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World Cabinets

Industry Study with Forecasts for **2018 & 2023**

Study #3245 | February 2015 | \$6300 | 370 pages

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Increases will be driven primarily by robust growth in developing regions, as cabinets increase their market share in residential markets over other storage options such as freestanding furniture and shelves.

World demand to rise 5.5% annually through 2018

Global demand for cabinets is projected to exceed \$64 billion in 2018 on advances of 5.5 percent per year. Increases will be driven primarily by robust growth in developing regions, as cabinets increase their market penetration in residential markets at the expense of other storage options such as freestanding furniture and shelves. An additional boost to global expenditures on cabinets will come from a recovery in demand in developed countries, where building construction was depressed as many countries faced economic downturns.

Key US market to see strong increases in demand

The United States, the world's largest market for cabinets, will see strong increases in demand through the forecast period. Following the collapse in US housing construction that began in 2006, cabinet demand declined for several years. A recovery in building construction spending, particularly in the residential market, will boost US cabinet demand at an annual rate of growth exceeding the industry average. In addition to stronger construction activity, interest in more expansive kitchen and bathroom designs will boost unit demand for cabinets in the US, while rising interest in premium features and finishes will support value growth.

World Cabinet Demand, 2018 (\$64.4 billion)



Asia/Pacific

North America

Western Europe

Other Regions

Asia/Pacific region to claim nearly one-third of global demand

The Asia/Pacific region will be the largest regional consumer of cabinets in 2018, when sales are expected to reach nearly one-third of the global total. The Asia/Pacific region will also see a very strong annual rate of growth through 2018, fueled by rapid demand increases in developing countries, primarily China and India. China is expected to continue to see the fastest increases in cabinet demand of any country, surpassing Japan to become the second largest global cabinet market. Rapid growth in installations of cabinets in new and

existing homes, as well as in nonresidential buildings, will support the robust demand in China.

Western Europe, the largest regional market for cabinets in 2013, is expected to recover through 2018 from the declines suffered during the economic recession. However, by that year it will be surpassed by both the Asia/Pacific region and North America, which can expect more rapid growth. Western Europe's intensive cabinet use and continued interest in high-end features will support the recovery in demand in spite of expected stagnating housing completions in some countries.

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Sample Text, Table & Chart

ASIA/PACIFIC

Australia: Cabinet Demand by Market

Residential demand totaled 69 percent of the Australian 2013 at US\$759 million. The strong nonresidential building market makes the residential share of the market lower than in the US and Canada, residential demand is supported by high market penetration of cabinets in residential kitchens and as well as large average unit sizes that allow for these rooms to be more spacious, boosting volume demand for cabinets. Furthermore, it is installing cabinets with premium design and storage elements during new residential construction or during remodeling projects such as value demand.

New residential demand expanded 6.4 percent annually between 2003 and 2013, when cabinet sales reached US\$212 million. New housing construction stagnated over that time period, growth in both prices and interest in more costly, high-end features as Australians sought improved design and convenience options in cabinets, boosted cabinet expenditures. Through 2018, those trends are expected to continue. Demand will also be boosted by improved design and convenience options that year is forecast to reach similar growth between 2003 and 2013, when cabinet sales reached US\$212 million.

Australian nonresidential demand totaled US\$341 million in 2013, 31 percent of the country's total cabinet consumption. Demand increased rapidly in the early 2000s following trends in nonresidential building construction expenditures, although growth decelerated between 2008 and 2013. Australia's significant stock of nonresidential buildings, especially those that are intensive users of cabinets, including office, in-

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SAMPLE
TEXT

TABLE VI-14

AUSTRALIA: CABINET DEMAND BY MARKET
(million US dollars)

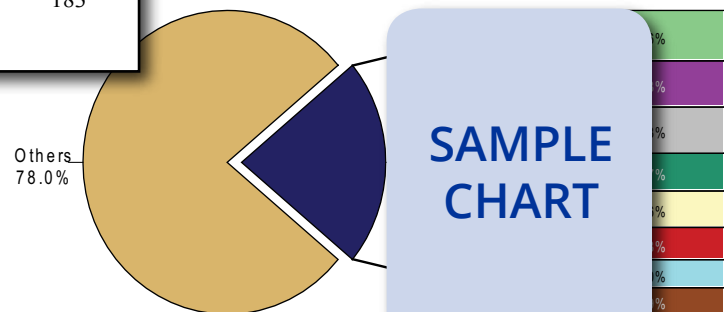
Item	2003	2008	2013	2018	2023
Residential Construction (bil 2012 US\$)					
New Housing Units (000)					
Nonres Bldg Construction (bil 2012 US\$)					
\$ cabinets/000\$ residential construction					
new res cabinets/new housing unit					
\$ cabinets/000\$ nonres construction					
Cabinet Demand					
Residential Buildings:					
New					
Improvement & Repair					
Nonresidential Buildings:					
New					
Improvement & Repair					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD CABINET MARKET SHARE, 2013
(\$49.2 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VI-13
AUSTRALIA: CABINET SUPPLY & DEMAND
 (million US dollars)

Item	2003	2008	2013	2018	2023
Population (million persons)					
per capita GDP					
Gross Domestic Product (bil 2012 US\$)					
\$ building construction/000\$ GDP					
Building Construction (bil 2012 US\$)					
\$ cabinets/000\$ GDP					
\$ cabinets/capita					
\$ cabinets/000\$ building construction					
Cabinet Demand					
net exports					
Cabinet Shipments					

Source: The Freedonia Group, Inc.



