

[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](#)



Hard Surface Flooring

US Industry Study with Forecasts for **2017 & 2022**

Study #3037 | June 2013 | \$5100 | 311 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.....	5
Demographic Trends	8
Consumer Trends	13
Personal Income & Expenditures.....	13
Consumer Financing	16
Building Construction	19
Residential Buildings.....	21
Housing Completions.....	24
Housing Stock	29
Improvements & Repairs	33
Nonresidential Buildings	34
New	35
Improvements & Repairs	37
Transportation Equipment Outlook.....	39
Motor Vehicles.....	43
Other Transportation Equipment.....	46
Pricing	48
Historical Market Trends.....	50
Environmental & Regulatory Issues	53
Recycling.....	53
Materials Renewability & Sustainability	56
Indoor Air Quality	58
Green Building Practices	61
Lacey Act	62
World Hard Surface Flooring Outlook	63
Foreign Trade	66
Imports.....	68
Exports	70
Competitive Floor Coverings Outlook.....	71

PRODUCTS

General	74
Supply & Demand.....	75
Resilient Flooring.....	80
Vinyl Flooring.....	82
Vinyl Sheet	84
Luxury Vinyl Tile	87
Vinyl Composition & Other Tile.....	89
Market Share	92

Other Resilient Flooring	93
Rubber	95
Linoleum	96
Cork.....	97
Asphalt & Other.....	99
Nonresilient Flooring	99
Tile Flooring.....	103
Products.....	106
Product Development.....	108
Market Share	109
Laminate Flooring	110
Products.....	112
Product Development.....	114
Market Share	116
Wood Flooring	118
Solid Wood Flooring	121
Engineered Wood Flooring	124
Market Share	127
Other Nonresilient Flooring.....	128
Seamless Flooring	129
All Other	130

MARKETS

General	134
Residential Buildings.....	137
New Construction	140
Replacement & Remodeling	142
Demand by Residence Type	144
Single-Family	146
Multifamily	150
Manufactured Housing	153
Nonresidential Buildings	156
New Construction	158
Replacement & Remodeling	160
Demand by Building Type	162
Office & Commercial	163
Institutional	169
Industrial	172
Other Nonresidential Buildings.....	174
Transportation Equipment.....	176
Motor Vehicles.....	178
Other Transportation Equipment	180

INDUSTRY STRUCTURE

General	183
Industry Composition	184

Market Share	187
Competitive Strategies.....	192
Product Development.....	194
Vinyl Flooring.....	194
Laminate Flooring	196
Wood Flooring	199
Tile Flooring.....	200
Manufacturing	201
Marketing	202
Distribution	204
Mergers & Acquisitions.....	207
Cooperative Agreements.....	209

COMPANY PROFILES

Armstrong World Industries	213
Beaulieu International.....	219
Berkshire Hathaway.....	222
Bilrite Corporation	226
Clarion Industries.....	228
Congoleum Corporation	229
Connor Sport Court International.....	232
Crossville Incorporated	236
DuPont (EI) de Nemours.....	238
Ecore International	240
Financiera Maderera.....	243
Florim Ceramiche	246
Forbo Holding	248
Internacional de Ceramica	251
IVC Group	253
Kaindl Flooring	255
Krono Holding	257
Lear Corporation	259
Mannington Mills	260
Mohawk Industries	268
Mullican Flooring	278
nora systems	280
Panariagroup Industrie Ceramiche.....	282
Porcelanosa Grupo.....	285
Roppe Holding.....	288
RPM International.....	292
Superior Manufacturing	296
Tarkett SA.....	299
TOLI Corporation.....	306
VPI Corporation	308
Witex Flooring Products	310

