



## Ceramic Tile And Stone Consultants, Inc.

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### **ABSTRACT FOR THE CATALINA REPORT ON THE FLOOR COVERINGS INDUSTRY**

#### **SUMMARY OF MAJOR FINDINGS**

U.S. floor coverings sales are estimated to increase by 3.0% in dollars and 2.3% in square feet during 2010. This would be the first increase in industry sales since 2006. The rebound is being driven by the upturn in existing home sales, which has stimulated the residential replacement market. The builder market may not begin to recover until early 2011 based on permit trends, and the nonresidential market could remain in recession mode for another year or two. The consumer also remains value conscious since unemployment rates are stubbornly high. This has driven consumer purchases to lower priced products, and to home centers and other value retailers. The trend to lower priced products have moderated carpet's declining market share. Consumers have also increased their preference for resilient flooring and lower-end ceramic, wood, and laminate flooring. In fact, the strongest growing flooring market over the recession has been consumer resilient flooring replacement sales.

#### **FLOORING SECTOR TRENDS**

Catalina Research uncovered these trends in our in-depth 286-page report on the U.S. floor coverings industry. U.S. shipments, exports, imports, and price trends are evaluated for carpet and area rugs, wood flooring, ceramic tile, vinyl sheet and floor tile, rubber sheet and floor tile, other resilient flooring, laminate flooring, and stone flooring.

#### **PROFIT MARGINS AND THE COMPETITIVE ENVIRONMENT**

In addition, Catalina Research investigated the cost structure and profit margins of U.S. floor coverings plants. Data trends are compiled for material, labor, and capital inputs. As part of this analysis, Catalina Research profiled 15 leading U.S. manufacturers, compiled company sales and profit margins, and calculated market share. Company profiles cover product lines, manufacturing and distribution, capital investments, acquisitions, and new products.

#### **END-USE MARKET ANALYSIS**

Our end-use market analysis segments residential, commercial and other nonresidential, and transportation equipment markets. Construction markets are further segmented into new and replacement purchases, and purchases by manufactured housing manufacturers. End-use market trends are correlated with U.S. housing demand, nonresidential construction, mortgage interest rates, and other economic indicators to uncover the factors affecting U.S. floor coverings demand, and provide insights into the direction of domestic demand in 2010 and beyond. Residential and commercial carpet shipments are also provided.

#### **DISTRIBUTION CHANNELS AND DEMOGRAPHICS**

Sales are analyzed for retail and wholesale distribution channels. Retail floor coverings sales are supplied for specialty floor coverings stores, home centers, hard surface flooring and other building material dealers, furniture stores, department stores and mass merchandisers, paint and wallpaper stores, direct/internet, and other retailers. The total number of retail outlets selling floor coverings and total floor coverings sales by region and state are provided as well. Based on this data, Catalina Research calculated per capita sales. The report also includes a regional and state analysis of floor coverings sales by retail outlet and flooring type, as well as sales to households, builders, businesses, and governments. In addition, Catalina provides sales estimates for the leading specialty floor coverings retailers and flooring distributors. A separate section investigates the demographics of household floor coverings purchases. Household spending trends are studied by family income, age of household head, persons per household, and region. Spending demographics are segmented for carpet, area rugs, and hard surface flooring. Spending trends are provided for homeowners and renters, and for DIY/BIY and contractor jobs. The number of residential replacement jobs is also included.

9/14/2010

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**Forensic Failure Investigations ■ Expert Witness ■ Quality Control ■ Testing ■ Training**

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**INSTALLATION CONTRACTOR MARKET**

A separate section analyzes the installation market. Data trends are provided for the number and revenues of U.S. floor coverings installation contractors, revenues by type of job and building, material and labor costs, revenue per square foot of floor coverings installed, and regional and state data. Installation costs are evaluated to consider their impact on the different types of floor coverings sales.

**Report Number: CR066      Date published: July 2010      Pages: 286**  
**Price: \$3,495.00 hard copy or e-mail version**

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