INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Countertops

US Industry Study with Forecasts for **2017 & 2022**

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Countertop demand will be spurred by a recovery in US building construction, gains in single-family housing completions, and relaxed credit requirements for financing remodeling plans.

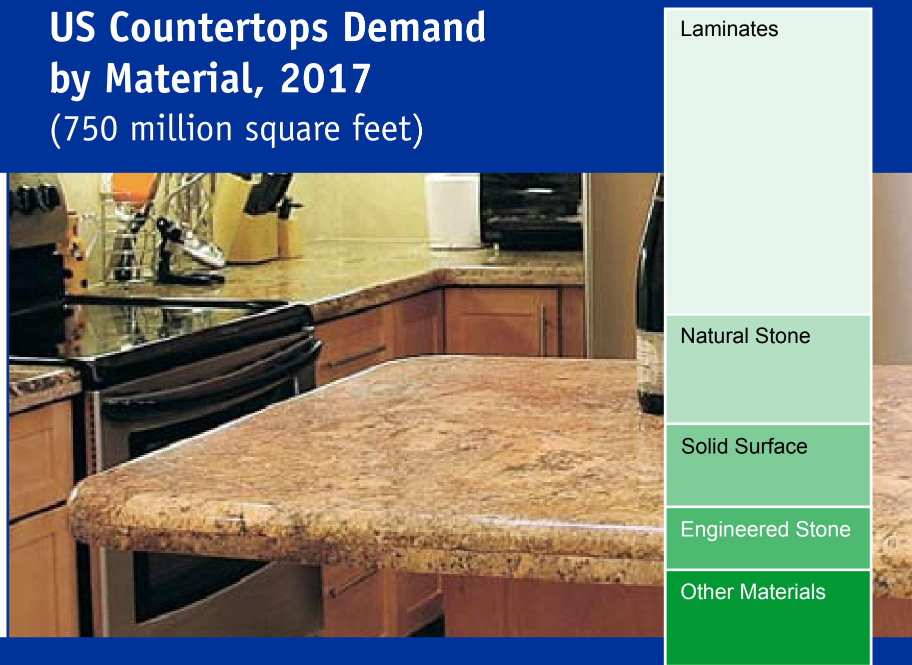
US demand poised for significant rebound

US demand for countertops is forecast to increase 5.1 percent per year to 750 million square feet in 2017, representing a brisk turnaround from the declines of the 2007-2012 period. Going forward, countertop demand will be spurred by a recovery in US building construction and, in particular, gains in single-family housing completions. Advances will also stem from a relaxation in credit requirements, providing homeowners with needed financing to go forward with countertop remodeling plans.

The residential market is critical to the countertop industry and typically accounts for nearly four-fifths of total countertop demand. Accordingly, rough times for the residential construction market over the last few years did not bode well for countertop demand. Tougher financing standards imposed by banks over the 2007-2012 period also restricted remodeling activity and reduced existing home sales. As a result, countertop demand actually declined over the five year timeframe. Coming off of this low 2012 base, however, countertop demand is poised for a rebound.

Through 2017, demand for countertops in the smaller nonresidential market will outpace the dominant residential segment. Nonresidential countertop demand will find more rapid growth in new applications as new nonresidential building construction expenditures rebound following the weak 2007-2012 performance. Countertop sales will be promoted by the construction and renovation of offices, retail shops, hotels, restaurants, health care facilities, schools, and other facilities. Over two-thirds of demand in the nonresidential market is from the institutional, office, and commercial segments.

US Countertops Demand by Material, 2017
(750 million square feet)



Higher end materials to benefit as granite goes mainstream

Laminates are the countertop material of choice due to their favorable performance characteristics at reasonable price points, and just a decade ago laminates accounted for over half of countertop surface area. While laminates will maintain their leading position, their share will continue to slide as they face rising competition from a wider variety of surfaces. Higher quality materials such as natural stone were until recently used mostly in luxury homes. However, a drop in granite prices has extended the availability of this material to a larger portion of the mass market. This suggests that high-end homes, as well as businesses, are moving on to the “next big thing.” As such, engineered stone, natural stone other than granite, high-end tile, stainless steel and other metals, concrete, and recycled materials will benefit as high-end homeowners and business owners seek novel, higher-value materials to distinguish their countertops from the mass market.

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Sample Text, Table & Chart

TABLE IV-1

COUNTERTOP DEMAND BY PRODUCT

Item	2002	2007	2012	2017	2022
Building Construction Expends (bil $)					
$ countertop/000$ construction					
Countertop Demand (mil $)					
Kitchen					
Bathroom					
Other Areas					
$/square foot					
Countertop Demand (mil sq ft)					
Kitchen					
Bathroom					
Other Areas					

SAMPLE TABLE

MARKETS

Nonresidential Building Construction

Nonresidential building construction markets for counte include the construction and maintenance of institutions (e.g. and health care facilities), office and commercial buildings (i ing lodging facilities), industrial buildings (including ancillar and warehouses), and other buildings (e.g., recreational build transportation terminals). In general, nonresidential countert focus more on durability, price, and maintenance requiremen aesthetics, resulting in a higher concentration of laminate cou than in residential markets. The decorative function of count a more important role in nonresidential building markets where counter-tops are in view of customers or clients, such as countertops in hotels, spas, and high-end restaurants and stores.

