

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form & Corporate
Use License 7](#)

[About Freedonia,
Custom Research,
Related Studies, 8](#)



Wall Coverings

US Industry Study with Forecasts for **2015 & 2020**

Study #2759 | July 2011 | \$4800 | 275 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Demographic Trends	8
Consumer Spending Outlook.....	12
Consumer Financing Overview	15
Building Construction Overview	18
Residential.....	21
Housing Outlook	23
Housing Stock.....	28
Residential Improvements & Repairs	32
Nonresidential	33
Nonresidential Improvements & Repairs	36
Nonresidential Building Space Trends.....	37
Historical Market Trends	39
Pricing	43
Environmental & Regulatory Issues ...	45
Manufacturing Issues	46
Indoor Air Quality Issues	48
World Overview	51
Foreign Trade	54
Imports	55
Exports.....	57
Competitive Wall Coverings Outlook ..	58

PRODUCTS

General	62
Wall Panels	66
Products	68
Laminate Panels	70
Sheet Panels	72
Finished Gypsum Board.....	76
Solid Wood Panels	78
Other Wall Panels	80
Markets	82
Suppliers	85
Wallpaper	87
Products	91
Paper-Backed Vinyl.....	96
Fabric-Backed Vinyl	97

Vinyl-Coated Paper	98
Other Wallpaper	99
Markets	102
Suppliers	103
Decorative Tile	104
Products	106
Ceramic Tile.....	108
Glass Tile	110
Porcelain Tile.....	112
Other Decorative Tile	113
Markets	114
Suppliers	116

MARKETS

General	118
Residential Markets	121
New Housing	124
Residential Improvement & Repair	126
Demand by Housing Type.....	130
Single-Family.....	132
Multifamily.....	134
Manufactured Housing.....	136
Nonresidential Markets.....	138
New Building.....	142
Improvement & Repair	144
Demand by Building Type	147
Office & Commercial.....	148
Institutional.....	150
Industrial.....	153
Other Nonresidential	155

REGIONS

General	157
Regional Demographic & Economic Trends	159
Economic Outlook	159
Population Patterns	161
Construction Activity	163
Housing Trends	165
Regional Demand for Wall Coverings.	167
Northeast.....	170
New England.....	172
Middle Atlantic	173
Midwest.....	174
East North Central	176
West North Central.....	177

South	178
South Atlantic	181
East South Central	182
West South Central	183
West	184
Mountain	187
Pacific	188

INDUSTRY STRUCTURE

General	189
Industry Composition	192
Market Share	193
Acquisitions & Divestitures.....	195
Cooperative Agreements.....	196
Competitive Strategies.....	199
Manufacturing	202
Marketing	203
Distribution	204

COMPANY PROFILES

ACCRA Fine Wood Products	208
Armstrong World Industries	209
Blonder Company	211
Blue Mountain Wallcoverings	212
Brewster Home Fashions.....	213
Corporacion Empresarial Roca.....	215
Crane Company	217
Crossville Incorporated	219
Decorative Panels International.....	221
Fletcher Building	223
Foss Manufacturing	226
Illinois Tool Works.....	227
Jacaranda Incorporated.....	229
Josephson (J.) Incorporated.....	230
KI.....	231
Koch Industries	233
Len-Tex Corporation	236
Marazzi Group.....	238
Mohawk Industries	240
National Gypsum.....	243
OMNOVA Solutions.....	245
Owens Corning.....	248
Panariagroup Industrie Ceramiche	250
Patrick Industries.....	252
RJ Millwork Solutions	254

Table of Contents

(continued from previous page)

RJF International.....	255
Roysons Corporation.....	258
RPM International.....	259
Saint-Gobain.....	260
Schumacher (F.) & Company.....	263
Seabrook Wallcoverings.....	264
Sellers & Josephson.....	265
Steelcase Incorporated.....	266
US Vinyl Manufacturing.....	267
Vescom BV.....	269
Wallquest Incorporated.....	270
York Wallcoverings.....	271
Additional Companies Mentioned in the Study.....	273

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators.....	8
2 Population & Households.....	12
3 Personal Consumption Expenditures.....	15
4 Consumer Financing Environment, 2000-2010.....	18
5 Building Construction Expenditures.....	21
6 Residential Building Construction Expenditures.....	23
7 New Housing Indicators.....	28
8 Housing Stock by Type.....	31
Cht Year of Construction of Housing Stock, 2010.....	31
9 Residential Improvement & Repair Expenditures.....	33
10 Nonresidential Building Construction Expenditures.....	36
11 Nonresidential Building Improvement & Repair Expenditures.....	37

