

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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Solid Surface Materials & Other Cast Polymers

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

Study #2646 | May 2010 | \$4900 | 317 pages



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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Demographic Trends	8
Consumer Trends	11
Personal Income & Expenditures	12
Consumer Financing	14
Building Construction	17
Residential Buildings.....	20
Housing Completions	22
Housing Stock	27
Improvements & Repairs.....	31
Nonresidential Buildings	32
Building Type	32
Improvements & Repairs.....	35
Environmental Considerations	36
Training & Standards	38
Historical Market Trends.....	39
Competitive Materials	41
Laminates	42
Natural Stone.....	43
Other Materials.....	45
World Market	46
Western Europe	47
Asia/Pacific	48
Other Regions	50
Foreign Trade	51
Solid Surface.....	53
Gel-Coated Composites	55
Engineered Stone	55

MATERIALS

General	57
Marble & Related Materials	59
Resins	62
Polyester.....	63
Acrylic	65
Alumina Trihydrate.....	66
Quartz & Other Stone.....	67
Other Materials	69

PRODUCTS

General	72
Area Outlook.....	73
Value Outlook	77
Solid Surface Materials.....	79
Area Outlook.....	79
Value Outlook	81

Characteristics	82
Types.....	85
Acrylic.....	85
Polyester & Polyester/Acrylic Blends.....	89
Market Share.....	92
Pricing Trends	96
Historical Pricing	97
Pricing Forecast	98
Gel-Coated Composites	100
Area Outlook.....	100
Value Outlook	102
Characteristics	103
Types.....	105
Cultured Marble.....	105
Other Gel-Coated Composites	107
Pricing Trends	109
Engineered Stone.....	111
Area Outlook.....	111
Value Outlook	113
Characteristics	115
Types.....	117
Quartz.....	117
Others	121
Market Share.....	123
Pricing Trends	127

END USES

General	129
Countertops	130
Residential	132
New Construction	136
Remodeling	138
Demand by Housing Type.....	141
Nonresidential.....	150
Institutional.....	152
Office & Commercial.....	155
Other Nonresidential Buildings	157
Nonbuilding Countertops	159
Other Building Applications	161
Kitchen & Bathroom Sinks	162
Kitchen Sinks	166
Bathroom Sinks.....	167
Other Bathroom Applications.....	168
All Other Building Applications	171
Other	174

REGIONAL MARKETS

General	177
Regional Demographic & Economic Activity...	178
Population Patterns	178
Economic Outlook.....	180
Construction Activity.....	182
Housing Trends	185

Regional Demand for Cast Polymers.....	187
Northeast	192
New England	195
Middle Atlantic	196
Midwest	197
East North Central	200
West North Central	200
South	201
South Atlantic	205
East South Central.....	207
West South Central	208
West.....	209
Mountain	212
Pacific.....	214

INDUSTRY STRUCTURE

General	216
Industry Composition	217
Market Share	221
Competitive Strategies.....	227
Research & Development.....	229
Marketing	231
Distribution	234
Mergers, Acquisitions & Competitive Agreements	237

COMPANY PROFILES

AGCO Marble.....	242
Aristech Acrylics	243
Baker (Craig) Marble.....	246
BLANCO GmbH	248
Breton SpA	250
CaesarStone	252
Cambria.....	254
CCM Enterprises	255
Central Marble Products.....	257
Cheil Industries	258
Chemcore Industries	260
Cosentino SA.....	261
Custom Marble	264
DuPont (EI) de Nemours.....	265
EOS Surfaces	267
Fama Industries	268
Fletcher Building	269
Halstead International.....	271
Hanwha Group	272
Illinois Tool Works.....	275
InPro Corporation	277
International Marble.....	279
K&K Langham	281
Lehigh Surfaces	283

(continued on following page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

LG Chem	284
LG Hausys.....	285
Majestic Marble & Glass.....	287
Marbled Elegance.....	289
Marmol Compac	290
Meganite Incorporated.....	292
Princess Marble.....	293
Royal Baths Manufacturing	294
Royal Stone Industries.....	295
Santa Margherita	296
Swan Corporation.....	299
Syn-Mar Products	300
Technistone AS.....	302
Tiffany Marble	303
Tower Industries	305
Transolid Incorporated.....	307
United States Marble	309
Venetian Marble.....	311
Additional Companies Mentioned in Study.....	313

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators	8
2 Population & Households.....	11
3 Personal Consumption Expenditures	13
4 Consumer Financing Environment, 1999-2009.....	17
5 Building Construction Expenditures.....	20
6 Residential Building Construction Expenditures	22
7 New Housing Indicators	27
8 Housing Stock by Type	30
Cht Year of Construction of Housing Stock, 2009	30

9 Residential Improvement & Repair Expenditures	32
10 Nonresidential Building Construction Expenditures.....	35
11 Nonresidential Building Improvement & Repair Expenditures	36
12 Cast Polymer Market, 1999-2009.....	41
Cht Global Cast Polymer Market, 2009	47
13 Foreign Trade in Cast Polymers	53

