World Flooring & Carpets

Industry Study with Forecasts for **2014 & 2019**

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INDUSTRY STRUCTURE

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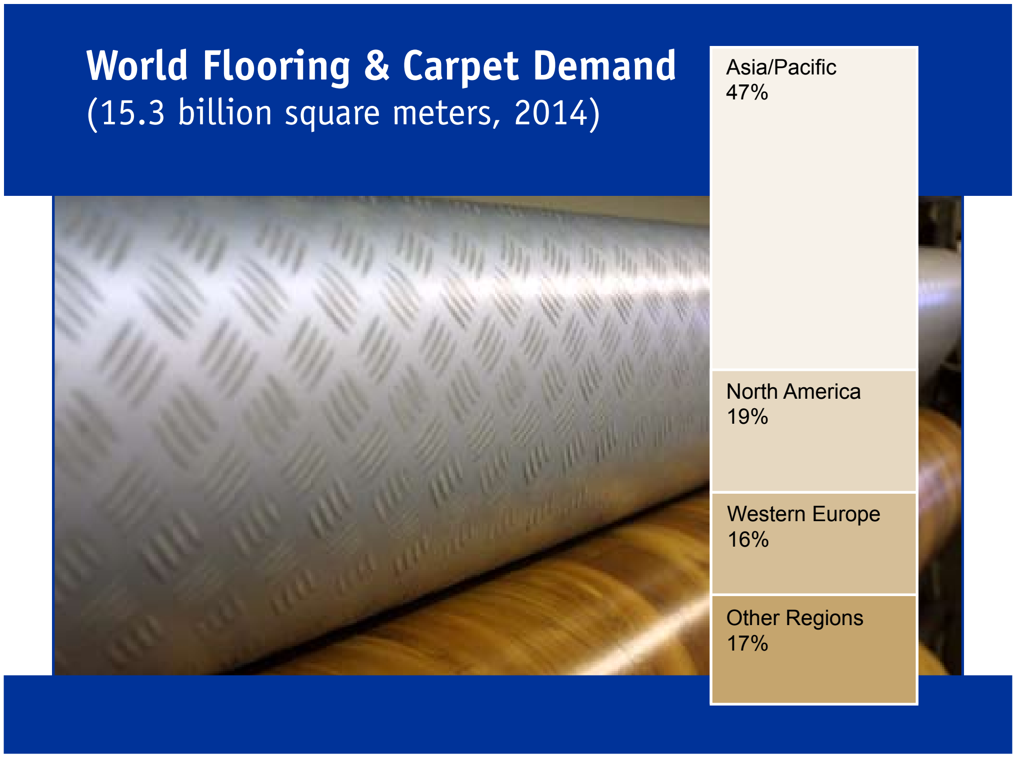
Market advances will be driven by acceleration in world residential building construction activity, and renewed strength in overall motor vehicle industry production.

Global demand to rise 5% annually through 2014

World demand for flooring and carpets is forecast to grow 5.0 percent annually through 2014 to 15.3 billion square meters. This will represent a noticeable improvement over market performance during the 2004-2009 period, when the 2009 global economic downturn depressed floor covering sales. In dollar terms, product demand will rise 6.5 percent per year to $204 billion. Market advances will be driven by acceleration in world residential building construction activity, supported by an upturn in spending in industrialized countries such as the US, and by healthy sales environments in a number of developing nations. Renewed strength in motor vehicle industry production after a period of decline will also contribute to overall flooring and carpet market growth.



Transportation/other market to grow the fastest

Flooring and carpet demand can be segmented into three markets: residential buildings, nonresidential buildings, and transportation equipment and other. The residential building market is by far the largest, accounting for more than half of all product sales in 2009, and the nonresidential building market is also huge. Floor covering use in transportation equipment and other nonbuilding applications (such as industrial equipment operator compartments and utility control rooms) accounts for only a modest share of the world demand total, but this market will record the fastest gains through 2014, primarily because of a robust increase in automotive industry output.

