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Cabinets

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

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Demand will be spurred by continuing consumer interest in kitchen and bathroom renovations, including the addition of value-added cabinet amenities such as pull-out shelving, storage racks, and integrated lighting.

US demand to rise 6.4% annually through 2019

US demand for cabinets is projected to advance 6.4 percent annually to \$17.3 billion in 2019, spurred by continuing consumer interest in kitchen and bathroom renovation projects. Even though residential improvement and repair activity has been subdued since the 2007-2009 recession, kitchen renovations and bathroom additions held up better than many other projects, as homeowners tried to improve their homes appearance and to boost property values. Going forward, improving economic conditions will encourage more homeowners to renovate their homes, and many will install cabinets. Demand will also be spurred by the popularity of value-added cabinet amenities, such as pull-out shelving, storage racks, and integrated lighting.

Kitchen cabinets to stay dominant, grow fastest

Kitchen cabinets account for the vast majority of demand and will continue to do so going forward, spurred by growth in residential building construction expenditures and continuing consumer interest in the use of cabinets for storage. Advances will also be supported by consumer interest in cabinets that are more aesthetically pleasing or enhance convenience. Semicustom and custom cabinets that feature intricate carvings will be specified by those looking to beautify their homes, while busy cooks



will opt for deeper cabinets that provide more storage space, and are equipped with easy-to-open doors and readily accessible shelving and storage racks.

Demand for bathroom cabinets is forecast to grow nearly as fast as kitchen cabinets, driven by the ongoing trend toward more bathrooms per home. Also, more homeowners will add bathrooms as part of renovation projects. Smaller bathrooms will likely include a medicine chest for personal items, while larger bathrooms can feature one or more vanities to provide more storage. Demand for other cabinets will rise as consumers look for aesthetically pleasing alternatives to shelves and racks in their bathrooms.

Nonresidential market to generate sizable demand

Though the residential market accounts for the largest share of sales, nonresidential building construction applications also generate sizable demand for cabinetry. In structures where aesthetics are a key design consideration -- such as hotels and senior living facilities -- cabinets can be used to improve the interior appearance of a building. In pharmacies, laboratories, retail sites, and offices, cabinets provide secure storage for medications and other high-value merchandise. Nonresidential demand for cabinets will be fueled by increases in office and commercial and institutional construction.

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Sample Text, Table & Chart

MATERIALS

Wood Veneer

Wood veneers accounted for four percent of the wood-based materials used in cabinet production in 2014. These materials are generally used in high-visibility areas (e.g., doors and cabinet sides) to the cores of engineered wood. Wood veneers are often made from wood types that are more costly because of scarcity, such as cherry and hardwoods. It is generally less expensive to apply a wood veneer to an engineered wood substrate -- such as a door or a cabinet frame -- than to construct a cabinet entirely out of a rare or scarce lumber type.

Use of wood veneers rose between 2009 and 2014, supported by a high level of consumer interest in cabinet refacing. Those homeowners looking to change the appearance their kitchens -- but unable to afford a full renovation -- could do so by changing the appearance of their kitchen cabinets. Some consumers opted to apply wood veneers to the visible surfaces of the cabinet. Refacing is less costly and time-consuming than such projects as cabinet replacement or the replacement of doors and cabinet frames. The application of wood veneers -- particularly those made from exotic wood species -- was seen by some consumers as an aesthetically pleasing alternative than repainting cabinets with decorative laminates.

Domestic cabinet production is forecast to advance 1.5 million square feet (on a 1/32-inch basis) in 2019, spurred by continuing consumer interest in kitchen and bathroom renovation projects. Homeowners looking to refurbish their residences and improve the value and appearance of their kitchen and bathrooms -- but unable or unwilling to replace cabinets because of the cost and inconvenience of a renovation project -- may opt for the application of wood veneers to the visible exterior surfaces of their cabinets. Further gains will be boosted by the increasing use of engineered wood components -- such as particleboard -- in the production of cabinets.

