Solid Surface & Other Cast Polymers

US Industry Study with Forecasts for **2016 & 2021**

Study #2873 | April 2012 | $5100 | 318 pages

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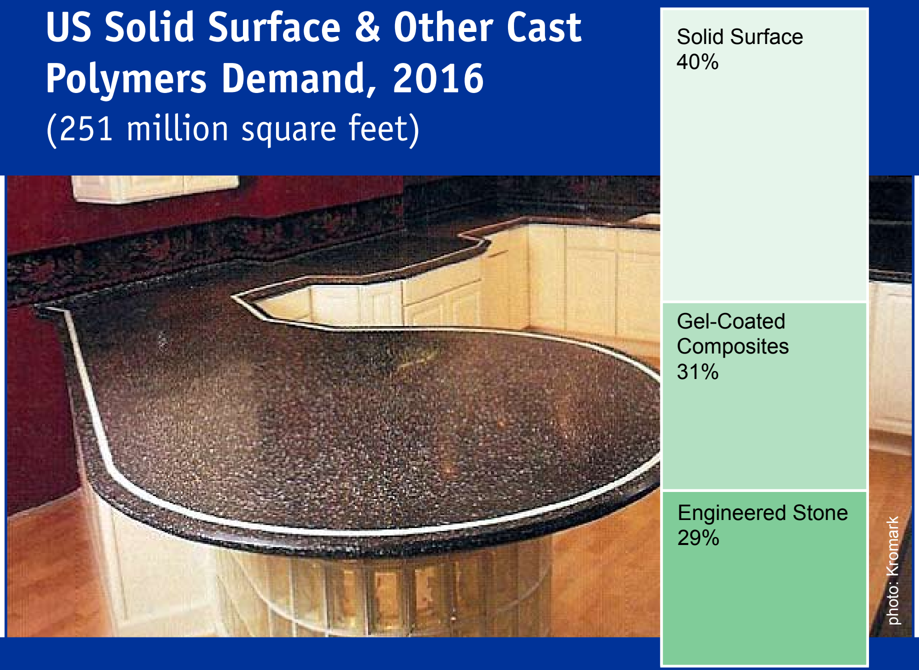
Gains will be driven by performance advantages such as minimal maintenance requirements and resistance to stains, impact, moisture, and other damage caused by wear and tear.

US demand to rise 6.3% annually through 2016

Demand for cast polymers in the US is forecast to increase 6.3 percent per year to 251 million square feet in 2016. In most applications, cast polymers offer performance advantages such as minimal maintenance requirements and resistance to stains, impact, moisture, and other damage caused by wear and tear. Further advances will be restrained by competition from other surfacing options, including granite and laminates.

US Solid Surface & Other Cast Polymers Demand, 2016
(251 million square feet)



Engineered stone to remain fastest growing products

The market for cast polymers underwent a significant transformation over the past decade with engineered stone rising from a niche product to controlling over a quarter of sales. Demand for engineered stone grew rapidly from a small base during the 2001-2006 period due to its significant performance advantages over competitive products. Engineered stone continued to gain market share during the downturn, buoyed by sales to higher-end customers who were less impacted by the weak economy. While growth will continue to be above average, increases in demand will decelerate, tempered by the material's high price, limiting further market penetration.

After declining significantly during the 2006-2011 period due to a weak economy and fierce competition from engineered stone products, solid surface will register healthy gains based on its well established market presence and high degree of durability. Solid surfaces are positioned as a mid level material in terms of pricing and performance.

Demand for gel-coated composites will rebound strongly through 2016 from the significant losses during the previous five years. Gel-coated composites registered the biggest declines during this time due to their heavy use in new construction. Going forward, gel-coated composites will benefit from the recovery in new housing construction, as well as design trends featuring a greater number of and more elaborate bathrooms in homes since gel-coated composites are primarily installed in bathrooms.

Residential improvements and repairs to remain largest application

Following the declines of the 2006-2011 period, gains will be driven by a sharp rebound in housing completions from depressed 2011. The residential improvement and repair segment will continue to account for the majority of cast polymer demand, so an upswing in residential remodeling activity and greater credit availability will also support gains. Sales of cast polymers will be further aided by a recovery in office and commercial, and institutional construction through 2016 -- the two nonresidential segments where cast polymers are most likely to be installed.

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Sample Text, Table & Chart

TABLE V-3

RESIDENTIAL CAST POLYMER COUNTERTOP DEMAND BY MARKET (million square feet)

Item	2001	2006	2011	2016	2021
Residential Countertop Demand					
% cast polymer					
Residential Cast Polymer Countertop					
By Segment:					
New Construction					
Remodeling					
By Room:					
Kitchen					
Bathroom					
Other					
% residential					
Cast Polymer Countertop Demand					

SAMPLE TABLE

PRODUCTS

Supply & Demand

Demand for engineered stone materials is projected to i
percent p … feet in 2016. Unlike ot
polymers … favorable growth throu
2009 rec … affluent individuals to c
invest in … nd materials such as the
Going fo … rojected to achieve the
gains in … materials. Gains in area
will reflec … nterest in engineered qua
common type of engineered stone, due to its performance an
tive qualities. Engineered stone surfaces are durable, nonpo
clean, and do not require regular maintenance such as sealing
burdensome. Engineered quartz is a biologically inert mater
it ideal for both residential and nonresidential applications. Its aesthetic qualities will also promote demand growth. Engineered stone resembles natural stone in appearance, but has a smoother surface and a consistent color and pattern. Like solid surface materials, engineered stone can be used to make the seamless countertop surfaces and integrated sinks popular with homeowners due to the ease of wiping down and cleaning them.