MATERIALS

1 Materials Demand in Cast Polymers.....	58
Cht Materials Demand in Cast Polymers, 2009.....	59
2 Marble & Related Materials Demand in Cast Polymers	62
3 Resin Demand in Cast Polymers	63
4 Alumina Trihydrate Demand in Cast Polymers	67
5 Quartz & Other Stone Demand in Cast Polymers	69
6 Other Materials Demand in Cast Polymers ..	71

PRODUCTS

1 Cast Polymer Supply & Demand.....	75
Cht Cast Polymer Supply & Demand by Product, 2009	76
2 Cast Polymer Demand by Value	78
Cht Cast Polymer Demand by Value, 2009.....	78
3 Solid Surface Material Supply & Demand ..	80
4 Solid Surface Demand by Value.....	82
5 Acrylic-Based Solid Surface Demand	89
6 Polyester & Polyester/Acrylic Blends Solid Surface Demand	92
Cht Solid Surface Market Share by Company, 2009.....	93
7 Gel-Coated Composites Supply & Demand.....	102
8 Gel-Coated Composites Demand by Value	103
9 Cultured Marble Surfacing Demand	107
10 Other Gel-Coated Composites Demand....	109
11 Engineered Stone Supply & Demand	113
12 Engineered Stone Demand by Value.....	114
13 Engineered Quartz Demand	120
14 Other Engineered Stone Demand.....	123
Cht Engineered Stone Market Share by Company, 2009.....	124

END USES

1 Cast Polymer Demand by End Use.....	130
2 Cast Polymer Countertop Demand by Market	132

3 Residential Cast Polymer Countertop Demand by Market	136
4 New Residential Construction Cast Polymer Countertop Demand.....	138
5 Remodeling Residential Cast Polymer Countertop Demand	141
6 Residential Cast Polymer Countertop Demand by Housing Type	142
7 Single-Family Housing Cast Polymer Countertop Demand	144
8 Multifamily Housing Cast Polymer Countertop Demand	147
9 Manufactured Housing Cast Polymer Countertop Demand	149
10 Nonresidential Building Construction Cast Polymer Countertop Demand by Market	152
11 Institutional Building Cast Polymer Countertop Demand	155
12 Office & Commercial Building Cast Polymer Countertop Demand	157
13 Other Nonresidential Building Construction Cast Polymer Countertop Demand	159
14 Nonbuilding Cast Polymer Countertop Demand.....	160
15 Other Building Surfaces Demand for Cast Polymers	162
16 Kitchen & Bathroom Sink Demand for Cast Polymers	166
17 Other Bathroom Applications Demand for Cast Polymers	171
18 All Other Building Applications for Cast Polymers	174
19 Other End Uses for Cast Polymers.....	176

REGIONAL MARKETS

1 Population by Region.....	180
2 Gross Domestic Product by Region.....	182
3 Construction Expenditures by Region.....	184
4 Regional Housing Indicators	187
5 Cast Polymer Demand by Region	191
Cht Cast Polymer Demand by Region, 2009 ..	192
6 Northeast Cast Polymer Demand.....	195
7 Midwest Cast Polymer Demand.....	199
8 South Cast Polymer Demand.....	205
9 West Cast Polymer Demand	212

INDUSTRY STRUCTURE

1 US Cast Polymer Sales by Company, 2009	220
Cht US Cast Polymer Market Share by Company by Value & Area, 2009	223
2 Selected Cooperative Agreements.....	239

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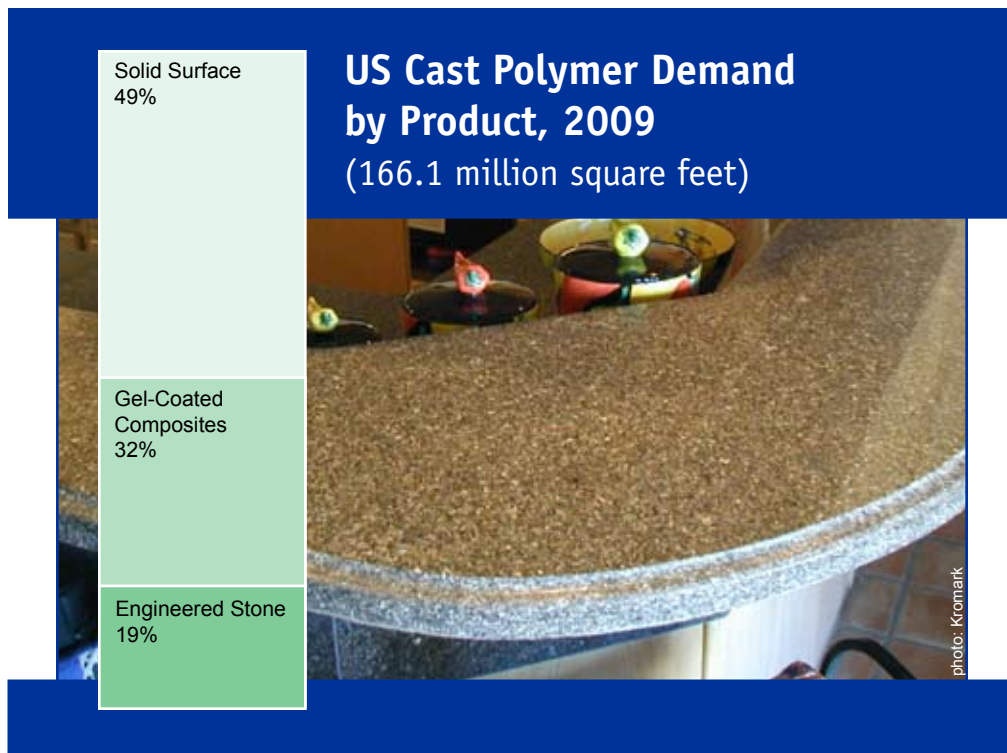
A rebound in housing completions will be an important driver of demand growth, as will the supplantation by cast polymers of more traditional surfacing materials in residential countertops.

