

Despite strong sales, the nation's specialty flooring retailers face some problems. ■ By Darius Helm

SURVEY 2005: WHAT THE RETAILERS THINK

Retail floorcovering sales were strong last year. So why did many of the retailers who responded to this year's retail survey say it was a tough year?

The flooring business was driven last year by record home sales and continued low interest rates. But supplier price increases, created by surging petroleum prices, made it difficult for retailers to maintain their margins. Add to that increases in transportation, heating and air conditioning costs, plus continually rising health insurance costs, and many respondents had to work harder than ever just to keep from losing ground.

For the first time, many retailers admitted that they're being hurt by competition from the big boxes. Particularly hard hit were dealers in the Midwest. One of them echoed the complaints of many: "The mills are selling the box stores at or only slightly above their costs. The specialty retailers are paying 10% to 20% more for the same products. The mills are going to destroy our future."

Another dealer from the Midwest addressed the issue of health insurance: "We need the industry trade associations to pressure Washington to allow group insurance for us. The WFC could recruit all members and employees to purchase as a group. Just think how this would help the mom and pop stores."

Tight margins aside, the good news is that other aspects of the retail floorcovering business are improving. Retailers continue to diversify into both new flooring categories and other interior design elements, although at a slower pace than previous years. And most retailers are satisfied with the range of products available today. Some, though, are questioning whether the quality is declining.

If interest rates stay low, 2005 will be another year of strong growth, which should help keep profits healthy in this climate of rising petroleum costs.

WHO THEY ARE

Retailers from the entire U.S. were surveyed, with respondents divided into four regions: the Midwest, the South, the East and the West. This year, the biggest number of responses, nearly 40%, came from the Midwest, followed by the



Mannington's Hickory Hill vinyl flooring.

South, with 24%. The East and West each accounted for about 18% of the respondents.

About 48% reported sales between \$1 million and \$5 million, 29% have sales of \$1 million or less, 14% are between \$5 million and \$15 million, and 10% have sales of more than \$15 million.

WHAT THEY SELL

When we asked the retailers how much of their business each flooring category accounted for, we found little change from previous years. Broadloom accounts for about 49%, compared to 48% last year and 50% the year before. Vinyl, ceramic and laminate also showed little change. Hardwood, however, jumped to 13% from 10% the previous two years, and area rugs dropped to 2% from 6% last year and 5% the year before. The latter statistic is a mystery to us, since area rugs represent such an easy add-on sale, particularly following the sale of a hardwood floor.

■ SALES BY PRODUCT

	2005	2004
BROADLOOM	49%	48%
HARDWOOD	13%	10%
CERAMIC TILE	12%	12%
VINYL	11%	12%
LAMINATE	10%	11%
AREA RUGS	2%	6%

Also mentioned: Window treatments, rubber, stone, cleaning supplies, furniture and kitchen and bath remodels.

Broadloom accounted for more sales in the East—53%—than in any other region, while the percentage of broadloom sold was lowest in the South, at 46%. The West and Midwest were right around the national average.

In the East, South and West, area rugs accounted for 2.5% to 3% of the retailers' business, but in the Midwest that number dropped to just 1.6%.

Vinyl sales were greatest in the Midwest at 13%. They ranged between 9% and 11% in the East, South and West. Laminates were uniformly at 10% or 11% in all regions.

The hardwood business showed the most regional variations. It accounted for 10% of sales in the East and 11% in the Midwest, but only 6% in the West and a whopping 16% in the South. Engineered hardwood sales are strongest in the South because of the amount of slab construction there.

Ceramic tile sales were strongest in the South and the Midwest, at 13%, while they accounted for 10% of business in the East and, surprisingly, just 9% in the West. Although ceramic tile sales have traditionally been strongest in the West and South, numbers were low in the West because that business is served primarily by ceramic tile specialty retailers rather than floorcovering retailers; that's a reflection of how well established the specialty tile business is in that part of the country.

