

# Kentley Insights

## 2021 Market Research Report

### Wood Kitchen Cabinet and Countertop Manufacturing

May 2021

Report: 33711

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## Report Methodology

Kentley Insights is the leader in data-driven industry market research reports. This report includes extensive data sets and forecasts on Wood Kitchen Cabinet and Countertop Manufacturing, which will provide you with key insights and benchmarks to create a broad and in-depth diagnostic and understanding of any company in the industry.

For this report, the core data is sourced from comprehensive business surveys filled out by companies in the Wood Kitchen Cabinet and Countertop Manufacturing industry. Our analysts create the industry forecasts utilizing historical trends, industry dynamics, econometrics, and macroeconomic trends.

## Industry Definition

### Wood Kitchen Cabinet and Countertop Manufacturing

This industry includes companies primarily engaged in manufacturing wood or plastics laminated on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding). The cabinets and counters may be made on a stock or custom basis.

## Industry Snapshot - Revenue & Growth

Below is the revenue and growth snapshot for Wood Kitchen Cabinet and Countertop Manufacturing, covering industry size, growth, forecasts, revenue per company, product line concentration, pricing, sales per capita, sales per facility, and benchmarks.

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### Overall Industry Size

The overall 2020 revenues of the Wood Kitchen Cabinet and Countertop Manufacturing was \$13.8 billion. The industry is about average in industry size, ranking in the top 60% of manufacturing industries.

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### Overall Industry Growth

Over the past 3 years, industry revenues have been shrinking at an annual rate of -1.1% per year. This growth rate lags the 0% average for manufacturing industries and ranks it in the bottom 40% of all manufacturing industries.

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### Overall Industry Growth Forecast

Given the macroeconomic climate and industry dynamics, the forecasted industry revenue growth rate for the next 5 years is 5.1% per year for the Wood Kitchen Cabinet and Countertop Manufacturing industry.

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### Revenue per Company

In 2020, the average revenue per company for the industry was approximately \$2.3 million, which declined at a -0.7% annual rate over the past 3 years.

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### Product Line Concentration

For Wood Kitchen Cabinet and Countertop Manufacturing, the top product line make up 40% of revenue, which ranks in the bottom 40% of manufacturing industries for product line concentration.

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### Producer Pricing Index

From 2019 to 2020, PPI for the industry was 0.9%. While over the past 5 years, PPI has averaged 1.3% per year.

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### Industry Revenue as a Percent of State Manufacturing

For Wood Kitchen Cabinet and Countertop Manufacturing, South Dakota has the highest industry revenue as a % of state manufacturing at 1.4%. This is 501% higher than the average of 0.2% per state.

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### Sales per Facility

For the industry, Indiana has the highest sales per facility at \$6.8 million, which is 193% higher than the U.S. average of \$2.3 million in sales per facility.

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## Industry Snapshot - Costs, Capital & Profit

Below is an industry snapshot on operating expenses, employee productivity, payroll, job categorization, profitability, and relevant Wood Kitchen Cabinet and Countertop Manufacturing benchmarks.

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### Operating Expenses

In 2020, the operating expenses as a percent of revenue for Wood Kitchen Cabinet and Countertop Manufacturing was 87.3%, and over the past 3 years total operating expenses for the industry grew at -0.6% per year.

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### Operating Expense Breakdown

The breakdown of operating expenses for the industry is as follows: 38.2% for employee expenses, 47.4% for cost of materials, 5.9% for buildings and expenses, and 8.5% for other expenses.

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### State Population per Industry Employee

South Dakota ranks #1 in employment density within the industry, with 1 out of every 398 people in the state in the industry.

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### Employee Productivity

In 2020, the sales per employee declined -1.7% to \$149,769, which ranks the industry in the bottom 20% of manufacturing industries.

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### Payroll per Employee

In 2020, payroll per employee equaled \$38,753 for the industry, which ranks it in the bottom 20% of manufacturing industries. Payroll per employee has grown at an annual rate of 0.1% over the past 3 years.

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### Payroll by State

Massachusetts is the highest paying state, with a payroll per employee of \$50,300, which is 29.5% higher than the U.S. average.

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### Job Categorization

The jobs breakdown for Wood Kitchen Cabinet and Countertop Manufacturing is as follows: 15% of the jobs are in management and finance, 79.5% of the jobs are in operations, while 5.5% of the jobs are in sales, marketing and technology.

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### Profitability

71.1% of companies in the industry are profitable, with an average net income of 7.7% of revenues, which ranks the industry in the bottom 40% of manufacturing industries.

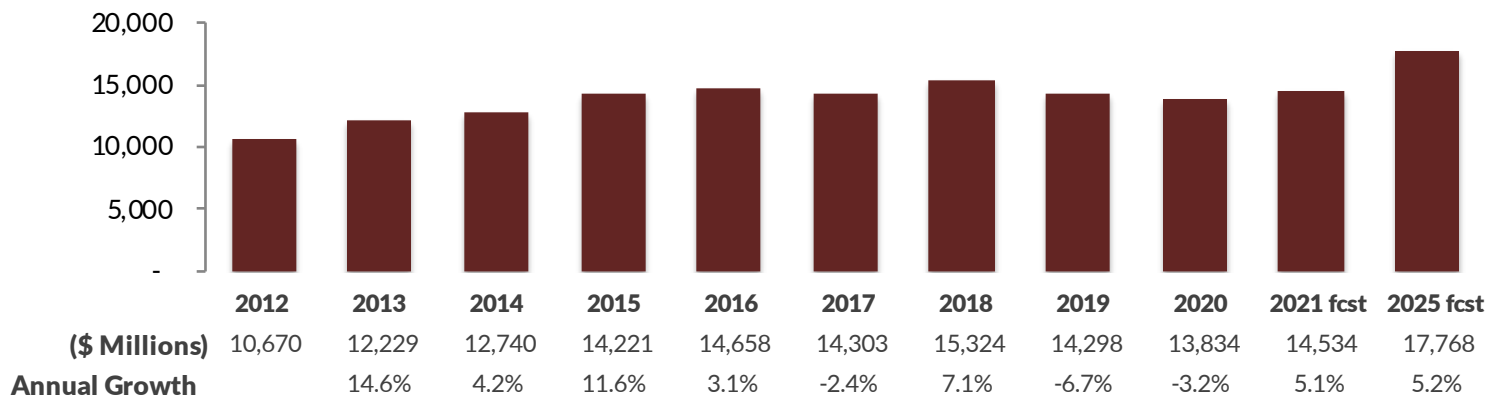
# **Section One**

## **Revenue & Growth Benchmarks**

## Industry Growth Details

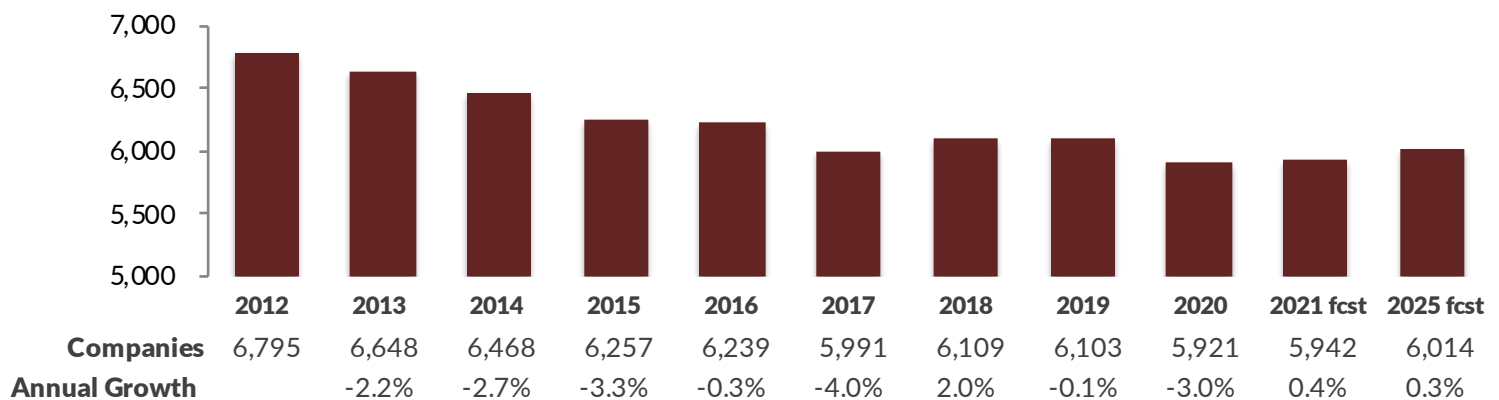
To get a macro level view of Wood Kitchen Cabinet and Countertop Manufacturing, below are the historical details and industry growth forecasts for total industry revenues, number of companies, and number of facilities.

### Industry Revenue (\$ Thousands)



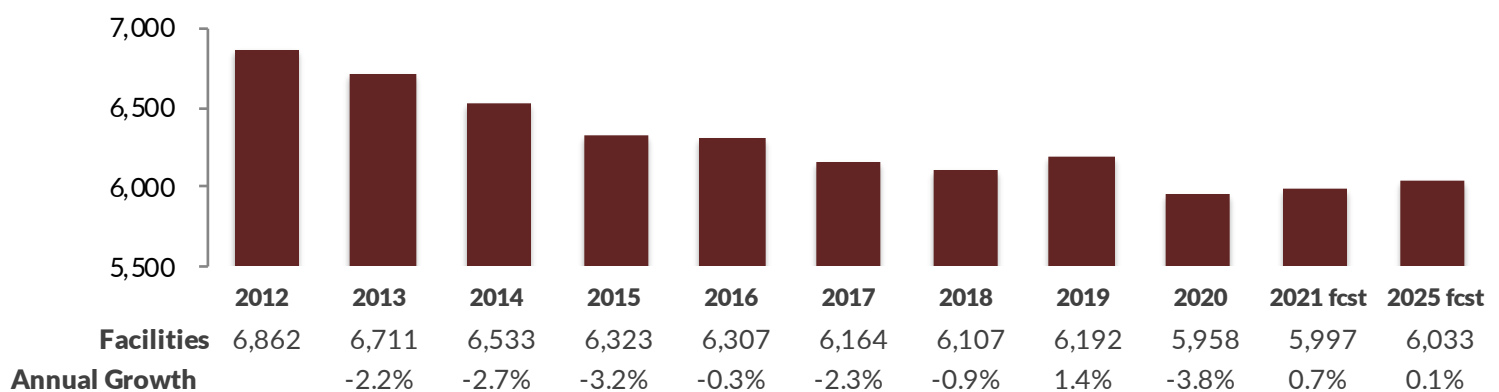
Compound Annual Growth Rate **-1.1%** 3-Year **-0.5%** 5-Year

### Number of Companies



Compound Annual Growth Rate **-0.4%** 3-Year **-1.1%** 5-Year

### Number of Facilities (i.e., separate facilities and facilities)

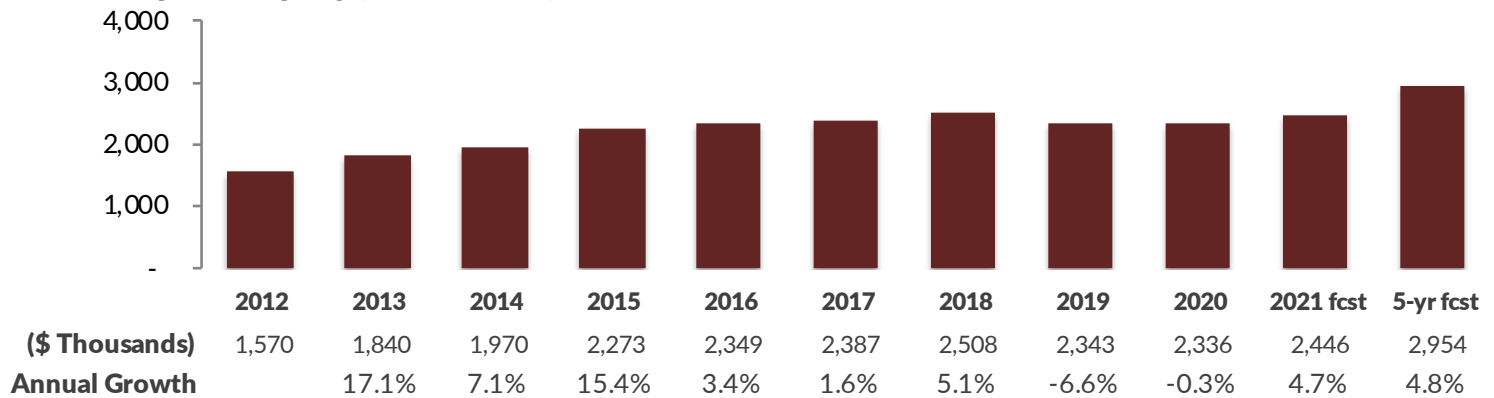


Compound Annual Growth Rate **-1.1%** 3-Year **-1.2%** 5-Year

## Growth Benchmarks

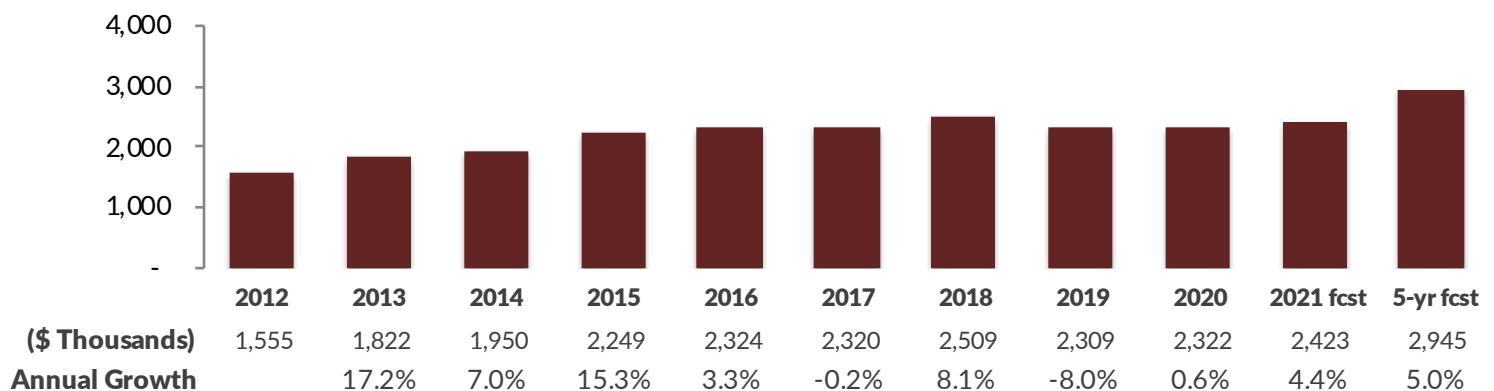
Below are the normalized growth benchmarks for Wood Kitchen Cabinet and Countertop Manufacturing, including revenue per company, revenue per facility, and facilities per company. These metrics are typically better to use to benchmark a company's performance, since they normalize for company and facility growth.

