World Flooring & Carpets

Industry Study with Forecasts for **2016 & 2021**

Study #2981 | January 2013 | $6300 | 412 pages

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Industry Study with Forecasts for *2016 & 2021*

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MARKET ENVIRONMENT

WORLD SUPPLY & DEMAND

NORTH AMERICA

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OTHER REGIONS

INDUSTRY STRUCTURE

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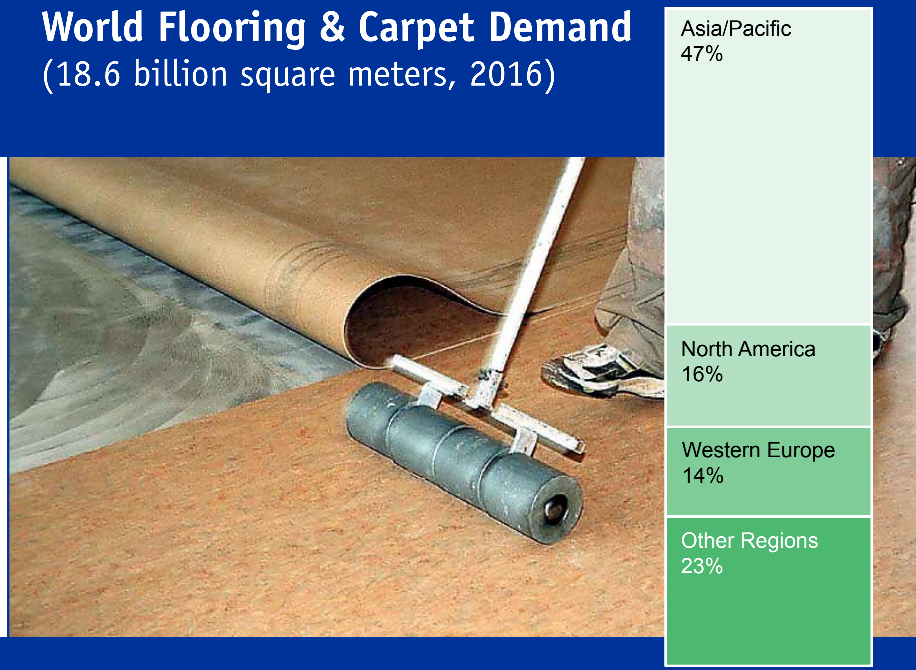
Rebounds in residential construction will drive gains in developed areas, while rising building construction activity and growing per capita incomes will spur demand in developing regions.

World demand to rise 4.9% annually through 2016

World demand for flooring and carpets is expected to rise 4.9 percent annually to 18.6 billion square meters in 2016. This will be an improvement from the rate during the 2006-2011 period, as countries rebound from the 2008 global economic crisis. In value terms, demand for floor coverings is projected to advance 6.8 percent per year to $270 billion. The primary driver of demand in developed areas will be rebounds in the residential construction markets of many countries (especially in the US). In developing regions, rising building construction activity and growing per capita incomes will spur demand and allow households to afford more expensive floor coverings. Rising motor vehicle production in many areas will also boost overall demand for floor coverings.



World Flooring & Carpet Demand
(18.6 billion square meters, 2016)

Asia/Pacific region to see fastest market gains

The Asia/Pacific region is forecast to see the fastest gains in floor covering demand, as the rapid industrialization of many countries in this region and rising personal incomes will drive demand. China alone is projected to account for over one-third of all new demand generated through 2016, strengthening its position as the largest market for flooring and carpets in the world. North America is expected to see the second fastest gains in flooring and carpet demand, driven by an expected rebound in the US housing market. Solid increases in motor vehicle production in the US will also boost demand for floor coverings. Gains in developed areas such as Western Europe, Australia, and Japan will not be as strong as those in North America or developing regions. However, a rebound in new housing construction will boost demand in many of these countries.