We also asked retailers about the new product categories they're carrying. In the East, over 25% said cork; about 12% said Tarkett's FiberFloor. Others mentioned luxury vinyl tile, bamboo, ceramic, laminate, area rugs, and the floating ceramic tiles sold by Edge Flooring.

In the South, hardwood led the way, with about 25% listing it first. Interestingly, about half of the respondents referred specifically to exotic and hand scraped woods. Around 21% said cork was their newest product. Ceramic tile, bamboo, area rugs, countertops and ceramic tiles by Edge were also mentioned.

In the West, more than 25% of the respondents mentioned cork; half that number mentioned bamboo and ceramic. Once again, Edge Flooring's ceramic floor was mentioned, along with ceramic tile in general, countertops, sheet vinyl and vinyl tile.

In the Midwest, cork again led the way, though with only 10% of the respondents; 6% cited bamboo and 8% cited ceramic tile. Area rugs, Edge Flooring, Tarkett's FiberFloor, hand

scraped wood, luxury vinyl tile, outdoor carpeting and countertops were also mentioned.

The fastest growing product types across all regions were hardwood and ceramic, each accounting for 25% of all responses. Laminates followed at about 20%. Also mentioned was Tarkett's FiberFloor, hand scraped woods, cut/loop carpet, polyester carpets, and luxury vinyl tile.

TOP PROBLEMS

It seems as though there will never be a time when Installation is not the top problem for independent retailers, but it definitely seems to have improved in recent years. In 2001, 50% of the retailers surveyed reported it as their top problem. Since that peak, though, it's dropped down below 30%.

Regionally, Southern retailers had the most problems with installation; 43% of respondents reported it as the number one problem. However, retailers in the Midwest seem to have other things on their minds besides installation. Low Margins were their top problem, followed by Intense Competition, Home Centers, and then Installation, at just 14%.

Not surprisingly, Low Margins are also a leading problem for all respondents, climbing from 16% last year to 22%. The marketplace is also more competitive than ever, with Intense Competition climbing from 10% last year to 14% this year. The number of respondents reporting Home Centers as a top problem climbed from 11% to 12%.

One particularly frustrated retailer said that "for ten cents I'd get out of the floorcovering business. Costs are constantly going up; product quality is going down; the cost of samples and displays is ridiculous; competition from the big box and chain stores is impossible to meet, let alone beat. I hope to come to a point where my design services and window treatments allow me to drop flooring altogether. It just isn't fun anymore."

■ ON TOP PROBLEMS

Nationally, Installation remains the number one problem, but more retailers than ever voted Low Margins, Intense Competition or Home Centers as their top problem.

	2005	2004
1. INSTALLATION	26%	31%
2. LOW MARGINS	22%	16%
3. INTENSE COMPETITION	14%	10%
4. HOME CENTERS	12%	11%
5. FINDING GOOD WORKERS	8%	6%
UNRESPONSIVE SUPPLIERS	8%	5%
7. POOR PRODUCT QUALITY	2%	5%
8. POOR DELIVERY	1%	3%
WARRANTY CALLBACKS	1%	2%
10. LACK OF PRODUCT DIVERSITY	0%	4%

Also mentioned: Mill price increases, shipping costs, high cost of samples and displays.

KEYS TO IMPROVING BUSINESS

The chart below clearly has a relationship to the Top Problems chart on page 18. Last year, Installation Training was reported as the number one area where help was needed, along with Product/Sales Training. But this year, Improving Margins was reported as the area where the most help was needed, reflecting the pressure retailers are under to cope with the rising cost of products as well as rising overheads.

Both Installation Training and Product/Sales Training dropped from the top spot this year, with Product/Sales Training falling five percentage points. Improving Margins became more important by three percentage points.

Regionally, Improving Margins was reported as the top area where help is needed in the East, West and Midwest, while Installation led the way in the South.

The fourth and fifth spots—Advertising and Showroom Merchandising—were virtually unchanged from last year. Better Credit Programs rose to 8%, where it stood in 2003, and Maintenance climbed a point.

■ WHERE HELP IS NEEDED

The big change this year is that Improving Margins vaulted past Installation Training and Product/Sales Training, reflecting the pressures retailers are feeling.

