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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**

# Hard Surface Flooring

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

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Study #3284 | April 2015 | \$5300 | 343 pages

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[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.....                       | 15 |
| Building Construction Trends.....             | 20 |
| Residential Buildings .....                   | 22 |
| Housing Completions.....                      | 24 |
| Residential Floor Space .....                 | 29 |
| Improvements & Repairs.....                   | 31 |
| Nonresidential Buildings.....                 | 33 |
| New Construction .....                        | 34 |
| Nonresidential Building Floor Space .....     | 36 |
| Improvements & Repairs.....                   | 39 |
| Transportation Equipment Trends.....          | 41 |
| Motor Vehicles.....                           | 41 |
| Other Transportation Equipment.....           | 44 |
| Pricing.....                                  | 47 |
| Installed Costs.....                          | 49 |
| Historical Market Trends.....                 | 53 |
| Environmental & Regulatory Issues.....        | 56 |
| Recycling .....                               | 57 |
| Materials Renewability & Sustainability ..... | 59 |
| Green Building Practices.....                 | 62 |
| LEED.....                                     | 62 |
| Other Certification Programs .....            | 64 |
| Indoor Air Quality.....                       | 65 |
| Particulates & VOCs .....                     | 65 |
| Formaldehyde .....                            | 66 |
| Lacey Act .....                               | 69 |
| World Hard Surface Flooring Outlook.....      | 70 |
| Foreign Trade .....                           | 73 |
| Imports.....                                  | 75 |
| Exports .....                                 | 79 |
| Competitive Floor Coverings Outlook .....     | 80 |

### PRODUCTS

|                                     |     |
|-------------------------------------|-----|
| General.....                        | 83  |
| Supply & Demand.....                | 84  |
| Resilient Flooring .....            | 89  |
| Vinyl Flooring.....                 | 92  |
| Luxury Vinyl Tile .....             | 95  |
| Vinyl Sheet .....                   | 99  |
| Vinyl Composition & Other Tile..... | 103 |
| Market Share .....                  | 106 |

|                                  |     |
|----------------------------------|-----|
| Other Resilient Flooring .....   | 108 |
| Rubber.....                      | 109 |
| Linoleum .....                   | 111 |
| Cork .....                       | 112 |
| Asphalt & Other.....             | 114 |
| Nonresilient Flooring.....       | 114 |
| Decorative Tile Flooring .....   | 118 |
| Product Types.....               | 122 |
| Product Characteristics .....    | 124 |
| Market Share .....               | 126 |
| Wood Flooring.....               | 128 |
| Solid Wood Flooring .....        | 130 |
| Engineered Wood Flooring .....   | 133 |
| Market Share .....               | 137 |
| Laminate Flooring.....           | 138 |
| Products.....                    | 141 |
| Market Share .....               | 144 |
| Other Nonresilient Flooring..... | 145 |
| Seamless Flooring.....           | 147 |
| All Other .....                  | 148 |
| Bamboo.....                      | 149 |
| Grating.....                     | 150 |
| Polished Concrete.....           | 150 |
| Stone Slabs .....                | 151 |
| Tempered Glass .....             | 152 |
| Leather .....                    | 152 |

### MARKETS

|                                     |     |
|-------------------------------------|-----|
| General.....                        | 153 |
| Residential Buildings .....         | 156 |
| New Construction .....              | 161 |
| Replacement & Remodeling .....      | 164 |
| Demand by Housing Type.....         | 167 |
| Single-Family.....                  | 168 |
| Multifamily.....                    | 173 |
| Manufactured Housing .....          | 177 |
| Nonresidential Buildings.....       | 180 |
| New Construction .....              | 184 |
| Replacement & Remodeling .....      | 187 |
| Demand by Building Type.....        | 191 |
| Office & Commercial.....            | 193 |
| Institutional.....                  | 199 |
| Industrial .....                    | 203 |
| Other Nonresidential Buildings..... | 205 |
| Transportation Equipment .....      | 209 |
| Motor Vehicles.....                 | 210 |
| Other Transportation Equipment..... | 212 |

