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US Collection

# Hard Surface Flooring: United States

October 2021



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# About This Report

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## Scope

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

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

Total demand is also segmented by market as follows:

- residential
- nonresidential
- 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.

## Sources

*Hard Surface Flooring: United States (FF60047)* 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 6 | NAICS & SIC Codes Related to Hard Surface Flooring**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
314110	Carpet and rug mills	2273	Carpets and rugs
321918	Other millwork (including flooring)	2426	Hardwood dimension and flooring mills
326199	All other plastics product manufacturing	3996	Linoleum, asphalted-felt-base, and other hard-surface floor covering, NECs
327120	Ceramic tiles, floor and wall, manufacturing	3253	Ceramic wall and floor tile

Source: US Census Bureau

## 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*

*Flooring: United States*

*Housing: United States*

*Motor Vehicles: United States*

*Porcelain Tile: United States*

*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

The Carpet and Rug Institute  
Multilayer Flooring Association  
National Wood Flooring Association  
North American Laminate Flooring Association  
Resilient Floor Covering Institute  
United States Census Bureau  
United States Environmental Protection Agency  
United States Green Building Council  
United States International Trade Commission