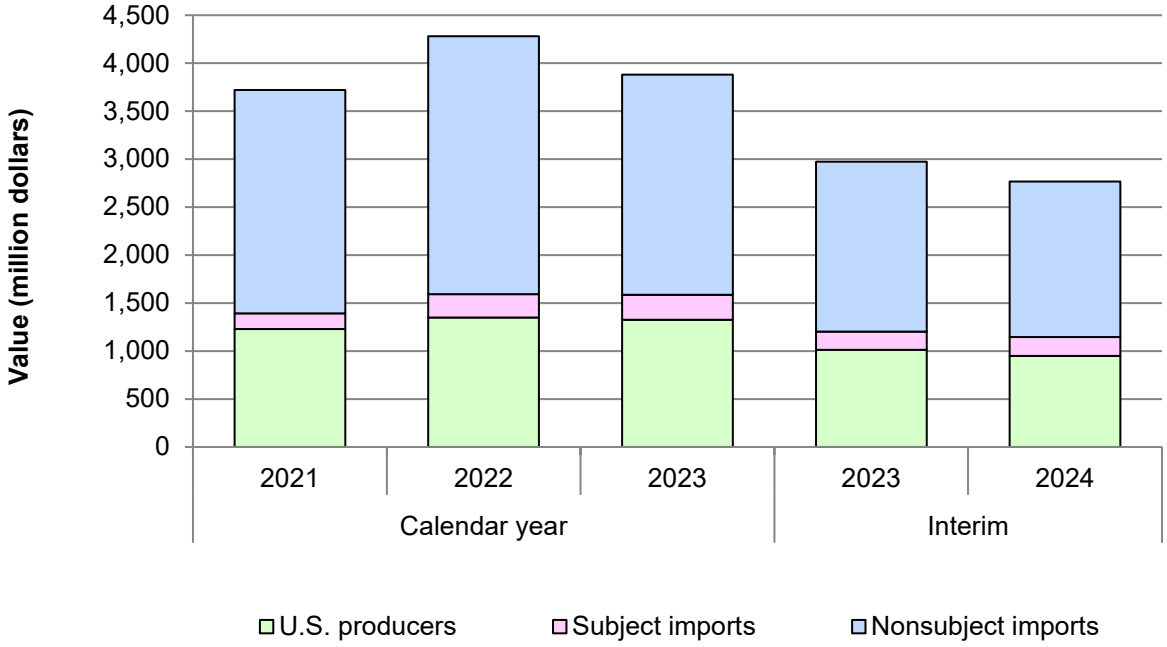
Value in 1,000 dollars; shares in percent; interim is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Value	1,229,590	1,347,628	1,326,004	1,010,830	948,519
India	Value	164,529	246,368	258,718	191,715	198,005
Brazil	Value	170,007	192,180	160,678	126,426	92,853
Italy	Value	787,996	885,957	719,674	552,963	527,531
Mexico	Value	244,140	266,570	289,286	220,448	200,114
Spain	Value	631,289	786,817	658,138	515,158	464,946
All other sources	Value	494,012	555,371	468,157	356,425	334,651
Nonsubject sources	Value	2,327,443	2,686,895	2,295,933	1,771,419	1,620,095
All import sources	Value	2,491,972	2,933,264	2,554,650	1,963,134	1,818,099
All sources	Value	3,721,562	4,280,892	3,880,654	2,973,964	2,766,618
U.S. producers	Share	33.0	31.5	34.2	34.0	34.3
India	Share	4.4	5.8	6.7	6.4	7.2
Brazil	Share	4.6	4.5	4.1	4.3	3.4
Italy	Share	21.2	20.7	18.5	18.6	19.1
Mexico	Share	6.6	6.2	7.5	7.4	7.2
Spain	Share	17.0	18.4	17.0	17.3	16.8
All other sources	Share	13.3	13.0	12.1	12.0	12.1
Nonsubject sources	Share	62.5	62.8	59.2	59.6	58.6
All import sources	Share	67.0	68.5	65.8	66.0	65.7
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

Figure 4.4 Ceramic tile: Apparent U.S. consumption based on value, by source and period



Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Tables 4.12, 4.13 and figure 4.4 present data on monthly U.S. producers' U.S. shipments, U.S. imports, and market share of ceramic tile.

Table 4.14 Ceramic tile: U.S producers' U.S. shipments and U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	U.S. producers	India	Brazil	Italy	Mexico
2021	January	74,782	24,972	18,362	28,265	30,373
2021	February	58,995	21,752	17,117	22,603	29,266
2021	March	74,914	20,991	19,563	23,607	36,459
2021	April	85,534	15,277	18,576	34,644	32,872
2021	May	68,375	21,755	19,311	28,847	29,459
2021	June	73,535	14,698	20,923	40,941	34,118
2021	July	77,738	13,640	18,364	42,566	29,311
2021	August	66,930	20,876	15,505	40,154	29,123
2021	September	65,768	15,030	20,494	33,019	28,283
2021	October	80,253	19,376	21,852	28,076	29,290
2021	November	65,765	14,089	20,830	29,784	25,941
2021	December	62,233	15,333	25,676	34,995	24,502
2022	January	68,774	18,555	19,880	25,936	24,495
2022	February	69,534	16,245	12,357	24,906	24,736
2022	March	77,031	26,870	18,969	31,917	32,537
2022	April	82,831	13,049	18,251	27,587	28,623
2022	May	68,002	26,520	19,969	36,916	29,664
2022	June	72,550	23,490	21,374	35,378	31,777
2022	July	73,450	34,409	24,065	32,581	31,131
2022	August	71,728	27,074	20,490	43,980	34,220
2022	September	66,419	33,152	21,848	29,892	30,777
2022	October	80,845	24,298	23,023	31,687	31,667
2022	November	65,562	22,224	11,966	28,619	30,819
2022	December	65,024	18,033	13,506	26,993	32,071

Table continued.

Table 4.14 (Continued) Ceramic tile: U.S producers' U.S. shipments and U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	Spain	Nonsubject sources	All import sources	All sources
2021	January	35,941	160,695	185,667	260,449
2021	February	31,987	140,468	162,220	221,215
2021	March	37,617	160,951	181,942	256,856
2021	April	40,325	167,621	182,898	268,432
2021	May	38,221	162,680	184,435	252,810
2021	June	44,577	183,634	198,332	271,867
2021	July	51,609	186,409	200,049	277,787
2021	August	46,435	177,212	198,088	265,018
2021	September	38,965	162,616	177,646	243,414
2021	October	44,270	165,920	185,296	265,549
2021	November	36,706	160,130	174,219	239,984
2021	December	46,135	177,941	193,274	255,507
2022	January	35,640	143,516	162,070	230,844
2022	February	39,334	138,166	154,411	223,945
2022	March	37,514	161,261	188,131	265,162
2022	April	28,835	146,012	159,061	241,892
2022	May	31,501	165,119	191,639	259,641
2022	June	42,703	177,625	201,115	273,665
2022	July	50,147	183,163	217,571	291,021
2022	August	51,414	200,043	227,117	298,845
2022	September	38,317	160,172	193,324	259,743
2022	October	25,582	157,821	182,119	262,964
2022	November	26,091	130,817	153,041	218,603
2022	December	23,537	127,773	145,806	210,830

Table continued.

Table 4.14 (Continued) Ceramic tile: U.S producers' U.S. shipments and U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	U.S. producers	India	Brazil	Italy	Mexico
2023	January	69,155	37,646	11,185	22,356	33,102
2023	February	65,745	26,070	23,829	20,691	32,746
2023	March	69,243	22,758	11,028	23,508	32,853
2023	April	74,755	26,890	12,943	21,979	28,039
2023	May	70,802	41,560	17,676	26,633	29,427
2023	June	68,950	40,795	18,263	27,247	25,420
2023	July	70,775	29,722	20,985	28,776	22,882
2023	August	65,663	34,981	16,531	31,114	26,055
2023	September	62,692	42,639	14,530	24,968	26,852
2023	October	73,692	32,782	13,929	21,849	29,771
2023	November	56,384	37,024	9,682	23,710	23,811
2023	December	54,119	31,959	14,053	26,053	23,366
2024	January	60,790	31,335	13,663	24,461	23,513
2024	February	61,312	26,174	10,092	19,399	24,223
2024	March	61,358	32,021	9,229	22,767	24,937
2024	April	70,021	38,372	12,678	26,097	26,795
2024	May	60,233	42,771	11,997	29,969	23,515
2024	June	60,722	50,681	13,901	29,080	19,013
2024	July	64,190	43,190	12,546	29,667	23,572
2024	August	58,688	22,628	11,099	20,624	27,304
2024	September	56,667	25,732	11,456	26,967	25,415

Table continued.

Table 4.14 (Continued) Ceramic tile: U.S producers' U.S. shipments and U.S. imports, by year, by month, and by source

Quantity in 1,000 square feet

Year	Month	Spain	Nonsubject sources	All import sources	All sources
2023	January	20,348	122,901	160,547	229,702
2023	February	33,270	145,376	171,446	237,191
2023	March	27,001	127,843	150,601	219,844
2023	April	24,820	117,277	144,168	218,923
2023	May	29,645	134,908	176,468	247,270
2023	June	36,860	150,498	191,293	260,243
2023	July	37,211	149,394	179,116	249,891
2023	August	33,354	143,475	178,456	244,119
2023	September	26,055	127,682	170,320	233,012
2023	October	26,361	129,140	161,922	235,614
2023	November	22,764	114,854	151,878	208,262
2023	December	30,305	128,154	160,112	214,231
2024	January	25,917	116,967	148,301	209,091
2024	February	24,430	108,666	134,840	196,152
2024	March	28,202	112,107	144,128	205,486
2024	April	25,813	122,780	161,152	231,173
2024	May	33,674	140,369	183,140	243,373
2024	June	32,919	128,484	179,165	239,887
2024	July	35,923	143,089	186,279	250,469
2024	August	28,975	126,437	149,066	207,754
2024	September	26,304	129,672	155,404	212,071

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Table 4.15 Ceramic tile: Market share, by month and source

Quantity in 1,000 square feet

Year	Month	U.S. producers	India	Brazil	Italy	Mexico
2021	January	28.7	9.6	7.1	10.9	11.7
2021	February	26.7	9.8	7.7	10.2	13.2
2021	March	29.2	8.2	7.6	9.2	14.2
2021	April	31.9	5.7	6.9	12.9	12.2
2021	May	27.0	8.6	7.6	11.4	11.7
2021	June	27.0	5.4	7.7	15.1	12.5
2021	July	28.0	4.9	6.6	15.3	10.6
2021	August	25.3	7.9	5.9	15.2	11.0
2021	September	27.0	6.2	8.4	13.6	11.6
2021	October	30.2	7.3	8.2	10.6	11.0
2021	November	27.4	5.9	8.7	12.4	10.8
2021	December	24.4	6.0	10.0	13.7	9.6
2022	January	29.8	8.0	8.6	11.2	10.6
2022	February	31.0	7.3	5.5	11.1	11.0
2022	March	29.1	10.1	7.2	12.0	12.3
2022	April	34.2	5.4	7.5	11.4	11.8
2022	May	26.2	10.2	7.7	14.2	11.4
2022	June	26.5	8.6	7.8	12.9	11.6
2022	July	25.2	11.8	8.3	11.2	10.7
2022	August	24.0	9.1	6.9	14.7	11.5
2022	September	25.6	12.8	8.4	11.5	11.8
2022	October	30.7	9.2	8.8	12.1	12.0
2022	November	30.0	10.2	5.5	13.1	14.1
2022	December	30.8	8.6	6.4	12.8	15.2

Table continued.

Table 4.15 (Continued) Ceramic tile: Market share of U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	Spain	Nonsubject sources	All import sources	All sources
2021	January	13.8	61.7	71.3	100.0
2021	February	14.5	63.5	73.3	100.0
2021	March	14.6	62.7	70.8	100.0
2021	April	15.0	62.4	68.1	100.0
2021	May	15.1	64.3	73.0	100.0
2021	June	16.4	67.5	73.0	100.0
2021	July	18.6	67.1	72.0	100.0
2021	August	17.5	66.9	74.7	100.0
2021	September	16.0	66.8	73.0	100.0
2021	October	16.7	62.5	69.8	100.0
2021	November	15.3	66.7	72.6	100.0
2021	December	18.1	69.6	75.6	100.0
2022	January	15.4	62.2	70.2	100.0
2022	February	17.6	61.7	69.0	100.0
2022	March	14.1	60.8	70.9	100.0
2022	April	11.9	60.4	65.8	100.0
2022	May	12.1	63.6	73.8	100.0
2022	June	15.6	64.9	73.5	100.0
2022	July	17.2	62.9	74.8	100.0
2022	August	17.2	66.9	76.0	100.0
2022	September	14.8	61.7	74.4	100.0
2022	October	9.7	60.0	69.3	100.0
2022	November	11.9	59.8	70.0	100.0
2022	December	11.2	60.6	69.2	100.0

Table continued.

Table 4.15 (Continued) Ceramic tile: Market share of U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	U.S. producers	India	Brazil	Italy	Mexico
2023	January	30.1	16.4	4.9	9.7	14.4
2023	February	27.7	11.0	10.0	8.7	13.8
2023	March	31.5	10.4	5.0	10.7	14.9
2023	April	34.1	12.3	5.9	10.0	12.8
2023	May	28.6	16.8	7.1	10.8	11.9
2023	June	26.5	15.7	7.0	10.5	9.8
2023	July	28.3	11.9	8.4	11.5	9.2
2023	August	26.9	14.3	6.8	12.7	10.7
2023	September	26.9	18.3	6.2	10.7	11.5
2023	October	31.3	13.9	5.9	9.3	12.6
2023	November	27.1	17.8	4.6	11.4	11.4
2023	December	25.3	14.9	6.6	12.2	10.9
2024	January	29.1	15.0	6.5	11.7	11.2
2024	February	31.3	13.3	5.1	9.9	12.3
2024	March	29.9	15.6	4.5	11.1	12.1
2024	April	30.3	16.6	5.5	11.3	11.6
2024	May	24.7	17.6	4.9	12.3	9.7
2024	June	25.3	21.1	5.8	12.1	7.9
2024	July	25.6	17.2	5.0	11.8	9.4
2024	August	28.2	10.9	5.3	9.9	13.1
2024	September	26.7	12.1	5.4	12.7	12.0

Table continued.

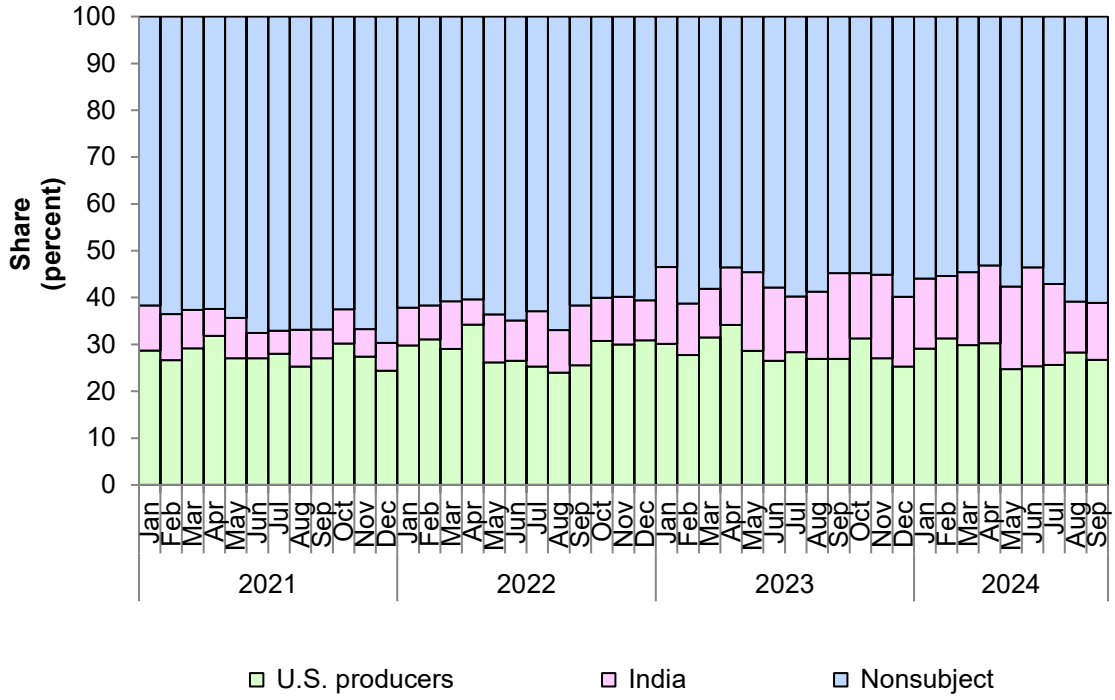
Table 4.15 (Continued) Ceramic tile: Market share of U.S. imports, by month and source

Quantity in 1,000 square feet

Year	Month	Spain	Nonsubject sources	All import sources	All sources
2023	January	8.9	53.5	69.9	100.0
2023	February	14.0	61.3	72.3	100.0
2023	March	12.3	58.2	68.5	100.0
2023	April	11.3	53.6	65.9	100.0
2023	May	12.0	54.6	71.4	100.0
2023	June	14.2	57.8	73.5	100.0
2023	July	14.9	59.8	71.7	100.0
2023	August	13.7	58.8	73.1	100.0
2023	September	11.2	54.8	73.1	100.0
2023	October	11.2	54.8	68.7	100.0
2023	November	10.9	55.1	72.9	100.0
2023	December	14.1	59.8	74.7	100.0
2024	January	12.4	55.9	70.9	100.0
2024	February	12.5	55.4	68.7	100.0
2024	March	13.7	54.6	70.1	100.0
2024	April	11.2	53.1	69.7	100.0
2024	May	13.8	57.7	75.3	100.0
2024	June	13.7	53.6	74.7	100.0
2024	July	14.3	57.1	74.4	100.0
2024	August	13.9	60.9	71.8	100.0
2024	September	12.4	61.1	73.3	100.0

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Figure 4.5 Ceramic tile: Monthly market share of U.S. imports from U.S. producers, India, and nonsubject sources, by source and month



Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series.

