

Global Flooring Market

Industry Study with Forecasts for 2020 & 2025

Study #3487 | January 2017 | \$6500



The Asia/Pacific region will contribute most of the growth in global demand for floor coverings -- including both hard surface flooring and carpets and rugs -- through 2020, primarily due to increases in the Chinese market but also due to strong growth in countries like the Philippines, India, Pakistan and Indonesia. Developing countries in Asia and the Africa/Mideast region will continue to see the fastest annual gains as personal incomes rise and home and business owners can afford floor coverings instead of relying on traditional unimproved floor surfaces.

China to continue driving worldwide growth

Over one-third of new flooring and carpet demand generated between 2015 and 2020 will be in China. Virtually all flooring and carpet demand in the country is utilized in buildings, which account for 95 percent of flooring usage, so the outlook for building construction is critical. While construction activity in China is forecast to slow significantly through 2020, its growth will still be higher than the global average. The Africa/Mideast region will register the fastest growth through 2020. Increasing demand for urban housing will fuel residential building construction spending and related flooring and carpet sales. Growth in office and commercial construction activity will also contribute to gains.

US leads developed country growth

The US, which is the second largest flooring market in the world, will continue to post gains at about the worldwide average, with growth benefiting from continued strength in the residential market. In contrast, other developed

areas including Western Europe, Japan, and Australia will register meager increases due to sluggish construction sectors.

Flooring preferences vary globally

While nonresilient flooring products represented 62 percent of global floor covering demand in 2015, flooring preferences vary significantly among individual regions and countries. For example, ceramic tile comprised more than half of floor covering demand in the Asia/Pacific region and in Central and South America, while carpets and rugs lead in the large US market.

Residential buildings still dominant

Residential buildings constitute the largest market for floor coverings, accounting for 56 percent of sales in 2015. Nonresidential buildings made up 40 percent of demand, while transportation and other markets represented the remainder. The fastest growth through 2020 is expected in nonresidential building applications.

Study coverage

This Freedonia industry study analyzes the 16.0 billion square meter global floor covering industry. It presents historical demand data plus forecasts (2020 and 2025) by product (nonresilient, resilient, carpets and rugs) and market (residential buildings, nonresidential buildings, transportation equipment and other). The study also analyzes company market share and lists industry players, including Armstrong Flooring, Balta Industries, Ceramica Cleopatra, Interface, Mohawk, Oriental Weavers, Shaw Industries, Tarkett, and TOLI.

CONTENTS SUMMARY

Executive Summary

Market Environment

Overview

- Floor Covering Demand
- Regional Overview
 - Demand
 - Production
 - International Trade
- Demand by Product
 - Nonresilient Flooring
 - Ceramic
 - Wood
 - Laminate
 - Other
 - Resilient Flooring
 - Vinyl
 - Other
 - Carpets & Rugs
 - Tufted
 - Non-Tufted
- Demand by Market
 - Residential Buildings
 - Nonresidential Buildings
 - Transportation Equipment & Other

North America

- Economic Overview
- Flooring & Carpet Supply & Demand
- Flooring & Carpet Demand by Product
- United States
- Canada
- Mexico

Western Europe

- Economic Overview
- Flooring & Carpet Supply & Demand
- Flooring & Carpet Demand by Product
- Germany
- France
- United Kingdom
- Italy
- Spain
- Netherlands
- Belgium
- Other Western Europe
 - Switzerland
 - Sweden
 - Austria
 - Greece
 - Portugal
 - All Other

Asia/Pacific

- Economic Overview
- Flooring & Carpet Supply & Demand
- Flooring & Carpet Demand by Product
- China
- India

- Japan
- Indonesia
- South Korea
- Australia
- Other Asia/Pacific
 - Thailand
 - Philippines
 - Vietnam
 - Taiwan
 - Pakistan
 - All Other

Other Regions

- Central & South America
 - Economic Overview
 - Flooring & Carpet Supply & Demand
 - Flooring & Carpet Demand by Product
 - Brazil
 - Other Central & South America
 - Argentina
 - Colombia
 - All Other
- Eastern Europe
 - Economic Overview
 - Flooring & Carpet Supply & Demand
 - Flooring & Carpet Demand by Product
 - Russia
 - Other Eastern Europe
 - Poland
 - Ukraine
 - All Other
- Africa/Mideast
 - Economic Overview
 - Flooring & Carpet Supply & Demand
 - Flooring & Carpet Demand by Product
 - Turkey
 - Iran
 - Other Africa/Mideast
 - Nigeria
 - Egypt
 - Saudi Arabia
 - All Other

Industry Structure

- Overview of Floor Covering Industry
- Industry Composition
- Market Share
- Product Development & Manufacturing
- Marketing & Distribution
- Cooperative Agreements
- Mergers & Acquisitions
- List of Industry Participants

TABLES & CHARTS

Executive Summary

- 1 Summary Table

Overview

- 1 Global Flooring & Carpet Demand by Region

- Cht Global Flooring & Carpet Demand by Region, 2015
- Cht Change in Flooring & Carpet Demand Between 2015 & 2020 by Region
 - 2 Global Flooring & Carpet Production by Region
- Cht Global Flooring & Carpet Production by Region, 2015
 - 3 Global Flooring & Carpet Net Exports by Region
 - 4 Global Flooring & Carpet Demand by Product
- Cht Global Flooring & Carpet Demand by Product, 2015
 - 5 Global Nonresilient Flooring Demand by Type & Region
 - 6 Global Resilient Flooring Demand by Type & Region
 - 7 Global Carpet & Rug Demand by Type & Region
 - 8 Global Flooring & Carpet Demand by Market
 - 9 Global Residential Flooring & Carpet Demand by Application & Region
 - 10 Global Nonresidential Flooring & Carpet Demand by Application & Region
 - 11 Global Demand for Flooring & Carpet Used in Transportation Equipment & Other Markets by Region