### INDUSTRY STRUCTURE

|              |     |
|--------------|-----|
| General..... | 215 |
|--------------|-----|

|                                |     |
|--------------------------------|-----|
| Industry Composition.....      | 216 |
| Market Share .....             | 219 |
| Competitive Strategies .....   | 223 |
| Product Development .....      | 225 |
| Vinyl Flooring.....            | 226 |
| Laminate Flooring.....         | 227 |
| Wood Flooring.....             | 229 |
| Decorative Tile Flooring ..... | 230 |
| Manufacturing.....             | 231 |
| Marketing.....                 | 233 |
| Distribution.....              | 236 |
| Mergers & Acquisitions .....   | 240 |
| Cooperative Agreements .....   | 242 |

### COMPANY PROFILES

|  |     |
|--|-----|
| Armstrong World Industries.....        | 246 |
| Beaulieu International.....            | 252 |
| Berkshire Hathaway .....               | 255 |
| Bilrite Corporation.....               | 259 |
| Clarion Industries.....                | 261 |
| Congoleum Corporation .....            | 262 |
| Crossville Incorporated .....          | 265 |
| DuPont (EI) de Nemours .....           | 268 |
| Earthwerks.....                        | 269 |
| ECORE International.....               | 272 |
| FloorFolio Industries.....             | 276 |
| Florim Ceramiche.....                  | 277 |
| Forbo Holding.....                     | 279 |
| Gerflor Group.....                     | 282 |
| Internacional de Ceramica.....         | 287 |
| IVC Group.....                         | 289 |
| Kaindl Flooring .....                  | 291 |
| Krono Holding .....                    | 292 |
| Mannington Mills .....                 | 294 |
| Maxwell Hardwood Flooring .....        | 301 |
| Metroflor Corporation.....             | 302 |
| Mohawk Industries .....                | 304 |
| Mullican Flooring.....                 | 309 |
| nora systems.....                      | 310 |
| Palo Duro Hardwoods.....               | 312 |
| Panariagroup Industrie Ceramiche ..... | 313 |
| Parterre Flooring Systems .....        | 316 |
| Porcelanosa Grupo .....                | 317 |
| QEP Company.....                       | 320 |
| Roppe Holding.....                     | 322 |
| RPM International.....                 | 326 |
| Somerset Wood Products .....           | 331 |
| Superior Manufacturing.....            | 332 |
| Tarkett SA.....                        | 335 |
| TOLI Corporation .....                 | 341 |
| VPI Corporation.....                   | 342 |

## 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 ..... 19  
 5 Building Construction Expenditures..... 22  
 6 Residential Building Construction  
 Expenditures..... 24  
 7 New Housing Indicators ..... 29  
 8 Existing Residential Floor Space..... 31  
 9 Residential Improvement  
 & Repair Expenditures..... 33  
 10 Nonresidential Building Construction  
 Expenditures..... 36  
 11 Nonresidential Building Floor Space .... 39  
 12 Nonresidential Building Improvement  
 & Repair Expenditures..... 40  
 13 Motor Vehicle Indicators ..... 44  
 14 Transportation Equipment Shipments. 47  
 15 Hard Surface Flooring Pricing Trends... 49  
 16 Hard Surface Flooring  
 Market, 2004-2014 ..... 55  
 17 Hard Surface Flooring Foreign Trade ... 75  
 18 Floor Coverings Demand ..... 82

### PRODUCTS

1 Hard Surface Flooring  
 Supply & Demand ..... 88  
 2 Resilient Flooring Supply & Demand .... 92  
 3 Vinyl Flooring Supply & Demand ..... 95  
 4 Luxury Vinyl Tile Flooring Demand ..... 99  
 5 Vinyl Sheet Flooring Demand ..... 103  
 6 Vinyl Composition & Other Vinyl  
 Tile Flooring Demand ..... 106  
 7 Other Resilient Flooring  
 Supply & Demand ..... 109  
 8 Nonresilient Flooring  
 Supply & Demand ..... 117  
 9 Decorative Tile Flooring  
 Supply & Demand ..... 122  
 10 Wood Flooring Supply & Demand ..... 130  
 11 Solid Wood Flooring Demand ..... 133  
 12 Engineered Wood Demand ..... 137