Table 4.16 through 4.20 present U.S. producers' and U.S. importers' U.S. shipments by channels of distribution.

Table 4.16 Ceramic tile: U.S. producers' and U.S. importers' U.S. shipments to distributors, by source and period

Quantity in 1,000 square feet; share in percent; ratio in percent relative to overall consumption quantity; Interim period is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Brazil	Share of quantity	***	***	***	***	***
Italy	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Spain	Share of quantity	***	***	***	***	***
All other sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
All sources	Share of quantity	***	***	***	***	***
U.S. producers	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Apparent U.S. consumption used in the ratio is based on U.S. producers U.S. shipments from questionnaire data and official U.S. imports statistics.

Table 4.17 Ceramic tile: U.S. producers' and U.S. importers' U.S. shipments to big box retailers, by source and period

Quantity in 1,000 square feet; share in percent; ratio in percent relative to overall consumption quantity; Interim period is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Brazil	Share of quantity	***	***	***	***	***
Italy	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Spain	Share of quantity	***	***	***	***	***
All other sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
All sources	Share of quantity	***	***	***	***	***
U.S. producers	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Ratio calculated as the quantity controlled by U.S. producers based on questionnaire data relative to U.S. imports statistics as shown in table IV-2.

Table 4.18 Ceramic tile: U.S. producers' and U.S. importers' U.S. shipments to other retailers, by source and period

Quantity in 1,000 square feet; share in percent; ratio in percent relative to overall consumption quantity; Interim period is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Brazil	Share of quantity	***	***	***	***	***
Italy	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Spain	Share of quantity	***	***	***	***	***
All other sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
All sources	Share of quantity	***	***	***	***	***
U.S. producers	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Ratio calculated as the quantity controlled by U.S. producers based on questionnaire data relative to U.S. imports statistics as shown in table IV-2.

Table 4.19 Ceramic tile: U.S. producers' and U.S. importers' U.S. shipments to contractors and builders, by source and period

Quantity in 1,000 square feet; share in percent; ratio in percent relative to overall consumption quantity; Interim period is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Brazil	Share of quantity	***	***	***	***	***
Italy	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Spain	Share of quantity	***	***	***	***	***
All other sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
All sources	Share of quantity	***	***	***	***	***
U.S. producers	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Ratio calculated as the quantity of U.S. producers U.S. shipments based on questionnaire data and U.S. imports based on statistics as shown in table IV-2.

Table 4.20 Ceramic tile: U.S. producers' and U.S. importers' U.S. shipments to other end users, by source and period

Quantity in 1,000 square feet; share in percent; ratio in percent relative to overall consumption quantity; Interim period is January through September

Source	Measure	2021	2022	2023	Interim 2023	Interim 2024
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Brazil	Quantity	***	***	***	***	***
Italy	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Spain	Quantity	***	***	***	***	***
All other sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Brazil	Share of quantity	***	***	***	***	***
Italy	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Spain	Share of quantity	***	***	***	***	***
All other sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
All sources	Share of quantity	***	***	***	***	***
U.S. producers	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Brazil	Ratio	***	***	***	***	***
Italy	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Spain	Ratio	***	***	***	***	***
All other sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". Ratio calculated as the quantity controlled by U.S. producers based on questionnaire data relative to U.S. imports statistics as shown in table IV-2.

Part 5: Pricing data

Factors affecting prices

Raw material costs

All ceramic tile is made from a mixture of the same inputs: primarily clay, minerals, sand, feldspar, and other raw materials. Among the various types of clays, kaolin and ball clay are the predominant types used in ceramic tile production; the production of tile also uses silicate mineral additives such as feldspar, nepheline, granite, pyrophyllite, wollastonite, and talc. The producer price index for kaolin and ball clay increased by 7.5 percent between January 2021 and December 2022 (the last available data), and the index for crushed granite (a quartz-rich igneous rock) rose between January 2021 and September 2024 by 30.5 percent (tables 5.1 and 5.2 and figure 5.1). The majority of U.S. producers and importers reported that raw material costs had steadily increased or fluctuated up since January 1, 2021. U.S. producers and importers generally reported that increases in raw material costs have reduced their profit margins. Importer *** reported that the cost of Felspar is up 30 percent and cobalt and zircon have fluctuated and then stabilized. Raw materials as a share of cost of goods sold were constant throughout the period.

Figure 5.1 Ceramic tile: Monthly crushed and broken granite mining price index, not seasonally adjusted, January 2021 through September 2024

Index in percent; January 2021 = 100.0; NA = not available

Month	2021	2022	2023	2024
January	100.0	107.2	125.5	128.4
February	98.5	107.4	125.5	127.9
March	102.1	107.9	125.5	129.2
April	101.0	110.4	128.5	127.0
May	101.1	112.4	127.4	125.4
June	102.5	113.6	129.2	127.3
July	103.0	113.5	124.2	128.0
August	103.7	113.7	124.5	129.0
September	103.4	114.3	124.0	130.5
October	103.6	115.5	123.8	NA
November	104.1	113.6	124.4	NA
December	104.1	114.2	124.2	NA

Source: U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Crushed and Broken Granite Mining (PCU212313212313) and Kaolin and Ball Clay Mining: Primary Products (PCU212324212324P), retrieved from FRED, Federal Reserve Bank of St. Louis; https://fred.stlouisfed.org/series/, accessed Feb 12, 2025.

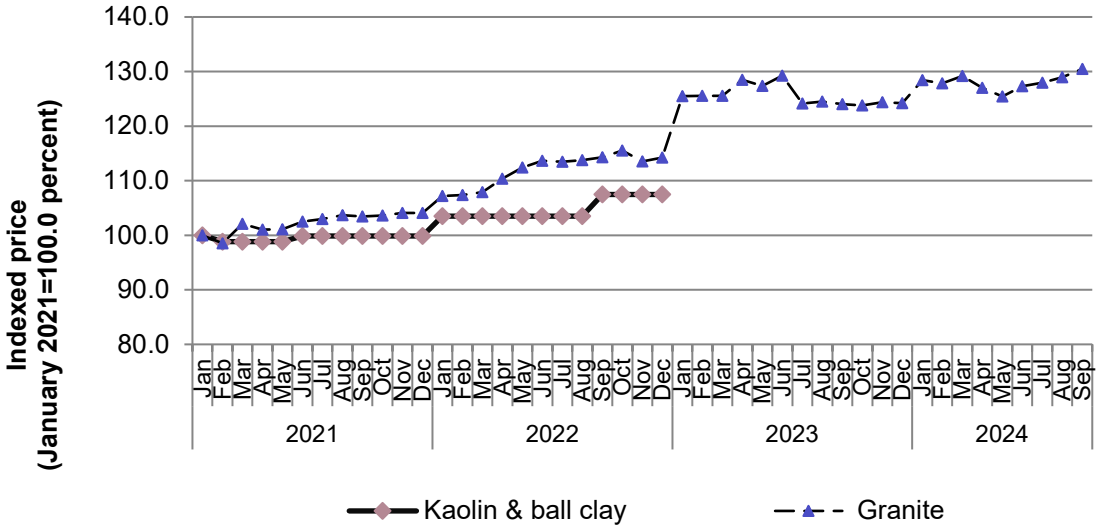
Table 5.2 Ceramic tile: Monthly kaolin and ball clay price index, not seasonally adjusted, January 2021 through December 2022

Index in percent; January 2021 = 100.0

Month	2021	2022
January	100.0	103.5
February	98.8	103.5
March	98.8	103.5
April	98.8	103.5
May	98.8	103.5
June	99.9	103.5
July	99.9	103.5
August	99.9	103.5
September	99.9	107.5
October	99.9	107.5
November	99.9	107.5
December	99.9	107.5

Source: U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Crushed and Broken Granite Mining (PCU212313212313) and Kaolin and Ball Clay Mining: Primary Products (PCU212324212324P), retrieved from FRED, Federal Reserve Bank of St. Louis; https://fred.stlouisfed.org/series/, accessed Feb 12, 2025.

Figure 5.1 Ceramic tile: Monthly kaolin and ball clay mining price index and crushed and broken granite mining price index, not seasonally adjusted, January 2021 to September 2024



Source: U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Crushed and Broken Granite Mining (PCU212313212313) and Kaolin and Ball Clay Mining: Primary Products (PCU212324212324P), retrieved from FRED, Federal Reserve Bank of St. Louis; https://fred.stlouisfed.org/series/,, accessed Feb 12, 2025.

Transportation costs to the U.S. market

Transportation costs for ceramic tile shipped from India to the United States averaged 19.8 percent during 2023. These estimates were derived from official import data and represent the transportation and other charges on imports.[1]

U.S. inland transportation costs

The majority of responding U.S. producers and importers reported that purchasers arrange transportation. Most U.S. producers reported that their U.S. inland transportation costs ranged from 9.0 to 30.0 percent while most importers reported costs of 4.0 to 25.0 percent.

Pricing practices

Pricing methods

U.S. producers and importers reported setting prices using transaction-by-transaction, contracts, and price lists (table 5.3). One importer *** reported using cost plus methods to set prices for ceramic tiles.

Table 5.3 Ceramic tile: Count of U.S. producers' and importers' reported price setting methods

Count in number of firms reporting

Method	U.S. producers	Importers
Transaction-by-transaction	5	9
Contract	4	5
Set price list	10	13
Other	0	1
Responding firms	10	18

Source: Compiled from data submitted in response to Commission questionnaires.

Note: The sum of responses down may not add up to the total number of responding firms as each firm was instructed to check all applicable price setting methods employed.

[1] The estimated transportation costs were obtained by subtracting the customs value from the c.i.f. value of the imports for 2023 and then dividing by the customs value based on the HTS statistical reporting number 6907.10.0000, 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, 6907.40.9051, 6907.90.0011, 6907.90.0051, 6908.10.1000, 6908.10.2000, 6908.10.5000, 6908.90.0011, and 6908.90.0051.

U.S. producers and importers reported selling most of their ceramic tile in the spot market (table 5.4).

Table 5.4 Ceramic tile: U.S. producers' and importers' shares of commercial U.S. shipments by type of sale, 2023

Share in percent

Type of sale	U.S. producers	Subject importers
Long-term contracts	***	***
Annual contracts	***	***
Short-term contracts	***	***
Spot sales	***	***
Total	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Because of rounding, figures may not add to the totals shown.

The majority of U.S. producers reported fixing both price and quantities in short-term contracts and that they do not renegotiate these prices or index prices to raw materials. The majority of responding U.S. producers reported that they fix prices for annual and long-term contracts and do not renegotiate prices or index them to raw materials. U.S. producers reported that long-term contracts typically last between 2 and 3 years.

The sole importer that reported selling ceramic tiles under short-term contracts reported that it fixed both price and quantity and did not renegotiate prices. Both importers that reported selling under annual contracts reported that they fix and renegotiated prices but did not index them to raw materials.

Sales terms and discounts

U.S. producers and importers typically quote prices on an f.o.b. basis. Four U.S. producers reported offering quantity discounts, four reported total volume discounts, and five reported other discounts. U.S. producers reported that other discounts included discounts for discontinued items, discretionary discounts, and discounts that were based on the purchasing relationship with a specific customer. Eight importers reported offering quantity discounts, three reported total volume discounts, and six reported other discounts. Importers reported that other discounts included discounts that were based on the purchasing relationship with a specific customer and discounts to match the price offered by a competitor.

Price leadership

Six purchasers reported that there were no price leaders in the ceramic tile market, while three purchasers reported that U.S. producer Dal Tile was a leader and one purchaser

each reported that importers M S International, Portobello, and Anatolia were price leaders. Purchasers indicating the presence of price leaders indicated that these price leaders led by setting prices that cause other firms to change theirs and having the lowest prices in the market.

Price data

The Commission requested U.S. producers and importers to provide quarterly data for the total quantity and f.o.b. value of the following ceramic tile products shipped to unrelated U.S. customers during January 2021 to September 2024.[2]

Product 1.-- Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Product 2.-- Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Product 3.-- Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Product 4.-- Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Ten U.S. producers and eight importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters.[3] Pricing data reported by these firms accounted for approximately 29.3 percent of U.S. producers’ commercial shipments of ceramic tile, 46.2 percent of commercial shipments of subject imports from India in 2023.[4] Price data for products 1 to 4 are presented in tables 5.5 to 5.8 and figures 5.2 to 5.5. Nonsubject country prices are presented in Appendix D.

[2] Staff notes that there is a range of price points for products within the pricing data including pricing products sold within the same quarter. Staff confirmed with questionnaire respondents that these differences in price are at least partly caused by differences in finishes, artistic designs, technical characteristics, or trims (Emails from ***).

[3] Per-unit pricing data are calculated from total quantity and total value data provided by U.S. producers and importers. The precision and variation of these figures may be affected by rounding, limited quantities, and producer or importer estimates.

[4] Pricing coverage is based on U.S. shipments reported in questionnaires. No importers reported price data for product 3 imported from India.

Table 5.5 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by source and quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	India price	India quantity	India margin
2021 Q1	***	***	***	***	***
2021 Q2	***	***	***	***	***
2021 Q3	***	***	***	***	***
2021 Q4	***	***	***	***	***
2022 Q1	***	***	***	***	***
2022 Q2	***	***	***	***	***
2022 Q3	***	***	***	***	***
2022 Q4	***	***	***	***	***
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure 5.2 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, by source and quarter

Price of product 1

* * * * * * *

Volume of product 1

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table 5.6 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), by source and quarter

Price in dollars per square feet, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	India price	India quantity	India margin
2021 Q1	***	***	***	***	***
2021 Q2	***	***	***	***	***
2021 Q3	***	***	***	***	***
2021 Q4	***	***	***	***	***
2022 Q1	***	***	***	***	***
2022 Q2	***	***	***	***	***
2022 Q3	***	***	***	***	***
2022 Q4	***	***	***	***	***
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure 5.3 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, by source and quarter

Price of product 2

* * * * * * *

Volume of product 2

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table 5.7 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by source and quarter

Price in dollars per square feet, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	India price	India quantity	India margin
2021 Q1	***	***	***	***	***
2021 Q2	***	***	***	***	***
2021 Q3	***	***	***	***	***
2021 Q4	***	***	***	***	***
2022 Q1	***	***	***	***	***
2022 Q2	***	***	***	***	***
2022 Q3	***	***	***	***	***
2022 Q4	***	***	***	***	***
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 3: Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure 5.4 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 3, by source and quarter

Price of product 3

* * * * * * *

Volume of product 3

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 3: Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table 5.8 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 and margins of underselling/(overselling), by source and quarter

Price in dollars per square feet, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	India price	India quantity	India margin
2021 Q1	***	***	***	***	***
2021 Q2	***	***	***	***	***
2021 Q3	***	***	***	***	***
2021 Q4	***	***	***	***	***
2022 Q1	***	***	***	***	***
2022 Q2	***	***	***	***	***
2022 Q3	***	***	***	***	***
2022 Q4	***	***	***	***	***
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 4: Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure 5.5 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 4, by source and quarter

Price of product 4

* * * * * * *

Volume of product 4

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 4: Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Price trends

In general, prices for domestic product increased during January 2021 to September 2024. Subject import prices generally decreased over the same period. Table 5.9 summarizes the price trends, by country and by product. As shown in the table, domestic price increases ranged from *** to *** percent for products 1 through 3 while domestic prices decreased by *** percent for product 4. Subject import price decreases ranged from *** to *** percent for products 1 and 4 and increased by *** percent for product 2.