North America to register fastest sales gains

In a reversal of historical trends, North America will register the fastest sales gains of any region through 2014, largely because of a strong rebound in residential construction expenditures in the US, with double-digit annual increases in regional motor vehicle output also helping to bolster floor covering demand. Developing parts of Asia will post the next fastest advances, followed by the Africa/Mideast region, Central and South America and Eastern Europe. China alone will account for 38 percent of all additional sales through 2014, strengthening its position as the largest flooring and carpet market in the world in area terms. Growth is also expected to be healthy in lower-volume markets like Ukraine, India, Vietnam, Turkey and Thailand. Although increases will generally be not as strong as in North America or developing parts of the world, floor covering demand in Japan and Western Europe will climb as well. Growth in these areas will be fueled by renewed strength in new housing construction spending and transportation equipment production following a period of decline.

Sample Text, Table & Chart

TABLE VII-11

RUSSIA FLOORING & CARPET DEMAND BY PRODUCT & MARKET (million square meters)

Item	1999	2004	2009	2014	2019
East Europe Flooring/Carpet Demand					0
% Russia					5
Russia Flooring & Carpet Demand					0
By Product:					
Nonresilient Flooring					5
Resilient Flooring					0
Carpets & Rugs					5
By Market:					
Residential Buildings					6
Nonresidential Buildings					0
Transportation Equipment & Othe					4

SAMPLE TABLE

OTHER REGIONS

Russia: Flooring & Carpet Outlook & Supplier flooring and carpet market in Russia is forecast to increase per year to 330 million square meters in 2014, a deceleratio 2004-2009 period but about the same as projected gains for a whole. Product demand will be negatively impacted by d number of new housing units built as the country's populati to decrease, although the residential improvement and repai ing market will be somewhat more buoyant. In addition, m output is expected to nearly triple through 2014 as foreign i the industry grows, further boosting flooring and carpet sale 2011, for e ommercial production mobiles a burg, and in February announce ehicles in Russia thro venture a d Sollers.

SAMPLE TEXT

Prod ts by plants in Russia will rise 2.8 percent an million square meters, approximating increases in domestic demand but not climbing enough to prevent the nation's trade deficit in these products from widening. Producers will benefit from largely favorable market environments in Russia and neighboring East European countries, with production capacity gains aided by additional investment in local floor covering factories by foreign enterprises. To provide one example, in November 2009 Tarkett began manufacturing operations at a new laminate flooring plant near Moscow. However, industry output growth will be restricted somewhat by more intense competition from suppliers in other parts of Eastern Europe.

Russian manufacturers of floor coverings include such Dom Parketa, Euro-Ceramics, RBK-Laminat, Stroiplastmas plastpolymer. Among the foreign multinationals with local carpet production facilities are Forbo, Gruppo Concorde, Ka floor, Krono, Marazzi, Tarkett and VitrA Tiles.

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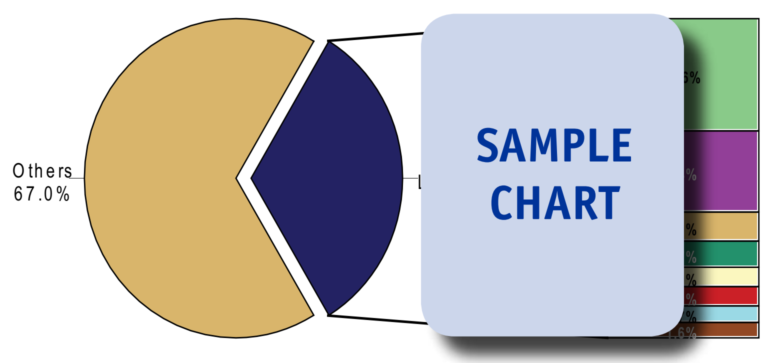
CHART VIII-4

WORLD CARPET & RUG MARKET SHARE BY COMPANY ($30.5 billion, 2009)



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Sample Profile, Table & Forecast

