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# World Residential Countertops

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

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Study #2585 | January 2010 | \$5800 | 354 pages

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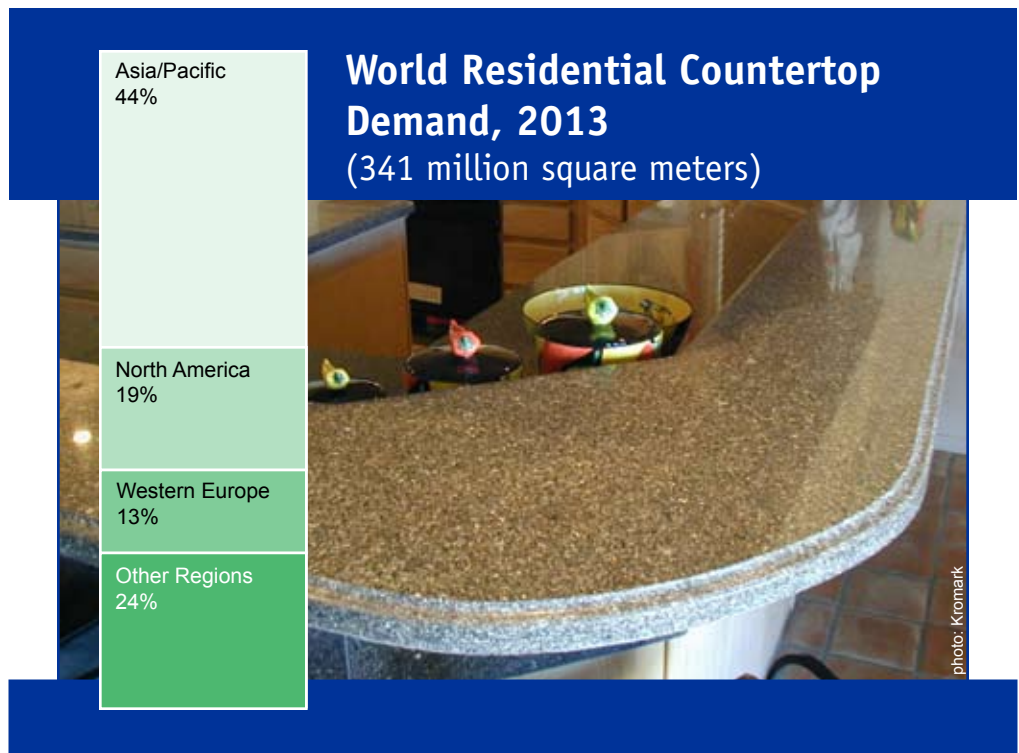
*Advances will be aided as developing countries continue to build large volumes of modern housing units, and as homeowners upgrade from free-standing furniture to conventional countertops.*

## Global demand to increase 3.3% yearly through 2013

Global demand for residential countertops is projected to increase 3.3 percent annually to 341 million square meters in 2013. Advances will be aided as countries such as Brazil, China and India continue to build large volumes of modern housing units each year to accommodate the needs of their growing populations. Gains will also be spurred by homeowners upgrading from free-standing furniture to conventional countertops in many parts of the world.

## Both new & remodeling markets to see similar gains

The remodeling market accounts for the larger share of global residential countertop sales. In the most general terms, this is because the size of the housing stock dwarfs the number of new homes built each year, so the potential market base is larger. Gains will also be spurred by the ongoing trend of upgrading from free-standing tables and shelves to conventional countertops and cabinetry, especially in the kitchen, in many parts of the world. The size of the remodeling market in a given region is determined by the relative wealth of the region and the relative maturity of the local housing market. Although it is a smaller market, the new construction market is expected to post similar gains to the remodeling market. Advances will be aided by the increasing average size of new homes in much of the world, coupled with a rising penetration of at least basic kitchen



countertops in new housing units. Markets in the US and parts of Western Europe will also benefit from the projected recovery in new housing units built through 2013, from a low 2008 base.

## India, China to pace key Asia/Pacific market

Advances in the Asia/Pacific region, the largest market, will be driven primarily by China, which accounted for nearly half of the region's residential countertop sales in 2008. Gains will stem from ongoing urbanization and the development of a more modern housing, as well as the expanding size of the country's housing stock, improving living standards and rising income levels, which will boost

remodeling sales. India is expected to post somewhat stronger gains through the forecast period as it also develops additional, modern housing to accommodate its population's needs and the continuing migration from rural areas to cities. However, gains in many of the least developed countries in the Asia/Pacific region will be limited by the small size of the homes, and the high cost of countertops relative to pedestal sinks and free-standing tables. North America was the second largest regional market in 2008. Advances are expected to be aided by the recovery of the US new housing market from a depressed 2008 base. Ongoing consumer preference for spacious kitchens and multiple bathrooms will also boost countertop sales.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Demand by Type & Market

Demand for residential countertops in China is expected to reach 1.1 billion square meters by 2018, primarily due to the launch of 10 million new housing units in the Asia/Pacific region. China holds a leading share of the global countertop market, and is moving forward, advanced residential building construction. Results are expected to be strong through 2013. The increasing average size of kitchen and bathroom will also bolster countertop demand. In the long run, the urbanization and modernization trends in China will also drive strong demand for countertops.

