

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

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Abstracts

The global Residential Flooring Underlayment market size is expected to reach \$ 2462 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Residential flooring underlayment is a functional intermediate layer installed between the residential subfloor and the finished floor to enhance comfort and quietness, limit moisture vapor migration, cushion minor substrate irregularities, and distribute localized loads, improving durability and daily living experience. It is typically supplied as rolls and sheets, with boards and pourable leveling materials also used in certain assemblies. Common material families include polyolefin foam underlays, felt and nonwoven fiber layers, cork and rubber acoustic pads, composite vapor barrier and uncoupling membranes, and cementitious or gypsum based leveling underlayments. Applications span click installations of laminate and wood flooring, fast install resilient flooring systems, thin tile assemblies requiring moisture separation and crack management, and renovation projects where acoustic and moisture performance upgrades are prioritized; on the supply side, foam and fiber underlays are strongly scaled in China and parts of Southeast Asia, cork maintains long standing strength in Europe, and North America and Europe emphasize standardized, certified membrane and leveling systems, creating a global market segmented by material and performance tiers.

In 2025, global residential flooring underlayment shipments (expressed as equivalent floor area covered, spanning mainstream foam/fiber underlays and higher-performance cork/rubber acoustic layers and membranes used in home installations) were reasonably estimated at about 210-280 million m². On a manufacturer ex-works basis (FOB-equivalent), typical foam and fiber products generally clustered around roughly USD 1.5-6 per m², mid-to-premium cork/rubber acoustic layers and uncoupling or

barrier membranes often fell around USD 6-12 per m², and a smaller set of high-performance system solutions could reach about USD 18-25 per m².

In the global residential market, flooring underlayment is moving from a hidden accessory to a critical driver of floor system experience and brand reputation. Expansion of renovation activity and higher living density are making impact sound control more relevant to homeowners, while continued growth of click and fast install resilient floors increases the need for moisture protection and dimensional stability. Rising attention to healthier interiors is also accelerating the shift toward low odor, low emission formulations and clearer test backed labeling, enabling leading brands to differentiate with verified performance rather than price alone.

Challenges are primarily driven by commoditization and raw material volatility, and regional differences in emissions and fire performance expectations raise compliance and certification hurdles. Because underlayment performance is highly application sensitive, poor selection or installation on damp substrates, radiant heating systems, or higher load rooms can lead to callbacks such as bubbling, mold concerns, joint damage, or disappointing acoustic results, where rework costs can far exceed the initial material savings; therefore, manufacturers that provide clear selection guidance, installation discipline, and system compatibility documentation, supported by channel training and standardized delivery practices, are better positioned to win repeat demand.

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

This report is a detailed and comprehensive analysis of the world market for Residential 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 Residential Flooring Underlayment that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

Global Residential Flooring Underlayment consumption by region & country, CAGR,

2021-2032 & (K Sqm)

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

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

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

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

This report profiles key players in the global Residential 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 Residential 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 (US\$/Sq m) 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 Residential Flooring Underlayment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Residential Flooring Underlayment Market, Segmentation by Type:

Foam

Cork

Rubber

Others

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

Single-Function Underlay

Integrated Underlay

Smart Underlay

Global Residential Flooring Underlayment Market, Segmentation by Form:

Roll Underlayment

Panel Underlayment

Others

Global Residential Flooring Underlayment Market, Segmentation by Product Thickness:

Thin Type

Standard Type

Thick or Special Type

Global Residential Flooring Underlayment Market, Segmentation by Application:

Laminate Flooring

Hardwood Flooring

Tile Flooring

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 Underayment

Maxxon Corporation

Hacker Industries

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Residential Flooring Underlayment Introduction
- 1.2 World Residential Flooring Underlayment Supply & Forecast
 - 1.2.1 World Residential Flooring Underlayment Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Residential Flooring Underlayment Production (2021-2032)
 - 1.2.3 World Residential Flooring Underlayment Pricing Trends (2021-2032)
- 1.3 World Residential Flooring Underlayment Production by Region (Based on Production Site)
 - 1.3.1 World Residential Flooring Underlayment Production Value by Region (2021-2032)
 - 1.3.2 World Residential Flooring Underlayment Production by Region (2021-2032)
 - 1.3.3 World Residential Flooring Underlayment Average Price by Region (2021-2032)
 - 1.3.4 North America Residential Flooring Underlayment Production (2021-2032)
 - 1.3.5 Europe Residential Flooring Underlayment Production (2021-2032)
 - 1.3.6 China Residential Flooring Underlayment Production (2021-2032)
 - 1.3.7 Japan Residential Flooring Underlayment Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Residential Flooring Underlayment Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Residential Flooring Underlayment Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Residential Flooring Underlayment Demand (2021-2032)
- 2.2 World Residential Flooring Underlayment Consumption by Region
 - 2.2.1 World Residential Flooring Underlayment Consumption by Region (2021-2026)
 - 2.2.2 World Residential Flooring Underlayment Consumption Forecast by Region (2027-2032)
- 2.3 United States Residential Flooring Underlayment Consumption (2021-2032)
- 2.4 China Residential Flooring Underlayment Consumption (2021-2032)
- 2.5 Europe Residential Flooring Underlayment Consumption (2021-2032)
- 2.6 Japan Residential Flooring Underlayment Consumption (2021-2032)
- 2.7 South Korea Residential Flooring Underlayment Consumption (2021-2032)
- 2.8 ASEAN Residential Flooring Underlayment Consumption (2021-2032)
- 2.9 India Residential Flooring Underlayment Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Residential Flooring Underlayment Production Value by Manufacturer (2021-2026)

3.2 World Residential Flooring Underlayment Production by Manufacturer (2021-2026)

3.3 World Residential Flooring Underlayment Average Price by Manufacturer (2021-2026)

3.4 Residential Flooring Underlayment Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Residential Flooring Underlayment Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Residential Flooring Underlayment in 2025