### Revenue per Company (\$ Thousands)



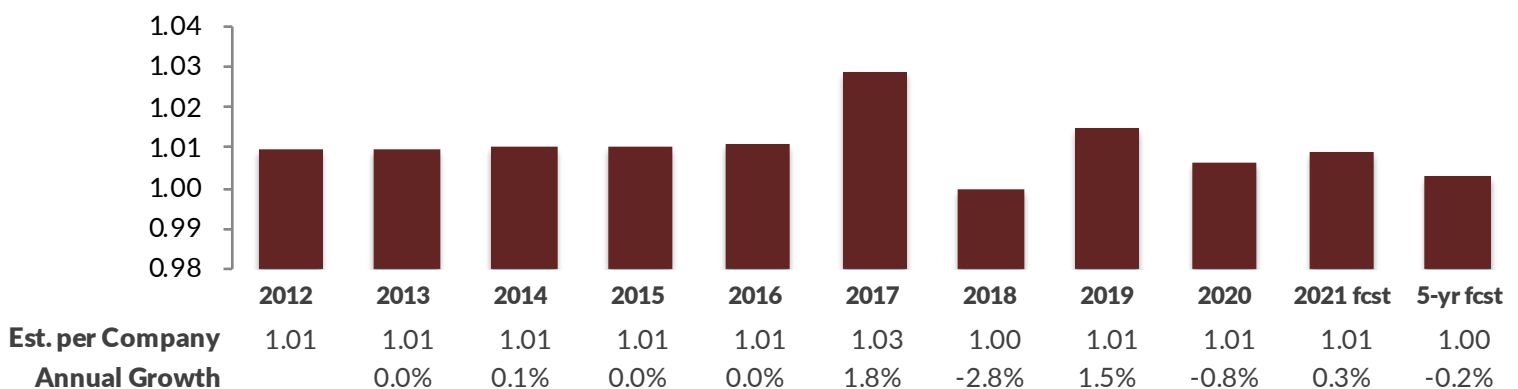
Compound Annual Growth Rate **-0.7%** 3-Year **0.6%** 5-Year

### Revenue Per Facility (\$ Thousands)



Compound Annual Growth Rate **0.0%** 3-Year **0.6%** 5-Year

### Facilities per Company



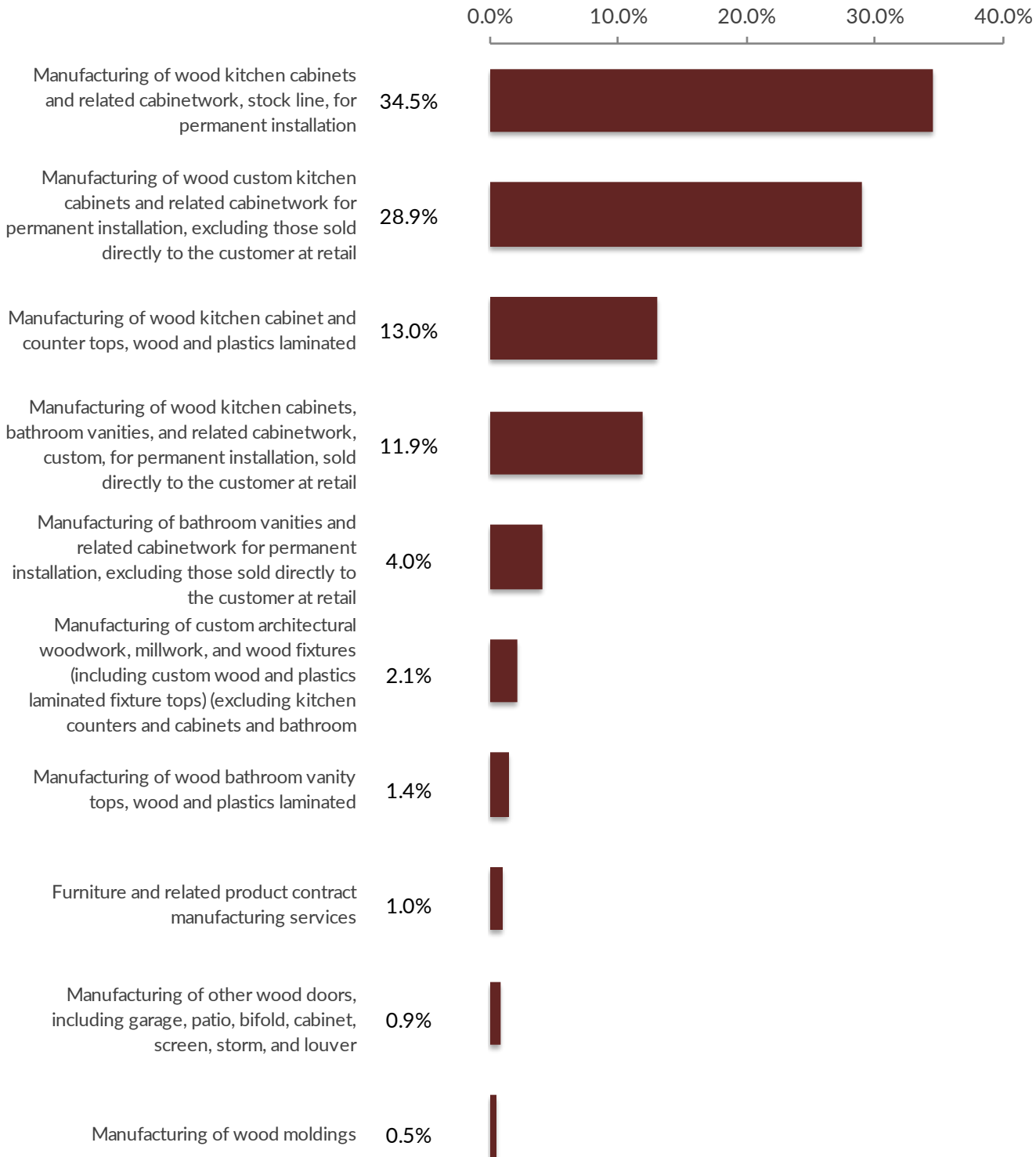
Compound Annual Growth Rate **-0.7%** 3-Year **-0.1%** 5-Year



## Breakdown of Top Product Lines

Below represents industry sales as a percentage of the top product lines, which is used to highlight potential growth opportunities, strengths, and weaknesses.

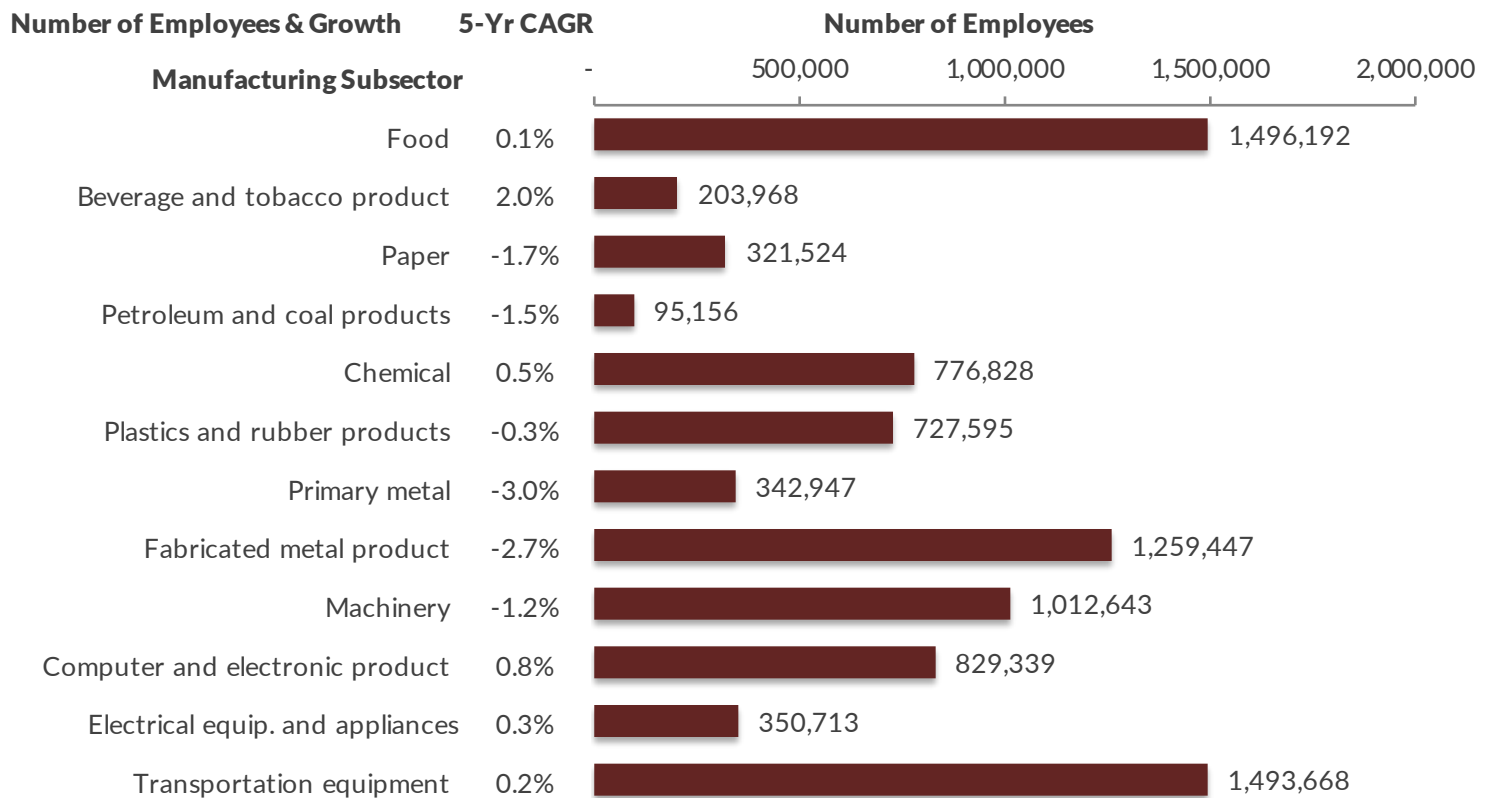
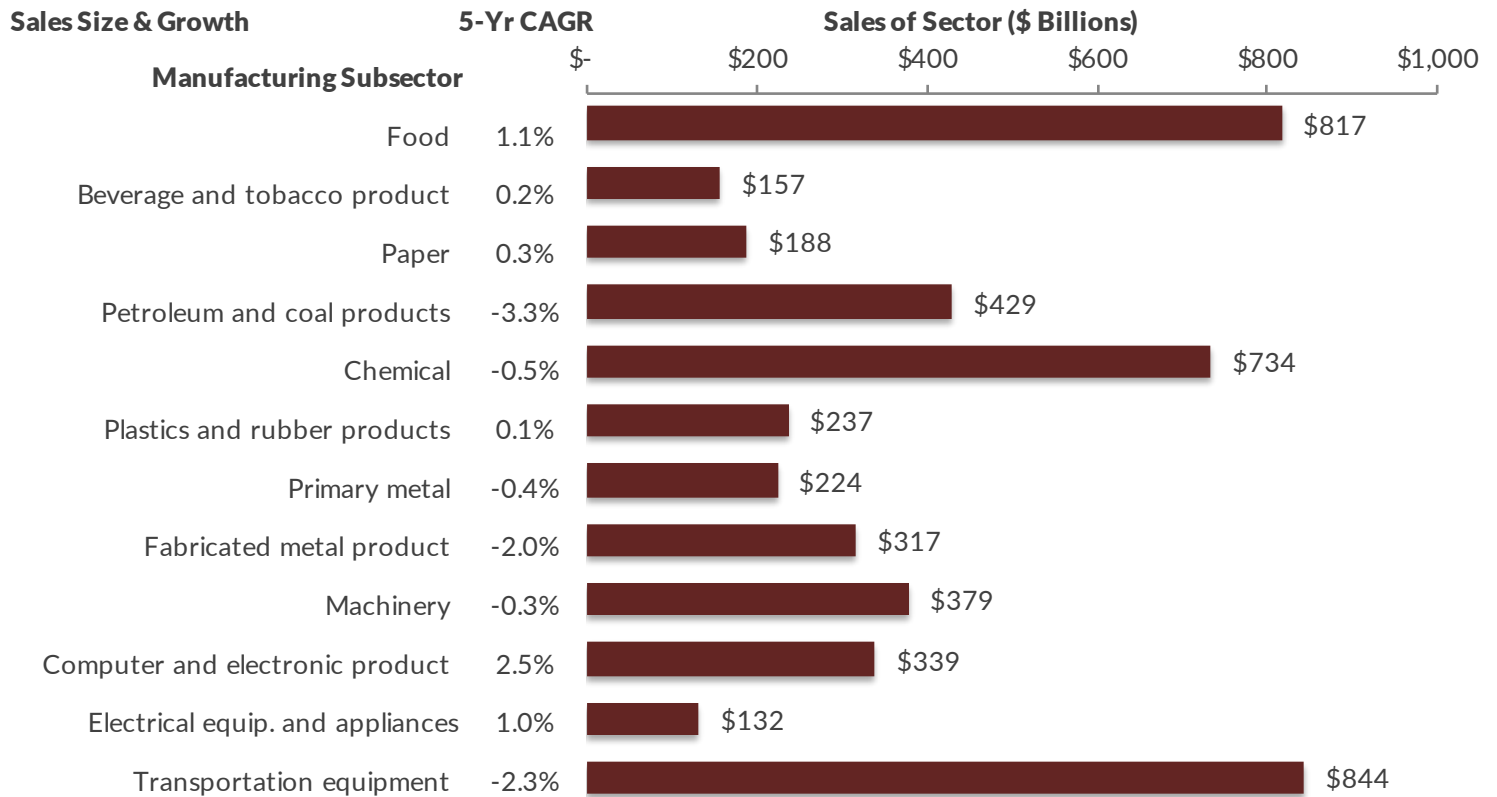
### Breakdown of Sales by Top Product Lines (%) Wood Kitchen Cabinet and Countertop Manufacturing



