

**CLICK TO VIEW**

Table of Contents **2**

List of Tables &  
Charts **3**

Study Overview **4**

Sample Text, Table  
& Chart **5**

Sample Profile, Table &  
Study Coverage **6**

Order Form & Corporate  
Use License **7**

About Freedonia,  
Custom Research,  
Related Studies **8**

# Carpets & Rugs

---

US Industry Study with Forecasts for **2019 & 2024**

---

Study #3266 | March 2015 | \$5300 | 307 pages

---

[www.freedoniagroup.com](http://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

Email: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General.....	4
Macroeconomic Trends .....	5
Consumer Trends .....	9
Consumer Spending.....	10
Consumer Financing.....	13
Demographic Trends.....	16
Building Construction Trends.....	20
Residential Buildings.....	23
Housing Completions.....	25
Residential Floor Space.....	30
Improvements & Repairs.....	32
Nonresidential Buildings .....	34
New Construction.....	34
Nonresidential Floor Space .....	37
Improvements & Repairs.....	40
Transportation Equipment Trends.....	42
Motor Vehicles .....	42
Other Transportation Equipment.....	45
Pricing.....	48
Historical Market Trends.....	50
Environmental & Regulatory Issues.....	54
Carpet Recycling & Material	
Reclamation Programs.....	55
Carpet Collection Activities.....	55
Carpet Material Recycling.....	56
Use of Reclaimed PET.....	59
Indoor Air Quality .....	60
Green Building Practices.....	63
LEED .....	63
Other Certification Programs.....	65
Other Issues .....	66
Foreign Trade .....	67
Imports.....	68
Exports .....	70
Competitive Floor Coverings Outlook .....	72
World Carpet & Rug Outlook.....	74

### MATERIALS

General.....	77
Face Fibers .....	80
Nylon .....	83
Polyester .....	86
Polypropylene .....	89
Wool & Other Fibers.....	91

Primary Backing .....	93
Secondary Backing.....	96
Adhesives.....	98
Styrene-Butadiene Latex .....	100
Other Adhesives.....	101

### PRODUCTS

General.....	104
Demand by Area .....	105
Demand by Value.....	109
Tufted Carpets & Rugs .....	113
Broadloom.....	117
Vehicular Carpets & Rugs .....	121
Carpet Tile.....	123
Scatter Rugs, Bath Mats, & Accent Rugs .....	126
Artificial Grass .....	129
Woven Carpets & Rugs.....	132
Axminster .....	136
Wilton .....	137
Velvet.....	138
Other Carpets & Rugs.....	138
Needlepunched.....	142
All Other .....	143

### MARKETS

General.....	144
Residential .....	147
Residential Floor Covering Overview .....	147
Residential Carpet & Rug Demand .....	149
New .....	152
Replacement & Remodeling.....	154
Demand by Housing Type .....	157
Single-Family .....	159
Multifamily Housing.....	162
Manufactured Housing.....	164
Nonresidential Buildings.....	166
Nonresidential Floor Covering Overview... ..	167
Nonresidential Carpet & Rug Demand .....	168
New .....	171
Replacement & Remodeling.....	174
Demand by Building Type.....	177
Office & Commercial .....	178
Institutional .....	182
Industrial.....	185
Other Nonresidential Buildings.....	187
Transportation Equipment .....	189
Motor Vehicles .....	192
Other Transportation Equipment.....	194

### INDUSTRY STRUCTURE

General.....	196
Industry Composition.....	197
Market Share .....	200
Competitive Strategies .....	203
Product Development .....	204
Manufacturing.....	207
Marketing.....	208
Distribution.....	211
Mergers & Acquisitions .....	215
Cooperative Agreements .....	218