COMPANY PROFILES

Cleanup Corporation
 6-22-22 Nishi-nippori
 Arakawa-ku, Tokyo 116
 Japan
 81-3-389
 http://www

Sales: \$
 Employe
 Key Pro

SAMPLE PROFILE

Cleanup manufactures both household equipment and appliances, including kitchen equipment, bath equipment, and washstand fixtures. The Company primarily serves the Asia/Pacific region.

The Company participates in the world cabinet industry through the manufacture of kitchen and bathroom cabinets. Cleanup held the seventh-largest share of the world cabinet market in 2013, at 2.0 percent of global demand. Kitchen cabinets include the CLEANLADY and SS lines of stainless steel cabinets, which are designed to resist heat, corrosion, odors, and mold. Cleanup's SS and CLEANLADY kitchen cabinets are made in wall, base, corner, understove, undersink, and other types. For example, wall cabinets are produced in heights ranging from 50 to 90 centimeters and are offered with or without handles. The SS line of cabinets is available in five door styles in over 20 colors, while the Company's CLEANLADY cabinets are produced in over 10 door styles with glossy, woodgrain, mirror, and other finishes. Cleanup's bathroom cabinets include vanities and mirrored types. Bathroom vanities feature doors and drawers that are designed to close quietly. The Company makes mirrored cabinets in single pane, single wide pane, and triple pane types. Cleanup also produces tall storage

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STUDY COVERAGE

World Cabinets is a Freedonia study that offers historical data (2003, 2008, 2013) and forecasts (2018, 2023) for supply and demand, plus demand by market and application, in 6 regions and 18 countries. In addition, this study assesses market environment factors, analyzes industry structure, evaluates company market share data and profiles 42 global industry competitors.

Related Studies

Home Organization Products

This study analyzes the US home organization product industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., metal and wire, plastic, wood), product (e.g., bins, baskets and totes; shelving; modular units; hanging storage), room (e.g., closets and bedrooms, garages, family rooms, pantries and kitchens, bathrooms and utility rooms), and market (DIY, professional). The study also considers market environment factors, evaluates company market share, and profiles industry competitors.

#3254..... *May 2015*.....\$5300

World Countertops

Global demand for countertops is forecast to rise 4.2 percent per year to 503 million square meters in 2018. The Asia/Pacific region will remain the largest and fastest growing market. While the nonresidential market will post faster gains, the much larger residential segment will provide the most growth in demand. This study analyzes the 409 million square meter world countertop industry, with forecasts for 2018 and 2023 by material, market, application, product, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3250..... *February 2015*.....\$6300

World Decorative Laminates

Global demand for decorative laminates is expected to rise 5.6 percent per year to 10.7 billion square meters in 2018, valued at \$40.8 billion. The Asia/Pacific region will dominate demand and be the fastest growing market, based on its leading position in engineered wood production, which is often given a laminate layer. This study analyzes the 8.1 billion square meter world decorative laminates industry, with forecasts for 2018 and 2023 by product, market, world region, and for 20 countries. The study also evaluates company market share and profiles industry players.

#3202..... *November 2014*.....\$6300

Cabinets

US cabinet demand will rise 6.6 percent annually to \$16 billion in 2018, driven by a rebound in residential building construction. The dominant kitchen cabinet segment will see the fastest gains, with stock cabinets remaining the leading type installed in kitchens. Strong growth in bathroom cabinets will be spurred by design trends that favor more bathrooms. This study analyzes the \$11.6 billion US cabinet industry, with forecasts for 2018 and 2023 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#3161..... *May 2014*.....\$5300

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

About The Freedonia Group

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- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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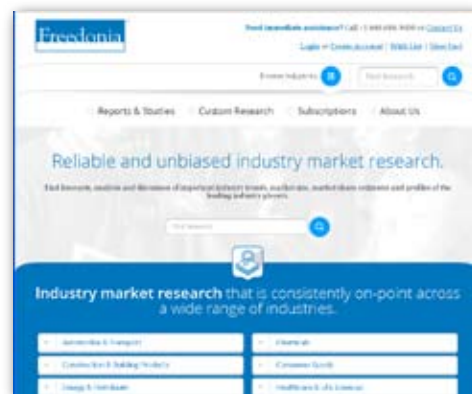
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