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Cabinets

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

Study #2904 | June 2012 | \$5100 | 374 pages

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Although housing completions will remain below the level reached at their cyclical peak in 2006, the expected recovery will fuel gains in the residential market for cabinets through 2016.

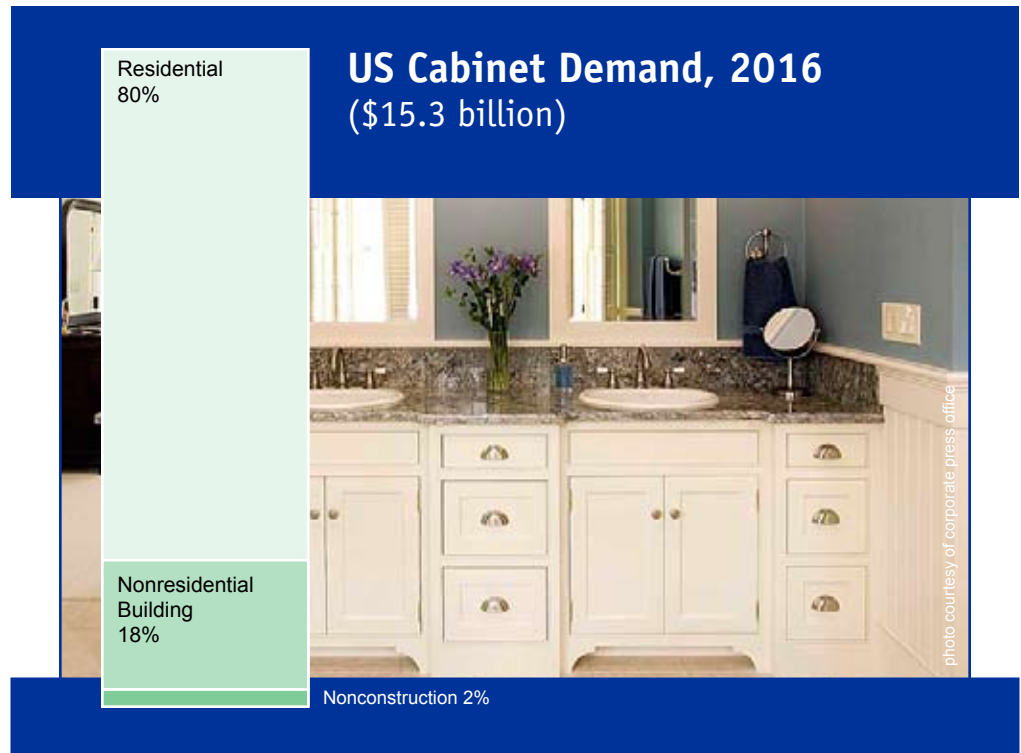
US demand to rise 8.2% annually through 2016

US demand for cabinets is forecast to rise 8.2 percent annually to \$15.3 billion in 2016. Growth will be driven by a rebound in housing completions from a depressed 2011 base. Although housing completions will remain below the level reached at their cyclical peak in 2006, the expected recovery will fuel gains in the residential market.

Residential market has best growth prospects

The residential market accounts for the largest share of cabinet demand, so the turnaround in residential building construction spending will drive gains. The new housing segment will see the most rapid advances, although growth will also be supported by the improvement and repair market. Kitchen and bathroom renovations are a popular home improvement project, as homeowners will renovate these rooms to modernize them and improve their appearance. Cabinet replacement is often a part of these projects. Also, homeowners who were unable to engage in renovation projects during the 2007-2009 recession will undertake these projects as economic conditions improve.

Among cabinet types, 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. Growing demand for cabinets with value-added amenities, such as pull-out drawers and shelves, wine racks, and other features that improve kitchen convenience, will also boost gains.

Demand for bathroom cabinets is forecast to grow 6.5 percent per year to \$1.8 billion in 2016. Design trends that call for homes with multiple bathrooms will support demand, as these rooms frequently include medicine chests or vanities. Demand for other cabinets, such as those found in home theaters, laundry rooms, home offices, and other areas, is expected to reach \$950 million. Homeowners will opt for cabinets that provide secure and attractive storage

options compared to open shelving and free-standing furnishings.

Through 2016, demand for cabinets in the nonresidential market is anticipated to advance 6.5 percent annually to \$2.8 billion, driven by a rebound in construction spending. The office and commercial market will spur growth, as construction of retail sites will promote store display cabinet demand. Rising lodging, healthcare, and educational construction spending will also support demand for cabinets, as these structures incorporate cabinetry to provide secure storage space. In the nonconstruction market, cabinet demand will be boosted by rebounding shipments of recreational boats and recreational vehicles.

Sample Text, Table & Chart

PRODUCTS

Entertainment Center Cabinets -- Demand for entertainment center cabinets is expected to grow at a steady rate of 1.5 percent per year to \$1.2 billion in 2016. Consumer interest in home entertainment systems and large-screen televisions has driven demand for entertainment center cabinets. Homeowners increasingly seek to integrate their entertainment systems into their home decor. Entertainment center cabinets are designed to house a variety of components of a system, including televisions, DVD players, music players, and video game consoles. In addition, these cabinets often include features such as pull-out shelves and drawers to make it easier to access the contents of the cabinet. For instance, the 2010 Wellborn Cabinet introduced the MEDIA LIFE line of entertainment center cabinets designed to house technology equipment. MEDIA LIFE cabinets feature removable backs to facilitate access to wiring, brackets for televisions, and USB ports. These cabinets are offered in a variety of sizes and configurations, including smaller-sized models that can be installed in kitchens and larger-sized types for use in family rooms and entertainment centers.

