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# Hard Surface Flooring

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

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Study #2789 | July 2011 | \$4900 | 298 pages

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**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](mailto:info@freedoniagroup.com)

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*Advances will be driven by a recovery in improvement and repair expenditures, a rebound in new building construction, and increased use of hard surface flooring instead of carpeting.*

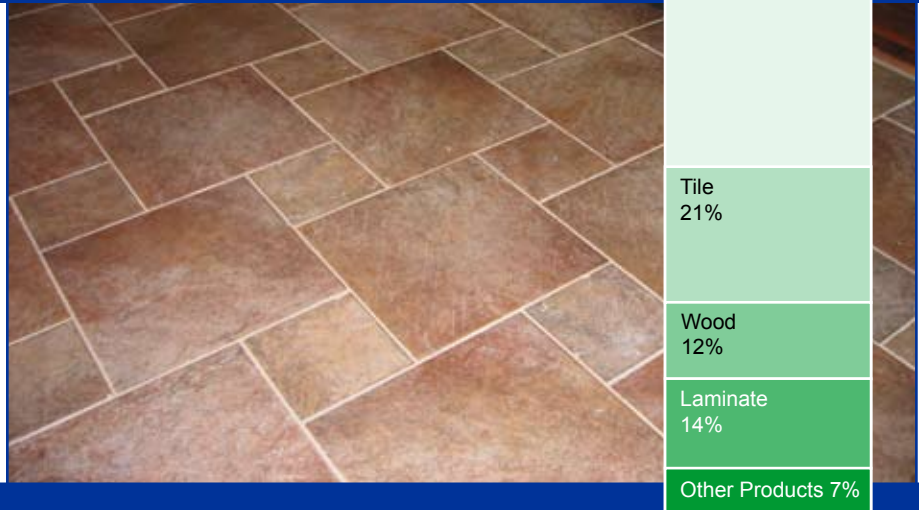
## US demand to rise 7.2% annually through 2015

US demand for hard surface flooring is forecast to rise 7.2 percent per year to 9.2 billion square feet in 2015, valued at \$11.0 billion. This pace represents a dramatic turnaround from the 2005-2010 period. Advances will be driven by a recovery in improvement and repair expenditures and a rebound in new building construction from a depressed 2010 base. Also contributing to gains will be increased use of hard surface flooring instead of carpeting.

## Nonresidential buildings to be fastest growing market

The nonresidential market is forecast to account for the most rapid advances in hard surface flooring demand through 2015. Growth will be driven by the expected rebound in spending on construction of office and commercial buildings and institutional buildings, the two largest markets for hard surface flooring. Rising improvement and repair spending from its low 2010 base will also support hard surface flooring demand in these markets. In addition, suppliers will continue to benefit from a consumer preference for hard surface flooring. Building owners and managers select hard surface flooring rather than carpeting because of its durability and minimal maintenance requirements. In the residential market, demand will be spurred by rising housing completions

## US Hard Surface Flooring Demand (6.5 billion square feet, 2010)



and improvement and repair spending. Many homeowners also opt for hard surface flooring because it is seen as being more durable and aesthetically pleasing than carpet. Rebounding motor vehicle and rising recreational boat and vehicle, aircraft and train shipments will support demand in the transportation market.

## Tile and laminate flooring to be fastest growing products

Tile and laminate flooring are projected to see the most rapid demand gains through 2015. Tile flooring demand will be supported by its favorable performance properties, such as durability and

slip resistance. Laminate growth will be spurred by the rebound in residential building construction, the market where laminate flooring is most often used. Advances will also be supported by the efforts of manufacturers to create products with more realistic finishes and textures. Vinyl flooring will continue to account for the majority of hard surface flooring demand because of its low cost, durability and minimal maintenance requirements. However, vinyl flooring will see below-average growth through 2015 due to competition from other hard surface flooring materials, such as laminates and tile, that are seen as more attractive.

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## Sample Text, Table & Chart

### PRODUCTS

#### Resilient Flooring

Resilient flooring demand is projected to increase annually to 2.3 billion square feet by 2020. Vinyl is dominant in nonresidential markets, while carpet is dominant in residential markets. As the economy recovers and repair expenditures rise, efforts by manufacturers with enhanced visuals and surface textures will boost demand in both markets.

**SAMPLE TEXT**

Resilient flooring offers consumers a low-cost product that features performance characteristics such as high underfoot comfort, noise absorption, durability and wear resistance. Most resilient flooring can be easily cleaned using readily available cleaning products. Moreover, this type of flooring can be used in almost all applications.

However, more rapid growth in resilient flooring demand will be checked by heavy competition from other flooring products. Carpet is generally less costly than resilient flooring, which negatively affects demand among budget-conscious consumers. Other consumers, particularly those in high-end markets, find other hard surface flooring varieties, such as hardwood and tile, to be more aesthetically pleasing.

