INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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Table of Contents **2**

List of Tables & Charts **3**

Study Overview **4**

Sample Text, Table & Chart **5**

Sample Profile, Table & Forecast **6**

Order Form & Corporate Use License **7**

About Freedonia, Custom Research, Related Studies, **8**

World Solid Surface & Other Cast Polymers

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

Study #2901 | July 2012 | $6100 | 387 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General 4
World Economic Overview 5
  Recent Historical Trends 6
  World Economic Outlook 7
World Gross Fixed Investment Outlook 11
World Consumer Spending 14
World Demographic Outlook 15
  Population 16
  Households 17
  Urbanization Patterns 18
World Building Construction Outlook 20
  Residential Building 22
    New Housing Units 24
    Housing Stock 27
  Nonresidential Building 28
Environmental & Regulatory Issues 30

OVERVIEW

General 34
Regions 37
Types 39
  Solid Surface Materials 43
  Engineered Stone 49
  Gel-Coated Composites 57
Applications 62
  Residential Countertops 65
  Nonresidential Countertops 69
  Sinks 72
  Other Building Applications 75
  All Other 78
Production & Trade 81

NORTH AMERICA

General 83
Demand by Type & Application 85
United States 88
Canada 97
Mexico 106

WESTERN EUROPE

General 115
Demand by Type & Application 118
France 122
Germany 130
Italy 138
Netherlands 147
Spain 154
United Kingdom 162
Other Western Europe 169

ASIA/PACIFIC

General 177
Demand by Type & Application 180
Australia 185
China 193
India 205
Japan 213
South Korea 221
Thailand 227
Other Asia/Pacific 234

OTHER REGIONS

Central & South America 243
  General 243
  Demand by Type & Application 246
  Brazil 248
  Other Central & South America 255
Eastern Europe 261
  General 261
  Demand by Type & Application 263
  Russia 265
  Other Eastern Europe 273
Africa/Mideast 278
  General 278
  Demand by Type & Application 281
  Turkey 284
  Other Africa/Mideast 290

INDUSTRY STRUCTURE

General 299
Industry Structure 301
Market Share 305
Competitive Strategies 308
Research & Development 310
Marketing & Distribution 312
Mergers & Acquisitions 314
Cooperative Agreements 315

COMPANY PROFILES

AKG Yalitim ve Insaat Malzemeleri
  Sanayi ve Ticaret 320
Aristech Acrylics 321
BLANCO GmbH 324
Breton SpA 325
Caesarstone Sdot-Yam 328
Cambria 330
Cheil Industries 332
Cosentino SA 335
Diresco NV 338
DuPont (EI) de Nemours 339
Durat 341
Falat Sang Asia 342
Fama Industries 343
Fletcher Building 344
Guangdong Huaxun Industry 347
Guangdong Oppein Home Group 349
Gulf Stone 350
Hanwha Group 351
Keda Industrial 353
Kuraray Company 355
LG Hausys 356
Marblo Holdings 358
Marmol Compac 359
Opal Industrial 361
Peker Group 362
Pokarna Limited 363
Quarella SpA 365
Quartzforms SpA 366
Romastone Company 367
Rover SpA 368
Sanitec Corporation 369
Santa Margherita 371
Stone Italiana 372
Technistone AS 374
Tower Industries 375
Vietnam Construction and Import-Export 377
Vietnam Quartz Stones 378
Westag & Getalit 380
WK Marble & Granite 381
Additional Company List 383

World Solid Surface & Other Cast Polymers

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

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List of Tables

EXECUTIVE SUMMARY

1 Summary Table 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region 11
2 World Gross Fixed Investment by Region 13
3 World Personal Consumption Expenditures by Region 15
4 World Population by Region 17
5 World Households by Region 18
6 World Urban Population by Region 20
7 World Building Construction Expenditures by Region 22
8 World Residential Building Construction Expenditures by Region 24
9 World New Housing Units by Region .. 26
10 World Housing Stock by Region 28
11 World Nonresidential Building Construction Expenditures by Region 30

