World Flooring & Carpets

Industry Study with Forecasts for **2012 & 2017**

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Industry Study with Forecasts for ***2012 & 2017***

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World Flooring & Carpets

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World flooring and carpet demand will be stimulated by continued growth in nonresidential building construction as industrialization efforts continue in less developed parts of the world.

Global demand to rise 4% annually through 2012

World demand for flooring and carpets is projected to climb 4.0 percent annually through 2012 to 15.2 billion square meters, valued at $178 billion. Product demand will be stimulated by continued growth in nonresidential building construction as industrialization efforts continue in less developed parts of the world. China will record the largest gains of any country and will expand its lead as the biggest floor covering market in the world. China will account for 43 percent of the difference in worldwide flooring demand between 2007 and 2012, and one-half of the increase in flooring shipments. Sales growth is also expected to be strong in India, as well as in lower-volume markets in the developing world.

Flooring and carpet demand in developed parts of the world will rise as well, although the pace of increase will be less robust than in developing countries. Demand in both Western Europe and Japan will decelerate slightly from their already moderate paces of the 2002-2007 period. Market gains in these areas will be restrained by unspectacular economic growth and the general maturity of the markets. In the US, flooring and carpet sales will be spurred by an expected rebound in residential construction from the 2007 level, along with increases in nonresidential construction spending and motor vehicle production.

World Flooring & Carpet Demand
(15.2 billion square meters, 2012)

Nonresilient flooring to offer best opportunities

Nonresilient flooring (e.g., ceramic, wood, laminate) is by far the most popular type of floor covering worldwide, and demand will outpace that for both resilient flooring (which includes vinyl, linoleum and rubber products) and carpet and rugs through 2012. Nonresilient flooring demand will be driven by the products' durability and ease of maintenance, and supported by growing consumer preference for high-end and natural hard surface flooring products as income levels climb. Suppliers of carpets and rugs, the second most widely used type of floor covering, will benefit from growth in building construction expenditures in Western Europe, rising construction activity in other parts of the world and, to a lesser extent, growth in global motor vehicle production. Demand for resilient flooring, which accounts for the remainder of floor covering sales, will be stimulated by its comparatively low cost, as well as by favorable performance characteristics like high underfoot comfort, noise absorption, durability and wear resistance.

Residential building applications will continue to dominate overall flooring and carpet demand through 2012, although gains will be limited by a deceleration in residential building construction spending in some parts of the world.

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Industry Study with Forecasts for ***2012 & 2017***

Sample Text, Table & Chart

TABLE VI-7

INDIA
FLOORING & CARPETS MARKET ENVIRONMENT

Item	1997	2002	2007	2012	2017
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2006$)					
$ building construction/000$ GDP					
Bldg Construction Expend (bil 2006$)					
Residential					
Nonresidential					
m² flooring/capita					
m² flooring/mil $ GDP					
m² flooring/000$ bldg construction					
Flooring & Carpet Demand (mil m²)					
% India					
Asia/Pac Floor & Carpet Mkt (mil m²)					

SAMPLE TABLE

ASIA/PACIFIC

Nonetheless, over the past decade strong economic grow
has fostered the emergence of a large middle class, and the ri
capita income has aided flooring demand. From 1997 to 200
of the Indian market for flooring and carpets more than doub
nual growth approaching eight percent. Flooring and carpet
ers have benefited from economic reforms that have attracted
capital into the country, helping to spur industrialization-rela
dential and residential building construction activity. Advanc
production of motor vehicles and other transportation equipm
also contributed to growth in flooring demand. Nonresilient
accounted for the majority of the market in India in 2007, wi
57 percent. Textile floor coverings had the second largest sha

Demand for flooring and carpets in India is forecast to a
percent per year through 2012 t ... rs.
growth will be in line with the ... e and will
remain substantially above the ... omic growth
in India will support building c ... n turn will
generate demand for flooring. ... ng in transpor-
tation equipment is expected to ... growth as the
Indian motor vehicle industry co...

SAMPLE TEXT

India was the third largest producer of flooring and carpets in the Asia/Pacific region in 2007, with its shipments of 505 million square meters trailing only China and Japan. The nation's manufacturers supply all of the major product types, although ceramic tile, handwoven rugs and machine-made carpeting account for the bulk of industry output. India is also a sizable international source of supply, with a trade surplus equivalent to roughly one-sixth of domestic shipments in 2007. Leading export markets include the country's regional neighbors, Western Europe, the US and the Middle East.

