Hard Surface Flooring

US Industry Study with Forecasts for 2019 & 2024

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

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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 lifespan and pleasing appearance.

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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Wood Flooring

Demand for wood flooring totaled 1.3 billion square feet in 2014, 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.

Demand for wood flooring is forecast to rise 6.2 percent per year to 1.7 billion square feet in 2019, valued at $4.0 billion. Advances will be fueled by growth in residential building construction expenditures. In the new housing segment, builders looking to make their properties more marketable to potential purchasers may install wood flooring to do so. Residential replacement and renovation demand for wood flooring 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 due to its favorable aesthetics. In addition to providing a more traditional appearance in such structures, architects and building owners and managers will increasingly install wood flooring in such settings as office buildings, upscale retail outlets, commercial centers, and restaurants.

### TABLE IV-2

**RESIDENTIAL HARD SURFACE FLOORING DEMAND BY APPLICATION & PRODUCT**

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Res Building I&amp;R Expenditures (bil 2009$)</td>
<td>243.3</td>
<td>198.1</td>
<td>196.0</td>
<td>229.5</td>
<td>251.0</td>
</tr>
<tr>
<td>sq ft floor coverings/000$ expend</td>
<td>73</td>
<td>46</td>
<td>58</td>
<td>65</td>
<td>69</td>
</tr>
<tr>
<td>Residential Floor Coverings Demand</td>
<td>177</td>
<td>20</td>
<td>9180</td>
<td>11380</td>
<td>15020</td>
</tr>
<tr>
<td>% hard surface flooring</td>
<td>26.1</td>
<td>31.6</td>
<td>36.4</td>
<td>38.3</td>
<td>39.9</td>
</tr>
<tr>
<td>Residential Hard Surface Flooring Demand</td>
<td>46.20</td>
<td>29.05</td>
<td>41.40</td>
<td>57.60</td>
<td>69.10</td>
</tr>
<tr>
<td>By Application:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Construction</td>
<td>121</td>
<td>525</td>
<td>730</td>
<td>1260</td>
<td>1560</td>
</tr>
<tr>
<td>Replacement &amp; Remodeling</td>
<td>341</td>
<td>2380</td>
<td>3410</td>
<td>4500</td>
<td>5350</td>
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<tr>
<td>By Product:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vinyl Flooring</td>
<td>1300</td>
<td>735</td>
<td>925</td>
<td>1425</td>
<td>1780</td>
</tr>
<tr>
<td>Decorative Tile Flooring</td>
<td>1360</td>
<td>740</td>
<td>1270</td>
<td>1790</td>
<td>2145</td>
</tr>
<tr>
<td>Wood Flooring</td>
<td>775</td>
<td>550</td>
<td>935</td>
<td>1300</td>
<td>1535</td>
</tr>
<tr>
<td>Laminate Flooring</td>
<td>1055</td>
<td>780</td>
<td>910</td>
<td>1110</td>
<td>1275</td>
</tr>
<tr>
<td>Other Hard Surface Flooring</td>
<td>130</td>
<td>100</td>
<td>100</td>
<td>135</td>
<td>175</td>
</tr>
<tr>
<td>% residential</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hard Surface Flooring Demand</td>
<td>46.20</td>
<td>29.05</td>
<td>41.40</td>
<td>57.60</td>
<td>69.10</td>
</tr>
</tbody>
</table>

*Source: The Freedonia Group, Inc.*
Sample Profile & Table, & Study Coverage

COMPANY PROFILES

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

Annual Sales: $150 million (estimated)
Employment: 250 (estimated)
Key Products: vinyl plank, tile, and sheet flooring

Congoleum is a manufacturer of residential and commercial vinyl flooring products. The company 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

TABLE III-3

VINYL FLOORING SUPPLY & DEMAND

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resilient Flooring Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% vinyl</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vinyl Flooring Demand</td>
<td>3785</td>
<td>2785</td>
<td>3285</td>
<td>4580</td>
<td>5640</td>
</tr>
<tr>
<td>Luxury Vinyl Tile</td>
<td>490</td>
<td>600</td>
<td>1120</td>
<td>1760</td>
<td>2260</td>
</tr>
<tr>
<td>Vinyl Sheet</td>
<td>2250</td>
<td>1320</td>
<td>1105</td>
<td>1450</td>
<td>1745</td>
</tr>
<tr>
<td>Vinyl Composition &amp; Other Tile</td>
<td>1045</td>
<td>865</td>
<td>1060</td>
<td>1370</td>
<td>1635</td>
</tr>
<tr>
<td>- net imports</td>
<td>1025</td>
<td>935</td>
<td>1610</td>
<td>2145</td>
<td>2615</td>
</tr>
<tr>
<td>Vinyl Flooring Shipments</td>
<td>2760</td>
<td>1850</td>
<td>1675</td>
<td>2435</td>
<td>3025</td>
</tr>
<tr>
<td>$/sq ft</td>
<td>0.51</td>
<td>0.65</td>
<td>0.79</td>
<td>0.90</td>
<td>1.02</td>
</tr>
<tr>
<td>Vinyl Flooring Demand (mil $)</td>
<td>1920</td>
<td>1815</td>
<td>2580</td>
<td>4105</td>
<td>5770</td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

STUDY COVERAGE

This Freedonia industry study, Hard Surface Flooring, presents historical demand data for 2004, 2009 and 2014 plus forecasts for 2019 and 2024 by product and market. The study also considers key market environment factors, assesses the industry structure, analyzes company market share and profiles 36 players in the US hard surface flooring industry.
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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. Nonre- silient 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:

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

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.