



The infrastructure for the **AI economy**

INSIGHT BRIEF

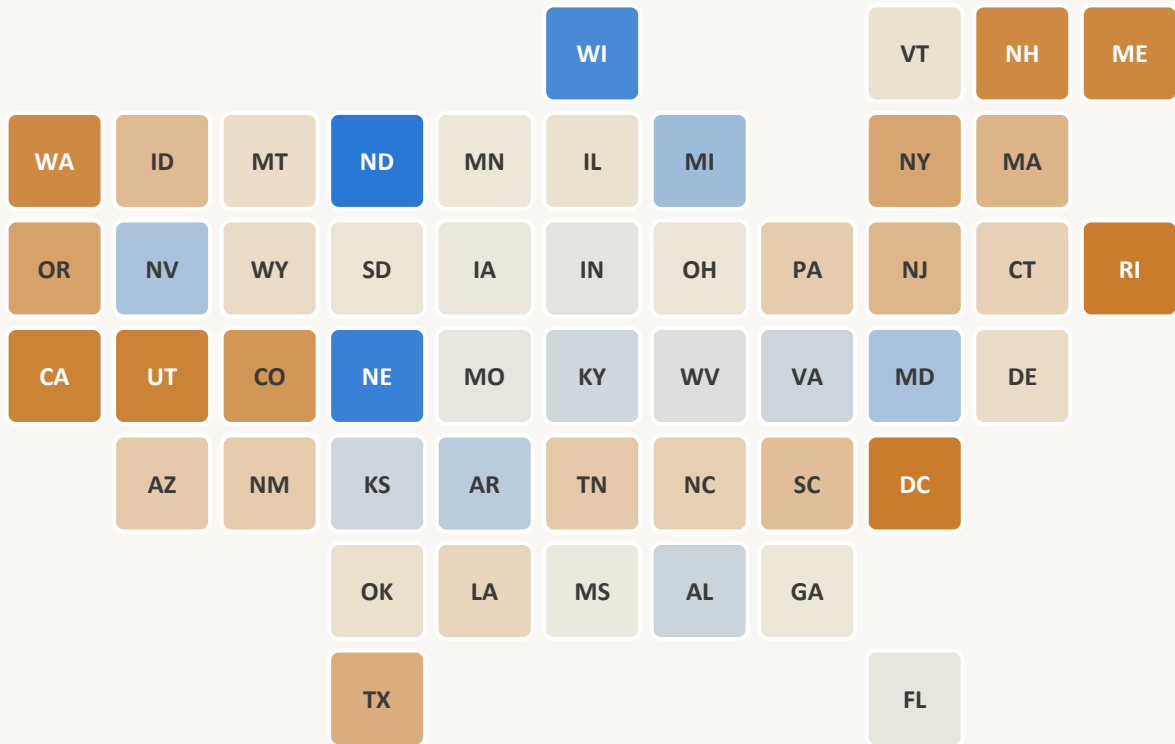
REGIONAL DEMAND · JULY 2026

The American Floor Map

Where vinyl, engineered wood, and solid hardwood divide the country, and how it maps onto the constantly evolving **tariff/trade war**.

The vinyl heartland runs through the Midwest

Nationally, vinyl/LVT and engineered hardwood are nearly tied at roughly 40% each of plank flooring orders, but format preferences split sharply by region. Vinyl dominates the Great Lakes and Plains and thins toward the coasts.



MOST VINYL / LVT

North Dakota 66%

Nebraska 59%

Wisconsin 58%

Michigan 53%

Lowest: Rhode Island 32%, Maine 35%, the coasts.