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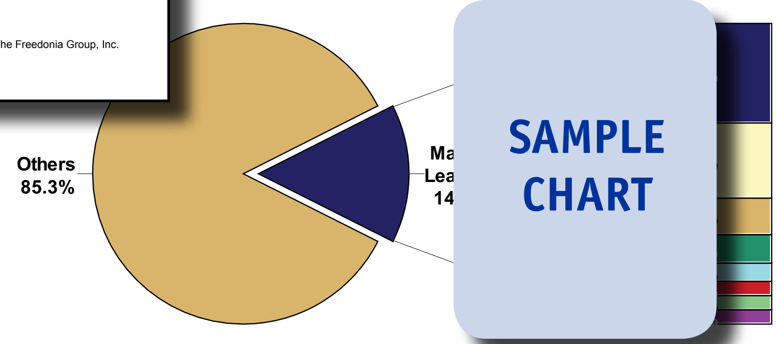
CHART VIII-1

WORLD FLOORING & CARPET MARKET SHARE BY COMPANY, 2007 ($139 billion)



SAMPLE CHART

World Flooring & Carpets

Industry Study with Forecasts for ***2012 & 2017***

Sample Profile, Table & Forecast

TABLE VI-8

INDIA FLOORING & CARPET SUPPLY & DEMAND
(million square meters)

Item	1997	2002	2007	2012	2017
Bldg Construction Expend (bil 2006$)	14[illegible]				[illegible]7.1
m² flooring/000$ bldg construction	1[illegible]				[illegible]6
Flooring & Carpet Demand	[illegible]				[illegible]0
By Product:					
Nonresilient Flooring					[illegible]0
Resilient Flooring					[illegible]5
Carpets & Rugs					[illegible]5
By Market:					
Residential Buildings					[illegible]5
Nonresidential Buildings					[illegible]5
Transportation Equipment & Other					[illegible]0
net exports					[illegible]0
Flooring & Carpet Shipments	281	[illegible]	[illegible]	[illegible]	960

SAMPLE TABLE

COMPANY PROFILES

Cooperativa Ceramica d'Imola arl
Via Vittorio Veneto 13
40026 Imola
Italy
39-0542-601-[illegible]
http://www.im[illegible]

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Cooperativa Ceramica d'Imola is a manufacturer of ceramic and porcelain floor and wall tiles. The privately held company offers over 100 tile designs for residential, commercial and industrial applications.

The Company's floor tile products include double-fired, single-fired, glazed porcelain and fine porcelain stoneware types. In addition, the Company manufactures tile slabs for steps and window ledges. Cooperativa Ceramica d'Imola's floor tiles are mainly available under the ARKIM and IMOLA CERAMICA brand names.

Cooperativa Ceramica d'Imola's ARKIM full-body porcelain stoneware floor tiles are suitable for residential, commercial and industrial applications. These tiles, which are produced in sizes ranging from 10 centimeters (cm) by 10 cm to 60 cm by 120 cm, offer extreme hardness and resistance to frost, wear and tear, and chemical agents. ARKIM floor tiles are available with a variety of finishes, including unpolished, polished, shined and rustic. Moreover, some ARKIM tiles feature anti-slip properties. Specific collections in it's ARKIM range include ALTAIR, CLIMBER, MOSAICO, DE NATURA, KRIPTON

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"Shipments of flooring and carpets from India are projected to rise 6.9 percent per annum through 2012 to 705 million square meters. While that pace will be slightly slower than growth in demand, India's trade surplus will increase modestly. Rising domestic demand will support Indian manufacture of flooring products. India's strong market growth will also ..."

--Section VI, pg. 165

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Other Studies

Wall Coverings

This study analyzes the US wall covering industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., ceramic tile, wallpaper, wall paneling, finished gypsum board), market (e.g., single-family, multifamily, manufactured housing, office and commercial, institutional, industrial), application (new construction, repair and improvement) and region. The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2473 .... 03/2009..................... $4600

Green Building Materials

This study analyzes the US market for environmentally preferable building materials. It presents historical market estimates (1998, 2003, 2008) and forecasts for 2013 and 2018 by green building material type (e.g., structural, exterior, interior), market (e.g., residential, nonresidential) and US geographic region (e.g., Northeast, Midwest, South, West). The study also considers market environment factors, details industry structure and profiles industry players.

#2459 .... 02/2009..................... $4700

World Textile Fibers

Global demand for manufactured fibers will rise 4.7% annually through 2012. Polyester will continue to dominate output while specialty products such as spandex, aramid and carbon fibers grow the fastest. The industry will remain concentrated in Asia, where the fastest growth is also expected. This study analyzes the 46 million metric ton world textile fiber industry, with forecasts for 2012 and 2017 by fiber type, world region and major country. It also evaluates company market share and profiles industry players.

#2402 .... 10/2008..................... $5700

Solid Surface Materials & Other Cast Polymers

US cast polymer demand will grow 3.6% annually through 2012. Gains will be driven by engineered stone based on its resistance to stains, impacts and moisture and its ability to have a wide range of colors and embedded materials. Solid surface products will remain the largest segment. This study analyzes the 222 million square foot US cast polymer industry, with forecasts for 2012 and 2017 by material, product, end use and regional market. It also evaluates company market share and profiles major players.

#2319 .... 04/2008..................... $4500

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 .... 01/2008..................... $4500

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