13 Laminate Flooring Supply & Demand 141  
 14 Other Nonresilient Flooring  
 Supply & Demand ..... 147

### MARKETS

1 Hard Surface Flooring  
 Demand by Market ..... 155  
 2 Residential Hard Surface Flooring  
 Demand by Application & Product . 161  
 3 New Residential Hard Surface  
 Flooring Demand ..... 163  
 4 Residential Replacement & Remodeling  
 Demand for Hard Surface Flooring 167  
 5 Residential Hard Surface Flooring  
 Demand by Housing Type..... 168  
 6 Single-Family Housing Hard Surface  
 Flooring Demand by  
 Application & Product..... 173  
 7 Multifamily Housing Hard Surface  
 Flooring Demand by  
 Application & Product..... 177  
 8 Manufactured Housing Hard Surface  
 Flooring Demand by  
 Application & Product..... 179  
 9 Nonresidential Hard Surface Flooring  
 Demand by Application & Product . 184  
 10 New Nonresidential Hard  
 Surface Flooring Demand ..... 187  
 11 Nonresidential Replacement &  
 Remodeling Hard Surface  
 Flooring Demand ..... 190  
 12 Nonresidential Hard Surface Flooring  
 Demand by Building Type..... 192  
 13 Office & Commercial Hard Surface  
 Flooring Demand by  
 Application & Product..... 198  
 14 Institutional Hard Surface Flooring  
 Demand by Application & Product . 203  
 15 Industrial Hard Surface Flooring  
 Demand by Application & Product . 205  
 16 Other Nonresidential Hard Surface  
 Flooring Demand by  
 Application & Product..... 208  
 17 Transportation Equipment Hard  
 Surface Flooring Demand ..... 210  
 18 Motor Vehicle Hard Surface Flooring  
 Demand by Application & Product . 212  
 19 Other Transportation Equipment  
 Hard Surface Flooring  
 Demand by Product..... 214

### INDUSTRY STRUCTURE

1 US Hard Surface Flooring Sales  
 by Company, 2014 ..... 218  
 2 Selected Acquisitions & Divestitures .. 241  
 3 Selected Cooperative Agreements ..... 243

## List of Charts

### MARKET ENVIRONMENT

1 Installed Costs for Selected  
 Residential Hard Surface  
 Flooring Products, 2014 ..... 53  
 2 Hard Surface Flooring  
 Market, 2004-2014 ..... 56  
 3 World Hard Surface Flooring  
 Demand, 2014 ..... 73

### PRODUCTS

1 Hard Surface Flooring Demand, 2014 .. 89  
 2 Vinyl Flooring Market Share, 2014 ..... 108  
 3 Nonresilient Flooring Demand  
 by Type, 2014..... 118  
 4 Decorative Tile Flooring  
 Market Share, 2014..... 127  
 5 Wood Flooring Market Share, 2014 .... 138  
 6 Laminate Flooring  
 Market Share, 2014..... 145

### MARKETS

1 Hard Surface Flooring Demand  
 by Market, 2014..... 156  
 2 Nonresidential Hard Surface Flooring  
 Demand by Building Type, 2014 ..... 192

### INDUSTRY STRUCTURE

1 US Hard Surface Flooring  
 Market Share, 2014..... 219

*Growth will be spurred by increases in building construction and improvement and repair spending, as well as by growing interest in hard surface flooring as an alternative to traditional installed carpeting.*

