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Study #2364 | June 2008 | $4700 | 338 pages

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767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

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A rebound in new housing construction from a low base in 2002, as well as building design trends toward greater cabinet use per residence will support new residential cabinet demand.

US demand to rise 3.9% annually through 2012

US demand for cabinets is forecast to expand 3.9 percent per year through 2012 to $18.5 billion. A rebound in new housing construction from a low base, as well as building design trends that lead to greater cabinet use per residence, will support new residential cabinet demand. In improvement and repair applications, which are the largest end use for cabinets, demand will be aided by ongoing growth in spending through 2012. Changing consumer preferences in cabinet design and various demographic factors -- such as an older, wealthier US population -- will also support demand.

Kitchen, bathroom cabinets to benefit from user trends

Cabinet shipments in the US will grow 3.7% annually through 2012. Kitchen cabinets, which represented about 85 percent of cabinet shipments in 2007, will benefit from a continuing trend toward using more cabinets to provide increased utility, as well as from an expanding range of kitchen cabinet styles and options. In addition, the rising use of kitchen-type cabinets in other rooms of the home (e.g., laundry rooms and media rooms) will also aid increases. Shipments of bathroom cabinets will offer slightly stronger growth prospects through 2012, supported by design trends such as larger bathrooms and a greater number of bathrooms per house, as well as by a recovery in new housing construction and ongoing gains in improvement and repair expenditures. Demand for other types of cabinets will be led by the strong performance of garage and nonoffice (e.g., laundry, hobby and mudroom) cabinets, which will benefit from the ongoing popularity of built-in cabinetry where it has not been traditionally used. In addition, store display fixtures and other cabinets will see growth, bolstered by a healthy nonresidential construction environment.

Residential market to outpace nonresidential

Residential buildings accounted for the largest share of cabinet demand in 2007, with 81 percent. The residential market will continue to hold this leading position through 2012, given its greater intensity of cabinet use compared to nonresidential and nonconstruction markets. In addition, improvement and repair activity is often aided by consumers' changing aesthetics. Through 2012, the nonresidential market is anticipated to see solid gains, supported by growth in both new construction and improvement and repair spending. The role played by aesthetics in cabinet demand varies among the different nonresidential applications, with decorative concerns mainly affecting decisions in retail and other consumer-oriented settings such as spas and lodging establishments, and price and performance playing a larger role in lower visibility applications such as office kitchens and industrial facilities.

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Sample Text, Table & Chart

TABLE III-4

ENGINEERED WOOD USE IN CABINET PRODUCTION
(million square feet -- 3/8 inch basis)

Item	1997	2002	2007	2012	2017
Wood-Based Cabinet Materials (mil $)					0
% engineered wood					4
Engineered Wood Materials (mil $)					5
$/sq ft					5
Engineered Wood					0
Particleboard					5
Plywood					0
MDF					0
Other					5
sq ft eng wood/000$ cabinets					2
Cabinet Shipments (mil 2000$)	9				50

SAMPLE TABLE

MARKETS

Residential

Cabinets are installed as part of both new construction a
ment and repair projects in single-family homes, multifamily
(e.g., apartments and condominiums) and manufactured hous
residential market accounted for 81 percent of total cabinet d
2007 and will maintain this leading position through 2012. F
cabinet de ercent per annum
2012 to $ f cabinets per ho
will supp trends toward larg
and bathr rooms per unit, a
tinued pop ion rooms (e.g., h
laundry r ia rooms) in new
will supp New housing construction is
projected oviding growth opportunities.
As a resul d to outpace improvement and
repair app cent per annum through 2012
to reach $

In th where cabinets can be in-
stalled du f renovation projects, demand
is forecast 1.3 billion, accounting for 75
percent of total residential demand in 2012. Ongoing gains in residential improvement and repair spending, including kitchen and bathroom remodeling, will support demand for cabinets. Advances will also be aided by demographic and economic factors, such as an aging homeowner population with the financial wherewithal to finance home improvement projects, with many focusing on placing higher-end amenities into the home (e.g., semicustom and custom cabinets). The ongoing conversion of rooms to special-function spaces such as mudrooms, hobby/craft rooms and home offices will support cabinet demand. In addition, the aging US housing stock will provide a solid improvement and repair market for cabinets, bolstering gains. Furthermore, the increasing

