

Flooring Market - Global Outlook & Forecast 2023-2028

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Report description:

The global flooring market is expected to grow at a CAGR of 5.77% during 2022-2028.

The flooring demand is mainly concentrated in countries such as the US, Japan, China, the UK, Germany, and France. However, developing Asian economies such as India is witnessing increased adoption of flooring products owing to developing industrial or non-residential sector. Further, developing countries are expected to witness the highest CAGR of over 5% in 2030 due to increasing construction and infrastructure activities. China is projected to be the largest contributor to the global flooring market in terms of revenue during the forecast period. Increased investments in residential and commercial construction sectors will drive the demand for flooring products in China.

Further, the growing penetration of prefabricated building manufacturers and the rising disposable income to invest in decorative buildings expect to fuel flooring sales. Moreover, increasing demand for LVT due to the ease of its availability, installation, and durability in a cost-effective manner, especially in the residential sector, is expected to drive the LVT market growth. Thus, during the forecast period, LVT flooring is expected to be a vital part of the flooring in the market.

MARKET TRENDS & OPPORTUNITIES

High Demand for Luxury Vinyl Tiles

Luxury vinyl tiles are one of the most preferred flooring materials as they are the most durable and high-quality, with low maintenance at affordable prices. With factors such as stains, scratches, mildew, or mold, LVT is highly preferred in entry zones and heavy traffic areas. Luxury vinyl is available in a wooden look form with a soft underfoot feeling, available in a tile and plank form. LVT is mainly preferred for bedrooms, fancy areas, and living rooms of residence for a perfect finishing and classy look. Hence, the residential sector is expected to create considerable demand for the LVT flooring industry during the forecast period. Moreover, the cost of LVT is low compared to carpet and hardwood floors in the market.

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Emerging New Technologies In Flooring Market

With the advent of modernization, the flooring industry is adapting emerging technologies in the market. Many companies are focusing on manufacturing engineered wood flooring products in the industry. Engineered wood flooring is one of the classic, timeless, modern floor coverings with improved material quality. Technology and manufacturing advancements have helped manufacturers create technologically superior and modified versions of hardwood flooring or engineered wood floors. With dimensional stability and superior moisture resistance features, engineered wood flooring is highly preferred for residential and commercial flooring. Some benefits of engineered wood flooring include a wide range of design and color options, easy to install and durable, and budget-friendly.

INDUSTRY RESTRAINTS

Lack of Skilled Labor

Most global building constructors, associations, and construction firms estimate that the lack of skilled labor will significantly impact construction activities' productivity during the forecast period. Construction firms are looking for ways to cope with the skilled labor shortage. Such factors challenge the global construction industry, restraining the flooring market growth. Various laborers being deployed in flooring work at construction sites lack skills for carrying out their job. However, in most growing economies, flooring contractors provide dedicated training for employers in handling chemicals used for flooring and equipment used for flooring tiles applications.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global non-resilient flooring market dominated the market and was valued at USD 243.22 billion in 2022. Growing urbanization and improving ruralization have increased the demand for carpet and ceramic flooring or non-resilient flooring in the market. This type of flooring is highly preferred for residential construction or remodeling houses. Apart from residential, many commercial spaces prefer non-resilient flooring, mainly carpet, which is highly observed in the hotel industry where flooring appearance mainly attracts customers with a soft- appearance.

Apart from non-resilient flooring, the demand for resilient flooring is also anticipated to witness significant growth during the forecast period. Increasing infrastructural activities such as growing demand for single housing or residents, increasing construction of commercial buildings in developing nations, and rising shift towards urban areas fuel the resilient flooring market.

Segmentation by Product

- Non-Resilient Flooring
 - o□Wood & Laminate
 - o□Ceramic Tiles
 - o□Carpet
 - o□Others
- Resilient Flooring
 - o□LVT
 - o□Linoleum
 - o□Vinyl Sheets

INSIGHT BY APPLICATION

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The global flooring market has been broadly classified into new construction and replacement by application and in 2022 replacement segment dominated the industry accounting for almost 60.29% share. The advent of technology, raw materials, durability, appearance, smoothness, comfort, hardness, fire resistance, and maintenance for remodeling flooring are propelling the demand for replacement flooring. During replacement or remodeling, flooring can be improved with higher safety and accessibility. Thus, various modifications are done for remodeling or replacement at home for better accessibility throughout the floor. Most durable flooring tiles such as LVT, vinyl plank, laminate, engineered wood, ceramic, and rubber are highly preferred for remodeling or replacement of flooring in the industry.

However, even though the replacement flooring market currently dominates the industry, the demand for new construction is expected to witness a CAGR of almost 5.37%. Significantly increasing construction activities, rapid infrastructural development, rising government concern in new buildings, and significantly increasing installment of new tiles are boosting the demand for flooring for new construction.

Segmentation by Application

- Replacement
- New Construction

INSIGHT BY DISTRIBUTION CHANNEL

The global flooring market was dominated by offline distribution channels holding almost 62.82% share. The segment is highly distributed through B2B brick-and-mortar stores such as hypermarkets, and supermarkets, among others. However, due to the recent trend of online channels and the after-effects of the COVID-19 pandemic, online channels have gained significant traction in the last couple of years. Moreover, online sales also provide a wide variety of options for buyers and offer convenience for end-user customers to buy products of their choice from any place at any particular point in time. Although major players in the industry consist of their websites and portals for selling flooring products, they tend to differentiate their offerings in terms of product characteristics and other relevant features. Some vendors have established relationships with e-retailers to sell their range of products at a specified price while maintaining customer relations.

