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Compete with
Mass Merchants
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and Design:
Fashion Forecast—
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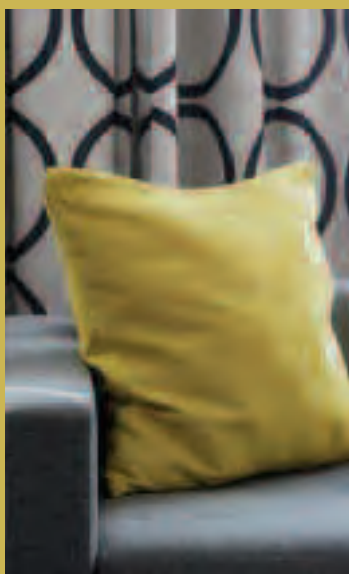
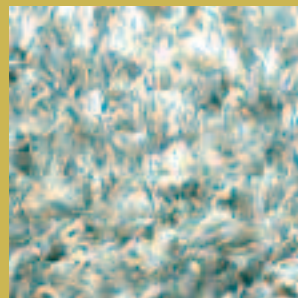
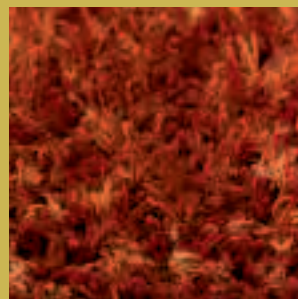
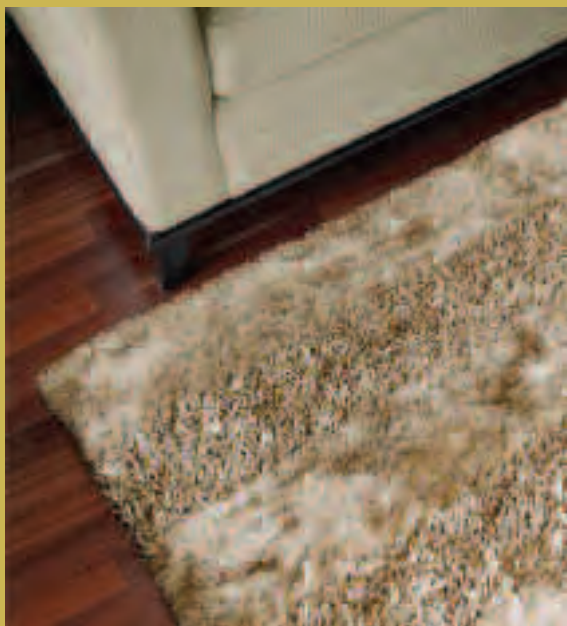
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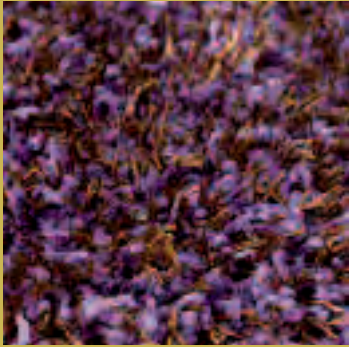
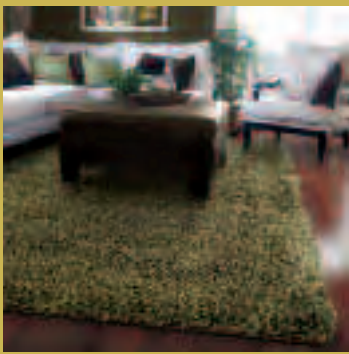




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- 8 OBSERVATIONS
CAN BRICK & MORTAR COMPETE
WITH MASS MERCHANTS/INTERNET? — BY LESLIE STROH - 40 PLUS
- 10 COLLECTIONS — ARTISTIC HOME, KARASTAN, FORT STREET STUDIO,
RIZZY HOME
- 12 COLLECTIONS — JAUNTY, KAS, KALEEN, V RUGS & HOME
- 14 COLLECTIONS — JAN KATH, LIORA MANNÉ, COURISTAN,
TUSCAN HILLS
- 17 and DESIGN: FASHION FORECAST — THE ELUSIVE COLOR TREND
— BY WESLEY MANCINI
- 19 DIRECTORY OF AREA RUG EXHIBITORS, HIGH POINT MARKET
APRIL 21 - 26, 2012
- 21 and DESIGN: SAVE THE PLANET
— BY SARAH STROH
- 25 10 POINTS ABOUT RUGS: 5 OF 10 -
MATERIAL CONTENT — BY DAVID LEW

