

## METHODOLOGY

This study examines the US market for cabinets, defined as enclosed storage units that are permanently affixed to a structure. Cabinet products discussed include kitchen (stock, semicustom and custom), bath (vanities, medicine cabinets, linen cabinets and other), and other (store display cabinets, entertainment centers, home office cabinets, garage cabinets, laboratory cabinets and other special-function cabinets). While these product categories are often the same as the rooms in which the cabinets are used (i.e., bath cabinets are almost exclusively used in bathrooms), the cabinet type does not always match the location of the installed cabinet, as in the case of kitchen cabinets adapted for use in such other locations as laundry rooms, family rooms or bedrooms. Furniture pieces, ready-to-assemble cabinets, bookcases and other casework that fulfill similar storage functions are not included in the scope of the study. Home organization products such as closet organizers and open shelving are also excluded.

The study also analyzes material use in cabinet production, including solid wood, wood veneers, engineered wood materials (e.g., particleboard, medium density fiberboard and plywood) and non-wood materials (e.g., decorative laminates, metal, glass and other).

Demand for cabinets is presented by intended end use, including residential buildings, nonresidential buildings and non-construction applications (e.g., recreational vehicles and boats). In addition, the study discusses cabinet demand by US region. Moreover, major cabinet manufacturers are identified and profiled, and the key industry competitive variables are discussed. The entire report is framed within the cabinet industry's economic, technological and market environments.

Historical data for 1997, 2002 and 2007 and forecasts to 2012 and 2017 are provided for cabinet shipments, imports, exports and demand in current dollars (including inflation). All dollar figures represent values at the manufacturers' level rather than the retail level. The term "demand" -- used interchangeably with "market," "sales" and "consumption" -- is defined as all shipments from US plants, plus imports minus exports. Some of the components in the tables may not add to the totals because of rounding. Macroeconomic and demographic indicators were obtained from Freedonia Group's Consensus Forecasts dated April 2008.

Information and data on cabinets were obtained from a variety of primary and secondary sources, including government publications, trade associations (e.g., Kitchen Cabinet Manufacturers Association, National Kitchen and Bath Association), industry participants, online databases and other Freedonia studies. Historical data are based on US Bureau of Census figures, including the Economic Census and Annual Survey of Manufactures. These and supporting data were adjusted as necessary in light of consultation with personnel of participating companies and other industry contacts. Secondary data and background information were obtained from various trade publications, including *Builder*, *FDM Magazine*, *Journal of Light Construction*, *Professional Builder*, *Professional Remodeler* and *Wood & Wood Products*. Corporate annual reports, SEC Form 10-K filings, product catalogs and other company-provided information were used extensively in framing the industry environment and as input for market size assessment.