### COMPANY PROFILES

Abbey Carpet.....	222
Ascend Performance Materials .....	223
Astroturf LLC.....	224
Autoneum Holding .....	227
BASF SE.....	229
Beaulieu Group .....	230
Bentley Mills .....	234
Berkshire Hathaway .....	236
Capel Incorporated .....	241
Cargill Incorporated.....	244
Dixie Group.....	246
Dow Chemical.....	250
DuPont (El) de Nemours .....	251
Engineered Floors .....	253
Feizy Import and Export.....	254
Interface Incorporated .....	256
International Automotive Components .....	258
J&J Industries .....	260
Koch Industries .....	263
Kraus Group .....	266
Mannington Mills .....	268
Maples Industries .....	270
Mc Three Group .....	271
Milliken & Company.....	272
Mohawk Industries .....	275
Nourison Rug.....	279
Oriental Weavers .....	282
Propex Operating Company.....	286
Ronile Incorporated.....	287
Royalty Carpet Mills .....	289
Scott Group Custom Carpets.....	291
Surya Incorporated.....	292
Tai Ping Carpets International.....	294
Tarkett SA.....	296
Textile Rubber & Chemical .....	301
3M Company .....	304
Trinseo SA.....	305

## List of Tables

### EXECUTIVE SUMMARY

1 Summary Table ..... 3

### MARKET ENVIRONMENT

1 Macroeconomic Indicators ..... 9  
 2 Personal Consumption Expenditures... 12  
 3 Consumer Financing Environment,  
 2004-2014 ..... 15  
 4 Population & Households ..... 20  
 5 Building Construction Expenditures..... 22  
 6 Residential Building Construction  
 Expenditures..... 25  
 7 New Housing Indicators ..... 30  
 8 Residential Floor Space ..... 32  
 9 Residential Improvement  
 & Repair Expenditures..... 34  
 10 Nonresidential Building  
 Construction Expenditures ..... 37  
 11 Nonresidential Building Floor Space .... 40  
 12 Nonresidential Building Improvement  
 & Repair Expenditures..... 41  
 13 Motor Vehicle Indicators ..... 45  
 14 Transportation Equipment Shipments. 48  
 15 Carpet & Rug Pricing Trends..... 50  
 16 Carpet & Rug Historical Market  
 Trends, 2004-2014 ..... 53  
 17 Carpet & Rug Foreign Trade ..... 68  
 18 Floor Covering Demand ..... 73

### MATERIALS

1 Carpet & Rug Material Consumption ... 79  
 2 Face Fiber Consumption ..... 82  
 3 Nylon Face Fiber Consumption ..... 85  
 4 Polyester Face Fiber Consumption ..... 89  
 5 Polypropylene Face  
 Fiber Consumption ..... 91  
 6 Wool/Other Face Fibers Consumption. 93  
 7 Primary Backing Consumption..... 95  
 8 Secondary Backing Consumption ..... 98  
 9 Adhesives Consumption ..... 100

### PRODUCTS

1 Carpet & Rug Supply &  
 Demand by Area ..... 109

2 Carpet & Rug Supply &  
 Demand by Value..... 111  
 3 Tufted Carpet & Rug  
 Supply & Demand ..... 116  
 4 Broadloom Carpet & Rug Demand..... 121  
 5 Vehicular Carpet & Rug Demand ..... 123  
 6 Carpet Tile Demand..... 126  
 7 Scatter Rugs, Bath Mats, &  
 Accent Rugs Demand ..... 128  
 8 Artificial Grass Demand ..... 132  
 9 Woven Carpet & Rug  
 Supply & Demand ..... 136  
 10 Other Carpet & Rug  
 Supply & Demand ..... 141

### MARKETS

1 Carpet & Rug Demand by Market..... 146  
 2 Residential Carpet & Rug Demand  
 by Application & Product ..... 152  
 3 New Residential Carpet  
 & Rug Demand ..... 154  
 4 Residential Replacement & Remodeling  
 Carpet & Rug Demand ..... 157  
 5 Residential Carpet & Rug Demand  
 by Housing Type..... 159  
 6 Single-Family Housing Carpet  
 & Rug Demand ..... 161  
 7 Multifamily Housing Carpet  
 & Rug Demand ..... 164  
 8 Manufactured Housing Carpet  
 & Rug Demand ..... 166  
 9 Nonresidential Building Carpet & Rug  
 Demand by Application & Product. 171  
 10 New Nonresidential Carpet  
 & Rug Demand ..... 174  
 11 Nonresidential Replacement &  
 Remodeling Carpet & Rug Demand 177  
 12 Nonresidential Carpet & Rug  
 Demand by Building Type..... 178  
 13 Office & Commercial Building  
 Carpet & Rug Demand ..... 181  
 14 Institutional Building Carpet  
 & Rug Demand ..... 185  
 15 Industrial Building Carpet  
 & Rug Demand ..... 187  
 16 Other Nonresidential Building  
 Carpet & Rug Demand ..... 189

