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# Residential Kitchen & Bathroom Countertops in China

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

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Study #2890 | July 2012 | \$5400 | 234 pages

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### INDUSTRY STRUCTURE

1 Countertop Market Share in China  
by Company, 2010..... 170

*Continuing growth in new housing completions and increasing improvement and repair expenditures will drive the market for residential kitchen and bathroom countertops in China.*

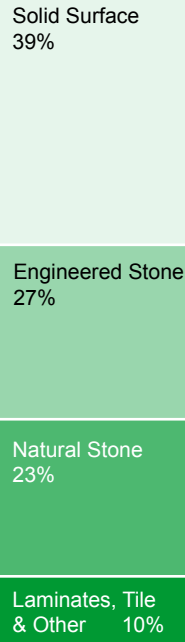
## Demand to increase 6.5% per year through 2015

The market for residential kitchen and bathroom countertops in China is forecast to increase 6.5 percent per year to 82.1 million square meters in 2015. Advances will be driven by continuing growth in new housing completions and rising improvement and repair expenditures. The expanding average floor space of kitchens and bathrooms in new residential structures, a greater penetration of countertops in bathrooms, and rising personal income levels across the country will fuel demand for countertops.

## Bathroom countertops to outpace kitchen types through 2015

Demand for both kitchen and bathroom countertops will benefit from the growing average size of kitchens and bathrooms, as well as the more extensive usage of countertops, especially in rural housing. Although kitchen countertops will remain dominant, sales of bathroom countertops will see more rapid growth through 2015. Gains will be supported by the higher penetration rate of countertops in bathrooms, especially in new construction. Demand in new construction will account for 62 percent of residential countertop demand in volume terms in China in 2015, as new housing completions rise and kitchen and bathroom sizes in new structures continue to grow. However, remodeling demand will see faster growth through 2015. An aging housing stock, plus higher personal income levels, will help to spur remodeling expenditures and associated demand for countertops.

## Residential Kitchen & Bathroom Countertop Demand by Material (82.1 million square meters, 2015)



## Engineered stone to remain fastest growing material

Solid surface countertops account for the largest share of the overall residential countertop market. However, solid surface countertops face competition from engineered stone, which saw its share of the market leap from one percent in 2005 to more than 15 percent in 2010. Engineered stone will continue to see the fastest growth of all materials, with demand increasing 20 percent per year through 2015. Gains will be fueled by engineered stone's natural appearance combined with its durability and reputation as a high-end product. Demand for natural stone will exhibit modest gains through 2015, while tile and laminates will continue to post declines in demand.

The market for other materials, including stainless steel and wood, will be stimulated by increasing consumer interest in specialized countertop surfaces.

## Central-East to remain largest regional market

The Central-East will remain the largest regional market for residential countertops in China through 2015. Gains will be supported by the region's higher penetration rate of countertops in both kitchens and bathrooms, higher disposable income levels, and large population base. Developing regions such as the Northwest, Southwest, and Northeast will post the fastest growth through 2015, due mostly to the previously low penetration rate of countertops in these regions.

**Sample Text,  
 Table & Chart**

**SURFACE MATERIALS**

**Natural Stone**

Demand for natural stone countertops is forecast to increase by 1.5 percent per year -- in volume terms through 2020. Growth will be restrained primarily by the availability of countertop materials, notably solid surface materials, particularly in kitchen applications. Low-end natural stone is available at similar prices to natural stone, and to install and come in a wider variety of colors. Substitution from engineered stone, which offers the look and feel of natural stone with better durability, will also impact demand for high-end natural stone. Demand will also be affected by concerns in China over the radiation that some investigators contend is given off by natural stone. This issue first surfaced in China in the late 1990s. Since then, a number of reports concerning the radioactivity of natural stone used in residential construction have surfaced. It is reported that natural stone contains a minimal amount of natural radionuclide, which can be a source of radiation exposure. Thus, the radioactivity issue has negatively impacted demand for natural stone countertops in Chinese homes. In addition, quality concerns about natural stone manufactured in China is a factor, as natural stone countertops manufactured in China are of much lower quality than those manufactured in Western Europe or the US due to poorer quality stone and outdated technology.

Advances in natural stone countertop demand will be stimulated by its low average prices, which is a primary concern of low-income consumers. Consumers in rural areas also tend to use natural stone rather than tile if financially feasible, as natural stone countertops are perceived as a superior product. Due to increasing personal income levels, the relatively narrow difference in price between natural stone and tile, natural stone is often a substitute for tile for low-income families. In addition, natural stone will remain an important material for countertops in urban areas, benefiting from its natural appearance.