3.5.3 Global Concentration Ratios (CR8) for Residential Flooring Underlayment in 2025

3.6 Residential Flooring Underlayment Market: Overall Company Footprint Analysis

3.6.1 Residential Flooring Underlayment Market: Region Footprint

3.6.2 Residential Flooring Underlayment Market: Company Product Type Footprint

3.6.3 Residential Flooring Underlayment Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Residential Flooring Underlayment Production Value Comparison

4.1.1 United States VS China: Residential Flooring Underlayment Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Residential Flooring Underlayment Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Residential Flooring Underlayment Production Comparison

4.2.1 United States VS China: Residential Flooring Underlayment Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Residential Flooring Underlayment Production Market

Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Residential Flooring Underlayment Consumption Comparison

4.3.1 United States VS China: Residential Flooring Underlayment Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Residential Flooring Underlayment Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Residential Flooring Underlayment Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Residential Flooring Underlayment Production Value (2021-2026)

4.4.3 United States Based Manufacturers Residential Flooring Underlayment Production (2021-2026)

4.5 China Based Residential Flooring Underlayment Manufacturers and Market Share

4.5.1 China Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Residential Flooring Underlayment Production Value (2021-2026)

4.5.3 China Based Manufacturers Residential Flooring Underlayment Production (2021-2026)

4.6 Rest of World Based Residential Flooring Underlayment Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Residential Flooring Underlayment Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Residential Flooring Underlayment Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Residential Flooring Underlayment Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Foam

5.2.2 Cork

5.2.3 Rubber

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Residential Flooring Underlayment Production by Type (2021-2032)

5.3.2 World Residential Flooring Underlayment Production Value by Type (2021-2032)

5.3.3 World Residential Flooring Underlayment Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY TECHNOLOGY OR INTEGRATION LEVEL

6.1 World Residential Flooring Underlayment Market Size Overview by Technology or Integration Level: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Technology or Integration Level

6.2.1 Single-Function Underlay

6.2.2 Integrated Underlay

6.2.3 Smart Underlay

6.3 Market Segment by Technology or Integration Level

6.3.1 World Residential Flooring Underlayment Production by Technology or Integration Level (2021-2032)

6.3.2 World Residential Flooring Underlayment Production Value by Technology or Integration Level (2021-2032)

6.3.3 World Residential Flooring Underlayment Average Price by Technology or Integration Level (2021-2032)

7 MARKET ANALYSIS BY FORM

7.1 World Residential Flooring Underlayment Market Size Overview by Form: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Form

7.2.1 Roll Underlayment

7.2.2 Panel Underlayment

7.2.3 Others

7.3 Market Segment by Form

7.3.1 World Residential Flooring Underlayment Production by Form (2021-2032)

7.3.2 World Residential Flooring Underlayment Production Value by Form (2021-2032)

7.3.3 World Residential Flooring Underlayment Average Price by Form (2021-2032)

8 MARKET ANALYSIS BY PRODUCT THICKNESS

8.1 World Residential Flooring Underlayment Market Size Overview by Product Thickness: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Product Thickness

8.2.1 Thin Type

8.2.2 Standard Type

8.2.3 Thick or Special Type

8.3 Market Segment by Product Thickness

8.3.1 World Residential Flooring Underlayment Production by Product Thickness (2021-2032)

8.3.2 World Residential Flooring Underlayment Production Value by Product Thickness (2021-2032)

8.3.3 World Residential Flooring Underlayment Average Price by Product Thickness (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Residential Flooring Underlayment Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Laminate Flooring

9.2.2 Hardwood Flooring

9.2.3 Tile Flooring

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Residential Flooring Underlayment Production by Application (2021-2032)

9.3.2 World Residential Flooring Underlayment Production Value by Application (2021-2032)

9.3.3 World Residential Flooring Underlayment Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Hubei Xiangyuan New Material Technology

10.1.1 Hubei Xiangyuan New Material Technology Details

10.1.2 Hubei Xiangyuan New Material Technology Major Business

10.1.3 Hubei Xiangyuan New Material Technology Residential Flooring Underlayment Product and Services

10.1.4 Hubei Xiangyuan New Material Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Hubei Xiangyuan New Material Technology Recent Developments/Updates

10.1.6 Hubei Xiangyuan New Material Technology Competitive Strengths &

Weaknesses

10.2 Zhejiang Runyang New Material Technology

10.2.1 Zhejiang Runyang New Material Technology Details

10.2.2 Zhejiang Runyang New Material Technology Major Business

10.2.3 Zhejiang Runyang New Material Technology Residential Flooring Underlayment Product and Services

10.2.4 Zhejiang Runyang New Material Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 Zhejiang Runyang New Material Technology Recent Developments/Updates

10.2.6 Zhejiang Runyang New Material Technology Competitive Strengths &

Weaknesses

10.3 Shenzhen CYG TEFA Technology

10.3.1 Shenzhen CYG TEFA Technology Details

10.3.2 Shenzhen CYG TEFA Technology Major Business

10.3.3 Shenzhen CYG TEFA Technology Residential Flooring Underlayment Product and Services

10.3.4 Shenzhen CYG TEFA Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Shenzhen CYG TEFA Technology Recent Developments/Updates

10.3.6 Shenzhen CYG TEFA Technology Competitive Strengths & Weaknesses

10.4 Changzhou Ouya Packaging Material Factory

10.4.1 Changzhou Ouya Packaging Material Factory Details

10.4.2 Changzhou Ouya Packaging Material Factory Major Business

10.4.3 Changzhou Ouya Packaging Material Factory Residential Flooring Underlayment Product and Services

10.4.4 Changzhou Ouya Packaging Material Factory Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 Changzhou Ouya Packaging Material Factory Recent Developments/Updates