OVERVIEW

1 World Cast Polymer Demand 36
2 World Cast Polymer Demand by Region 38
3 World Cast Polymer Demand by Type 42
4 World Solid Surface Material Demand by Region 48
5 World Engineered Stone Demand by Region 52
6 World Gel-Coated Composite Demand by Region 61
7 World Cast Polymer Demand by Application 64
8 World Cast Polymer Demand in Residential Countertops by Region. 68
9 World Cast Polymer Demand in Nonresidential Countertops by Region 71
10 World Cast Polymer Demand in Sinks by Region 74
11 World Cast Polymer Demand in Other Building Applications by Region 77
12 World Cast Polymer Demand in All Other Applications by Region 80

NORTH AMERICA

1 North America: Market Environment for Cast Polymers 85
2 North America: Cast Polymer Demand by Type & Application.................. 87
3 United States: Market Environment for Cast Polymers 91
4 United States: Cast Polymer Demand by Type 94
5 United States: Cast Polymer Demand by Application 97
6 Canada: Market Environment for Cast Polymers 100
7 Canada: Cast Polymer Demand by Type 103
8 Canada: Cast Polymer Demand by Application......................... 106
9 Mexico: Market Environment for Cast Polymers 109
10 Mexico: Cast Polymer Demand by Type 111
11 Mexico: Cast Polymer Demand by Application 114

WESTERN EUROPE

1 Western Europe: Market Environment for Cast Polymers 118
2 Western Europe: Cast Polymer Demand by Type & Application 121
3 France: Market Environment for Cast Polymers 125
4 France: Cast Polymer Demand by Type 127
5 France: Cast Polymer Demand by Application 130
6 Germany: Market Environment for Cast Polymers 133
7 Germany: Cast Polymer Demand by Type 135
8 Germany: Cast Polymer Demand by Application 138
9 Italy: Market Environment for Cast Polymers 141
10 Italy: Cast Polymer Demand by Type 144
11 Italy: Cast Polymer Demand by Application 147
12 Netherlands: Market Environment for Cast Polymers 150
13 Netherlands: Cast Polymer Demand by Type 152
14 Netherlands: Cast Polymer Demand by Application 154
15 Spain: Market Environment for Cast Polymers 157
16 Spain: Cast Polymer Demand by Type 159
17 Spain: Cast Polymer Demand by Application 161
18 United Kingdom: Market Environment for Cast Polymers 164
19 United Kingdom: Cast Polymer Demand by Type 166
20 United Kingdom: Cast Polymer Demand by Application 169
21 Other Western Europe: Market Environment for Cast Polymers 172
22 Other Western Europe: Cast Polymer Demand by Type 174
23 Other Western Europe: Cast Polymer Demand by Application 176

ASIA/PACIFIC

1 Asia/Pacific: Market Environment for Cast Polymers 180
2 Asia/Pacific: Cast Polymer Demand by Type & Application............... 184
3 Australia: Market Environment for Cast Polymers 187
4 Australia: Cast Polymer Demand by Type 190
5 Australia: Cast Polymer Demand by Application 193
6 China: Market Environment for Cast Polymers 197
7 China: Cast Polymer Demand by Type 202

(continued on following page)

World Solid Surface & Other Cast Polymers

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

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List of Tables

(continued from previous page)

12 Japan: Market Environment for Cast Polymers 216
13 Japan: Cast Polymer Demand by Type 218
14 Japan: Cast Polymer Demand by Application 220
15 South Korea: Market Environment for Cast Polymers 223
16 South Korea: Cast Polymer Demand by Type 225
17 South Korea: Cast Polymer Demand by Application 227
18 Thailand: Market Environment for Cast Polymers 230
19 Thailand: Cast Polymer Demand by Type 232
20 Thailand: Cast Polymer Demand by Application 234
21 Other Asia/Pacific: Market Environment for Cast Polymers 237
22 Other Asia/Pacific: Cast Polymer Demand by Type 240
23 Other Asia/Pacific: Cast Polymer Demand by Application 242