17 Transportation Equipment  
 Carpet & Rug Demand ..... 192  
 18 Motor Vehicle Carpet &  
 Rug Demand ..... 194  
 19 Other Transportation Equipment  
 Carpet & Rug Demand ..... 195

### INDUSTRY STRUCTURE

1 Carpet & Rug Sales by  
 Company, 2014 ..... 199  
 2 Selected Acquisitions & Divestitures . 217  
 3 Selected Cooperative Agreements ..... 219

## List of Charts

### MARKET ENVIRONMENT

1 Carpet & Rug Demand, 2004-2014 ..... 54  
 2 Carpet & Rug Imports  
 by Source, 2014..... 70  
 3 Carpet & Rug Exports by  
 Destination, 2014..... 71

### MATERIALS

1 Carpet & Rug Material  
 Consumption, 2014 ..... 79  
 2 Face Fiber Consumption  
 by Type, 2014..... 82

### PRODUCTS

1 Carpet & Rug Demand  
 by Type, 2014..... 112  
 2 Tufted Carpet & Rug Demand  
 by Type, 2014..... 117

### MARKETS

1 Carpet & Rug Demand  
 by Market, 2014..... 146  
 2 Residential Floor Coverings Demand  
 by Product Type, 2004-2024 ..... 149

### INDUSTRY STRUCTURE

1 US Carpet & Rug Market  
 Share, 2014 ..... 200



*Growth in US carpet and rug demand will be spurred by rebounding building construction expenditures and by continuing consumer interest in replacing worn or out-dated carpets and rugs.*

## US demand to rise 4.5% annually through 2019

Demand for carpets and rugs in the US is projected to advance 4.5 percent annually to 14.6 billion square feet in 2019, valued at \$16.2 billion. Growth will be spurred by rebounding building construction expenditures and continuing consumer interest in replacement and remodeling projects, such as the removal of worn or out-of-style carpets and rugs. However, more rapid gains will be checked by competition from hard surface flooring, which has taken market share from carpets and rugs in the floor covering market over the past decade and will continue to do so.

## Carpet tiles to pace tufted carpet & rug segment

Among carpet and rug types, tufted products accounted for the largest share of demand in area terms in 2014 with 82 percent. These carpets dominate demand due to their low cost, ease of installation, and favorable aesthetic and performance properties. Tufted carpet and rug demand is expected to rise as building construction expenditures increase. Carpet tiles will see the fastest growth because they offer the look of broadloom carpet, but can be more easily removed or replaced in case of staining or premature wear and tear, boosting their use in nonresidential structures. However, broadloom carpets will account for the largest share of tufted carpet and rug demand in 2019 due to their moderate cost and consum-

## US Carpet & Rug Demand, 2019 (14.6 billion square feet)



Tufted

Woven

Other

er desire for wall to wall carpeting, particularly in residences.

## New housing to be fastest growing residential market

The residential market, which accounted for 62 percent of carpet and rug demand in 2014, will remain the leading end use for carpets and rugs. The new housing segment will see the fastest growth in demand as housing completions rise at a double-digit pace through 2019. Carpets and rugs are often installed in newly built houses because of their moderate cost, ease of installation, and favorable aesthetics. The larger residential remodeling and replacement segment will see gains as homeowners replace older or

worn carpets and rugs. However, advances will be checked by rising interest in hard surface flooring as homeowners opt for these products -- despite a higher initial cost than carpets and rugs -- because they are seen as being more durable or attractive.

Carpet and rug demand in the nonresidential market will be driven by rising spending on office and commercial and institutional construction, the nonresidential markets where carpets and rugs are used most extensively. In the transportation equipment segment, demand is forecast to rise modestly as motor vehicle production decelerates from the strong pace seen between 2009 and 2014.

Copyright 2015 The Freedonia Group, Inc.