Note: nsk - Not Specified by Kind

## Manufacturing Sector Growth

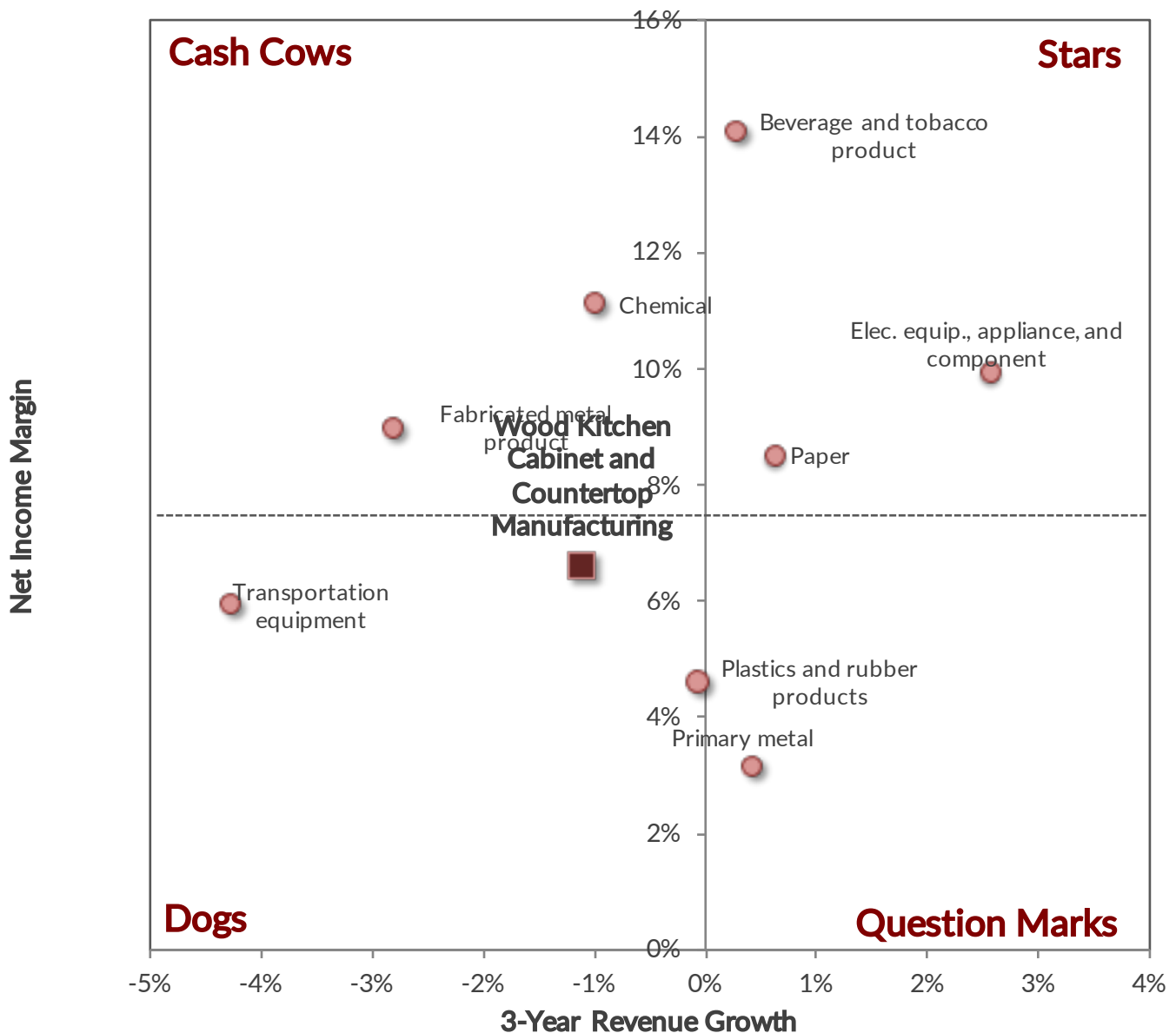
Below is the size and growth of all of the major manufacturing subsectors, which is typically utilized to understand how an industry is performing against the macro economy.



## Income vs. Revenue Growth Matrix

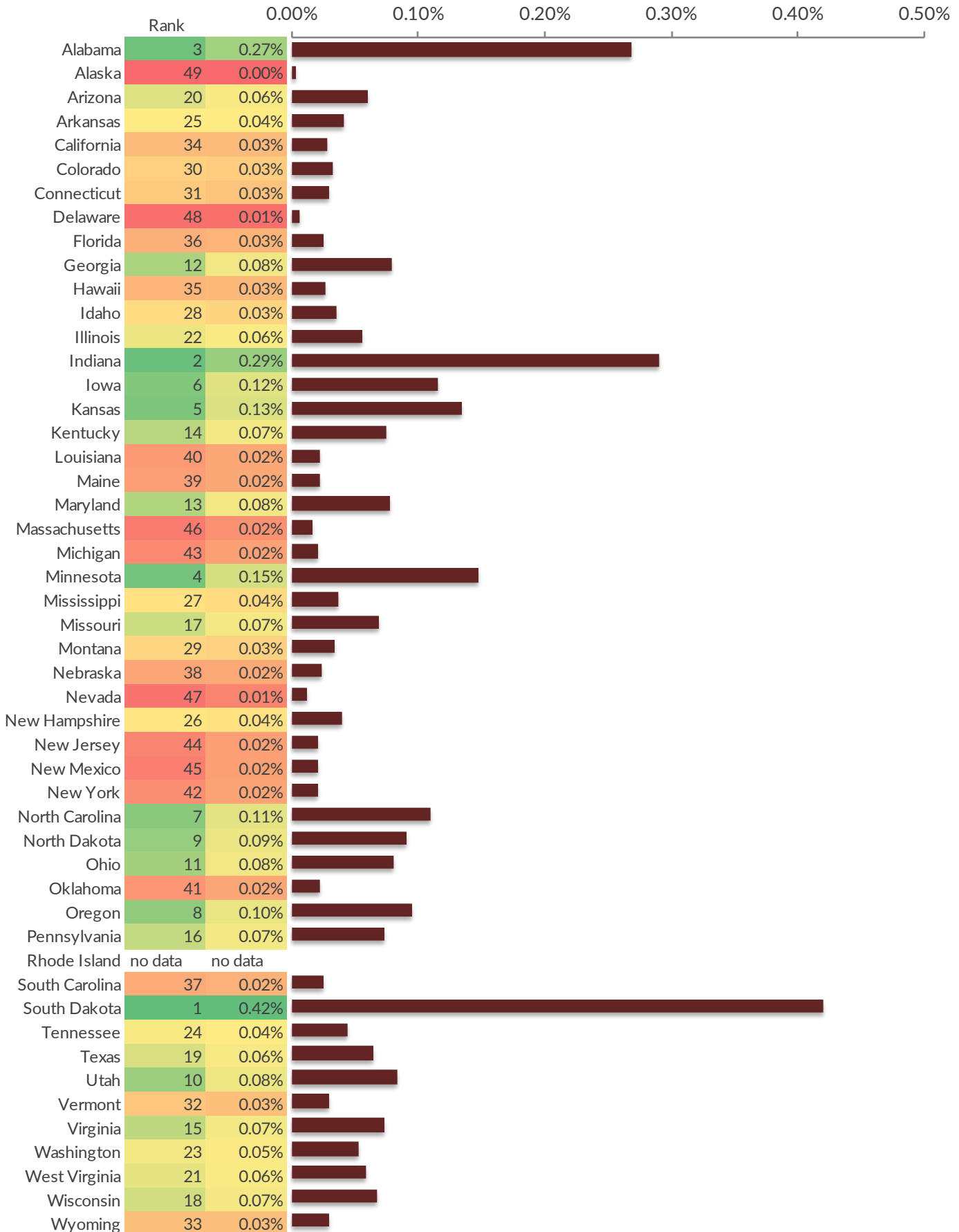
Similar to the famous BCG Matrix, though substituting net income margin for relative market share and taking it to the industry level, the Income vs. Revenue Growth Matrix is an insightful tool to create context for an industry and companies. Where is your industry on the matrix? And, more importantly, where does your company fall on the matrix?

Industries which can generate high net income margin and high revenue growth are known as the Star industries, which often attract higher levels of competition chasing the growth. Those that generate low net income margin and low revenue growth are known as the Dogs. Often, Dog industries are very mature, and growth comes from consolidation and driving costs out of the business. Industries with high net income margin and low revenue growth are Cash Cows, which typically are more mature and have less overall investment, but have nice industry dynamics to protect the margins of the industry. Question Mark industries are those that have high revenue growth, but low net income margin. Companies in Question Mark industries, which can drive competitive differentiation and a higher net income margin, can often realize significant profit growth.



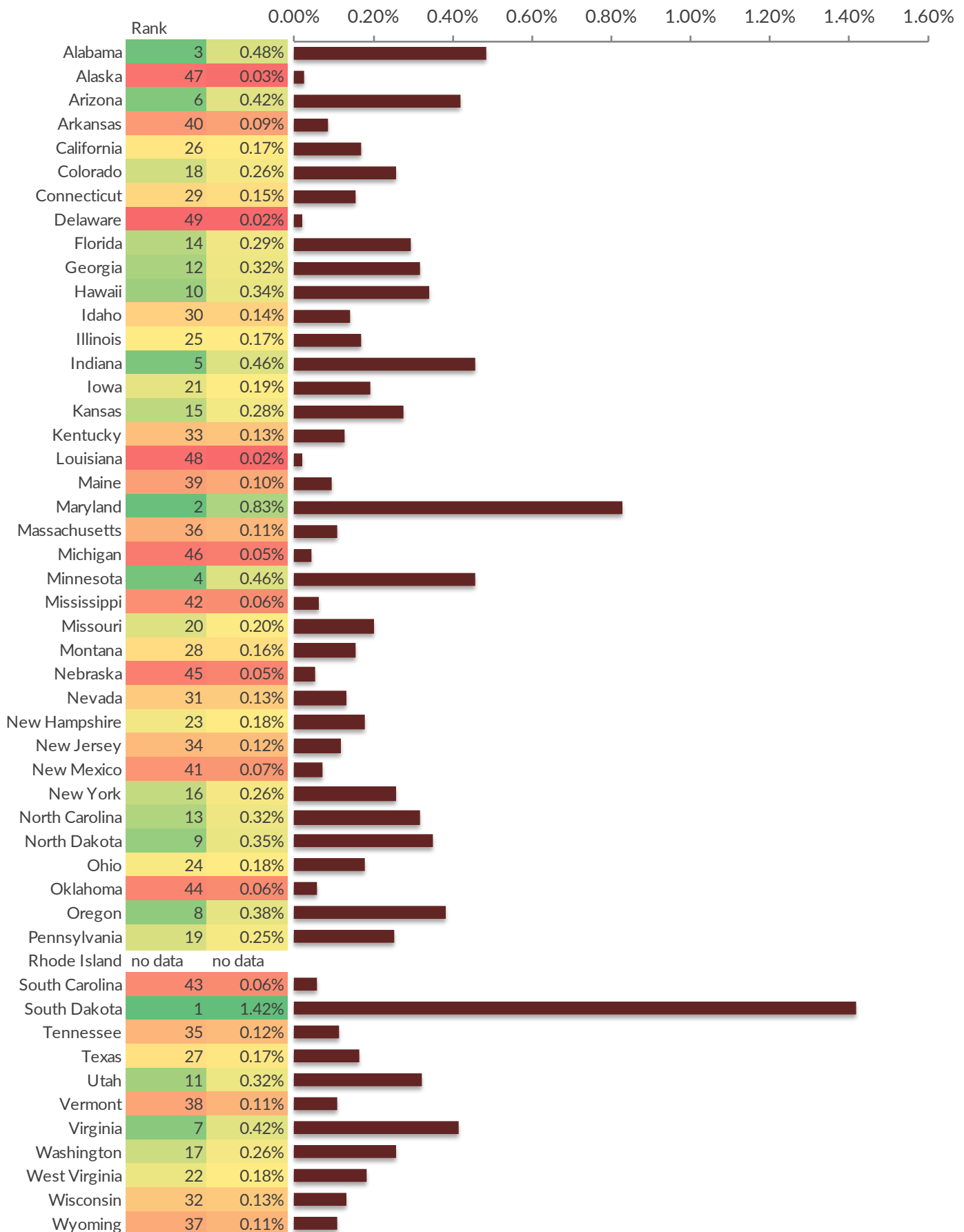
## Industry Revenue as a % of State GDP

Industry revenue as a percentage of state GDP is a go-to metric to understand how important your industry is to a state and sometimes the market potential in the states you compete in. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