SAMPLE TEXT

Demand gains will be promoted by a rebounding residential construction market. The expected increase in housing completions from the low levels of 2011 will boost demand for engineered stone. In the remodeling market, rising improvement and repair expenditures will spur growth. Kitchen and bathroom renovation projects are among the most common remodeling projects, and consumers frequently replace worn or less fashionable countertops with more attractive materials. … ally, as consumers renovate their kitchens, they often increas … which will create more space for countertops.

Demand for engineered stone in the nonresidential buil… struction market will also increase. Engineered stone can be…

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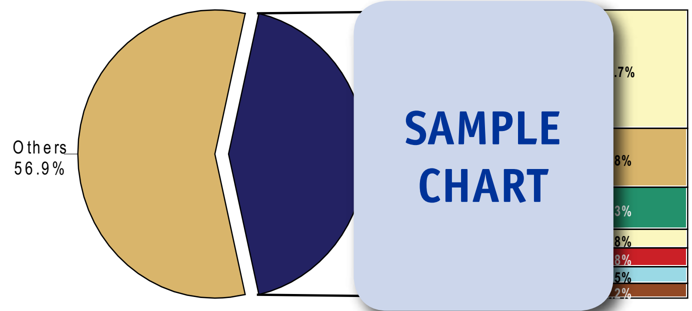
CHART VII-1

US CAST POLYMER SALES BY COMPANY, 2011 ($1.6 billion)



Sample Profile, Table & Forecast

TABLE VI-8

SOUTH CAST POLYMER DEMAND
(million square feet)

Item	1996	2001	2006	2011	2016
South Construction Expend (bil 2005$)					
sq ft cast polymer/mil $ construction					
South Cast Polymer Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Product:					
Countertops					
Other Building Surfaces					
Other					
% South					
Cast Polymer Demand					

SAMPLE TABLE

COMPANY PROFILES

Breton SpA
Via Garibaldi 27
31030 Castello di Godego, Treviso
Italy
39-0423-7691
http://www.br

Annual Sales:
Employment:

Key Technolo ... compound
stone product

SAMPLE PROFILE

Breton develops manufactures and markets equipment to process and produce engineered stone, ceramics, porcelain, and natural stone. The privately held company also licenses its manufacturing technologies worldwide. Breton operates via two divisions: Natural and Compound Stone, and Machine Tool. The Company has a production and development center in Castello di Godego, Treviso, Italy.

The Company is active in the US cast polymer industry via the Natural and Compound Stone division, which licenses Breton's proprietary BRETONSTONE and BRETONTERASTONE engineered stone production processes and BRETONSTONE CEMENT cement-based compound stone production process. These processes are licensed to third-party manufacturers in the US, Europe, the Africa/Mideast region and the Asia/Pacific region.

Breton's BRETONSTONE process combines quartz, marble, granite and other natural stones with polymer- or cement-based resins and pigments to form engineered stone. These materials are mixed and compacted using a vibrocompression vacuum process that removes

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"The South is the largest regional market for cast polymers, representing 40 percent of total demand in 2011. Demand for cast polymers in the region is expected to increase 6.3 percent per year to 100.3 million square feet in 2016. Gains will be spurred by growth in housing completions in the region from the depressed 2011 levels. Moreover, the South is forecast to see the fastest growth in sales of existing homes through 2016, as transplants from the Northeast and Midwest arrive in the region."
--Section VI, pg. 217-8

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Other Studies

World Flooring & Carpets

World flooring and carpet demand will rise 4.9 percent yearly to 18.6 billion square meters in 2016. The Asia/Pacific region will see the most rapid growth. Nonresidential buildings will be the fastest growing market, while nonresilient flooring will pace products. North America will offer the best prospects for carpets and rugs. This study analyzes the 14.6 billion square meter world flooring and carpet industry, with forecasts for 2016 and 2021 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2981 ....January 2013 .... $6300

High Performance Composites

US demand for polymer materials containing advanced fiber reinforcements is forecast to rise almost 15 percent per year to $10.2 billion in 2016. Aerospace will remain the dominant and fastest growing market, followed by the energy market. Carbon will continue as the dominant and most rapidly growing fiber, followed by S-glass. This study analyzes the $5.1 billion US high performance composite industry, with forecasts for 2016 and 2021 by fiber, market and resin. The study evaluates company market share and profiles industry players.

#2905 ....June 2012 .... $4900

Cabinets

US demand for cabinets is forecast to rise 8.2 percent annually to $15.3 billion in 2016, driven by a rebound in housing completions. The dominant kitchen cabinet segment will see the fastest growth. Demand will also be boosted by design trends that call for homes with more and larger cabinets to store food products and cookware. This study analyzes the $10.3 billion US cabinet industry, with forecasts for 2016 and 2021 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#2904 ....June 2012 .... $5100

Decorative Laminates

US demand for decorative laminates is forecast to advance 5.5 percent per year to 12.4 billion square feet in 2015. The cabinet market will remain the largest segment, while flooring will record the most rapid gains. Saturated papers will grow the fastest within the dominant low pressure overlays product segment, followed by decorative foils. This study analyzes the 9.5 billion square foot US decorative laminate industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.

#2849 .... February 2012 .... $4900

Countertops

US demand for countertops is forecast to advance 4.8 percent annually through 2015. Gains in the key residential market will be promoted by a rebound in housing completions and by increasing improvement and repair spending. Furthermore, growing interest in making homes more marketable will benefit higher-value countertop materials. This study analyzes the 600 million square foot US countertop industry, with forecasts for 2015 and 2020 by material and market. The study also evaluates company market share and profiles industry players.

#2788 .... September 2011................ $5100

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