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# Decorative Laminates

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US Industry Study with Forecasts for **2011 & 2016**

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Study #2203 | June 2007 | \$4400 | 281 pages

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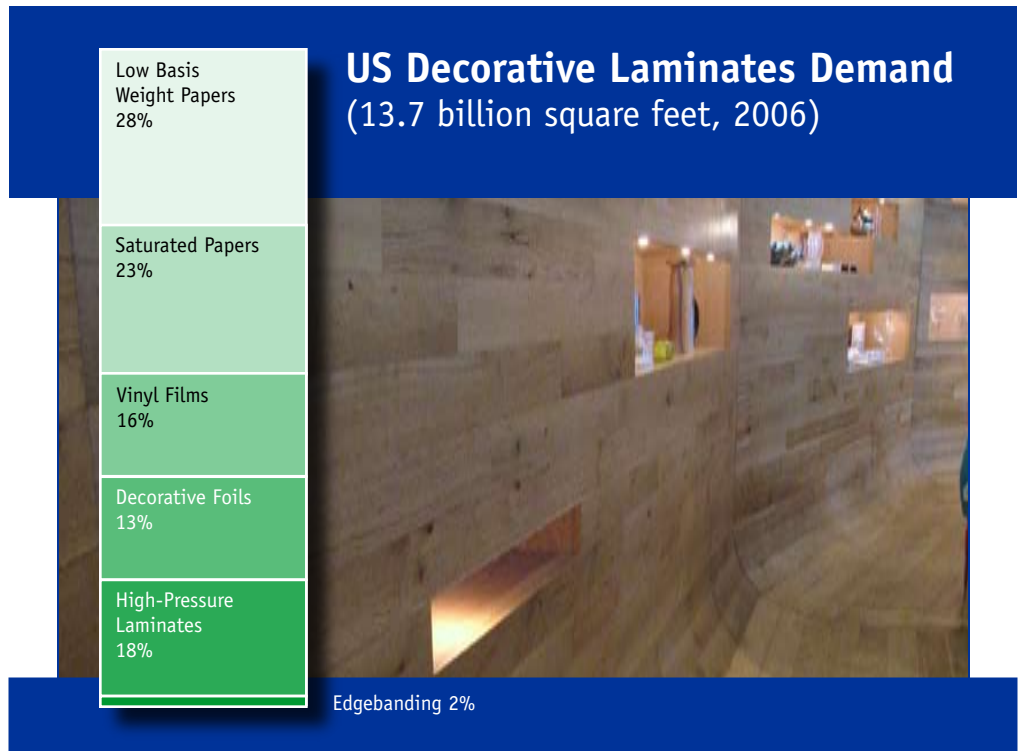
*Gains in US demand will be sparked by increased demand for laminate flooring, which is projected to advance 9.6 percent per annum, and for laminate store fixtures and wall panels.*

## US demand to rise 3.8% annually through 2011

Sales of decorative laminates in the US are forecast to increase 3.8 percent per year to 16.6 billion square feet in 2011, valued at \$8.2 billion. Gains will be sparked by increased demand from the flooring industry, where the market for laminate flooring is projected to advance 9.6 percent per annum to 1.5 billion square feet in 2011. Increases in demand will continue to be supported by laminate flooring's low cost, ease of installation and low maintenance requirements. Other gains for decorative laminates will be driven by strong activity in nonresidential construction, which will benefit demand for laminate store fixtures and wall panels. For store fixtures, advances will stem from the price, performance and style advantages of laminate materials, as well as ongoing strength in retail sales activity.

## Laminate cabinets to supplant other materials

Cabinets will use 4.4 billion square feet of decorative laminates in 2011, despite below-average growth. Homeowners' desires to renovate their kitchens and bathrooms will remain the primary driver for the market, as consumers will continue to use laminates due to their ease of maintenance and low cost. Demand for laminate cabinets will occur at the expense of other materials, such as softwood plywood. Further advances



will be restrained as new residential construction slows, limiting the installation of cabinets in new housing.

