INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Solid Surface Materials & Other Cast Polymers

US Industry Study with Forecasts for **2014 & 2019**

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Solid Surface Materials & Other Cast Polymers

US Industry Study with Forecasts for ***2014 & 2019***

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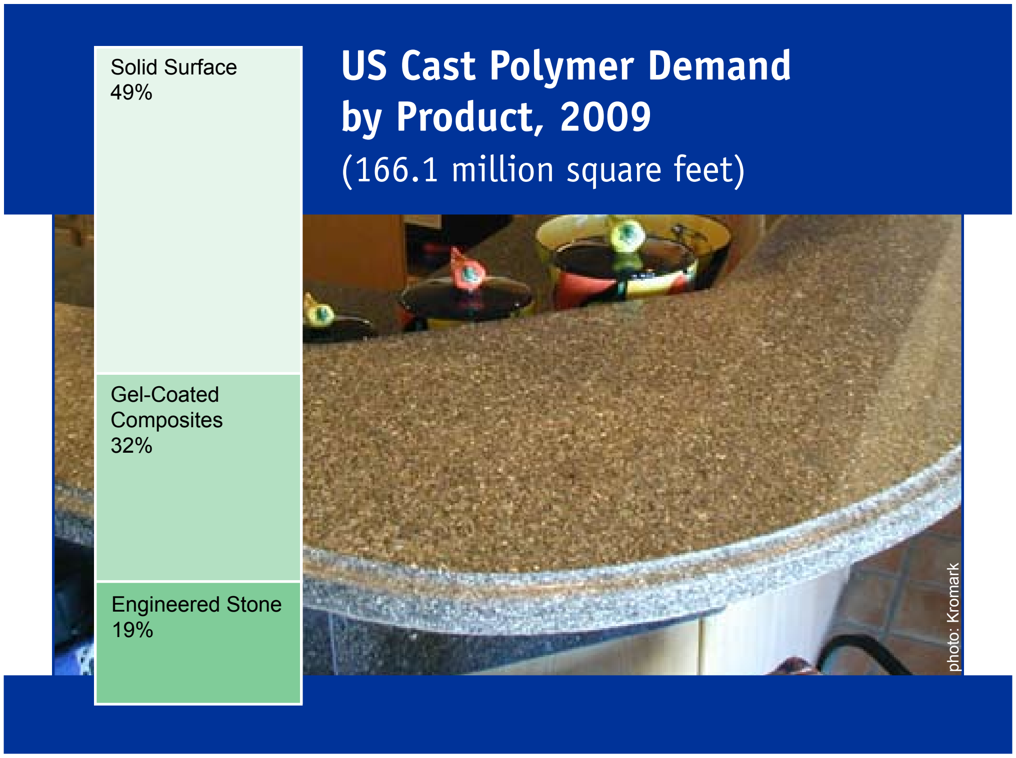
A rebound in housing completions will be an important driver of demand growth, as will the supplantation by cast polymers of more traditional surfacing materials in residential countertops.

US demand to increase 5.4% yearly through 2014

Demand for cast polymers in the US is forecast to increase 5.4 percent annually through 2014 to 216 million square feet. A rebound in housing completions from the depressed levels of 2009 will be an important driver of demand growth. In addition, cast polymers will seize market share from more traditional decorative surfacing materials such as laminates, especially in the residential countertop market. Cast polymer countertops offer minimal maintenance requirements as well as resistance to stains, impact, moisture and other damage caused by wear and tear. Imports are projected to account for 26 percent of cast polymer demand in 2014, up from 20 percent in 2009. Many producers, especially those based in Asia, will take advantage of that region's lower labor costs to produce solid surface materials and engineered quartz for export to the US market. Moreover, limited US engineered quartz production capacity will create additional opportunities for offshore producers.

New housing segment to pace countertop market

The countertop market will account for 85 percent of cast polymer demand in 2014. The new housing segment will provide the most rapid gains, as housing completions rebound and builders looking to make homes more marketable increasingly choose cast polymer countertops instead of laminates or tile.



Nevertheless, the residential improvement and repair segment will continue to account for the majority of cast polymer countertop demand. Design trends that call for larger kitchens and multiple bathrooms will also promote demand. In nonresidential countertop applications, solid surface materials will make gains in institutional settings such as hospitals and schools, because these materials resist biological contamination.

Engineered stone to be fastest growing product

Demand for engineered stone is projected to advance 11.0 percent annually to 2014, the fastest growth of any cast polymer product. Consumers will choose engineered stone surfacing because it resembles natural stone, and because they view it as a high-end material that adds value to a home. Solid surface materials will continue to account for the largest share of demand for cast polymers, with 44 percent of the total market in 2014. However, these materials are forecast to have the slowest growth rate of all cast polymers. Competition from natural and engineered stone surfacing, which are seen as more aesthetically appealing materials by many homeowners, will limit gains for solid surface materials. However, because they are less expensive than natural and engineered stone grades, solid surface materials will still appeal to value-conscious consumers.

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Sample Text, Table & Chart

END USES

Nonresidential

Sales of cast polymer countertops in the nonresidential b
construction market ar SAMPLE TEXT percent per
million square feet in orted by ad
institutional construct g office and
cial construction expe of the mark
cast polymer countert talled. Fur
will be promoted by th the perform
efits of cast polymers. are nonporo
and resistant to stains and impact.