OTHER REGIONS

1 Central & South America: Market Environment for Cast Polymers 245
2 Central & South America: Cast Polymer Demand by Type & Application 247
3 Brazil: Market Environment for Cast Polymers 250
4 Brazil: Cast Polymer Demand by Type 253
5 Brazil: Cast Polymer Demand by Application 255
6 Other Central & South America: Market Environment for Cast Polymers 257
7 Other Central & South America: Cast Polymer Demand by Type 259
8 Other Central & South America: Cast Polymer Demand by Application .. 260
9 Eastern Europe: Market Environment for Cast Polymers 263
10 Eastern Europe: Cast Polymer Demand by Type & Application 265
11 Russia: Market Environment for Cast Polymers 268
12 Russia: Cast Polymer Demand by Type 270
13 Russia: Cast Polymer Demand by Application 272
14 Other Eastern Europe: Market Environment for Cast Polymers 275
15 Other Eastern Europe: Cast Polymer Demand by Type 276
16 Other Eastern Europe: Cast Polymer Demand by Application 278
17 Africa/Mideast: Market Environment for Cast Polymers 281
18 Africa/Mideast: Cast Polymer Demand by Type & Application 283
19 Turkey: Market Environment for Cast Polymers 286
20 Turkey: Cast Polymer Demand by Type 288
21 Turkey: Cast Polymer Demand by Application 290
22 Other Africa/Mideast: Market Environment for Cast Polymers 293
23 Other Africa/Mideast: Cast Polymer Demand by Type 296
24 Other Africa/Mideast: Cast Polymer Demand by Application 298

INDUSTRY STRUCTURE

1 World Cast Polymer Sales by Company, 2011..................... 304
2 Selected Cooperative Agreements ... 316

List of Charts

OVERVIEW

1 World Cast Polymer Demand by Region, 2011 39
2 World Cast Polymer Demand by Type, 2011 42
3 World Solid Surface Material Demand by Region, 2011 49
4 World Engineered Stone Demand by Region, 2011 53
5 World Gel-Coated Composite Demand by Region, 2011 62
6 World Cast Polymer Demand by Application, 2011 65
7 World Cast Polymer Demand in Residential Countertops by Region, 2011 69
8 World Cast Polymer Demand in Nonresidential Countertops by Region, 2011 72
9 World Cast Polymer Demand in Sinks by Region, 2011 75
10 World Cast Polymer Demand in Other Building Applications by Region, 2011 78
11 World Cast Polymer Demand in All Other Applications by Region, 2011 81

NORTH AMERICA

1 North America: Cast Polymer Demand by Country, 2011............. 88

WESTERN EUROPE

1 Western Europe: Cast Polymer Demand by Country, 2011........... 122

ASIA/PACIFIC

1 Asia Pacific: Cast Polymer Demand by Country, 2011........... 185

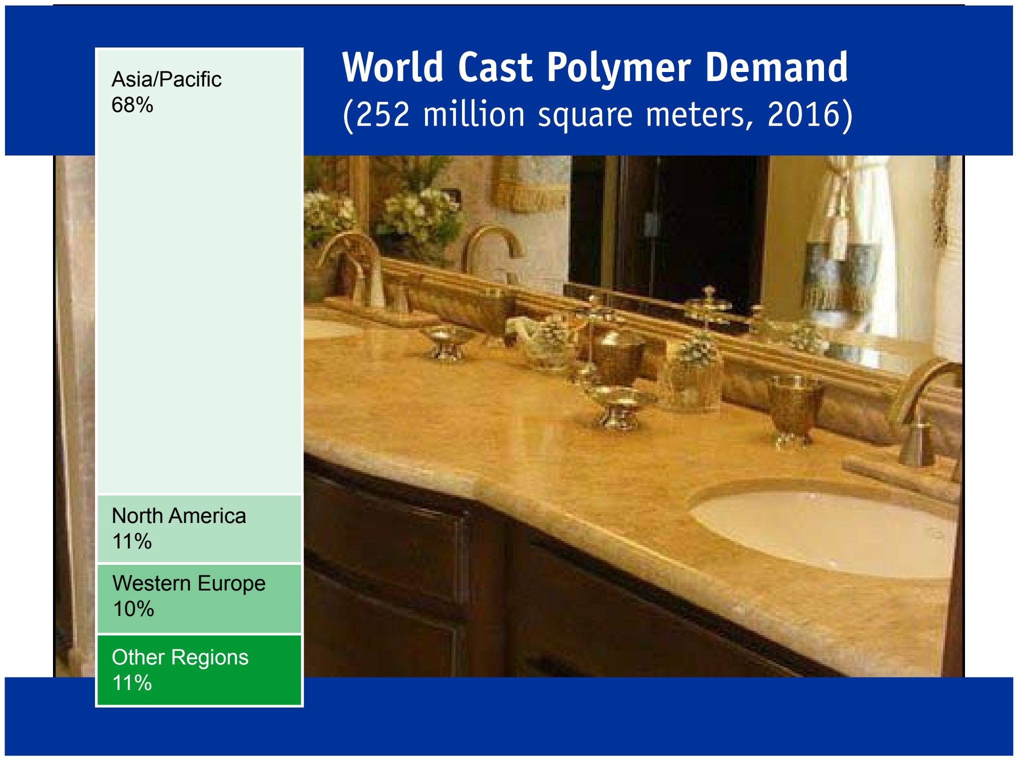
INDUSTRY STRUCTURE

1 World Cast Polymer Market Share by Company, 2011..................... 306

Further dominance in the Asia/Pacific region (primarily in China), as well as a recovery in new housing in developed regions and the rapid growth of engineered stone, will spur world gains.