List of Tables

EXECUTIVE SUMMARY

1 Summary Table3

MARKET ENVIRONMENT

1 Macroeconomic Indicators8
 2 Population & Households 12
 3 Personal Consumption Expenditures .. 16
 4 Consumer Financing Environment,
 2002-2012..... 19
 5 Building Construction Expenditures... 21
 6 Residential Building Construction
 Expenditures 24
 7 New Housing Indicators 29
 8 Housing Stock by Type..... 32
 9 Residential Improvement
 & Repair Expenditures 34
 10 Nonresidential Building
 Construction Expenditures 37
 11 Nonresidential Building Improvement
 & Repair Expenditures 39
 12 Transportation Equipment
 Shipments 42
 13 Motor Vehicle Indicators 46
 14 Other Transportation
 Equipment Indicators 48
 15 Hard Surface Flooring Pricing 50
 16 Hard Surface Flooring
 Demand, 2002-2012 52
 17 Hard Surface Flooring Foreign Trade .. 67
 18 Floor Coverings Demand 73

PRODUCTS

1 Hard Surface Flooring
 Supply & Demand..... 78
 2 Resilient Flooring Supply & Demand.. 81
 3 Vinyl Flooring Supply & Demand 84
 4 Vinyl Sheet Flooring Demand 86
 5 Luxury Vinyl Tile Flooring Demand 89
 6 Vinyl Composition & Other Vinyl
 Tile Flooring Demand..... 92
 7 Other Resilient Flooring
 Supply & Demand..... 95
 8 Nonresilient Flooring
 Supply & Demand..... 102
 9 Tile Flooring Supply & Demand..... 105

10 Laminate Flooring
 Supply & Demand..... 112
 11 Wood Flooring Supply & Demand 121
 12 Solid Wood Flooring Demand..... 124
 13 Engineered Wood Flooring Demand . 127
 14 Other Nonresilient Flooring
 Supply & Demand..... 129

MARKETS

1 Hard Surface Flooring
 Demand by Market 136
 2 Residential Hard Surface
 Flooring Demand..... 140
 3 New Residential Hard Surface
 Flooring Demand..... 142
 4 Residential Replacement &
 Remodeling Demand for
 Hard Surface Flooring 144
 5 Residential Floor Coverings
 Demand by Housing Type 145
 6 Single-Family Housing Hard
 Surface Flooring Demand
 by Product & Application 150
 7 Multifamily Housing Hard
 Surface Flooring Demand
 by Product & Application 153
 8 Manufactured Housing Hard
 Surface Flooring Demand
 by Product & Application 155
 9 Nonresidential Hard Surface
 Flooring Demand..... 158
 10 New Nonresidential Hard Surface
 Flooring Demand..... 160
 11 Nonresidential Replacement &
 Remodeling Hard Surface
 Flooring Demand..... 162
 12 Nonresidential Hard Surface Flooring
 Demand by Building Type 163
 13 Office & Commercial Hard Surface
 Flooring Demand..... 168
 14 Institutional Hard Surface
 Flooring Demand..... 172
 15 Industrial Hard Surface
 Flooring Demand..... 174
 16 Other Nonresidential Hard Surface
 Flooring Demand..... 176
 17 Transportation Equipment Hard
 Surface Flooring Demand..... 178

18 Motor Vehicle Hard Surface
 Flooring Demand
 by Application & Product 180
 19 Other Transportation Equipment
 Hard Surface Flooring
 Demand by Product 182

INDUSTRY STRUCTURE

1 US Hard Surface Flooring Sales
 by Company, 2012..... 186
 2 Selected Acquisitions
 & Divestitures 208
 3 Selected Cooperative Agreements ... 210

List of Charts

MARKET ENVIRONMENT

1 Year of Construction of
 Housing Stock, 2012 32
 2 Hard Surface Flooring
 Market, 2002-2012..... 53
 3 World Hard Surface Flooring
 Demand, 2012 66

PRODUCTS

1 Hard Surface Flooring Demand, 2012. 79
 2 Vinyl Flooring Market Share, 2012..... 93
 3 Nonresilient Flooring Demand
 by Type, 2012 103
 4 Tile Flooring Market Share, 2012 110
 5 Laminate Flooring
 Market Share, 2012 118
 6 Wood Flooring Market Share, 2012.. 128

MARKETS

1 Hard Surface Flooring Demand
 by Market, 2012 137
 2 Residential Hard Surface Flooring
 Demand by Housing Type, 2012... 146

INDUSTRY STRUCTURE

1 US Hard Surface Flooring Sales
 by Company, 2012..... 187

[Click here to purchase online](#)

Advances will be driven by sharp increases in housing completions and by increasing construction of structures such as retail sites, restaurants, office buildings, and education and health care facilities.