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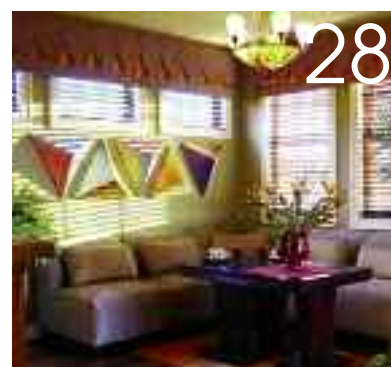
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by 19ft. 3in. Full images, reward details, etc.
online at www.rugnewsanddesign.com under
"Items Of Interest."



designers' notebook

- 26 JENNIFER M. GRIFFIN, ALLIED ASID
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- 28 MARY DIXON, ASID
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Observations

By Leslie Stroh, 40 plus

Can Brick and Mortar Compete with Mass Merchants and the Internet?

YES, BUT

We have talked to a number of people with strong views and vested interests on both sides of this question.

Basically, mass merchants sell 5x7 rugs for less than \$149/\$199 retail. They really don't sell much else, with some glaring exceptions like Costco pallet boxes.

Based on a conversation with Rugs USA and Rugs Direct, my take away is that the Internet/catalog sector sells 5x8's and 8x11's (8x10 to 9x12) with an average ticket of \$400. And from what I gather the basic price of a 9x12 is about \$1,000 or less.

So the operating environment is that these two categories have specific success stories: price, price and price, with a fashionable and transitory product in two sizes.

Internet/Mass merchants rely on traffic. Brick & Mortar have to rely on closing rates.

Can Brick and Mortar, without the traffic that both mass merchants and Internet sellers enjoy, compete on price in the sizes and qualities of the mass merchants in stores, or online?

NO, BUT

More and more companies are looking at ways to provide brick and mortar outlets with products at price points and margins such that these outlets can sell them

brick and mortar retailers to manage their inventory/business better, and create an Internet presence.

In the January and February issues of *Rug News and Design*, in the *and Design* section online at www.rugnewsanddesign.com, we wrote about trying to find rug stores in Charlottesville, Virginia. The big boxes were easy to find on the Internet, the others much less so. In the interview in the March issue, also available online, John Murse said that he even advertised in the yellow pages for the older customer who doesn't use the Internet.

David Khazai, principal, Innovations, RM PRO products, iRugz and eCatalog, is trying to put retailers online as an extension of their day-to-day business.

Kumquat, which added their Oriental Rug Retailer System in 1994, now called ORRS Gold, provides both SKU and single item inventory and sales management capability. Both companies offer sales analysis.

RM Pro provided me with an example of an actual rug store report, and it didn't take a MBA to see where the money was coming

continued on page 10

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Observations

continued from page 8

from. It reinforced our opinion that you can't run a rug store or store inventory without sales analysis. They also provided a report from an actual store labeled Projected Sales Increase Impact showing what the weekly, monthly and annual impact of an additional sale would have on overall sales of the store. (See *What's New/RM Pro* online.)

So what if the Brick and Mortar are on the Internet? Can they compete?

YES, BUT

Brick and Mortar can compete, particularly if they sell what the mass merchants and Internet companies do not.

The first way to compete is to rebrand the products at mass merchant and Internet price points by changing the name and the SKU so that consumers do not treat your store like a showroom and then buy the product elsewhere online.

In January the Pew Internet and American Life Project released a study done during the holiday season that did show that people used their cell phones to shop prices and to buy elsewhere. This is called "showrooming."