	2005	2004
1. IMPROVING MARGINS	24%	21%
2. INSTALLATION TRAINING	19%	22%
3. PRODUCT/SALES TRAINING	17%	22%
4. ADVERTISING	15%	16%
5. SHOWROOM MERCHANDISING	10%	11%
6. BETTER CREDIT PROGRAMS	8%	5%
7. MAINTENANCE	4%	3%

Also mentioned: Computer sales system, how to combat big box stores, controlling costs, and builder training.

ON THE INTERNET

The Internet is steadily becoming more important to the nation's retailers. About 69% of all survey respondents said they have their own websites, up from 63% last year and 58% the year before. Interestingly, the South is way ahead of the other regions; a whopping 83% of respondents there reported having their own websites. Sixty two percent of respondents in the East and West have websites; the Midwest came in at 68%.

While the South is by far the most Internet savvy region, the other regions are slowly starting to catch up. All three showed increases, while the South stayed the same.

When asked if they use the Internet every day, 81% of respondents answered in the affirmative, which is about the same as the last two years. Again the South led the way, with 89% saying they go online daily. The East and West were each at 81%, while the Midwest came in at 75%.

■ HOW DO YOU USE THE INTERNET?

This year, there were far more write-in responses to this question, which suggests that as retailers become more comfortable with the Internet, they're finding more ways to use it.

	2005	2004
1. TRACK SHIPMENTS	65%	72%
2. ORDER ENTRY	56%	63%
3. CONTACT SUPPLIERS	49%	67%
4. PRODUCT RESEARCH	6%	12%
5. CONTACT CUSTOMERS	4%	6%

Also mentioned: Tracking and claiming spiffs, sending estimates and invoices, stores contacting their buying groups.

As the chart above indicates, for the second year in a row, the Internet is most commonly used to Track Shipments, although the percentage of respondents who use it for that purpose went from 72% last year to 65% this year. Using the Internet for Order Entry went from 63% last year to 56%, but that was still sufficient to put Order Entry in the second slot, since the number who use it to Contact Suppliers slipped from 67% last year to just 49% this year.

ON RETAIL GROUPS

Over the last four years, just about half of all respondents said they're in retail groups, and this year is no exception, with 51% reporting participation. The number who are considering joining a group went from a high of 23% in 2004 down to 7% this year, suggesting that few of those who haven't already joined a group are going to do so any time in the near future.

When it comes to satisfaction levels, 58% said they were very satisfied with the groups they're affiliated with, compared to 48% last year and 58% in 2003. Another 23% said they were somewhat satisfied. Only 10% were not very satisfied or not at all satisfied.

Regionally, retailers in the West were the most positive, with 77% saying they're very satisfied. At the other end of the spectrum, only 42% of dealers in the East claimed they

■ DO YOU BELONG TO A RETAIL GROUP?

	2005	2004	2003	2002	2001
YES	51%	46%	52%	44%	63%
NO	49%	54%	48%	56%	37%

■ ARE YOU CONSIDERING JOINING ONE?

	2005	2004	2003	2002	2001
YES	7%	16%	23%	16%	10%
NO	93%	84%	77%	84%	90%

were very satisfied, though another 50% claimed to be somewhat satisfied.

STATE OF THE INDUSTRY

Last year, about 40% of respondents said their margins were up, and the assumption then was that the competitive picture was looking good. However, this year only 28% reported increased margins, and 39% said margins were down, compared to 32% last year. So it seems that things are looking worse these days, and the culprit is again the rising cost of oil and its impact on everything from the cost of floorcoverings to the cost of transportation and lighting and heating a store.

Regionally, the Midwest was clearly the hardest hit. A mere 18% of retailers from that region reported a growth in margins, compared to 31% to 38% for the other regions, and 51% reported margins were down. In the Top Problems section on page 18, the Midwest was the only region that didn't list Installation as the top problem; Low Margins are a far greater concern to them than installation.