Demand for countertops in the nonresidential market is forecast to rise million square feet in 2017. Advances will nonresidential building construction exp ed 2012 base. Countertop demand in the 200 bly impacted by declines in nonresiden-tial ing, as economic weakness and credit con s to cancel or greatly reduce building plans ession. Moreover, the high level of vacancies in office buildings and commercial centers halted construction projects, as businesses could find affordable existing structures instead of building new ones. A turnaround in nonresidential improvement and repair expenditures will further support gains in countertop d through 2017, as the replacement of these items is a commo activity.

SAMPLE TEXT

Unlike the residential market, bathroom countertops ac largest share of the nonresidential market. The amount of sq devoted to bathrooms typically exceeds kitchens, as many n

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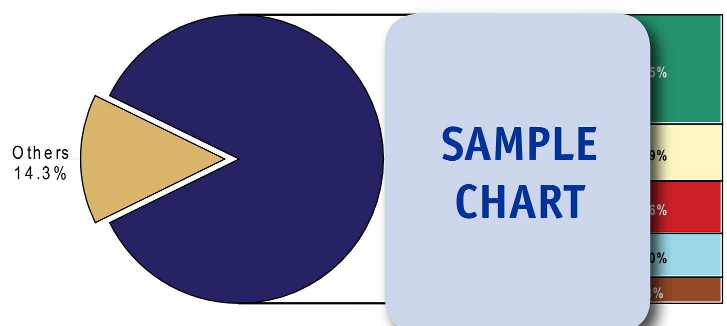
CHART VII-5

SOLID SURFACE COUNTERTOP MATERIALS MARKET SHARE
(77 million square feet, 2012)



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Sample Profile, Table & Forecast

TABLE VI-7

MIDWEST COUNTERTOP DEMAND
(million square feet)

Item	2002	2007	2012	2017	2022
Midwest Housing Stock (mil units)					
sq ft countertop/stock unit					
Midwest Countertop Demand					
By Subregion:					
East North Central					
West North Central					
By Market:					
Residential Building					
Nonresidential Building					
Nonbuilding					
By Application:					
New					
Remodeling					
% Midwest					
Countertop Demand					

SAMPLE TABLE

COMPANY PROFILES

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Mississauga, ON L5R 1B8
Canada
905-712
http://wv

Annual S
Employ

Key Pro

SAMPLE PROFILE

Arclin is a producer of bonding and surfacing materials for the building and construction, engineered materials, agricultural, and natural resource sectors. The Company is majority owned by Black Diamond Capital Management LLC (Greenwich, Connecticut) and Silver Point Capital LP (Greenwich, Connecticut).

The Company is active in the US countertop industry through the production of thermally fused melamine (TFM), which is manufactured by using a combination of high temperature and pressure to fuse melamine coated decorative papers saturated with amino plastic resin to particleboard, medium density fiberboard, or other wood-based composite panels. TFM is used to make countertops, furniture, architectural wall paneling, cabinets, and flooring for residential, commercial, and institutional environments. TFM from the Company is available in over 75 different designs, including the SWISS ALPS, CHERRY, MAPLE, OAK, FRUIT, EXOTICS, COLORS, and WHITES collections. The Company has designated its TFM product line as an E-GEN product because it is designed to reduce manufacturing and downstream environmental impact.

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STUDY COVERAGE

This Freedonia industry study, ***Countertops***, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by surface material, product, market and region of the US. The study also assesses market environment factors, evaluates company market share and profiles 31 US industry competitors.

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Other Studies

Decorative Laminates

Demand for decorative laminates in the US will rise 4.1 percent per year to 11.9 billion square feet in 2018. Of the two largest markets, cabinets will outpace furniture based on a rebound in residential construction spending. Within the dominant low-pressure laminate segment, vinyl films and saturated papers will be the fastest growing types. This study analyzes the 9.8 billion square foot US decorative laminates industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3127 .... February 2014 .... $5100

World Construction Aggregates

World sales of construction aggregates will rise 5.8 percent annually to 53.2 billion metric tons in 2017. The Asia/Pacific region will remain the dominant market and grow the fastest. Crushed stone and other aggregates will offer the best prospects. Hydraulic cement will continue to be a key application. This study analyzes the 40.2 billion metric ton world construction aggregates industry, with forecasts for 2017 and 2022 by type, market, application, world region, and for 28 countries. The study also evaluates company market share and profiles industry players.

#3078 ....December 2013 .... $6100

Decorative Tile

US demand for decorative tile is forecast to rise 6.7 percent per year through 2017, reaching 3.2 billion square feet. Natural stone will overtake porcelain as the second largest tile type in area demand terms, while ceramic tiles remain dominant. Floors will remain the largest application and will grow the fastest, followed closely by walls. This study analyzes the 2.3 billion square foot US decorative tile industry, with forecasts for 2017 and 2022 by material type, application, and market. The study also evaluates company market share and profiles industry players.

#3014 ....April 2013 .... $4900

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to $86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the $51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 .... February 2013 .... $5100

World Refractories

Global refractory demand will rise 3.4 percent annually through 2016 to 46.3 million metric tons. Sales will grow the fastest in developing areas, reflecting the ongoing shift in heavy industry production to countries with low cost structures. The iron and steel market will remain dominant, based on a pickup in steel output. This study analyzes the 39.2 million metric ton world refractory industry, with forecasts for 2016 and 2021 by market, form, material, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2985 .... March 2013................... $6100

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