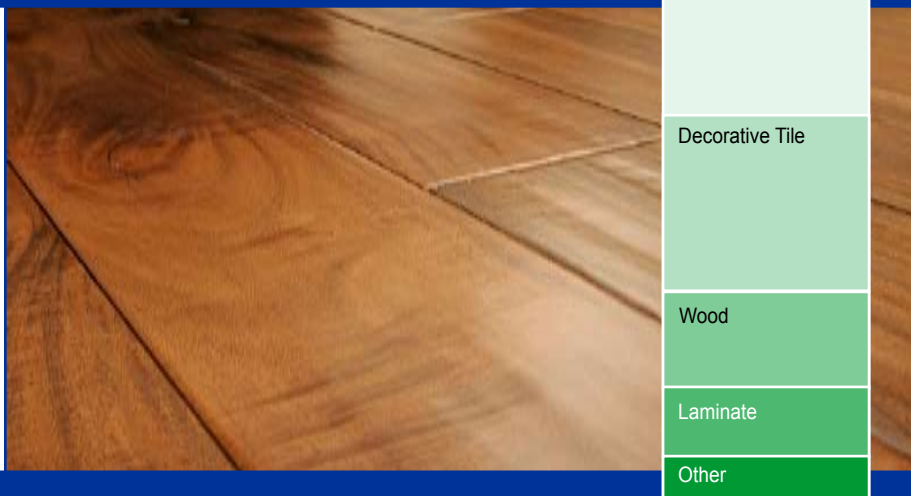
## US demand to rise 6.1% annually through 2019

Demand for hard surface flooring in the US is forecast to advance 6.1 percent per year to 11.3 billion square feet in 2019, valued at \$16.7 billion. Growth will be spurred by increases in building construction and improvement and repair spending. Gains will also result as interest increases in hard surface flooring as an alternative to traditional installed carpeting. Consumers select hard surface flooring because of its favorable performance properties, such as durability and low maintenance requirements, or because it enhances the appearance and value of structures in which it is installed.

## Residential market to be fastest growing

The residential market, which accounted for the largest share of hard surface flooring demand in 2014, is expected to post the fastest growth through 2019. Gains in housing completions will spur demand in the new housing segment, while homeowner efforts to improve the aesthetics of their houses will support replacement and remodeling demand. Advances will also benefit from consumer interest in using hard surface flooring in rooms -- such as living and dining areas -- where carpeting has predominated in the past. In these cases, products such as hardwood, vinyl, and decorative tile benefit from their long lifespans and pleasing appearance.

## US Hard Surface Flooring Demand, 2019 (11.3 billion square feet)



## Nonresidential market to be driven by office & commercial segment

In the nonresidential market double-digit annual advances in office and commercial construction will boost demand for hard surface flooring as more structures like shopping malls and office buildings -- where hard surface flooring is often specified because of its durability and slip resistance -- are erected. Increasing use in the institutional segment will also support demand as owners and managers of healthcare and educational facilities install hard surface flooring due to its low maintenance needs and because it generally does not affect indoor air quality.

## Vinyl flooring to lead gains

Among all hard surface flooring types, vinyl flooring is expected to post the most rapid gains in demand, driven by the increasing use of luxury vinyl tile (LVT). Consumers in both the residential and nonresidential markets will increasingly install this material because of its glossy surface and its ability to mimic more expensive materials, such as hardwood flooring and decorative tile. Hardwood and decorative tile flooring demand will also rise at a strong pace going forward. Hardwood flooring demand will be boosted by its aesthetic qualities, while decorative tile demand will be supported by tile's moderate cost and long lifespan.

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## Sample Text, Table & Chart

### PRODUCTS

#### Wood Flooring

Demand for wood flooring totaled 1.3 billion square feet a sharp increase from 2009. Gains during that time were driven by increasing consumer interest in the product because of its favorable aesthetics. Homeowners looking to upgrade the appearance of their homes could do so by installing wood flooring. Moreover, wood prices were low between 2009 and 2011, making wood flooring more affordable for middle-income consumers, thus spurring the expansion of the product to a broader customer base.

