

ABSTRACT FOR THE CATALINA REPORT ON FLOOR COVERINGS MARKETS AND DISTRIBUTION CHANNELS BY REGION AND STATE

SUMMARY OF MAJOR FINDINGS

The South Atlantic and Pacific regions are the most important U.S. floor coverings geographic markets. Growth, however, was sharpest in the Middle Atlantic and East South Central regions between 2017 and 2019. Our analysis indicates the South Atlantic and East South Central markets have performed the best during 2020. Sales in these markets benefited from rising demand in Florida and Alabama. Meanwhile, California is the most important state market with installed floor coverings spending estimated to be \$8.5 billion during 2020. Texas, Florida, and New York round out the top four state markets. During 2020, growth seems to be stronger in less-densely populated state markets. On the other hand, builder markets are most significant in Florida and Texas as population moves to these low-tax states. Overall retail sales reflect current market conditions, however, sales by channel and the product-mix varies by region and state. For example, states with the highest dependence on the home center channel include Michigan, Mississippi, New Hampshire, North Carolina, and Rhode Island. Meanwhile, retailers in the West South Central, Mountain, and Pacific regions depend most heavily on carpet and area rug sales. Distributor sales are concentrated in Georgia, California, Texas, Florida, and New Jersey. Installation contractor revenues are relatively high in the South Atlantic region since this region has an above average dependence on the builder market. On the other hand, Pacific region installation contractors benefit from the relatively low spending on do-it-yourself projects flooring by households in this region.

FLOOR COVERINGS INSTALLED SPENDING BY REGION AND STATE

Catalina Research has uncovered these trends in our in-depth report on the U.S. floor coverings market by region and state. This pertinent Catalina Floor Coverings Report provides an in-depth look at demand on a region and state basis since sales are influenced by local preferences and drivers of demand. Catalina starts with the national data in the Catalina Report on Floor Coverings Distribution Channels and segments the data by region and state for installed spending by end-use market and distribution channel. Catalina also uncovers opportunities by region and state for floor coverings installation contractors.

END-USE MARKET ANALYSIS BY REGION AND STATE

Separate sections analyzing floor coverings spending trends for residential replacement, builder, and commercial markets by region and state. Each section provides a growth analysis to uncover growing sales opportunities. Catalina analyzed drivers of demand, such as personal income, residential building permits, and nonresidential construction spending to determine the geographic areas that outperformed the national market during this pandemic recession year.

RETAIL DISTRIBUTION CHANNELS BY REGION AND STATE

Total retail sales are provided by region and state. Retail sales are also segmented by channel and product by region and state. Geographic area sales are provided for specialty floor coverings retailers, home centers, hard surface flooring and other building material dealers, and other retailers. Sales are also segmented for carpet and area rugs, ceramic and stone tile, wood and laminate flooring, and LVT and other resilient flooring by region and state. A growth analysis for these trends include per capita retail sales.

DISTRIBUTOR AND INSTALLATION CONTRACTOR BUSINESSES BY REGION AND STATE

The report also analyzes the distributor and installation contractor businesses by region and state. Separate sections on each business provides revenues, number of businesses, and revenues per business by region and state. A growth analysis is provided as well.

Report Number: FC107

Price: \$3,895.00

Date published: October 2020

Pages: 9 summary pages, 29 data tables

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