

Freedonia Focus Reports  
Global Collection



# Global Hard Surface Flooring

October 2021



**BROCHURE** CLICK TO ORDER  
**FULL REPORT** CLICK TO ORDER

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Global Overview &amp; Forecasts</b>	<b>5</b>
Impact of COVID-19 Pandemic on Hard Surface Flooring	5
Demand by Product	6
Ceramic	7
Wood	8
Laminate	9
Vinyl	10
Other Nonresilient Flooring	11
Other Resilient Flooring	11
Demand by Market	13
Residential	14
Nonresidential	15
Vehicle & Nonbuilding	16
<b>3. Regional Segmentation &amp; Forecasts</b>	<b>18</b>
Regional Production Overview	18
Regional Demand Overview	20
North America	22
Western Europe	24
Asia/Pacific	26
Other Regions	28
Central & South America	29
Eastern Europe	29
Africa/Mideast	29
<b>4. Industry Structure</b>	<b>31</b>
Industry Characteristics	31
Market Share	32
<b>5. About This Report</b>	<b>34</b>
Scope	34
Sources	34
Industry Codes	35
Freedonia Methodology	35
Resources	37

# List of Tables & Figures

---

Figure 1   Global Hard Surface Flooring Market Outlook, 2019 – 2024	4
Figure 2   Global Hard Surface Flooring Demand by Product, 2009 – 2024 (bil sq mtr)	6
Table 1   Global Hard Surface Flooring Demand by Product, 2009 – 2024 (mil sq mtr)	6
Figure 3   Global Hard Surface Flooring Demand by Product, 2009 – 2024 (%)	12
Figure 4   Global Hard Surface Flooring Demand by Market, 2009 – 2024 (bil sq mtr)	13
Table 2   Global Hard Surface Flooring Demand by Market, 2009 – 2024 (mil sq mtr)	13
Figure 5   Global Hard Surface Flooring Demand by Market, 2009 – 2024 (%)	17
Figure 6   Global Hard Surface Flooring Production by Region, 2009 – 2024 (bil sq mtr)	18
Table 3   Global Hard Surface Flooring Production by Region, 2009 – 2024 (mil sq mtr)	18
Figure 7   Global Hard Surface Flooring Production by Region, 2009 – 2024 (%)	19
Figure 8   Global Hard Surface Flooring Demand by Region, 2009 – 2024 (bil sq mtr)	20
Table 4   Global Hard Surface Flooring Demand by Region, 2009 – 2024 (mil sq mtr)	20
Figure 9   Global Hard Surface Flooring Demand by Region, 2009 – 2024 (%)	21
Figure 10   North America: Hard Surface Flooring Demand by Product, 2009 – 2024 (mil sq mtr)	22
Figure 11   North America: Hard Surface Flooring Demand by Market, 2009 – 2024 (mil sq mtr)	22
Table 5   North America: Hard Surface Flooring Demand by Product & Market, 2009 – 2024 (mil sq mtr)	23
Figure 12   Western Europe: Hard Surface Flooring Demand by Product, 2009 – 2024 (mil sq mtr)	24
Figure 13   Western Europe: Hard Surface Flooring Demand by Market, 2009 – 2024 (mil sq mtr)	24
Table 6   Western Europe: Hard Surface Flooring Demand by Product & Market, 2009 – 2024 (mil sq mtr)	25
Figure 14   Asia/Pacific: Hard Surface Flooring Demand by Product, 2009 – 2024 (bil sq mtr)	26
Figure 15   Asia/Pacific: Hard Surface Flooring Demand by Market, 2009 – 2024 (bil sq mtr)	26
Table 7   Asia/Pacific: Hard Surface Flooring Demand by Product & Market, 2009 – 2024 (mil sq mtr)	27
Figure 16   Other Regions: Hard Surface Flooring Demand by Region, 2009 – 2024 (mil sq mtr)	28
Figure 17   Other Regions: Hard Surface Flooring Demand by Product, 2009 – 2024 (mil sq mtr)	28
Table 8   Other Regions: Hard Surface Flooring Demand by Region & Product, 2009 – 2024 (mil sq mtr)	30
Figure 18   Global Hard Surface Flooring Market Share by Company, 2019 (%)	33
Table 9   NAICS & SIC Codes Related to Hard Surface Flooring	35
Table 10   HS Codes Related to Hard Surface Flooring	35

# About This Report

---

## Scope

This report forecasts to 2024 global demand for hard surface flooring by product, market, and major world region in square meters. Product segments include:

- ceramic
- wood
- laminate
- vinyl
- other nonresilient flooring products such as seamless flooring, bamboo flooring, and porcelain tiles and slabs
- other resilient flooring products such as linoleum, rubber, cork, and asphalt

Reported markets encompass:

- residential
- nonresidential
- vehicles and nonbuilding

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2009, 2014, and 2019. Finally, global production is segmented by major world region and provided for 2009, 2014, 2019, and 2024.

Other various topics are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Global Hard Surface Flooring* (FW60047) is based on [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 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 9 | 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

**Table 10 | 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

## 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.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Hard Surface Flooring*

### Freedonia Industry Studies

*Ceilings*

*Decorative Tile*

*Fiber Cement in the US*

*Flooring*

*Global Carpets & Rugs*

*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*

*Flooring: United States*

*Hard Surface Flooring: United States*

*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

ABRIC (Brazilian Association of the Carpet Industry)  
ANFACER (Brazilian Association of Manufacturers of Ceramic Tiles, Sanitary Ware, and Related Products)  
ANPM – National Hardwood Flooring Association (Brazil)  
Association of European Producers of Laminate Flooring (EPLF)  
Bureau of Foreign Trade (Taiwan)  
China Arts and Crafts Association  
China Building Ceramics & Sanitaryware Association  
Carpet and Rug Institute (North America)  
The European Carpet and Rug Association  
Eurostat  
FEP (European Federation of the Parquet Industry)  
Instituto Brasileiro de Geografia e Estatística  
Instituto Nacional de Estadística y Geografía (Mexico)  
Ministry of Economy, Trade, and Industry (Japan)  
MMFA – Multilayer Modular Flooring Association (Europe)  
Multilayer Flooring Association (United States)  
National Wood Flooring Association  
North American Laminate Flooring Association  
Resilient Floor Covering Institute (North America)  
Russian Federal State Statistics Service  
Statistics Canada  
Statistics Poland  
United Nations Comtrade  
United States Census Bureau  
United States International Trade Commission