SAMPLE TEXT

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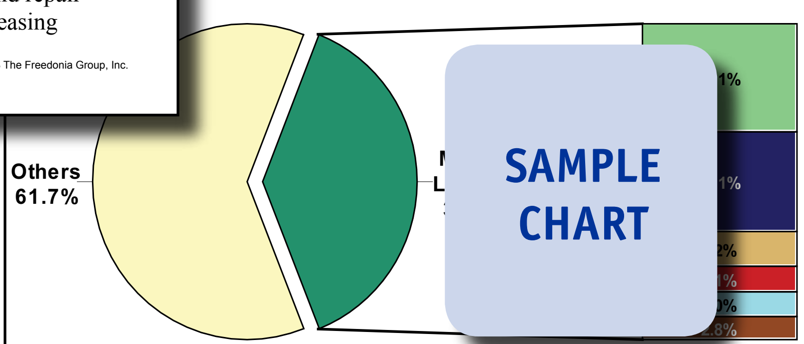
CHART VII-1

US CABINET MARKET SHARE, 2007
($15.3 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE IV-8

BATHROOM CABINET SHIPMENTS BY MARKET & TYPE
(million dollars)

Item	1997	2002	2007	2012	2017
Building Construction (bil $)					
$ cabinets/000$ construction					
Bathroom Cabinet Shipments					
By Market:					
Residential					
Nonresidential					
Other					
By Type:					
Vanity					
Other					
% bathroom					
Cabinet Shipments					

SAMPLE TABLE

COMPANY PROFILES

Canyon Creek Cabinet Company
16726 Tye Street Southeast
Monroe, WA 98272
206-674-0973
http://www.canyoncreek.com

Annual S
Employr

Key Proc ... kitchens, bathrooms,
home off ... ications

SAMPLE PROFILE

Can ... inet manufacturer that is ov ... anyon Creek specializes in th ... ss and framed style cabinetry for kitchens, bathrooms, home offices, entertainment centers, and other rooms in the home.

The Company produces cabinets in nearly 5,000 door style/finish combinations using maple, alder, beech, cherry, fir, hickory, oak, rustic alder, rustic hickory, rustic maple and rustic pine wood species, among others. Thermofoil and laminate products are also available. Cabinets from Canyon Creek are available in recessed-panel, raised-panel and contemporary types. Both recessed- and raised-panel doors are produced in mortise and tenon, thermofoil, applied molding and mitered styles. In addition, the Company's framed recessed- and raised-panel doors are made in beaded inset, inset and modified overlay varieties. The contemporary series from Canyon Creek offers laminate, slab and thermofoil door styles. Cabinetry from the Company is produced and sold through two product lines: CORNERSTONE and MILLENNIA.

274

"Through 2012, vanity shipments are forecast to increase 3.9 percent per year through 2012 to $1.3 billion. Advances will benefit from a recovery in new housing construction over the forecast period. Residential improvement and repair spending will continue to grow through 2012, aiding use of vanities. In addition, strong new nonresidential construction and remodeling activity will support use."

--Section IV, pg. 124

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Other Studies

Builders' Hardware

This study analyzes the US builders' hardware industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by material, product (e.g., hinges, handles, locks, keys, opening and closing devices, mail boxes, safes); application (e.g., cabinets, furniture, doors, windows, safety products); market (residential, nonresidential, nonbuilding); end use (new construction, improvements/repairs); and US region. The study also considers market environment factors, evaluates market share and profiles industry players.

#2379 .... 08/2008..................... $4600

Solid Surface Materials & Other Cast Polymers

US cast polymer demand will grow 3.6% annually through 2012. Gains will be driven by engineered stone based on its resistance to stains, impacts and moisture and its ability to have a wide range of colors and embedded materials. Solid surface products will remain the largest segment. This study analyzes the 222 million square foot US cast polymer industry, with forecasts for 2012 and 2017 by material, product, end use and regional market. It also evaluates company market share and profiles major players.

#2319 .... 04/2008..................... $4500

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 .... 01/2008..................... $4500

Molding & Trim

US demand for molding and trim will reach $11 billion in 2011. Gains will be supported by healthy nonresidential construction activity, especially in office and commercial buildings. Interior moldings will remain the largest product segment, while plastic molding and trim continues to supplant wood materials. This study analyzes the US molding and trim industry, with forecasts for 2011 and 2016 by material, product and market. The study also evaluates market share and profiles leading producers.

#2286 .... 12/2007..................... $4500

Residential Kitchen & Bathroom 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

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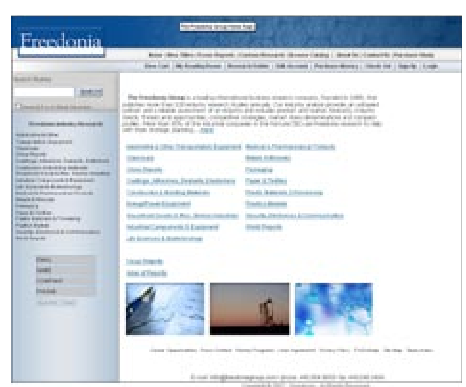

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