HOWEVER, in an interview with Koroush Yaraghi, founder of Rugs USA, one of the larger online retailers, he said that visitors to his site were less and less frequently searching sku numbers and brand names. They were looking at pictures of rugs. He has the data, not a survey.

We still think that as the price point gets above \$1,000 for a

continued on page 22

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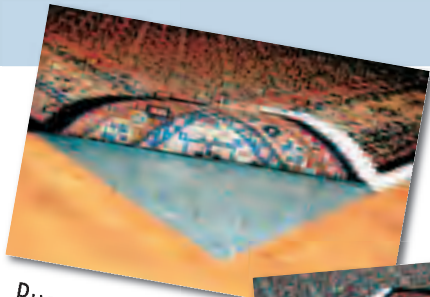
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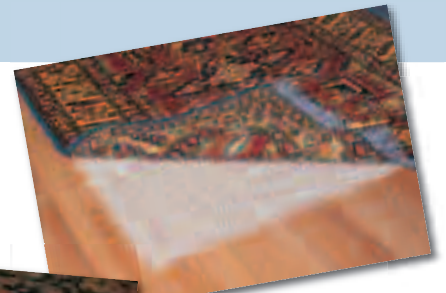
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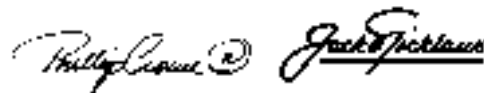


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Polypropylene Fiber Rises 24% Since January 1, 2012

RNAD Statistics April 2012

Polypropylene fiber rises 24% since January 1, 2012

Propylene feedstock rises 50% since January 1, 2012

Last year the story was the rapid rise in wool, and the impact on the hand tufted and hand knotted rug production. This year the story is a 24% increase in the price of polypropylene in the first quarter based on a 50% increase in polymer grade propylene. Interestingly, the price of Nylon 6 has been flat in the same quarter, although two suppliers are said to have initiated a less than 5% increase in price in February.

The big news in the consumer marketplace is that gasoline prices at the pump are up more than pe-

troleum prices by the barrel. For polypropylene it's a similar problem.

To get an answer we looked around for a publisher who followed these markets. ICIS Chemical Business is a publication of Reed Business Information, located in Houston. They follow the chemical and energy business pricing by talking to suppliers, buyers and traders. As we are new to this area, all errors and omissions are ours alone, they know the market, and we are new to market.

There are two types of polypropylene fibers: Bulk Continuous Fiber (BCF) and crimped, cut, spun (as is wool) and heat-set. Propylene is a gas and polypropylene is a thermoplastic, made by polymerization. "Thermoplastic" means that it melts

with heat. The rest of it you don't need to know. Remember BCF is a continuous filament, and heat set polypropylene is a spun fiber.

The question is: Why has the price of polypropylene gone up more than the cost of a barrel of oil? This is similar to the gasoline question.

continued on page 22



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andDesign: The Elusive Color Trend

By Wesley Mancini

Color is a moving target and to make it even more abstract "color is market specific". It is so market specific it has its own idiosyncratic trends from customer to customer, region to region, price point to price point, and category to category. For example, a high end West Coast furniture manufacturer may show hand-woven coarse textures with stylized transitional patterns in a rich neutralized palette while another high end furniture company from the South may have a more whimsical approach to both pattern and color using brighter, happier, more vibrant color combinations. An upper end Texan furniture company would show opulent textiles that verge on traditional motifs, heavy in chenille shown in lush leather friendly colors.

By "category to category" I mean a dining room chair, a reclining chair, an occasional chair, etc. would all have different colors and types of fabrics used from one to another and yet they are still "chairs".

While the international market is vast, color variations here range from electric modern (Italian) to faded historic (English) to nomadic and beyond.

The contrast between volume driven moderately priced companies verses the fashion forward upper end also runs the gamut. An upper end company will take risks and show unique color combinations to set themselves apart from their competition. The volume houses will stay true to colors that retail where price drives the sale. This store floor would tend to be a sea of neutrals.

