World Solid Surface & Other Cast Polymers

Industry Study with Forecasts for **2019 & 2024**

Study #3335 | October 2015 | $6400 | 390 pages

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Industry Study with Forecasts for *2019 & 2024*

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Table of Contents

List of Tables

(continued on following page)

World Solid Surface & Other Cast Polymers

Industry Study with Forecasts for ***2019 & 2024***

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List of Tables

(continued from previous page)

OTHER REGIONS

INDUSTRY STRUCTURE

List of Charts

OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

INDUSTRY STRUCTURE

World Solid Surface & Other Cast Polymers

Industry Study with Forecasts for ***2019 & 2024***

Growth will be driven by strong gains in construction activity, further market penetration into countertops, sinks, and flooring, and by consumer upgrades to higher priced solid surface and engineered stone.

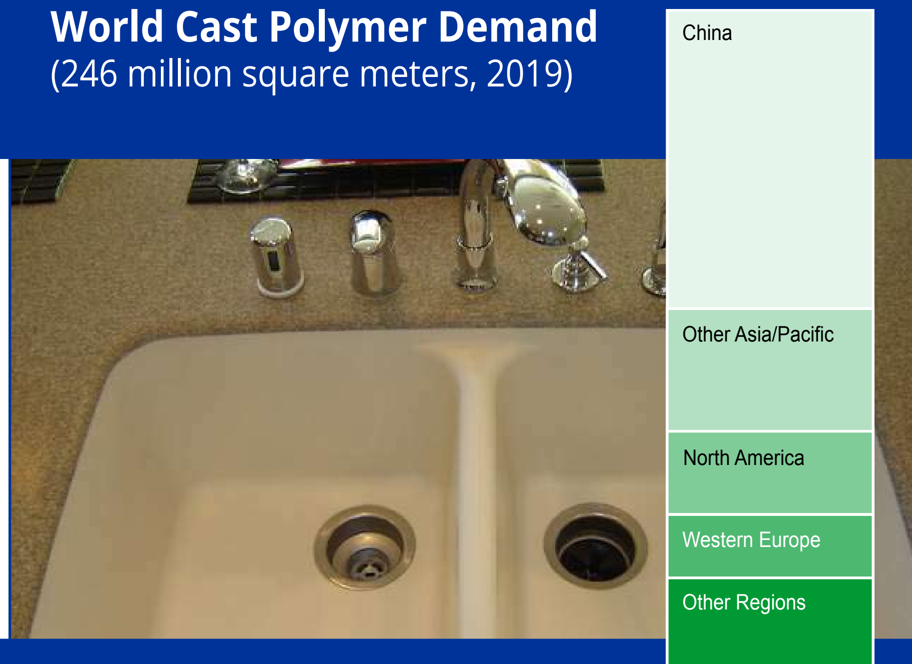
World demand to rise 6.6% annually through 2019

Global demand for cast polymers is forecast to increase 6.6 percent per year to 246 million square meters in 2019, with a value of $23.1 billion. Despite a noticeable slowdown in its construction sector, China will continue to account for a large share of overall gains due to the massive size of its market. Countertops are by far the largest application for cast polymers worldwide and China is not only the leading producer of countertops overall but also relies more heavily on solid surface materials for their construction (more than twice the global average). Most use of cast polymers is in the construction market and strong gains in construction activity worldwide will drive similar advances in cast polymer usage. Cast polymers continue to increase their market share in key applications such as countertops, sinks, and flooring, as increasing personal incomes worldwide provide consumers with the means to upgrade to higher priced surfacing materials such as solid surface and engineered stone.

Engineered stone to be fastest growing product

Solid surface accounted for 56 percent of global cast polymer sales in 2014, and is one of the lowest cost surfacing options in countries like China, which has a large and low-cost manufacturing industry. Engineered stone (e.g., quartz and marble) accounted for the second largest share of sales -- roughly 30 percent in 2014 -- and will also register the fastest gains of all cast polymers going forward. China's rapidly increasing output of relatively low-cost engineered stone has promoted its use around the world, as have intense marketing campaigns highlighting engineered stone's advantages over natural stone. Gel-coated composites such as cultured marble, cultured onyx, and cultured granite, account for the remainder of cast polymer demand. While these materials are less durable than other cast polymers, they are also less expensive and this will promote relatively healthy gains throughout the world, especially in less demanding applications like bathroom countertops.

World Cast Polymer Demand
(246 million square meters, 2019)



China, India to drive gains in dominant Asian market

The Asia/Pacific region dominates cast polymer sales, with roughly 60 percent of total global demand in 2014 (up from 50 percent in 2009). Advances for cast polymers in the Asia/Pacific region will be propelled by the continuing development of the Chinese market, which will account for over half of all additional world demand through 2019. India is also expected to see strong gains as it continues to develop its housing and nonresidential sectors and increase its capacity for cast polymer products. The country increased its production of engineered stone sinks sixfold over the 2004-2014 period.