US demand to rise 5% annually through 2017

US demand for hard surface flooring is forecast to rise 5.0 percent per year to 9.3 billion square feet in 2017, valued at \$13.8 billion. Advances will be driven by rebounding building construction expenditures. Sharp increases in housing completions will spur gains in the residential market, while nonresidential demand will be boosted by increasing construction of structures such as retail sites, restaurants, office buildings, and education and health care facilities, many of which feature intensive use of hard surface flooring.

Demand will also be spurred by strong consumer interest in alternatives to traditional carpeting. While often more costly initially, hard surface flooring offers performance advantages, such as a longer lifespan and less maintenance. In terms of aesthetics, many consumers find flooring such as hardwood, luxury vinyl tile, and porcelain and stone tiles more attractive than carpet.

Residential market to outpace nonresidential

The residential market is forecast to see the fastest gains in hard surface flooring demand through 2017, fueled by a rebound in housing completions. Style trends that call for homes to have larger kitchens and more and larger bathrooms will promote hard surface flooring use, particularly moisture-resistant vinyl and



tile flooring. The residential remodeling and replacement segment will continue to account for the larger share of demand as homeowners replace older or worn carpeting with hard surface flooring, such as wood or laminates, to create more aesthetically pleasing interiors.

In the nonresidential market, the office and commercial segment will post the strongest growth, fueled by double-digit annual advances in construction spending and rising interest in hard surface flooring as a low-maintenance alternative to carpeting. Vinyl and tile flooring will account for the largest shares of nonresidential hard surface flooring demand due to such performance properties as resistance to slips and biological con-

tamination. These qualities are viewed as especially desirable in institutional structures.

Vinyl flooring to be fastest growing type

Among all hard surface flooring types, vinyl flooring is expected to see the strongest gains through 2017. Demand will be spurred by rising use of luxury vinyl tile. Consumers increasingly opt for this material because it offers the durability and performance properties of traditional vinyl flooring, but features a high-gloss appearance and can resemble more costly wood or stone. Tile demand will also rise at an above average pace, boosted by consumer desire for durable, low-maintenance flooring with favorable aesthetics.

Study Coverage

This industry study, **Hard Surface Flooring**, presents historical demand data for 2002, 2007 and 2012, as well as forecasts for 2017 and 2022 by hard surface flooring material (e.g., vinyl, tile, laminate, wood) and market (residential buildings, nonresidential buildings, transportation equipment). The study also considers key market environment factors, assesses the industry structure, evaluates company market share, and profiles 31 industry competitors such as Armstrong World Industries, Mannington Mills, Mohawk Industries, Tarkett, and Shaw Industries.

Copyright 2013 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

PRODUCTS

Resilient Flooring

Resilient flooring demand is expected to increase by year to 8 billion dollars. Vinyl sheet flooring is the dominant product, accounting for 56.6% of the market in 2012, a forward-looking estimate. Other products include luxury vinyl tile, vinyl composition tile, and rubber flooring. Homeowners and business owners looking to upgrade their properties may select luxury vinyl tile (LVT) because of its aesthetic appeal and ease of installation, while other consumers can opt for low cost vinyl sheet flooring or vinyl composition tile.

Demand for resilient flooring will also be boosted by the efforts of vinyl flooring manufacturers to offer products with enhanced aesthetic and performance properties. LVT, which has seen rising use in residences and commercial structures because of its gloss and resemblance to such materials as wood or stone, will see gains as manufacturers offer products with more detailed and textured surfaces. Increasing use of fiberglass-backed products may also promote demand, as these materials feature more wear resistance.

The resilient flooring segment primarily consists of vinyl products. However, such resilient flooring types as rubber, linoleum, cork, and asphalt maintain positions in the market because of their desirable characteristics, including design flexibility, durability, and being a "green" material. Resilient flooring can be installed in any environment, but market applications for these products are limited. For instance, rubber flooring demand is heavily concentrated in harsh environment applications, such as industrial facilities, kitchens, and warehouses. Linoleum and cork, while seeing use because of consumer interest in sustainable building products.

