

# Commercial Flooring: North American Markets

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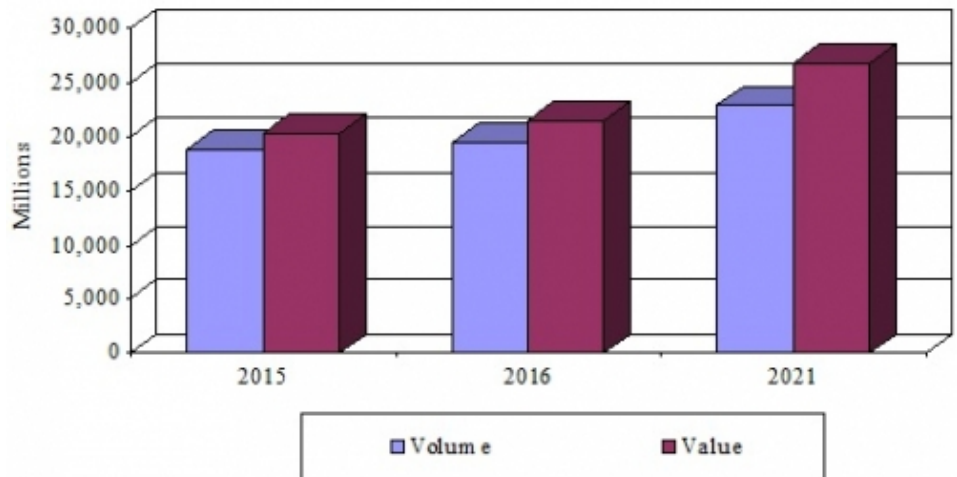
- Provide a broad understanding of the flooring market to business planners, investors and other professionals with quantifiable market measurements, as well as the markets for adjacent but complementary products and technologies.
- Analyze the market in terms of key product and technology areas, major manufacturers and factors influencing market growth.
- Formulate strategic business plans, to make key investment decisions and a more comprehensive analysis of the overall market and growth opportunities for companies operating in the flooring market.
- Discuss major stakeholders, product portfolios and recent developments, and to draw a competitive landscape for the market leaders in the flooring market.




# Highlights

- The North American commercial flooring industry is expected to reach \$26.8 billion by 2021 from \$21.5 billion in 2016, rising at a compound annual growth rate (CAGR) of 4.5% from 2016 through 2021 in terms of revenue.
- The West region of North American commercial flooring industry is the largest market. The market is expected to grow from \$6.8 billion in 2016 to \$8.6 billion in 2021 at a CAGR of 4.7% for the period 2016-2021.
- The Southeast region of North American commercial flooring industry is expected to grow from \$4.6 billion in 2016 to \$6.0 billion in 2021 at a CAGR of 5.4% for the period 2016-2021.

SUMMARY FIGURE  
NORTH AMERICAN FLOORING MARKET, 2015-2021  
(MILLIONS OF SQUARES/\$ MILLIONS)



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Source: BCC Research

## Introduction & Scope

### INTRODUCTION

#### STUDY GOALS AND OBJECTIVES

The objective of this report is to provide business planners, investors and other professionals with quantifiable market measurements and analyses that can help them formulate strategic business plans and make key investment decisions.

#### REASONS FOR DOING THE STUDY

The commercial flooring market is a \$20.4 billion industry in North America that defines the livelihood of nearly 6,300 commercial flooring contractors, and almost 73,000 manufacturing employees who produce flooring products, as well as the distributors that carry these products. Although the industry was hit hard by the economic downturn of the last decade, the flooring industry remains a vital part of the economy and is projected to continue a healthy growth trend throughout the remainder of the second decade of the 21st century.

This BCC Research study is a comprehensive reference work that defines and describes the commercial flooring industry. In preparation of this document, we have read, analyzed and condensed information from industry sources, trade literature, producer and distributor websites, and other reference material. The industry is diverse, highly creative and dynamic. The range of products currently on the market is very broad, far exceeding the ability of any sole distributor to stock, and wider than most industry observers may realize. Many smaller producers today have the capability of growing

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into major brands tomorrow. Some of these future success stories will ride the wave of demand for new and innovative products, such as light transmissive carpeting and realistically simulated stone and wood surface laminates that are increasingly shaking up the status quo among mainstream commercial flooring alternatives.

## **SCOPE OF REPORT**

This report includes a comprehensive analysis of all commercial flooring products used in the North American commercial flooring market. The report provides the latest information regarding product developments and material and technology enhancements as well as a detailed look at the various distribution channels and their dynamics. The current market demand for each product type is quantified by volume and value, with projections for growth to 2021. This report also provides profiles for leading North American commercial flooring manufacturers. The report is divided into seven chapters:

1. Introduction
2. Summary
3. Overview
4. Commercial Flooring Products
5. Market Size & Growth
6. Market Definition
7. Company Profiles

## **GEOGRAPHIC SCOPE**

The analysis provided in this report is regional and includes information for the North American commercial flooring market, including Canada and the U.S.

## **LIMITATIONS**

The numerical data contained in this report are based on market conditions and industry expert opinions available during the time the research was performed. Any reliance placed on this report will reflect those circumstances. Market conditions and circumstances will change over time; therefore, the reader should not always rely on the correctness or relevance of the report.

Actual and projected volumes in emerging applications are estimated through market research and discussion with industry experts. Applications that are well established tend to provide the most accurate estimates.

Base-year reporting for this report is 2015. Data presented in tables are rounded to the nearest million for market volumes, and the nearest million for market values. Roofing volume is measured in squares. Each square equals one sq. ft. All estimated values and forecasts are stated in 2015 dollars, with no consideration of inflation.

In the description and evaluation of market size contained in this report, it is important to note that as various flooring product types are analyzed, the resulting data include materials only and does not (unless otherwise specified) include accessories, systems, labor or installation.

## **INTENDED AUDIENCE**

This report is intended to provide necessary background and reference material for individuals involved in, or potentially interested in, the North American commercial flooring industry. These include individuals and organizations involved in the development, formulation, manufacture, sale and use of flooring products, and related and ancillary businesses such as raw material suppliers, consultants, distributors, contractors and builders. BCC Research feels that this report will be of great value to technical and business personnel in the following areas, among others:

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- Marketing and management personnel in companies that produce, market and sell flooring products.
- Companies involved in the design and construction of plants that manufacture flooring materials and those who service these plants.
- Financial institutions supplying money for such facilities, including banks, merchant bankers, venture capitalists and others.
- Personnel in related industries, such as real estate development, architecture, interior design, community planning, oil and gas refining and processing, polymer processing, plastic molding, composite processing and molding, and others.
- Personnel in government, primarily building inspectors, but also state and local health, environmental and other regulators, who must implement and enforce laws covering construction and building quality.

## **METHODOLOGY AND INFORMATION SOURCES**

Both primary and secondary research methodologies were used in preparing this study. Extensive searches were made of the literature and the Internet, including many of the leading flooring trade publications, trade and industry associations, business publications, industry blogs, flooring data compilation companies and others. Product information was obtained directly from the producing company. Market information was derived from various articles, trade publications, and interviews with knowledgeable parties, and government sources. Information for corporate profiles was obtained primarily from the companies, especially larger, publicly owned firms. Other sources included directories, articles and Internet sites.

## **ANALYST'S CREDENTIALS**

The author has completed numerous general industry reports and proprietary studies on the North American building products industry, including residential roofing, commercial roofing, building science, insulation, siding and trim, walls and ceilings, windows, composite decking and other segments.

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