In the decorative jobbing market, colors vary dramatically from jobber to jobber. Each jobber has their individual aesthetic, and therefore, their own unique color palette and design direction. Some jobbers are known as being old money "classic" while another

may be more affordable and transitionally focused. Interior designers know which jobbers they would gravitate to, based on their clientele's needs.

In retrospect, color nuances and trends start at the high end where the risks are taken. Whenever you read about trends one must assume that is the market they are talking about. If a color combination has a shelf life it may filter down to the moderately priced customers. If it is selling, then and only then would a commercial house use a neutralized version of the new palette but this would come several seasons after the color first hit the market place (sometimes years). Many colors never see the light of day at a moderate or commercial house.

Taking a cross section of the upper echelons in the textile world color trends for 2013 continue to support non-yellowed neutrals. Neutrals, while we know are the basis of the industry, have their fluctuations season to season. This trend highlights taupe, linens

continued on page 18



Wesley Mancini has been involved in domestic fabric design for the past 28 years with the Wesley Mancini by Home Fabrics line of upholstery. He also designs decorative trimmings and drapery hardware for Classical Elements. Recently, he and Due Process Trading Co. signed a long term arrangement to create an ongoing rug line carrying his name as well. He has earned: the HomeTex Award, The Grand Trillium Award, the DuPont Creative Leadership Award, as well, is the only National Endowment for the Arts grant recipient for fabric design. All fabrics copyright 2012 Wesley Mancini.

Wesley Mancini designs for the furniture industry and does not sell retail or to the trade. For more information about the fabrics shown contact: www.valdeseweavers.com.

and Design: The Elusive Color Trend

continued from page 17

and beiges with either pink or greenish casts. While the yellow cast has been eliminated from the overall color palette, it's made way for yellow to stand out on its own. Here we have clear vibrant yellows that vary from bright "daffodil" to toned down "ochre and butter".

Blues evolve into the turquoise realm towards greenish blue except for royal navy which has a red cast. Plums and violets continue to show true as being a fashion color. This family has life at the high end but

1. Lissini

2. Lissini, Generosa & Aurelia highlight a dominant turquoise color trend.

3. Amabrogio, an explosive contemporized floral, is shown combining turquoise with a yellow green.

4. Lakeland, shows a trend of coastal patterning while combining vibrant greens.

5. Balsamo and Regolo, ever present textures, (showing a grass cloth and menswear weave) in today's neutral palette.

rarely turns into sales on the retail floor. Greens vary from bold yellow greens and vibrant emerald to grayed and muddled. Mid-toned bluish pink and reds with a blue cast are being highlighted while oranges simmer down to being less vibrant and more neutralized then previously shown.

continued on page 20

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Casa Fiora 330 N Hamilton St S-201
Catnapper Furniture Plaza Suites 300
Chandra Rugs Showplace 1635
Classic Home IHFC D443
Company C IHFC D431
Creative Touch SMS 1-604
Dalyn IHFC D315
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Diane Paparo Studio SMS G-7018 SALON
Dreamweavers IHFC H407
Due Process Stable Trading Co MS 211, 216
Eliko Antique and Decorative Rugs

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eSaleRugs.com Showplace 1537
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Feizy Rugs MS 143, 145
Foreign Accents Contemporary Rugs IHFC H513
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Howard Miller Total Home IHFC C402
J & D Oriental Rugs/Rugs R Us SMS M-2035
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Jaunty Co IHFC D329
JLA Home IHFC G382
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Kaleen Rugs IHFC D343
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Linon 220 Elm 202, 216
Liora Manne IHFC G365, G367
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Marc Phillips Decorative Rugs SMS M-4027
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MAT / M.A. Trading 220 Elm 304
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Rugs America IHFC G373
Rugs R Us/J & D Oriental Rugs SMS M-2035
S & H Rugs SMS M-4039
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Safavieh MS 117, 120, 121
Shadow Mountain MS M90
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and Design: The Elusive Color Trend

continued from page 18

There are color combinations that evolve into the mainstream. Besides the ever present and ubiquitous neutrals, leather friendly

colors may alter but in a less dramatic way than other areas. Here, fabrics need to work with shades of leathers and suedes. Tapestries are a great way to accent leather furniture.

