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World Countertops

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

Study #3250 | February 2015 | $6300 | 430 pages

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World Countertops

Industry Study with Forecasts for *2018 & 2023*

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OTHER REGIONS

INDUSTRY STRUCTURE

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Demand will benefit from improved building construction activity, particularly in the rebounding developed areas, and from continued efforts to expand and modernize the building stock in developing areas.

World demand to rise 4.2% annually through 2018

Global demand for countertops is forecast to rise 4.2 percent per year to 503 million square meters in 2018. Demand for countertops will benefit from improved building construction activity throughout much of the world, particularly in the developed areas which continue to rebound from the global recession of 2009 and subsequent slow recovery. Gains will also stem from continued efforts to expand and modernize the building stock in developing areas that are constructing large numbers of housing units and nonresidential structures to accommodate the needs of their growing populations.

Asia/Pacific region to be fastest growing market

The Asia/Pacific region was the largest market for countertops in 2013, with nearly half of the global total. This region is generally an immature market in which freestanding furniture, pedestal sinks, and other low-cost alternatives are more common than conventional countertops. Through 2018, the Asia/Pacific region is expected to achieve the fastest gains in countertop sales, with growth driven primarily by trends in China, where demand will be boosted by rising standards of living and continued projects aimed at modernizing housing and nonresidential building stock. India, the region's second fastest growing market, will see gains stemming from the current low level of countertop sales per capita, as the country's economy continues to expand, consumer incomes improve, and distribution networks expand.

Developed regions to be driven by ongoing recovery

Unlike in developing countries, countertops are already widely used in kitchens and bathrooms in North America, Western Europe, Japan, and other developed markets. In 2013, North America was the second largest regional market for countertops. Gains in the region will be supported by the continued recovery in US building construction and, in particular, growth in single-family housing completions, which will further benefit from ongoing consumer preference for spacious kitchens and multiple bathrooms that require more countertop area. Growth in Western Europe will benefit as rebounds in new housing construction in much of the region will boost countertop demand relative to the 2008-2013 declines.

Residential segment to provide most growth

While the nonresidential countertop market will post faster gains through 2018, the much larger residential segment will provide the most growth in global countertop demand, generating over three-quarters of the growth in countertop sales through this period.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Demand by Market & Type

Demand for countertops in India is projected to increase
percent ann 5 million square mete
the fastest in and China. Grow
fueled by s 's construction secto
the inclusi esidential kitchens i
more popu rrent countertop den
capita in In nities for market gro
country's e consumer incomes i
and distrib

SAMPLE TEXT

The re r the majority of co
demand in so through 2018. De
countertop xpected to increase
per year to 2018. Advances wi
by the large size of the Indian housing market: the country is
account for nearly a quarter of all new housing units built in the Asia/Pacific region and a quarter of all housing stock in the region in 2018. This large housing stock bodes well for countertops, as more housing is being built, particularly for the country's growing middle class, a population segment that generally has the monetary resources to purchase installed countertops. Further gains will be restrained by the fact that most homes in India are small, so table tops in the kitchen and pedestal or wall-hung sinks in the bathrooms are still more prevalent than installed countertops and related cabinetry. Additionally, India is still a very rural country, with roughly one-third of its population living in urban areas age that is well below the regional average. Therefore, most still simple, with few built-in features.

The nonresidential market is expected to achieve the fas
through 2018, primarily due to an acceleration in nonresiden
spending, which will boost both the construction of new buil

TABLE VI-10

INDIA: COUNTERTOP DEMAND BY MARKET & TYPE
(million square meters)

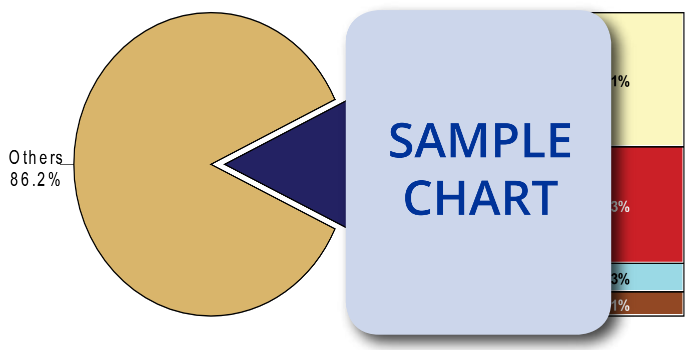
Item	2003	2008	2013	2018	2023
Residential Bldg Construction (bil 2012$)					
sq m countertops/mil $ construction					
Nonres Bldg Construction (bil 2012$)					
sq m countertops/mil $ construction					
Countertop Demand					
By Market:					
Residential					
New					
Remodeling					
Nonresidential					
New					
Remodeling					
By Type:					
Kitchen					
Bathroom					
Other					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD COUNTERTOP MATERIAL MARKET SHARE BY COMPANY
(409 million square meters, 2013)



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Sample Profile & Table, & Study Coverage

TABLE VI-11

INDIA: COUNTERTOP DEMAND BY MATERIAL (million square meters)

Item	2003	2008	2013	2018	2023
Resident Population (million persons)					
sq m countertops/000 capita					
Countertop Demand					
Laminates					
Natural Stone					
Solid Surface					
Engineered Stone					
Other					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Rosskopf & Partner AG
Am Flugplatz 3
99996 Obermehler
Germany
49-36-021-98
http://www.ro

Annual Sales:
Employment:

Key Products: d solid surface materials

SAMPLE PROFILE

Rosskopf & Partner is a manufacturer of ceramic surfacing materials and prefabricated products, including sinks, wash basins, bathtubs, and showers. The privately held company also processes and distributes engineered quartz, solid surface materials, and ceramic surfacing materials via several agreements with third parties.

The Company participates in the world countertop industry via the manufacture of R+P GLASKERAMIK and SELATEC ceramic surfacing materials that can be used in the fabrication of kitchen and bathroom countertops, work tops, and other surfaces. Rosskopf & Partner's SELATEC high-density homogenous porcelain ceramic material is noncombustible, easy to clean and maintain, and resistant to scratches, chemicals, heat, and ultraviolet (UV) light. This material is available in slabs that are 100 centimeters (cm) by 300 cm or 120 cm by 360 cm in size. R+P GLASKERAMIK glass-ceramic material is produced via a sintering process and features stain-resistant properties.

Additionally, Rosskopf & Partner processes and distributes engineered quartz, solid surface materials, and ceramic surfacing materials

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STUDY COVERAGE

This Freedonia study, ***World Countertops***, presents historical data (2003, 2008, 2013) plus forecasts (2018, 2023) for residential and nonresidential types by market (remodeling, new construction) and material in six regions and 18 countries. The study also considers key market environment factors, evaluates company market share and profiles 36 participants in the global industry.

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Related Studies

Hard Surface Flooring

This study analyzes the US hard surface flooring industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by flooring product (e.g., vinyl, rubber, linoleum, tile, laminate, wood) and market (e.g., residential buildings, nonresidential buildings, transportation equipment). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#3284..................April 2015 ....$5300

World Cabinets

World cabinet demand will rise 5.5 percent annually to $64 billion in 2018. The US will remain the largest market and will rebound from recent declines. The Asia/Pacific region will see robust growth, led by China and India. Kitchen cabinets will remain dominant while other types such as garage and office cabinets lead gains. This study analyzes the $49 billion world cabinet industry, with forecasts for 2018 and 2023 by market, application, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3245............. 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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