Why? The tremendous growth of floorcovering sales in home center chains certainly has a lot to do with it, and so does the rapid rise in costs in the past year.

When retailers were asked if it was getting easier or more difficult for specialty floorcovering retailers to survive, 85% answered that it was getting more difficult. Regionally, it ranged from 69% in the South to 80% in the East, 92% in the West, and 93% in the besieged Midwest.

This year, the retailers have not been as enthusiastic about diversifying. Most likely, given their complaints about competition, they're trying so hard to make a buck that they haven't had the time to focus on long term goals like diversification.

Also, 61% of respondents agreed that diversifying would improve their financial position, compared to about 66% last year. Even more telling, of those in favor of diversification, only 66% have done so, compared to 75% last year. By regions, 79% of retailers from the East have diversified,

about 70% from the South and West, and only 57% from the Midwest.

In terms of the products favored for diversification, window treatments, countertops and ceramic tile led the way, followed by area rugs, cork and stone.

HOT PRODUCTS

Several hot products from previous years stumbled a bit this year, like more patterned and textured broadloom, as well as laminate, hardwood and polypropylene rugs. Fewer retailers reported sales growth in those categories, and for all but hardwood and polypropylene rugs, more retailers reported a dip in sales compared to last year.

ON BROADLOOM

On average, broadloom accounted for 49% of sales. Regionally, it was highest in the East at 53% and lowest in the South at 46%.

Solid color broadloom was weakest in the Midwest and West, where less than 12% of respondents reported sales growth and well over 50% reported sales in that category were down. It was strongest in the East, where 19% reported growth and 31% reported a drop in sales (and the balance reported no change).

Over the last few years, textured and patterned broadloom has been growing at solid's expense, but this year both textured and patterned broadloom seemed to dip slightly. However, it seems to be a regional effect. While 62% of retailers in the East, 54% of those from the Midwest, and 60% of those from the West reported sales growth for textured broadloom, only 43% of Southern dealers reported sales increases.

On the patterned broadloom side, sales were also strongest in the East (69%), followed by 60% for the West, 51% for the South and a dismal 40% for the Midwest.

ON AREA RUGS

Last year was a difficult one for rug sales among floorcover-

■ GAINERS AND LOSERS

	MORE		LESS		SAME	
	2005	2004	2005	2004	2005	2004
SOLID BROADLOOM	13%	17%	46%	39%	41%	44%
TEXTURED BROADLOOM	54%	57%	13%	8%	33%	35%
PATTERNED BROADLOOM	52%	53%	24%	18%	24%	29%
POLYPROPYLENE RUGS	29%	35%	30%	30%	41%	35%
WOOL RUGS	27%	26%	30%	20%	43%	54%
VINYL TILE	34%	26%	33%	39%	33%	35%
SHEET VINYL	16%	17%	50%	48%	34%	35%
CERAMIC	80%	73%	6%	6%	14%	21%
HARDWOOD	74%	77%	10%	12%	16%	11%
LAMINATE	52%	70%	21%	12%	27%	18%
CORK	46%	35%	14%	14%	40%	51%
BAMBOO	33%	34%	18%	23%	49%	43%

ing specialists. Of those surveyed, rugs accounted for only about 2% of sales, down from 6% last year. Numbers ranged from 3% in the East down to 1.6% in the Midwest.

More respondents reported wool rugs sales up, reversing a trend of at least three years. More reported that polypropylene rug sales were down, also reversing a trend, but confirming anecdotal evidence that higher end products have been doing well.

Polypropylene rugs did best in the East, where 41% of retailers reported sales were up; in the Midwest only 16% reported increases and over 50% reported sales were down (the remainder reported that sales were flat). And while 84% of respondents from the East actually sell polypropylene rugs, only 65% of Midwest retailers surveyed carry them, along with about 70% of retailers from the West and 71% of those in the South.

Nationally, only 72% of respondents carry polypropylene rugs, and a mere 55% carry wool rugs. In the West, however, 65% carry wool.

ON VINYL

Overall, sheet vinyl showed a minor decline and vinyl tile showed solid growth, continuing the trend toward increased sales of luxury vinyl tile as opposed to lower end self stick tiles.