TABLE VII-10

RUSSIA FLOORING & CARPET SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008$)	1				175
per capita GDP					10
Population (million persons)	1				.6
Building Construction Expend (bil 2008					.2
Residential					.3
Nonresidential					.9
Housing Stock (mil units)					.8
Motor Vehicle Production (000 units)					00
m2 flooring/mil $ GDP					26
m2 flooring/capita					.9
m2 flooring/000$ construction					18
Flooring & Carpet Demand (mil m2)					00
net exports					70
Flooring & Carpet Production (mil m2)					30
% Russia					.0
Region Flooring & Carpet Prdn (mil m2)					50

SAMPLE TABLE

COMPANY PROFILES

Fritz Egger GmbH & Company
Holzwerkstoffe
Weiberndorf 20
St. Johann in Tirol 6380
Austria
43-50-60
http://wv

Sales: $ ... ny)
Employr ... npany)

Key Proc

SAMPLE PROFILE

Fritz Egger produces a variety of wood-based products, including medium density fiberboard, chipboard, oriented strandboard, melamine-faced boards, decorative laminates and laminate flooring. The privately held company conducts operations through three divisions: Furniture and Interior Design, Wood Construction, and Laminate Flooring.

The Company competes in the global flooring and carpet market via the Laminate Flooring division, which operates through the EGGER Retail Products GmbH & Company KG subsidiary (Germany). The firm produces laminate flooring, including the FLOORLINE collection made with WOODVISION two- and four-sided beveling; the VIVO collection produced by printing the decoration directly onto high density fiberboard (HDF) panels and applying an ecologically friendly, solvent-free coating; the EMOTION collection manufactured with an HDF core composed of natural wood fibers; the FEELWOOD collection featuring MICRO-V beveled edges and a hardwood parquet appearance; the MEGAFLOOR collection available in seven different styles and with WOODVISION two- and four-sided beveling; and the SPIRIT collection made by directly printing the decoration onto the

330

"Russia is by far the largest market for flooring and carpets in Eastern Europe, accounting for 43 percent of all regional demand. In 2009, floor covering sales in the nation totaled 285 million square meters. After an extended period of decline in the years following the disintegration of the Soviet Union, building construction expenditures in Russia finally bottomed out in 1998 and began to climb again. Flooring and carpet demand in the country grew at a 4.4 percent annual rate from 2004 to 2009, matching the regional average."
--Section VII, pg. 236

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Other Studies

Geosynthetics

This study analyzes the US geosynthetics industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., geotextiles, geomembranes, geogrids, geonets, clay liners, preformed), market (e.g., construction, transportation infrastructure, landfills, liquid containment) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2744 ....April 2011 .... $4900

Precast Concrete Products

This study analyzes the US precast concrete products industry, excluding concrete pipe, brick and block. The study presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by precast concrete type (e.g., structural building components, architectural building components, transportation and marine, cemetery products, waste and waste handling, agricultural) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2746 .... March 2011................... $4800

Wood & Competitive Decking

US demand for decking is forecast to rise 2.7 percent annually through 2014, driven by an expected advance in housing completions from their low 2009 base. Wood decking will remain dominant but will be outpaced by wood-plastic composite, plastic and other decking types. This study analyzes the 3 billion lineal foot US wood and competitive decking industry. It presents historical demand data and forecasts for 2014 and 2019 by material type, market and US region. It also evaluates company market share and profiles industry competitors.

#2718 ....January 2011 .... $5100

World Housing

Global demand for new housing will rise 3 percent yearly through 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8 percent yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 .... September 2010................ $5300

World Roofing

Global roofing demand will grow 3.1 percent annually through 2014. China alone will claim over a third of all new demand, strengthening its position as the largest roofing market in square meter terms. Concrete tile will be the fastest growing type based on dominance in developing Asian nations. This study analyzes the 9.5 billion square meter world roofing industry, with forecasts for 2014 and 2019 by product, market, world region and for 56 countries. It also evaluates company market share and profiles industry participants.

#2656 .... July 2010.................... $6100

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