Table 5.9 Ceramic tile: Summary of price data, by product and source, January 2021 to September 2024

Quantity in square feet, price in dollars per 1,000 square feet

Product	Source	Number of quarters	Quantity of shipments	Low price	High price	First quarter price	Last quarter price	Percent change in price over period
Product 1	United States	15	***	***	***	***	***	***
Product 1	India	15	***	***	***	***	***	***
Product 2	United States	15	***	***	***	***	***	***
Product 2	India	15	***	***	***	***	***	***
Product 3	United States	15	***	***	***	***	***	***
Product 3	India	—	***	***	***	***	***	***
Product 4	United States	15	***	***	***	***	***	***
Product 4	India	15	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Percent change column is percentage change from the first quarter 2021 to the third quarter of 2024.

Figure 5.6 Ceramic tile: Indexed U.S. producers prices, by quarter

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 5.10 Ceramic tile: Indexed U.S. producers' prices, by quarter

Period	Product 1	Product 2	Product 3	Product 4
2021 Q1	100.0	100.0	100.0	100.0
2021 Q2	***	***	***	***
2021 Q3	***	***	***	***
2021 Q4	***	***	***	***
2022 Q1	***	***	***	***
2022 Q2	***	***	***	***
2022 Q3	***	***	***	***
2022 Q4	***	***	***	***
2023 Q1	***	***	***	***
2023 Q2	***	***	***	***
2023 Q3	***	***	***	***
2023 Q4	***	***	***	***
2024 Q1	***	***	***	***
2024 Q2	***	***	***	***
2024 Q3	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Figure 5.7 Ceramic tile: Indexed subject importer prices, by quarter

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 5.11 Ceramic tile: Indexed subject importer prices, by quarter

Period	Product 1	Product 2	Product 3	Product 4
2021 Q1	100.0	100.0	***	100.0
2021 Q2	***	***	***	***
2021 Q3	***	***	***	***
2021 Q4	***	***	***	***
2022 Q1	***	***	***	***
2022 Q2	***	***	***	***
2022 Q3	***	***	***	***
2022 Q4	***	***	***	***
2023 Q1	***	***	***	***
2023 Q2	***	***	***	***
2023 Q3	***	***	***	***
2023 Q4	***	***	***	***
2024 Q1	***	***	***	***
2024 Q2	***	***	***	***
2024 Q3	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—"

Price comparisons

As shown in table 5.12, prices for product imported from India were below those for U.S.-produced product in 35 of 45 instances (*** square feet); margins of underselling ranged from *** to *** percent. In the remaining 10 instances (***), prices for product from India were between *** and *** percent above prices for the domestic product. The instances and volumes of underselling increased throughout the period of investigation, while the instance and volumes of overselling decreased (table 5.13).

Table 5.12 Ceramic tile: Instances of underselling and overselling and the range and average of margins, by product

Quantity in 1,000 square feet; margin in percent

Product	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	15	***	***	***	***
Product 2	Underselling	5	***	***	***	***
Product 3	Underselling	—	***	***	***	***
Product 4	Underselling	15	***	***	***	***
Total, all products	Underselling	35	***	***	***	***
Product 1	Overselling	—	***	***	***	***
Product 2	Overselling	10	***	***	***	***
Product 3	Overselling	—	***	***	***	***
Product 4	Overselling	—	***	***	***	***
Total, all products	Overselling	10	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Table 5.13 Ceramic tile: Instances of underselling and overselling and the range and average of margins, by period

Quantity in 1,000 square feet; margin in percent

Period	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
2021	Underselling	8	***	***	***	***
2022	Underselling	9	***	***	***	***
2023	Underselling	10	***	***	***	***
January through September 2024	Underselling	8	***	***	***	***
Total, all years	Underselling	35	***	***	***	***
2021	Overselling	4	***	***	***	***
2022	Overselling	3	***	***	***	***
2023	Overselling	2	***	***	***	***
January through September 2024	Overselling	1	***	***	***	***
Total, all years	Overselling	10	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Lost sales and lost revenue

In the preliminary phase of these investigations, the Commission requested that U.S. producers of ceramic tile report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of ceramic tile from India during January 2021 to December 2023. Four U.S. producers submitted lost sales and lost revenue allegations. The four responding U.S. producers identified 29 firms with which they lost sales or revenue (21 consisting lost sales allegations and 8 consisting of both types of allegations). All allegations were made between 2022 and 2024.

In the final phase of these investigations, of the 10 responding U.S. producers, 8 reported that they had to reduce prices, 4 reported that they had to roll back announced price increases, and 9 firms reported that they had lost sales.

Staff contacted 101 purchasers and received responses from 11 purchasers.[5] Responding purchasers reported purchasing 7.4 billion square feet of ceramic tile during January 2021 to September 2024 (table 5.14).

[5] One purchaser *** submitted lost sales lost revenue survey responses in the preliminary phase, but did not submit purchaser questionnaire responses in the final phase.

Of the 11 responding purchasers, four reported that, since 2021, they had purchased imported ceramic tile from India instead of U.S.-produced product. Three of these purchasers reported that subject import prices were lower than U.S.-produced product. None of the responding purchasers reported that price was the primary reason for purchasing imports instead of domestic ceramic tile or estimated the quantity of ceramic tile from India purchased instead of domestic product (table 5.15). Purchaser *** identified trends, quality, availability, production capacity, market brand, preferences, distribution networks, service, innovation, compliance, reliability of supply, and domestic production limitations as non-price reasons for purchasing imported rather than U.S.-produced product.

Of the 11 responding purchasers, none reported that U.S. producers had reduced prices in order to compete with lower-priced imports from India; five reported that they did not know (table 5.16).

Table 5.14 Ceramic tile: Purchasers' reported purchases and imports, by firm and source

Quantity in 1,000 square feet, share in percent

Purchaser	Domestic quantity	Subject quantity	All other quantity	Change in domestic share	Change in subject country share
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
All firms	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: All other includes all other sources and unknown sources. Change is the percentage point change in the share of the firm's total purchases of domestic and/or subject country imports between first and last years.

Table 5.15 Ceramic tile: Purchasers' responses to purchasing subject imports instead of domestic product, by firm

Quantity in 1,000 square feet

Purchaser	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Explanation
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
All firms	Yes--4; No--7	Yes--3; No--1	Yes--0; No--4	***	NA

Source: Compiled from data submitted in response to Commission questionnaires.

Table 5.16 Ceramic tile: Purchasers' responses to U.S. producer price reductions, by firm

Count in number of firms reporting

Purchaser	Reported producers lowered prices	Estimated percent of U.S. price reduction	Explanation
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
All firms	Yes--0; No--6	***	NA

Source: Compiled from data submitted in response to Commission questionnaires.

Part 6: Financial experience of U.S. producers

Background[1]

Ten U.S. producers (AHF (Crossville Brand), American Wonder, Dal-Tile, Del Conca, Florida Tile, Florim, Ironrock, Landmark, Portobello and Stonepeak) provided usable financial results on their ceramic tile operations.[2] [3] All U.S. producers reported financial data on a calendar year basis, and on the basis of GAAP. ***.[4] [5]

Figure 6.1 presents each responding firm's share of the total reported net sales quantity in 2023.

[1] The following abbreviations are used in the tables and/or text of this section: generally accepted accounting principles ("GAAP"), fiscal year ("FY"), net sales ("NS"), cost of goods sold ("COGS"), selling, general, and administrative expenses ("SG&A expenses"), average unit values ("AUVs"), research and development expenses ("R&D expenses"), and return on assets ("ROA").

[2] ***. *** U.S. producer questionnaire response, section 2.2a.

[3] ***. *** U.S. producer questionnaire response, section 2.2a.

[4] Dal-Tile is owned by Mohawk Industries Group and operates within the Global Ceramic business segment. The Global Ceramic business segment accounted for 39.0 percent of Mohawk's total revenue in 2023. Mohawk's 2023 Form 10-K report, p.3 (as filed).

[5] Staff conducted a verification of Dal-Tile's trade and financial data. The company's U.S. producer questionnaire response included revisions to the following items: ***. All adjustments were incorporated into this report. Staff verification report, Dal-Tile, April 21, 2025.

Figure 6.1 Ceramic tile: U.S. producers' share of net sales quantity in 2023, by firm

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Operations on ceramic tile

Table 6.1 presents aggregated data on U.S. producers' operations in relation to ceramic tile, while table 6.2 presents corresponding changes in AUVs. Table 6.3 presents selected company-specific financial data.

Table 6.1 Ceramic tile: U.S. producers' results of operations, by item and period

Quantity in 1,000 of square feet; value in 1,000 dollars; ratios in percent; interim is January to September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
Total net sales	Quantity	866,230	876,769	816,288	620,875	563,744
Total net sales	Value	1,248,994	1,374,332	1,353,998	1,031,808	969,680
COGS: Raw materials	Value	255,168	305,081	304,717	242,119	223,428
COGS: Direct labor	Value	111,203	122,123	131,525	102,116	107,498
COGS: Other factory	Value	461,697	498,567	486,937	379,785	351,225
COGS: Total	Value	828,068	925,771	923,179	724,020	682,151
Gross profit or (loss)	Value	420,926	448,561	430,819	307,788	287,529
SG&A expenses	Value	352,151	383,519	402,386	301,475	300,232
Operating income or (loss)	Value	68,775	65,042	28,433	6,313	(12,703)
Other expense / (income), net	Value	14,408	14,037	32,422	26,239	34,582
Net income or (loss)	Value	54,367	51,005	(3,989)	(19,926)	(47,285)
Depreciation/amortization	Value	118,918	109,237	100,624	76,156	82,168
Cash flow	Value	173,285	160,242	96,635	56,230	34,883
COGS: Raw materials	Ratio to NS	20.4	22.2	22.5	23.5	23.0
COGS: Direct labor	Ratio to NS	8.9	8.9	9.7	9.9	11.1
COGS: Other factory	Ratio to NS	37.0	36.3	36.0	36.8	36.2
COGS: Total	Ratio to NS	66.3	67.4	68.2	70.2	70.3
Gross profit	Ratio to NS	33.7	32.6	31.8	29.8	29.7
SG&A expense	Ratio to NS	28.2	27.9	29.7	29.2	31.0
Operating income or (loss)	Ratio to NS	5.5	4.7	2.1	0.6	(1.3)
Net income or (loss)	Ratio to NS	4.4	3.7	(0.3)	(1.9)	(4.9)

Table continued.

Table 6.1 (Continued) Ceramic tile: U.S. producers' results of operations, by item and period

Shares in percent; unit values in dollars per square foot; count in number of firms reporting; interim is January to September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
COGS: Raw materials	Share	30.8	33.0	33.0	33.4	32.8
COGS: Direct labor	Share	13.4	13.2	14.2	14.1	15.8
COGS: Other factory	Share	55.8	53.9	52.7	52.5	51.5
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Total net sales	Unit value	1.44	1.57	1.66	1.66	1.72
COGS: Raw materials	Unit value	0.29	0.35	0.37	0.39	0.40
COGS: Direct labor	Unit value	0.13	0.14	0.16	0.16	0.19
COGS: Other factory	Unit value	0.53	0.57	0.60	0.61	0.62
COGS: Total	Unit value	0.96	1.06	1.13	1.17	1.21
Gross profit or (loss)	Unit value	0.49	0.51	0.53	0.50	0.51
SG&A expenses	Unit value	0.41	0.44	0.49	0.49	0.53
Operating income or (loss)	Unit value	0.08	0.07	0.03	0.01	(0.02)
Net income or (loss)	Unit value	0.06	0.06	(0.00)	(0.03)	(0.08)
Operating losses	Count	3	5	6	6	7
Net losses	Count	3	5	7	6	8
Data	Count	9	9	10	10	10

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares represent the share of COGS. Shares and ratios shown as "0.00" represent values greater than zero, but less than "0.005" percent. Negative values are shown in parentheses.

Table 6.2 Ceramic tile: Changes in AUVs between comparison periods

Changes in percent; interim is January to September

Item	2021–23	2021–22	2022–23	Interim 2023–24
Total net sales	▲15.0	▲8.7	▲5.8	▲3.5
COGS: Raw materials	▲26.7	▲18.1	▲7.3	▲1.6
COGS: Direct labor	▲25.5	▲8.5	▲15.7	▲15.9
COGS: Other factory	▲11.9	▲6.7	▲4.9	▲1.9
COGS: Total	▲18.3	▲10.5	▲7.1	▲3.8

Table continued.

Table 6.2 (Continued) Ceramic tile: Changes in AUVs between comparison periods

Changes in dollars per square foot; interim is January to September

Item	2021–23	2021–22	2022–23	Interim 2023–24
Total net sales	▲0.22	▲0.13	▲0.09	▲0.06
COGS: Raw materials	▲0.08	▲0.05	▲0.03	▲0.01
COGS: Direct labor	▲0.03	▲0.01	▲0.02	▲0.03
COGS: Other factory	▲0.06	▲0.04	▲0.03	▲0.01
COGS: Total	▲0.18	▲0.10	▲0.08	▲0.04
Gross profit or (loss)	▲0.04	▲0.03	▲0.02	▲0.01
SG&A expense	▲0.09	▲0.03	▲0.06	▲0.05
Operating income or (loss)	▼(0.04)	▼(0.01)	▼(0.04)	▼(0.03)
Net income or (loss)	▼(0.07)	▼(0.00)	▼(0.06)	▼(0.05)

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Percentages and unit values shown as "0.00" represent values greater than zero, but less than "0.005," respectively. Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

Table 6.3 Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales quantity

Quantity in 1,000 of square feet; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	866,230	876,769	816,288	620,875	563,744

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales value

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	1,248,994	1,374,332	1,353,998	1,031,808	969,680

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

COGS

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	828,068	925,771	923,179	724,020	682,151

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Gross profit or (loss)

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	420,926	448,561	430,819	307,788	287,529

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

SG&A expenses

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	352,151	383,519	402,386	301,475	300,232

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Operating income or (loss)

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	68,775	65,042	28,433	6,313	(12,703)

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net income or (loss)

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	54,367	51,005	(3,989)	(19,926)	(47,285)

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

COGS to net sales ratio

Ratios in percent; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	66.3	67.4	68.2	70.2	70.3

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Gross profit or (loss) to net sales ratio

Ratios in percent; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	33.7	32.6	31.8	29.8	29.7

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

SG&A expenses to net sales ratio

Ratios in percent; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	28.2	27.9	29.7	29.2	31.0

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Operating income or (loss) to net sales ratio

Ratios in percent; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	5.5	4.7	2.1	0.6	(1.3)

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net income or (loss) to net sales ratio

Ratios in percent; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	4.4	3.7	(0.3)	(1.9)	(4.9)

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit net sales value

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	1.44	1.57	1.66	1.66	1.72

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit raw material costs

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.29	0.35	0.37	0.39	0.40

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit direct labor costs

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.13	0.14	0.16	0.16	0.19

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit other factory costs

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.53	0.57	0.60	0.61	0.62

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit COGS

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.96	1.06	1.13	1.17	1.21

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit gross profit or (loss)

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.49	0.51	0.53	0.50	0.51

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit SG&A expenses

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.41	0.44	0.49	0.49	0.53

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit operating income or (loss)

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.08	0.07	0.03	0.01	(0.02)

Table continued.

Table 6.3 (Continued) Ceramic tile: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit net income or (loss)

Unit values in dollars per square foot; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	0.06	0.06	(0.00)	(0.03)	(0.08)

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.00" represent values greater than zero, but less than "0.005" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—". Negative values are shown in parentheses.

Net sales

Total revenue consists primarily of commercial sales, four U.S. producers reported internal consumption and two reported transfers to related firms. Noncommercial sales accounted for less than 1.5 percent of total revenue from 2021 to 2023, and are included in the financial data, but not shown separately in this section of the report.[6] [7]

As shown in table 6.1, both total net sales quantity and value increased from 2021 to 2022, then decreased from 2022 to 2023, and were lower in interim 2024 compared with interim 2023. Overall, total net sales quantity decreased by 5.8 percent from 2021 to 2023, while total net sales value increased by 8.4 percent during that same period (total net sales value increased at a higher rate than quantity from 2021 to 2022 affecting its overall trend). As shown in table 6.3, *** U.S. producers that operated continuously throughout the reporting period showed an overall decrease in sales quantity from 2021 to 2023, and *** showed an overall increase in sales value from 2021 to 2023 (with the majority of the increase occurring from 2021 to 2022).[8] In the comparable interim periods, *** U.S. producers that operated continuously throughout the reporting period showed lower

[6] ***. While some items reported are not internal consumption as defined by the Commission, the items are immaterial to reported profitability. All internal consumption was reported at fair market value. ***. Transfers to related firms were reported at fair market value. *** U.S. producers questionnaire response, section 2-13. Email from ***, May 14, 2024, email from ***, May 15, 2024, email from ***, May 13, 2024, and email from ***, March 7, 2025.