Illustrated here in pattern Cianna, a pattern with a coarse visual texture, is comprised of teal blues and rusts. In the past the teal would have been navy, while the "look" may be somewhat familiar, it is fresh to the category.

7. Fiamma, with its historic reference, is shown in a plum and violet color way.

6. Enzinio is a contemporized frame created in a taupe and linen neutral combination.

8. Basildon demonstrates the use of trending colors.

9. Cianna illustrates the teal blue combination with rusts, perfect for leather friendly settings.

10. Trayton, a modernized over scaled Greek key, shows the toned down look of "orange".

Make no mistake, I am not being a color snob here. Each market has its "learned aesthetic" and as a designer, a successful one must learn these separations and categories. The focus for any designer is "sales" and color is at the forefront of this goal, however elusive. ☼

andDesign: Save the Planet

By Sarah Stroh

"Save the Planet" is a slogan that has been around for a while. In many cases it is easier to say than to do. On a personal level, we each do our part. For me, that meant decorating my wedding with things I could use in my home: saris that hung on tent poles now hang from windows and the runner for the wedding is now my living room rug. How does our personal need to "Save the Planet" transfer into our business need to do the same? Why is it important?

Kelly O'Neal of Design Legacy really summed it up nicely when I asked him why it was important to use recycled materials in his business: "One would have to live under a rock these days to be unaware of our need to conserve natural resources. Many of my customers sell recycled or green products only so we of course want to be inventive enough in the realm to keep their interest as well as creative to a point of absolute ease of use or function." More and more consumers are becoming conscious of what they buy, where it comes from and where it will end up. Kelly made another good point about the generational dif-

ference. About how the generation of his grandparents and mine (80-100yrs old) used and reused everything and how just forty years or so later we became the most wasteful society on the planet. Kelly shared with me the fact that 31 million tons of plastic was consumed by us last year with only 8% of it being recycled.

Recycling, Going Green, upcycling... whatever term a company chooses to use, they are doing something to help change our wastefulness. As an individual it is easy to recycle, as a company making the choice to use recycled materials and recycle products is a process.

A Business started because of helping the planet

Custom Cordage, LLC came about after a lobster rope manufacturer in Maine realized that the three strand fishing rope would no longer be used under federal regulation because the northern right whale was becoming entangled in the floating line. To keep this rope out of landfill, Custom Cordage purchased about 450,000 pounds of rope. So far they have made over 30,000 pieces of Reclaimed Fishing Rope Doormats and have



Design Legacy by Kelly O'Neal Recycled Rug

used up approximately 220,000 pounds of rope. You can view a picture of this mat on www.walkingthemarket.com. It was beautiful. It was reclaimed. It has a great story to it.

Companies who use products to help save the planet

Journey Trading Co. has taken to using sustainable mango wood in many of its furniture pieces. They also have two interesting rugs, one that is made from recycled t-shirts and another that is made from recycled Indian Army tarp. **Dreamweavers'** entire rug lines are made from different up-

continued on page 23



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Polypropylene Fiber Rises 24% Since January 1, 2012

continued from page 16

George Martin of ICIS (George@icis.com) said that polypropylene is made from propylene. Propylene pricing is about 60% related to the price of crude. The other factors are seasonal maintenance of crackers (crackers make petroleum products) and the fact that propylene at this time is in short supply. He also pointed out that the mix of products coming out of the crackers this time of year favors gasoline in a seasonal build up of supplies for the summer driving season. The maintenance period should end in the second quarter so going into the fall there will be less gasoline demand and typically more propylene supply.