10.4.6 Changzhou Ouya Packaging Material Factory Competitive Strengths &

Weaknesses

10.5 Changzhou Xindingxin New Material Technology

10.5.1 Changzhou Xindingxin New Material Technology Details

10.5.2 Changzhou Xindingxin New Material Technology Major Business

10.5.3 Changzhou Xindingxin New Material Technology Residential Flooring Underlayment Product and Services

10.5.4 Changzhou Xindingxin New Material Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 Changzhou Xindingxin New Material Technology Recent Developments/Updates

10.5.6 Changzhou Xindingxin New Material Technology Competitive Strengths & Weaknesses

10.6 Changzhou Haichen Decoration Material

10.6.1 Changzhou Haichen Decoration Material Details

10.6.2 Changzhou Haichen Decoration Material Major Business

10.6.3 Changzhou Haichen Decoration Material Residential Flooring Underlayment Product and Services

10.6.4 Changzhou Haichen Decoration Material Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.6.5 Changzhou Haichen Decoration Material Recent Developments/Updates

10.6.6 Changzhou Haichen Decoration Material Competitive Strengths & Weaknesses

10.7 Zhangjiagang Bolilong Packing Material

10.7.1 Zhangjiagang Bolilong Packing Material Details

10.7.2 Zhangjiagang Bolilong Packing Material Major Business

10.7.3 Zhangjiagang Bolilong Packing Material Residential Flooring Underlayment Product and Services

10.7.4 Zhangjiagang Bolilong Packing Material Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.7.5 Zhangjiagang Bolilong Packing Material Recent Developments/Updates

10.7.6 Zhangjiagang Bolilong Packing Material Competitive Strengths & Weaknesses

10.8 Jiangsu Zhongxinhe New Material Technology

10.8.1 Jiangsu Zhongxinhe New Material Technology Details

10.8.2 Jiangsu Zhongxinhe New Material Technology Major Business

10.8.3 Jiangsu Zhongxinhe New Material Technology Residential Flooring Underlayment Product and Services

10.8.4 Jiangsu Zhongxinhe New Material Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.8.5 Jiangsu Zhongxinhe New Material Technology Recent Developments/Updates

10.8.6 Jiangsu Zhongxinhe New Material Technology Competitive Strengths & Weaknesses

10.9 Changzhou New Top Star New Material Technology

10.9.1 Changzhou New Top Star New Material Technology Details

10.9.2 Changzhou New Top Star New Material Technology Major Business

10.9.3 Changzhou New Top Star New Material Technology Residential Flooring Underlayment Product and Services

10.9.4 Changzhou New Top Star New Material Technology Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.9.5 Changzhou New Top Star New Material Technology Recent Developments/Updates

10.9.6 Changzhou New Top Star New Material Technology Competitive Strengths & Weaknesses

10.10 Zhejiang Xinhengtai New Material

10.10.1 Zhejiang Xinhengtai New Material Details

10.10.2 Zhejiang Xinhengtai New Material Major Business

10.10.3 Zhejiang Xinhengtai New Material Residential Flooring Underlayment Product and Services

10.10.4 Zhejiang Xinhengtai New Material Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 Zhejiang Xinhengtai New Material Recent Developments/Updates

10.10.6 Zhejiang Xinhengtai New Material Competitive Strengths & Weaknesses

10.11 USG Corporation

10.11.1 USG Corporation Details

10.11.2 USG Corporation Major Business

10.11.3 USG Corporation Residential Flooring Underlayment Product and Services

10.11.4 USG Corporation Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 USG Corporation Recent Developments/Updates

10.11.6 USG Corporation Competitive Strengths & Weaknesses

10.12 James Hardie Industries

10.12.1 James Hardie Industries Details

10.12.2 James Hardie Industries Major Business

10.12.3 James Hardie Industries Residential Flooring Underlayment Product and Services

10.12.4 James Hardie Industries Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 James Hardie Industries Recent Developments/Updates

10.12.6 James Hardie Industries Competitive Strengths & Weaknesses

10.13 National Gypsum Company

10.13.1 National Gypsum Company Details

10.13.2 National Gypsum Company Major Business

10.13.3 National Gypsum Company Residential Flooring Underlayment Product and Services

10.13.4 National Gypsum Company Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 National Gypsum Company Recent Developments/Updates

10.13.6 National Gypsum Company Competitive Strengths & Weaknesses

10.14 Schluter-Systems

10.14.1 Schluter-Systems Details

- 10.14.2 Schluter-Systems Major Business
- 10.14.3 Schluter-Systems Residential Flooring Underlayment Product and Services
- 10.14.4 Schluter-Systems Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.14.5 Schluter-Systems Recent Developments/Updates
- 10.14.6 Schluter-Systems Competitive Strengths & Weaknesses
- 10.15 Custom Building Products
 - 10.15.1 Custom Building Products Details
 - 10.15.2 Custom Building Products Major Business
 - 10.15.3 Custom Building Products Residential Flooring Underlayment Product and Services
 - 10.15.4 Custom Building Products Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.15.5 Custom Building Products Recent Developments/Updates
 - 10.15.6 Custom Building Products Competitive Strengths & Weaknesses
- 10.16 QEP
 - 10.16.1 QEP Details
 - 10.16.2 QEP Major Business
 - 10.16.3 QEP Residential Flooring Underlayment Product and Services
 - 10.16.4 QEP Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.16.5 QEP Recent Developments/Updates
 - 10.16.6 QEP Competitive Strengths & Weaknesses
- 10.17 MP Global Products
 - 10.17.1 MP Global Products Details
 - 10.17.2 MP Global Products Major Business
 - 10.17.3 MP Global Products Residential Flooring Underlayment Product and Services
 - 10.17.4 MP Global Products Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 MP Global Products Recent Developments/Updates
 - 10.17.6 MP Global Products Competitive Strengths & Weaknesses
- 10.18 Amorim Cork Solutions
 - 10.18.1 Amorim Cork Solutions Details
 - 10.18.2 Amorim Cork Solutions Major Business
 - 10.18.3 Amorim Cork Solutions Residential Flooring Underlayment Product and Services
 - 10.18.4 Amorim Cork Solutions Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.18.5 Amorim Cork Solutions Recent Developments/Updates