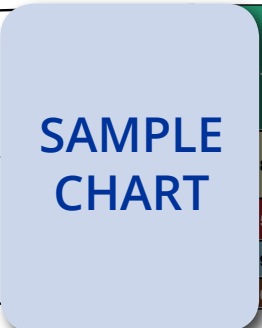
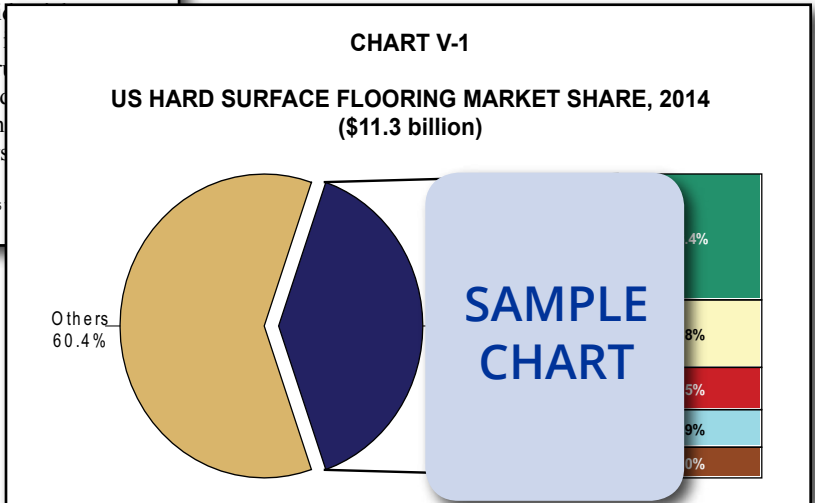
...percent per...  
 ...on. Advan...  
 ...action expe...  
 ...make their p...  
 ...all wood flo...  
 ...and for wo...  
 ...will also see strong gains going forward. Homeowners will continue to select wood flooring as a way to improve the appearance and value of their residences. While some homeowners are reluctant to install wood flooring in kitchens and bathrooms because of concerns about its moisture resistance, wood flooring will see increasing use in dining, living, and family rooms. Wood flooring is seen as a product that adds to the warmth and character -- and thus value -- of a residence.

Demand for wood flooring will also be supported by its increasing use in nonresidential building construction applications. While wood flooring has traditionally not been specified in many nonresidential structures because of its cost, consumers will more often specify wood flooring because of its favorable aesthetics. In addition to providing a more traditional appearance in such structures, architects and builders and managers will increasingly install wood flooring in such structures as office buildings, upscale retail outlets, commercial centers...

**TABLE IV-2**  
**RESIDENTIAL HARD SURFACE FLOORING DEMAND**  
**BY APPLICATION & PRODUCT**  
 (million square feet)

| Item                                       | 2004 | 2009 | 2014 | 2019 | 2024 |
|--|------|------|------|------|------|
| Res Building I&R Expenditures (bil 2009\$) |      |      |      |      |      |
| sq ft floor coverings/000\$ expend         |      |      |      |      |      |
| Residential Floor Coverings Demand         |      |      |      |      |      |
| % hard surface flooring                    |      |      |      |      |      |
| Residential Hard Surface Flooring Demand   |      |      |      |      |      |
| By Application:                            |      |      |      |      |      |
| New Construction                           |      |      |      |      |      |
| Replacement & Remodeling                   |      |      |      |      |      |
| By Product:                                |      |      |      |      |      |
| Vinyl Flooring                             |      |      |      |      |      |
| Decorative Tile Flooring                   |      |      |      |      |      |
| Wood Flooring                              |      |      |      |      |      |
| Laminate Flooring                          |      |      |      |      |      |
| Other Hard Surface Flooring                |      |      |      |      |      |
| % residential                              |      |      |      |      |      |
| Hard Surface Flooring Demand               |      |      |      |      |      |

Source: The Freedonia Group, Inc.



## Sample Profile & Table, & Study Coverage

**TABLE III-3**  
**VINYL FLOORING SUPPLY & DEMAND**  
 (million square feet)

| Item  | 2004 | 2009 | 2014 | 2019 | 2024 |
|---|------|------|------|------|------|
| Resilient Flooring Demand<br>% vinyl  |      |      |      |      |      |
| Vinyl Flooring Demand<br>Luxury Vinyl Tile<br>Vinyl Sheet<br>Vinyl Composition & Other Tile |      |      |      |      |      |
| - net imports   |      |      |      |      |      |
| Vinyl Flooring Shipments  |      |      |      |      |      |
| \$/sq ft  |      |      |      |      |      |
| Vinyl Flooring Demand (mil \$)  |      |      |      |      |      |

Source: The Freedonia Group, Inc.