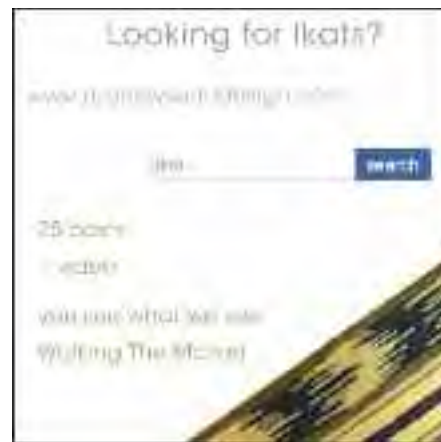
Daniel Lippe, president of Petral-Worldwide Inc., (danlippe@petral.com) an industry consultant in Houston, writing in the Oil and Gas Journal (vol 110 issue 3 March 5 2012), noted that the spot price of propylene is more volatile than the contract price. The article was a reasoned analysis of statistics from the US Energy Information Administration. In the introduction he pointed out that current trends in propylene prices are local/domestic rather than global, or in economic speak micro rather than macro.

In his forecast for 2012 on propylene (as goes propylene, so goes polypropylene which is made from polymer grade propylene) he said:

"Prices for refinery-grade propy-

lene were below 40¢/lb during the first week of January but surged to 64¢/lb during the last few days of the month. Prices surged even though inventory remained at unusually high levels and perhaps in response to anticipation of a significant decline in coproduct supply due to turnarounds during second-quarter 2012.

continued on page 24



Observations

continued from page 16

9x12, the retail environment changes.

Below \$1,000 retail 9x12 approximately, consumers are buying a pretty picture. **These are rugs that are bought.** And the mass merchants are mostly in the scatter/accent rug business.

Above \$1,000 retail 9x12 approximately, we think consumers want to feel the rug itself, and understand its features and benefits, one of which may simply be that the rug is bigger than 9x12. **These are rugs that**

are sold.

And above \$2,000/\$3,000 9x12 retail approximately, these are rugs that designers acquire for their customers, or help their customers select. **These are rugs that are placed.** The retailer or to-the-trade showroom didn't sell them, the designer placed the rug in the consumer's room.

HOW Does a retailer compete will appear in the May issue ☼



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Save the Planet

continued from page 21

cycled materials. **Zollanvari** has been using recycled silk to make beautiful one of a kind rugs. When speaking with Sanjay of **Zollanvari** about why they choose to use recycled materials he responded "Ethical: recycled yarn is eco friendlier than regular yarn. No need for dyeing. The washing doesn't need to strain natural resources as much. Aesthetic: it's recycled pre-dyed yarn, it lends itself very nicely to give us the natural striations/gradations in color." **Amer Rugs** has come out with a rug product that uses recycled wool from India. They use the excess wool which is left out in the process to create other hand-knotted and tufted products. The recycled wool is mixed with raw wool to increase the average fiber strength and avoid shedding. **Nalbandian** has taken vintage art deco rugs and turned them into new patchworked rugs. The rugs all held their original colors and as patchwork pieces have been

turned into modern works of art. **Creative Touch** has taken old rugs and turned them into beautiful overdyed/patchwork rugs.

Companies whose policy it is to be a part of the solution

Design Legacy by Kelly O'Neal has partnered with manufacturers both domestically and internationally to seek the best of the genre. Domestically, they are the exclusive representatives for Goods Made Good (a Goodwill Organization focused on rehabilitation of workers or providing jobs to those challenged by the average workplace) in the home industry. They have made some beautiful rugs and furniture out of the GMG program, which are also completely American designed and manufactured.

Shaw Living How to sum up briefly the green initiative they have enacted to be a part of the solution... They are focused on a closed looped cycle in all their products. This means from how it was created to where it ends up.



Shaw Living's Evergreen Facility. Where rugs get recycled back into rugs.

They want to be involved every step of the way. For over five years, they have focused on minimizing the impact on landfill with Cradle-to-Cradle® certification. The Shaw Nylon 6 Rug can be completely recycled into new carpet and area rugs again and again, never needing to hit the landfill. It is both recyclable and made in the USA.