Tables for each region/country:
Flooring & Carpet Supply & Demand
Flooring & Carpet Demand by Product

Charts for each major region/country:
Regional Macroeconomic Outlook by Country, 2015
Regional Flooring & Carpet Demand, 2005-2015
Regional Flooring & Carpet Demand by Country, 2015
Regional Flooring & Carpet Demand by Product, 2005-2025
(Country) Flooring & Carpet Demand, 2005-2015
(Country) Flooring & Carpet Demand by Product, 2005-2025

Industry Structure

- 1 Flooring & Carpet Sales for Selected Manufacturers, 2015
- Cht Global Flooring & Carpet Market Share, 2015
- Cht Global Nonresilient Flooring Market Share, 2015
- Cht Global Resilient Flooring Market Share, 2015
- Cht Global Carpet & Rug Market Share, 2015
 - 2 Selected Cooperative Agreements
 - 3 Selected Acquisitions & Divestitures

OVERVIEW

Ceramic -- Demand for ceramic floor tile is forecast to advance percent per ann construction sp tile accounts fo Technological i resemble natur growth. For in: look of wood fl (such as bathro for easier instal flooring. Howe flooring (such a lower end appli nonresilient flo demand in high

Ceramic tiles are made from a mixture of clay, water, feldspar, tal and other minerals. Floor tiles are available in three principal var ies: glazed, unglazed, and mosaic. Glazed tiles have a ceramic co that is applied to the body for color and finish, and are generally u residential applications, as the high levels of foot traffic typically found in a number of nonresidential settings can erode the glazed surface. Unglazed ceramic tiles have no coating, are very durable, and do not show wear from heavy traffic. As such, these tiles are used frequently in heavy-duty commercial applications. Mosaic ceramic tiles are used to create designs on floors or walls and are used primarily in low traffic settings.

Ceramic tiles have low maintenance requirements, long life, and high resistance to moisture, stains, fading, fire, and scratching. Additionally,

©2017 The Freedonia Group. All rights reserved.

Table 6-3 | China: Flooring & Carpet Supply & Demand (million square meters)

Item	2005	2010	2015	2020	2025
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2014\$)					
\$ building construction/000\$ GDP					
Building Construction Expend (bil 2014\$)					
m ² flooring/capita					
m ² flooring/mil \$ GDP					
m ² flooring/000\$ building construction					
Flooring & Carpet Demand					
Residential Buildings					
Nonresidential Buildings					
Transportation Equipment & Other					
net exports					
Flooring & Carpet Shipments					

Source: The Freedonia Group

Table 5-4 | Germany: Flooring & Carpet Demand by Product (million square meters)

Item	2005	2010	2015	2020	2025
Western Europe Flooring Demand % Germany					
Flooring & Carpet Demand					
Nonresilient Flooring:					
Ceramic					
Laminate					
Wood					
Other					
Resilient Flooring:					
Vinyl					
Other					
Carpets & Rugs:					
Tufted					
Other					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Global Flooring Market

Industry Study with Forecasts for 2020 & 2025

Study #3487
January 2017
\$6500



Related Studies

Molding & Trim in the US

Demand for molding and trim in the US is forecast to rise 1.6 percent per annum through 2020 to \$9.9 billion. Wood will remain the leading material for molding and trim, although competition from plastic and engineered wood will intensify. Interior molding and stairwork will post healthy gains based on rising new housing completions. The study offers historical data plus forecasts for 2020 and 2025 by material, product, market and region of the US. The study also examines the market environment, assesses the industry structure, and analyzes company market share.

#3474..... November 2016 \$5100

World Drywall & Building Plaster

Global demand for drywall is forecast to rise 4.0 percent per year through 2020 to 10.0 billion square meters. Over one-third of new drywall demand generated between 2015 and 2020 will be in China. Worldwide demand for building plaster is projected to rise 3.7 percent yearly to 37.1 million metric tons in 2020. This world study details the 8.2 billion square meter drywall market and the 31 million metric ton building plaster market, with forecasts by market for 2020 and 2025 in 6 regions and 21 countries. The study also assesses the industry structure and evaluates market share.

#3464..... October 2016 \$6300

Decorative Tile

US demand for decorative tile is forecast to increase 3.5 percent annually to 3.1 billion square feet in 2020, valued at \$6.1 billion. Porcelain will be the fastest growing tile material, while ceramic tile remains dominant. Flooring applications will remain dominant and grow the fastest. The residential market will outpace the nonresidential segment. This study analyzes the 2.6 billion square foot US decorative tile market, with forecasts for 2020 and 2025 by product, application, and market. The study also evaluates company market share and profiles industry players.

#3393..... March 2016 \$5200

Hard Surface Flooring

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. The key residential market will post the fastest growth, driven by gains in housing completions and a shift toward hard surface flooring in living and dining areas, where carpet has predominated. This study analyzes the 8.4 billion square foot US hard surface flooring industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry competitors.

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

Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: info@freedoniagroup.com

website: freedoniagroup.com

Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

The Freedonia Group 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

The Freedonia Group is a division of MarketResearch.com

About MarketResearch.com

With offices in London, New York City, and Washington D.C., MarketResearch.com is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, MarketResearch.com offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.



[Click here to purchase study online](#)