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SAMPLE
TEXT

TABLE V-10

NONRESIDENTIAL BUILDING CABINET DEMAND BY PRODUCT & APPLICATION (million dollars)

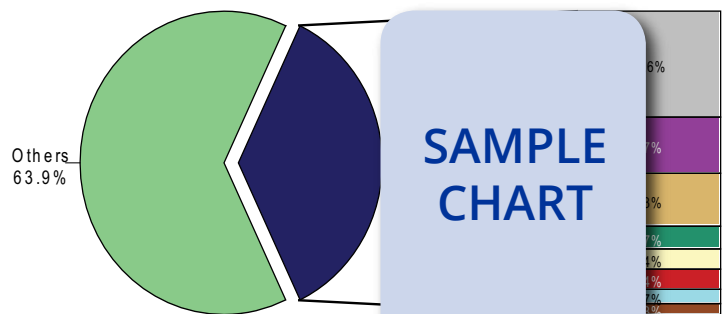
Item	2004	2009	2014	2019	2024
Nonresidential Bldg Construction (bil \$)					
\$ cabinets/000\$ nonres construction					
Nonresidential Building Cabinet Demand					
By Product:					
Kitchen					
Bathroom					
Other					
By Application:					
New					
Improvements & Repairs					
% nonresidential building Cabinet Demand					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VII-1

US CABINET MARKET SHARE, 2014 (\$12.7 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE IV-9
BATHROOM CABINET DEMAND BY MARKET & TYPE
 (million dollars)

Item	2004	2009	2014	2019	2024
Building Construction Expenditures (bil \$) \$ cabinets/000\$ building construction					
Bathroom Cabinet Demand					
By Market:					
Residential Building					
Nonresidential Building					
Nonconstruction					
By Type:					
Vanities					
Other					
% bathroom Cabinet Demand					

Source: The Freedonia Group, Inc.



COMPANY PROFILES

ACProducts Incorporated
 3551 Plano Parkway, Suite 200
 The Colony, TX 75056
 214-469-3000
 www.armstro

Annual Sales:
 Employment:

Key Products: , and laundry room cabinets

SAMPLE PROFILE

ACProducts, which does business as acpi, is a manufacturer and distributor of kitchen, bathroom, and laundry room cabinets. The privately held company is owned by American Industrial Partners (New York, New York), a private investment firm.

The Company is involved in the US cabinet industry through the manufacture of stock and semicustom kitchen, bathroom, and laundry room cabinets. These cabinets, which were introduced in August 2014, are marketed under the ECHELON and ADVANTA brand names. Before August 2014, acpi sold its cabinets under the ARMSTRONG CABINETS PRODUCTS tradename, which it licensed from Armstrong World Industries Incorporated (Lancaster, Pennsylvania).

ECHELON and ADVANTA cabinets are made in three series based on different construction types: ADVANTAGE, PREMIER, and ALLWOOD. ADVANTAGE series cabinets feature 3/4-inch-thick solid wood front frames; 1/2-inch-thick composite top, bottom, and end panels; and 5/8-inch-thick composite shelves. The Company's PREMIER series, which is intended for budget-conscious customers, features composite panel construction, multi-ply hardwood plywood

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STUDY COVERAGE

This Freedonia study, *Cabinets*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by material, market, product, and region of the US. In addition, the study examines key market environment factors, assesses the industry structure, analyzes company market share and profiles 39 competitors in the US cabinet industry.

Related Studies

Decorative Laminates

This study analyzes the US decorative laminate industry. It presents historical demand data (2005, 2010 and 2015) and forecasts (2020 and 2025) by raw material (e.g., plastics, overlays, adhesives, wood substrates), product (e.g., low-pressure laminates, high-pressure laminates, edgebanding) and market (e.g., cabinets, furniture, store fixtures, flooring, wall panels, countertops). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3385..... *March 2016*.....\$5300

World Prefabricated Housing

This study analyzes the world prefabricated housing industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (e.g., manufactured and modular housing, temporary housing), world region and major country. The study also examines the world market environment, details industry structure, evaluates company market share, and profiles industry participants.

#3375..... *February 2016*.....\$6200

World Solid Surface & Other Cast Polymers

Global demand for cast polymers will rise 6.6 percent yearly to 246 million square meters in 2019, with a value of \$23.1 billion. The Asia/Pacific region will remain the largest and fastest-growing market. Solid surface will remain the dominant type while engineered quartz, marble and other stone will grow the fastest. This study analyzes the 179 million square meter world cast polymer industry, with forecasts for 2019 and 2024 by type and application for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

#3335..... *October 2015*.....\$6400

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 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

About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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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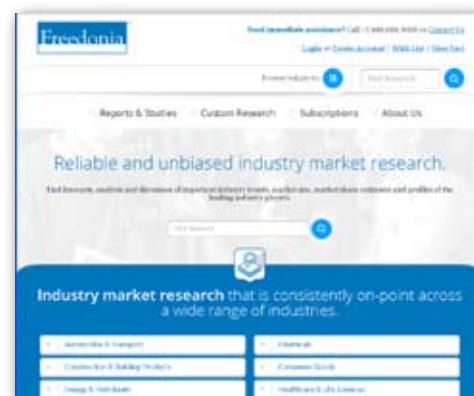
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