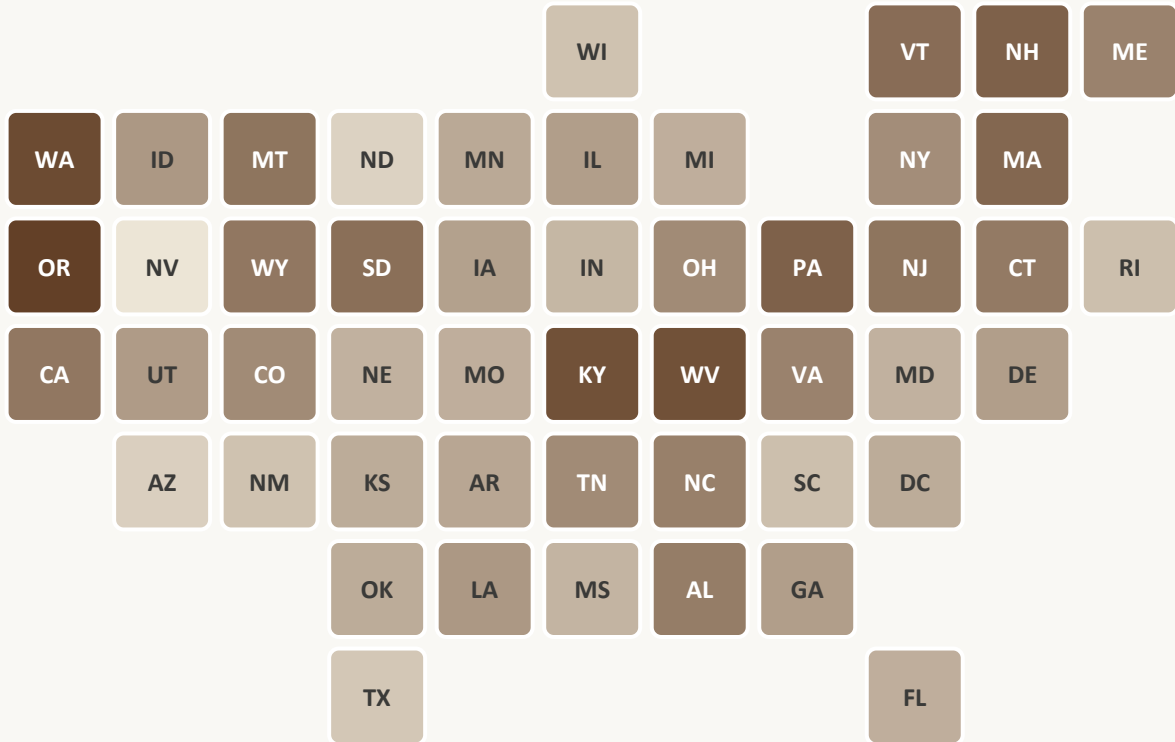
MORE A RENOVATION-DRIVEN CHOICE THAN NEW CONSTRUCTION

Building-permit data rules out rising new construction as the regional driver: the vinyl-heavy Midwest is more focused on renovating existing homes over building new ones.

more engineered wood  more vinyl / LVT

The hardwood belt is a trade-war map

Solid natural hardwood over-indexes in the Pacific Northwest, Appalachia, and Northern New England, and is thinnest in the fast-growth Sun Belt. These preferences align with America's hardwood country, which puts it at the center of the evolving tariff/trade war.



less solid hardwood  more solid hardwood

WHERE REAL SOLID WOOD CONCENTRATES

Oregon 9.7% **Washington 9.3%** **W. Virginia 9.1%**
Kentucky 9.1% **Pennsylvania 8.5%** **N.H. 8.5%**

Lowest: Nevada 3.7%, North Dakota 4.4%, the Sun Belt.

YOUR FLOOR IS AN IMPORT MAP

The belt that buys real wood is also a producer of it. Appalachia and the Northwest are U.S. hardwood country, hit by China's retaliatory tariffs and a 2025 log ban.

22% → 9% U.S. share of China's hardwood, 2024 to 2025 (USDA). The heartland's vinyl is mostly imported while the heritage belt's desire for wood is culturally engrained. Both are increasingly tariff exposed.

Late July 2026: the administration is rebuilding its tariff regime via Section 301 and 232 after the February Supreme Court ruling, with lumber now named a national-security item.