Nonresilient flooring to see strongest growth

In 2011, ceramic tile accounted for almost one-half of demand in the Asia/Pacific region and in Central and South America, while carpets and rugs predominated in North America. Resilient flooring had its greatest penetration in Eastern Europe, where it represented just over one-third of demand. In no other region did its penetration exceed one-eighth. Overall, nonresilient flooring accounted for about three-fifths of global floor covering demand in 2011, and these products are forecast to see the strongest gains through 2016. Manufacturers of nonresilient flooring will benefit from rapid gains in demand in Asia, where these products account for most floor covering sales. For example, nonresilient flooring represented 88 percent of demand in China in 2011, with ceramic tile accounting for the majority. Demand for carpets and rugs will enjoy its fastest growth in North America, based on gains in US home building.

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Sample Text, Table & Chart

MARKETS

China: Flooring & Carpet Outlook & Suppliers

Through 2016, floor covering demand in China is foreca
advance … billion square meters, a d
tion fror … -2011 period but still the
rate in th … both residential and non
construc … s in motor vehicle produ
spur der … nes will also allow consu
chase hi … t were previously unaffo
reversal o … flooring is expected to se
demand gains through 2016, though it will continue to accou
a small portion of demand. Nonresilient flooring will also po
growth, led by laminate flooring, which is projected to post d
annual growth. Ceramic tile will retain the greatest market s
resilient flooring demand, however. Demand gains for carpe
will lag those in the other segments.

SAMPLE TEXT

Production of floor coverings by facilities in China is fo
expand 7.6 percent per annum to 5.7 billion square meters in
among the fastest rates of increase in the world. Local producers will benefit from increased domestic demand, leading to further expansion in industry capacity. Additionally, greater foreign investment in plants in China will boost production. For example, Shaw Industries (Berkshire Hathaway) is constructing a new carpet tile factory in Shanghai that is expected to start production in 2013. Greater efforts to improve Chinese products' quality and performance will make the products more competitive globally, boosting exports and resulting in a widening of
trade surplus.

While foreign investment continues to rise, the flooring
industry in China is dominated by locally headquartered com
most of which are small enterprises. China-based floor cover
facturers include A & W Shanghai Woods, China Ceramics,

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TABLE VI-4

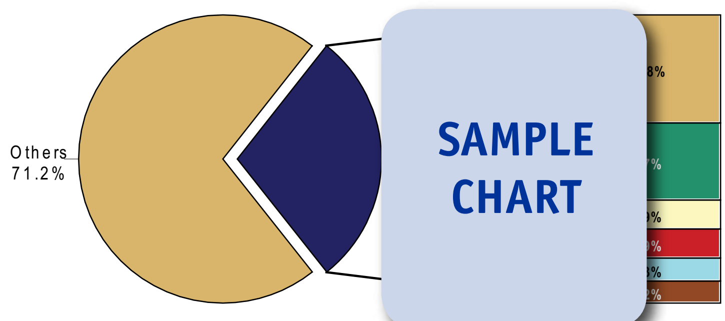
CHINA: FLOORING & CARPET DEMAND BY PRODUCT & MARKET

Item	2001	2006	2011	2016	2021
Asia/Pacific Flooring/Carpet Demand					
% China					
Flooring & Carpet Demand					
By Product:					
Nonresilient Flooring					
Ceramic					
Laminate					
Wood					
Other					
Resilient Flooring					
Vinyl					
Other					
Carpets & Rugs					
Tufted					
Other					
By Market:					
Residential Buildings					
Nonresidential Buildings					
Transportation Equipment & Other					

SAMPLE TABLE

CHART VIII-4

WORLD CARPET & RUG MARKET SHARE BY COMPANY ($35 billion, 2011)



SAMPLE CHART

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Industry Study with Forecasts for ***2016 & 2021***

Sample Profile, Table & Forecast

TABLE VI-3

CHINA: FLOORING & CARPET SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
per capita GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Population (millions)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Building Construction Expend (bil 201	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonresidential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Housing Stock (mil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Motor Vehicle Production (000 units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
m² flooring/mil $ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
m² flooring/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
m² flooring/000$ building constr	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Flooring & Carpet Demand (mil m²)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Flooring & Carpet Production (mil m²)	[illegible]	[illegible]	[illegible]	[illegible]	7450

SAMPLE TABLE

COMPANY PROFILES

Ceramica Cleopatra Group
36 Al Batal Ahmed Abd El Aziz Street
Mohandeseen
Egypt
20-2-3761-40
http://www.cl

Annual Sales:
Employment:

Key Products

SAMPLE PROFILE

Ceramica Cleopatra Group is a producer of ceramic and porcelain tile, sanitaryware, and bathtubs. The Company is a privately held enterprise.