Due to space limitations of this article, I could only touch upon a few of the companies out there that use recycled materials and/or make it their companies' policy to help save the planet. To find more rug companies and to view pictures of recycled-upcycled-reused rugs, please visit us at www.rugnewsanddesign.com and enter the search term "recycled" to see more than 30 postings in this category. 🌱



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10 Points About Rugs: 5 of 10

By David Lew

POINT 5: MATERIAL CONTENT

A carpet is made of three parts, the warp, the weft, and the pile, unless it is a flat woven rug.

"Warp" refers to the series of heavy threads running the length of the rug. In a hand knotted carpet, the warp, which is the main structure of the rug, is usually made of cotton, silk, wool, or a combination of these. The first two are preferred, since they do not expand or contract due to environmental influences such as temperature and humidity.

The pile of a hand knotted carpet would be made of wool, silk or a mixture of the two. You will also find rugs with a pile made of art silk, which can be mercerized cotton, rayon or viscose.

Then there is the weft line, which goes across the width of the rug in an over and under pattern. After every row of knots is woven (attached to the warps), a weft line, or sometime a double weft line, is drawn in between the warp threads, so that each row of knots is uniform and secure. The weavers beat this weft into place with a comb by hand, with such remarkable accuracy that every row fits as tightly

against the preceding row as the previous rows did.

Flat weaves, (also known as weft faced rugs), Aubusson weaves, and Soumac weaves would only have the warp and the weft lines. Soumac weaves have an added dimension, when another layer of design is added after the main woven rug's is completed.

The quality of the rug's wool must be thoroughly examined in order to determine the quality of a rug. Long fibers are better than short fibers. Wool varies greatly from different parts of the world. Is the wool from sheep living in a high mountainous region, or from a low lying land that has rich vegetation and a moderate climate? One must also determine if the wool is dead wool (from deceased sheep) or live wool, which would affect the amount of natural oils in the wool. The quality of the wool affects how well the carpet wears. If the material used in a carpet is inferior, the carpet's life expectancy is not too long, even with a fine foundation. One can easily feel the pile of the wool and make an assessment.

David Lew started in the rug business with ABC Oriental Carpets in 1982, worked for a series of well known and well respected retailers and wholesalers, and since 2000 has worked for the Bokara Rug Co. To be continued.

Polypropylene Fiber Rises 24% Since January 1, 2012

continued from page 22

"Spot prices for refinery-grade propylene, however, rarely remain discounted vs. Gulf Coast gasoline prices; so the price rally in January occurred only a month or two sooner than expected. Petral forecasts spot prices for refinery-grade propylene will average 56-60¢/lb for first-quarter 2012 and 60-65¢/lb for second quarter. Premiums vs. Gulf Coast unleaded regular gasoline will average 10-12¢/lb for first-quarter 2012 and 18-22¢/lb for second quarter.

"Petral forecasts polymer-grade propylene will average 62-65¢/lb during first-quarter 2012 and 68-72¢/lb during second quarter 2012. Forecasts for polymer-grade propylene are based on premiums of 7-95¢/lb vs. refinery-grade propylene."

We read his forecast as saying prices went up about 50% at the end of January and are likely to stay there for the first half. ☼

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WHAT MARKETS DO YOU USUALLY ATTEND?

Every couple of years I go to the High Point Market and visit the Boston Design Center more often. I do like to go to some New York shows and the Design Centers there. I take my clients to showrooms, so they can see and help with decisions.

DO YOU HAVE A FAVORITE SOURCE?

I particularly like Landry and Arcari in Boston and Salem, as well as Stark Carpet. Both have excellent quality, good service, good prices and good turn around time. I often turn to them for custom rugs, but as the economy has slowed, I only order a custom rug every couple of years.

DO YOU HAVE A FAVORITE FIBER OR STYLE OF RUG?

I prefer to use natural fibers, such as wool, silk, and mohair, because of their cleanability. Of course it depends on the location and placement of the client's carpet in their home. Sisal is not practical, as it is not particularly cleanable, so I don't use it very much.

DO YOU SHOP ONLINE?

No, it is important for my client to see the quality of the rug and to touch and feel it.

HOW IMPORTANT IS "GREEN" TO YOU?