Nearly 97% of the respondents carry sheet vinyl, while about 90% carry some form of vinyl tile. This year, every dealer in the Midwest reported carrying sheet vinyl and some 93% reported carrying vinyl tile. Vinyl tile had the lowest representation in the West, where only 85% of respondents reported carrying it.

Sales of sheet vinyl were clearly worst in the East, with only 8% of respondents reporting a rise in sales and 50% reporting a decline, compared to the strongest regions, the West, which reported 21% up against 50% down, and the Midwest, which reported 18% up and 47% down.

Vinyl tile sales were best in the South, with 42% reporting growth and 29% reporting a decline. Sales in the East were worst, with 26% reporting growth compared to 39% reporting a decline.

ON HARDWOOD

Hardwood is still a hot product. It accounts for 13% of the revenues of the retailers surveyed this year, up from 10% last year, and 95% of those surveyed carry hardwood. Regionally, hardwood sales are strongest in the South and weakest in the West.

This year, 74% of all retailers reported gains and 10% reported losses compared to 77% reporting gains and 12% re-



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porting losses in 2004; 16% said sales were flat compared to 11% last year.

Over the last year, hardwood did extremely well in the South, where much of the engineered hardwood business is focused. Nearly 90% of respondents from the South said sales were up compared to only 3% who reported a decline. The East fared nearly as well. In the Midwest, only 60% reported sales gains and 16% reported declines.

Cork and bamboo continue to show moderate gains, with cork garnering more attention than bamboo. An impressive 46% reported cork sales were up compared to 35% last year. About the same number reported that bamboo sales were up and fewer said they were down, so there were some small gains for that niche product.

Interestingly, retailers in the West sell more bamboo and cork than any other region—85% of respondents from that region sell bamboo and over 60% sell cork.

ON CERAMIC

In recent years, ceramic tile sales have been just about unstoppable. About 88% of retailers surveyed sell ceramic or porcelain tile. Not surprisingly, the South leads the way, with nearly 95% of retailers selling it, while the East lags, with only 77% selling it. Compared to five years ago, though, those numbers show dramatic gains. Back then, very few floorcovering retailers carried ceramic tile.

Sales were also strongest in the South, with 85% reporting gains and no one reporting declines. Sales gains were slowest in the West, with only 74% reporting gains. Nevertheless, the West Coast is a strong, well established ceramic market and most tile in that region is sold through ceramic tile specialists, who had well established busi-

nesses long before the independent flooring retailers started carrying it.

ON LAMINATE

Just about the only hard surface category whose growth is lagging this year is laminate. This year 52% reported that sales were up and 14% said they were down, compared to 70% and 12%, respectively, last year. About 27% reported sales unchanged, compared to 18% last year.

Regionally, laminates fared worst in the West and Midwest, where about 44% reported gains and 21% reported losses. Laminates were strongest in the East, with 63% reporting gains and only 8% reporting losses.

ON SUPPLIERS

This year, for the first time, we asked the retailers to tell us about their favorite suppliers of adhesives, installation equipment, accessories, and cleaning equipment and supplies. About 20% of the responses named distributors as their favorite suppliers, but these were not included since most distributors handle multiple product lines. ■

■ THE WINNER

Respondents to this survey were entered into a drawing for a \$500 cash award sponsored by Stainmaster Carpet. This year's winner is:

David Arita
The Carpet Shoppe
Honolulu, HI

■ FAVORITE SUPPLIERS

Though a number of retailers identified their suppliers by naming their distributors, most respondents seemed knowledgeable about the various suppliers and had strong feelings about where they ranked.

ADHESIVES

1. WF TAYLOR
2. MAPEI
- BOSTIK
4. PARABOND
- HENRY

INSTALLATION EQUIPMENT

1. ROBERTS
- CRAIN

ACCESSORIES

1. ROPPE
2. JOHNSONITE
- ROBERTS

CLEANING EQUIPMENT/SUPPLIES

1. MOHAWK
2. BONA KEMI
3. TEC
- ARMSTRONG
- HOST/RACINE

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■ FAVORITE CARPET MANUFACTURER

SERVICE

Shaw took nearly 60% of the vote in this category from less than 50% last year. Gulistan was a newcomer to the list.

