

Saudi Arabia Floor Covering - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Saudi Arabia Floor Covering Market Analysis

The Saudi Arabia floor covering market currently stands at USD 291.04 million in 2025 and is projected to reach USD 408.20 million by 2030, translating into a 7.0% CAGR over the period. Robust public-sector spending tied to Vision 2030, a housing supply gap exceeding 115,000 units a year, and the Kingdom's tourism build-out are the core catalysts. Local manufacturers are leveraging tariff advantages and land subsidies to protect their share, while global players deploy joint-venture plants to serve large commercial projects. Demand is tilting toward cool-surface ceramics in hot inland provinces and toward hybrid luxury vinyl in coastal markets where humidity drives product choice. Rising mortgage penetration, a widening adoption of omnichannel retail, and new SASO low-VOC rules are pushing suppliers to accelerate product innovation and distribution redesign.

Saudi Arabia Floor Covering Market Trends and Insights

Vision 2030 Megaproject Pipeline Boosting New-Build Flooring Demand

Saudi construction awards totaled SAR 672 billion from 2021-2023, with 68% tied to just 15 flagship projects. New Murabba, Diriyah Gate, and King Salman Park alone require multi-format premium flooring across commercial, residential, and civic blocks. A SAR 43 billion public housing plan covering 240,000 units further deepens volume visibility. International EPCs are partnering with local installers to overcome capacity bottlenecks, and lead times for ceramic tile supply have shortened from 14 to 8 weeks as domestic kilns add shifts. Flooring bidders that can certify SASO low-VOC compliance gain preferential scoring in state tenders .

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Growing Premium and Luxury Residential Renovation in Riyadh and Jeddah

Legal reforms expected to widen foreign property ownership are spurring developers to pre-specify imported hardwood and patterned marble for penthouses and branded villas. Mortgage refinancing by the Saudi Real Estate Refinance Company reached SAR 20 billion, injecting liquidity into home-upgrade budgets. In established Riyadh districts, renovation spending per household rose 9% in 2024 as owners replaced basic ceramic with wide-plank LVT featuring integrated acoustic backing. Showroom footfall for engineered wood has doubled year-on-year, signaling a shift toward aspirational finishes despite climate constraints .

Oil-Revenue Cyclicity Impacting Private Construction Spend

Although government megaprojects enjoy ring-fenced budgets, private residential and retail developers recalibrate procurement when Brent prices dip below USD 75/bbl. Flooring distributors saw a 12% sales contraction during the 2024 Q2 oil price soft patch as projects deferred interior finishes. Cash-flow uncertainty prompts mid-market buyers to downgrade from oak to SPC (stone-plastic composite) planks to save 18% on installed cost, compressing supplier margins.

Other drivers and restraints analyzed in the detailed report include:

Tourism and Hospitality Expansion Driving Hotel Flooring Upgrades / Preference for Soft Floor Coverings in Majlis and Prayer Areas
Fueling Carpet Sales / Harsh Desert Climate Shortening Product Lifecycles /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Ceramic and porcelain tiles generated 56.75% of the Saudi Arabia floor covering market in 2024. Their high-density shields against sand abrasion provide passive cooling, making them the default for public buildings in Riyadh. Saudi Ceramic Company's expanded kiln in Dammam now outputs 36 million m² annually, reinforcing local supply reliability. Luxury vinyl tiles are tracking a 12.56% CAGR that positions them as the standout challenger through 2030. Design-printed wear layers allow marble visuals at one-third the installed cost, widening appeal among mid-income homeowners. Innovations such as click-lock SPC cores with sound-abating pads shorten installation cycles by 40%, a compelling proposition for hotel refurbishments on compressed schedules.

Domestic producers are integrating solution-dyed nylon to improve fade resistance, a response to customer complaints of color shift under the desert sun. Non-resilient natural stone and solid wood corners the ultra-luxury niche but face 12-20% import duties and moisture management challenges. Rubber and homogeneous vinyl sheets dominate healthcare corridors where hygiene trumps aesthetics, supported by ISO-class clean-room certifications. Early-stage pilot batches of graphene-enhanced vinyl from a Jeddah start-up hint at a materials science step-change aimed at boosting tensile strength by 30% while cutting plank thickness.

The Saudi Arabia Floor Covering Market Segments Into by Product Type (Carpet and Rugs, Resilient Flooring, and More), End-Use Sector (Residential, Commercial, Industrial, and Logistics Facilities), Distribution Channel (Specialty Flooring Stores, Home-Improvement Centers, and More), Cities (Riyadh, Jeddah, and Others). The Market Forecasts are Provided in Terms of Value (USD)

List of Companies Covered in this Report:

Al Sorayai Group / Al Abdullatif Industrial Investment Co. / Saudi Ceramic Company / Tarkett Middle East LLC / Mohawk Industries

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Inc. / Gerflor Group / Interface Inc. / Shaw Industries Group / Forbo Flooring Systems / LG Hausys Middle East / Milliken & Company / Beaulieu International Group / Al Yamamah Carpet Factory / Balta Group / Armstrong Flooring / Rak Ceramics PJSC / Swiss-krono Group / BFG Saudi* /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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