

01 THE NEED FOR RESEARCH

THE NATIONAL Mission on Bamboo Applications (NMBA), a mission launched by the Department of Science and Technology, has a focused mandate to develop industrial applications for bamboo by assisting in the funding, technology transfer, promotion and propagation aspects of the sector. The value-added bamboo products industry is being explored as an answer to the problems of sustainable livelihoods, employment generation and environmental concerns, particularly in the economically weaker states of the economy. One of the major applications of bamboo would be as a wood substitute for downstream products such as bamboo board, flooring, furniture, bamboo blinds and roofing sheets.

The technology for bamboo flooring has been stabilised and is now available for commercial production.

1.1 THE PRODUCT

Bamboo flooring tiles come in a plank dimension of 920 x 92 mm and thicknesses of 12, 15 and 18 mm.

A tongue and groove mechanism is used to instal the tiles, contributing to easy and quick installation. The mechanism enables easy removal if required when replacing tiles. The tiles have vertical and horizontal grains and come in natural and darker (carbonised) shades. There is a minimal colour variation in the planks due to bamboo's inherent nature. This does not affect the look; rather, it enhances the appearance of the flooring.

1.1.1 The Raw Material

On an average, the bamboo culms used for flooring take 3–4 years to grow. Being highly regenerative, new bamboo culms grow every year after the initial gestation period mentioned. Bamboo can be cultivated

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on most lands without difficulty, and occurs in most regions of the country except in the upper reaches of the Himalayan region and the desert regions of Rajasthan and Gujarat. The North East in particular has abundant supply of bamboo and would be a suitable location for establishment of a unit.

1.2 THE SCOPE OF THE STUDY

The scope of this study was to understand the flooring market in India, assess the need gaps, estimate the market opportunity for bamboo flooring, and suggest a market entry strategy.

1.3 THE APPROACH OF THE STUDY

The flooring industry in India is unorganised, with the exception of the ceramic sector which has seen the entry of organised corporate players.

The study was conducted in two phases. In the first phase, a secondary study was conducted to understand and review the size of the flooring market. This was followed by primary research that was undertaken to understand the structure of the market, product types, the supply chain, consumer preferences, usage and attitudes, with a total sample size of 960 respondents. These respondents were drawn from identified constituents in markets like Delhi, Mumbai, Indore and Ludhiana. This coverage helped understand the behaviour of both metro and non-metro markets.

The research involved interviews with leading architects, builders, dealers, institutional customers – hotels, resorts, restaurants, retail outlets, and end-users such as residential consumers. Interviews with key executives of companies that manufacture and/or import flooring products helped to get an insight into the prospects for the industry. A mystery shopping exercise was also undertaken, with suppliers being invited to an office location to bid for flooring requirements.

The research design and questionnaire were formalised after an initial round of market visits and meetings with product manufacturers and dealers.

Some of the findings of the first phase of the study were as follows.

- The flooring industry in India is growing rapidly. This growth is being fuelled largely by the growth of the retail sector in both metro and non-metro cities.
- The flooring market is dominated by traditional products such as marble and mosaic. However, during the last few years, new flooring options – such as laminate flooring, vitrified tiles and hard wood – have found acceptance. These find favour with both institutional and household consumers.
- The laminate flooring market is the fastest growing sector in this market.