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Countertops

US Industry Study with Forecasts for **2013 & 2018**

Study #2552 | September 2009 | \$4800 | 361 pages

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Growth will be prompted by a rebound in housing construction, a large stock of countertops requiring replacement, and consumer desires to install larger, higher-value countertops.

US demand to rise 2.4% annually through 2013

US demand for countertops is forecast to increase 2.4 percent annually to 760 million square feet in 2013. Growth will accelerate from the pace of the 2003-2008 period, prompted by a rebound in housing construction from the depressed 2008 level. While the residential remodeling segment will post below-average advances in demand through 2013, gains will be promoted by the large stock of homes requiring countertop replacement, as well as the desire of consumers to renovate their kitchens and bathrooms by installing larger-sized countertops. In many cases, these additional countertops will be fabricated from higher-value materials, so that in value terms demand for countertops is expected to advance 4.6 percent per year to \$19.6 billion in 2013. Value gains will be promoted by the growing market penetration of high value countertop materials, primarily natural and engineered stone.

Engineered, natural stone countertops to lead gains

Countertops made from engineered and natural stone will experience the strongest gains through 2013. Consumers view these materials as durable, aesthetically pleasing surfaces that are highly resistant to scratches and extreme temperatures. Engineered stone will benefit from its resistance to biological contaminants and its resemblance to natural stone, while remaining impervious to moisture. Natural stone will

US Countertops Demand, 2008 (674 million square feet)



benefit from consumer interest in the luxury and style that granite and other types of stones offer. More homeowners will be willing to pay for these expensive materials to achieve the desired look in their homes. Laminate countertops will continue to account for the largest share of countertop sales. However, growth will be constrained by the rise of natural and engineered stone, as some consumers find laminates to be a low-end surfacing choice.

Residential market to continue to drive demand

In 2008, the residential market accounted for three-quarters of overall countertops demand. The residential market will

continue to drive countertop demand through 2013, reflecting the rebound in housing construction and continued consumer interest in installing high-value countertops. The nonresidential market is forecast to contract through 2013, as decreases in nonresidential construction spending will limit overall countertops demand. Best prospects for growth in the nonresidential countertops market will be the institutional segment, as medical and educational facilities install countertops in patient rooms, classrooms and food service areas. Countertops demand in nonbuilding applications is forecast to rise, spurred by rebounding production of recreational boats and vehicles, which often have countertops.

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Sample Text, Table & Chart

PRODUCTS

Demand by Market --Demand for bathroom construction applications is forecast to rise in 2013. This is a turnaround from the demand for bathroom countertop applications decreased 7.8 percent in 2008. Recovery of the US housing market is expected to return the levels experienced in 2007. Countertops to outfit the bathroom in these new homes.

Advances will also be derived from the continuing demand for homes with two or more full bathrooms, which will need more countertops for these rooms. As of 2008, nearly 60 percent of all US single-family homes had two or more bathrooms, while nearly 30 percent of all US single-family homes had three or more bathrooms. This is expected to continue, as homeowners appreciate the convenience of having multiple facilities. Indeed, for those with large homes, frequently host company, two or more bathrooms are a necessity.

Demand for bathroom countertops in new nonresidential building construction and new nonbuilding applications is expected to rise less than one percent annually through 2013 to 58 million square feet. Advances will be restrained by the weak nonresidential building construction market, which will cause many builders to reduce the size of, or cancel altogether, plans for building such bathroom-intensive structures as hotels, shopping facilities, restaurants and office buildings. However, many designers may opt for using less costly stand-alone sinks rather than countertops with installed sinks. However, demand is also restrained by the fact that virtually every nonresidential structure has some sort of bathroom facility, unlike kitchens, which are found in many types of nonresidential establishments. Thus, there is

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TABLE VI-8

SOUTH COUNTERTOPS DEMAND (million square feet)

Item	1998	2003	2008	2013	2018
South Housing Stock (mil units)	45.0	45.0	45.0	45.0	45.0
sq ft countertops/stock unit	100	100	100	100	100
South Countertops Demand	4,500	4,500	4,500	4,500	4,500
By Subregion:					
South Atlantic	1,500	1,500	1,500	1,500	1,500
East South Central	1,500	1,500	1,500	1,500	1,500
West South Central	1,500	1,500	1,500	1,500	1,500
By Market:					
Residential	3,500	3,500	3,500	3,500	3,500
Nonresidential Building	1,000	1,000	1,000	1,000	1,000
Nonbuilding	0	0	0	0	0
By Application:					
New	2,500	2,500	2,500	2,500	2,500
Remodeling	2,000	2,000	2,000	2,000	2,000
% South Countertops Demand	52.2	53.1	57.4	70.0	86.0

