

Carpet Flooring Market - Global Outlook & Forecast 2023-2028

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Report description:

The carpet flooring market is expected to grow at a CAGR of approximately 5.74% from 2022 to 2028.

MARKET TRENDS & OPPORTUNITIES

Rise In Renovation And Remodeling Activities

Remodeling activities are one of the major opportunities for vendors in the carpet flooring market. Remodeling means modifying the interiors and exteriors of the existing structure and involves upgradation according to recent trends. It involves alterations, maintenance, repairs, and various additions. Re-innovations make old space interesting, and because of this, people across the world are investing significantly in home renovation and improvement activities.

However, there is less demand for carpet flooring from the renovations and home remodeling homes sector in developing and underdeveloped countries in the regions such as Latin America, Middle East & Africa, and APAC. Therefore, regions such as North America and Europe are anticipated to generate the highest demand for carpet flooring during renovation and home improvement activities. However, improving economies in countries such as India, Brazil, Mexico, and few others in both residential and commercial sectors are expected to create significant potential for the growth of carpet flooring during renovations.

Escalating Demand For Carpet Tiles

Carpet Tiles are modular carpets in square pieces fitted together to make a perfect carpet and are the best alternatives to carpet rolls. They are mostly used in commercial buildings like schools, libraries, corporates, airports, and many more. Carpet tiles are easy to maintain and repair. Installation is also easy and takes less time. People across the globe are inclined towards luxurious interiors, which is expected to increase in demand for carpet tiles in the flooring industry. Consumers across the globe are now becoming increasingly aware of carpet tiles in the carpet flooring market. For consumers, carpet tiles are an ideal carpet flooring solution as they offer easy mobility, less installation cost and are customizable. Wall-to-wall carpets are dominant in the industry as there is a lack of awareness and affordability.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

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The global broadloom carpet flooring market was valued at USD 51 billion in 2022 and dominated the product segment. However, the industry for carpet tiles is expected to witness the highest growth during the forecast period owing to rising demand for modular and innovative designs and eco-friendly carpets. Broadloom Carpets are not easy to recycle and reuse, but carpet tiles can be easily recycled as they are small in pieces. People in low- and middle-income areas have less affordability, so they refrain from choosing carpet tiles. Moreover, shifting towards eco-friendly products has driven demand for carpet tiles in the flooring market.

Segmentation by Product

- Broadloom Carpet
- Carpet Tiles

INSIGHTS BY APPLICATION

The replacement segment dominates the industry, accounting for over 59% of the share. The advent of technology, raw materials, durability, appearance, smoothness, comfort, hardness, fire resistance, and maintenance for remodeling flooring are propelling the demand for replacing carpet flooring.

However, even though replacing carpet flooring currently dominates the global carpet flooring market, demand for replacement is expected to witness a CAGR of around 6% compared to over 5% for new installation. Significantly increasing construction activities, rapid infrastructural development, rising government concern in new buildings, and significantly increasing installment of new carpet tiles are expected to boost the demand for new installation.

Segmentation by Application

- New Installation
- Replacement

INSIGHTS BY DISTRIBUTION CHANNEL

The global offline carpet flooring market was valued at USD 53.88 billion in 2022 and dominated the distribution channel segment. Carpet Floorings are mainly sold through offline distribution channels, such as specialty stores, dealerships and distributors, supermarkets, and hypermarkets. Moreover, the distribution environment is rapidly evolving, with systems and processes being upgraded at a rapid pace. Changes are being spurred by expanding competition, accelerating digitization, constant disintermediation, and consumerization of expectations. B2B commerce is witnessing an increase in expectations largely associated with B2C, such as transparent pricing, communities, and social connections. This is expected to continue further, focusing on lowering costs, improving efficiencies, and opening new opportunities.

Segmentation by Distribution Channel

- Offline
- Online

INSIGHT BY END-USER

The global carpet flooring market has been broadly classified into residential, commercial, and transportation by end-users. Presently the carpet flooring market has been dominated by residential, accounting for around 46-47% share in the industry. The higher industry share is due to the rise in global housing units and growing demand for carpet flooring across various regions. Rising urbanization and growing per capita income have driven demand for architectural projects for building and construction, thereby increasing the demand for carpet flooring in the industry. The growth in population in the APAC region is boosting residential construction, along with new housing projects by the government. The advent of technology, raw materials, durability,

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appearance, smoothness, comfort, and luxury propel the demand for replacement carpet flooring.