[7] ***. U.S. producers questionnaire responses of ***, section 2-6, and emails from ***, ***, May 9, 2024, and May 14, 2024, respectively.

[8] ***. Email from ***, May 9, 2024.

sales quantity in interim 2024 compared with interim 2023, and *** reported lower sales values.[9] On an average per square foot basis, sales value increased from $1.44 in 2021 to $1.66 in 2023, and was higher in interim 2024 at $1.72 compared with interim 2023 at $1.66. *** U.S. producers that operated continuously throughout the reporting period had an overall increase in their per-square foot values from 2021 to 2023, and *** reported higher per-square foot values in interim 2024 compared with interim 2023. In 2023, the average per-square foot value ranged from a low of $*** reported by *** to a high of $*** reported by ***. Variations in per-square foot values may be explained by the differences in product mix and the size of the U.S. producer (see table 6.3).[10] [11]

Cost of goods sold and gross profit or loss

Raw material costs, direct labor costs, and other factory costs accounted for 33.0, 14.2, and 52.7 percent of total COGS, respectively, in 2023 (see table 6.1).

As shown in table 6.1, raw material costs, the second largest component of COGS in all years in which data were collected, increased irregularly by 19.4 percent from 2021 to 2023, and were 7.7 percent lower in interim 2024 compared with interim 2023. On an average per square foot basis, raw material costs increased from $0.29 in 2021 to $0.37 in 2023, and were somewhat higher in interim 2024 at $0.40 compared with interim 2023 at $0.39.[12] Directional trends were overall uniform between U.S. producers that operated continuously throughout the reporting period from 2021 to 2023, and were less uniform in the comparable interim

[9] ***. Email from ***, February 17, 2024.

[10] *** Email from ***, May 14, 2024.

[11] *** Email from ***, May 15, 2024.

[12] Petitioners indicated that in addition to inflation impacting the cost of raw materials, a large part of the increase is attributable to the transportation costs of those raw materials. Conference transcript, p.54 (Caselli)

periods (see table 6.3).[13] As a ratio to net sales, raw material costs increased from 20.4 percent in 2021 to 22.5 percent in 2023, and were somewhat lower in interim 2024 at 23.0 percent compared with interim 2023 at 23.5 percent.

Table 6.4 presents details on specific raw material inputs as a share of raw material costs in 2023. The table shows that clay is the primary raw material input for ceramic tile accounting for 38.2 percent, followed by glazing, decorating, and other surfacing material accounting for 23.9 percent, then silica, feldspar, and other minerals accounting for 22.3 percent. The remaining 15.7 percent is accounted for by all other material inputs such as ***.[14]

Table 6.4 Ceramic tile: U.S. producers' raw material costs in 2023

Value in 1,000 dollars; share of value in percent

Item	Value	Share of value
Clay	116,313	38.2
Glazing, decorating, and other surfacing materials	72,790	23.9
Silica, feldspar, and other mineral	67,802	22.3
Other material inputs	47,812	15.7
All raw materials	304,717	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

As shown in table 6.1, direct labor costs, the smallest component of COGS in all years in which data were collected, increased overall by 18.3 percent from 2021 to 2023, and were 5.3 percent higher in interim 2024 compared with interim 2023.[15] [16] On an average per square foot basis, direct labor costs increased from $0.13 in 2021 to $0.16 in 2023, and were higher in interim 2024 at $0.19 compared with interim 2023 at $0.16. Directional trends were overall uniform between U.S. producers that operated continuously throughout the reporting period

[13] ***. Email from ***, May 13, 2024.

[14] ***. Inputs were reported in manner consistent with the company's accounting books and records. *** U.S. producers questionnaire responses sections, 3.6, 3.7a, and 3.7b.

[15] Petitioners explained that the use of labor in the manufacturing process of ceramic tile is minimal because the process is highly automated. Conference transcript. p. 61 (Rodriguez)

[16] ***. Inputs were reported in a manner consistent with the companies' accounting books and records. *** U.S. producers questionnaire responses sections, 3.6, 3.7a, and 3.7b.

from 2021 to 2023, and in the comparable interim periods (see table 6.3).[17] [18] As a ratio to net sales, direct labor costs increased from 8.9 percent in 2021 to 9.7 percent in 2023, and were higher in interim 2024 at 11.1 percent compared with interim 2023 at 9.9 percent.

As shown in table 6.1, other factory costs, the largest component of COGS in all years in which data were collected, increased overall by 5.5 percent from 2021 to 2023, and were 7.5 percent lower in interim 2024 compared with interim 2023. On an average per square foot basis, other factory costs increased from $0.53 in 2021 to $0.60 in 2023, and were somewhat higher in interim 2024 at $0.62 compared with interim 2023 at $0.61. Directional trends were overall uniform between U.S. producers that operated continuously throughout the reporting period from 2021 to 2023, and in the comparable interim periods (see table 6.3). As a ratio to net sales, other factory costs decreased from 37.0 percent in 2021 to 36.0 percent in 2023, and were lower in interim 2024 at 36.2 percent compared with interim 2023 at 36.8 percent.

Total COGS increased irregularly by 11.5 percent from 2021 to 2023, with the majority of the increase occurring from 2021 to 2022. Total COGS were 5.8 percent lower in interim 2024 compared with interim 2023. On an average per square foot basis, total COGS increased from $0.96 in 2021 to $1.13 in 2023, and were higher in interim 2024 at $1.21 compared with interim 2023 at $1.17. As a ratio to net sales, total COGS increased from 66.3 percent in 2021 to 68.2 percent in 2023, and were somewhat higher in interim 2024 at 70.3 percent compared with interim 2023 at 70.2 percent (see table 6.1).[19]

As shown in table 6.1, gross profit increased irregularly from $420.9 million in 2021 to $430.8 million in 2023, and was lower in interim 2024 at $287.5 compared with interim 2023 at $307.8 million. As a ratio to net sales, gross profit decreased from 33.7 percent in 2021 to 31.8 percent in 2023, and was 0.1 percentage point lower in interim 2024 at 29.7 percent compared with interim 2023 at 29.8 percent. As shown in table 6.3, *** U.S. producers that operated continuously throughout the reporting period showed an increase in gross profit or an improved loss from 2021 to 2023, and *** showed a lower gross profit in interim

[17] ***. U.S. producers' questionnaire responses, section 2.13.

[18] ***. Email from ***, May 14, 2024.

[19] ***.

2024 compared with interim 2023.[20] *** (see table 6.3).

SG&A expenses and operating income or loss

As shown in table 6.1, U.S. producers' SG&A expenses increased consistently from 2021 to 2023, and were somewhat lower in interim 2024 compared with interim 2023.[21] On a firm by firm basis, directional trends were uniform between the U.S. producers that operated continuously throughout the reporting period from 2021 to 2023, but varied in the comparable interim periods (see table 6.3). The SG&A expense ratio (SG&A expenses divided by total net sales) increased irregularly from 28.2 percent in 2021 to 29.7 percent in 2023 and was higher in interim 2024 at 31.0 percent compared with interim 2023 at 29.2 percent.[22]

As shown in table 6.1, U.S. producers' operating income decreased from $68.8 million in 2021 to $28.4 million in 2023, and was lower in interim 2024 at a negative $12.7 million compared with interim 2023 at a positive $6.3 million. As a ratio to net sales, operating income decreased from 5.5 percent in 2021 to 2.1 percent in 2023 and was lower in interim 2024 at a negative 1.3 percent compared with interim 2023 at a positive 0.6 percent. As shown in table 6.3, *** U.S. producers that operated continuously throughout the reporting period showed a decrease in operating income or a worsening loss from 2021 to 2023, and *** showed a lower operating income or a worse loss in interim 2024

[20] ***. Email from ***, May 20, 2024.
[21] ***. Petitioner's posthearing brief, pp.45-46.
[22] ***. *** U.S. producers questionnaire response, sections 3.10a and 3.10b.

compared with interim 2023. *** (see table 6.1).

All other expenses and net income or loss

Classified below the operating income level are interest expenses, other expenses and other income. Interest expense, other expense, and other income were combined and only the net amount is shown in table 6.1. Total net other expenses/income irregularly increased from 2021 to 2023, and was higher in interim 2024 compared with interim 2023. The majority of the increase was driven by interest expense and all other expense items. *** reported interest expenses, and *** U.S. producers reported other expense items.[23] [24] All other income items were reported by *** U.S. producers.[25] [26]

As shown in table 6.1, net income decreased from $54.4 million in 2021 to $51.0 million in 2022, and further decreased into a loss of $4.0 million in 2023. The net loss was worse in interim 2024 at negative $47.3 million compared with interim 2023 at a negative $19.9 million.[27] As a ratio to net sales, net income decreased from a positive 4.4 percent in 2021 to a

[23] ***. Email from ***, May 14, 2024.

[24] ***. *** U.S. producers questionnaire response, sections 3.10a and 3-10b, and email from ***, May 9, 2024.

[25] ***. *** U.S. producers questionnaire response, sections 3.10a and 3.10b, and email from ***, May 15, 2024.

[26] ***. *** U.S. producers questionnaire response, sections 3.10a and 3.10b.

[27] ***.

negative 0.3 percent in 2023, and net loss was higher in interim 2024 at a negative 4.9 percent compared with interim 2023 at a negative 1.9 percent. As shown in table 6.3, *** U.S. producers that operated continuously throughout the reporting period showed a decrease in net income or a worsening loss from 2021 to 2023, and *** reported a lower net income or worsening net loss in interim 2024 compared with interim 2023. *** (see table 6.3).[28]

Capital expenditures and research and development expenses

Table 6.5 presents capital expenditures, by firm, and table 6.7 presents R&D expenses, by firm. Tables 6.6 and 6.8 present the firms' narrative explanations of the nature, focus, and significance of their capital expenditures and R&D expenses, respectively. Capital expenditures increased from 2021 to 2023 *** reported notable increases in capital expenditures from 2021 to 2023).[29] [30] [31] [32] Capital expenditures were lower in interim 2024 compared with interim 2023 (largely reflecting data from Florim, Landmark and Portobello). [33] [34]

R&D expenses (***) increased from 2021 to 2023, and were lower in interim 2024 compared with interim 2023.[35]

[28] A variance analysis is not presented due to the large differences in product mix and the effects on unit cost trends related to start-up operations.

[29] ***. Email from ***, May 13, 2024.

[30] ***. *** U.S. producers response, section 3.13b, and email from ***, May, 13, 2024.

[31] ***. Email from ***, May 16, 2024.

[32] ***. Email from ***, May 8, 2024.

[33] ***.

[34] ***. Email from ***, February 7, 2025.

[35] ***. Email from ***, March 19, 2025.

Table 6.5 Ceramic tile: U.S. producers' capital expenditures, by firm and period

Value in 1,000 dollars; interim is January to September

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	42,032	147,186	225,748	169,550	50,206

Source: Compiled from data submitted in response to Commission questionnaires.

Table 6.6 Ceramic tile: U.S. producers' narrative descriptions of their capital expenditures, by firm

Firm	Narrative on capital expenditures
AHF (Crossville Brand)	***
American Wonder	***
Dal-Tile	***
Del Conca	***
Florida Tile	***
Florim	***
Ironrock	***
Landmark	***
Portobello	***
Stonepeak	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table 6.7 Ceramic tile: U.S. producers' R&D expenses, by firm and period

Value in 1,000 dollars

Firm	2021	2022	2023	Interim 2023	Interim 2024
AHF (Crossville Brand)	***	***	***	***	***
American Wonder	***	***	***	***	***
Dal-Tile	***	***	***	***	***
Del Conca	***	***	***	***	***
Florida Tile	***	***	***	***	***
Florim	***	***	***	***	***
Ironrock	***	***	***	***	***
Landmark	***	***	***	***	***
Portobello	***	***	***	***	***
Stonepeak	***	***	***	***	***
All firms	13,323	21,899	25,062	18,680	18,460

Source: Compiled from data submitted in response to Commission questionnaires.

Table 6.8 Ceramic tile: U.S. producers' narrative descriptions of their R&D expenses, by firm

Firm	Narrative on R&D expenses
AHF (Crossville Brand)	***
American Wonder	***
Dal-Tile	***
Del Conca	***
Florida Tile	***
Florim	***
Ironrock	***
Landmark	***
Portobello	***
Stonepeak	***

Source: Compiled from data submitted in response to Commission questionnaires.

Assets and return on assets

Table 6.9 presents data on the U.S. producers' total assets while table 6.10 presents their operating ROA.[36] Table 6.11 presents U.S. producers' narrative responses explaining their major asset categories and any significant changes in asset levels over time. Total net assets decreased irregularly from $2.2 billion in 2021 to $2.1 billion in 2023. ROA decreased from 3.1 percent in 2021 to 1.4 percent in 2023.

Table 6.9 Ceramic tile: U.S. producers' total net assets, by firm and period

Value in 1,000 dollars

Firm	2021	2022	2023
AHF (Crossville Brand)	***	***	***
American Wonder	***	***	***
Dal-Tile	***	***	***
Del Conca	***	***	***
Florida Tile	***	***	***
Florim	***	***	***
Ironrock	***	***	***
Landmark	***	***	***
Portobello	***	***	***
Stonepeak	***	***	***
All firms	2,194,368	2,009,441	2,082,081

Source: Compiled from data submitted in response to Commission questionnaires.

[36] The operating ROA is calculated as operating income divided by total assets. With respect to a firm's overall operations, the total asset value reflects an aggregation of a number of assets which are generally not product specific. Thus, high-level allocations are generally required in order to report a total asset value on a product-specific basis.

Table 6.10 Ceramic tile: U.S. producers' ROA, by firm and period

Ratio in percent

Firm	2021	2022	2023
AHF (Crossville Brand)	***	***	***
American Wonder	***	***	***
Dal-Tile	***	***	***
Del Conca	***	***	***
Florida Tile	***	***	***
Florim	***	***	***
Ironrock	***	***	***
Landmark	***	***	***
Portobello	***	***	***
Stonepeak	***	***	***
All firms	3.1	3.2	1.4

Source: Compiled from data submitted in response to Commission questionnaires.

Table 6.11 Ceramic tile: U.S. producers' narrative descriptions of their total net assets, by firm

Firm	Narrative on assets
AHF (Crossville Brand)	***
American Wonder	***
Dal-Tile	***
Del Conca	***
Florida Tile	***
Florim	***
Ironrock	***
Landmark	***
Portobello	***
Stonepeak	***

Source: Compiled from data submitted in response to Commission questionnaires.

Capital and investment

The Commission requested U.S. producers of ceramic tile to describe any actual or potential negative effects of imports of ceramic tile from India on their firms' growth, investment, ability to raise capital, development and production efforts, or the scale of capital investments. Table 6.13 presents the number of firms reporting an impact in each category and table 6.14 provides the U.S. producers' narrative responses.

Table 6.13 Ceramic tile: Count of firms indicating actual and anticipated negative effects of imports from subject sources on investment, growth, and development since January 1, 2021, by effect

Number of firms reporting

Effect	Category	Count
Cancellation, postponement, or rejection of expansion projects	Investment	7
Denial or rejection of investment proposal	Investment	3
Reduction in the size of capital investments	Investment	4
Return on specific investments negatively impacted	Investment	7
Other investment effects	Investment	1
Any negative effects on investment	Investment	8
Rejection of bank loans	Growth	2
Lowering of credit rating	Growth	2
Problem related to the issue of stocks or bonds	Growth	0
Ability to service debt	Growth	4
Other growth and development effects	Growth	1
Any negative effects on growth and development	Growth	6
Anticipated negative effects of imports	Future	9

Source: Compiled from data submitted in response to Commission questionnaires.

***.

Table 6.14 Ceramic tile: U.S. producers' narratives relating to actual and anticipated negative effects of imports on investment, growth, and development, since January 1, 2021, by firm and effect

Item	Firm name and narrative on impact of imports
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Denial or rejection of investment proposal	***
Denial or rejection of investment proposal	***
Denial or rejection of investment proposal	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Return on specific investments negatively impacted	***

Item	Firm name and narrative on impact of imports
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Other negative effects on investments	***
Rejection of bank loans	***
Rejection of bank loans	***
Lowering of credit rating	***
Lowering of credit rating	***
Ability to service debt	***
Ability to service debt	***
Ability to service debt	***
Ability to service debt	***
Other effects on growth and development	***
Anticipated effects of imports	***

Item	Firm name and narrative on impact of imports
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***

Source: Compiled from data submitted in response to Commission questionnaires.