Green is very important to me and always has been. Price, of course, is a major consideration, and it doesn't fit every budget. The final decision usually rests with the client and their preferences.

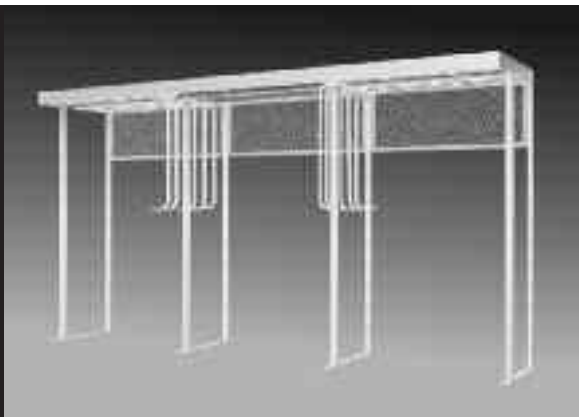
DO YOU HAVE A DESIGN RULE THAT YOU LIKE TO FOLLOW?

I have been in design for a number of years. I think it is very important to follow the client's needs, desires, and wants. Every project changes with every customer. I definitely don't have a "cookie cutter" design program to fit everyone. It is very individualized and must pass the test of time.

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“*‘Green’ is very important to me and always has been.*”



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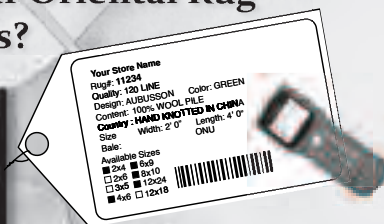
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WHAT MARKETS DO YOU ATTEND?

I go to High Point, as well as NeoCon in Chicago. I used to live in Houston where there are fabulous showrooms. Here in Cleveland the Ohio Design Center is the closest design center, but I only go there occasionally.

WHEN DO YOU CHOOSE YOUR FLOOR COVERING?

Early on I choose the floor covering, as I consider it a key element in a project. Typically I either choose a key fabric and then the rug, or possibly vice versa. Wool is my absolute favorite fiber, but I do like anything textural. By that I mean a rug with loops or pebbles, something tactile.

WHERE DO YOU SOURCE YOUR RUGS?

There are a couple of great showrooms near Columbus that I like to go to: K.A. Menendian Rug Gallery and Azia Oriental Rugs. Fine Oriental Rugs only works with the trade, but they have wonderful price points. Two other places I like to go for all kinds of rugs are ProSource and America's Floor Source. My style is more contemporary, so I don't use a lot of antique rugs—although sometimes antiques look great with contemporary.

DO YOU ORDER MANY CUSTOM RUGS?

I do a lot of custom rugs out of broadloom. This is a quick and easy way to fit a budget and have a lovely carpet. I particularly like to do this with shag or friezé; Masland has some lovely choices with great borders. They are speedy too.

Typically I order samples to show the client from online sites. Surya is really good about this and one of my key lines. They have a wide range of choices and good customer support.

ANY DESIGN RULES YOU LIKE TO FOLLOW OR LIKE TO BREAK?

A rule I like to follow is to incorporate a certain rhythm and repetition of elements in my design project. For instance, it may be circles. If there are circles in the rug, there may be circles in the fabric, in a lamp or elsewhere in accessories. Otherwise I like to break out of the mold and use materials in an unusual way. Perhaps put a jute rug on a wall, or use a rug for a tablecloth or on the upholstery. Sometimes I think it interesting to take a giant antique rug and make it wall to wall.

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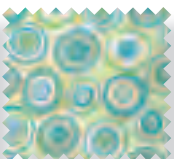
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The background of the advertisement is a collage of various ikat textile patterns. In the top right, there's a pattern with horizontal stripes and stylized figures. Below it, a pattern with large, repeating circular motifs in teal and brown. At the bottom left, a pattern with dark, jagged, mountain-like shapes on a light background. At the bottom right, a pattern with horizontal stripes and small, repeating motifs. The text is overlaid on a white circular shape in the center-left.

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