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Flooring: Europe

April 2021



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About This Report

Scope

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

- nonresilient
- carpets and rugs
- resilient

Total demand is also segmented by market as follows:

- nonresidential
- residential
- transportation equipment and other markets such as nonbuilding

Total flooring production is also segmented by product in terms of:

- hard surface flooring
- carpets and rugs

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.

For purposes of this report, flooring is any finish material installed over a floor structure to provide a walking surface and is synonymous with floor covering. Excluded from the scope of this report are subfloors, floor underlayment, and polished concrete.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, 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:

About This Report

Table 6 | Countries in Western Europe

| | | | |
|-----------------|-------------|---------------|---------------------------|
| Andorra | Germany* | Italy* | Portugal |
| Austria | Gibraltar | Jersey | Saint Pierre and Miquelon |
| Belgium | Greece | Liechtenstein | San Marino |
| Channel Islands | Greenland | Luxembourg | Spain* |
| Denmark | Guernsey | Malta | Sweden |
| Faeroe Islands | Iceland | Monaco | Switzerland |
| Finland | Ireland | Netherlands | United Kingdom* |
| France* | Isle of Man | Norway | Vatican City |

*Major flooring markets.

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 flooring market.

Source: The Freedonia Group

Sources

Flooring: Europe (FE60053) is based on *Global 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

About This Report

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 Flooring

| HS Code | Definition |
|---------|---|
| 391810 | 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 |
| 5701 | Carpets and other textile floor coverings; knotted, whether or not made up |
| 5702 | Carpets and other textile floor coverings; woven, (not tufted or flocked), 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 flocked), whether or not made up |
| 5705 | Carpets and other textile floor coverings; n.e.c. |
| 590410 | 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 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 Flooring

Freedonia Industry Studies

Flooring

Global Drywall & Building Plaster

Global Fiber Cement

Global Housing

Freedonia Focus Reports

Carpets & Rugs: United States

Cement: Europe

Construction: United States

Flooring: United States

Global Prefabricated Housing

Hard Surface Flooring: United States

Housing: United States

Paint & Coatings: Europe

Plumbing Fixtures & Fittings: Europe

Vinyl Flooring: United States

Wood Flooring: 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)

Eurostat

FEP (European Federation of the Parquet Industry)

MMFA – Multilayer Modular Flooring Association

Russian Federal State Statistics Service

The European Carpet and Rug Association

United Nations Comtrade