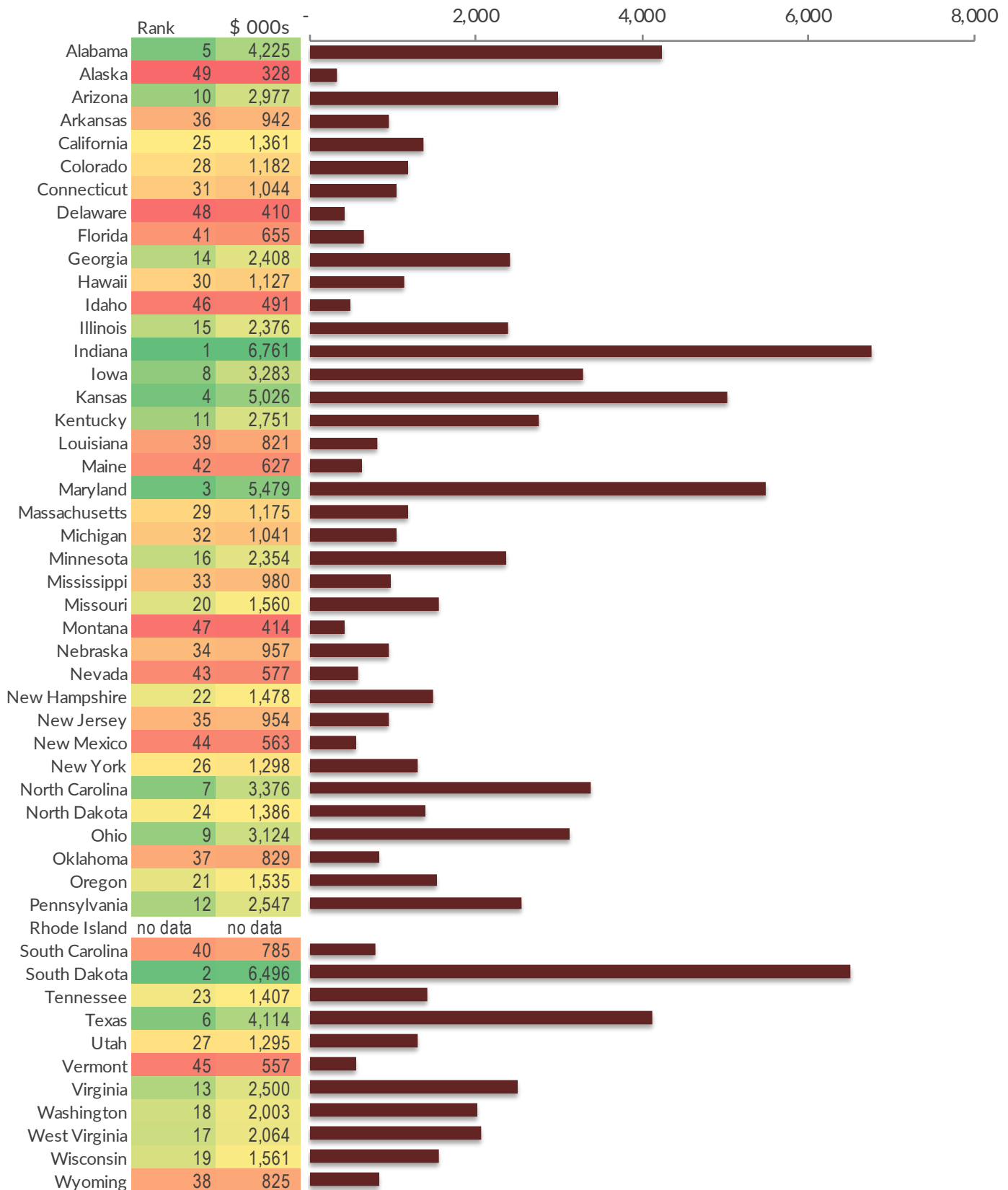
## Industry Revenue as a % of State Manufacturing GDP

Industry revenue as a percentage of state manufacturing GDP is a go-to metric to understand how important your industry is to a state's manufacturing sector. "No data" indicates an insufficient sample size.



## Sales per Company by State

Sales per company highlights the competitive intensity and leverage of companies in a state. Those states with high sales per company most likely face increasing competition. "No data" indicates no industry manufacturing facilities or an insufficient sample size.

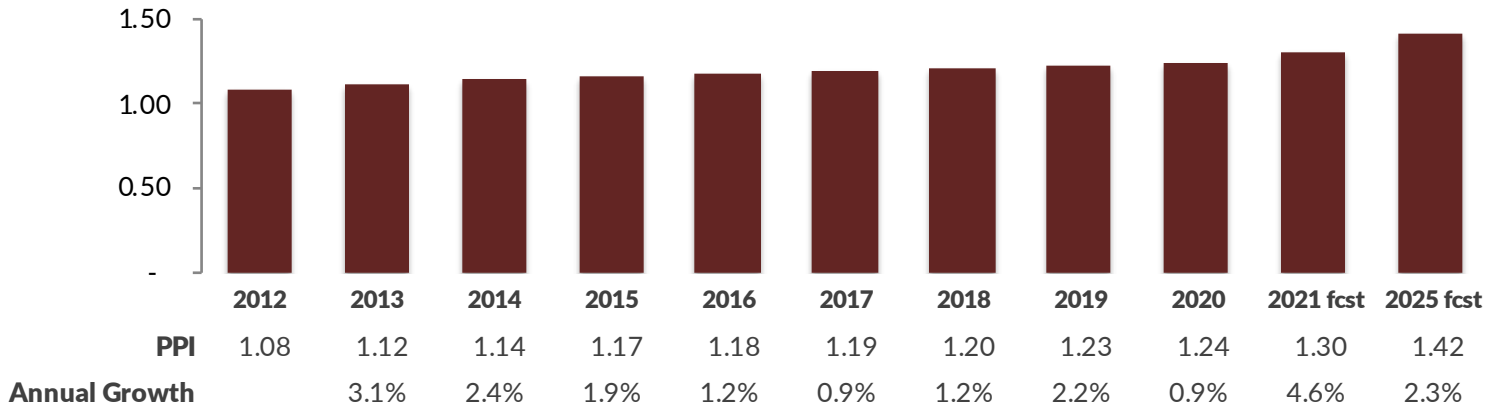


## Producer Price Index (PPI)

Understanding the producer pricing dynamics of an industry is critical to help inform the decisions of a company. Below is the historical and forecasted producer pricing index of the industry, and the seasonality of PPI over the past 4 years.

### Wood Kitchen Cabinet and Countertop Manufacturing Producer Pricing Index

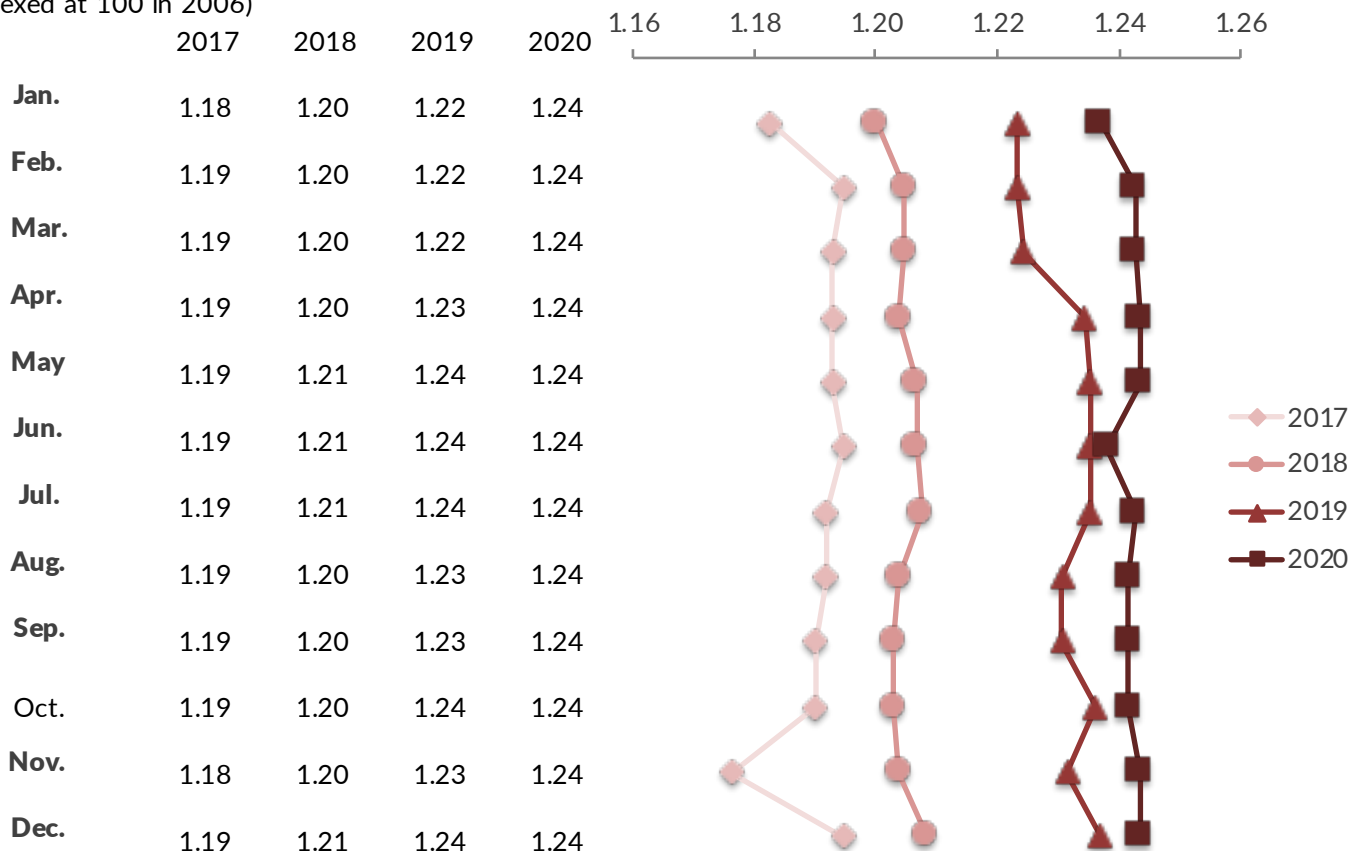
(Indexed at 100 in 2006)



Compound Annual Growth Rate **1.4%** 3-Year **1.3%** 5-Year

### Wood Kitchen Cabinet and Countertop Manufacturing Industry PPI

(Indexed at 100 in 2006)

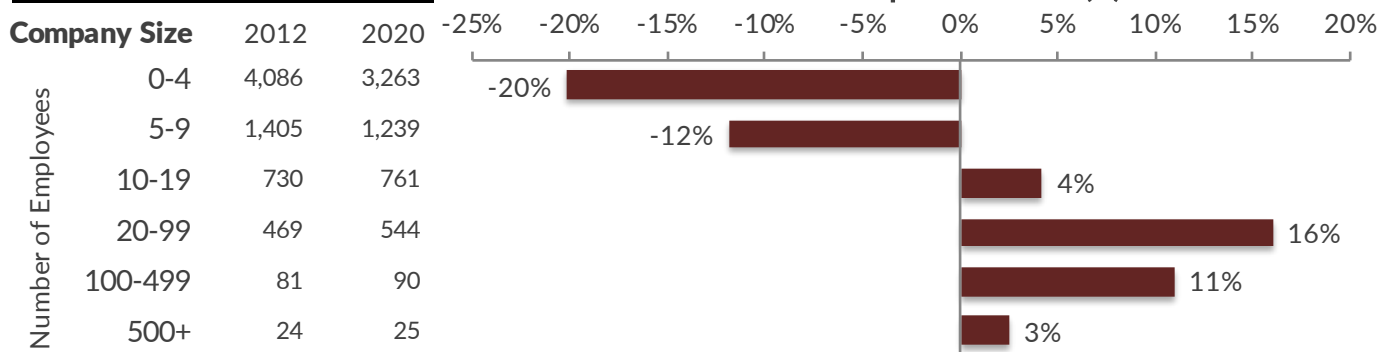


## Consolidation Analysis

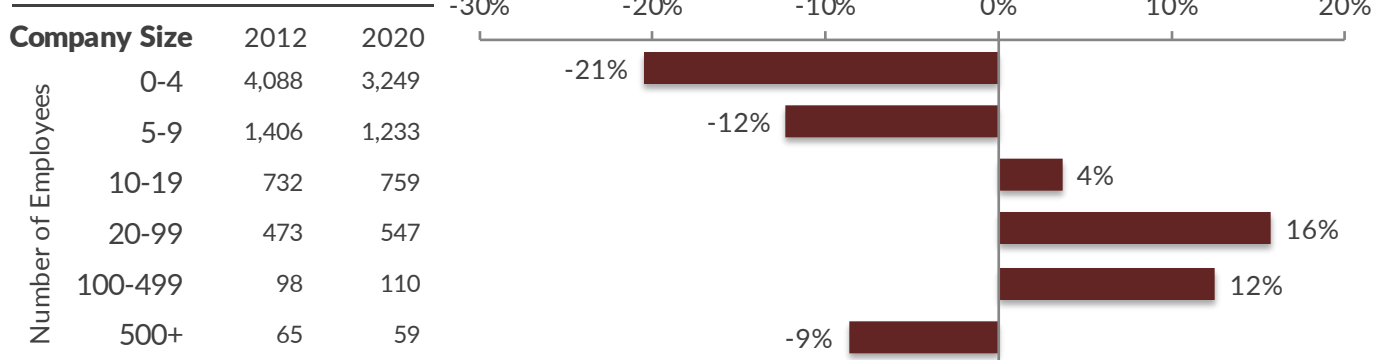
While industry level benchmarks are useful, digging into the growth and consolidation dynamics by the size of companies (e.g., 0-4 employees = small company, 500+ employees = large company) can provide deep context and insight into the competitive dynamics. Below you have the number of companies, facilities and facilities per company by business size and growth.