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.

Sample Text, Table & Chart

END USES

Nonresidential

Sales of cast polymer countertops in the nonresidential building construction market are expected to reach 1.1 billion square feet in 2010, up from 1.0 billion in 2009. Institutional construction, commercial construction, and special construction expenditures are expected to drive the market for cast polymer countertops. The market will be promoted by the performance benefits of cast polymers. They are nonporous and resistant to stains and impact.

Cast polymer countertops are preferred in some nonresidential building construction applications because of their imperviousness to 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 (metals, faces and cultured onyx) are fire resistant and have a Class I fire rating. These performance attributes allow cast polymers to meet or exceed various building codes. Another benefit involves aesthetics; cast polymers provide the appearance of natural stone and other specialty surfaces.

150

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SAMPLE
TEXT

TABLE IV-1

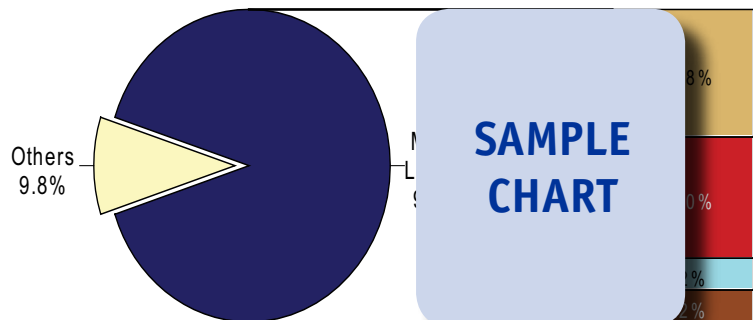
CAST POLYMER SUPPLY & DEMAND
(million square feet)

Item	1999	2004	2009	2014	2019
Building Construction Expend (bil 2005 \$)	38	41	45	48	51
sq ft cast polymer/mil \$ construction	1	1	1	1	1
Cast Polymer Demand	0	0	0	0	0
Solid Surface	0	0	0	0	0
Gel-Coated Composites	0	0	0	0	0
Engineered Stone	0	0	0	0	0
- net imports	0	0	0	0	0
Cast Polymer Shipments	0	0	0	0	0
Solid Surface	0	0	0	0	0
Gel-Coated Composites	5	5	5	5	5
Engineered Stone	5	5	5	5	5

SAMPLE
TABLE

CHART IV-4

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

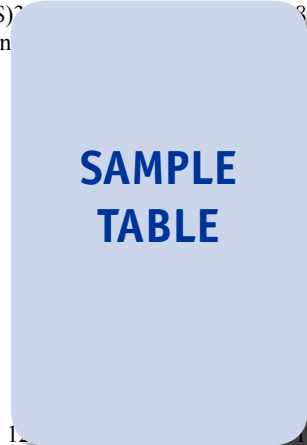


SAMPLE
CHART

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\$) ¹	13.5	13.3	13.5	14.0	14.0
sq ft cast polymer/mil \$ construction	0.0	0.0	0.0	0.0	0.0
South Cast Polymer Demand	0.0	0.0	0.0	0.0	0.0
By Subregion:					
South Atlantic	0.0	0.0	0.0	0.0	0.0
East South Central	0.0	0.0	0.0	0.0	0.0
West South Central	0.0	0.0	0.0	0.0	0.0
By Market:					
Residential	0.0	0.0	0.0	0.0	0.0
Nonresidential	0.0	0.0	0.0	0.0	0.0
Nonconstruction	0.0	0.0	0.0	0.0	0.0
% South Cast Polymer Demand	1.0	1.0	1.0	1.0	1.0



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
 faces and cor

Swan Corporation manufactures solid surface materials, as well as fiberglass reinforced plastic (FRP) material and commercial bathroom fixtures. Swan Corporation is a privately held company with 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, table tops, vanity tops and sinks, kitchen sinks, bathtub and shower

299

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“Demand for cast polymers in the non-residential 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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