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World Solid Surface & Other Cast Polymers

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

Study #2650 | July 2010 | \$5800 | 362 pages

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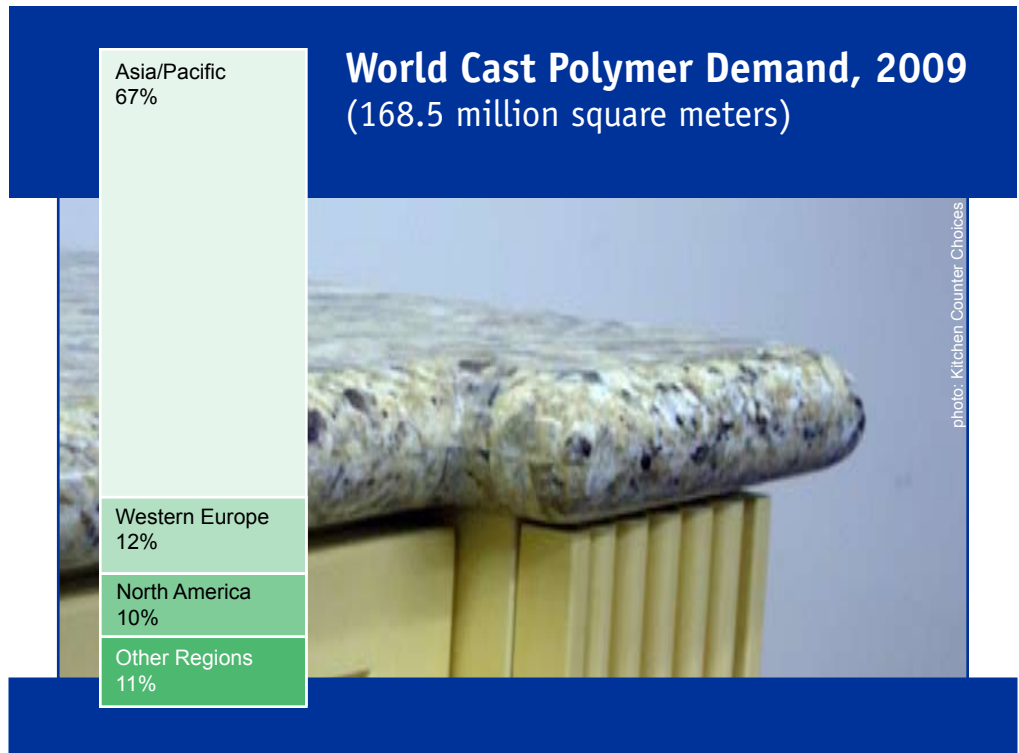
Approximately 60 percent of gains in demand will be attributable to China, a country with a quickly developing domestic cast polymer industry and a considerable construction sector.

Global demand to rise 8.7% yearly through 2014

Global demand for cast polymers is projected to increase 8.7 percent annually to 256 million square meters in 2014. Approximately 60 percent of the gains will be attributable to China, a country with a quickly developing domestic cast polymer industry and a considerable construction sector. China, along with other developing countries such as Brazil and India, has been building large volumes of modern housing units and nonresidential facilities each year to accommodate the needs of its growing population and ongoing economic development. Global demand growth will also be aided by the recovery of new housing construction in the US and much of Western Europe, as well as Australia, Japan and South Korea, from low 2009 bases. Compared to many other types of surfacing materials, cast polymers benefit from performance advantages as well as design flexibility.

Engineered stone to achieve most rapid gains

In 2009, solid surface accounted for 65 percent of global cast polymer sales. Approximately three-quarters of solid surface materials were sold in the Asia/Pacific region, where they are low-cost options because of limited color offerings and a highly competitive local production base. Engineered stone is expected to achieve the most rapid gains in demand through 2014, albeit from a much smaller



base. Although it was historically used primarily in the most developed countries, its market penetration is increasing in nonresidential installations in developing areas. Less expensive, but less durable gel-coated composites are projected to see more modest gains through 2014.

Asia/Pacific region to remain dominant market

Advances in the dominant Asia/Pacific market are primarily driven by China, which accounted for 71 percent of the region's cast polymer sales in 2009. Gains will stem from residential trends such as the country's ongoing urbanization and the development of a more

modern housing stock, as well as the continued expansion and improvement of nonresidential building stock. The rapid development and continued rise of a local industry will further increase market competition and cut prices. India is expected to see somewhat stronger gains through the forecast period as it also develops additional and more modern housing, schools, hospitals, transportation terminals and other facilities to accommodate its growing population and continued development. However, gains, particularly in many of the least developed countries of the world, will be limited by the typically small size of the homes, and the limited ability to finance the use of higher-value building materials like cast polymers.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Demand by Type

Sales of cast polymers in India are forecast to increase square meters in 2014. This is the fa along the countries in the Asia/Pacific hat of China, albeit from a much sm in large part by the rapidly expandi ularly the residential segment whereorporates built-in countertops instea styles modernize and personal incomes Demand for cast polymers will be boosted by consumer inter durable, functional and stylish building materials; cast polym durable, seamless and high-value, and viewed as stylish. Sim penetration is low in India, a market with a large population housing stock, there is significant potential for growth. Addi increasing number of domestic producers will provide furthe tion to reduce the price of these materials, instead of relying on imported versions.