### Wood Kitchen Cabinet and Countertop Manufacturing

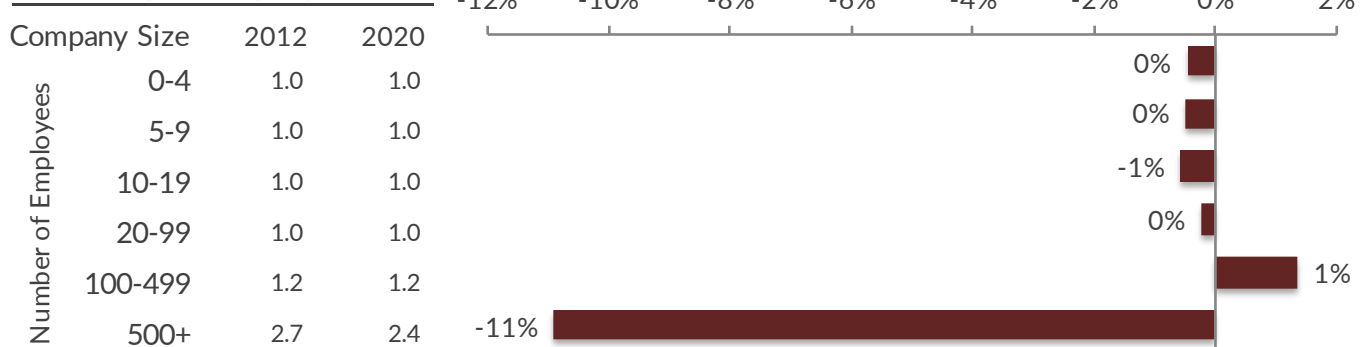
#### Number of Companies



#### Number of Facilities



#### Facilities per Company

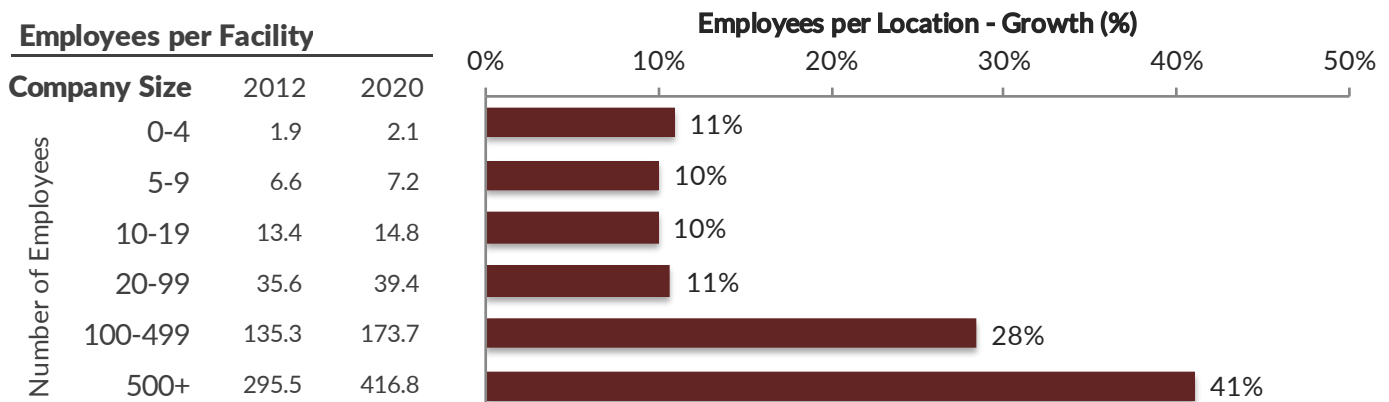
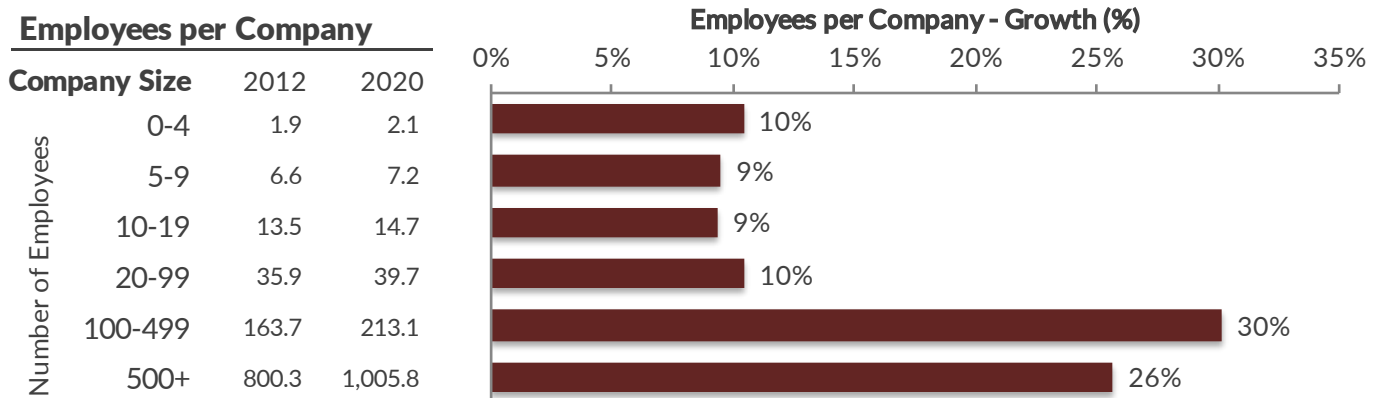
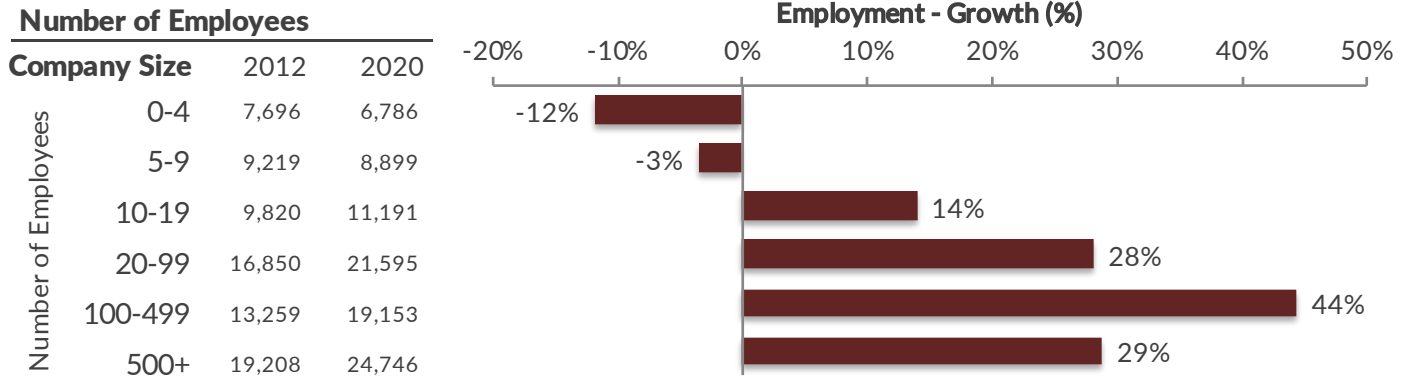




## Employment by Business Size

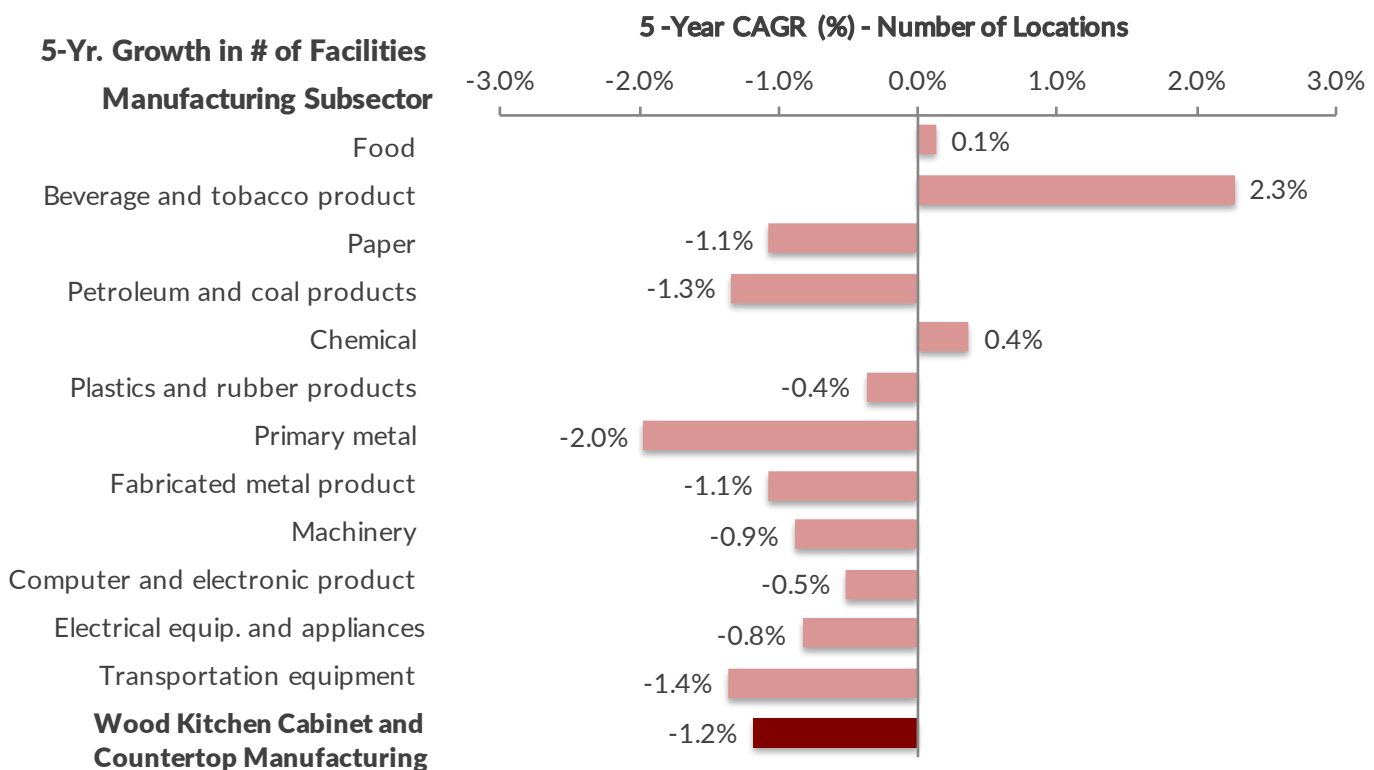
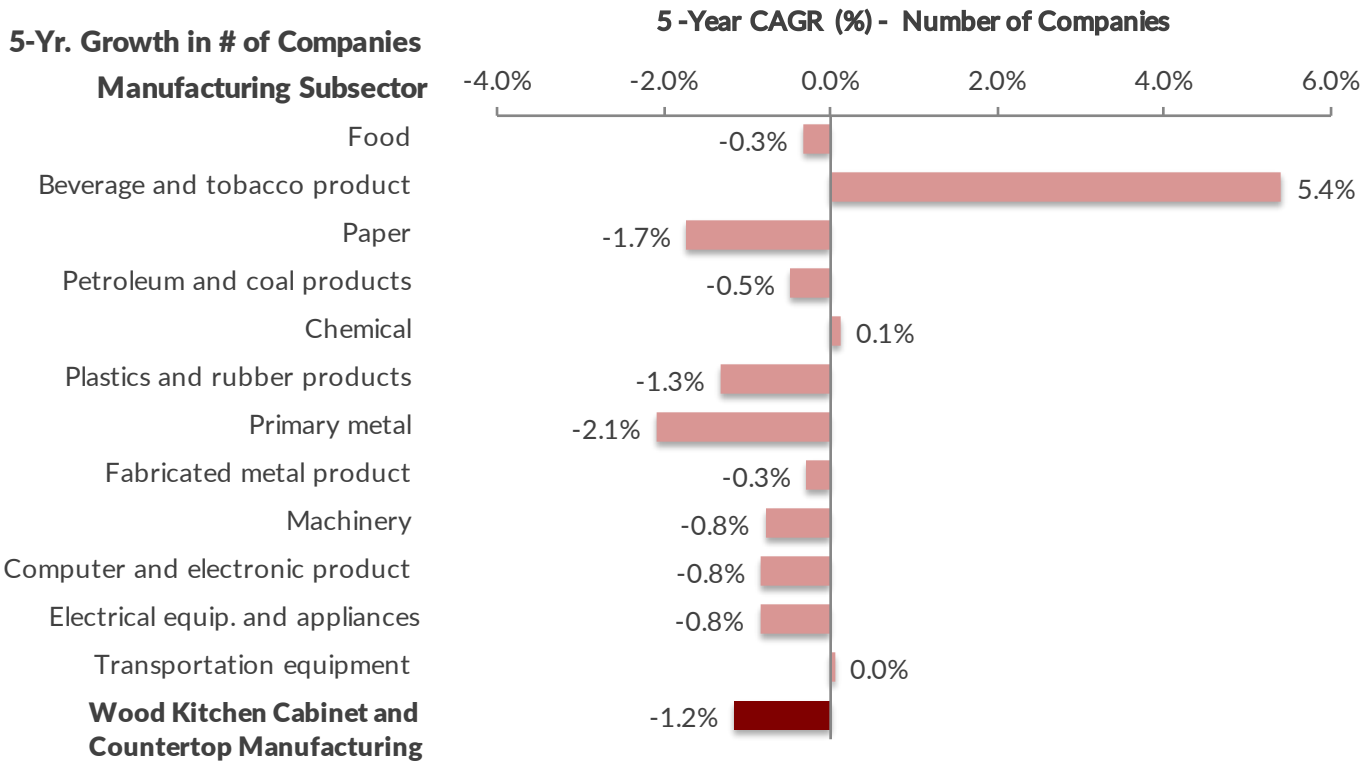
Employment dynamics by size of company highlights a deeper level of insight into what size companies are growing and shrinking. Below are metrics on employees, employees per company, and employees per facility segmented by business size with growth figures.

### Wood Kitchen Cabinet and Countertop Manufacturing



## Subsector Consolidation Analysis (1/2)

Comparing your company's growth versus the other manufacturing subsectors can provide broader strategic context. Below are the growth rates of number of companies and facilities in the major manufacturing subsectors.