80

Copyright 2013

TABLE III-8

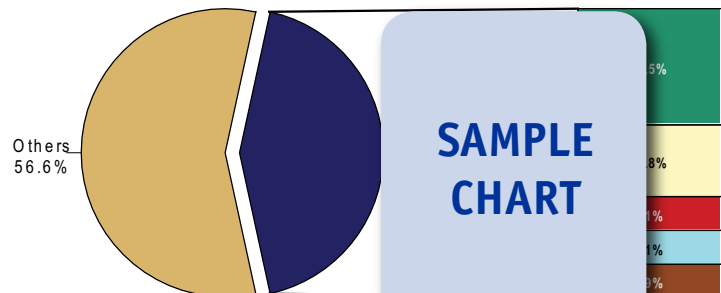
NONRESILIENT FLOORING SUPPLY & DEMAND
(million square feet)

Item	2002	2007	2012	2017	2022
Resilient Flooring Demand					
% vinyl					
Vinyl Flooring Demand					
Vinyl Sheet					
Luxury Vinyl Tile					
Vinyl Composition & Other Tile					
- net imports					
Vinyl Flooring Shipments					
\$/sq ft					
Vinyl Flooring Demand (mil \$)					

SAMPLE
TABLE

CHART V-1

US HARD SURFACE FLOORING SALES BY COMPANY
(\$9.7 billion, 2012)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-10

**NEW NONRESIDENTIAL HARD SURFACE FLOORING DEMAND
(million square feet)**

Item	2002	2007	2012	2017	2022
Nonres Bldg Construction (bil 2005\$) sq ft floor coverings/000\$ construction					
New Nonres Floor Coverings Demand % hard surface flooring					
New Nonres Hard Surface Demand					
Office & Commercial					
Institutional					
Industrial					
Other					
% new					
Nonres Hard Surface Flooring Demand3					



COMPANY PROFILES

Mullican Flooring LP
 655 Woodlyn Road
 Johnson City, TN 37601
 423-922-1605



...ed by company, 4/13)
 ...company, 4/13)
 ...ed hardwood flooring
 ...res and sells hardwood flooring,
 ...solid and engineered hardwood floor-
 ing products. The majority of these products are made from timber
 grown in the Appalachian Mountains region of the US. The company
 is privately held.

The Company is active in the US hard surface flooring industry through the manufacture and marketing of solid and engineered hardwood flooring. Mullican's solid hardwood flooring is offered in 3/4-inch-thick planks made from such wood species as oak, maple, hickory, cherry, walnut, and birch, as well as more exotic species, including tigerwood, andiroba, and cumaru. These products are sold through such lines as ST. ANDREWS, OL VIRGINIAN, QUAIL HOLLOW, EXOTIC, MUIRFIELD, MERIDIAN POINTE, CASTILLIAN, KNOB CREEK, CHATELAINE, and WILLIAMSBURG. ST. ANDREWS, OL VIRGINIAN, QUAIL HOLLOW, and EXOTIC types are offered with traditional finishes, square ends, and microbeveled edges; while MUIRFIELD varieties have slightly angled tops with microbeveled ends and edges designed to better mask imperfections in the subflooring.

OTHER STUDIES

Decorative Laminates

Demand for decorative laminates in the US will rise 4.1 percent per year to 11.9 billion square feet in 2018. Of the two largest markets, cabinets will outpace furniture based on a rebound in residential construction spending. Within the dominant low-pressure laminate segment, vinyl films and saturated papers will be the fastest growing types. This study analyzes the 9.8 billion square foot US decorative laminates industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3127 February 2014 \$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

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

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

World Flooring & Carpets

World flooring and carpet demand will rise 4.9 percent yearly to 18.6 billion square meters in 2016. The Asia/Pacific region will see the most rapid growth. Nonresidential buildings will be the fastest growing market, while nonresilient flooring will pace products. North America will offer the best prospects for carpets and rugs. This study analyzes the 14.6 billion square meter world flooring and carpet industry, with forecasts for 2016 and 2021 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2981 January 2013 \$6300

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)