Demand will also be supported by the nonresidential market. Interest in multimedia presentations and telecommuting will encourage business owners to invest in projectors, screens, and other devices. Some consumers may use cabinets to store these components as a more attractive alternative to other storage solutions.

Entertainment center cabinets will continue to face heavy competition from other storage options going forward. Open shelving systems, and free-standing furniture are all used to provide storage for entertainment equipment. These items are often less expensive than cabinetry and are easier to install. Furnishings and RTA systems can also be transported to a new residence or office if the homeowner or business relocates. Dedicated entertainment center cabinets also compete with kitchen cabinets adapted for use in entertainment centers.

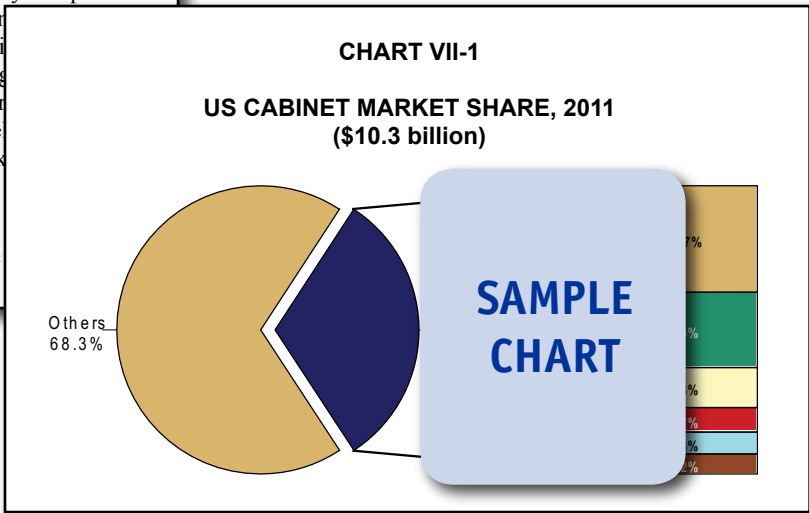
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TABLE V-3
RESIDENTIAL CABINET DEMAND
BY PRODUCT & APPLICATION
(million dollars)

Item	2001	2006	2011	2016	2021
Residential Building Construction (billions of \$ cabinets/000\$ residential construction)					
Residential Cabinet Demand					
By Product:					
Kitchen					
Bathroom					
Other					
By Application:					
New					
Improvements & Repairs					
% residential Cabinet Demand					

**SAMPLE
TABLE**

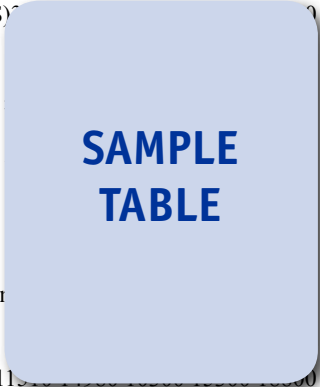


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-8
SOUTH CABINET DEMAND BY SUBREGION & MARKET
 (million dollars)

Item	2001	2006	2011	2016	2021
South Construction Expenditures (bil \$) \$ cabinets/000\$ construction					
South Cabinet Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Market:					
Residential					
Nonresident Bldg/Nonconstruction					
% South Cabinet Demand	11				



COMPANY PROFILES

Cardell Kitchen & Bath Cabinetry
 3215 North Pan Am Expressway
 San Antonio, TX 78219
 210-225-0290
 http://www.ca

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Cardell is a manufacturer of cabinets for various... held company, which also operates as BJ Tidell Industries Incorporated, is a portfolio company of HIG Capital LLC. Cardell has manufacturing facilities in El Campo and San Antonio, Texas, with over 900,000 square feet of manufacturing space.

The Company sells cabinets for use in the kitchen, bath, home office, study, media room, and laundry room primarily through the SPECTRUM 360 and ODYSSEY lines. Cardell cabinets have construction features such as 5/8-inch-thick solid hardwood dovetail drawer boxes; six-way, fully adjustable concealed hinges with BLUMOTION soft close; full-extension under-mount soft-close drawer glides; and built-in half shelves, or optional full shelves. The ODYSSEY line offers all-plywood construction, while the SPECTRUM 360 line has laminate substrate or optional plywood end panels. Cardell's cabinet doors are offered in various styles in standard overlay, semi-full overlay, and full overlay, with panel choices of flat, recessed, raised and knotty raised, thermofoil, veneer face, and quarter sawn. Door styles by the Company include WYNDHAM ARCH, NANTUCKET II, SPINEL, DEVONSHIRE II, and ARISTO. Cardell also offers a range of glazes,

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"In 2011, the South was the largest regional market for cabinets, with 39 percent of demand. Through 2016, demand for cabinets in the region is forecast to advance 8.9 percent annually to \$6.1 billion. This above-average rate of growth will be driven by the residential market, as housing completions in the South rise from their low 2011 base. Furthermore, the South is forecast to see the fastest growth in existing home sales and housing stock through 2016."
 --Section VI, pg. 220

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

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

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

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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