World Solid Surface & Other Cast Polymers

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Sample Text, Table & Chart

TABLE VII-5

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

Item	2004	2009	2014	2019	2024
Building Construction Expend (bil 2013$)					
sq m cast polymer/mil $ construction					
Cast Polymer Demand					
Residential Countertops					
Nonresidential Countertops					
Sinks					
Other Building Applications					
All Other Applications					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

ASIA/PACIFIC

China: Demand by Type

Demand for cast polymers in China is expected to expan cent annually through 2019 to met the fastest gains in the world. st r market for cast polymers. The fac tops will provide opportunitie in to above average global and re act building construction spendin f new structures as well as the modernization o s will also result from increased market penetration due to increases in personal consumption expenditures and incomes, as individuals have gain the means to remodel their homes, with kitchens and bathrooms and the incorporation or replacement of countertops, sinks, and shower surrounds being common projects. Nevertheless, gains will decelerate from the pace set over the 2004-2014 period, due primarily to a slight slowdown in economic development that will impact construction spending.

SAMPLE TEXT

In 2014, solid surface was the leading material, accounting for 65 percent of demand. In fact, the country was the largest national market for solid surface, accounting for 46 percent of worldwide demand in 2014. Unlike in many other parts of the world, solid surface is not considered a high-value material in China, partially due to the presence of a large number of local suppliers, who generally limit color options to keep prices down.

China's lack of a significant laminate manufacturing industry (traditionally the "workhorse" surface material in many deve of the world) and wide availability of relatively low priced s have led to the latter becoming the country's "workhorse" fo applications, especially residential countertops, largely at the tile and natural stone. Going forward, solid surface will rem ing surface material for residential countertops. However, c

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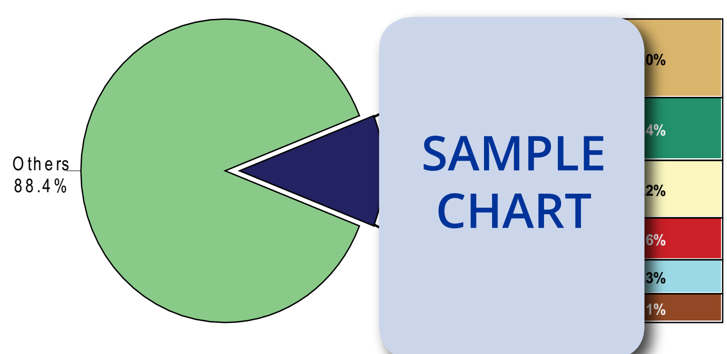
CHART VIII-1

WORLD CAST POLYMER MARKET SHARE, 2014
(178.5 million square meters)



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Sample Profile & Table, & Study Coverage

TABLE V-10

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

Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013$)					
sq m cast polymer/mil $ GDP					
Cast Polymer Demand					
Solid Surface					
Engineered Stone					
Gel-Coated Composites					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

COMPANY PROFILES

BLANCO GmbH & Company KG
Flehinger Straße 59
75038 Oberderdingen
Germany
49-7045-44-81
www.blanco-ge

Annual Sales: ny)
Sales Outside 14, as
reported by co
Employment:

Key Products:

SAMPLE PROFILE

BLANCO is a producer of sinks, kitchen faucets, waste separation and organization systems for residential applications, and a variety of stainless steel products for residential, commercial, institutional, and industrial end uses. The privately held company is 69.3-percent-owned by EGO Holding GmbH (Germany), with the Blanc family holding the remaining stake.

BLANCO is involved in the world cast polymer industry through the manufacture of kitchen sinks fabricated from SILGRANIT II and SILGRANIT composite granite. These materials consist of 80 percent natural granite, with the remainder composed of acrylic resins, ceramic components, and pigments. BLANCO's SILGRANIT and SILGRANIT II composite granite sinks are durable, nonporous, and resistant fading, chipping, scratches, stains, and household chemicals, and heat resistant up to 280 degrees Celsius. Key products in the SILGRANIT II and SILGRANIT collections include BLANCO PERFORMA single-bowl sinks with a raised platform, BLANCO MODEX sinks that feature above-counter installation, BLANCO DIAMOND undermount.sinks,

 323

STUDY COVERAGE

This Freedonia study, ***World Solid Surface & Other Cast Polymers***, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by type and application in six regions and 18 major countries. The study also details key market environment factors, assesses the industry structure, analyzes company market share and profiles 41 industry players worldwide.

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Related Studies

Cabinets

This study analyzes the US cabinet industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., lumber, engineered wood, wood veneer, decorative laminates, metal, glass), product (e.g., kitchen cabinets, bathroom cabinets, store fixture cabinets), market (e.g., residential, nonresidential, nonconstruction) and US geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3372..............January 2016.................$5300

Plumbing Fixtures & Fittings

US demand for plumbing fixtures and fittings will rise 6.3 percent annually to $12.3 billion in 2019. The larger fixtures segment will post faster gains, supported by consumer interest in higher-value products. The fittings segment will benefit from the replacement of older and less-efficient faucets and showerheads with newer models that use less water. This study analyzes the $8.4 billion US plumbing product industry, with forecasts for 2019 and 2024 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#3346............November 2015...............$5500

Countertops

Demand for countertops in the US is forecast to increase 4.2 percent annually to 810 million square feet in 2019, valued at $29.3 billion. Engineered stone, natural stone and various niche surfaces will be the fastest growing countertop materials. The dominant residential market will offer the best growth opportunities. This study analyzes the 660 million square foot US countertop industry, with forecasts for 2019 and 2024 by surface material, product, application, and market. The study also evaluates company market share and profiles industry competitors.

#3301...............August 2015..................$5500

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 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

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