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ABSTRACT FOR THE CATALINA REPORT ON NATURAL AND MANUFACTURED STONE PRODUCTS

SUMMARY OF MAJOR FINDINGS

Catalina Research and Ceramic Tile & Stone Consultants has released an in-depth industry investigation on the $6.1 billion (2010 estimate) U.S. natural and manufactured stone product industry. This market is expected to begin to recover in the second half of 2010, after declining at double-digit rates between 2007 and 2009. The recovery will be led by the upturn in residential remodeling spending. Residential remodeling spending is being stimulated by an estimated 9.6% increase in existing home sales during 2010, and follows a 4.9% gain in 2009. These trends indicate that the recovery in stone products will be led by rising sales of replacement kitchen and bathroom countertops and floor tiles. The builder market is also expected to turn upwards in late 2010 due to the 23.7% increase in residential building permits in the first quarter of this year. However, the estimated 25.0% drop in nonresidential construction spending during 2010 will continue to be a drag on industry demand.

STONE INDUSTRY TRENDS

Catalina Research uncovered these trends in our 250-page report on the U.S. and Canadian stone industry. Report sections cover all aspects of this industry including mines and quarries, stone product processors and fabricators, manufactured stone producers, importers, end-use markets, and installers. In the Executive Summary section, Catalina conducts a growth analysis of the U.S. supply of granite, marble and travertine, limestone, and other stone, as well as the sourcing country of origin. Catalina also provides data on rough stone and stone product price trends.

STONE INDUSTRY SHIPMENTS AND IMPORTS

This in-depth analysis has separate sections on U.S. shipments and imports of rough dimension stone, dressed or worked dimension stone, and manufactured stone (precast concrete). Each section provides dollar and quantity shipments by type of stone and type of use. In addition, import data is segmented by major country of origin.

END-USE MARKETS AND FACTORS DRIVING DEMAND

U.S. stone product industry market sales are segmented by end-use market and type of installation. End-use market sales are provided for residential and nonresidential markets. Sales are also broken out for stone countertops, flooring, other building products, and monuments. In addition, installer revenues were analyzed for interior and exterior stonework. An analysis of factors driving demand is provided as well. Data trends include spending on new residential and nonresidential building construction, total housing demand, housing starts and permits, average price and size of new homes, number of bathrooms per completed housing unit, homeowner remodeling spending, mortgage interest rates, and other economic and demographic trends. Home centers and other distribution channel sales of flooring and countertops are analyzed as well. Export shipments are provided by product and by major country of destination. Catalina has provided data on the Canadian market in a separate section. This section includes data on the Canadian supply of rough stone, stone products, and imports and exports.

INDUSTRY COST STRUCTURE AND PROFITABILITY

Catalina analyzed the cost structure and profitability of U.S. stone quarries, processors/fabricators. and manufactured stone producers. This analysis covers material inputs, the labor situation, and facility capital expenditures. Shipments of stone and related product working machinery are provided for U.S.- and foreign-based manufacturers.

COMPETITIVE ENVIRONMENT

Catalina evaluated the competitive environment covering the position of the over 2,400 U.S. stone product processors/fabricators, quarries, manufactured stone producers, as well as foreign-based suppliers. Catalina also estimated the sales of leading U.S. suppliers. In addition, Ceramic Tile & Stone Consultants surveyed the leading fabricators and largest importers to develop a snapshot of the top competitor characteristics, determine the products they imported, and review the customers and end-use markets they target. The leading distributors are reviewed as well.

Date: July 2010 **Report No. CR065**
Pages: 250 **Price: $3,495.00, email or paper copy**

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