

# Carpets and Floorcoverings - UK - January 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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“At last retailers are trying to escape from always relying on discounting to generate interest and are shifting their emphasis to home-making and style. This comes at a time when the market has gained momentum, with new energy because of stronger consumer confidence and a pick-up in the housing market.”

Jane Westgarth, Senior Market Analyst

This report looks at the following areas:

- How can retailers move away from the focus on discounting and create more added value?
- When people buy flooring and carpets how much does service matter?
- Are people buying as part of a whole room makeover?

## What you need to know

After several years of weak demand, consumer spending on carpets and floorcoverings has revived, stimulated by a more buoyant housing market. Retailers, which had struggled to make any gains in sales, have seen an uptick in sales volumes because of this. But, the carpet market has been changing fast and there has been a swing away from wool to synthetics with a corresponding fall in typical prices charged. Plus, the long-term trend towards smooth flooring means that wood, laminates, tiles and vinyl all compete for attention against fitted carpets, yet favour demand for loose carpets and rugs.

## Products covered in this report

This report profiles the retail market for two distinct sectors, namely carpets and other floorcoverings. Carpets are the traditional method of floorcovering for the UK residential market. Fitted carpets dominate the sector, although it also includes loose rugs. Other floorcoverings, known as smooths, comprise a disparate group of other products made from a variety of materials. The range of products covered in this report includes:

## Carpets and rugs

- woven carpets including wool or wool/synthetic mix, synthetic fibres (including polypropylene, nylon)
- tufted carpets – manufactured by punching the fibre into a jute or synthetic backing that is then kept in place by use of an adhesive
- fibre-bonded carpets – made by meshing together a blend of fibres to form a web that is treated by heat or resin impregnation
- carpet tiles – may be fibre-bonded, fusion-bonded or tufted
- non-fixed textile floorcoverings – include loose carpets and rugs but excluding doormats, bath and toilet pedestal mats
- underlay
- vinyl/vinyl tiles – cushion vinyl sheet, which is offered both with and without a cushioned underlay, vinyl tile
- wood
- laminate – including those manufactured from resin-impregnated paper that is sandwiched together by either direct or high-pressure methods
- ceramic tiles
- other smooth flooring – includes linoleum, cork, stone.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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### Smooth flooring

The report concentrates on the UK consumer (residential) market for carpets and other floorcoverings, although it recognises the importance of the contract market to the wellbeing of many manufacturers. This is particularly the case in the market for smooth floorcoverings, where a smaller proportion of output has traditionally gone through domestic sales.

Underlay is included in the market definitions in this report, although has been excluded in the past. Carpet fitting costs are also covered.

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The facts  
The implications  
When people buy flooring and carpets how much does service matter?  
The facts  
The implications  
Are people buying as part of a whole room makeover?  
The facts  
The implications

## The Market – What You Need to Know

17.5% growth by 2020 forecast for carpets and floorcoverings  
Average transactions will fall  
People refit 2-4 years after moving  
Private renters swell demand for rugs  
25% have healthy finances  
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Topps Tiles committed to innovation

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Tapi differentiates

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Fitted carpets are the most popular purchase

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Significant opportunity for growth for multiples

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