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# Global Engineered Stone Countertops

May 2020



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# About This Report

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## Scope

This report forecasts to 2024 global demand for engineered stone countertops by area of installation, market, and major world region in square meters. Area of installation segments include:

- kitchens
- bathrooms
- other areas such as residential finished basements and dining rooms, hotel lobbies, and retail customer service areas

Reported markets encompass:

- residential
- nonresidential

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

To illustrate historical trends, world, area of installation, market, and regional demand (including area of installation and market segments) are provided for 2009, 2014, and 2019. Finally, global production is segmented by major world region and provided for 2009, 2014, 2019, and 2024.

This report analyzes the global market for engineered stone countertops (also called benchtops or worktops in some parts of the world), which includes engineered quartz, engineered marble, and polymer concrete.

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 included as part of the nonresidential market. This includes countertops used in applications such as recreational vehicles and boats, aircraft, cruise ships, and rail equipment.

Surfaces installed on tables, rolling utility carts, and other furniture are excluded from this report. Demand is measured at the slab manufacturer 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 Engineered Stone Countertops* (FW60122) 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 10 | NAICS & SIC Codes Related to Engineered Stone Countertops**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
327991	Cut stone & stone product manufacturing	3281	Cut stone & stone products

Source: US Census Bureau

**Table 11 | HS Codes Related to Engineered Stone Countertops**

HS Code	Definition
6810.99	Articles Of Cement, Concrete Or Artificial Stone, Whether Or Not Reinforced
6810.99.00.10	Agglomerated quartz slabs for countertops

Source: United Nations Statistics Division

**Table 12 | NACE Codes Related to Engineered Stone Countertops**

NACE Code	Definition
23.69	Manufacture of other articles of concrete, plaster and cement
23.70	Cutting, shaping and finishing of stone

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 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 Engineered Stone Countertops*

### Freedonia Industry Studies

*Adhesives & Sealants in the US*

*Cabinets*

*Countertops*

*Decorative Laminates*

*Decorative Tile*

*Global Adhesives & Sealants*

*Global Construction Chemicals*

*Global 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

*Houzz*

*Kitchen & Bath Business*

*Kitchen & Bath Design News*

*Stone Specialist*

*Stone World*

### **Agencies & Associations**

Agglomerated Stone Worldwide Association

Eurostat

International Monetary Fund

International Surface Fabricators Association

National Association of the Remodeling Industry

National Kitchen & Bath Association

Organisation for Economic Co-operation and Development

Statistics Canada

United Nations Comtrade

United States Census Bureau

United States Department of Commerce

United States International Trade Commission

World Bank