The resilient flooring segment primarily consists of vinyl products. However, other resilient floor coverings -- including rubber, cork and asphalt -- maintain positions in the market because characteristics such as design flexibility, long life and environmental friendliness. Resilient flooring can be installed in almost any environment. However, market applications for other nonresilient flooring tends to be limited. For example, demand for rubber flooring

TABLE III-3

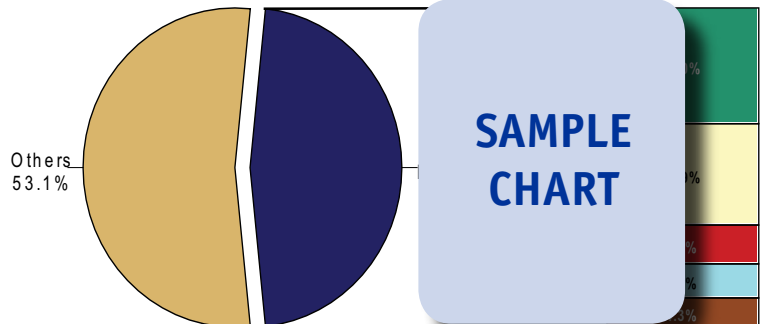
VINYL FLOORING SUPPLY & DEMAND  
(million square feet)

Item	2000	2005	2010	2015	2020
Resilient Flooring Demand	2,000	2,200	2,300	2,400	2,500
% vinyl	95	95	95	95	95
Vinyl Flooring Demand	1,900	2,100	2,200	2,300	2,400
Vinyl Sheet	1,800	2,000	2,100	2,200	2,300
Vinyl Composition Tile	100	100	100	100	100
Other Vinyl Tile	0	0	0	0	0
- net imports	50	50	50	50	50
Vinyl Flooring Shipments	1,850	2,050	2,150	2,250	2,350
\$/sq ft	6.0	6.0	6.0	6.0	6.0
Vinyl Flooring Demand (mil \$)	11,400	12,600	13,200	13,800	14,400

**SAMPLE TABLE**

CHART V-1

HARD SURFACE FLOORING SALES BY COMPANY  
(\$7.0 billion, 2010)

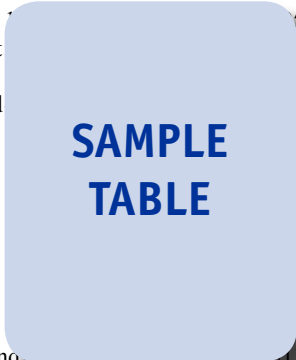


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-3**  
**NEW RESIDENTIAL BUILDING  
 HARD SURFACE FLOORING DEMAND**  
 (million square feet)

Item	2000	2005	2010	2015	2020
New Housing Units (000 units)					50
000 sq ft floor covering/housing unit					1.5
New Resident Floor Covering Demand					30
% hard surface flooring					10
New Resident Hard Surface Demand					20
Single-Family Units					10
Multifamily Units					50
Manufactured Housing					50
% new					8
Resident Hard Surface Flooring Demand					110



**COMPANY PROFILES**

**Crossville Incorporated**  
 346 Sweeney Drive  
 Crossville, TN 38555  
 931-484-2110  
 http://www.cros

Annual Sales: \$1.2 billion  
 Employment: 4,000

Key Products: Ceramic Tiles, Porcelain Tiles, Natural Stone Tiles, Glass Tiles, Metal Tiles

Crossville Incorporated Group Incorporated (Crystal Lake, Illinois), is a privately held manufacturer of porcelain, natural stone, glass and metal tiles for residential and commercial wall and floor applications. The Company sells its products through a network of independent dealers and distributors in North America.

The Company participates in the US hard surface flooring industry through the manufacture and sale of porcelain, natural stone and metal tiles for residential and commercial applications. Porcelain tiles from Crossville are marketed through the DESIGN SOLUTIONS and PORCELAIN STONE collections. Manufacturing operations for the Company include a plant in Crossville, Tennessee.

Within Crossville's DESIGN SOLUTIONS range is the SAVOY product line, which features tiles made with subtle color and texture variations to appear handmade. These tiles have matte or glossy finishes, and are suitable for use on light-duty horizontal surfaces in residential bathrooms and other settings, among other applications.

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"Demand for hard surface flooring in the new residential market is projected to increase over 15 percent annually to 1.0 billion square feet in 2015. This is a turnaround from the 2005-2010 period, when demand fell nearly 17 percent per year as housing completions fell precipitously during the 2007-2009 recession. As housing completions rebound from their low 2010 base, hard surface flooring demand will also post gains."

--Section IV, pg. 136

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**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

**Green Building Materials**

US demand for green building materials is projected to expand 13 percent annually through 2015. The largest value gains will be from concrete products featuring recycled content (e.g., fly ash, blast furnace slag), which will surpass floor coverings to become the largest green building material segment by 2015. This study analyzes the \$38.7 billion US green building material industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry participants.  
 #2733..... April 2011..... \$4900

**Precast Concrete Products**

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.  
 #2746..... March 2011..... \$4800

**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

**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

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