



The Commercial FLOORING REPORT

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For the Commercial Carpet Industry

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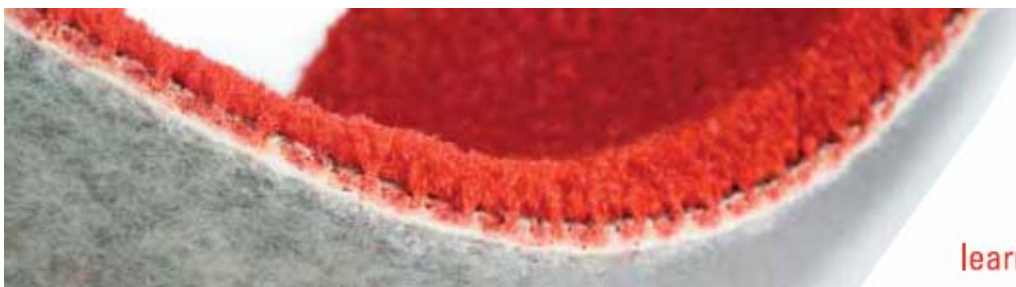
State of the Industry

There are significant advances in the commercial flooring market which impact everyone involved with the product. There have been so many changes in face fiber, backing materials styling, recycling and “Green Issues,” that it’s difficult for the most ardent observer to keep it all in order. This is a brief commentary and a simplistic representation of what’s going on in each of the following categories and how it impacts the product.

Face Fibers and Treatments

There have been significant advances and changes in face fiber. The two most notable are the introduction of what can be said to be polyester/nylon blended technology in Corterra—used by Shaw and Sorona – used by Mohawk. The advancement resulting from these “new” fibers is a combination of the high performance and resilient characteristics of nylon with the inherent stain resistance of polyester. This has put these products firmly into the Apartment market because of their ability to resist staining. Carpets with this fiber initially cost more but the carpet will maintain a better appearance with regular cleaning as they are very difficult to stain. This factor increases the life of the carpet so they can actually be amortized over a longer period of time. These fibers will certainly make their way into more commercial products because they benefit performance and increase

maintenance results. Nylon is the most resilient of carpet fibers. Polyester is difficult to dye therefore it is difficult to stain. Marrying these two characteristics together results in a very unique fiber. From there any application in commercial carpet is just as viable with these fibers as it is with any other synthetic fiber used in the industry. An extended life side to this model is that a commercial carpet, with a planned maintenance program, can be made to last longer keeping it out of the landfill longer and adding more value to the product. There are many more treatments now available on commercial carpet for soil and stain resistance that have higher performance and longer life. Stain resistance has increased in importance on commercial carpet, as has soil retardency, because they both aid in keeping the carpet looking good longer and therefore increase the life of the carpet. This is a story that has spilled over from the residential market and is used as a value added benefit in the commercial market. Just like side air bags in cars, all carpets in every segment of the market are impacted by this technology. This doesn’t change the fact that the carpet requires regular maintenance. In a commercial environment this



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is particularly important – there is more soiling and spillage that can detract from the carpets appearance and longevity. Regardless of soil and stain resist treatments regular vacuuming and cleaning cannot be overlooked nor the service minimized.

Patterns

Four out of five commercial carpets have some type of pattern. Patterns require more forethought in the look, layout and pricing of an installation. You can automatically assume a patterned carpet is going to require additional work installing it - even if the pattern is perfectly straight it still has to be matched to the adjoining panel. Most patterned carpet is going to require stay nailing and stretching, particularly in large open areas. This means more time and labor – it's the nature of the beast. Carpet is a textile product and there may also be some inconsistencies in the pattern which need adjusting. If they're not badly distorted the pattern can be "worked." If the pattern bows, skews or wavers badly it may never come into a square match. This is a challenge facing the industry in several respects. Manufacturers should have better control of the carpet to prevent or minimize pattern distortion. Flooring contractors have to take into consideration costs for increased labor and time. There is a balance here that all should be aware of

And for flooring contractors – bidding a job and not knowing what type of carpet is to be installed is asking for trouble.

