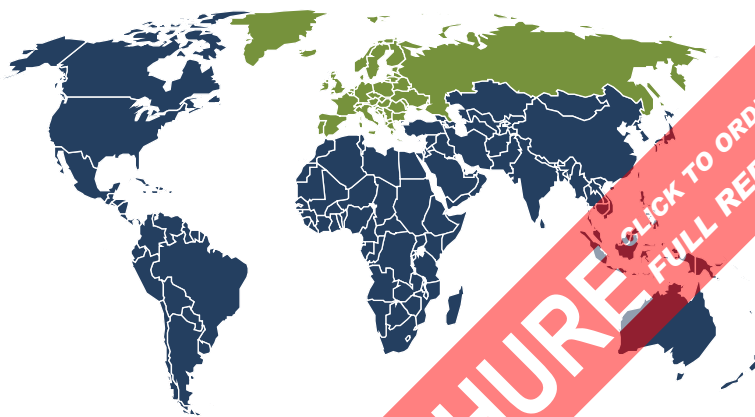




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Hard Surface Flooring: Europe

October 2021



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About This Report

Scope

This report forecasts to 2024 hard surface flooring demand and production in square meters in Europe. Total demand is segmented by product in terms of:

- ceramic
- laminate
- wood
- other nonresilient flooring such as porcelain tile and slab, stone, and seamless
- vinyl
- other resilient flooring such as linoleum, rubber, and asphalt

Total demand is also segmented by market as follows:

- nonresidential
- residential
- vehicle and nonbuilding

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; production and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Hard surface flooring is considered finish flooring and is installed over top of the subfloor for functional or decorative purposes. It can be broadly discussed as either nonresilient or resilient.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 6 | Countries in Western Europe

Major Hard Surface Flooring Markets	Other Western Europe		
France	Andorra	Greenland	Monaco
Germany	Austria	Guernsey	Netherlands
Italy	Belgium	Iceland	Norway
Spain	Channel Islands	Ireland	Portugal
United Kingdom	Denmark	Isle of Man	Saint Pierre and Miquelon
	Faeroe Islands	Jersey	San Marino
	Finland	Liechtenstein	Sweden
	Gibraltar	Luxembourg	Switzerland
	Greece	Malta	Vatican City

Source: The Freedonia Group

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

*Major hard surface flooring market.

Source: The Freedonia Group

Sources

Hard Surface Flooring: Europe (FE60047) is based on *Global Hard Surface Flooring*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | HS Codes Related to Hard Surface Flooring

HS Code	Definition
3918.10	Floor, wall or ceiling coverings; of polymers of vinyl chloride, whether or not self-adhesive, in rolls or in the form of tile
4409	Wood (including strips, friezes for parquet flooring, not assembled), continuously shaped (tongued, grooved, v-jointed, beaded or the like) along any edges, ends or faces, whether or not planed, sanded or end-jointed
5701	Carpets and other textile floor coverings; knotted, whether or not made up
5702	Carpets and other textile floor coverings; woven, (not tufted or flopped), whether or not made up, including "Kelem", "Schumacks", "Karamanie" and similar hand-woven rugs
5703	Carpets and other textile floor coverings; tufted, whether or not made up
5704	Carpets and other textile floor coverings; of felt, (not tufted or flopped), whether or not made up
5705	Carpets and other textile floor coverings; n.e.c.
5904.10	Linoleum, whether or not cut to shape
6907	Ceramic flags and paving, hearth or wall tiles; ceramic mosaic cubes and the like, whether or not on a backing; finishing ceramics

Source: United Nations Statistics Division

Table 9 | NACE Codes Related to Hard Surface Flooring

NACE Code	Definition
1393	Manufacture of carpets and rugs
1610	Sawmilling and planing of wood
1622	Manufacture of assembled parquet floors
2219	Manufacture of other rubber products
2223	Manufacture of builders' ware of plastic
2331	Manufacture of ceramic tiles and flags
2370	Cutting, shaping and finishing of stone

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a

market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Hard Surface Flooring

Freedonia Industry Studies

Ceilings

Decorative Tile

Fiber Cement in the US

Flooring

Global Drywall & Building Plaster

Global Fiber Cement

Global Housing

Global Insulation

Global Prefabricated Housing

Global Roofing

Global Siding (Cladding)

Global Windows & Doors

Insulation

Moulding & Trim

Prefabricated Housing

Roofing

Siding

Freedonia Focus Reports

Carpets & Rugs: United States

Ceramic Tile: United States

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Decorative Laminates: Europe

Flooring: Europe

Motor Vehicles: Europe

Porcelain Tile: United States

Rubber Processing Chemicals: Europe

Thermoplastic Elastomers: Europe

Transport Equipment: United States

Vinyl Flooring: United States

Wood Flooring: United States

Wood Millwork: United States

Freedonia Custom Research

Trade Publications

Floor Covering News
Floor Covering Weekly
Floor Daily
Floor Trends
RUG INSIDER
Rug News and Design

Agencies & Associations

Association of European Producers of Laminate Flooring (EPLF)
The Carpet and Rug Institute
The European Carpet and Rug Association
Eurostat
FEP (European Federation of the Parquet Industry)
International Monetary Fund
MMFA – Multilayer Modular Flooring Association
Multilayer Flooring Association
National Wood Flooring Association
Organisation for Economic Co-operation and Development
Resilient Floor Covering Institute
Russian Federal State Statistics Service
Statistics Poland
United Nations Comtrade
World Bank