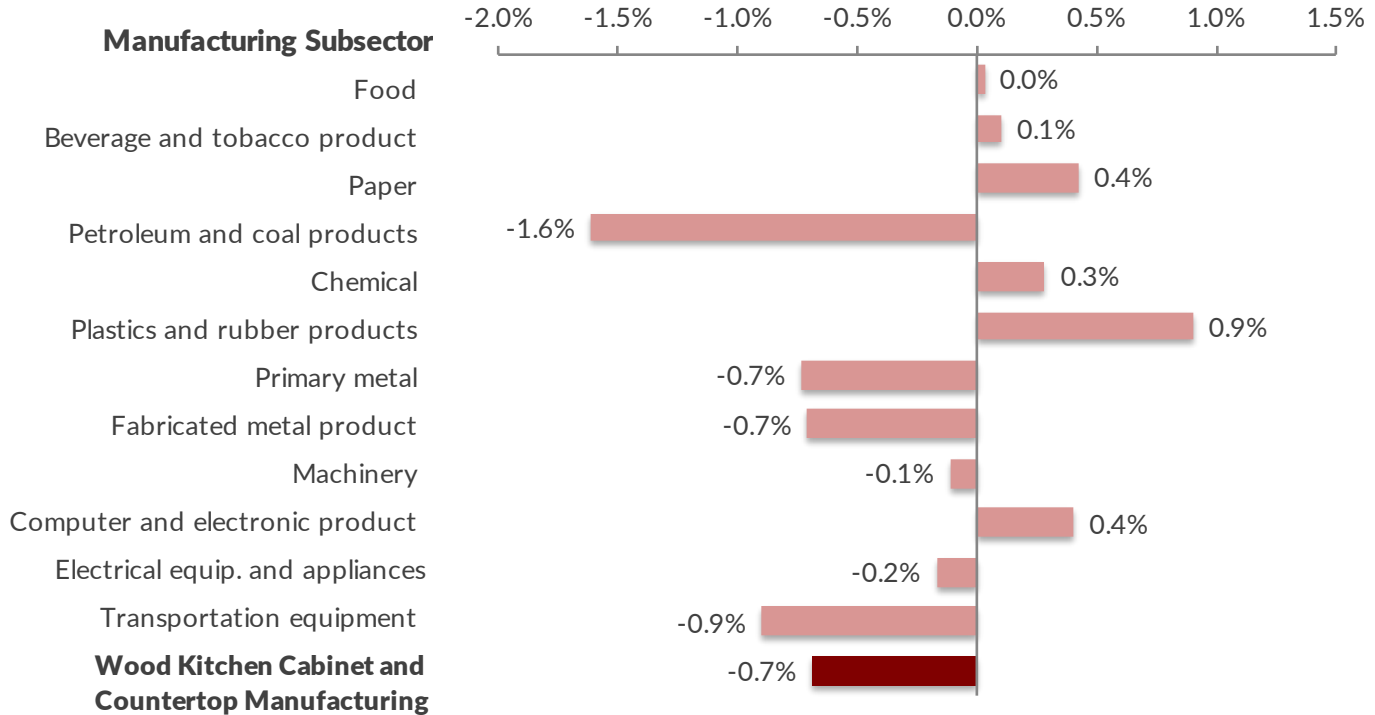


## Subsector Consolidation Analysis (2/2)

Below are the growth metrics for facilities per company and employees per company across the major manufacturing subsectors.

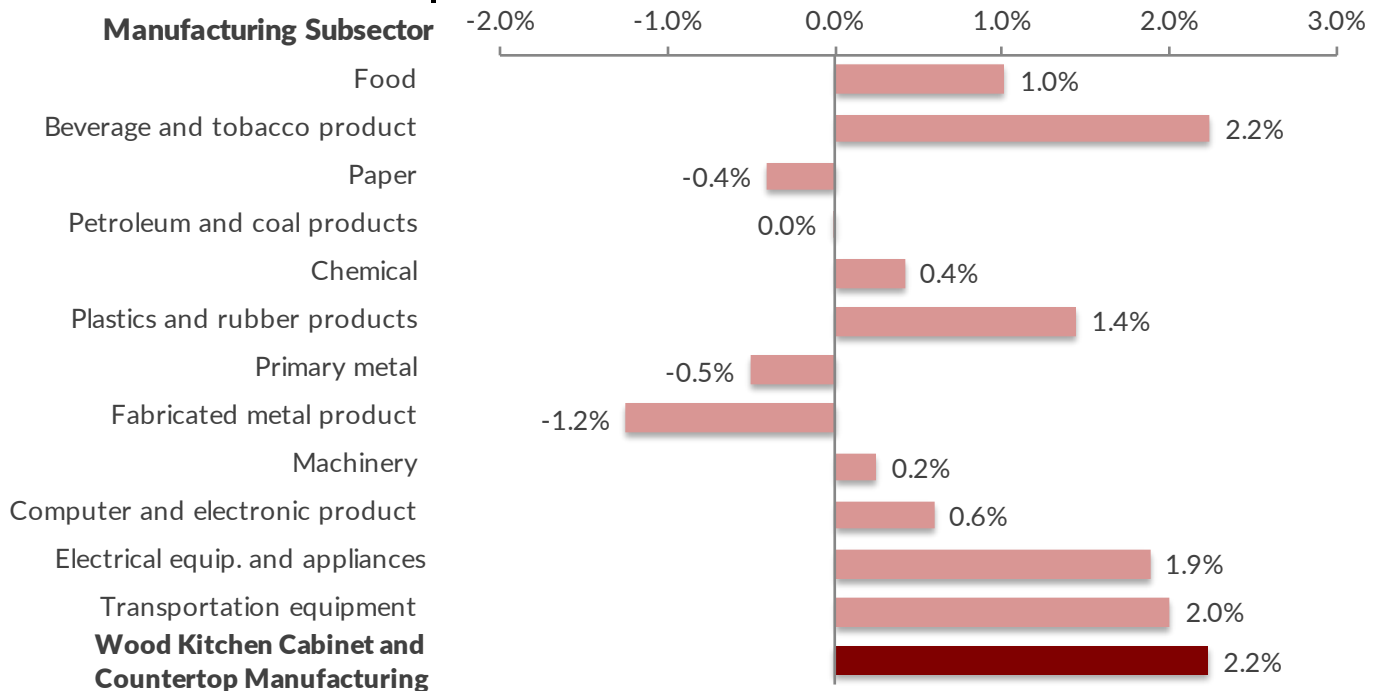
### 5-Yr. Growth - Facilities per Co.

5-Year CAGR (%) - Locations per Company



### 5-Yr. Growth - Empl. per Co.

5-Year CAGR (%) - Employees per Company Growth



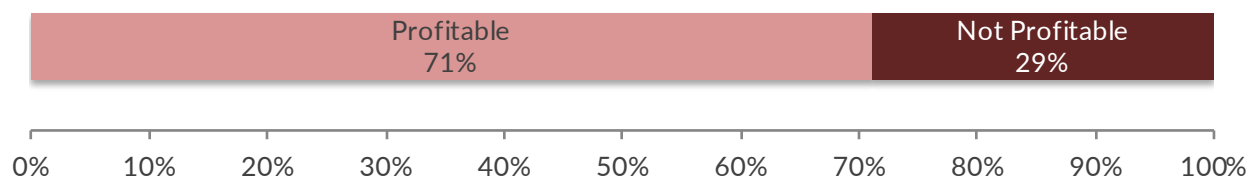
## **Section Two**

# **Costs, Capital & Profit Benchmarks**

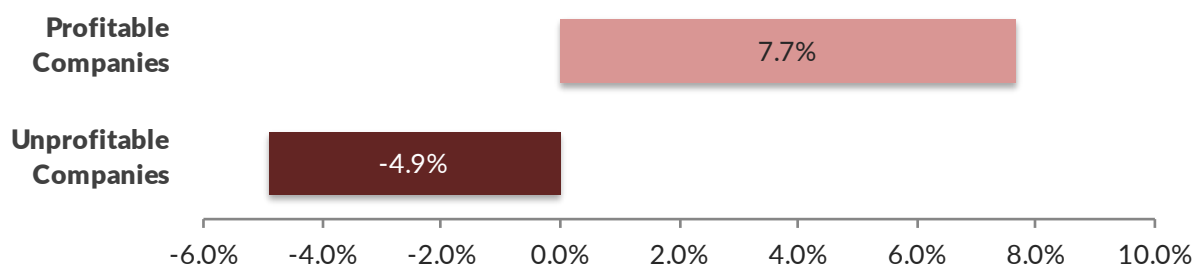
## Profitability & Financial Ratio Analysis

Below are benchmarks for the percent of companies that are profitable, average net income as a percent of revenues, and financial ratios including total asset turnover, fixed asset turnover, fixed assets to total assets ratio, total assets to total liabilities ratio, return on sales, return on total assets, return on net worth, total liabilities to net worth ratio, fixed assets to net worth ratio, and solvency ratio.

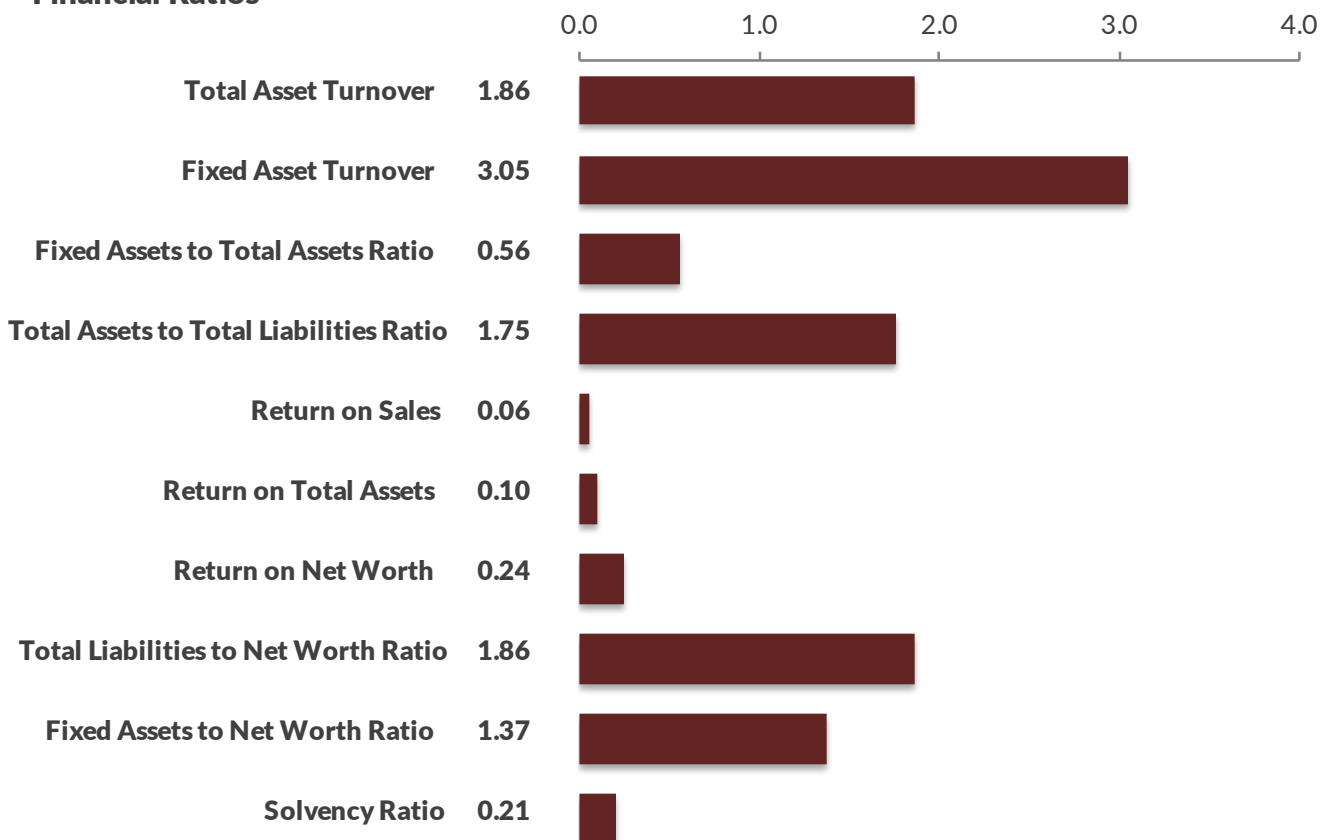
### Percent of Companies that are Profitable