Demand to rise nearly 8% annually through 2016

Global demand for cast polymers is forecast to rise 7.9 percent annually to 252 million square meters in 2016. Nearly 60 percent of projected growth will be attributable to China, a country with a quickly developing domestic cast polymer industry and a considerable construction sector. Growing populations and ongoing economic advances in China and other developing countries such as India will continue to create the need for large numbers of modern housing units and nonresidential facilities, providing opportunities for surface materials such as cast polymers. Market gains will also be aided by a recovery of new housing construction in the US and other developed countries from low 2011 bases. Cast polymers are used to make countertops and sinks, as well as other building and nonbuilding applications.



World Cast Polymer Demand
(252 million square meters, 2016)

Engineered stone to post fastest cast polymer gains

Solid surface accounted for 59 percent of global sales in 2011. Over 70 percent of solid surface materials were sold in the Asia/Pacific region, where they are generally low-cost options. In most of the region, solid surfaces are popular despite being offered in limited colors. Less expensive, but less durable gel-coated composites, including cultured marble, cultured onyx, and cultured granite, are expected to exhibit more modest gains through 2016. Engineered stone (e.g., engineered quartz and engineered marble) accounted for the second largest share -- 25 percent -- of the cast polymer market in 2011, up from 16 percent in 2006, when it comprised the smallest share. Intense marketing strategies (such as in Australia) highlighting engineered stone's advantages over natural stone and China's rapidly increasing output of relatively low-cost versions have promoted its use. Engineered stone is expected to achieve the fastest gains of all cast polymers through 2016.

Asia/Pacific region to dominate consumption

The largest regional market for cast polymers in 2011 was the Asia/Pacific region, with 63 percent of the global total. Four of the top five cast polymer consuming countries -- China, India, Japan, and South Korea -- are located in the region. Gains in this region will be mainly driven by China, which will account for nearly 70 percent of the region's cast polymer sales in 2016. China's cast polymer industry continues to rapidly develop, including a greater number of companies developing their own versions of engineered stone that sell at a discount over the imported Breton-based versions. Opportunities will increase as consumers and builders have greater access to relatively affordable cast polymers. India is also expected to post strong gains as it continues to develop its housing and nonresidential sectors.

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Sample Text, Table & Chart

TABLE VI-6

**CHINA:
MARKET ENVIRONMENT FOR CAST POLYMERS**

Item	2001	2006	2011	2016	2021
Resident Population (million)					
GDP/capita					
Gross Domestic Product (bil 2010$)					
persons/household					
Households (million)					
Personal Consumption Expend (bil 201					
Building Construction Expend (bil 2010					
Residential Building					
Nonresidential Building					
New Housing Units (000)					
square meter/new unit					
New House Floor Space (mil sq meters)					
Housing Stock (mil units)					
square meter/stock unit					
Existing Resident Floor Space (bil sq m					
sq m cast polymer/mil $ construction					
Cast Polymer Demand (mil sq meters)					