In 2009, solid surface accounted for 53 percent of cast polymer sales in India. Neospar Concept is one of the leading domestic companies involved in the solid surface industry, producing SOLYX brand solid surface materials and fabricating a variety of items from it. Bonito Surfaces is another leading domestic participant. The company produces ECOCIEN solid surface wall panels in a variety of designs and relief features, and GRACIEN polyester solid surface sheets.

Engineered stone is expected to achieve the fastest annu through 2014, more than doubling the 2009 level, albeit from base. Advances will be driven by general factors such as co growth in building construction expenditures and strength in economy, as well as ongoing increases in the standard of livi many citizens. However, more specific factors include rising

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TABLE VI-9

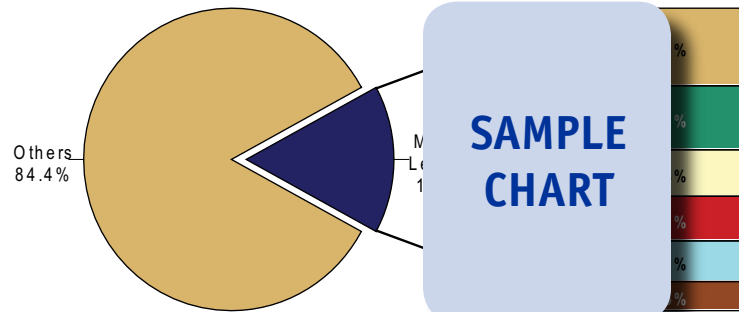
INDIA: MARKET ENVIRONMENT FOR CAST POLYMERS (billion 2008 dollars)

Item	1999	2004	2009	2014	2019
Resident Population (million)	10	11	12	13	14
GDP/capita	100	150	200	250	300
Gross Domestic Product	1000	1650	2400	3250	4200
persons/household	3	3	3	3	3
Households (million)	333	333	333	333	333
Personal Consumption Expenditures	1000	1650	2400	3250	4200
Building Construction Expenditures:					
Residential Building	600	1000	1500	2000	2500
Nonresidential Building	400	650	900	1250	1700
New Housing Units (000)	500	1000	1500	2000	2500
sq meter/new unit	10	10	10	10	10
New Housing Floor Space (mil sq meters)	5000	10000	15000	20000	25000
sq m cast polymer/mil \$ construction	5	5	5	5	5
Cast Polymer Demand (mil sq meters)	25000	50000	75000	100000	125000

SAMPLE TABLE

CHART VIII-1

WORLD CAST POLYMER MARKET SHARE BY COMPANY (168.5 million square meters, 2009)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-11
INDIA: CAST POLYMER DEMAND BY APPLICATION
 (million square meters)

Item	1999	2004	2009	2014	2019
Building Construction Exp (bil 2008\$): sq m cast polymer/mil \$ construction					
India Cast Polymer Demand					
Residential Countertops					
Nonresidential Countertops					
Sinks					
Other Building Applications					
All Other Applications					



COMPANY PROFILES

Scheer Surface Solutions GmbH
 Maierhofstrasse 28
 73547 Lorch
 Germany
 49-71-72-9130
 http://www.3s-scheer.de

Annual Sales
 Employee

Key Products: materials

Scheer Surface Solutions materials at a facility in Lorch serves customers worldwide

SAMPLE PROFILE

The Company is active in the world cast polymer industry through the production of OREOLITE engineered quartz and OREOLAN solid surface materials. OREOLITE engineered quartz is composed of 85 percent quartz, with the remaining content comprising resin binders, fillers, pigments and other additives. This nonporous material is available in minimal thicknesses of 4 millimeters, with polished or matte finishes, and featuring resistance to abrasions, scratches, various chemicals, dirt, moisture and bacteria.

Scheer Surface Solutions' OREOLAN solid surface materials are made from a blend of acrylic, aluminum hydroxide, pigments and fillers that form nonporous surfaces. These surfaces are designed to be food safe; hypoallergenic; and resistant to various chemicals, dirt, moisture and bacteria. Typically, OREOLITE engineered quartz and OREOLAN solid surface materials are used in the fabrication of flooring, walls, countertops, and other structures and surfaces in residential,

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"In 2009, the other building applications segment was the second largest, accounting for one-quarter of cast polymer sales in India. Additionally, this segment is expected to achieve the fastest annual growth through 2014. Gains will be spurred by interest in using engineered stone in flooring, bathroom surfaces, staircases and a variety of architectural embellishment applications such as fireplace mantles, moldings and other trim work. For instance, ..."

--Section VI, pg. 190

OTHER STUDIES

World Housing

Global demand for new housing will rise 3% yearly to 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8% yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 September 2010..... \$5300

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

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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