Products

The hottest product on the market today is carpet tiles. This should come as no surprise to anyone. The versatility of this product, the unlimited design possibilities, ease and speed of installation, transportation to and into the job site, take up and recyclability are all factors which make carpet tile the most popular form of textile floor covering. The highly engineered nature and performance characteristics of this product make it the industry's "top dog." Carpet tile will continue to grow for all the mentioned reasons and because it is simply the best form of commercial textile floor covering available. The down side to this may be that, because of carpet tiles popularity and acceptance in the marketplace every manufacturer wants a piece of the pie. Not all carpet tile constructions are created equal and because of that there may be some issues with tiles curling on the floor or not having the structural integrity they should have. A manufacturer has to know what they're doing to successfully make this product.

Hard surface products such as stone,



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ceramic, wood, laminate and luxury vinyl are all growing in popularity. These products, in the corporate market are being used more in areas that may have been traditionally carpeted. They make a statement and allow for a unique creation and design of a particular segment of space. In the commercial market carpet is still king for its many inherent attributes but hard surface floorings flexibility and assortment allow for a multitude of different looks. Even when these hard surfaces perform well, which they will, there is limitation in their use, especially in the corporate and healthcare market segments. Retail, food service and entertainment locations are where these products will find the largest volume of applications. Certainly too, in hospitals, critical care facilities, education and common areas of corporate space, hard surface is most appropriately used. One segment of the high end hard surface market is luxury vinyl tile and, in my opinion, the most beautiful of any product offered is Centiva.

Not only have they carved a niche in design and flexibility but the styling, quality and commitment to the product and serving the design community and end user is extraordinary. This is an extremely impressive product.

Backings:

This is an area that has seen dramatic change in all carpet products. Part of the change has been necessitated or self imposed by the industry in an effort to move away from PVC backed carpet tiles. Additionally, backing materials are going green, using recycled content or materials that can be more easily recycled, and every one seems to have their own variant on a backing. This is not to say that the backing change is only on tile because it is not, broadloom material too has technologically advanced backing materials. Aside from the recyclability is dimensional stability aspects and cushioning. Free Lay, which we devoted an entire CFR issue to, is included in this category; a backing system that offers densified polyurethane cushioning and performance with a polymer that allows it to be installed without gluing it to a substrate. There are even more advances relative to this system in the works.

The Market:

Overall the commercial market remains strong. Some flooring contractors have reported to us that they are being taxed to keep up with the demand. Commercial manufacturers have steady business in the corporate and healthcare market segments while some specialists in the hospitality market are, as they say down South, "covered up" – interpreted as "business is booming." Overall the commercial market is where business is being done right now. The residential remodeling and builder market is soft on average in the country. There are, as always, pockets of very slow business and others where business is still brisk, on average, with some slowdown being experienced. This should come as no surprise because the industry will follow the trends of the market place - obviously. From projects we've worked on and clients we serve and the general information available daily from being located in Dalton, Georgia, which is now the "Floor Covering Capital of the World," not just the carpet capital, as well as phone calls we receive everyday from dealers



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all over, both commercial and residential, we have a pretty good feel for what's happening in the marketplace. The commercial market should hold fast for some time, especially healthcare and hospitality.

Recycling:

Green means go in the floor covering industry and that's just what's happening particularly on the carpet side. One thing can be said about the carpet industry and that is that they are ahead of the curve when it comes to taking the initiative toward recycling and weaning off the dependency of oil based products. More and more, oil and oil based products and components are being used less. This is true of the products as well as operating the plants. The carpet industry is actually a leader in this field of endeavor and a model for other industries. All this is being done without compromising the products integrity. In fact, in almost every case, the products are advantaged by the changes taking place. Expect to see much more in this area certainly from leaders in this field such as Interface and Shaw with new recycled backings, Shaw with their new recycling plant, J&J with several ecological programs and recycling initiatives, C&A who also has several recycling and new backing initiatives and Universal Textile Technologies with Bio Balanced polyurethane backings that continually increase the amount of Soy Oil and fly ash filler eliminating the need for oil. The carpet industry is deeply involved in protecting the environment and in conserving natural resources not only in the commercial segment of the market but all market segments.

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