12 Nonresidential Building Floor Space.....	39
13 Wall Coverings Market, 2000-2010.....	42
Cht Wall Coverings Demand, 2000-2010.....	43
14 Wall Coverings Pricing Trends....	45
15 Wall Coverings Foreign Trade....	55
16 Wall Space Coverings Comparison	61

PRODUCTS

1 Wall Coverings Demand by Product.....	65
Cht Wall Coverings Demand by Product, 2010.....	66
2 Wall Panels Supply & Demand....	68
3 Wall Panels Demand by Product..	70
4 Laminate Wall Panels Demand...	72
5 Solid Wood Panels Demand.....	80
6 Other Wall Panels Demand.....	82
7 Wall Panels Demand by Market...	84
8 Wallpaper Supply & Demand.....	91
9 Wallpaper Demand by Product...	95
10 Wallpaper Demand by Market....	103
11 Decorative Tile Supply & Demand.....	106
12 Decorative Tile Demand by Product.....	108
13 Decorative Tile Demand by Market.....	116

MARKETS

1 Wall Coverings Demand by Market.....	120
Cht Wall Coverings Demand by Market, 2010.....	121
2 Residential Wall Coverings Demand.....	124
3 New Residential Wall Coverings Demand.....	126
4 Residential Improvement & Repair Wall Coverings Demand	130
5 Residential Wall Coverings Demand by Housing Type.....	132
6 Single-Family Wall Coverings Demand.....	134

7 Multifamily Wall Coverings Demand.....	136
8 Manufactured Housing Wall Coverings Demand.....	138
9 Nonresidential Wall Coverings Demand.....	141
10 New Nonresidential Wall Coverings Demand.....	144
11 Nonresidential Improvement & Repair Wall Coverings Demand	146
12 Nonresidential Wall Coverings Demand by Building Type.....	148
13 Office & Commercial Wall Coverings Demand.....	150
14 Institutional Wall Coverings Demand.....	152
15 Industrial Wall Coverings Demand.....	154
16 Other Nonresidential Wall Coverings Demand.....	156

REGIONS

1 Gross Domestic Product by Region.....	161
2 Population by Region.....	163
3 Construction Expenditures by Region.....	165
4 Regional Housing Indicators....	167
5 Wall Coverings Demand by Region.....	169
Cht Wall Coverings Demand by Region, 2010.....	170
6 Northeast Wall Coverings Demand.....	172
7 Midwest Wall Coverings Demand	176
8 South Wall Coverings Demand...	181
9 West Wall Coverings Demand....	187

INDUSTRY STRUCTURE

1 Wall Coverings Sales by Company, 2010.....	191
Cht Wall Coverings Market Share by Company, 2010.....	195
2 Selected Cooperative Agreements.....	198

Gains will be driven by a recovery in construction activity -- especially the residential sector -- and by a turn-around in wallpaper, which has suffered from negative consumer perceptions.

US demand to rise 8.2% annually through 2015

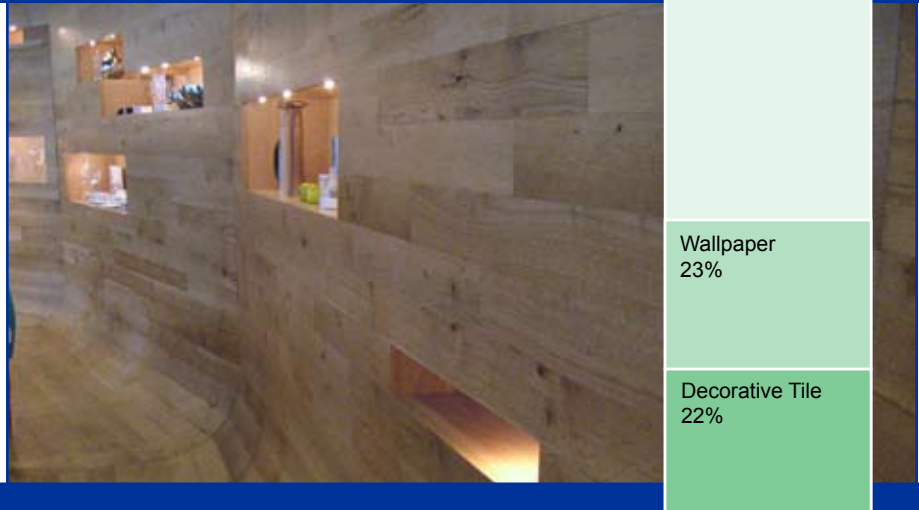
Demand for wall coverings is projected to advance 8.2 percent annually from a weak 2010 base to \$2.2 billion in 2015. Gains will be driven by a recovery in construction activity, especially in the residential sector. Demand for wall coverings will also benefit from the turn-around in the prospects for wallpaper, which has suffered from negative consumer perceptions and stiff competition from paint and coatings.