**TABLE V-4**

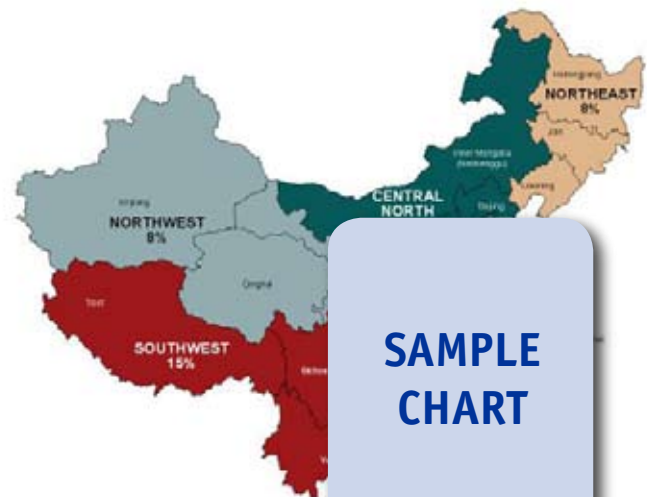
**NEW MULTIPLE FAMILY HOUSING COUNTERTOP  
 DEMAND IN CHINA  
 (000 square meters)**

Item	2000	2005	2010	2015	2020
New Multiple Family Units (000 units)- sq m floor space/unit	100	150	200	250	300
New Multi Family Floor Space (mil sq % countertops	100	150	200	250	300
New Multi Family Countertop Demand Kitchen Bathroom	20	30	40	50	60
% multiple family New Countertop Demand	23	20	20	20	20

**SAMPLE  
 TABLE**

**CHART VI-1**

**COUNTERTOP DEMAND IN CHINA BY REGION, 2010  
 (59.9 million square meters)**



**SAMPLE  
 CHART**

**Sample Profile,  
 Table & Forecast**

**TABLE IV-6  
 BATHROOM COUNTERTOP DEMAND  
 IN NEW HOUSING IN CHINA  
 (000 square meters)**

Item	2000	2005	2010	2015	2020
New Housing Units (000 units)	11	11	11	11	11
sq m countertops/housing unit					
New Housing Floor Space (mil sq m)					
% new bathroom countertops					
New Bathroom Countertop Demand					
Solid Surface					
Natural Stone					
Tile					
Engineered Stone					
Laminates					
Other					
% new Bathroom Countertop Demand					



**COMPANY PROFILES**

**Bitto Industry Dongguan Company Limited**  
 Nange Industrial Area, Daojiao Town  
 Dongguan, Guangdong 523187  
 China  
 86-769-8116-2  
 http://www.bitto.com

Annual Sales: \$100 million (company, 1/12)  
 Employment: 1,000 employees  
 Key Products: Solid surface materials

**SAMPLE PROFILE**

Bitto Industry Dongguan is a manufacturer of solid surface and engineered quartz materials. The Company is a subsidiary of Italian Bitto Shareholding Company Limited.

The Company is involved in the Chinese countertop industry through the production of solid surface and engineered quartz materials that can be utilized in the fabrication of countertops and other items. Solid surface materials, which are available in thicknesses ranging from 6 to 30 millimeters (mm), are marketed under the BITTO and WINASKY brand names. Bitto Industry Dongguan's BITTO solid surface materials include 100-percent acrylic types that resist stains, flames and bacteria. The Company manufactures WINASKY materials in modified acrylic, 100-percent acrylic and polyester varieties. For example, WINASKY modified acrylic materials, which are engineered to resist cracking, is made from polymethyl methacrylate modified resins and mineral fillers. Bitto Industry Dongguan's engineered quartz materials are sold under the BITTO tradename in thicknesses of 15, 20 or 30 millimeters. BITTO engineered quartz materials are manufactured from 93-percent natural quartz, six-percent resins and one-percent pigments.

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"Demand for bathroom countertops in new housing construction is forecast to grow 7.0 percent per annum through 2015, reaching eight million square meters. Advances will be bolstered by strong growth in new housing construction, and the trend toward including more than one bathroom per housing unit in new urban developments. Additionally, demand for a more functional bathroom will also promote the installation of countertops which incorporate sinks. However, ..."  
 --Section IV, pg. 103



**OTHER STUDIES**

**World Solid Surface & Other Cast Polymers**

Global demand for cast polymers will grow 7.9 percent annually to 252 million square meters in 2016. Most projected growth will be attributable to China, a country with an emerging domestic cast polymer industry and large construction sector. Engineered stone will grow the fastest while solid surface materials remain dominant. This study analyzes the 172 million square meter world cast polymer industry, with forecasts for 2016 and 2021 by product, application, world region and for 18 countries. The study also evaluates company market share and profiles industry players.

#2901 ..... July 2012 ..... \$6100

**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

**Construction Outlook in China**

Construction expenditures in China will increase 8.8 percent per annum in real terms to 16.4 trillion yuan in 2016. Nonbuilding construction will be the fastest growing segment, benefiting from transportation infrastructure expansion and upgrades, and from the construction of utilities. Growth in residential and nonresidential building construction will also be strong. This study analyzes the 10.8 trillion yuan construction industry in China, with forecasts for 2016 and 2021 by type, market and region. The study also evaluates company market share and profiles industry participants.

#2898 ..... June 2012 ..... \$5500

**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

**About The Freedonia Group**

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