

# Global Commercial Flooring Underlayment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Commercial Flooring Underlayment market size is expected to reach \$ 881 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

Commercial flooring underlayment is a functional intermediate layer installed between the commercial subfloor and the finished floor covering, designed to manage impact sound, control moisture vapor migration, enhance load distribution and durability, and provide a stable base for high traffic environments. It is most commonly supplied as rolls and sheets, with boards and jobsite leveling underlayments in cementitious or gypsum based formats also widely used in projects. Typical material families include rubber and cork acoustic layers, felt and composite mats, polyolefin foam underlays, vapor barrier and uncoupling membranes, and leveling systems that support fast, reliable installation. It is applied across offices, retail, hospitality, healthcare, education and public buildings, supporting resilient floors, carpet tiles, floating systems and thin tile assemblies, and it becomes particularly critical where fire performance, indoor air quality, compressive resilience and schedule efficiency are tightly specified. In supply, scaled foam and fiber production is strong in China and Southeast Asia, acoustic rubber and cork have long established bases in parts of Europe, and North America and Europe place heavier emphasis on standardized testing, certified systems and project delivery capability, shaping a global market segmented by performance grade and assembly requirements.

In 2025, global commercial flooring underlayment shipments (expressed as equivalent floor area covered, spanning commercial-grade acoustic layers, vapor/barrier and uncoupling membranes, plus jobsite leveling underlayments used across offices, retail, hospitality, healthcare and education) were reasonably estimated at about 60–100 million m<sup>2</sup>. On a manufacturer ex-works basis (FOB-equivalent), mainstream

commercial-grade products typically clustered around roughly USD 3–14 per m<sup>2</sup>, while higher-performance system solutions such as rubber acoustic underlays and uncoupling membranes could reach around USD 25 per m<sup>2</sup>.

Across global commercial interiors, underlayment is shifting from an accessory to a central lever for performance and delivery risk control. Renovation led demand in commercial and public buildings remains steady, and the continued penetration of resilient floors and thin set assemblies raises the importance of moisture stability and substrate readiness as recurring specification requirements. At the same time, higher sensitivity to the acoustic environment in open plan and mixed use spaces is expanding demand for impact sound reduction from premium projects into more standardized applications. Expectations for healthier interiors are also rising, with more projects requiring verified test data and environmental documentation, pushing the category toward performance and compliance differentiation rather than price alone.

The category faces pressure from commoditization and raw material volatility, while regional differences in fire performance, emissions expectations and acoustic evaluation frameworks increase certification complexity. The most material risk is system compatibility and installation quality, because commercial projects have lower tolerance for callbacks, and poor selection for damp substrates, heavy load zones or intensive cleaning environments can lead to debonding, edge lift, mold concerns, joint damage or disappointing acoustic outcomes, where rework costs quickly exceed the initial material savings. As a result, manufacturers that deliver system level solutions with clear compatibility boundaries, practical installation guidance, and standardized training and execution are better positioned to win repeat demand from contractors and multi site operators.

This report studies the global Commercial Flooring Underlayment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Commercial Flooring Underlayment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Commercial Flooring Underlayment that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Commercial Flooring Underlayment total production and demand, 2021-2032, (K Sqm)

Global Commercial Flooring Underlayment total production value, 2021-2032, (USD Million)

Global Commercial Flooring Underlayment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Commercial Flooring Underlayment consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Commercial Flooring Underlayment domestic production, consumption, key domestic manufacturers and share

Global Commercial Flooring Underlayment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Commercial Flooring Underlayment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Commercial Flooring Underlayment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Commercial Flooring Underlayment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hubei Xiangyuan New Material Technology, Zhejiang Runyang New Material Technology, Shenzhen CYG TEFA Technology, Changzhou Ouya Packaging Material Factory, Changzhou Xindingxin New Material Technology, Changzhou Haichen Decoration Material, Zhangjiagang Bolilong Packing Material, Jiangsu Zhongxinhe New Material Technology, Changzhou New Top Star New Material Technology, Zhejiang Xinhengtai New Material, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Commercial Flooring Underlayment market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (USD/Sqms) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## Global Commercial Flooring Underlayment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Commercial Flooring Underlayment Market, Segmentation by Type:

CBU System and Plywood

Rubber

Cork

Fiber and Felt

Others

## Global Commercial Flooring Underlayment Market, Segmentation by Technology or Integration Level:

Carpet Flooring

Resilient Flooring

Hardwood and Laminate Flooring

Others

Global Commercial Flooring Underlayment Market, Segmentation by Form:

Roll and Sheet Underlayment

Panel Underlayment

Others

Global Commercial Flooring Underlayment Market, Segmentation by End-Use Sector:

Sound Insulation Type

Load Bearing and Stability Type

Moisture Protection Type

Others

Global Commercial Flooring Underlayment Market, Segmentation by Application:

Office and Retail

Hospitality and Healthcare

Education and Public Buildings

Others

Companies Profiled:

Hubei Xiangyuan New Material Technology

Zhejiang Runyang New Material Technology

Shenzhen CYG TEFA Technology

Changzhou Ouya Packaging Material Factory

Changzhou Xindingxin New Material Technology

Changzhou Haichen Decoration Material

Zhangjiagang Bolilong Packing Material

Jiangsu Zhongxinhe New Material Technology

Changzhou New Top Star New Material Technology

Zhejiang Xinhengtai New Material

USG Corporation

James Hardie Industries

National Gypsum Company

Schluter-Systems

Custom Building Products

QEP

MP Global Products

Amorim Cork Solutions

Manton Cork

Pak-Lite

Sealed Air

MAPEI

ARDEX

LATICRETE

UZIN UTZ

REGUPOL

Ecore

Dura Underlayment

Maxxon Corporation

Hacker Industries

**Key Questions Answered:**

1. How big is the global Commercial Flooring Underlayment market?
2. What is the demand of the global Commercial Flooring Underlayment market?
3. What is the year over year growth of the global Commercial Flooring Underlayment market?
4. What is the production and production value of the global Commercial Flooring Underlayment market?
5. Who are the key producers in the global Commercial Flooring Underlayment market?
6. What are the growth factors driving the market demand?

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