Dominant wall panels segment to also be fastest growing

Wall panel products will be the fastest growing wall coverings type through 2015. Sales of wall panel products will benefit from the expected recovery in residential construction activity, coupled with improving prospects in nonresidential construction markets. Laminate panels, in particular sheet panels, will continue to dominate demand, but greater growth prospects will emerge for several products at opposite ends of the value spectrum. For example, demand for low cost finished gypsum board panels will benefit from the long anticipated recovery in manufactured housing; while sales of higher-end solid wood panels will benefit from growth in new single family housing.

Wallpaper products is projected to be the second fastest growing wall coverings

US Wall Coverings Demand, 2010 (\$1.5 billion)



segment through 2015. Sales of wallpaper products have been in decline for more than a decade, reflecting changes in consumer preferences away from wallpaper in favor of paint and coatings. However, the development of products such as wallpaper borders, custom wallpaper and textured wallpaper is expected to breathe new life into a previously depressed product category. Also, advances in wallpaper technology, which make these products easier to apply and remove, will expand sales opportunities. In addition, the more positive prospects for building construction in both residential and nonresidential markets through 2015 will benefit demand for wallpaper.

Demand for decorative tile wall coverings is projected to increase at a slightly slower rate than wallpaper products through 2015. Gains will derive primarily from a recovery in new housing construction, although consumption will also benefit from accelerating new nonresidential construction. In addition, the recovery in construction markets will also lead to growth in improvement and repair spending in both residential and nonresidential markets, supporting increased demand for ceramic tile in bathroom and kitchen renovations. Higher-end products, such as glass tile, will provide outsized niche growth prospects.

Copyright 2011 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

PRODUCTS

Wallpaper

Demand for wallpaper from a weak 2010 base to a considerable improvement over 2010. Demand has dropped continuously. Actual decline for even longer, as the wallpaper, coupled with cheap benefit paint) have combined to reduce the use of wallpaper. Demand in wallpaper demand has trickled down to the retail level, where retailers such as Lowe's and Home Depot no longer sell wallpaper in their stores, although they do still offer it online. There have been several bankruptcies in this segment, including Blue Mountain Wallcoverings and Imperial Home Décor Group.

Growth opportunities through 2015 will be sparked by recovery in both residential and nonresidential building markets, and strengthening prospects in improvement and repair markets. In addition, some niche products, such as wallpaper borders and custom wallpaper products, continue to offer greater growth potential than conventional wallpaper. For conventional wallpaper products, the opportunity for a comeback will be supported by the strong expansion in new construction, with the greatest gains in residential markets.

Imports and exports of wallpaper are also significant. Imports of wallpaper have been steadily declining for years, reflecting the weakening market environment for wallpaper in the US, as paints have been by far the primary method of wall decoration. Recovery in construction markets and generally more favorable market conditions will increase in wallpaper imports through 2015, although imports will not return to the levels seen in the past. Exports are also forecasted primarily to emerging markets like China, where growth in the middle class is spurring demand for home décor products.

87

Copyright 2011

**SAMPLE
TEXT**

TABLE V-8

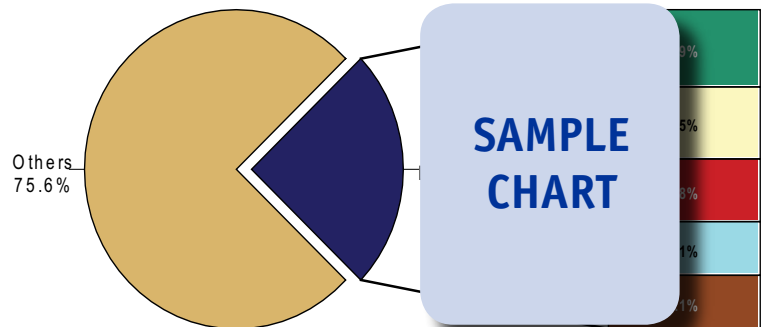
SOUTH WALL COVERINGS DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
South Construction Expenditures (bil \$)	1.5	1.5	1.5	1.5	1.5
\$ wall coverings/000\$ construction					
South Wall Coverings Demand	0	0	0	0	0
By Subregion:					
South Atlantic	0	0	0	0	0
East South Central	0	0	0	0	0
West South Central	0	0	0	0	0
By Application:					
Residential	0	0	0	0	0
Nonresidential	0	0	0	0	0
% South Wall Coverings Demand	6	6	6	6	6

**SAMPLE
TABLE**

CHART VI-1

WALL COVERINGS MARKET SHARE BY COMPANY
(\$1.4 billion, 2010)