- 10.18.6 Amorim Cork Solutions Competitive Strengths & Weaknesses
- 10.19 Manton Cork
 - 10.19.1 Manton Cork Details
 - 10.19.2 Manton Cork Major Business
 - 10.19.3 Manton Cork Residential Flooring Underlayment Product and Services
 - 10.19.4 Manton Cork Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.19.5 Manton Cork Recent Developments/Updates
 - 10.19.6 Manton Cork Competitive Strengths & Weaknesses
- 10.20 Pak-Lite
 - 10.20.1 Pak-Lite Details
 - 10.20.2 Pak-Lite Major Business
 - 10.20.3 Pak-Lite Residential Flooring Underlayment Product and Services
 - 10.20.4 Pak-Lite Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.20.5 Pak-Lite Recent Developments/Updates
 - 10.20.6 Pak-Lite Competitive Strengths & Weaknesses
- 10.21 Sealed Air
 - 10.21.1 Sealed Air Details
 - 10.21.2 Sealed Air Major Business
 - 10.21.3 Sealed Air Residential Flooring Underlayment Product and Services
 - 10.21.4 Sealed Air Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.21.5 Sealed Air Recent Developments/Updates
 - 10.21.6 Sealed Air Competitive Strengths & Weaknesses
- 10.22 MAPEI
 - 10.22.1 MAPEI Details
 - 10.22.2 MAPEI Major Business
 - 10.22.3 MAPEI Residential Flooring Underlayment Product and Services
 - 10.22.4 MAPEI Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.22.5 MAPEI Recent Developments/Updates
 - 10.22.6 MAPEI Competitive Strengths & Weaknesses
- 10.23 ARDEX
 - 10.23.1 ARDEX Details
 - 10.23.2 ARDEX Major Business
 - 10.23.3 ARDEX Residential Flooring Underlayment Product and Services
 - 10.23.4 ARDEX Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.23.5 ARDEX Recent Developments/Updates
- 10.23.6 ARDEX Competitive Strengths & Weaknesses
- 10.24 LATICRETE
 - 10.24.1 LATICRETE Details
 - 10.24.2 LATICRETE Major Business
 - 10.24.3 LATICRETE Residential Flooring Underlayment Product and Services
 - 10.24.4 LATICRETE Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.24.5 LATICRETE Recent Developments/Updates
 - 10.24.6 LATICRETE Competitive Strengths & Weaknesses
- 10.25 UZIN UTZ
 - 10.25.1 UZIN UTZ Details
 - 10.25.2 UZIN UTZ Major Business
 - 10.25.3 UZIN UTZ Residential Flooring Underlayment Product and Services
 - 10.25.4 UZIN UTZ Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.25.5 UZIN UTZ Recent Developments/Updates
 - 10.25.6 UZIN UTZ Competitive Strengths & Weaknesses
- 10.26 REGUPOL
 - 10.26.1 REGUPOL Details
 - 10.26.2 REGUPOL Major Business
 - 10.26.3 REGUPOL Residential Flooring Underlayment Product and Services
 - 10.26.4 REGUPOL Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.26.5 REGUPOL Recent Developments/Updates
 - 10.26.6 REGUPOL Competitive Strengths & Weaknesses
- 10.27 Ecore
 - 10.27.1 Ecore Details
 - 10.27.2 Ecore Major Business
 - 10.27.3 Ecore Residential Flooring Underlayment Product and Services
 - 10.27.4 Ecore Residential Flooring Underlayment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.27.5 Ecore Recent Developments/Updates
 - 10.27.6 Ecore Competitive Strengths & Weaknesses
- 10.28 Dura Underlayment
 - 10.28.1 Dura Underlayment Details
 - 10.28.2 Dura Underlayment Major Business
 - 10.28.3 Dura Underlayment Residential Flooring Underlayment Product and Services
 - 10.28.4 Dura Underlayment Residential Flooring Underlayment Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.28.5 Dura Underlayment Recent Developments/Updates

10.28.6 Dura Underlayment Competitive Strengths & Weaknesses

10.29 Maxxon Corporation

10.29.1 Maxxon Corporation Details

10.29.2 Maxxon Corporation Major Business

10.29.3 Maxxon Corporation Residential Flooring Underlayment Product and Services

10.29.4 Maxxon Corporation Residential Flooring Underlayment Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.29.5 Maxxon Corporation Recent Developments/Updates

10.29.6 Maxxon Corporation Competitive Strengths & Weaknesses

10.30 Hacker Industries

10.30.1 Hacker Industries Details

10.30.2 Hacker Industries Major Business

10.30.3 Hacker Industries Residential Flooring Underlayment Product and Services

10.30.4 Hacker Industries Residential Flooring Underlayment Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.30.5 Hacker Industries Recent Developments/Updates

10.30.6 Hacker Industries Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Residential Flooring Underlayment Industry Chain

11.2 Residential Flooring Underlayment Upstream Analysis

11.2.1 Residential Flooring Underlayment Core Raw Materials

11.2.2 Main Manufacturers of Residential Flooring Underlayment Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 Residential Flooring Underlayment Production Mode

11.6 Residential Flooring Underlayment Procurement Model

11.7 Residential Flooring Underlayment Industry Sales Model and Sales Channels

11.7.1 Residential Flooring Underlayment Sales Model

11.7.2 Residential Flooring Underlayment Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Residential Flooring Underlayment Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Residential Flooring Underlayment Production Value by Region (2021-2026) & (USD Million)

Table 3. World Residential Flooring Underlayment Production Value by Region (2027-2032) & (USD Million)

Table 4. World Residential Flooring Underlayment Production Value Market Share by Region (2021-2026)

Table 5. World Residential Flooring Underlayment Production Value Market Share by Region (2027-2032)

Table 6. World Residential Flooring Underlayment Production by Region (2021-2026) & (K Sqm)

Table 7. World Residential Flooring Underlayment Production by Region (2027-2032) & (K Sqm)