[Click here to purchase online](#)

## Sample Text, Table & Chart

### MATERIALS

#### Face Fibers

Consumption of face fibers used in carpets and rugs total billion pounds in 2014, a steep decline from the level of dem 2004. Use of face fibers dropped rapidly as carpet and rug sh in the face of declining demand for those floor covering matc the 2007-2009 recessions. Demand for face fibers rose at a m between 2009 and 2014, reflective of the modest growth in U and rug manufacturing activity during that time.

Demand for face fibers used in carpets and rugs is proje increase billion pounds in 2019. C be boost US carpet and rug manu activity, including construction expen support, boosting domestic prod Moreover, a high level of US drilling manufacturers to expand p "re-shore" facilities back to the US. The ties will include those by participants in the carpet and rug in manufacturers can market their products as domestically ma sales.

Nylon was the leading material used in the manufacture of face fibers in 2014, totaling 44 percent of consumption. However, nylon face fibers, which accounted for 62 percent of use in 2004, will be overtaken by polyester fibers by 2019. These fibers -- primarily those made from PET -- have seen strong growth over the past decade because of their low cost, favorable performance properties, and perception as being envi-ronmentally friendly. Polypropylene fibers, which have seen carpet manufacturing plummet in the face of competition fro see minimal gains going forward as producers continue to se fibers for their carpets and rugs. Other face fibers include the wool, cotton, and other materials. These niche products are r in the manufacture of high-end carpets.

TABLE IV-3

TUFTED CARPET & RUG SUPPLY & DEMAND  
(million square feet)

Item	2004	2009	2014	2019	2024
Carpet & Rug Demand (mil \$)					
% tufted carpets & rugs					
Tufted Carpet & Rug Demand (mil \$)					
\$/sq ft					
Tufted Carpet & Rug Demand					
Demand by Product:					
Broadloom					
Scatter Rugs/Bath Mats/Accent Rugs					
Vehicular					
Carpet Tiles					
Artificial Grass					
Demand by Market:					
Residential					
Nonresidential					
Transportation Equipment					
- net imports					
Tufted Carpet & Rug Shipments					

SAMPLE  
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

US CARPET & RUG MARKET SHARE, 2014  
(\$11.6 billion)



SAMPLE  
CHART

## Sample Profile & Table, & Study Coverage

**TABLE V-10**  
**NEW NONRESIDENTIAL CARPET & RUG DEMAND**  
 (million square feet)

Item	2004	2009	2014	2019	2024
Nonres Bldg Construction (bil 2009\$) sq ft floor covering/000\$ construction					
New Nonres Floor Covering Demand % carpet & rug					
New Nonres Carpet & Rug Demand Office & Commercial Institutional Industrial Other					
% new Nonresidential Carpet & Rug Demand					

Source: The Freedonia Group, Inc.

### COMPANY PROFILES

#### Engineered Floors LLC

3510 Corporate Drive  
 Dalton, GA 30721  
 706-625-4224

<http://www.>

Annual S  
 Employ

Key Pro m carpet

Engine of polyester fiber  
 broadloom multi-family end uses.  
 The Company sells carpets via numerous flooring retailers in the US.

The Company manufactures all of its carpets from its proprietary solution-dyed bulk continuous filament polyester carpet fiber marketed under the PURECOLOR brand name. According to Engineered Floors, the color of PURECOLOR fiber will not fade due to sunlight, wear off, or bleach out from spot cleaning. The Company's broadloom carpets include the PURECOLOR, PURESOF CASHMERE, and DREAM WEAVER lines, which feature Engineered Floors' SOILSHIELD technology to help block soil from adhering to carpet fibers. Specific products include the ACCURATE, ADVENTUROUS, COIN TOSS, ELEGANT TOUCH, END ZONE, DYNASTY, HEISMAN, LOCKER ROOM, LUZURIANT, MARDI GRAS, PICK 6, PRIME TIME, PURECOLOR, SERENITY, SOFT HARMONY, SYMPHONY, THE BEAR, and TRANQUILITY collections.

Engineered Floors operates manufacturing sites in Calhoun and Dalton, Georgia. The Company doubled the capacity of the first Dalton plant in 2013, and the second Dalton plant began operation in 2014.