### Average Net Income as a Percent of Revenues



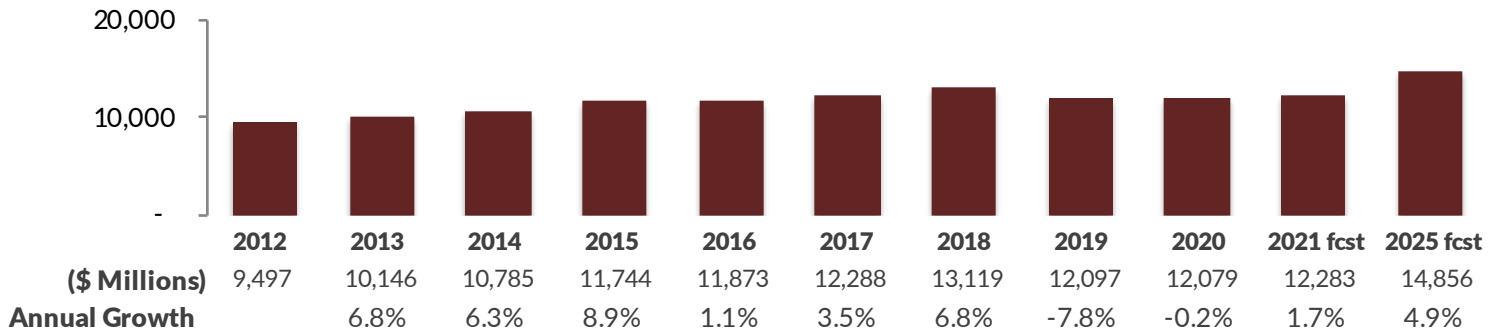
### Financial Ratios



## Operating Expenses

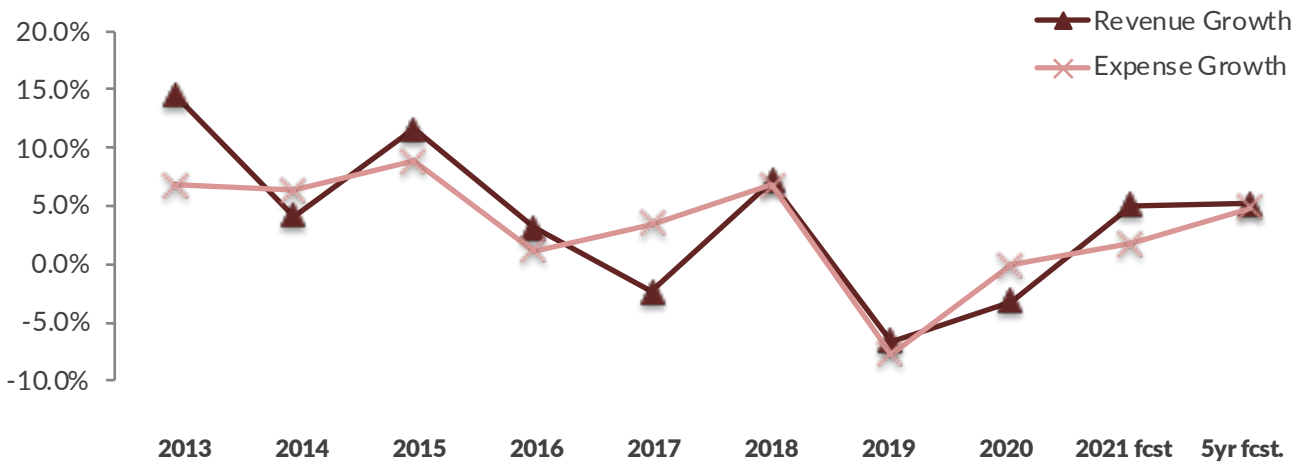
Below is total industry operating expense, industry revenue vs. industry opex growth, and opex as a percentage of revenue for Wood Kitchen Cabinet and Countertop Manufacturing. The data sets include historical and forecasts.

### Industry Operating Expenses

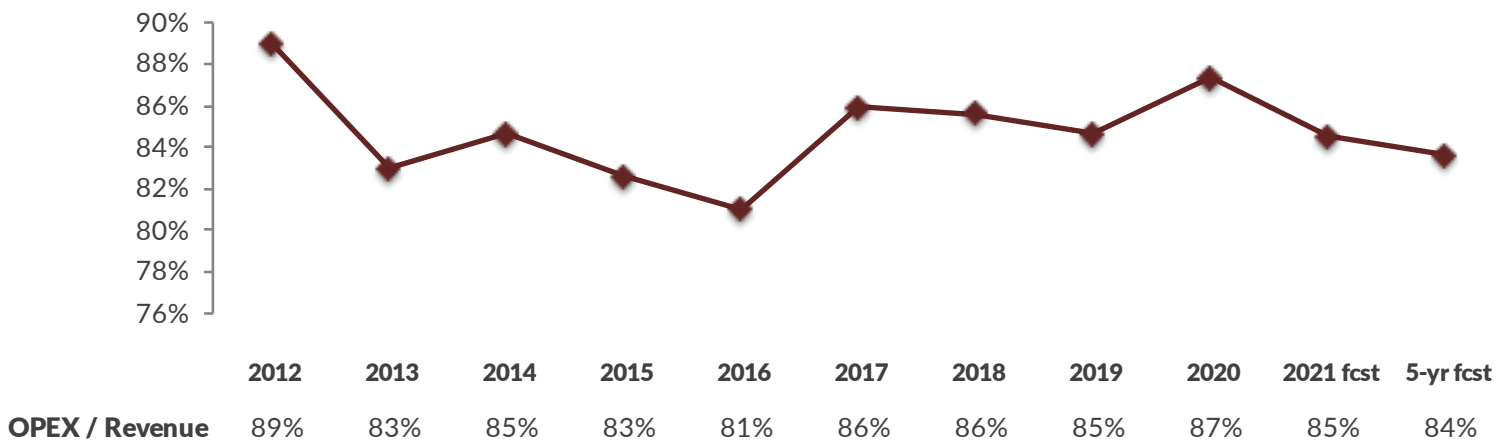


Compound Annual Growth Rate **-0.6%** 3-Year **0.6%** 5-Year

### Industry Revenue vs. Operating Expense Growth



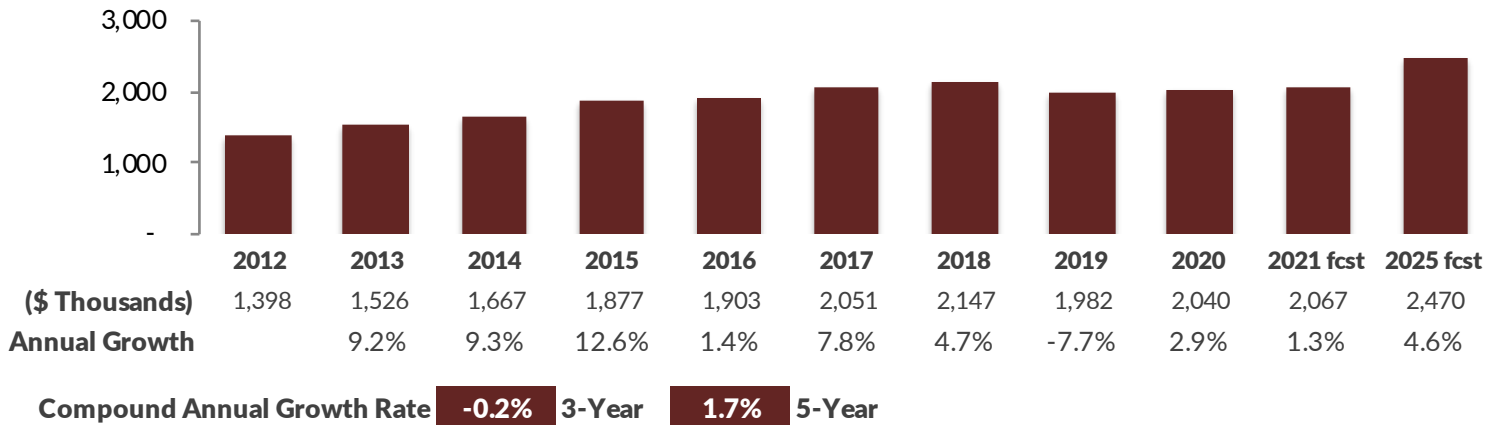
### Operating Expense as a Percent of Revenues



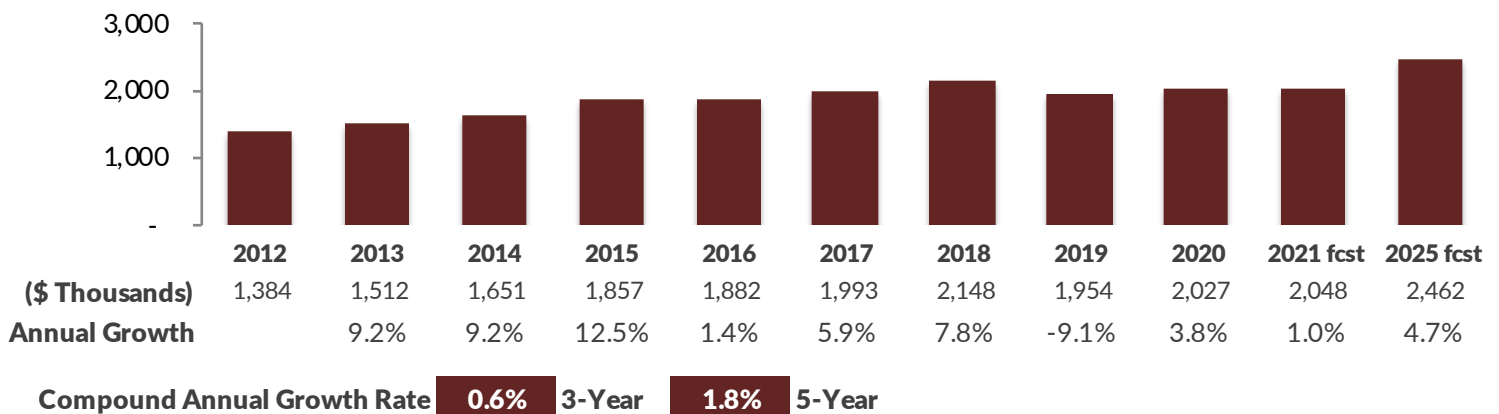
## Operating Expenses per Company & Facility

Given the dynamics of company and facility growth and consolidation in the industry, it is important to normalize operating expense growth by company and facility, which are below. This serves as a better benchmark for operating expense comparisons.

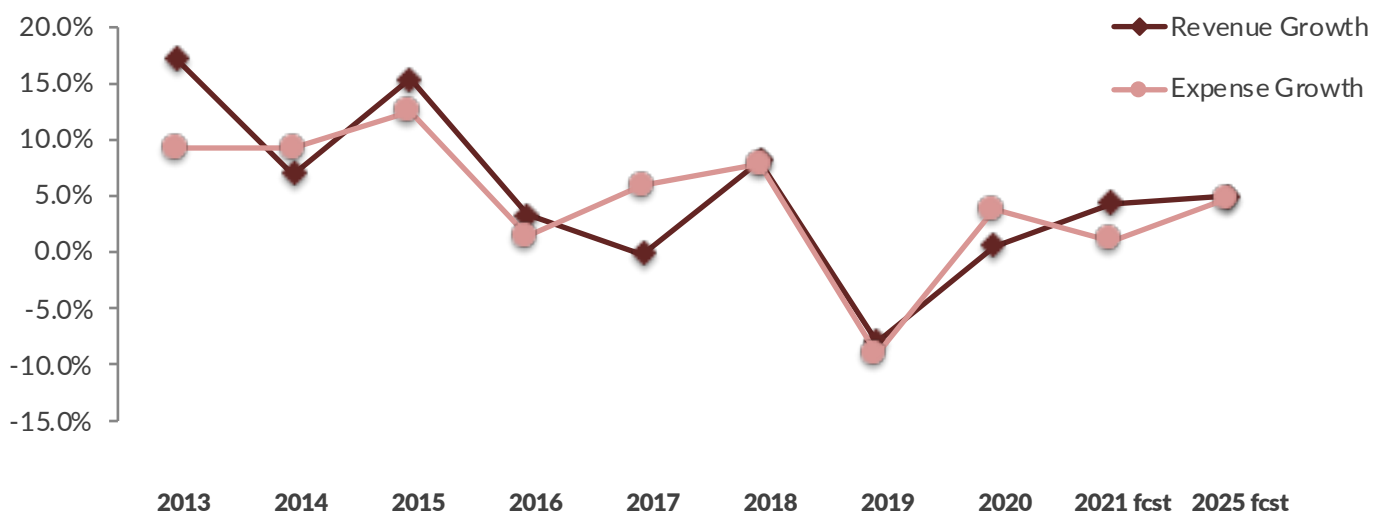
### Industry Operating Expenses per Company



### Industry Operating Expenses per Facility



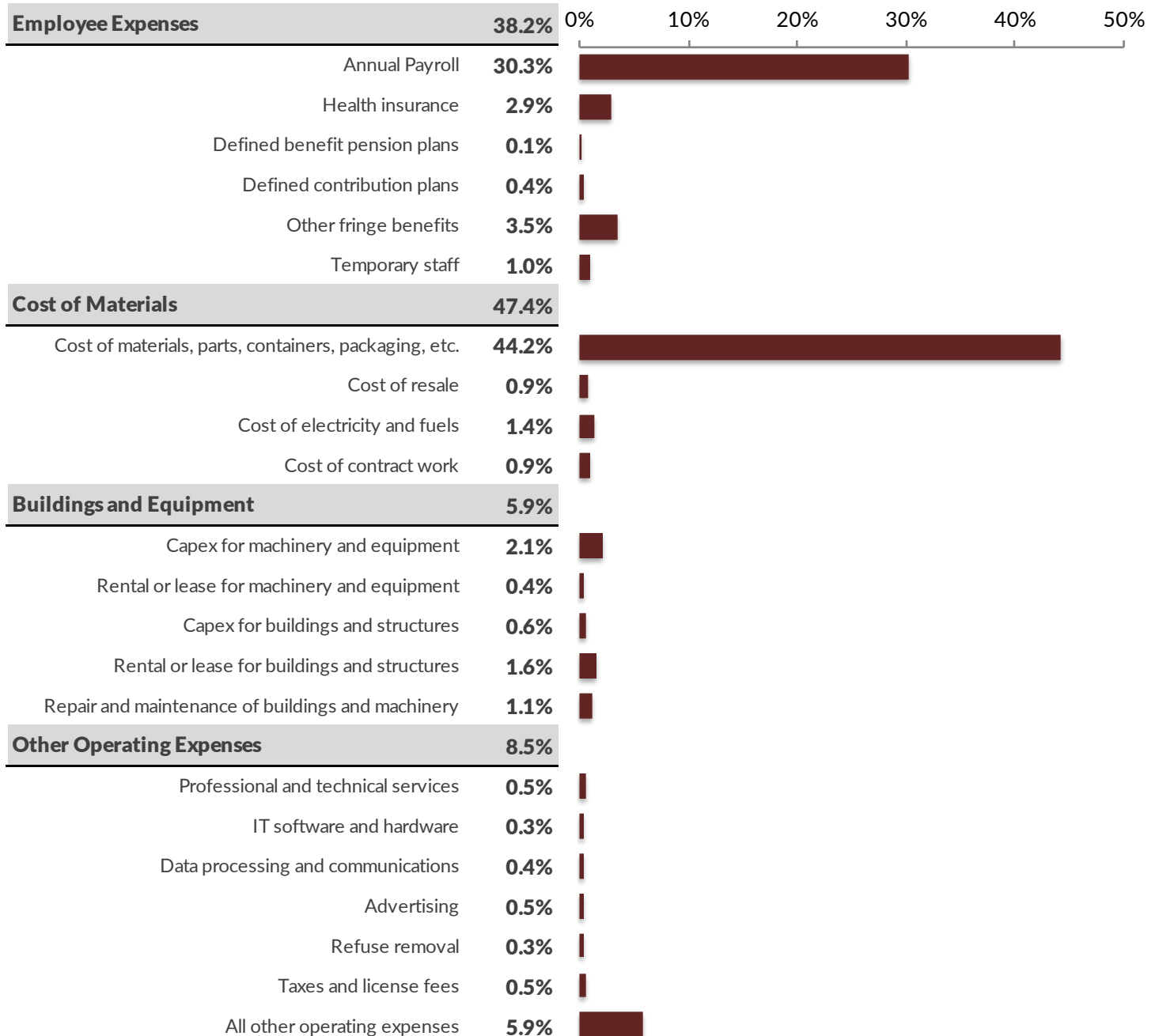
### Revenue Growth per Facility vs. Operating Expense Growth per Facility



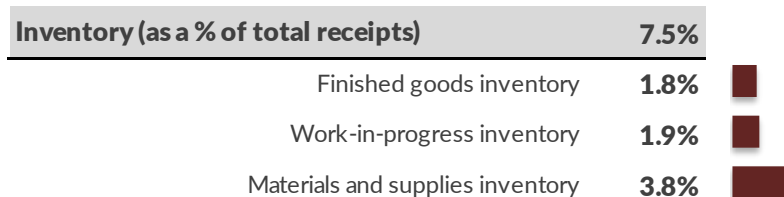
## Operating Expense Detail

Below outlines the breakdown of operating expenses, broken down by employee, property, equipment, IT, and other categories. Operating expense detail is typically used in a gap analysis to highlight opportunities where a company has variances to the benchmark expense data.