Table 8. World Residential Flooring Underlayment Production Market Share by Region (2021-2026)

Table 9. World Residential Flooring Underlayment Production Market Share by Region (2027-2032)

Table 10. World Residential Flooring Underlayment Average Price by Region (2021-2026) & (US\$/Sq m)

Table 11. World Residential Flooring Underlayment Average Price by Region (2027-2032) & (US\$/Sq m)

Table 12. Residential Flooring Underlayment Major Market Trends

Table 13. World Residential Flooring Underlayment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Sqm)

Table 14. World Residential Flooring Underlayment Consumption by Region (2021-2026) & (K Sqm)

Table 15. World Residential Flooring Underlayment Consumption Forecast by Region (2027-2032) & (K Sqm)

Table 16. World Residential Flooring Underlayment Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Residential Flooring Underlayment Producers in 2025

Table 18. World Residential Flooring Underlayment Production by Manufacturer (2021-2026) & (K Sqm)

Table 19. Production Market Share of Key Residential Flooring Underlayment Producers in 2025

Table 20. World Residential Flooring Underlayment Average Price by Manufacturer (2021-2026) & (US\$/Sq m)

Table 21. Global Residential Flooring Underlayment Company Evaluation Quadrant

Table 22. World Residential Flooring Underlayment Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Residential Flooring Underlayment Production Site of Key Manufacturer

Table 24. Residential Flooring Underlayment Market: Company Product Type Footprint

Table 25. Residential Flooring Underlayment Market: Company Product Application Footprint

Table 26. Residential Flooring Underlayment Competitive Factors

Table 27. Residential Flooring Underlayment New Entrant and Capacity Expansion Plans

Table 28. Residential Flooring Underlayment Mergers & Acquisitions Activity

Table 29. United States VS China Residential Flooring Underlayment Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Residential Flooring Underlayment Production Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 31. United States VS China Residential Flooring Underlayment Consumption Comparison, (2021 & 2025 & 2032) & (K Sqm)

Table 32. United States Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Residential Flooring Underlayment Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Residential Flooring Underlayment Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Residential Flooring Underlayment Production (2021-2026) & (K Sqm)

Table 36. United States Based Manufacturers Residential Flooring Underlayment Production Market Share (2021-2026)

Table 37. China Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Residential Flooring Underlayment Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Residential Flooring Underlayment Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Residential Flooring Underlayment Production,

(2021-2026) & (K Sqm)

Table 41. China Based Manufacturers Residential Flooring Underlayment Production Market Share (2021-2026)

Table 42. Rest of World Based Residential Flooring Underlayment Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Residential Flooring Underlayment Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Residential Flooring Underlayment Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Residential Flooring Underlayment Production, (2021-2026) & (K Sqm)

Table 46. Rest of World Based Manufacturers Residential Flooring Underlayment Production Market Share (2021-2026)

Table 47. World Residential Flooring Underlayment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Residential Flooring Underlayment Production by Type (2021-2026) & (K Sqm)

Table 49. World Residential Flooring Underlayment Production by Type (2027-2032) & (K Sqm)

Table 50. World Residential Flooring Underlayment Production Value by Type (2021-2026) & (USD Million)

Table 51. World Residential Flooring Underlayment Production Value by Type (2027-2032) & (USD Million)

Table 52. World Residential Flooring Underlayment Average Price by Type (2021-2026) & (US\$/Sq m)

Table 53. World Residential Flooring Underlayment Average Price by Type (2027-2032) & (US\$/Sq m)

Table 54. World Residential Flooring Underlayment Production Value by Technology or Integration Level, (USD Million), 2021 & 2025 & 2032

Table 55. World Residential Flooring Underlayment Production by Technology or Integration Level (2021-2026) & (K Sqm)

Table 56. World Residential Flooring Underlayment Production by Technology or Integration Level (2027-2032) & (K Sqm)

Table 57. World Residential Flooring Underlayment Production Value by Technology or Integration Level (2021-2026) & (USD Million)

Table 58. World Residential Flooring Underlayment Production Value by Technology or Integration Level (2027-2032) & (USD Million)

Table 59. World Residential Flooring Underlayment Average Price by Technology or Integration Level (2021-2026) & (US\$/Sq m)

Table 60. World Residential Flooring Underlayment Average Price by Technology or Integration Level (2027-2032) & (US\$/Sq m)

Table 61. World Residential Flooring Underlayment Production Value by Form, (USD Million), 2021 & 2025 & 2032

Table 62. World Residential Flooring Underlayment Production by Form (2021-2026) & (K Sqm)

Table 63. World Residential Flooring Underlayment Production by Form (2027-2032) & (K Sqm)

Table 64. World Residential Flooring Underlayment Production Value by Form (2021-2026) & (USD Million)

Table 65. World Residential Flooring Underlayment Production Value by Form (2027-2032) & (USD Million)

Table 66. World Residential Flooring Underlayment Average Price by Form (2021-2026) & (US\$/Sq m)

Table 67. World Residential Flooring Underlayment Average Price by Form (2027-2032) & (US\$/Sq m)

Table 68. World Residential Flooring Underlayment Production Value by Product Thickness, (USD Million), 2021 & 2025 & 2032

Table 69. World Residential Flooring Underlayment Production by Product Thickness (2021-2026) & (K Sqm)

Table 70. World Residential Flooring Underlayment Production by Product Thickness (2027-2032) & (K Sqm)

Table 71. World Residential Flooring Underlayment Production Value by Product Thickness (2021-2026) & (USD Million)

Table 72. World Residential Flooring Underlayment Production Value by Product Thickness (2027-2032) & (USD Million)

Table 73. World Residential Flooring Underlayment Average Price by Product Thickness (2021-2026) & (US\$/Sq m)

Table 74. World Residential Flooring Underlayment Average Price by Product Thickness (2027-2032) & (US\$/Sq m)

Table 75. World Residential Flooring Underlayment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Residential Flooring Underlayment Production by Application (2021-2026) & (K Sqm)