1. SHAW
2. MOHAWK
3. BEAULIEU
4. DIXIE
5. GULISTAN

Also mentioned: Cherokee, Milliken, Royalty.

QUALITY

This year's results are almost identical to last year's, though Dixie moved ahead of Beaulieu for the third spot.

1. SHAW
2. MOHAWK
3. DIXIE
4. BEAULIEU
5. MILLIKEN
GULISTAN

Also mentioned: Blue Ridge, Catalina, Kraus, Royalty, Stanton.

DESIGN

Though Shaw led in this category again, it garnered 44%, down from last year, while Mohawk got 31%, up from 20% last year.

1. SHAW
2. MOHAWK
3. DIXIE
4. BEAULIEU
5. ROYALTY

Also mentioned: Blue Ridge, Burtco, Gullistan, Milliken, Moda, Nourison, Stanton.

■ FAVORITE AREA RUG MANUFACTURER

SERVICE

Shaw Living won this category for the 6th straight year, this time with a whopping 38% of the vote. Oriental Weavers had 18% and Mohawk had 13%.

1. SHAW LIVING
2. ORIENTAL WEAVERS
3. MOHAWK
4. NOURISON
5. MASLAND

Also mentioned: 828, Capel, Colonial Mills, Dalyn, Dynamic, Fabrica, Milliken, Stanton, TransOcean.

QUALITY

Shaw got about a third of the votes in this category, up from 25% last year. Nourison continued to climb, from third last year to second this year.

1. SHAW LIVING
2. NOURISON
3. MOHAWK HOME
4. ORIENTAL WEAVERS
5. MASLAND

Also mentioned: American Home Designs, Colonial, Couristan, Delos, Fabrica, Glen Eden, Milliken, Momeni, Stanton, TransOcean.

DESIGN

Shaw again won this category, with 36% of the vote, somewhat distancing itself from Nourison and Oriental Weavers, which were neck and neck at 15% and 14%.

1. SHAW LIVING
2. NOURISON
3. ORIENTAL WEAVERS
4. MOHAWK HOME
5. COURISTAN

Also mentioned: 828, American Home Designs, Delos, Dubois Rugs, Glen Eden, Hellenic, Masland, Milliken, Momeni, Stanton, TransOcean, United Weavers.

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■ FAVORITE VINYL MANUFACTURER

SERVICE

For the third year in a row, Mannington swept the vinyl categories, though the big surprise this year was Congoleum supplanting Armstrong in all categories.

1. MANNINGTON
2. CONGOLEUM
3. ARMSTRONG
4. TARKETT
5. DOMCO

Also mentioned: Balta.

QUALITY

Mannington gained in Quality, from 44% of the vote last year to 52% this year. Congoleum went from 14% to 20% while Stainmaster made the list for the first time.

1. MANNINGTON
3. CONGOLEUM
2. ARMSTRONG
4. TARKETT
5. STAINMASTER

Also mentioned: Amtico, Balta, Domco.

DESIGN

Mannington's domination of the Design category increased, with nearly two thirds of the votes. Congoleum was a distant second with 15% of the votes.

1. MANNINGTON
3. CONGOLEUM
2. ARMSTRONG
4. TARKETT
5. AMTICO
DOMCO

Also mentioned: Stainmaster.

■ FAVORITE CERAMIC MANUFACTURER

SERVICE

As usual, Dal-Tile swept the ceramic categories, though by smaller margins. In Service, the firm garnered 40% of the votes. Mohawk, Shaw and Florida Tile were all bunched together around 12%.

1. DAL-TILE/AM. OLEAN
2. MOHAWK
3. SHAW
4. FLORIDA TILE
5. MANNINGTON
6. INTERCERAMIC

Also mentioned: Acif, Arizona, Armstrong, Emser, Interceramic, IWT, Laufen, Legacy, Studio Ceramic, Supergres.

