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Countertops

US Industry Study with Forecasts for **2015 & 2020**

Study #2788 | September 2011 | \$5100 | 374 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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In value terms, gains in US countertop demand will be aided by the growing market penetration of high-end countertop materials, such as natural stone and engineered stone.

US demand to rise 4.8% annually through 2015

US demand for countertops is forecast to advance 4.8 percent per year to 760 million square feet in 2015, valued at \$24.6 billion. A recovery in new housing construction will drive countertop demand, while in the larger remodeling market lower unemployment and greater credit availability will provide incentive for consumers to reinvest in their homes, including countertop installation as part of a kitchen or bathroom remodel. In value terms, gains will be aided by the growing market penetration of high-end countertop materials, such as natural stone and engineered stone.

New housing, remodeling to boost residential market

The residential market dominates countertop demand despite being unfavorably impacted by a decrease in residential improvement and repair expenditures and the collapse of new housing construction between 2005 and 2010. Gains in demand for countertops in the residential market will be promoted by a rebound in housing completions from the depressed levels of 2010. Not only will an increase in housing completions boost demand for countertops in area terms, but homebuilders looking to make their homes more marketable will add such amenities as higher-value countertop materials, including natural stone, engineered stone and solid surface countertops. Through 2015, the



large remodeling segment will also support gains in the residential market, as residential improvement and repair expenditures are set to increase, given that kitchen and bathroom renovation projects are among the most common home improvement projects. Homeowners frequently replace older or worn countertops and vanity tops with more attractive and larger-sized surfaces during renovation projects.

Increases in nonresidential construction and transportation equipment production will provide opportunities in the smaller nonresidential and nonbuilding countertop markets. Good prospects in the nonresidential countertop market will be found in the office and commercial

segment, as these buildings incorporate countertops in lunchrooms, other food service areas, and bathrooms.

Engineered, natural stone to be fastest growing countertop materials

Laminate countertops will continue to lead the market, in both value and area terms, but countertops made from engineered and natural stone will experience the fastest gains through 2015. Consumers view engineered and natural stone materials as durable, aesthetically pleasing surfaces that are highly resistant to scratches and extreme temperatures.

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Sample Text, Table & Chart

PRODUCTS

Demand by Market -- The residential market dominates countertop demand in remodeling applications in 2010 with 90 percent of the total. Through 2015, demand for kitchen countertops is expected to increase by 15 percent per year. Many people are remodeling their kitchens to include islands, breakfast nooks, and dining bars. Another trend positively affecting kitchen countertop demand is the increased perception of the kitchen as a family gathering place. In addition to increasing the overall size of the kitchen to accommodate such activities as cooking and eating together, home remodelers add countertops and breakfast bars to prompt family gatherings.

Rising demand for kitchen countertops in residential remodeling construction applications will also be encouraged by homeowners looking to improve the aesthetic properties of their kitchens. Many homeowners believe that countertops made from high-end materials enhance the appearance and value of a home. Replacing older countertops with surfaces made from high-value materials is a relatively easy way to improve the look of a kitchen because it is a large and highly visible part of the room. Other homeowners choose to remodel as their style preferences change, selecting a new color or pattern.

In the residential market, homeowners often look for countertop materials that are attractive yet durable, resistant to damage from frequent wear and tear, and easy to clean and maintain. Many homeowners choose to mix and match surfacing materials. Consumer demand for high-end materials on islands or countertop extensions where

153

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TABLE V-2

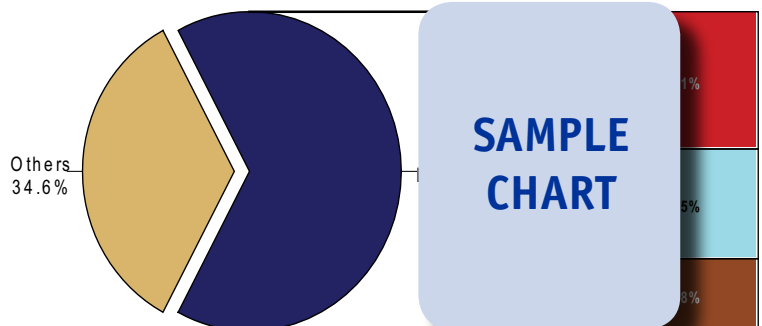
RESIDENTIAL COUNTERTOP DEMAND BY PRODUCT & APPLICATION (million square feet)

