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Global Collection



Global

Countertops

May 2020



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Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
Near-Term Impact of COVID-19	5
Demand by Material	7
Solid Surface	8
Laminate	9
Granite	9
Marble & Other Natural Stone	10
Engineered Stone	11
Porcelain Slab & Sintered Stone	11
Other Materials	12
Demand by Market	14
Residential	15
Nonresidential	15
3. Regional Segmentation & Forecasts	17
Regional Demand Overview	17
North America	19
Western Europe	21
Asia/Pacific	23
Other Regions	25
Central & South America	26
Eastern Europe	26
Africa/Mideast	27
4. Industry Structure	28
Industry Characteristics	28
Market Share	29
Wilsonart International	30
Formica	31
DuPont	31
5. About This Report	33
Scope	33
Sources	34
Industry Codes	34
Freedonia Methodology	35
Resources	37

List of Tables & Figures

Figure 1 Global Countertop Market Outlook, 2019 – 2024	4
Figure 2 Global Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	7
Table 1 Global Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	7
Figure 3 Global Countertop Demand by Material, 2009 – 2024 (%)	13
Figure 4 Global Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	14
Table 2 Global Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	14
Figure 5 Global Countertop Demand by Market, 2009 – 2024 (%)	16
Figure 6 Global Countertop Demand by Region, 2009 – 2024 (mil sq mtr)	17
Table 3 Global Countertop Demand by Region, 2009 – 2024 (mil sq mtr)	17
Figure 7 Global Countertop Demand by Region, 2009 – 2024 (%)	18
Figure 8 North America: Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	19
Figure 9 North America: Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	19
Table 4 North America: Countertop Demand by Material & Market, 2009 – 2024 (mil sq mtr)	20
Figure 10 Western Europe: Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	21
Figure 11 Western Europe: Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	21
Table 5 Western Europe: Countertop Demand by Material & Market, 2009 – 2024 (mil sq mtr)	22
Figure 12 Asia/Pacific: Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	23
Figure 13 Asia/Pacific: Countertop Demand by Market, 2009 – 2024 (mil sq mtr)	23
Table 6 Asia/Pacific: Countertop Demand by Material & Market, 2009 – 2024 (mil sq mtr)	24
Figure 14 Other Regions: Countertop Demand by Region, 2009 – 2024 (mil sq mtr)	25
Figure 15 Other Regions: Countertop Demand by Material, 2009 – 2024 (mil sq mtr)	25
Table 7 Other Regions: Countertop Demand by Region & Material, 2009 – 2024 (mil sq mtr)	27
Figure 16 Global Countertop Market Share by Company, 2019 (%)	29
Table 8 Selected Suppliers to the Global Countertop Market	30
Table 9 NAICS & SIC Codes Related to Countertops	34
Table 10 HS Codes Related to Countertops	35
Table 11 NACE Codes Related to Countertops	35

About This Report

Scope

This report forecasts to 2024 global demand for countertops by material, market, and major world region in square meters. Material segments include:

- solid surface
- laminate
- granite
- marble and other natural stone
- engineered stone
- porcelain slab and sintered stone
- other materials such as bamboo, concrete, and stainless steel

Reported markets encompass:

- residential
- nonresidential

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, material, market, and regional demand (including material and market segments) are provided for 2009, 2014, and 2019.

This report analyzes the global market for residential and nonresidential countertops (also called benchtops or worktops in some parts of the world), 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.

About This Report

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.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Countertops (FW60020) is based on 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 9 | 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

About This Report

Table 10 | HS Codes Related to Countertops

HS Code	Definition
6802.23	Monumental of building stones & articles, thereof NESOI, simply cut or sawn with a flat or even surface of granite
6802.91	Worked monumental or building stone NESOI, of marble, travertine & alabaster
6810.99.00.10	Agglomerated quartz slabs for countertops

Source: United Nations Statistics Division

Table 11 | NACE Codes Related to Countertops

NACE Code	Definition
16.29	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting
22.29	Manufacture of other plastic products
22.31	Manufacture of ceramic tiles and flags
23.69	Manufacture of other articles of concrete, plaster and cement
23.70	Cutting, shaping and finishing of stone
31.09	Manufacture of other furniture

Source: European Commission

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

About This Report

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.

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Resources

The Freedonia Group

Global Countertops

Freedonia Industry Studies

Adhesives & Sealants in the US

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

Cabinets: United States

Commercial Building Construction: United States

Construction: United States

Countertops: United States

COVID-19 Market Impact Analysis

Decorative Laminates: United States

Global Plumbing Fixtures & Fittings

Housing: United States

Major Household Appliances: United States

Prefabricated Housing: United States

Stone Tile: United States

Wood Millwork: United States

Freedonia Custom Research

Trade Publications

Discovering Stone

Houzz

Kitchen & Bath Business

About This Report

Kitchen & Bath Design News

Stone Specialist

Stone World

Agencies & Associations

Agglomerated Stone Worldwide Association

Australian Stone Advisory Association

The Brazilian Institute of Geography and Statistics

Eurostat

International Cast Polymer Alliance

International Monetary Fund

International Surface Fabricators Association

National Association of the Remodeling Industry

National Kitchen & Bath Association

Natural Stone Institute

Organisation for Economic Co-operation and Development

Statistics Canada

United Nations Comtrade

United States Census Bureau

United States International Trade Commission

World Bank