Part 7: Threat considerations and information on nonsubject countries

Section 771(7)(F)(i) of the Act (19 U.S.C. § 1677(7)(F)(i)) provides that—

> *In determining whether an industry in the United States is threatened with material injury by reason of imports (or sales for importation) of the subject merchandise, the Commission shall consider, among other relevant economic factors*[1]*--*
>
> *(I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement), and whether imports of the subject merchandise are likely to increase,*
>
> *(II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,*
>
> *(III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,*
>
> *(IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices, and are likely to increase demand for further imports,*
>
> *(V) inventories of the subject merchandise,*

[1] Section 771(7)(F)(ii) of the Act (19 U.S.C. § 1677(7)(F)(ii)) provides that "The Commission shall consider {these factors} . . . as a whole in making a determination of whether further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted under this title. The presence or absence of any factor which the Commission is required to consider . . . shall not necessarily give decisive guidance with respect to the determination. Such a determination may not be made on the basis of mere conjecture or supposition."

(VI) the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,

(VII) in any investigation under this title which involves imports of both a raw agricultural product (within the meaning of paragraph (4)(E)(iv)) and any product processed from such raw agricultural product, the likelihood that there will be increased imports, by reason of product shifting, if there is an affirmative determination by the Commission under section 705(b)(1) or 735(b)(1) with respect to either the raw agricultural product or the processed agricultural product (but not both),

(VIII) the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and

(IX) any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).[2]

Information on the nature of the subsidies was presented earlier in this report; information on the volume and pricing of imports of the subject merchandise is presented in Parts 4 and 5; and information on the effects of imports of the subject merchandise on U.S. producers' existing development and production efforts is presented in Part 6. Information on inventories of the subject merchandise; foreign producers' operations, including the potential for "product-shifting;" any other threat indicators, if applicable; and any dumping in third-country markets, follows. Also presented in this section of the report is information obtained on nonsubject countries.

[2] Section 771(7)(F)(iii) of the Act (19 U.S.C. § 1677(7)(F)(iii)) further provides that, in antidumping investigations, ". . . the Commission shall consider whether dumping in the markets of foreign countries (as evidenced by dumping findings or antidumping remedies in other WTO member markets against the same class or kind of merchandise manufactured or exported by the same party as under investigation) suggests a threat of material injury to the domestic industry."

The industry in India

The Commission issued foreign producers' or exporters' questionnaires to 138 firms believed to produce and/or export ceramic tile from India.[3] Usable responses to the Commission's questionnaire were received from 20 firms.

Table 7.1 presents the number of producers/exporters in India that responded to the Commission's questionnaire, their estimated share of total production of ceramic tile in India during 2023 and their estimated exports to the United States as a share of U.S. imports from India in 2023.

Table 7.1 Ceramic tile: Number of responding producers/exporters, approximate share of production, and exports to the United States as a share of U.S. imports from India, 2023

Subject foreign industry	Number of responding firms	Approximate share of production (percent)	Exports as a share of U.S. imports from subject country (percent)
India	20	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: "Approximate share of production" reflects the responding firms' estimates of their production as a share of total India production of ceramic tile in 2023. Since not all firms have perfect knowledge of the industry in their home market, different firms might use different denominators in estimating their firm's share of the total requested.

Table 7.2 presents information on the ceramic tile operations of the responding producers in India (or the responding subject producers, by firm) and table 7.3 presents summary data for resellers of ceramic tile from India.

[3] These firms were identified through a review of information submitted in the petition, responses in the preliminary phase of these investigations, and presented in third-party sources.

Table 7.2 Ceramic tile: Summary data for subject foreign producers, by firm, 2023

Producer	Production (1,000 square feet)	Share of reported production (percent)	Exports to the United States (1,000 square feet)	Share of reported exports to the United States (percent)	Total shipments (1,000 square feet)	Share of firm's total shipments exported to the United States (percent)
Adicon	***	***	***	***	***	***
Antiek	***	***	***	***	***	***
Antiqa Ceramic	***	***	***	***	***	***
Aqval	***	***	***	***	***	***
Dureza	***	***	***	***	***	***
Emcer	***	***	***	***	***	***
Itacon	***	***	***	***	***	***
Lorence	***	***	***	***	***	***
Neelson	***	***	***	***	***	***
Spolo	***	***	***	***	***	***
Theos	***	***	***	***	***	***
Varmora	***	***	***	***	***	***
Velsaa	***	***	***	***	***	***
Victory	***	***	***	***	***	***
Win-Tel	***	***	***	***	***	***
All individual producers	***	100.0	***	100.0	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 7.3 Ceramic tile: Summary data for subject resellers in India, by firm, 2023

Reseller	Resales exported to the United States (1,000 square feet)	Share of resales exported to the United States (percent)
Antiek	***	***
Antiqa Ceramic	***	***
Antiqa Minerals	***	***
Asia Pacific	***	***
Emcer	***	***
Lorence	***	***
Marbex	***	***
Spolo	***	***
Varmora	***	***
Velsaa	***	***
Victory	***	***
Win-Tel	***	***
All individual resellers	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 7.4 presents events in India's industry since January 1, 2021.

Table 7.4 Ceramic tile: Important industry events in India since January 1, 2021

Item	Firm	Event
Expansion	Lorison Tiles	In 2021, Lorison Tiles located in Jivapar, Morbi, added Luften Tiles, a new manufacturing unit for ceramic wall tiles located in Morbi, Gujarat. Its production capacity is 129.2 million square feet (12 million square meters) per annum.
Expansion	Kajaria Ceramics	From January 2021 to March 2024, Kajaria Ceramics increased its production capacity by 16.07 million square meters (173 million square feet) per annum by bringing new units into operation at existing facilities and by acquiring subsidiaries. The firm's overall production capacity rose from 70.40 square meters (757.8 million square feet) per annum to 86.47 square meters (930.8 million square feet) per annum. Kajaria Ceramics currently own four facilities: Gailpur, Rajasthan; Malootana, Rajasthan; Sikandrabad,Uttar Pradesh; and Srikalahasti, Andhra Pradesh. It also has three subsidiaries: Kajaria Vitrified (formerly known as Jaxx Vitrified), Morbi, Gujarat; Kajaria Infinity (formerly known as Cosa Ceramics), Morbi, Gujarat and South Asian Ceramics, Balanagar, Telangana.
Expansion	Asian Granito India Limited	In 2021, Asian Granito India Ltd. headquartered in Ahmedabad, Gujarat, is the seventh largest tile producer in India. The firm completed an expansion project to increase tile production capacity by around 129,167 square feet per day, raising its total production capacity to *** each year.
Expansion	Murudeshwar Ceramics Ltd.	In 2022, Murudeshwar Ceramics Ltd. approved a project that will increase production capacity at its Sira Plant, in Hubli, Karnataka, by approximately 86,111 square feet per day, and at its Karaikal Plant, in Karaikal, Pondicherry, by approximately 32,292 square feet per day.
Expansion	Prism Johnson	In 2022, Prism Johnson headquartered in Kalina, Santacruz (East), Mumbai, completed the expansion of its annual tile production capacity by 43.1 million square feet through joint venture entities.
Expansion	Somany Ceramics	In 2022, Somany Ceramics whose headquarters is in Uttar Pradesh expanded its annual tile production capacity from 678 million square feet to 796 million square feet.
Expansion	Prism Johnson	In 2023, Prism Johnson opened a new tile manufacturing plant at Panagarh, West Bengal, with an annual production capacity of 6.3 million square meters (7.8 million square feet). This company also completed a joint venture which expanded its tile annual production capacity by 1.2 million square meters (12.9 million square feet). Prism Johnson's current production

Item	Firm	Event
		capacity is 656.6 million square feet across 10 manufacturing plants in India.
Expansion	Lavish Ceramics	In 2021, Lavish Ceramics installed India's largest kiln (2,798 square feet), at its Luxgres Ceramica LLP factory located in Morbi, Gujarat. Lavish Ceramics annual production capacity is 172.2 million square feet.
Expansion	Lavish Ceramics	In 2022, Lavish Ceramics, located in Morbi, Gujarat, transformed its wall tile unit (silk ceramics) into a glazed porcelain tile production factory by reinvesting in the existing infrastructure.
Expansion	Lavish Ceramics	In 2023, Lavish Ceramics, located in Morbi, Gujarat, revamped its double charge factory infrastructure and began producing a new line of high performance 2 cm outdoor glazed porcelain tiles.
Acquisition	Regency Ceramics	In 2024, Regency Ceramics announced a structured takeover of Segno Ceramics Private Limited in the Bapatla district in Andhra Pradesh. The plant has a production capacity of 3.6 million square meters per year.
Plant reopening	Regency Ceramics	Until recently, Regency Ceramics was not operating its Yanam facility due to extended litigation over labor issues. Facilities had closed in 2012, but the company has since begun the process or reopening as of late 2023.

Source: Kajaria Ceramics, Corporate Presentation, January 2021 – March 2024, retrieved March 11, 2025, https://www.kajariaceramics.com/analyst-presentation.php; Lavish Ceramics, Company Profile, "The Million Mile Story," accessed March 11, 2025, https://www.lavishceramics.com/company-profile/; Lorison Tiles, "Our Milestone," retrieved March 11, 2025, https://lorisontiles.com/milestone/; Luften Tiles, "Export," retrieved March 11, 2025, https://www.luftentilesllp.com/export; Petition, pp. 37 - 38; Prism Johnson, Company Presentation, "Corporate Presentation February 2024," February 2024, accessed March 11, 2025, https://www.prismjohnson.in/wp-content/uploads/2024/02/Prism-Johnson-Corporate-Presentation-Feb-2024.pdf; Regency natural tiles, "A Legacy of Excellence," regencyceramics.in, no date, https://www.regencyceramics.in/about-us/, accessed March 11, 2025; Business Line, "How Regency Ceramics is back in business after 11 years," September 10, 2023, https://www.thehindubusinessline.com/specials/corporate-file/how-regency-ceramics-is-back-in-business-after-11-years/article67291231.ece, Accessed 3/11/25. The Hindu, "Regency Ceramics chalks out ₹100-cr. plan to revive Yanam unit," The Hindu.com, September 22, 2023, https://www.thehindu.com/business/regency-ceramics-chalks-out-100-cr-plan-to-revive-yanam-unit/article67334440.ece, Accessed March 25, 2025.

Changes in operations

Producers in India were asked to report any change in the character of their operations or organization relating to the production of ceramic tile since 2021. Eight of fifteen producers indicated in their questionnaires that they had experienced such changes. The most commonly reported changes were production curtailments, expansions, and weather-related or force majeure events (all reported by 4 firms). Tables 7.5 and 7.6 present the changes identified by these producers.

Table 7.5 Ceramic tile: Count of reported production constraints, by subject foreign industry and type of constraint

Item	India
Plant openings	2
Plant closings	1
Prolonged shutdowns	0
Production curtailments	4
Relocations	0
Expansions	4
Acquisitions	1
Consolidations	0
Weather-related or force majeure events	4
Other	1
Any change	8

Source: Compiled from data submitted in response to Commission questionnaires.

Table 7.6 Ceramic tile: Reported changes in operations in India since January 1, 2021, by firm

Item	Firm name and accompanying narrative response regarding changes in operations
Plant openings	***
Plant openings	***
Plant closings	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***
Acquisitions	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***
Other	***

Source: Compiled from data submitted in response to Commission questionnaires.

Installed and practical overall capacity

Table 7.7 presents data on India producers' installed capacity, practical overall capacity, and practical ceramic tile capacity and production on the same equipment. Between 2021 and 2023, *** firms reported no change in installed overall capacity, while 7 firms reported an increase and no firms reported a decrease. In the first three quarters of 2024, *** firms reported no changes in installed overall capacity compared with year-earlier period, while *** reported a decrease and *** reported an increase. In terms of practical overall capacity, *** firms reported an increase during 2021 to 2023, while *** firms reported no change, and *** firm reported a decrease. In the first nine months of 2024, *** firms reported no changes in installed overall capacity compared with year-earlier period, while *** reported a decrease and *** reported an increase.

Among the producers that responded to the questionnaire, installed overall capacity increased by 18.3 percent during 2021 to 2023. During the first nine months of 2024, installed overall capacity rose 3.8 percent in comparison with January-September 2023. Following a similar trend, practical overall capacity increased by 19.4 percent during 2021 to 2023 and was 4.7 percent higher during interim 2024 than in interim 2023. Practical overall production increased by 27.9 percent between 2021 and 2023 and was 7.2 percent higher in interim 2024 than in interim 2023.

Installed overall capacity utilization fell 1.9 percentage points in 2022 before rising 7.7 percentage points in 2023. Despite the 2022 decline, installed overall capacity utilization increased 5.8 percentage points from 2021 to 2023. In interim 2024 installed overall capacity utilization was 2.5 percent points higher in comparison with the interim period of 2023. Practical overall capacity utilization fell 0.4 percentage points in 2022, before rising 6.2 percentage points in 2023, for a cumulative rise of 5.7 percentage points from 2021 to 2023. In the first nine months of 2024, practical overall capacity utilization increased by 2.0 percentage points in comparison with the same period a year earlier.

Table 7.7 Ceramic tile: Indian producers' installed and practical capacity and production on the same equipment as in-scope production, by period

Capacity and production in 1,000 square feet; utilization in percent; Interim period is January through September

Item	Measure	2021	2022	2023	Interim 2023	Interim 2024
Installed overall	Capacity	825,328	962,877	976,602	723,545	751,143
Installed overall	Production	594,686	675,864	760,681	555,204	594,944
Installed overall	Utilization	72.1	70.2	77.9	76.7	79.2
Practical overall	Capacity	736,686	841,835	879,783	656,678	687,657
Practical overall	Production	594,686	675,864	760,681	555,204	594,944
Practical overall	Utilization	80.7	80.3	86.5	84.5	86.5
Practical Ceramic tile	Capacity	736,686	841,835	879,763	656,678	687,657
Practical Ceramic tile	Production	594,686	675,864	760,681	555,204	594,944
Practical Ceramic tile	Utilization	80.7	80.3	86.5	84.5	86.5

Source: Compiled from data submitted in response to Commission questionnaires.

Constraints on capacity

Tables 7.8 and 7.9 present Indian producers' reported capacity constraints since January 1, 2021. Production bottlenecks were highlighted most frequently as constraints, cited by *** firms. That was followed by fuel or energy shortages, with *** firms.

Table 7.8 Ceramic tile: Count of reported production constraints, by type of constraint

Type of constraint	India
Production bottlenecks	5
Existing labor force	0
Supply of material inputs	2
Fuel or energy	4
Storage capacity	1
Logistics/transportation	2
Other constraints	2

Source: Compiled from data submitted in response to Commission questionnaires.

Table 7.9 Ceramic tile: Indian producers' reported constraints to practical overall capacity since January 1, 2021, by constraint and firm

Type of constraint	Subject foreign industry, firm name, and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Supply of material inputs	***
Supply of material inputs	***
Fuel or energy	***
Fuel or energy	***
Fuel or energy	***
Fuel or energy	***
Storage capacity	***
Logistics/ transportation	***
Logistics/ transportation	***
Other constraints	***
Other constraints	***

Source: Compiled from data submitted in response to Commission questionnaires.

Operations on ceramic tile

Tables 7.10 present information on the ceramic tile operations of the responding producers and exporters in India. All producers responding to the questionnaire are focused solely on ceramic tile production, meaning that practical ceramic tile capacity was equal to practical overall capacity (see table 7.7). Indian producers' ceramic tile production increased overall by 27.9 percent during 2021 to 2023. During the first nine months of 2024, production rose 7.2 percent in comparison with the same period a year earlier. Relative to 2023 levels, Indian producers' capacity and production are projected to be higher in 2024 and 2025.

Indian producers' exports to the United States increased overall by 47.3 percent during 2021 to 2023 and rose 13.3 percent in the first nine months of 2024 compared to the same period a year earlier. The leading exporters of ceramic tile to the United States were ***. Indian producers' commercial home market shipments increased overall by 34.6 percent during 2021 to 2023 and by 4.5 percent in the first nine months of 2024. Exports to all other market increased 1.7 percent in 2022 before falling 9.9 percent in 2023. In the first nine months of 2024, exports to all other markets rose 3.1 percent in comparison with the same period of 2023. Relative to 2023 levels, commercial home market shipments and exports to markets outside the United States are expected to increase in 2024 and 2025. Meanwhile, exports to the United States are expected to increase in 2024 before falling in 2025.

Commercial home market shipments as a share of subject producers' total shipments increased from 74.3 percent in 2021 to 76.2 percent in 2023. In the first nine months of 2024, that share reached 76.6 percent. Exports to the United States as a share of Indian producers' total shipments increased from 11.5 percent in 2021 to 12.9 percent in 2023, rising to 13.7 percent in the first nine months of 2024. Exports to all other markets as a share of total shipments decreased from 14.2 percent in 2021 to 10.0 percent in 2023. In the first nine months of 2024, that share dropped to 9.7 percent.