Segmentation by End-User

- Residential
- Commercial
 - o□Offices
 - o□Hospitality
 - o□Education
 - o□Sports & Entertainment
 - o□Retail
 - o□Medical & Care Centers
 - o□Other End- Users
- Transportation

GEOGRAPHICAL ANALYSIS

North America accounted for the largest carpet flooring market share of over 35% in 2022. The region holds a significant share of the global industry owing to the huge penetration of commercial and residential sectors and the high disposable income of consumers. By 2050, commercial building floor space is expected to reach 126.1 billion square feet. This, in turn, reflects the huge potential for the growing demand for carpet flooring. Moreover, North America is home to a developed retail sector that witnesses millions of people walking in daily. This creates a requirement for robust, sound-absorbent, slip-resistant flooring, which has driven demand for carpet flooring in North America.

APAC accounted for the second-largest carpet flooring market in 2022, with an industry share of around 27%. The increased demand for housing in the region has resulted in significant expenditures in new and renovated residential infrastructure, which has boosted the entire industry. Furthermore, expanding industrial growth, particularly in China, India, and Japan, expects to boost market value. China is an embellished industry with readily available raw materials, a skilled workforce, and multinational manufacturers. The rise in investments in residential and commercial construction activities in developing countries is projected to fuel the carpet flooring market during the forecast period.

The carpet flooring market in Europe was valued at USD 13.77 billion in 2022. The major factors that provide opportunities for market growth in the region are the growing penetration of prefabricated building manufacturers, significant rising retrofit activities, and the growing demand for housing units from developing countries of the region. Germany accounts for the largest carpet industry in Europe, as major demand for carpet flooring comes from this country.

Segmentation by Geography

- North America
 - o□US
 - o□Canada
- Europe
 - o□Germany
 - o□UK
 - o□France
 - o□Italy
 - o□Spain
- APAC
 - o□China
 - o□Japan

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- o South Korea
- o India
- o Australia
- Latin America
- o Brazil
- o Mexico
- o Rest of Latin America
- Middle East & Africa
- o Saudi Arabia
- o UAE
- o Turkey
- o South Africa

COMPETITIVE LANDSCAPE

The global carpet flooring market is highly competitive, with the presence of many vendors. Rapid technological improvements are adversely impacting market vendors as consumers are expecting continuous innovations and upgrades of products. The present scenario drives vendors to alter and refine their unique value proposition to achieve a strong industry presence. Some major players dominating the carpet flooring market include MOHAWK INDUSTRIES, Interface, Tarkett, The Dixie Group, Victoria, and ORIENTAL WEAVERS.

The presence of diversified global and regional vendors characterizes the industry. As international players would increase their footprint in the market, regional vendors are likely to find it increasingly difficult to compete with global players. The competition will be based solely on features such as quality, quantity, technology, services, and price. The market competition is expected to intensify further with an increase in product/service extensions, technological innovation growth, and mergers and acquisitions. Arizton believes global players would grow inorganically by acquiring regional or local players in future years.

Currently, the global carpet flooring market is dominated by vendors that have an international presence. Many international players are expected to expand their reach worldwide during the forecast period, especially in the fast-developing countries of the APAC region and Latin America, to enhance their industry share. Lately, significant R& D activities have been undertaken by vendors of carpet flooring to have a strong position in the carpet flooring industry and to keep up with the latest trends.

Key Vendors

- Beaulieu International Group (B.I.G.)
- Interface
- MOHAWK INDUSTRIES, INC.
- The Dixie Group
- Tarkett
- ORIENTAL WEAVERS
- Victoria

Other Prominent Vendors

- Axminster Carpets
- Betap
- Brintons Carpets
- Brumark
- Cormar Carpet
- Dorsett Industries
- ege
- Forbo Flooring

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- []Gerflor Group
- []Kane Carpet
- []Mannington Mills
- []Milliken
- []Shaw Industries Group
- []Suminoe Textile Group

KEY QUESTIONS ANSWERED:

How big is the carpet flooring market?

What is the growth rate of the carpet flooring market?

Which region dominates the global carpet flooring market?

What are some of the latest trends that will shape the future of the global carpet flooring market?

Who are the key players in the global carpet flooring market?

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27.10.5 MARKET BY COMMERCIAL SECTOR

28 APPENDIX

28.1 ABBREVIATIONS

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