SAMPLE TABLE

CHART VII-1

US COUNTERTOP MATERIALS MARKET SHARE BY COMPANY, 2008 (505 million square feet)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-2
COUNTERTOPS DEMAND BY MATERIAL IN AREA TERMS
 (million square feet)

Item	1998	2003	2008	2013	2018
Bldg Construct Expend (bil \$)	5	5	5	5	5
sq ft countertops/000\$ bldg construct	170	170	170	170	170
Countertops Demand					
Laminates					
Solid Surface					
Natural Stone					
Engineered Stone					
Cast Polymers					
Tile					
Other					

**SAMPLE
TABLE**

COMPANY PROFILES

Rocksolid Granite USA Incorporated
 10360 USA Today Way
 Miramar, FL 33025
 954-435-5538
<http://www.granite-transformations.com>

Annual Sales:
 Employment:

Key Products: materials and glass mosaic tiles

Rocksolid Granite USA is a leading manufacturer of countertop surfacing materials. The Company, which is privately held, operates in the US through Granite Transformations (Miramar, Florida), a wholly owned subsidiary that provides countertop resurfacing services through a network of GRANITE TRANSFORMATIONS franchises.

The Company competes in the US countertops market via the manufacture and sale of TREND STONE engineered stone, TREND GLASS glass-based surfacing materials and TREND MOSAIC glass mosaic tiles. These materials are used in the fabrication of kitchen and bathroom countertops, vanity tops, and others that can be installed over existing laminate surfaces.

Rocksolid Granite USA's TREND STONE engineered stone is composed of 95-percent natural granite, with quartz and specialty resins composing the remaining content. This material forms durable, nonporous surfaces, which are designed to resist stains, heat, frost, abrasives and chemicals; and are available in 1/4-inch thick slab sizes of 121-1/4 inches by 49 inches. TREND GLASS glass-based surfacing

**SAMPLE
PROFILE**

“The remodeling market accounted for the vast majority of demand, totaling 83 percent in 2008. Through 2013, demand for countertops in the single-family remodeling market is forecast to rise 2.0 percent annually to 376 million square feet. This is a deceleration from the 2003-2008 period, when demand for countertops in single-family remodeling applications rose 4.2 percent per year.”

--Section V, pg. 196

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OTHER STUDIES

Hard Surface Flooring

US hard surface flooring demand will rise 4.6% yearly through 2013. Growth will be driven by ongoing gains on carpeting and the popularity of high-end and "green" materials. Laminate and wood flooring will offer the best opportunities, while new niche products such as bamboo, cork and eucalyptus flooring enjoy good prospects. This study analyzes the 7.7 billion square foot US hard surface flooring industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2493 07/2009..... \$4700

Decorative Laminates

Sales of decorative laminates in the US are forecast to reverse their downward trend and grow 2.1% annually through 2013. Gains will be sparked by increased demand from the flooring industry, while cabinets remain the leading market. The smaller high-pressure laminate segment will outpace the dominant low-pressure overlay market. This study analyzes the \$6.4 billion US decorative laminate industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2511 06/2009..... \$4700

Residential Kitchen & Bath Countertops in China

Demand for countertops in China will grow 4.6% annually through 2012. Kitchen countertops will remain dominant while bathroom applications grow the fastest. Solid surface types will continue to gain market share on natural stone, tile and laminates. The small engineered stone segment will post the fastest growth. This study analyzes the 65.7 million square meter countertop industry in China, with forecasts for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry players.

#2450 02/2009..... \$5100

Cabinets

US demand for cabinets will grow 3.9% annually through 2012. A rebound in new housing construction and building design trends that lead to greater cabinet use per residence will support gains. The dominant kitchen cabinet segment will further benefit from the rising use of kitchen-type cabinets in other rooms. This study analyzes the \$15.3 billion US cabinet industry, with forecast for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry competitors.

#2364 06/2008..... \$4700

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

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