Table 7.10 Ceramic tile: Data on industry in India, by period

Quantity in 1,000 square feet; Interim period is January through September

Item	2021	2022	2023	Interim 2023	Interim 2024	Projection 2024	Projection 2025
Capacity	736,686	841,835	879,763	656,678	687,657	914,208	950,462
Production	594,686	675,864	760,681	555,204	594,944	818,286	863,662
End-of-period inventories	63,101	68,571	85,556	79,621	103,579	108,812	124,759
Internal consumption	—	—	6,907	—	—	—	—
Commercial home market shipments	424,689	513,554	571,557	423,575	442,539	634,459	673,657
Home market shipments	424,689	513,554	578,464	423,575	442,539	634,459	673,657
Exports to the United States	65,725	77,752	96,798	70,142	79,444	101,794	98,765
Exports to all other markets	81,481	82,830	74,645	54,150	55,827	75,667	97,374
Export shipments	147,206	160,582	171,443	124,292	135,271	177,461	196,139
Total shipments	571,895	674,136	749,907	547,867	577,810	811,920	869,796
Resales exported to the United States	42,115	68,041	85,261	55,836	68,990	73,741	65,907
Total exports to the United States	107,840	145,793	182,059	125,978	148,434	175,535	164,672

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 7.10 Continued Ceramic tile: Data on industry in India, by period

Shares and ratios in percent; Interim period is January through September

Item	2021	2022	2023	Interim 2023	Interim 2024	Projection 2024	Projection 2025
Capacity utilization ratio	80.7	80.3	86.5	84.5	86.5	89.5	90.9
Inventory ratio to production	10.6	10.1	11.2	10.8	13.1	13.3	14.4
Inventory ratio to total shipments	11.0	10.2	11.4	10.9	13.4	13.4	14.3
Internal consumption share	—	—	0.9	—	—	—	—
Commercial home market shipments share	74.3	76.2	76.2	77.3	76.6	78.1	77.4
Home market shipments share	74.3	76.2	77.1	77.3	76.6	78.1	77.4
Exports to the United States share	11.5	11.5	12.9	12.8	13.7	12.5	11.4
Exports to all other markets share	14.2	12.3	10.0	9.9	9.7	9.3	11.2
Export shipments share	25.7	23.8	22.9	22.7	23.4	21.9	22.6
Total shipments share	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Producers' exports to the United States share	60.9	53.3	53.2	55.7	53.5	58.0	60.0
Resellers' exports to the United States share	39.1	46.7	46.8	44.3	46.5	42.0	40.0
Adjusted exports to the United States share of total shipments	18.9	21.6	24.3	23.0	25.7	21.6	18.9

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Alternative products

No responding firms in India produced other products on the same equipment and machinery used to produce ceramic tile.

Exports

According to GTA, the leading export markets for ceramic tile from India in 2023 were the United States, United Arab Emirates, Iraq, Mexico, and Kuwait (table 7.11). In 2023, the United States was the top export market for ceramic tile from India, accounting for 6.0 percent,

followed by the United Arab Emirates (5.8 percent), Iraq (5.6 percent), Mexico (4.7 percent) and Kuwait (4.2 percent).

Table 7.11 Ceramic tile: Exports from India by period

Quantity in 1,000 square feet; value in 1,000 dollars

Destination market	Measure	2021	2022	2023
United States	Quantity	301,752	291,020	379,700
United Arab Emirates	Quantity	248,564	269,181	367,060
Iraq	Quantity	281,575	277,982	351,090
Mexico	Quantity	187,107	128,880	294,507
Kuwait	Quantity	294,905	211,606	268,473
Russia	Quantity	121,103	108,652	247,372
Israel	Quantity	105,567	96,984	238,217
Oman	Quantity	182,715	184,944	235,502
South Africa	Quantity	136,089	93,866	210,562
All other destination markets	Quantity	3,271,425	2,883,915	3,730,246
Non-U.S. destination markets	Quantity	4,829,049	4,256,010	5,943,030
All destination markets	Quantity	5,130,802	4,547,030	6,322,730
United States	Value	105,161	142,587	182,192
United Arab Emirates	Value	89,078	105,396	134,094
Iraq	Value	87,614	106,076	129,604
Mexico	Value	70,674	56,033	118,452
Kuwait	Value	74,633	77,583	92,328
Russia	Value	55,075	52,977	113,048
Israel	Value	42,468	45,739	96,993
Oman	Value	55,572	65,044	73,379
South Africa	Value	45,341	35,130	62,239
All other destination markets	Value	1,140,402	1,159,651	1,436,823
Non-U.S. destination markets	Value	1,660,857	1,703,629	2,256,962
All destination markets	Value	1,766,018	1,846,216	2,439,154

Table continued.

Table 7.11 (Continued) Ceramic tile: Exports from India, by destination market and by period

Unit values in dollars per square foot; share in percent

Destination market	Measure	2021	2022	2023
United States	Unit value	0.35	0.49	0.48
United Arab Emirates	Unit value	0.36	0.39	0.37
Iraq	Unit value	0.31	0.38	0.37
Mexico	Unit value	0.38	0.43	0.40
Kuwait	Unit value	0.25	0.37	0.34
Russia	Unit value	0.45	0.49	0.46
Israel	Unit value	0.40	0.47	0.41
Oman	Unit value	0.30	0.35	0.31
South Africa	Unit value	0.33	0.37	0.30
All other destination markets	Unit value	0.35	0.40	0.39
Non-U.S. destination markets	Unit value	0.34	0.40	0.38
All destination markets	Unit value	0.34	0.41	0.39
United States	Share of quantity	5.9	6.4	6.0
United Arab Emirates	Share of quantity	4.8	5.9	5.8
Iraq	Share of quantity	5.5	6.1	5.6
Mexico	Share of quantity	3.6	2.8	4.7
Kuwait	Share of quantity	5.7	4.7	4.2
Russia	Share of quantity	2.4	2.4	3.9
Israel	Share of quantity	2.1	2.1	3.8
Oman	Share of quantity	3.6	4.1	3.7
South Africa	Share of quantity	2.7	2.1	3.3
All other destination markets	Share of quantity	63.8	63.4	59.0
Non-U.S. destination markets	Share of quantity	94.1	93.6	94.0
All destination markets	Share of quantity	100.0	100.0	100.0

Source: Official exports statistics under HS subheadings 6907.21, 6907.22, 6907.23, 6907.30, and 6907.40 as reported by Indian Ministry of Commerce in the Global Trade Atlas Suite database, accessed February 28, 2025.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---". United States is shown at the top followed by the top destination markets in descending order of 2023 data.

U.S. inventories of imported merchandise

Table 7.12 presents data on U.S. importers' reported inventories of ceramic tile. U.S. importers' inventories of imports from India increased each year, increasing overall by *** percent from 2021 to 2023 and another *** percent in the first nine months of 2024 in comparison with the similar period a year earlier.[4] U.S. importers' inventories of imports from nonsubject increased by *** percent during 2021 to 2022, then decreased by *** percent during 2022 to 2023, increasing overall by *** percent from 2021 to 2023.[5] During the first nine months of 2024, U.S. inventories of imports from nonsubject countries fell *** percent compared with the similar period a year earlier. Inventories of subject imports from India relative to U.S. imports decreased by *** percentage points from 2021 to 2022 but increased by *** percentage points from 2022 to 2023, bringing a cumulative increase of *** percentage points from 2021 to 2023. Relative to U.S. shipments of imports, inventories of subject imports from India increased by *** percentage points in 2021 to 2023.

[4] ***.

[5] ***.

Table 7.12 Ceramic tile: U.S. importers' inventories and their ratio to select items, by source and period

Quantity in 1,000 square feet; Ratio in percent; Interim period is January through September

Measure	Source	2021	2022	2023	Interim 2023	Interim 2024
Inventories quantity	India	***	***	***	***	***
Ratio to imports	India	***	***	***	***	***
Ratio to U.S. shipments of imports	India	***	***	***	***	***
Ratio to total shipments of imports	India	***	***	***	***	***
Inventories quantity	Brazil	***	***	***	***	***
Ratio to imports	Brazil	***	***	***	***	***
Ratio to U.S. shipments of imports	Brazil	***	***	***	***	***
Ratio to total shipments of imports	Brazil	***	***	***	***	***
Inventories quantity	Italy	***	***	***	***	***
Ratio to imports	Italy	***	***	***	***	***
Ratio to U.S. shipments of imports	Italy	***	***	***	***	***
Ratio to total shipments of imports	Italy	***	***	***	***	***
Inventories quantity	Mexico	***	***	***	***	***
Ratio to imports	Mexico	***	***	***	***	***
Ratio to U.S. shipments of imports	Mexico	***	***	***	***	***
Ratio to total shipments of imports	Mexico	***	***	***	***	***
Inventories quantity	Spain	***	***	***	***	***
Ratio to imports	Spain	***	***	***	***	***
Ratio to U.S. shipments of imports	Spain	***	***	***	***	***
Ratio to total shipments of imports	Spain	***	***	***	***	***
Inventories quantity	All other	***	***	***	***	***
Ratio to imports	All other	***	***	***	***	***
Ratio to U.S. shipments of imports	All other	***	***	***	***	***
Ratio to total shipments of imports	All other	***	***	***	***	***
Inventories quantity	Nonsubject sources	***	***	***	***	***
Ratio to imports	Nonsubject sources	***	***	***	***	***
Ratio to U.S. shipments of imports	Nonsubject sources	***	***	***	***	***
Ratio to total shipments of imports	Nonsubject sources	***	***	***	***	***
Inventories quantity	All import sources	***	***	***	***	***

Measure	Source	2021	2022	2023	Interim 2023	Interim 2024
Ratio to imports	All import sources	***	***	***	***	***
Ratio to U.S. shipments of imports	All import sources	***	***	***	***	***
Ratio to total shipments of imports	All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of ceramic tile from India after December 31, 2023. The fifteen responding importers' reported data is presented in table 7.13. India accounted for *** percent and nonsubject sources accounted for *** percent of U.S. importers' arranged imports of ceramic tile.

Table 7.13 Ceramic tile: U.S. importers' arranged imports, by source and period

Quantity in 1,000 square feet

Source	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Total
India	***	***	***	***	***
Brazil	***	***	***	***	***
Italy	***	***	***	***	***
Mexico	***	***	***	***	***
Spain	***	***	***	***	***
All other sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Third-country trade actions

On November 5, 2018, Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Emirates (Gulf Cooperation Council "GCC") initiated an antidumping investigation on imports of ceramic flags and paving, hearth, floor, or wall tiles; whether or not on a backing; finishing ceramics (ceramic tiles) originating in India. The antidumping orders were enforced June 6, 2020, with duties that ranged from 17.6 percent to 70.2 percent for 5 years.[6] With the anti-

[6] WTO, Trade Remedies Data Portal, Antidumping, "Original Investigation AD-4-9/IND," June 6, 2020, retrieved March 25, 2025, AD-4-9/IND - Investigation details - Trade Remedies Data Portal (wto.org).

dumping measures set to expire in May 2025, it was reported that the GCC would begin a final review to determine if the orders should be extended.[7] Taiwan initiated an antidumping investigation on imports of ceramic tiles originating in India on October 28, 2020. The antidumping orders were enforced September 27, 2021, with duties ranging from 0 percent to 20.07 percent.[8] Also on May 5, 2021, Indonesia initiated a safeguard investigation to no longer exclude India from safeguard duties on ceramic tile. Imported tile from India entering Indonesia were subjected to higher duty rates ranging from 13 to 17 percent for a period of three years.[9] On December 13, 2021, the European Union initiated an antidumping investigation on imports in HS category 6907.21, 6907.22, 6907.23, 6907.30, and 6907.40 originating in India. The antidumping orders were enforced February 10, 2023, with duties on imports that range from 6.7 percent to 8.7 percent.[10,11]

Information on nonsubject countries

Table 7.14 presents global export data for ceramic tile, a category that includes HS 6907.21, 6907.22, 6907.23, 6907.30, and 6907.40 (by source in descending order of value for 2023). In 2023, China (23.5 percent), Italy (23.0 percent), Spain (18.7 percent) and India (11.8 percent) accounted for nearly 80 percent of the global export value.

[7] The Peninsula Online, "Review into Anti-Dumping Duties on Ceramic, Porcelain Imports from China and India Initiated," Thepeninsulaqatar.com, March 11, 2025, https://thepeninsulaqatar.com/article/11/03/2025/review-into-anti-dumping-duties-on-ceramic-porcelain-imports-from-china-and-india-initiated-moci (accessed 3/14/25).

[8] WTO, Trade Remedies Data Portal, Antidumping, "Original Investigation 20-0002-IND," October 28, 2020, retrieved March 25, 2025, 20-0002-IND - Investigation details - Trade Remedies Data Portal (wto.org).

[9] WTO, Committee on Safeguards, Notification Under Article 12.1(B) of the Agreement on Safeguards on Finding a Serious Injury or Threat Thereof Caused by Increased Imports, "Notification to Impose a Measure," G/SG/N/10/IDN/20/Suppl.2, https://docs.wto.org/dol2fe/Pages/SS/directdoc.aspx?filename=q:/G/SG/N10IDN20S2.pdf&Open=True , (accessed various dates).

[10] WTO, Trade Remedies Data Portal, Antidumping, "Original Investigation AD684 IND," February 10, 2023, retrieved March 25, 2025, AD684 IND - Investigation details - Trade Remedies Data Portal (wto.org).

[11] Petitioners stated in the hearing that Mexico had also recently initiated an antidumping investigation on ceramic tile from India, but no public information was found to verify this. Hearing transcript, p. 9 (Spooner).

Table 7.14 Ceramic tile: Value of global exports by country and period

Value in 1,000 dollars; share in percent

Exporting country	Measure	2021	2022	2023
United States	Value	53,860	68,050	66,750
India	Value	1,766,018	1,846,216	2,439,154
Italy	Value	5,403,530	5,522,613	4,759,354
Spain	Value	4,360,007	4,504,877	3,858,886
China	Value	3,915,203	4,962,393	4,856,006
Turkey	Value	980,594	1,061,029	665,085
Brazil	Value	488,143	512,538	391,718
Poland	Value	467,759	477,988	465,380
Germany	Value	410,415	407,042	359,591
Portugal	Value	293,874	325,305	302,059
Mexico	Value	251,224	279,186	283,653
United Arab Emirates	Value	240,550	250,889	205,037
All other exporters	Value	2,380,441	2,515,961	2,008,074
All reporting exporters	Value	21,011,617	22,734,086	20,660,747
United States	Share of value	0.3	0.3	0.3
India	Share of value	8.4	8.1	11.8
Italy	Share of value	25.7	24.3	23.0
Spain	Share of value	20.8	19.8	18.7
China	Share of value	18.6	21.8	23.5
Turkey	Share of value	4.7	4.7	3.2
Brazil	Share of value	2.3	2.3	1.9
Poland	Share of value	2.2	2.1	2.3
Germany	Share of value	2.0	1.8	1.7
Portugal	Share of value	1.4	1.4	1.5
Mexico	Share of value	1.2	1.2	1.4
United Arab Emirates	Share of value	1.1	1.1	1.0
All other exporters	Share of value	11.3	11.1	9.7
All reporting exporters	Share of value	100.0	100.0	100.0

Source: Official exports statistics under HS subheadings 6907.21, 6907.22, 6907.23, 6907.30, and 6907.40 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed February 28, 2025.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as “—”. United States is shown at the top followed by the countries under investigation, all remaining top exporting countries in descending order of 2023 data. Only value is presented because quantities are reported globally in mixed units of measure.

APPENDIX A

FEDERAL REGISTER NOTICES

The Commission makes available notices relevant to its investigations and reviews on its website, www.usitc.gov. In addition, the following tabulation presents, in chronological order, Federal Register notices issued by the Commission and Commerce during the current proceeding.