**SAMPLE  
 PROFILE**

**SAMPLE  
 TABLE**

### STUDY COVERAGE

This Freedonia study, *Carpets & Rugs*, presents historical demand data (2004, 2009, 2014) plus projections (2019, 2024) by material, product and market. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 37 US industry competitors.

# Order Information

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

# Freedonia

ONLINE: [www.freedoniagroup.com](http://www.freedoniagroup.com)

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

## Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at [info@freedoniagroup.com](mailto:info@freedoniagroup.com). Credit cards accepted.

## Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

## Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

## Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, email it to coworkers around the world, or print it as many times as you like.

[Click here to learn more about the Corporate Use License](#)

## Order Form

F-WEB.3266

Carpets & Rugs .....\$5300

Corporate Use License (add to study price) \* +\$2600

— Additional Print Copies @ \$600 each \*  
Total (including selected option) \$ \_\_\_\_\_

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 8% sales tax)

Bill my company     American Express     MasterCard     Visa

Credit Card #		Expires mm/yy	Security Code
---------------	--	---------------	---------------

Signature \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Division \_\_\_\_\_

Street \_\_\_\_\_  
(No PO Box please)

City/State/Zip \_\_\_\_\_

Country \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

\* Please check appropriate option and sign below to order an electronic version of the study.

### Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature \_\_\_\_\_

### Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only \_\_\_ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature \_\_\_\_\_

The Freedonia Group, Inc. • 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Website: [www.freedoniagroup.com](http://www.freedoniagroup.com)  
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • Email: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)



## Related Studies

### Hard Surface Flooring

This study analyzes the US hard surface flooring industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by flooring product (e.g., vinyl, rubber, linoleum, tile, laminate, wood) 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 competitors.

#3284.....April 2015.....\$5300

### World Coated Fabrics

This study analyzes the world coated fabric industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (polymer-coated fabrics, rubber-coated fabrics), market (e.g., transportation, protective clothing, industrial, furniture, apparel), world region, and for 19 major countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3276.....April 2015.....\$6300

### World Flooring & Carpets

Through 2018, global demand for floor coverings is forecast to advance 4.5 percent annually to 19.4 billion square meters, valued at \$325 billion. Nonresilient flooring will remain the dominant product segment and will grow the fastest. China and the United States will be the two fastest growing major markets. This study analyzes the 15.5 billion square meter world flooring and carpet industry, with forecasts for 2018 and 2023 by product, market, world region, and for 20 countries. The study also evaluates company market share and profiles industry players.

#3227.....December 2014.....\$6500

### Wood & Competitive Decking

US decking demand will rise 2.4 percent annually through 2018 to 3.5 billion lineal feet, valued at \$6.5 billion. Plastic and wood-plastic composite decking will grow the fastest, based on their low maintenance requirements and long lifespans. The residential market will remain dominant while nonresidential decking grows the fastest. This study analyzes the 3.1 billion lineal foot US decking industry, with forecasts for 2018 and 2023 by material, market, application and US region. The study also evaluates company market share and profiles industry competitors.

#3194.....September 2014.....\$5500

### Coated Fabrics

US demand for coated fabrics is projected to advance 3.2 percent per year to 680 million square yards in 2018. The large motor vehicle market will drive gains, promoted by a higher number of air bags -- usually employing silicone-coated nylon -- per light vehicle. Smaller markets such as awnings, canopies and wall coverings will grow the fastest. This study analyzes the 580 million square yard US coated fabric industry, with forecasts for 2018 and 2023 by product, substrate and market. The study also evaluates company market share and profiles industry players.

#3176.....July 2014.....\$5300

## 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 and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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

## Freedonia Custom Research

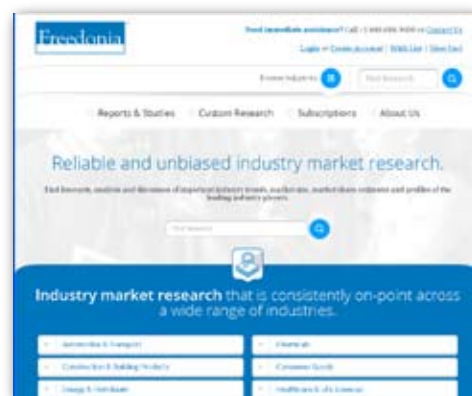
Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. 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](#)