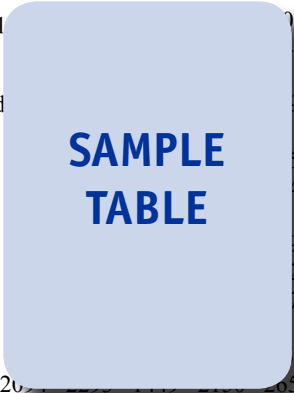


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-9
NONRESIDENTIAL WALL COVERINGS DEMAND
 (million dollars)

Item	2000	2005	2010	2015	2020
Nonresidential Bldg Floor Space (bil sq ft)	200	200	200	200	200
\$ wall covering/000 sq ft space	1.0	1.0	1.0	1.0	1.0
Nonresidential Wall Coverings Demand	200	200	200	200	200
By Market Segment:					
New Building					
Improvement & Repair					
By Product:					
Wall Paneling					
Wallpaper					
Decorative Tile					
% nonresidential Wall Coverings Demand	20	20	20	20	20



COMPANY PROFILES

Foss Manufacturing Company LLC
 11 Merrill Industrial Drive
 Hampton, NH 03842
 603-929-6000
 http://www.foss.com

Annual Sales: \$100 million
 Employment: 1000

Key Products: Engineered nonwovens, technical fabrics, specialty fibers

Foss Manufacturing Company LLC is a manufacturer of engineered nonwovens and technical fabrics. The Company is owned by private equity. Foss Manufacturing Company LLC (Fort Lauderdale, Florida). Foss Manufacturing operates in seven business units: Automotive, KUNIN Group, ECO-FI, FOSSHIELD, OZITE, Specialty Fibers and Technical Fabrics.

The Company competes in the US wall coverings industry via the OZITE business unit (Hampton, New Hampshire), which produces and markets a range of engineered fabric products. OZITE's wall covering products include decorative textiles for commercial and industrial applications. These products are manufactured via the Hytex Industries Incorporated subsidiary (Randolph, Massachusetts). Foss has production operations at its headquarters facility in Randolph, Massachusetts.

Hytex's decorative textiles are produced using FOSSFIBRE solution-dyed polyester and polypropylene fibers, and TEFLON (DuPont) fabric protection systems. Textiles manufactured by Hytex are available in styles that provide enhanced acoustical properties and fade resistance. Among these products are BEDFORD 3 commercial wall coverings, which are produced in 41 colors. These wall coverings are

226 Copyright 2011 The Freedonia Group, Inc.



"Demand for wallpaper in nonresidential markets is projected to expand 5.8 percent annually to \$250 million in 2015. Wallpaper is the second most widely used wall covering product in nonresidential markets, after wall paneling. Demand for wallpaper in nonresidential buildings will benefit from the improving resistance to mold formation exhibited by the latest generations of wallpaper, coupled with its other favorable performance characteristics, such as stain resistance and high durability. In addition ..."

--Section IV, pg. 140

OTHER STUDIES

Countertops

This study analyzes the US countertop industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by material (e.g., laminates, solid surface materials, natural stone, engineered stone, cast polymers, tile) and market (e.g., kitchen, bathroom). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2788 August 2011 \$5100

Hard Surface Flooring

This study analyzes the US hard surface flooring industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., vinyl, rubber, linoleum, ceramic tile, wood, laminate) and market (e.g., residential buildings, nonresidential buildings, transportation equipment). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players

#2789 July 2011 \$4900

World Flooring & Carpets

World demand for flooring and carpets is forecast to grow five percent annually through 2014. North America will register the fastest sales gains based on a strong rebound in residential construction and motor vehicle output. Nonresilient flooring (e.g., ceramic, laminate, wood) will outpace both resilient flooring and textile floor coverings. This study analyzes the 12 billion square meter world flooring and carpet industry, with forecasts for 2014 and 2019 by product, market, world region and for 38 countries. It also evaluates company market share and profiles industry players.

#2731 March 2011 \$6100

World Drywall & Building Plasters

Global drywall demand will advance 8.4 percent annually through 2014. Over four-fifths of new demand will be attributable to the US and the Asia/Pacific region. The residential market will outpace nonresidential demand. Global building plaster demand will advance 5.3 percent annually through 2014. This study analyzes the world drywall and building plaster industry, with forecasts by product, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2643 June 2010 \$5800

Decorative Tile

US demand for decorative tile is forecast to increase 4.4 percent per year through 2013. Flooring will remain the dominant application. The residential construction market will generate the most rapid gains in tile demand, as housing completions rebound and consumer spending on improvement and repair projects increases. This study analyzes the 2.7 billion square foot US decorative tile industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates company market share and profiles industry players.

#2580 December 2009 \$4800

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)