Table 77. World Residential Flooring Underlayment Production by Application (2027-2032) & (K Sqm)

Table 78. World Residential Flooring Underlayment Production Value by Application (2021-2026) & (USD Million)

Table 79. World Residential Flooring Underlayment Production Value by Application

(2027-2032) & (USD Million)

Table 80. World Residential Flooring Underlayment Average Price by Application (2021-2026) & (US\$/Sq m)

Table 81. World Residential Flooring Underlayment Average Price by Application (2027-2032) & (US\$/Sq m)

Table 82. Hubei Xiangyuan New Material Technology Basic Information, Manufacturing Base and Competitors

Table 83. Hubei Xiangyuan New Material Technology Major Business

Table 84. Hubei Xiangyuan New Material Technology Residential Flooring Underlayment Product and Services

Table 85. Hubei Xiangyuan New Material Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Hubei Xiangyuan New Material Technology Recent Developments/Updates

Table 87. Hubei Xiangyuan New Material Technology Competitive Strengths & Weaknesses

Table 88. Zhejiang Runyang New Material Technology Basic Information, Manufacturing Base and Competitors

Table 89. Zhejiang Runyang New Material Technology Major Business

Table 90. Zhejiang Runyang New Material Technology Residential Flooring Underlayment Product and Services

Table 91. Zhejiang Runyang New Material Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Zhejiang Runyang New Material Technology Recent Developments/Updates

Table 93. Zhejiang Runyang New Material Technology Competitive Strengths & Weaknesses

Table 94. Shenzhen CYG TEFA Technology Basic Information, Manufacturing Base and Competitors

Table 95. Shenzhen CYG TEFA Technology Major Business

Table 96. Shenzhen CYG TEFA Technology Residential Flooring Underlayment Product and Services

Table 97. Shenzhen CYG TEFA Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Shenzhen CYG TEFA Technology Recent Developments/Updates

Table 99. Shenzhen CYG TEFA Technology Competitive Strengths & Weaknesses

Table 100. Changzhou Ouya Packaging Material Factory Basic Information, Manufacturing Base and Competitors

- Table 101. Changzhou Ouya Packaging Material Factory Major Business
- Table 102. Changzhou Ouya Packaging Material Factory Residential Flooring Underlayment Product and Services
- Table 103. Changzhou Ouya Packaging Material Factory Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 104. Changzhou Ouya Packaging Material Factory Recent Developments/Updates
- Table 105. Changzhou Ouya Packaging Material Factory Competitive Strengths & Weaknesses
- Table 106. Changzhou Xindingxin New Material Technology Basic Information, Manufacturing Base and Competitors
- Table 107. Changzhou Xindingxin New Material Technology Major Business
- Table 108. Changzhou Xindingxin New Material Technology Residential Flooring Underlayment Product and Services
- Table 109. Changzhou Xindingxin New Material Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 110. Changzhou Xindingxin New Material Technology Recent Developments/Updates
- Table 111. Changzhou Xindingxin New Material Technology Competitive Strengths & Weaknesses
- Table 112. Changzhou Haichen Decoration Material Basic Information, Manufacturing Base and Competitors
- Table 113. Changzhou Haichen Decoration Material Major Business
- Table 114. Changzhou Haichen Decoration Material Residential Flooring Underlayment Product and Services
- Table 115. Changzhou Haichen Decoration Material Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 116. Changzhou Haichen Decoration Material Recent Developments/Updates
- Table 117. Changzhou Haichen Decoration Material Competitive Strengths & Weaknesses
- Table 118. Zhangjiagang Bolilong Packing Material Basic Information, Manufacturing Base and Competitors
- Table 119. Zhangjiagang Bolilong Packing Material Major Business
- Table 120. Zhangjiagang Bolilong Packing Material Residential Flooring Underlayment Product and Services
- Table 121. Zhangjiagang Bolilong Packing Material Residential Flooring Underlayment

Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Zhangjiagang Bolilong Packing Material Recent Developments/Updates

Table 123. Zhangjiagang Bolilong Packing Material Competitive Strengths & Weaknesses

Table 124. Jiangsu Zhongxinhe New Material Technology Basic Information, Manufacturing Base and Competitors

Table 125. Jiangsu Zhongxinhe New Material Technology Major Business

Table 126. Jiangsu Zhongxinhe New Material Technology Residential Flooring Underlayment Product and Services

Table 127. Jiangsu Zhongxinhe New Material Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Jiangsu Zhongxinhe New Material Technology Recent Developments/Updates

Table 129. Jiangsu Zhongxinhe New Material Technology Competitive Strengths & Weaknesses

Table 130. Changzhou New Top Star New Material Technology Basic Information, Manufacturing Base and Competitors

Table 131. Changzhou New Top Star New Material Technology Major Business

Table 132. Changzhou New Top Star New Material Technology Residential Flooring Underlayment Product and Services

Table 133. Changzhou New Top Star New Material Technology Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Changzhou New Top Star New Material Technology Recent Developments/Updates

Table 135. Changzhou New Top Star New Material Technology Competitive Strengths & Weaknesses

Table 136. Zhejiang Xinhengtai New Material Basic Information, Manufacturing Base and Competitors

Table 137. Zhejiang Xinhengtai New Material Major Business

Table 138. Zhejiang Xinhengtai New Material Residential Flooring Underlayment Product and Services

Table 139. Zhejiang Xinhengtai New Material Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Zhejiang Xinhengtai New Material Recent Developments/Updates

Table 141. Zhejiang Xinhengtai New Material Competitive Strengths & Weaknesses

Table 142. USG Corporation Basic Information, Manufacturing Base and Competitors

Table 143. USG Corporation Major Business

Table 144. USG Corporation Residential Flooring Underlayment Product and Services

Table 145. USG Corporation Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. USG Corporation Recent Developments/Updates

Table 147. USG Corporation Competitive Strengths & Weaknesses

Table 148. James Hardie Industries Basic Information, Manufacturing Base and Competitors