Segmentation by Distribution Channel

- Offline
- Online

INSIGHT BY END-USER

The global flooring market was dominated by residential end-users, accounting for over 55% share in the segment. This higher share can be majorly attributed to the rise in the global base of housing units and the growing demand for modern flooring across various regions. Rising urbanization and growing per capita income have driven the demand for architectural projects for building and construction, thereby increasing the demand for flooring. Further, the rising demand for flooring due to new construction, renovations, and replacements will be a major growth driver for the residential flooring industry. Furthermore, urbanization in emerging countries and new housing and home remodeling activities have boosted market growth.

The non-residential market expects to create over USD 230 billion in revenue by 2028 in the global flooring market, owing to the growing need for commercial infrastructure worldwide and an increase in demand for new construction in the commercial sector. With ease of maintenance, high durability, comfort, and low-cost, waterproof flooring materials have improved their attractiveness in the non-residential sector. For these reasons, the non-residential industry has experienced a surge in the usage of flooring products in educational institutions, hospitals, healthcare, and others to fulfill the aesthetic and durability criteria of flooring.

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Segmentation by End-User

- Residential
- Non-Residential
- o□Medical & Care Centers
- o□Retail Stores
- o□Education Facilities
- o□Hospitality & Lodging
- o□Offices
- o□Sports & Entertainment
- o□Others

GEOGRAPHICAL ANALYSIS

APAC dominated the global flooring market, accounting for a 46.82% share in 2022. China, India, and Japan are the largest contributors to the region's industry. In addition, APAC expects to witness one of the fastest growths, with a CAGR of 5.70% during the forecast period. The growth of the flooring market in the APAC region is driven by foreign investments and a booming manufacturing sector due to low labor costs and easily accessible raw materials. In addition, the growing middle-class population and the rising living standards in the region will increase the demand for architectural coatings, which, in turn, drives the flooring market. Apart from this, environmental concerns and health and safety issues are driving the region's water-based flooring market.

North America accounts for a significant share of the global flooring market owing to the huge penetration of non-residential and residential sectors and the high disposable income of consumers. The industry in the US is extremely integrated, with a significant number of start-up companies. High modernization, improved infrastructure, customer acceptability, and high consumer spending drive the region's market. Furthermore, the growing demand for flooring in the region is driven by the increasing need to repair and renovate old structure buildings.

The flooring market in Europe was valued at USD 58.78 billion in 2022. The major factors that provide opportunities for industry 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. Further, growing construction activities are expected to fuel the market's demand for floor sealers and finishers.

Segmentation by Geography

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

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- o Australia
- Latin America
- o Brazil
- o Mexico
- o Argentina
- Middle East & Africa
- o South Africa
- o Saudi Arabia
- o UAE
- o Turkey

COMPETITIVE LANDSCAPE

The global flooring market is highly fragmented, with several top vendors operating. However, the industry is witnessing consolidation, albeit at a slow pace. Over the past couple of years, the industry has witnessed the entry of many external players with new product innovation, quality, price, service, and technology to drive up their share in the flooring market. Further, mergers and acquisitions are common within the industry as players look to expand and become more comprehensive in their offerings. This trend is witnessed among vendors in a landscape where new business models and focus on developing the portfolio of their establishments are expected to drive growth.

Some of the key leading vendors in the global flooring market are MOHAWK INDUSTRIES, BERKSHIRE HATHAWAY (Shaw Industries), Tarkett, Beaulieu International Group (B.I.G), Interface, and more. The rapidly changing technological environment could adversely affect vendors as customers expect continual innovations and upgrades in flooring. The present scenario forces vendors to alter and refine their unique value proposition to achieve a strong industry presence. Many international players are expected to expand their business globally during the forecast period, especially in the fast-developing APAC and Latin American countries. In addition, improving global economic conditions would fuel the overall market's growth, making it an attractive time for vendors to launch new units. The leading vendors can expect an intensely competitive environment during the forecast period because of the increased demand for infrastructural development in the commercial sector.

Key Company Profiles

- Mohawk Industries, Inc.
- Forbo Flooring
- Beaulieu International Group (B.I.G.)
- Grupo Lamosa
- LL Flooring Holdings
- RAK Ceramics
- Tarkett
- Shaw Industries Group (Berkshire Hathaway)
- Interface
- Victoria

Other Prominent Vendors

- Burke Flooring (Mannington Commercial, Mannington Mills)
- Gerflor Group
- Pamesa Ceramica Compactto
- AHF
- Kajaria Ceramics

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- Portobello
- Polyflor
- Crossville
- PORCELANOSA Grupo
- SCG Ceramics
- Congoleum
- Dixie Group
- Brumark
- Dorsett Industries
- Milliken
- Oriental Weavers
- Axminster Carpets
- Brintons Carpets
- Betap

KEY QUESTIONS ANSWERED

- How big is the flooring market?
- What is the growth rate of the flooring market?
- Which region dominates the global flooring market?
- Who are the key players in the global flooring market?
- What are the key driving factors in the flooring market?

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