

Raised Access Flooring Market - Global Outlook and Forecast 2020-2025

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Abstracts

The global raised access floor market is expected to grow at a CAGR of over 2% during the period 2019–2025.

The usage of raised access flooring technology is increasing due to the growth in the construction market. The optimal use of floor space is one of the primary reasons for the growth of this technology. The increase in building permits for private residential houses and the growth of commercial construction are key factors influencing the market significantly. The demand for raised access floor is also stemming from retrofit projects, which is expected to aid the global raised access floor market during the forecast period.

The increase in the number of data center projects is another contributor to the market growth. The US, China, Germany, India, Japan, UK, and Singapore were the most preferred locations for the development of hyperscale data centers in 2019. More than 70 hyperscale data centers were opened or under construction in 2019. Moreover, the US alone is likely to add around 30 hyperscale data center facilities by 2023. For instance, GIGA Data Centers opened a 60 MW data center facility in North Carolina, the US in 2019. Apple announced its plan to invest \$10 billion in data centers across the US in the next five years in December 2018. Hence, increased investments from hyperscale service providers are expected to benefit raised access flooring manufacturers.

The following factors are likely to contribute to the growth of the raised access floor market during the forecast period:

5G Deployment to Increase Edge Data Center Investments

Rise of Industry 4.0

Growth in Infrastructure at Airports

Growth in the Construction Sector

Increasing Construction of Hyperscale Data Centers

The study considers the present scenario of the raised access floor market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Raised Access Floor Market: Segmentation

This research report includes detailed segmentation by type, end-user, and geography. Steel-based raised access floor is witnessing major demand as it offers high durability and can accommodate major types of floor finishing. The market for steel-based panels is leading as the availability of steel as raw material is in abundance. The demand for steel panels is expected to grow further as they are the first choice among first-time users. The segment is also growing because steel panels prevent deformation, thereby easing calibration. The demand from renovation construction is also high for steel panel flooring. However, the volatility in steel is a restraining factor for the market. The US government's decision to impose a tariff of 25% and 10% on steel and aluminum, respectively, sourced from China is likely to hamper the growth of the steel concretes.

The raised access floor technology is finding increasing application in data centers across the world. The increasing internet penetration in countries such as the US and Canada is growing. This rate is likely to increase further as the adoption of smartphones and handheld connected devices is increasing, thereby increasing data consumption. The data growth is also attributed to technological advancements in the past decade, such as cloud computing, big data, and the internet of things (IoT). Hence, the increased data consumption is leading to development data centers, which, in turn, increase the demand for raised access floors.

Commercial office real estate remains a major construction activity in the overall urban development. The growth in office spaces has increased globally, with some regions

exhibiting rapid progress on account of their economic growth. For instance, in India, during H1 2019, the office space leasing crossed 30 million square feet, which was an increase of around 40% than 2018. The increasing need for office spaces with low maintenance cost and highly sustainable facilities is expected to increase the demand for raised access floor during the forecast period.

Market Segmentation by Type

Steel Concrete

Calcium Sulfate Board

Chipboard Core

Others

Market Segmentation by End-user

Data Centers

Commercial Buildings

Office Workplaces

Command Centers

Others

Insights by Geography

A large part of demand in North America comes from new construction projects that are expected to drive the market. The demand for raised access floor in the region is driven by the massive size of end-user industries such as data centers; commercial enterprises such as retail, semiconductor, aerospace; and sizeable public utility centers. The region stands as a leader in innovative manufacturing practices, reinforced by comprehensive product development with an emphasis on energy-efficiency, reduced lifecycle costs, and sustainability. The growth in the general commercial construction

demand and the high availability of low-cost labor has boosted the growth in the APAC region. The major drivers in the APAC region include the growth of data centers market on account of the growing number of internet users, the increased use of social media, and high smartphone penetration, the increased adoption of public cloud and hybrid cloud services, and the need for enterprises to migrate from server rooms to data centers. The European market for raised access floor is strong in Western Europe, where the data center footprint is high, especially in the Netherlands, the UK, France, and Germany. The market in Southern Europe is expected to grow steadily. The construction market in Europe is more agile in adopting new technologies than the US. Office spaces, utility centers, and commercial buildings in key cities with high construction activities make use of floor panels. The European region has a significant number of trade agreements that favor trade liberalization and help seamless sourcing, with reduced complexity with respect to duties and taxes on floor panels, and floor finishes products.

Market Segmentation by Geography

North America

US

Canada

Europe

France

Germany

UK

Italy

Spain

APAC

China

Japan

South Korea

India

Australia

MEA

South Africa

Turkey

Saudi Arabia

Israel

Latin America

Mexico

Brazil

Colombia

Chile

Insights by Vendors

The global raised access floor market is highly fragmented, with no major vendors having a significant share. The market is characterized by vendors that are application-specific, product-specific, or multiple-service providers at any point in time. The selection criteria mainly depend on access to raw material, pricing models, and portfolios. The competitive landscape of the industry is scattered across different geographical regions and flooring type variations. The market is divided into developing and developed regions, with a high variation in the demand and supply ratio. The market is in a nascent stage of growth. The growth is expected to be majorly driven by

data centers and office spaces. The competition is currently stiff in the data center and workspace segments, as several companies are looking to gain the first-mover advantage.

Key Vendors

Lindner Group

Knauf

Exyte Technologies

Gamma Industries

Everest Industries Limited

Eurodek

Comey

JVP

Kingspan

United Office Systems Pvt. Ltd

AET Building Products Pvt. Ltd.

Haworth

Polygroup

Bathgate Flooring

Mero Tsk

Jansen Access Floor

Porcelanosa

Lenzlinger

Veitchi Flooring

CBI Europe

Akdag S. W

ASP Access Floors

Huatong Xinli Flooring

Key Market Insights

The analysis of the global raised access floor market provides sizing and growth opportunities for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the raised access floor market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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