### COMPANY PROFILES

**Congoleum Corporation**  
 3500 Quakerbridge Road  
 Mercerville, NJ 08619  
 609-584-3000  
<http://www.congoleum.com>

Annual Sales:  
 Employment:  
 Key Products:

Congoleum is a leading manufacturer of commercial vinyl flooring products and a publicly traded, privately held firm.

The Company participates in the US hard surface flooring industry through the manufacture and marketing of residential and commercial vinyl plank, tile, and sheet flooring products. Congoleum conducts manufacturing operations in Trenton, New Jersey; Marcus Hook and Trainer, Pennsylvania; and Finksburg, Maryland. In October 2014, the Company sold a one-million-square-foot plant and warehouse in Trenton, New Jersey. Operations from the site, which closed in September 2014 and employed 65, were moved to its other locations in New Jersey and Pennsylvania. Congoleum markets its vinyl flooring products in the US via a network of home centers and authorized distributors.

**Vinyl Plank & Tile Flooring** -- Congoleum's vinyl plank and tile flooring products are typically constructed from a limestone composite base with a photographic image encapsulated under a wear surface. These products are manufactured in a wide variety of sizes and thicknesses, and can be installed using the Company's UNDERFLOOR floating floor system. The Company's vinyl plank flooring for residential and commercial applications, which resembles such wood species as oak and maple, is sold through the STRUCTURE, CAREFREE



## Related Studies

### Carpets & Rugs

US carpet and rug demand will rise 4.5 percent annually to 14.6 billion square feet in 2019, valued at \$16.2 billion. The residential market will remain the leading end use. Nonresidential demand will be driven by office, commercial, and institutional construction. The dominant tufted carpet and rugs segment will grow the fastest, led by carpet tiles. This study analyzes the 11.7 billion square foot US carpet and rug industry, with forecasts for 2019 and 2024 by material, product, and market. The study also evaluates company market share and profiles industry players.

#3266..... March 2015.....\$5300

### 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

### Bricks, Blocks & Pavers

Demand for bricks, blocks and pavers in the US is forecast to rise 8.8 percent per annum from a low 2013 base to \$8.9 billion in 2018. Bricks, typically made of clay, will see the most rapid growth of any product, driven by a rebound in new housing construction. Pavers will be the second fastest growing type, driven in part by interest in "green" building materials such as permeable pavers. This study analyzes the \$5.8 billion US brick, block and paver industry, with forecasts for 2018 and 2023 by product, material, market, application and US region. The study also evaluates company market share and profiles industry players.

#3236..... November 2014.....\$5200

### World Decorative Laminates

Global demand for decorative laminates is expected to rise 5.6 percent per year to 10.7 billion square meters in 2018, valued at \$40.8 billion. The Asia/Pacific region will dominate demand and be the fastest growing market, based on its leading position in engineered wood production, which is often given a laminate layer. This study analyzes the 8.1 billion square meter world decorative laminates 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.

#3202..... November 2014.....\$6300

### 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

## 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:

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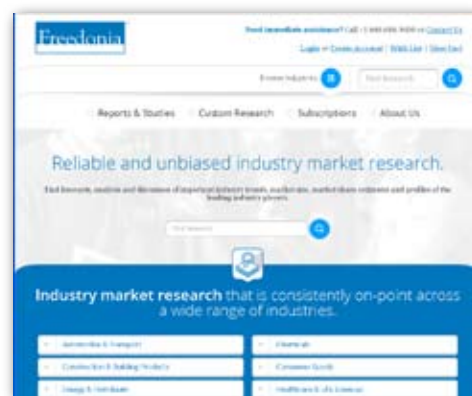
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