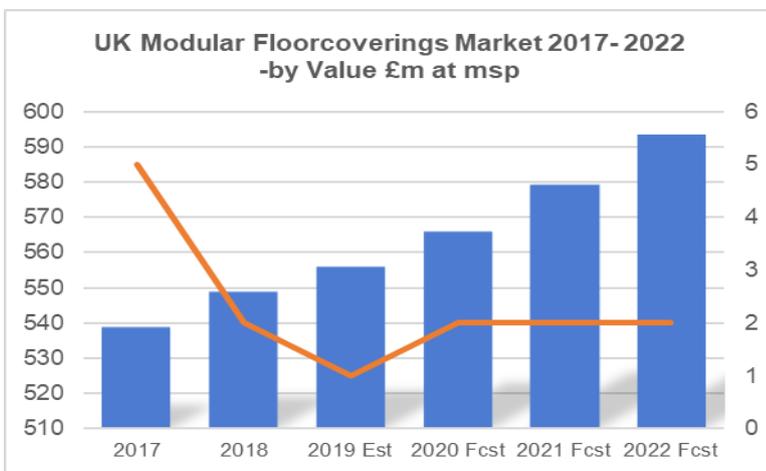




**Press Release**

**February 2020 – Cheltenham, UK**

**Sustainability, recyclability and modularity combine to indicate medium-term growth prospects for flooring**



Interior design trends, sustainability and recycling are the key drivers that have seen the value of the UK modular floorcoverings market increase by 18% between 2014-19 according to a new report by AMA Research. However, the growth rates in 2018-19 have been modest as both consumer and business confidence levels have been eroded by the uncertainties created in the wider economy by the ongoing Brexit saga.

Encompassing carpet tile, vinyl tile, floor tiles (including ceramic, porcelain and natural stone tiles) and other niche products, the market for modular flooring products is highly competitive and increasingly price sensitive.

Modular flooring is utilised in both the domestic and contract end-use sectors, with the contract sector holding the largest share estimated at around 64% in 2018-19. The trend for integrating different flooring materials within a single installation has also driven uptake of modular products. However, the contract sector can be subject to specification switch, particularly when costs begin to spiral at the fitting out stage of projects. Where this happens, this does negatively impact value. Within the domestic sector, increased focus on LVT and porcelain floor tiles has continued to add value.

*"Design trends continue to impact on the type of modular flooring being used. Flooring can be used to make an impression, wayfinding and help direct flow of people, define work-space areas and contribute to sound improvement for quiet spaces"* comments Jane Tarver, Senior Market Research Analyst at AMA Research. *"Improving health and happiness through design is becoming increasingly important in the workplace as well as the home and other areas such as healthcare, leisure, education and public sector facilities. This trend has seen modular floorcoverings products being used to provide a greater degree of comfort as well as to provide different design patterns for different areas"*.

Sustainability and environmental considerations are increasing in significance both throughout the production process and in the end-to-end lifetime of the products. Consideration is increasingly being given to energy use during manufacture and distribution as well as to emissions, raw materials, recycled content and the options for environmentally friendly disposal or reuse. Indeed, recyclability is now seen as a pre-requisite and taken as a given in the market.

The UK modular floorcoverings market is forecast to experience growth to 2023, reaching an estimated £600m+ at MSP. Whilst conditions are expected to be more challenging in the short term, annual growth rates are forecast to improve across the review period.

Jane Tarver continued *"The uncertainties due to the Brexit negotiations creates positive and negative influences for the market as construction in key sectors such as offices are likely to be negatively impacted, but this may lead to increased refurbishments. The private sector will remain the key sector, since the reluctance/inability of many public sector operators to undertake large-scale construction projects is expected to result in higher levels of RMI work in order to improve existing facilities.*

In terms of the supply structure, UK based manufacturers remain under pressure and this is likely to continue as the UK begins to withdraw from Europe. This is likely to see further corporate activity, particularly given the recent trend for consolidation and the development of larger floorcoverings specialists.

The '**Modular Floorcoverings Market Report – UK 2020-2023**' report is published by AMA Research, a leading provider of market research and consultancy services with 30 years' experience within the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

**Editors Note:**

If you would like to receive more information on the report, or would like to speak to the author, then please contact Roshni Patel or Jane Tarver on 01242 235724.

Please include our web address and telephone number on any review printed, and it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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