The countertop market in China will continue to be dominated by the new construction market through 2013, when sales in new applications will account for 63 percent of the market total in volume terms. New demand will benefit from more modern housing designs which feature larger kitchens and more bathrooms per unit, which provides extra market potential for the installation of kitchen or bathroom cabinets, boosting overall demand for countertops. New countertop expenditures will also benefit from rising personal income levels as homeowners are better able to afford built-in countertops over moveable furniture. However, slow population growth will restrain further growth through 2013.

Traditionally, Chinese homeowners focused less on home improvement projects due to issues such as low levels of private property ownership and low income levels, and the majority of countertop demand came from new construction activity as the country experienced a construction boom. However, countertop demand in the remodeling market is expected to achieve faster growth through 2013, aided by factors such as the increasing number of homeowners and the growing awareness of home improvement.

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TABLE VI-7

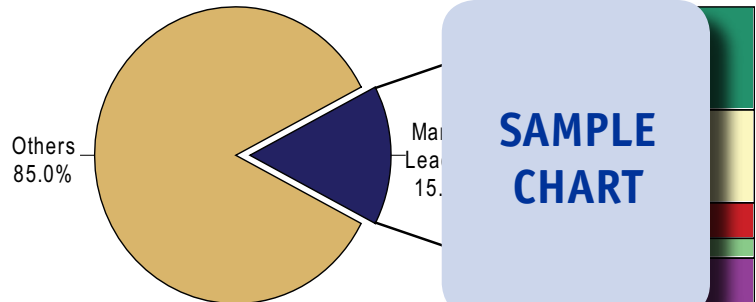
CHINA: RESIDENTIAL COUNTERTOP DEMAND BY TYPE & MARKET (million square meters)

Item	1998	2003	2008	2013	2018
New Housing Units (000)					10
sq m new countertops/new unit					6
Housing Stock (mil units)					10
sq m remodeled countertops/stock unit					7
China Countertop Demand					10
By Type:					
Kitchen					10
Bathroom					5
Other					5
By Market:					
New Construction					10
Remodeling					10

SAMPLE TABLE

CHART VIII-1

WORLD RESIDENTIAL COUNTERTOP MATERIALS MARKET SHARE BY COMPANY, 2008 (289.4 million square meters)



SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE VI-8**

**CHINA: RESIDENTIAL COUNTERTOP DEMAND BY MATERIAL**  
(million square meters)

Item	1998	2003	2008	2013	2018
Res Bldg Construction Expend (bil 2005 \$)	100	100	100	100	100
sq m countertops/mil \$ construction					
China Countertop Demand					
Laminates					
Solid Surface					
Natural Stone					
Engineered Stone					
Other					
% China					
Asia/Pacific Countertop Demand					



**COMPANY PROFILES**

**Roskopf & Partner AG**  
 Am Flugplatz Three  
 99996 Obermehler  
 Germany  
 49-36-0219-89  
 http://www.roskopf.com

Annual Sales:  
 Employment:

Key Products: engineered quartz and ceramic finished surfacing

**SAMPLE PROFILE**

Roskopf & Partner is a manufacturer and processor of glass-ceramic, laminate, solid surface, engineered quartz and ceramic surfacing materials. The privately held company also fabricates and distributes finished sheets and semi-finished products. Dekker Zevenhuizen BV (Netherlands) owns a minority interest in Roskopf & Partner.

The Company competes in the world countertop industry through the production of surfacing materials, finished sheets and semi-finished surfacing materials used in the fabrication of kitchen and bathroom countertops, work tops, and other surfaces. Many of the materials processed by Roskopf & Partner are sold under the XSYRO brand name. The Company also makes LAVANTO solid surface materials for basins, sinks and showers.

Roskopf & Partner makes R+P GLASKERAMIK glass-ceramic materials through a sintering process that forms highly polished, translucent kitchen and bathroom surfaces, including countertops and vanity

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“In 2008, solid surface countertops accounted for 49 percent -- the largest share -- of the countertop market. Solid surface materials benefit from being perceived as a higher-end product compared to traditional tiles and many types of natural stone. The segment also benefits from being less expensive than engineered stone, another high-end product. The improving quality of the solid surface materials available from China-based suppliers will also fuel growth.”  
 --Section VI, pg. 176

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**Solid Surface Materials & Other Cast Polymers**

US demand for cast polymers will increase 5.4% annually through 2014, driven in part by gains in market share over laminates in countertops. Solid surface will remain the most common cast polymer, while engineered stone will grow the fastest. The countertop market will remain dominant. This study analyzes the 166.1 million square foot US cast polymer industry, with forecasts for 2014 and 2019 by material, product, end use and US region. It also evaluates company market share and profiles industry players.  
 #2646 .....June 2010 ..... \$4900

**Decorative Tile**

US demand for decorative tile is forecast to increase 4.4% per year through 2013. Flooring will remain the dominant application. The residential construction market will generate the most rapid gains in tile demand, as housing completions rebound and consumer spending on improvement and repair projects increases. This study analyzes the 2.7 billion square foot US decorative tile industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates company market share and profiles industry players.  
 #2580 .....December 2009 ..... \$4800

**Countertops**

US demand for countertops is forecast to rise 2.4% yearly through 2013. Products made from engineered and natural stone will grow the fastest while laminates remain the largest segment. The residential market will remain dominant based on a rebound in housing construction and continued consumer interest in high-value countertops. This study analyzes the 674 million square foot US countertop industry, with forecasts for 2013 and 2018 by material and market. It also evaluates market share and profiles industry players.  
 #2552 .....September 2009..... \$4800

**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 .....June 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 .....February 2009..... \$5100

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