Cast polymer countertops are preferred in some nonresi
building construction applications because of their impervio
biological contamination. The materials' naturally smooth surfaces are free of pores, grooves or graining that catch particles that can lead to bacterial growth. The polymer resin binders of solid surface materials and engineered stone surfacing also inhibit bacteria. Many cast polymer producers attempt to market their products as ideal for use in environments where a high degree of cleanliness is preferred. Cambria promotes its engineered stone as certified by the National Sanitation Foundation (NSF) for use in food and splash zones in commercial kitchens, and DuPont advertises that its CORIAN solid surface has certification as well. Cosentino manufactures its SILESTONE engineered quartz with MICROBAN (Microban International) incorporated into the material so that it has antimicrobial protection against most common bacteria, yeasts, molds and fungi.

Cast polymers that feature alumina trihydrate fillers (m
faces and cultured onyx) are fire resistant and have a Class I
These performance attributes allow cast polymers to meet or
ous building codes. Another benefit involves aesthetics; cast
provide the appearance of natural stone and other specialty s

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TABLE IV-1

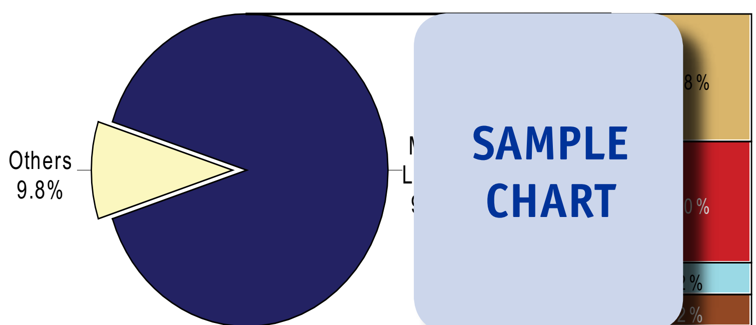
CAST POLYMER SUPPLY & DEMAND
(million square feet)

SAMPLE TABLE

Item	1999	2004	2009	2014	2019
Building Construction Expend (bil 2005					38
sq ft cast polymer/mil $ construction					1
Cast Polymer Demand					0
Solid Surface					0
Gel-Coated Composites					0
Engineered Stone					0
- net imports					0
Cast Polymer Shipments					0
Solid Surface					0
Gel-Coated Composites					5
Engineered Stone					.5

CHART IV-4

ENGINEERED STONE MARKET SHARE BY COMPANY
(31.4 million square feet, 2009)



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Sample Profile, Table & Forecast

TABLE VI-8

SOUTH CAST POLYMER DEMAND
(million square feet)

Item	1999	2004	2009	2014	2019
South Construction Expend (bil 2005$)					3.5
sq ft cast polymer/mil $ construction					3
South Cast Polymer Demand					.5
By Subregion:					
South Atlantic					.5
East South Central					.0
West South Central					.0
By Market:					
Residential					.0
Nonresidential					.6
Nonconstruction					.9
% South					.6
Cast Polymer Demand	1				.0

SAMPLE TABLE

COMPANY PROFILES

Swan Corporation
515 Olive Street, Suite 1800
St. Louis, MO 63101
314-231-8148
http://www.theswancorp.com

Annual Sales
Employment

Key Products ... ecorative surfaces and cor...

SAMPLE PROFILE

Swan Corpor... materials, as well as fiberg... ential and commercial bathro... vately held company has a manufacturing facility in Centralia, Illinois, and distributes products via dealers in the US and Europe.

The Company participates in the US cast polymer industry through the manufacture of SWANSTONE and VERITEK compression-molded, reinforced solid surface materials, and through the fabrication of decorative surfaces and components. Swan's solid surface materials are composed of acrylic resins and mineral fillers. These durable, nonporous materials are resistant to stains, scratches, chips, cracks, impacts, chemicals, high temperatures and the growth of mold, mildew and bacteria. SWANSTONE solid surface materials are available in nearly 40 colors and VERITEK solid surface materials are offered in six shades, including solid and stone-like varieties. These materials can have standard, high-gloss or textured surfaces.

Fabricated components made by Swan include countertops, island tops, tabletops, vanity tops and sinks, kitchen sinks, bathtub and shower

299

"Demand for cast polymers in the nonresidential building construction segment is projected to advance 4.0 percent per year to 14 million square feet in 2014. Gains will be spurred by the region's rising population, which will encourage the construction of offices and commercial space, retail sites, schools, hospitals, government buildings and related structures. In the nonbuilding sector, demand gains will be promoted by rebounding boat shipments from the low 2009 level, as well as by ..."
--Section VI, pg. 204

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Other Studies

Cabinets

US demand for cabinets is forecast to expand 7.4% annually to 2014, spurred by a rebound in housing completions from depressed 2009 levels. The expected recovery in residential building construction will support demand gains for all cabinet types, especially kitchen and bathroom cabinets. This study analyzes the $10.6 billion US cabinets industry, with forecasts for 2014 and 2019 by material, product, market and geographic region. It also evaluates company market share and profiles industry players.

#2663 .... August 2010 .... $4900

World Solid Surface & Other Cast Polymers

Global demand for cast polymers is projected to increase 8.7% annually through 2014. About 60% of the gains will be from China, with its quickly developing domestic cast polymer industry and considerable construction sector. Engineered quartz and marble will grow the fastest. This study analyzes the 169 million square meter world cast polymer industry, with forecasts for 2014 and 2019 by product, application, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2650 .... July 2010 .... $5800

World Residential Countertops

Global home countertop demand will rise 3.3% yearly through 2013. The Asia/Pacific region will remain the largest market, led by gains in China and India. Laminate, solid surface and natural stone will remain key material types, while engineered stone will grow the fastest. This study analyzes the 289 million square meter world residential countertop industry, with forecasts for 2013 and 2018 by material, type, market, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2585 ....January 2010 .... $5800

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

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