Citation	Title	Link
89 FR 31770, April 25, 2024	Ceramic Tile From India; Institution of Antidumping and Countervailing Duty Investigations and Scheduling of Preliminary Phase Investigations	https://www.govinfo.gov/content/pkg/FR-2024-04-25/pdf/2024-08882.pdf
89 FR 42841, May 9, 2024	Ceramic Tile From India: Initiation of Countervailing Duty Investigation	https://www.govinfo.gov/content/pkg/FR-2024-05-16/pdf/2024-10753.pdf
89 FR 42836, May 9, 2024	Ceramic Tile From India: Initiation of Less-Than-Fair-Value Investigation	https://www.govinfo.gov/content/pkg/FR-2024-05-16/pdf/2024-10749.pdf
89 FR 79245, September 27, 2024	Ceramic Tile From India: Preliminary Affirmative Countervailing Duty Determination, Preliminary Affirmative Critical Circumstances Determination, in Part, and Alignment of Final Determination With the Final Antidumping Duty Determination	https://www.govinfo.gov/content/pkg/FR-2024-09-27/pdf/2024-22228.pdf
89 FR 95182, December 2, 2024	Ceramic Tile From India: Preliminary Negative Determination of Sales at Less Than Fair Value and Postponement of Final Determination	https://www.govinfo.gov/content/pkg/FR-2024-12-02/pdf/2024-28158.pdf
89 FR 104206. December 20, 2024	Ceramic Tile From India; Scheduling of the Final Phase of Countervailing Duty and Antidumping Duty Investigations	https://www.govinfo.gov/content/pkg/FR-2024-12-20/pdf/2024-30379.pdf
90 FR 8405, January 29, 2025	Ceramic Tile From India; Notice of Correction Concerning Scheduling of Testimony and Presentation Dates	https://www.govinfo.gov/content/pkg/FR-2025-01-29/pdf/2025-01857.pdf
90 FR 17030, April 23, 2025	Ceramic Tile From India: Final Negative Determination of Sales at Less Than Fair Value and Final Negative	https://www.govinfo.gov/content/pkg/FR-2025-04-23/pdf/2025-06908.pdf

Citation	Title	Link
	Determination of Critical Circumstances	
90 FR 17036, April 23, 2025	Ceramic Tile From India: Final Affirmative Countervailing Duty Determination and Final Affirmative Critical Circumstances Determination, in Part	https://www.govinfo.gov/content/pkg/FR-2025-04-23/pdf/2025-06909.pdf
90 FR 19227, May 6, 2025	Ceramic Tile From India; Termination of Investigation	https://www.govinfo.gov/content/pkg/FR-2025-05-06/pdf/2025-07831.pdf

APPENDIX B

LIST OF HEARING WITNESSES

CALENDAR OF PUBLIC HEARING

Those listed below appeared in the United States International Trade Commission's hearing:

Subject: Ceramic Tile from India

Inv. Nos.: 701-TA-720 and 731-TA-1688 (Final)

Date and Time: April 17, 2025 - 9:30 a.m.

Sessions were held in connection with these investigations in the Main Hearing Room (Room 101), 500 E Street, SW., Washington, DC.

OPENING REMARKS:

In Support of Imposition (**David M. Spooner**, Barnes & Thornburg LLP)
In Opposition to Imposition (**Jonathan T. Stoel**, Hogan Lovells US LLP)

In Support of the Imposition of the Antidumping and Countervailing Duty Orders:

Barnes & Thornburg LLP
Washington, DC
on behalf of

Coalition for Fair Trade in Ceramic Tile

Eric Astrachan, Executive Director, Tile Council of North America

Filippo Sgarbi, Chief Executive Officer, Landmark Ceramics

Claudio Caselli, Senior Vice President, Research and Development, Dal-Tile Corporation

James Durbin, Vice President of Manufacturing and Outsourcing, Portobello America

Noah Chitty, Vice President of Sustainability and Technical Services, AHF Products

Don Haynes, EHS and Sustainability Manager, Florim USA

Jennifer Lutz, Partner, ION Economics

Rebecca Tuzel, Economic Consultant, ION Economics

David M. Spooner)
) – OF COUNSEL
Christine Sohar Henter)

In Opposition to the Imposition of the
Antidumping and Countervailing Duty Orders:

Hogan Lovells US LLP
Washington, DC
on behalf of

M S International, Inc. ("MSI")

Jonathan T. Stoel)
Lindsay K. Brown) – OF COUNSEL
Meghan Anand)

REBUTTAL/CLOSING REMARKS:

In Support of Imposition (**Christine Sohar Henter**, Barnes & Thornburg LLP)
In Opposition to Imposition (**Jonathan T. Stoel**, Hogan Lovells US LLP)

APPENDIX C

SUMMARY DATA

Table C.1
Ceramic tile: Summary data concerning the U.S. market, by item and period
Quantity=1,000 square feet; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per square foot; Period changes=percent--exceptions noted; Interim period is January through September

	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year			Interim
Item	2021	2022	2023	2023	2024	2021–23	2021-22	2022–23	2023–24
U.S. consumption quantity:									
Amount	3,078,888	3,037,155	2,798,054	2,131,732	1,995,044	▼(9.1)	▼(1.4)	▼(7.9)	▼(6.4)
Producers' share (fn1)	27.8	28.4	28.7	28.6	27.7	▲0.9	▲0.6	▲0.3	▼(0.8)
Importers' share (fn1):									
India	7.1	9.3	14.5	14.2	15.7	▲7.4	▲2.3	▲5.1	▲1.5
Brazil	7.7	7.4	6.6	6.9	5.3	▼(1.1)	▼(0.3)	▼(0.8)	▼(1.5)
Italy	12.6	12.4	10.7	10.7	11.5	▼(1.9)	▼(0.2)	▼(1.7)	▲0.8
Mexico	11.7	11.9	11.9	12.1	10.9	▲0.3	▲0.3	▲0.0	▼(1.1)
Spain	16.0	14.2	12.4	12.6	13.1	▼(3.6)	▼(1.8)	▼(1.7)	▲0.5
All other sources	17.2	16.3	15.2	15.0	15.7	▼(2.0)	▼(0.9)	▼(1.1)	▲0.7
Nonsubject sources	65.2	62.3	56.9	57.2	56.6	▼(8.3)	▼(2.9)	▼(5.4)	▼(0.6)
All import sources	72.2	71.6	71.3	71.4	72.3	▼(0.9)	▼(0.6)	▼(0.3)	▲0.8
U.S. consumption value:									
Amount	3,721,562	4,280,892	3,880,654	2,973,964	2,766,618	▲4.3	▲15.0	▼(9.3)	▼(7.0)
Producers' share (fn1)	33.0	31.5	34.2	34.0	34.3	▲1.1	▼(1.6)	▲2.7	▲0.3
Importers' share (fn1):									
India	4.4	5.8	6.7	6.4	7.2	▲2.2	▲1.3	▲0.9	▲0.7
Brazil	4.6	4.5	4.1	4.3	3.4	▼(0.4)	▼(0.1)	▼(0.3)	▼(0.9)
Italy	21.2	20.7	18.5	18.6	19.1	▼(2.6)	▼(0.5)	▼(2.2)	▲0.5
Mexico	6.6	6.2	7.5	7.4	7.2	▲0.9	▼(0.3)	▲1.2	▼(0.2)
Spain	17.0	18.4	17.0	17.3	16.8	▼(0.0)	▲1.4	▼(1.4)	▼(0.5)
All other sources	13.3	13.0	12.1	12.0	12.1	▼(1.2)	▼(0.3)	▼(0.9)	▲0.1
Nonsubject sources	62.5	62.8	59.2	59.6	58.6	▼(3.4)	▲0.2	▼(3.6)	▼(1.0)
All import sources	67.0	68.5	65.8	66.0	65.7	▼(1.1)	▲1.6	▼(2.7)	▼(0.3)
U.S. imports from:									
India:									
Quantity	217,789	283,919	404,825	303,060	312,903	▲85.9	▲30.4	▲42.6	▲3.2
Value	164,529	246,368	258,718	191,715	198,005	▲57.2	▲49.7	▲5.0	▲3.3
Unit value	$0.76	$0.87	$0.64	$0.63	$0.63	▼(15.4)	▲14.9	▼(26.4)	▲0.0
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▲***	▲***
Brazil:									
Quantity	236,573	225,696	184,634	146,971	106,661	▼(22.0)	▼(4.6)	▼(18.2)	▼(27.4)
Value	170,007	192,180	160,678	126,426	92,853	▼(5.5)	▲13.0	▼(16.4)	▼(26.6)
Unit value	$0.72	$0.85	$0.87	$0.86	$0.87	▲21.1	▲18.5	▲2.2	▲1.2
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▼***	▼***
Italy:									
Quantity	387,502	376,392	298,884	227,272	229,029	▼(22.9)	▼(2.9)	▼(20.6)	▲0.8
Value	787,996	885,957	719,674	552,963	527,531	▼(8.7)	▲12.4	▼(18.8)	▼(4.6)
Unit value	$2.03	$2.35	$2.41	$2.43	$2.30	▲18.4	▲15.8	▲2.3	▼(5.3)
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▼***	▼***
Mexico:									
Quantity	358,997	362,515	334,322	257,374	218,286	▼(6.9)	▲1.0	▼(7.8)	▼(15.2)
Value	244,140	266,570	289,286	220,448	200,114	▲18.5	▲9.2	▲8.5	▼(9.2)
Unit value	$0.68	$0.74	$0.87	$0.86	$0.92	▲27.2	▲8.1	▲17.7	▲7.0
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▲***	▼***
Spain:									
Quantity	492,788	430,616	347,995	268,565	262,157	▼(29.4)	▼(12.6)	▼(19.2)	▼(2.4)
Value	631,289	786,817	658,138	515,158	464,946	▲4.3	▲24.6	▼(16.4)	▼(9.7)
Unit value	$1.28	$1.83	$1.89	$1.92	$1.77	▲47.6	▲42.6	▲3.5	▼(7.5)
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▼***	▼***
All other sources:									
Quantity	530,417	496,268	425,666	319,172	312,439	▼(19.7)	▼(6.4)	▼(14.2)	▼(2.1)
Value	494,012	555,371	468,157	356,425	334,651	▼(5.2)	▲12.4	▼(15.7)	▼(6.1)
Unit value	$0.93	$1.12	$1.10	$1.12	$1.07	▲18.1	▲20.2	▼(1.7)	▼(4.1)
Ending inventory quantity	***	***	***	***	***	▼***	▲***	▼***	▲***
Nonsubject sources:									
Quantity	2,006,277	1,891,486	1,591,501	1,219,354	1,128,572	▼(20.7)	▼(5.7)	▼(15.9)	▼(7.4)
Value	2,327,443	2,686,895	2,295,933	1,771,419	1,620,095	▼(1.4)	▲15.4	▼(14.6)	▼(8.5)
Unit value	$1.16	$1.42	$1.44	$1.45	$1.44	▲24.4	▲22.5	▲1.6	▼(1.2)
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▼***	▼***
All import sources:									
Quantity	2,224,066	2,175,405	1,996,326	1,522,414	1,441,475	▼(10.2)	▼(2.2)	▼(8.2)	▼(5.3)
Value	2,491,972	2,933,264	2,554,650	1,963,134	1,818,099	▲2.5	▲17.7	▼(12.9)	▼(7.4)
Unit value	$1.12	$1.35	$1.28	$1.29	$1.26	▲14.2	▲20.3	▼(5.1)	▼(2.2)
Ending inventory quantity	***	***	***	***	***	▲***	▲***	▲***	▲***

Table continued.

Table C.1 Continued
Ceramic tile: Summary data concerning the U.S. market, by item and period
Quantity=1,000 square feet; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per square foot; Period changes=percent--exceptions noted; Interim period is January through September

	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year			Interim
Item	2021	2022	2023	2023	2024	2021–23	2021-22	2022–23	2023–24
U.S. producers':									
Practical capacity quantity	1,003,486	1,030,159	1,054,254	794,246	771,861	▲5.1	▲2.7	▲2.3	▼(2.8)
Production quantity	891,535	896,036	868,932	666,950	606,962	▼(2.5)	▲0.5	▼(3.0)	▼(9.0)
Capacity utilization (fn1)	88.8	87.0	82.4	84.0	78.6	▼(6.4)	▼(1.9)	▼(4.6)	▼(5.3)
U.S. shipments:									
Quantity	854,822	861,750	801,728	609,318	553,569	▼(6.2)	▲0.8	▼(7.0)	▼(9.1)
Value	1,229,590	1,347,628	1,326,004	1,010,830	948,519	▲7.8	▲9.6	▼(1.6)	▼(6.2)
Unit value	$1.44	$1.56	$1.65	$1.66	$1.71	▲15.0	▲8.7	▲5.8	▲3.3
Export shipments:									
Quantity	11,408	15,019	14,560	11,558	10,174	▲27.6	▲31.7	▼(3.1)	▼(12.0)
Value	19,404	26,704	27,995	21,018	21,161	▲44.3	▲37.6	▲4.8	▲0.7
Unit value	$1.70	$1.78	$1.92	$1.82	$2.08	▲13.0	▲4.5	▲8.1	▲14.4
Ending inventory quantity	299,878	299,183	322,249	314,994	346,365	▲7.5	▼(0.2)	▲7.7	▲10.0
Inventories/total shipments (fn1)	34.6	34.1	39.5	38.1	46.1	▲4.9	▼(0.5)	▲5.4	▲8.0
Production workers	3,665	3,765	3,958	3,988	4,117	▲8.0	▲2.7	▲5.1	▲3.2
Hours worked (1,000s)	7,524	7,514	7,920	6,103	8,695	▲5.3	▼(0.1)	▲5.4	▲42.5
Wages paid ($1,000)	210,969	224,081	243,451	186,723	208,298	▲15.4	▲6.2	▲8.6	▲11.6
Hourly wages (dollars per hour)	$28.04	$29.82	$30.74	$30.60	$23.96	▲9.6	▲6.4	▲3.1	▼(21.7)
Productivity (square feet per hour)	118.5	119.2	109.7	109.3	69.8	▼(7.4)	▲0.6	▼(8.0)	▼(36.1)
Unit labor costs	$0.24	$0.25	$0.28	$0.28	$0.34	▲18.4	▲5.7	▲12.0	▲22.6
Net sales:									
Quantity	866,230	876,769	816,288	620,875	563,744	▼(5.8)	▲1.2	▼(6.9)	▼(9.2)
Value	1,248,994	1,374,332	1,353,998	1,031,808	969,680	▲8.4	▲10.0	▼(1.5)	▼(6.0)
Unit value	$1.44	$1.57	$1.66	$1.66	$1.72	▲15.0	▲8.7	▲5.8	▲3.5
Cost of goods sold (COGS)	828,068	925,771	923,179	724,020	682,151	▲11.5	▲11.8	▼(0.3)	▼(5.8)
Gross profit or (loss) (fn2)	420,926	448,561	430,819	307,788	287,529	▲2.4	▲6.6	▼(4.0)	▼(6.6)
SG&A expenses	352,151	383,519	402,386	301,475	300,232	▲14.3	▲8.9	▲4.9	▼(0.4)
Operating income or (loss) (fn2)	68,775	65,042	28,433	6,313	(12,703)	▼(58.7)	▼(5.4)	▼(56.3)	▼—
Net income or (loss) (fn2)	54,367	51,005	(3,989)	(19,926)	(47,285)	▼—	▼(6.2)	▼—	▼—
Unit COGS	$0.96	$1.06	$1.13	$1.17	$1.21	▲18.3	▲10.5	▲7.1	▲3.8
Unit SG&A expenses	$0.41	$0.44	$0.49	$0.49	$0.53	▲21.3	▲7.6	▲12.7	▲9.7
Unit operating income or (loss) (fn2)	$0.08	$0.07	$0.03	$0.01	$(0.02)	▼(56.1)	▼(6.6)	▼(53.0)	▼—
Unit net income or (loss) (fn2)	$0.06	$0.06	$(0.00)	$(0.03)	$(0.08)	▼—	▼(7.3)	▼—	▼—
COGS/sales (fn1)	66.3	67.4	68.2	70.2	70.3	▲1.9	▲1.1	▲0.8	▲0.2
Operating income or (loss)/sales (fn1)	5.5	4.7	2.1	0.6	(1.3)	▼(3.4)	▼(0.8)	▼(2.6)	▼(1.9)
Net income or (loss)/sales (fn1)	4.4	3.7	(0.3)	(1.9)	(4.9)	▼(4.6)	▼(0.6)	▼(4.0)	▼(2.9)
Capital expenditures	42,032	147,186	225,748	169,550	50,206	▲437.1	▲250.2	▲53.4	▼(70.4)
Research and development expenses	13,323	21,899	25,062	18,680	18,460	▲88.1	▲64.4	▲14.4	▼(1.2)
Total assets	2,194,368	2,009,441	2,082,081	NA	NA	▼(5.1)	▼(8.4)	▲3.6	NA

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series. Value data reflect landed duty-paid values. 508-compliant tables containing these data are contained in parts 3, 4, 6, and 7 of this report.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "—". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

fn1.--Reported data are in percent and period changes are in percentage points.
fn2.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

APPENDIX D

NONSUBJECT COUNTRY PRICE DATA

Ten importers reported price data for Brazil, Italy, Mexico, and Spain for products 1-4. Price data reported by these firms accounted for 15.8 percent of U.S. commercial shipments from Brazil, Italy, Mexico, and Spain. These price items and accompanying data are comparable to those presented in tables 5.4 to 5.7. Price and quantity data for Brazil, Italy, Mexico, and Spain are shown in tables D.1 to D.4 and in figures D.1 to D.4 (with domestic and subject sources).