SAMPLE TABLE

China: Demand by Type

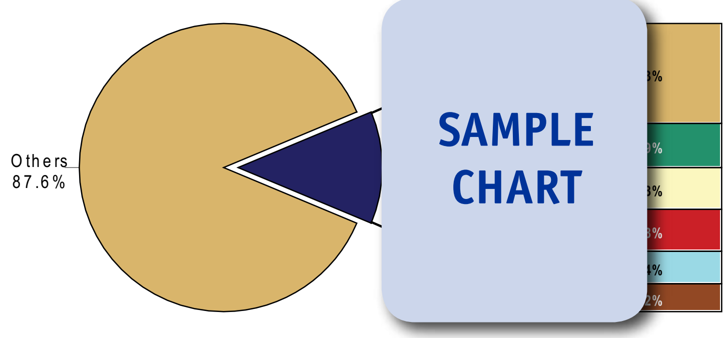
Demand for cast polymers in China is expected to expan ... million square mete ... narket for cast poly ... gains through 2016 ... China are projected ... uction gains. Addit ... ngineered stone, con etrate the country's surfacing market. An expanding middle allow more individuals the monetary resources necessary to p surfaces and products made from these relatively high-value als. In addition, the continued development of the domestic terms of production capacity will provide opportunities as th produced materials tend to be sold at a lower price point than grades. Nevertheless, gains will decelerate from the pace set 2001 to 2011 period, primarily due to a slight slowdown in e development which will impact building construction spendi determinant in cast polymer demand. Cast polymers are wid larger construction projects where mass-produced surface pr economically efficient and in urban areas where cast polyme are readily accessible.

SAMPLE TEXT

In 2011, solid surface accounted for 68 percent of demand, the largest share of the country's total cast polymer sales. In fact, the country was the largest national market for solid surface, accounting for 47 percent of worldwide demand in 2011. Unlike in many othe the world, solid surface is not considered a high-value mater partially due to the presence of a large number of local suppl of which offer limited color options to keep prices down. Th color options combined with a highly competitive market en make the material relatively affordable.

CHART VIII-1

**WORLD CAST POLYMER MARKET SHARE BY COMPANY
(172.0 million square meters, 2011)**



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World Solid Surface & Other Cast Polymers

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Sample Profile, Table & Forecast

TABLE VI-7

CHINA: CAST POLYMER DEMAND BY TYPE (million square meters)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)					
sq m cast polymer/mil $ GDP					
China Cast Polymer Demand					
Solid Surface					
Engineered Stone					
Gel-Coated Composites					
% China					
Asia/Pacific Cast Polymer Demand					

SAMPLE TABLE

COMPANY PROFILES

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

SAMPLE PROFILE

Annual Sales:
Employment:

Key Technolo ... compound
stone product.

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

The Company participates in the world cast polymer industry
the Natural and Compound Stone division, which licenses Breton'
proprietary BRETONSTONE and BRETONTERASTONE engine
stone production processes and BRETONSTONE CEMENT ce-
ment based compound stone production process. These processes
licensed to third-party manufacturers in Europe, the Africa/Midea
region, the Asia/Pacific region, and North America.

Breton's BRETONSTONE process combines quartz, granite,
marble, 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

325

TABLE VI-8

CHINA: CAST POLYMER DEMAND BY APPLICATION (million square meters)

Item	2001	2006	2011	2016	2021
Bldg Construction Expend (bil 2010$):					
sq m cast polymer/mil $ construction					
China Cast Polymer Demand					
Residential Countertops					
Nonresidential Countertops					
Sinks					
Other Building Applications					
All Other Applications					

SAMPLE TABLE

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Other Studies

Molding & Trim

US demand for molding and trim is forecast to rise nearly 11 percent per year to $9.0 billion in 2016, driven by a sharp rebound in housing and building construction. Stairwork will be the fastest growing product, while engineered wood the fastest growing material. The dominant residential market will vastly outpace growth in the nonresidential sector. This study analyzes the $5.4 billion US molding and trim industry, with forecasts for 2016 and 2021 by material, product and market. The study also evaluates company market share and profiles industry players.

#2976...............December 2012..............$5100

Residential Kitchen & Bath Countertops in China

The market for residential kitchen and bathroom countertops in China is expected to grow 6.5 percent per year to 82.1 million square meters in 2015. Solid surface will remain the largest material segment while engineered stone will grow the fastest, increasing 20 percent per year. This study analyzes the 60 million square meter residential kitchen and bath countertop industry in China, with forecasts for 2015 and 2020 by surface material, application, market and region. The study also evaluates company market share and profiles industry participants.

#2890.................. July 2012.................... $5400

Solid Surface & Other Cast Polymers

US cast polymer demand will grow 6.3 percent yearly to 251 million square feet in 2016, driven by a sharp rebound in housing completions from low 2011 levels. Engineered stone will remain the fastest growing type while solid surface will remain the largest segment. Countertops will continue as the dominant application. This study analyzes the 184.5 million square foot US cast polymer industry, with forecasts for 2016 and 2021 by material, product, application and US region. The study also evaluates company market share and profiles industry players.

#2873..................April 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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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