



Freedonia Focus Reports
Global Collection

Countertops: Canada

May 2020



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Near-Term Impact of COVID-19	7
Area of Installation	8
Environmental & Regulatory Factors	10
North America Regional Outlook	12
3. Segmentation & Forecasts	14
Materials	14
Laminate	15
Engineered Stone	15
Solid Surface	16
Granite	17
Marble & Other Natural Stone	17
Porcelain Slab & Sintered Stone	18
Other Materials	19
Markets	21
Residential	22
Nonresidential	22
4. Industry Structure	24
Industry Characteristics	24
Market Leaders	25
DuPont	26
Formica	26
Panolam Industries	26
5. About This Report	28
Scope	28
Sources	29
Industry Codes	29
Freedonia Methodology	30
Resources	31

List of Tables & Figures

Figure 1 Canada: Key Trends in the Countertop Market, 2019 – 2024	3
Figure 2 Canada: Countertop Demand Trends, 2009 – 2019	5
Table 1 Canada: Key Indicators for Countertop Demand, 2009 – 2024 (2018US\$ bil)	6
Figure 3 Canada: Countertop Demand by Area of Installation, 2019 (%)	8
Figure 4 North America: Countertop Demand by Country, 2019 (%)	12
Figure 5 Canada: Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	14
Table 2 Canada: Countertop Demand by Material, 2009 – 2024 (000 sq mtr)	14
Figure 6 Canada: Countertop Demand by Material, 2009 – 2024 (%)	19
Figure 7 Canada: Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	21
Table 3 Canada: Countertop Demand by Market, 2009 – 2024 (000 sq mtr)	21
Figure 8 Canada: Countertop Demand by Market, 2009 – 2024 (%)	23
Table 4 Canada: Selected Suppliers to the Countertop Market	25
Table 5 NAICS & SIC Codes Related to Countertops	29

About This Report

Scope

This report forecasts to 2024 countertop demand in square meters in Canada. Total demand is segmented by material in terms of:

- laminate
- engineered stone
- solid surface
- granite
- marble and other natural stone such as limestone, slate, and soapstone
- porcelain slab and sintered stone
- other materials such as glass, stainless steel, and wood

Total demand is also segmented by market as follows:

- residential
- nonresidential

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

This report analyzes the market for residential and nonresidential countertops, including kitchen, bathroom, and other (e.g., laundry and bar) countertops for the new construction and remodeling markets. In this report, countertops are defined as countertop surfaces, as well as edging and backsplash, but not countertop materials used as wall coverings.

Countertops used in applications other than residential and nonresidential buildings – such as in recreational vehicles, ships, and boats – are excluded. Surfaces installed on tables, rolling utility carts, and other furniture are also excluded from this report.

Integrated sinks were included in demand if they featured functional counter space on either side of the sink (only the counter space itself was included in the countertop estimate – the sink itself was excluded). If the integrated sink only featured a small edge or lip, the entire integrated sink was excluded.

Tile made from granite, marble, or other natural stones are included in the other materials category.

For purposes of this report, all engineered stone data is at the slab manufacturer's level.

Demand for countertops is measured at the installation level.

About This Report

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Countertops: Canada (FA60020) is based on *Global Countertops*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Countertops

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
238340	Tile & terrazzo contractors	1743	Terrazzo, tile, marble, mosaic work
238390	Other building finishing contractors	1799	Special trade contractors, nec
326199	All other plastics product mfg	2511	Wood household furniture, except upholstered
327110	Pottery, ceramics, & plumbing fixtures mfg	2514	Metal household furniture
327991	Cut stone & stone product mfg	2541	Wood office & store fixtures, partitions, shelving & lockers
337110	Wood kitchen cabinet & countertop mfg	2542	Office & store fixtures, partitions, shelving, & lockers, except wood
337215	Showcase, partition, shelving, & locker mfg	3089	Plastic products, nec
		3281	Cut stone & stone products
		5712	Furniture stores
		5719	Miscellaneous home furnishings

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Countertops

Freedonia Industry Studies

Behind the Wall Plumbing

Cabinets

Countertops

Decorative Laminates

Decorative Tile

Global Adhesives & Sealants

Global Construction Chemicals

Global Drywall & Building Plaster

Global Engineered Stone Countertops

Global Housing

Global Major Household Appliances

Home Kitchen & Bathroom Remodeling

Outdoor Kitchens

Plumbing Fixtures & Fittings

Freedonia Focus Reports

Adhesives & Sealants: Canada

Architectural Services: United States

Cabinets: United States

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Decorative Laminates: United States

Housing: Canada

Major Household Appliances: Canada

Plumbing Fixtures & Fittings: Canada

Stone Tile: United States

Windows & Doors: Canada

Wood Millwork: United States

Freedonia Custom Research

Trade Publications

Canadian Woodworking & Home Improvement

Discovering Stone

Houzz

About This Report

Kitchen & Bath Business

Kitchen & Bath Design News

Stone Specialist

Stone World

Agencies & Associations

Agglomerated Stone Worldwide Association

Canada Green Building Council

Canadian Construction Association

Canadian Home Builders' Association

International Cast Polymer Association

International Surface Fabricators Association

National Association of the Remodeling Industry

National Kitchen & Bath Association

Natural Stone Institute

Statistics Canada

United Nations Comtrade

World Bank