The Company participates in the world flooring and carpets industry through the manufacture of ceramic and porcelain floor tiles, which are engineered to be hardwearing, durable, stain and grease resistant, colorfast, fireproof, and easy to clean. These tiles, which are produced in a range of sizes and styles, include such ceramic tile collections as TRIVERO, STONEWOOD, RAIN FOREST, SHERWOOD, SIDAR, ALABASTRO, BUCKINGHAM, TAOS, FOREST, TUSCANA, PALACIO, TAIGA, TALK, SANDSTONE, CASTELLI, ANNA, DALLAS, HIDRAULIC, TINNED, SASSO, SAVANA, OCEANO, CORONA, STREET, SKY, SLATE, BRICKSTONE, and CRISTAL. Ceramic Cleopatra Group's porcelain floor tiles include HAPPY, MAY, FAN, MULTIFORMAT, CRYSTAL, ASWAN, and FUNNY offerings.

Production activities are carried out by Ceramica Cleopatra Group at four ceramic and porcelain tile plants in Egypt that operate as

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"China was the largest producer of flooring and carpets in the world in 2011, with a total industry output of 3.9 billion square meters that accounted for over one-quarter of the global total. All types of flooring are manufactured in China, with more of an emphasis on ceramic tile, stone flooring, and handwoven rugs. China was also the largest net exporter of floor coverings in the world in 2011, with a trade surplus equivalent to ..."
--Section VI, pg. 165

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Other Studies

World Housing

World construction of new housing units will rise 3.3 percent per annum to 60.9 million units in 2017. Over 80 percent of global new housing construction will take place in the Asia/Pacific and Africa/Mideast regions, while North America and Western Europe will have the highest rates of growth. This study analyzes the two billion unit world housing industry, with forecasts for 2017 and 2022 by housing type, world region, and for 22 countries. The study also considers market environment factors such as world economic trends, demographics, and housing construction.

#3087 .... October 2013 .... $5700

Decorative Tile

US demand for decorative tile is forecast to rise 6.7 percent per year through 2017, reaching 3.2 billion square feet. Natural stone will overtake porcelain as the second largest tile type in area demand terms, while ceramic tiles remain dominant. Floors will remain the largest application and will grow the fastest, followed closely by walls. This study analyzes the 2.3 billion square foot US decorative tile industry, with forecasts for 2017 and 2022 by material type, application, and market. The study also evaluates company market share and profiles industry players.

#3014 .... April 2013 .... $4900

Prefabricated Housing

US demand for prefabricated housing is forecast to expand 15 percent annually through 2017 to 135,000 units. Manufactured housing will remain the most common type, while other prefabricated housing such as modular, precut and panelized housing will grow the fastest. The South will remain the leading US regional market. This study analyzes the 67,000 unit US prefabricated housing industry, with forecasts for 2017 and 2022 by product and US region. The study also evaluates company market share and profiles industry competitors in the US market.

#3001 .... February 2013 .... $4900

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to $86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the $51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 .... February 2013 .... $5100

Wood & Competitive Decking

US demand for decking is forecast to rise 2.4 percent annually through 2016 to 3.3 billion lineal feet, valued at $5.7 billion. Wood-plastic composite and plastic lumber decking materials will grow at double-digit rates, far outpacing the dominant wood segment. The residential building market will lead gains. This study analyzes the 2.9 billion lineal foot US wood and competitive decking industry, with forecasts for 2016 and 2021 by material type, market, application and US region. The study also evaluates company market share and profiles industry competitors.

#2959 .... October 2012 .... $5300

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