Table 149. James Hardie Industries Major Business

Table 150. James Hardie Industries Residential Flooring Underlayment Product and Services

Table 151. James Hardie Industries Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. James Hardie Industries Recent Developments/Updates

Table 153. James Hardie Industries Competitive Strengths & Weaknesses

Table 154. National Gypsum Company Basic Information, Manufacturing Base and Competitors

Table 155. National Gypsum Company Major Business

Table 156. National Gypsum Company Residential Flooring Underlayment Product and Services

Table 157. National Gypsum Company Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. National Gypsum Company Recent Developments/Updates

Table 159. National Gypsum Company Competitive Strengths & Weaknesses

Table 160. Schluter-Systems Basic Information, Manufacturing Base and Competitors

Table 161. Schluter-Systems Major Business

Table 162. Schluter-Systems Residential Flooring Underlayment Product and Services

Table 163. Schluter-Systems Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Schluter-Systems Recent Developments/Updates

Table 165. Schluter-Systems Competitive Strengths & Weaknesses

Table 166. Custom Building Products Basic Information, Manufacturing Base and Competitors

Table 167. Custom Building Products Major Business

Table 168. Custom Building Products Residential Flooring Underlayment Product and Services

Table 169. Custom Building Products Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Custom Building Products Recent Developments/Updates

Table 171. Custom Building Products Competitive Strengths & Weaknesses

Table 172. QEP Basic Information, Manufacturing Base and Competitors

Table 173. QEP Major Business

Table 174. QEP Residential Flooring Underlayment Product and Services

Table 175. QEP Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. QEP Recent Developments/Updates

Table 177. QEP Competitive Strengths & Weaknesses

Table 178. MP Global Products Basic Information, Manufacturing Base and Competitors

Table 179. MP Global Products Major Business

Table 180. MP Global Products Residential Flooring Underlayment Product and Services

Table 181. MP Global Products Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. MP Global Products Recent Developments/Updates

Table 183. MP Global Products Competitive Strengths & Weaknesses

Table 184. Amorim Cork Solutions Basic Information, Manufacturing Base and Competitors

Table 185. Amorim Cork Solutions Major Business

Table 186. Amorim Cork Solutions Residential Flooring Underlayment Product and Services

Table 187. Amorim Cork Solutions Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Amorim Cork Solutions Recent Developments/Updates

Table 189. Amorim Cork Solutions Competitive Strengths & Weaknesses

Table 190. Manton Cork Basic Information, Manufacturing Base and Competitors

Table 191. Manton Cork Major Business

Table 192. Manton Cork Residential Flooring Underlayment Product and Services

Table 193. Manton Cork Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 194. Manton Cork Recent Developments/Updates
- Table 195. Manton Cork Competitive Strengths & Weaknesses
- Table 196. Pak-Lite Basic Information, Manufacturing Base and Competitors
- Table 197. Pak-Lite Major Business
- Table 198. Pak-Lite Residential Flooring Underlayment Product and Services
- Table 199. Pak-Lite Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 200. Pak-Lite Recent Developments/Updates
- Table 201. Pak-Lite Competitive Strengths & Weaknesses
- Table 202. Sealed Air Basic Information, Manufacturing Base and Competitors
- Table 203. Sealed Air Major Business
- Table 204. Sealed Air Residential Flooring Underlayment Product and Services
- Table 205. Sealed Air Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 206. Sealed Air Recent Developments/Updates
- Table 207. Sealed Air Competitive Strengths & Weaknesses
- Table 208. MAPEI Basic Information, Manufacturing Base and Competitors
- Table 209. MAPEI Major Business
- Table 210. MAPEI Residential Flooring Underlayment Product and Services
- Table 211. MAPEI Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 212. MAPEI Recent Developments/Updates
- Table 213. MAPEI Competitive Strengths & Weaknesses
- Table 214. ARDEX Basic Information, Manufacturing Base and Competitors
- Table 215. ARDEX Major Business
- Table 216. ARDEX Residential Flooring Underlayment Product and Services
- Table 217. ARDEX Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 218. ARDEX Recent Developments/Updates
- Table 219. ARDEX Competitive Strengths & Weaknesses
- Table 220. LATICRETE Basic Information, Manufacturing Base and Competitors
- Table 221. LATICRETE Major Business
- Table 222. LATICRETE Residential Flooring Underlayment Product and Services
- Table 223. LATICRETE Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 224. LATICRETE Recent Developments/Updates

Table 225. LATICRETE Competitive Strengths & Weaknesses

Table 226. UZIN UTZ Basic Information, Manufacturing Base and Competitors

Table 227. UZIN UTZ Major Business

Table 228. UZIN UTZ Residential Flooring Underlayment Product and Services

Table 229. UZIN UTZ Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 230. UZIN UTZ Recent Developments/Updates

Table 231. UZIN UTZ Competitive Strengths & Weaknesses

Table 232. REGUPOL Basic Information, Manufacturing Base and Competitors

Table 233. REGUPOL Major Business

Table 234. REGUPOL Residential Flooring Underlayment Product and Services

Table 235. REGUPOL Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 236. REGUPOL Recent Developments/Updates

Table 237. REGUPOL Competitive Strengths & Weaknesses

Table 238. Ecore Basic Information, Manufacturing Base and Competitors

Table 239. Ecore Major Business

Table 240. Ecore Residential Flooring Underlayment Product and Services

Table 241. Ecore Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 242. Ecore Recent Developments/Updates

Table 243. Ecore Competitive Strengths & Weaknesses

Table 244. Dura Underlayment Basic Information, Manufacturing Base and Competitors

Table 245. Dura Underlayment Major Business

Table 246. Dura Underlayment Residential Flooring Underlayment Product and Services

Table 247. Dura Underlayment Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 248. Dura Underlayment Recent Developments/Updates

Table 249. Dura Underlayment Competitive Strengths & Weaknesses

Table 250. Maxxon Corporation Basic Information, Manufacturing Base and Competitors