## Low-pressure laminates to remain dominant

Laminates made from low-pressure overlays, including low-basis weight papers, saturated papers, decorative foils and vinyl films, are forecast to comprise 81 percent of decorative laminate sales volume in 2011. Demand will be driven by increased use of saturated papers in the high-growth flooring market and improving printing technologies that create laminates with more realistic woodgrain and other patterns.

## High-pressure laminates to be among fastest growing types

High-pressure laminates are expected to post above-average growth through 2011. These laminates will continue to be desired because of their durability and resistance to impacts and marring. High-pressure laminates will be used in the production of flooring, countertops, fixtures and other items with horizontal surfaces. However, some low-pressure laminates, such as decorative foils and saturated papers, will be increasingly competitive with high-pressure laminates in a growing number of applications.

## Sample Text, Table & Chart

### PRODUCTS

#### Low-Pressure Laminates

Demand for laminates made from low-pressure overlays to advance... billion square feet in... valued at \$... papers and decorative... expected to... gains over the forec... while dema... and vinyl films w... below-aver...

**SAMPLE TEXT**

Gains in... demand will be driven by several factors. One important factor is the rising trend of using low-pressure laminates in conjunction with high-pressure laminates within the same product. Although low-pressure laminates are generally less durable than their high-pressure counterparts, low-pressure laminates are also less expensive. Therefore, lower material costs can result from applying low-pressure laminates to vertical surfaces of cabinets and furniture, and other applications with low durability requirements, as well as low- to moderate-traffic horizontal surfaces that require minimal material durability. Low-pressure laminates are also eroding the traditional market dominance of high-pressure laminates in high-end markets requiring a high degree of aesthetic qualities. Increasing numbers of laminate suppliers offer low- and high- pressure laminates in matching or coordinating colors and patterns.

At the same time, demand for low-pressure laminates will be impaired by several factors. Most low-pressure laminates are not durable enough to be used on high-traffic horizontal surfaces requiring enhanced degree of wear resistance. Additionally, like most laminates, many low-pressure laminates face competition from other surfacing materials, including vinyl, stone, cast poly wood, engineered wood and veneers.

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TABLE III-2

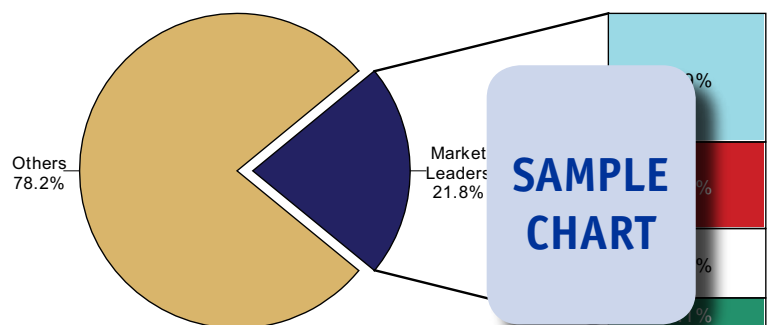
### PLASTICS DEMAND IN DECORATIVE LAMINATES (million pounds)

Item	1996	2001	2006	2011	2016
Decorative Laminates (mil sq ft)					0
lbs plastic/000 sq ft laminate					4
Plastics Demand in Laminates					5
Phenolic					0
PVC					0
Melamine					0
Other Plastics					5

**SAMPLE TABLE**

CHART VI-1

### DECORATIVE LAMINATES MARKET SHARE, 2006 (\$6.7 billion)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE V-1**  
**DECORATIVE LAMINATES DEMAND BY MARKET**  
 (million square feet)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil 2000\$)	8329	9891	11400	13150	15150
sq ft/000\$ GDP					
Decorative Laminates Demand					
Cabinets					
Furniture					
Store Fixtures					
Flooring					
Wall Panels					
Countertops					
Other					
\$/sq ft					
Decorative Laminates Demand (mil \$)	300	300	300	300	300