QUALITY

Dal-Tile dropped from 44% last year to 33% this year. Mannington and Florida Tile reversed positions.

1. DAL-TILE/AM. OLEAN
2. MANNINGTON
3. SHAW
4. CROSSVILLE
5. FLORIDA TILE
6. MOHAWK
7. LAUFEN

Also mentioned: Acif, Arizona, Azuvi, Cerdomus, Emser, Grespania, Leningrad, Marazzi, Royalty, Studio Ceramic, SuperGres, Tagina.

DESIGN

Dal-Tile took 40% of the Design vote, down from 44% last year, Florida Tile was once again second. A record number of companies received votes this year.

1. DAL-TILE/AM OLEAN
2. FLORIDA TILE
3. MOHAWK
4. MANNINGTON
5. CROSSVILLE
6. SHAW

Also mentioned: Arizona, Azuvi, Casa Dolce Casa, IWT, Kronas, Landmark Metal, Laufen, Magica, Marazzi, Royalty, Studio Ceramic.

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■ FAVORITE LAMINATE MANUFACTURER

SERVICE

For the fifth year in a row, Wilsonart won this category, with a more comfortable margin over Mannington than last year. Shaw and Quick-Step were close behind.

1. WILSONART
2. MANNINGTON
3. SHAW
4. QUICK-STEP
5. PERGO
6. ALLOC
7. MOHAWK

Also mentioned: Armstrong, BHK, Columbia, Galleria, Tarkett, Witex.

QUALITY

Wilsonart easily won this category, also for the fifth straight year, and its margin of victory grew over the last year, with 41% of the vote. Following Mannington at 17%, Quick-Step was a strong third at 11%.

1. WILSONART
2. MANNINGTON
3. QUICK-STEP
4. ALLOC
5. SHAW
6. MOHAWK

Also mentioned: Armstrong, Pergo, Witex.

DESIGN

Mannington won this category for the second year, though it garnered only 26% of the vote, compared to 37% last year. Wilsonart had 23%, the same as last year.

1. MANNINGTON
2. WILSONART
3. ARMSTRONG
4. QUICK-STEP
5. SHAW
6. ALLOC
7. MOHAWK

Also mentioned: Berry, BHK, Columbia, Kronotex, Pergo, Robina, Tarkett, Witex.

■ FAVORITE HARDWOOD MANUFACTURER

SERVICE

Armstrong won this category with 20% of the vote. Mannington was a close second with 18%. Mirage was a strong third with 12%.

1. ARMSTRONG
2. MANNINGTON
3. MIRAGE
4. MOHAWK
5. SHAW
6. LAUZON
7. SOMERSET
8. KÄHRS

Also mentioned: Anderson, Award, BR-111, Columbia, Goodwin, Homerwood, Mercier, Mullican, Muskoka, Tarkett, Weyerhaeuser.

QUALITY

Mirage, which won this category two years ago, then slipped to fifth place last year, bounced back with 20% of the vote, followed by 17% for Mannington, which won last year.

1. MIRAGE
2. MANNINGTON
3. ARMSTRONG
4. LAUZON
5. KÄHRS
6. ANDERSON
7. MOHAWK
8. MERCIER

Also mentioned: Award, BR-111, Columbia, Goodwin, Homerwood, Mullican, Muskoka, Natural Cork, Shaw, Somerset, Tarkett, Weyerhaeuser.

DESIGN

Anderson won this category for the first time ever, with 19% of the vote. Armstrong was close behind with nearly 18%. Mannington and Mirage came in at 11% and 10%, respectively.

1. ANDERSON
2. ARMSTRONG
3. MANNINGTON
4. MIRAGE
5. MOHAWK
6. BR-111
7. LAUZON

Also mentioned: Award, Capella, Columbia, Homerwood, Kährs, Mercier, Mullican, Muskoka, Oshkosh, Pinnacle, Shaw, Somerset, Tarkett, Weyerhaeuser.