Table 251. Maxxon Corporation Major Business

Table 252. Maxxon Corporation Residential Flooring Underlayment Product and Services

Table 253. Maxxon Corporation Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 254. Maxxon Corporation Recent Developments/Updates

Table 255. Maxxon Corporation Competitive Strengths & Weaknesses

Table 256. Hacker Industries Basic Information, Manufacturing Base and Competitors

Table 257. Hacker Industries Major Business

Table 258. Hacker Industries Residential Flooring Underlayment Product and Services

Table 259. Hacker Industries Residential Flooring Underlayment Production (K Sqm), Price (US\$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 260. Hacker Industries Recent Developments/Updates

Table 261. Hacker Industries Competitive Strengths & Weaknesses

Table 262. Global Key Players of Residential Flooring Underlayment Upstream (Raw Materials)

Table 263. Global Residential Flooring Underlayment Typical Customers

Table 264. Residential Flooring Underlayment Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Residential Flooring Underlayment Picture

Figure 2. World Residential Flooring Underlayment Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Residential Flooring Underlayment Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Residential Flooring Underlayment Production (2021-2032) & (K Sqm)

Figure 5. World Residential Flooring Underlayment Average Price (2021-2032) & (US\$/Sq m)

Figure 6. World Residential Flooring Underlayment Production Value Market Share by Region (2021-2032)

Figure 7. World Residential Flooring Underlayment Production Market Share by Region (2021-2032)

Figure 8. North America Residential Flooring Underlayment Production (2021-2032) & (K Sqm)

Figure 9. Europe Residential Flooring Underlayment Production (2021-2032) & (K Sqm)

Figure 10. China Residential Flooring Underlayment Production (2021-2032) & (K Sqm)

Figure 11. Japan Residential Flooring Underlayment Production (2021-2032) & (K Sqm)

Figure 12. Residential Flooring Underlayment Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 15. World Residential Flooring Underlayment Consumption Market Share by Region (2021-2032)

Figure 16. United States Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 17. China Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 18. Europe Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 19. Japan Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 20. South Korea Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 21. ASEAN Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 22. India Residential Flooring Underlayment Consumption (2021-2032) & (K Sqm)

Figure 23. Producer Shipments of Residential Flooring Underlayment by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Residential Flooring Underlayment Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Residential Flooring Underlayment Markets in 2025

Figure 26. United States VS China: Residential Flooring Underlayment Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Residential Flooring Underlayment Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Residential Flooring Underlayment Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Residential Flooring Underlayment Production Market Share 2025

Figure 30. China Based Manufacturers Residential Flooring Underlayment Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Residential Flooring Underlayment Production Market Share 2025

Figure 32. World Residential Flooring Underlayment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Residential Flooring Underlayment Production Value Market Share by Type in 2025

Figure 34. Foam

Figure 35. Cork

Figure 36. Rubber

Figure 37. Others

Figure 38. World Residential Flooring Underlayment Production Market Share by Type (2021-2032)

Figure 39. World Residential Flooring Underlayment Production Value Market Share by Type (2021-2032)

Figure 40. World Residential Flooring Underlayment Average Price by Type (2021-2032) & (US\$/Sq m)

Figure 41. World Residential Flooring Underlayment Production Value by Technology or Integration Level, (USD Million), 2021 & 2025 & 2032

Figure 42. World Residential Flooring Underlayment Production Value Market Share by Technology or Integration Level in 2025

Figure 43. Single-Function Underlay

Figure 44. Integrated Underlay

Figure 45. Smart Underlay

Figure 46. World Residential Flooring Underlayment Production Market Share by Technology or Integration Level (2021-2032)

Figure 47. World Residential Flooring Underlayment Production Value Market Share by Technology or Integration Level (2021-2032)

Figure 48. World Residential Flooring Underlayment Average Price by Technology or Integration Level (2021-2032) & (US\$/Sq m)

Figure 49. World Residential Flooring Underlayment Production Value by Form, (USD Million), 2021 & 2025 & 2032

Figure 50. World Residential Flooring Underlayment Production Value Market Share by Form in 2025

Figure 51. Roll Underlayment

Figure 52. Panel Underlayment

Figure 53. Others

Figure 54. World Residential Flooring Underlayment Production Market Share by Form (2021-2032)

Figure 55. World Residential Flooring Underlayment Production Value Market Share by Form (2021-2032)

Figure 56. World Residential Flooring Underlayment Average Price by Form (2021-2032) & (US\$/Sq m)

Figure 57. World Residential Flooring Underlayment Production Value by Product Thickness, (USD Million), 2021 & 2025 & 2032

Figure 58. World Residential Flooring Underlayment Production Value Market Share by Product Thickness in 2025

Figure 59. Thin Type

Figure 60. Standard Type

Figure 61. Thick or Special Type

Figure 62. World Residential Flooring Underlayment Production Market Share by Product Thickness (2021-2032)

Figure 63. World Residential Flooring Underlayment Production Value Market Share by Product Thickness (2021-2032)

Figure 64. World Residential Flooring Underlayment Average Price by Product Thickness (2021-2032) & (US\$/Sq m)

Figure 65. World Residential Flooring Underlayment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 66. World Residential Flooring Underlayment Production Value Market Share by Application in 2025

Figure 67. Laminate Flooring

Figure 68. Hardwood Flooring

Figure 69. Tile Flooring

Figure 70. Others

Figure 71. World Residential Flooring Underlayment Production Market Share by Application (2021-2032)

Figure 72. World Residential Flooring Underlayment Production Value Market Share by Application (2021-2032)

Figure 73. World Residential Flooring Underlayment Average Price by Application (2021-2032) & (US\$/Sq m)

Figure 74. Residential Flooring Underlayment Industry Chain

Figure 75. Residential Flooring Underlayment Procurement Model

Figure 76. Residential Flooring Underlayment Sales Model

Figure 77. Residential Flooring Underlayment Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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