**SAMPLE  
TABLE**

### COMPANY PROFILES

#### Timber Products Company

305 South Fourth Street  
 Springfield, OR 97477  
 541-747-4577  
<http://www.timberproducts.com>

Annual Sales: (3/07)  
 Employment:

Key Products: plywood, hardwood veneer

**SAMPLE  
PROFILE**

Timber Products makes softwood and hardwood veneer and plywood, particleboard and decorative laminate panels. In addition to serving US markets, the privately held company imports and exports lumber products through its International division. Timber Products maintains 120,000 acres of softwood timberlands in northern California.

The Company primarily participates in the US decorative laminates industry through the Spectrum division, which makes and markets decorative laminate panels. These panels are sold under the COLORLAM, SPECTRABOARD, DECRABOARD, POLYBOARD and CUSTOM CUTS brand names. The Spectrum division maintains a production center in White City, Oregon.

COLORLAM thermally fused melamine (TFM) panels serve as economical yet durable alternatives to high-pressure laminates. These panels are used in vertical and light-duty horizontal applications to make kitchen cabinets, shelving, home and office furniture, closet organization systems, store displays and work stations. COLORLAM TFM

“In the nonresidential market, laminates are widely used because this market is generally more cost-conscious and less interested in aesthetics and style trends than the residential market. Demand in the nonresidential market is expected to increase 2.2 percent annually through 2011. Growth in this market will be due to increased construction expenditures, including the ...”

--Section V, pg. 121



**OTHER STUDIES**

**Residential Kitchen & Bath Countertops**

US countertop demand will reach 540 million square feet in 2011, driven by the remodeling segment. Engineered stone and natural stone countertops will grow the fastest while laminate countertops will remain the market leader. Kitchen countertops will continue to outpace bathroom types. This study analyzes the \$12.7 billion US residential kitchen and bath countertop industry, with forecasts for 2011 and 2016 by material, product, market and region. It also evaluates market share and profiles major players.

#2237 ..... 10/2007..... \$4500

**Home Organization Products**

US sales of home organization products will grow 4.5% annually through 2011, driven by demographic trends favoring more organized storage needs. Metal and wire products will remain the largest type and grow the fastest, especially modular units. Products used in garages and closets will lead gains by room. This study analyzes the \$6.9 billion US home organization product industry, with forecasts for 2011 and 2016 by material, product, room and market. It also evaluates market share and profiles major producers.

#2224 ..... 09/2007..... \$4400

**Hard Surface Flooring**

US demand for hard surface flooring will grow 3.9% annually through 2011. Gains will be driven by growing consumer preference for high-end flooring like wood, laminates and ceramic tile, as well as growing interest in natural products such as natural stone, engineered wood, linoleum, cork and bamboo. This study analyzes the 9.9 billion square foot US hard surface flooring market, with forecasts for 2011 and 2016 presented by product and market. The study also details market share and profiles major firms.

#2209 ..... 06/2007..... \$4400

**Wood Panels**

US demand for wood panels will decline 1.1% annually through 2010, restrained by a weak single family housing market. Best prospects will occur in smaller segments such as new nonresidential building and construction improvements and repairs. Nonstructural panels will see marginal increases based on a brighter outlook for manufacturing. This study analyzes the \$18.2 billion US wood panel industry to 2010 and 2015 by product, market and region. It also evaluates company market share and profiles major players.

#2124 ..... 01/2007..... \$4400

**World Flooring & Carpets**

World floor covering demand will rise 4.1% yearly through 2010. China will surpass the US to become the top market, and sales will also be strong in India, Indonesia, Turkey, Iran, the Ukraine and Saudi Arabia. Developed areas will grow slower. Nonresilient flooring will outpace resilient flooring and carpets and rugs. This study analyzes the \$126 billion world flooring and carpet industry to 2010 and 2015 by product, market, world region and for 31 countries. It also evaluates market share and profiles major firms.

#2139 ..... 12/2006..... \$5500

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