Item	2000	2005	2010	2015	2020
Residential Construction (bil 2005\$)	104	140	80	150	55
sq ft countertop/mil \$ construction	14	80	150	210	30
Residential Countertop Demand					
By Product:					
Kitchen					
Bathroom					
Other					
By Application:					
New					
Remodeling					
\$/sq ft					
Residential Countertop Demand (mil \$)	10400	14080	15055	21030	26400

SAMPLE TABLE

CHART VII-4

LAMINATE COUNTERTOP MATERIALS MARKET SHARE (338 million square feet, 2010)

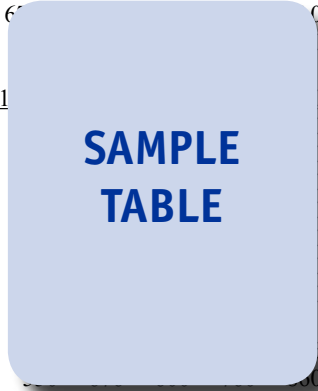


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-2
COUNTERTOP DEMAND BY MATERIAL IN VALUE TERMS
 (million dollars)

Item	2000	2005	2010	2015	2020
Building Construction (bil \$) \$ countertop/000\$ construction	6				0
Countertop Demand	1				
Laminates					
Solid Surface					
Natural Stone					
Engineered Stone					
Tile					
Cast Polymers					
Other					
\$/square foot Countertop Demand (mil sq ft)					



COMPANY PROFILES

Duracite
 2100 Huntington Boulevard
 Fairfield, CA 94533
 707-402-1600
 http://www.duracite.com

Annual Sales:
 Employment:

Key Products: engineered quartz, recycled glass, granite,

SAMPLE PROFILE

Duracite is a manufacturer of residential and commercial surfaces made from solid surface materials, engineered quartz, natural stone, wood and other materials. The privately held company primarily serves the northern and central regions of California and Nevada in the US.

The Company participates in the US countertop industry through the fabrication and installation of countertops, vanity tops and other surfaces for residential bathroom and kitchen, and various commercial end uses. Among the materials used by Duracite to produce countertops are CORIAN acrylic-based solid surface products and ZODIAQ engineered quartz, both of which are sourced from DuPont (Wilmington, Delaware); CAMBRIA engineered quartz that is produced by Cambria (Eden Prairie, Minnesota); and VETRAZZO materials, which are made by Polycor Vetrazzo LLC (Tate, Georgia), a subsidiary of Polycor Incorporated (Canada), and produced using concrete and recycled glass.

Duracite is also a member of Artisan Group, a national organization of independent fabricators. Through this organization, it produces and installs ARTISAN STONE COLLECTION granite, HERITAGE

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“Countertop demand in the Northeast is forecast to rise 2.5 percent per year to 120 million square feet in 2015. Gains will be promoted by the rebound in construction activity from the declines of the 2005-2010 period, which reflected the deep collapse of the housing market that began in 2007. Growth will be driven by the residential building construction market. Demand for countertops in residential applications will benefit as housing completions rebound from their low 2010 levels. Moreover, ...”
 --Section VI, pg. 245

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OTHER STUDIES

Plumbing Fixtures & Fittings

US demand for plumbing products will rise 7.1 percent annually through 2015, driven by a recovery in building construction and a rebound in the size and number of bathrooms per new housing unit. Fixtures will outpace fittings, spurred by rising unit demand for such higher-priced products as hot tubs and spas, whirlpool bathtubs and cast polymer lavatories. This study analyzes the \$7.7 billion US plumbing product industry, with forecasts for 2015 and 2020 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#2798 September 2011 \$5100

Hard Surface Flooring

US demand for hard surface flooring is forecast to rise 7.2 percent annually through 2015. Tile and laminate flooring will see the fastest gains, while vinyl flooring remains the largest segment. The nonresidential building market will outpace the residential building and transportation equipment segments. This study analyzes the 6.5 billion square foot US hard surface flooring industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

Study #: 2789. Published: July 2011 Price: \$4900

Solid Surface Materials & Other Cast Polymers

US demand for cast polymers will increase 5.4 percent 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 percent 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

Decorative Tile

US demand for decorative tile is forecast to increase 4.4 percent 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

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