In comparing nonsubject country pricing data with U.S. producer pricing data, prices for product imported from Brazil, Italy, Mexico, and Spain were lower than prices for U.S.-produced product in 57 instances and higher in 155 instances. In comparing nonsubject country pricing data with subject country pricing data, prices for product imported from Brazil, Italy, Mexico, and Spain were lower than prices for product imported from India in 44 instances and higher in 118 instances. A summary of price differentials is presented in table D.5.

Table D.1 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Brazil price	Brazil quantity	Italy price	Italy quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Note: Product 1: Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table continued.

Table D.1 (Continued) Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Spain price	Spain quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure D.1 Ceramic tile: Weighted-average prices and quantities of domestic and imported product 1, by quarter

Price of product 1

* * * * * * *

Volume of product 1

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Porcelain tile, rectangular, 6”–8” in width by 24”–36” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table D.2 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Brazil price	Brazil quantity	Italy price	Italy quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Note: Product 2: Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table continued.

Table D.2 (Continued) Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Spain price	Spain quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure D.2 Ceramic tile: Weighted-average prices and quantities of domestic and imported product 2, by quarter

Price of product 2

* * * * * * *

Volume of product 2

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Porcelain tile, rectangular, 12” in width by 24” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table D.3 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Brazil price	Brazil quantity	Italy price	Italy quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Note: Product 3: Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table continued.

Table D.3 (Continued) Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Spain price	Spain quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 3: Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure D.3 Ceramic tile: Weighted-average prices and quantities of domestic and imported product 3, by quarter

Price of product 3

* * * * * * *

Volume of product 3

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 3: Non-porcelain ceramic tile, square or rectangular, 3”–6” in width by 6”–12” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table D.4 Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Brazil price	Brazil quantity	Italy price	Italy quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Note: Product 4: Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table continued.

Table D.4 (Continued) Ceramic tile: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 from nonsubject sources, by quarter

Price in dollars per square foot, quantity in 1,000 square feet, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Spain price	Spain quantity
2021 Q1	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 4: Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Figure D.4 Ceramic tile: Weighted-average prices and quantities of domestic and imported product 4, by quarter

Price of product 4

* * * * * * *

Volume of product 4

* * * * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 4: Porcelain tile, square or rectangular, 24”-48” in width by 24”-48” in length (excluding mosaic ceramic tile and finishing ceramic tile), sold to retailers

Table D.5 Ceramic tile: Summary of higher/(lower) unit values for nonsubject price data, by source, January 2021 through September 2024

Comparison source	Benchmark source	Number of quarters lower	Quantity lower	Number of quarters higher	Quantity higher
Brazil	United States	***	***	***	***
Brazil	India	***	***	***	***
Italy	United States	***	***	***	***
Italy	India	***	***	***	***
Mexico	United States	***	***	***	***
Mexico	India	***	***	***	***
Spain	United States	***	***	***	***
Spain	India	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

APPENDIX E

U.S. PRODUCERS' AND U.S. IMPORTERS' MONTHLY AVERAGE UNIT VALUE

Table E-1 Ceramic tile: U.S. producers' U.S. shipments and U.S. imports average unit value, by source and month

Unit values in dollars per square foot

Year	Month	U.S. producers	India	Nonsubject sources	All import sources
2021	January	1.41	0.74	1.08	1.03
2021	February	1.43	0.72	1.05	1.01
2021	March	1.42	0.71	1.03	0.99
2021	April	1.43	0.75	1.14	1.11
2021	May	1.43	0.71	1.13	1.08
2021	June	1.46	0.78	1.21	1.18
2021	July	1.47	0.74	1.24	1.20
2021	August	1.47	0.76	1.24	1.19
2021	September	1.44	0.79	1.17	1.13
2021	October	1.44	0.76	1.15	1.11
2021	November	1.43	0.81	1.18	1.15
2021	December	1.43	0.84	1.26	1.23
2022	January	1.55	0.80	1.29	1.23
2022	February	1.50	0.86	1.31	1.27
2022	March	1.53	0.76	1.35	1.27
2022	April	1.59	0.89	1.32	1.29
2022	May	1.58	0.90	1.41	1.34
2022	June	1.59	0.93	1.49	1.42
2022	July	1.63	0.93	1.49	1.40
2022	August	1.55	0.93	1.55	1.48
2022	September	1.58	0.90	1.46	1.37
2022	October	1.58	0.86	1.42	1.34
2022	November	1.55	0.80	1.46	1.36
2022	December	1.54	0.76	1.40	1.32

Table continued.

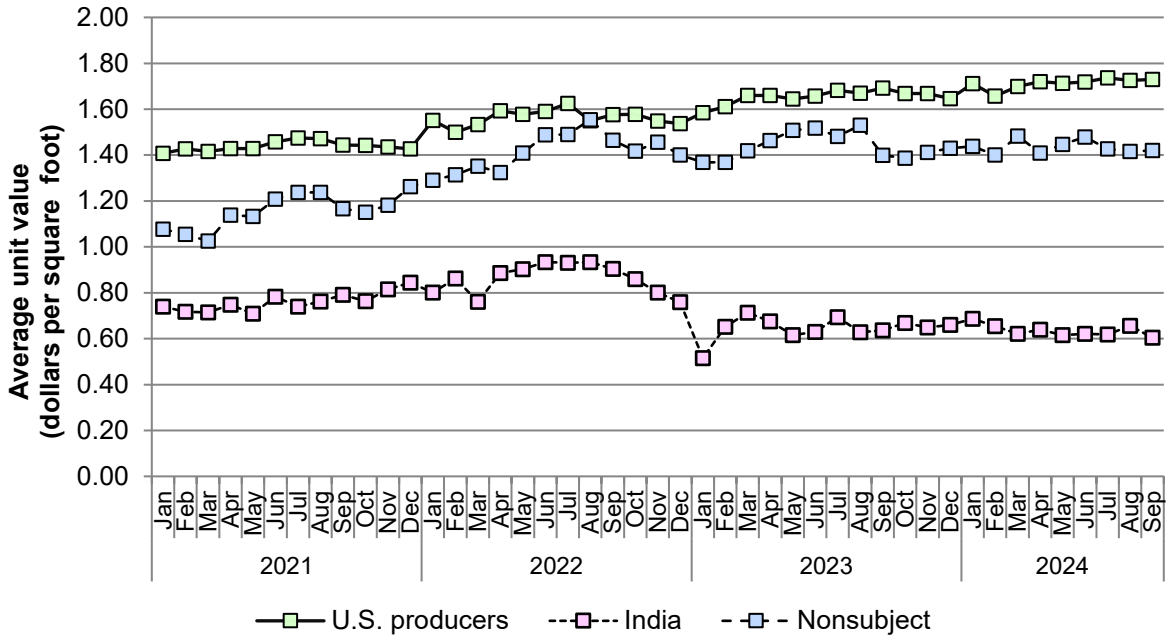
Table E-1 (Continued) Ceramic tile: U.S. producers' U.S. shipments and U.S. imports average unit value, by source and month

Unit values in dollars per square foot

Year	Month	U.S. producers	India	Nonsubject sources	All import sources
2023	January	1.58	0.52	1.37	1.17
2023	February	1.61	0.65	1.37	1.26
2023	March	1.66	0.71	1.42	1.31
2023	April	1.66	0.67	1.46	1.32
2023	May	1.64	0.62	1.51	1.30
2023	June	1.66	0.63	1.52	1.33
2023	July	1.68	0.69	1.48	1.35
2023	August	1.67	0.63	1.53	1.35
2023	September	1.69	0.64	1.40	1.21
2023	October	1.67	0.67	1.39	1.24
2023	November	1.67	0.65	1.41	1.23
2023	December	1.65	0.66	1.43	1.28
2024	January	1.71	0.69	1.44	1.28
2024	February	1.66	0.65	1.40	1.26
2024	March	1.70	0.62	1.48	1.29
2024	April	1.72	0.64	1.41	1.23
2024	May	1.71	0.61	1.45	1.25
2024	June	1.72	0.62	1.48	1.24
2024	July	1.74	0.62	1.43	1.24
2024	August	1.73	0.66	1.42	1.30
2024	September	1.73	0.60	1.42	1.29

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series. Import value data reflect landed duty paid value.

Figure E.1 Ceramic tile: U.S. producers' U.S. shipments and U.S. importers' average unit value, by source and month



Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed February 10. 2025. Imports are based on the imports for consumption data series. Import value data reflect landed duty paid value.

APPENDIX F

U.S. IMPORTERS' U.S. SHIPMENTS OF IMPORTS FROM NONSUBJECT SOURCES

BY TYPE

Table F.1 Ceramic tile: U.S. importers' U.S. shipments from Brazil, by water permeability, 2023

Quantity in 1,000 square feet; share in percent

Water permeability	Quantity	Share
Porcelain	111,665	71.4
Non-porcelain	44,728	28.6
All water permeabilities	156,393	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table F.2 Ceramic tile: U.S. importers' U.S. shipments from Italy, by water permeability, 2023

Quantity in 1,000 square feet; share in percent

Water permeability	Quantity	Share
Porcelain	92,513	96.1
Non-porcelain	3,755	3.9
All water permeabilities	96,268	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table F.3 Ceramic tile: U.S. importers' U.S. shipments from Mexico, by water permeability, 2023

Quantity in 1,000 square feet; share in percent

Water permeability	Quantity	Share
Porcelain	18,401	10.6
Non-porcelain	154,630	89.4
All water permeabilities	173,031	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table F.4 Ceramic tile: U.S. importers' U.S. shipments from Spain, by water permeability, 2023

Quantity in 1,000 square feet; share in percent

Water permeability	Quantity	Share
Porcelain	138,605	97.3
Non-porcelain	3,882	2.7
All water permeabilities	142,487	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table F.5 Ceramic tile: U.S. importers' U.S. shipments from all other sources, by water permeability, 2023

Quantity in 1,000 square feet; share in percent

Water permeability	Quantity	Share
Porcelain	254,400	68.9
Non-porcelain	115,085	31.1
All water permeabilities	369,485	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table F.6 Ceramic tile: U.S. importers' U.S. shipments from Brazil, by type, polish, and side precision, 2023

Quantity in 1,000 square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table F.6 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Brazil, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table F.6 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Brazil, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table F.6 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Brazil, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table F.7 Ceramic tile: U.S. importers' U.S. shipments from Italy, by type, polish, and side precision, 2023

Quantity in 1,000 square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table F.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Italy, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table F.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Italy, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table F.7 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Italy, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table F.8 Ceramic tile: U.S. importers' U.S. shipments from Mexico, by type, polish, and side precision, 2023

Quantity in 1,000 square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table F.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Mexico, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table F.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Mexico, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table F.8 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Mexico, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table F.9 Ceramic tile: U.S. importers' U.S. shipments from Spain, by type, polish, and side precision, 2023

Quantity in 1,000 square feet

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	***

Table continued.

Table F.9 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Spain, by type, polish, and side precision, 2023

Share across in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	100.0
Large non-mosaic: Matte	***	***	100.0
Small and medium non-mosaic: Polished	***	***	100.0
Small and medium non-mosaic: Matte	***	***	100.0
Mosaic: Polished	***	***	100.0
Mosaic: Matte	***	***	100.0
All large non-mosaic	***	***	100.0
All small and medium non-mosaic	***	***	100.0
All mosaic	***	***	100.0
All polished	***	***	100.0
All matte	***	***	100.0
All types and polishes	***	***	100.0

Table continued.

Table F.9 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Spain, by type, polish, and side precision, 2023

Share down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	100.0	100.0	100.0

Table continued.

Table F.9 (Continued) Ceramic tile: U.S. importers' U.S. shipments from Spain, by type, polish, and side precision, 2023

Share across and down in percent

Type and polish	Rectified	Non-rectified	All side precisions
Large non-mosaic: Polished	***	***	***
Large non-mosaic: Matte	***	***	***
Small and medium non-mosaic: Polished	***	***	***
Small and medium non-mosaic: Matte	***	***	***
Mosaic: Polished	***	***	***
Mosaic: Matte	***	***	***
All large non-mosaic	***	***	***
All small and medium non-mosaic	***	***	***
All mosaic	***	***	***
All polished	***	***	***
All matte	***	***	***
All types and polishes	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

APPENDIX G

HISTORICAL U.S. IMPORTS

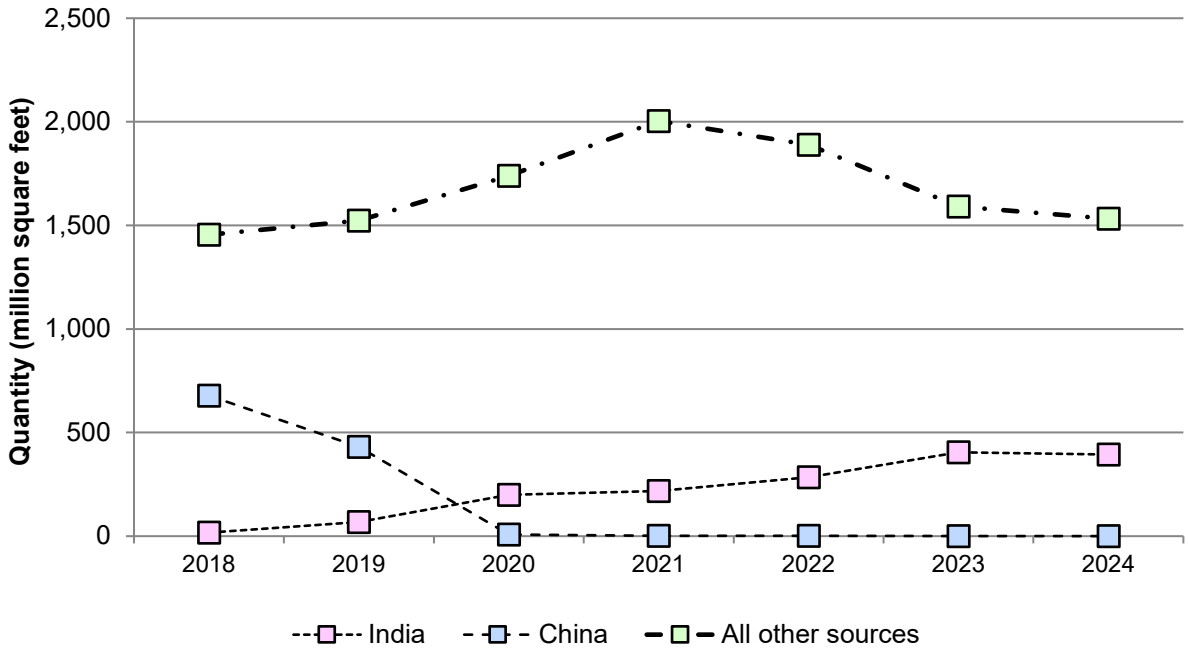
Table G.1 Ceramic tile: U.S. importers' annual imports from India, China, and all other sources, 2018 to 2024 and January to February 2025

Quantity in 1,000 square feet

Source	2018	2019	2020	2021	2022	2023	2024	2025
India	17,168	67,808	200,141	217,789	283,919	404,825	394,001	42,698
China	678,269	431,502	7,723	2,211	1,676	631	716	125
All other sources	1,454,941	1,523,974	1,738,851	2,004,066	1,889,811	1,590,870	1,532,688	279,327
All import sources	2,150,378	2,023,284	1,946,716	2,224,066	2,175,405	1,996,326	1,927,405	322,149

Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011, and 6907.40.9051, accessed April 21, 2025. Imports are based on the imports for consumption data series.

Figure G.1 Ceramic tile: U.S. imports by source, 2018-2024



Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 6907.21.1005, 6907.21.1011, 6907.21.1051, 6907.21.2000, 6907.21.3000, 6907.21.4000, 6907.21.9011, 6907.21.9051, 6907.22.1005, 6907.22.1011, 6907.22.1051, 6907.22.2000, 6907.22.3000, 6907.22.4000, 6907.22.9011, 6907.22.9051, 6907.23.1005, 6907.23.1011, 6907.23.1051, 6907.23.2000, 6907.23.3000, 6907.23.4000, 6907.23.9011, 6907.23.9051, 6907.30.1005, 6907.30.1011, 6907.30.1051, 6907.30.2000, 6907.30.3000, 6907.30.4000, 6907.30.9011, 6907.30.9051, 6907.40.1005, 6907.40.1011, 6907.40.1051, 6907.40.2000, 6907.40.3000, 6907.40.4000, 6907.40.9011,

and 6907.40.9051, accessed April 21, 2025. Imports are based on the imports for consumption data series.