### Operating Cost Breakdown



### Inventory Breakdown

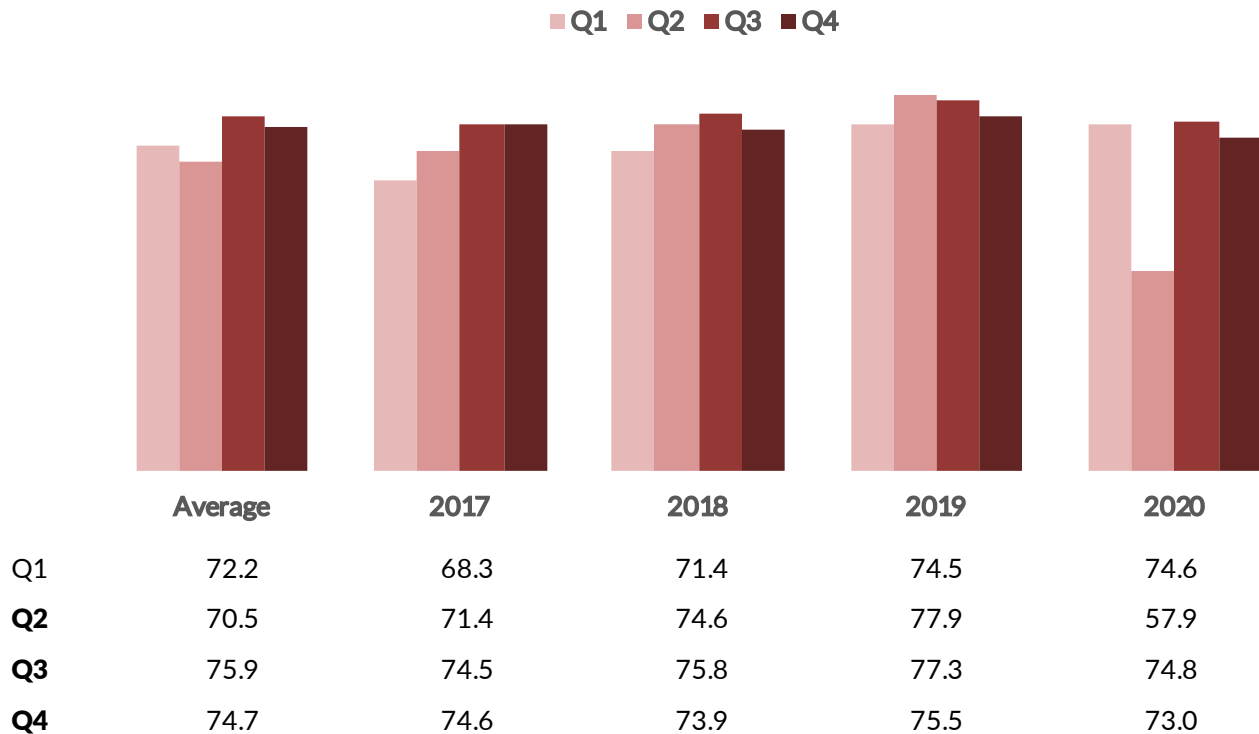




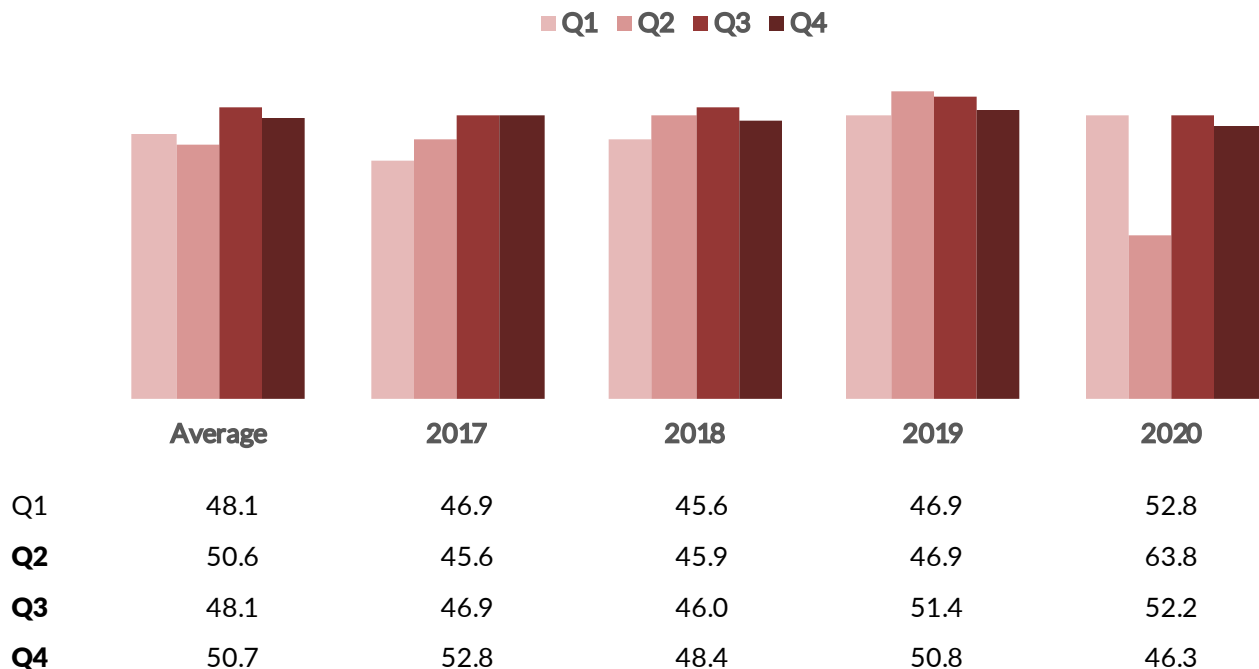
## Plant Utilization & Hours

Below is the historic plant utilization and hours by quarter from 2017-2020.

### Plant Utilization (% of Capacity)



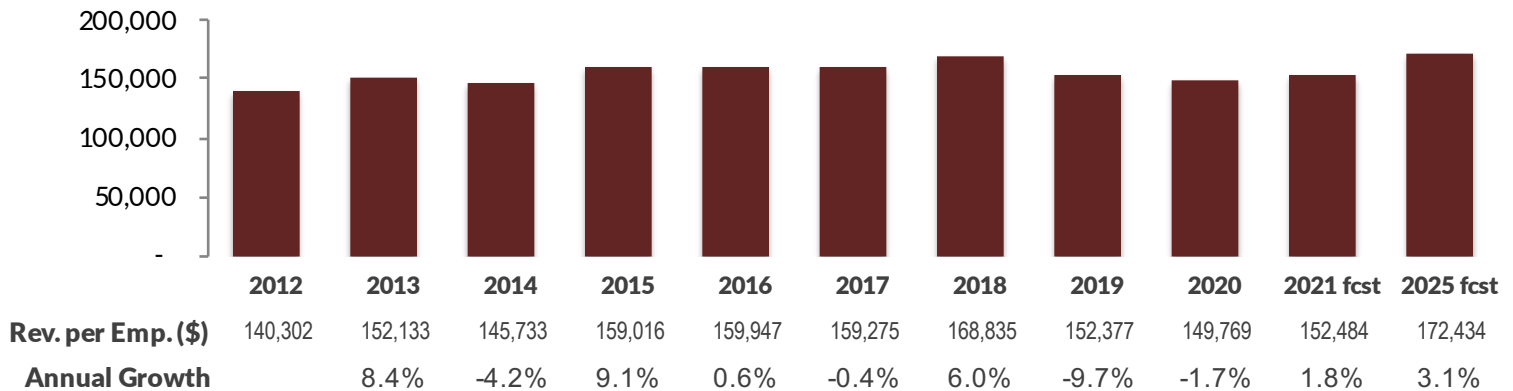
### Plant Operational Hours per Week



## Employee Productivity & Industry Employment

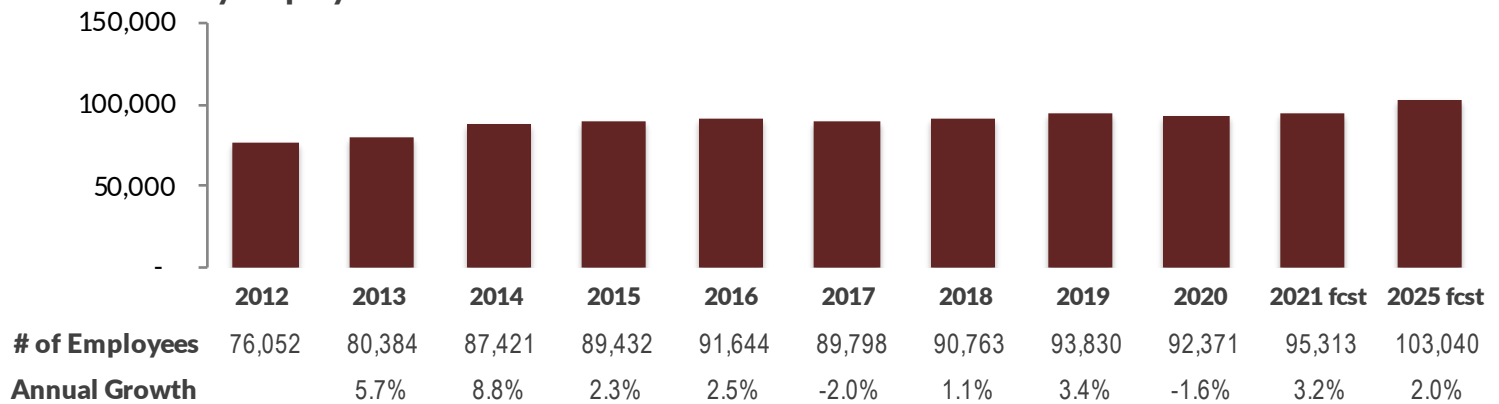
Below are data sets on productivity (revenue per employee), total industry employees, and employees per company. Each data set includes historical and forecasts.

### Productivity - Revenue (output) per Employee



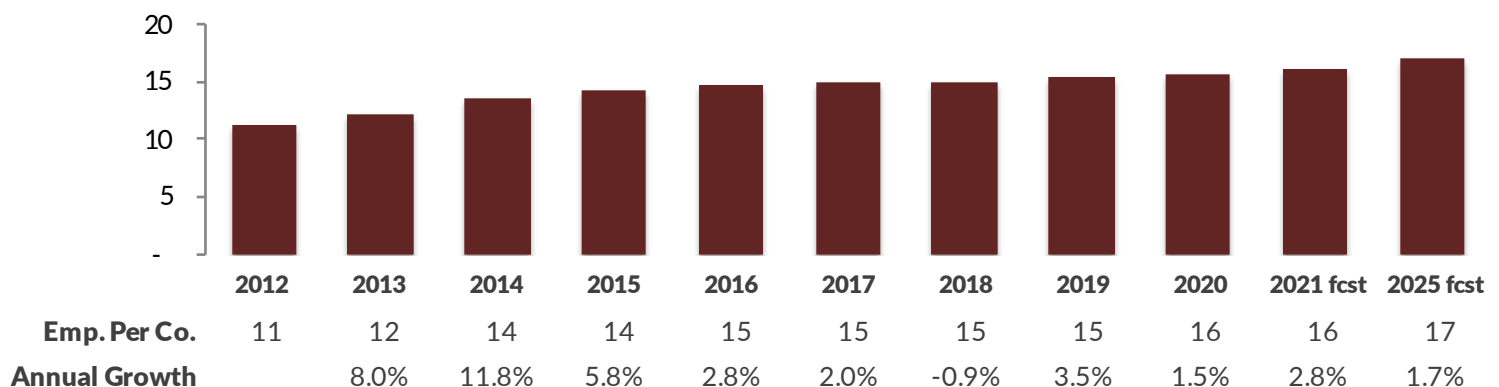
Compound Annual Growth Rate **-2.0%** 3-Year **-1.2%** 5-Year

### Total Industry Employees



Compound Annual Growth Rate **0.9%** 3-Year **0.6%** 5-Year

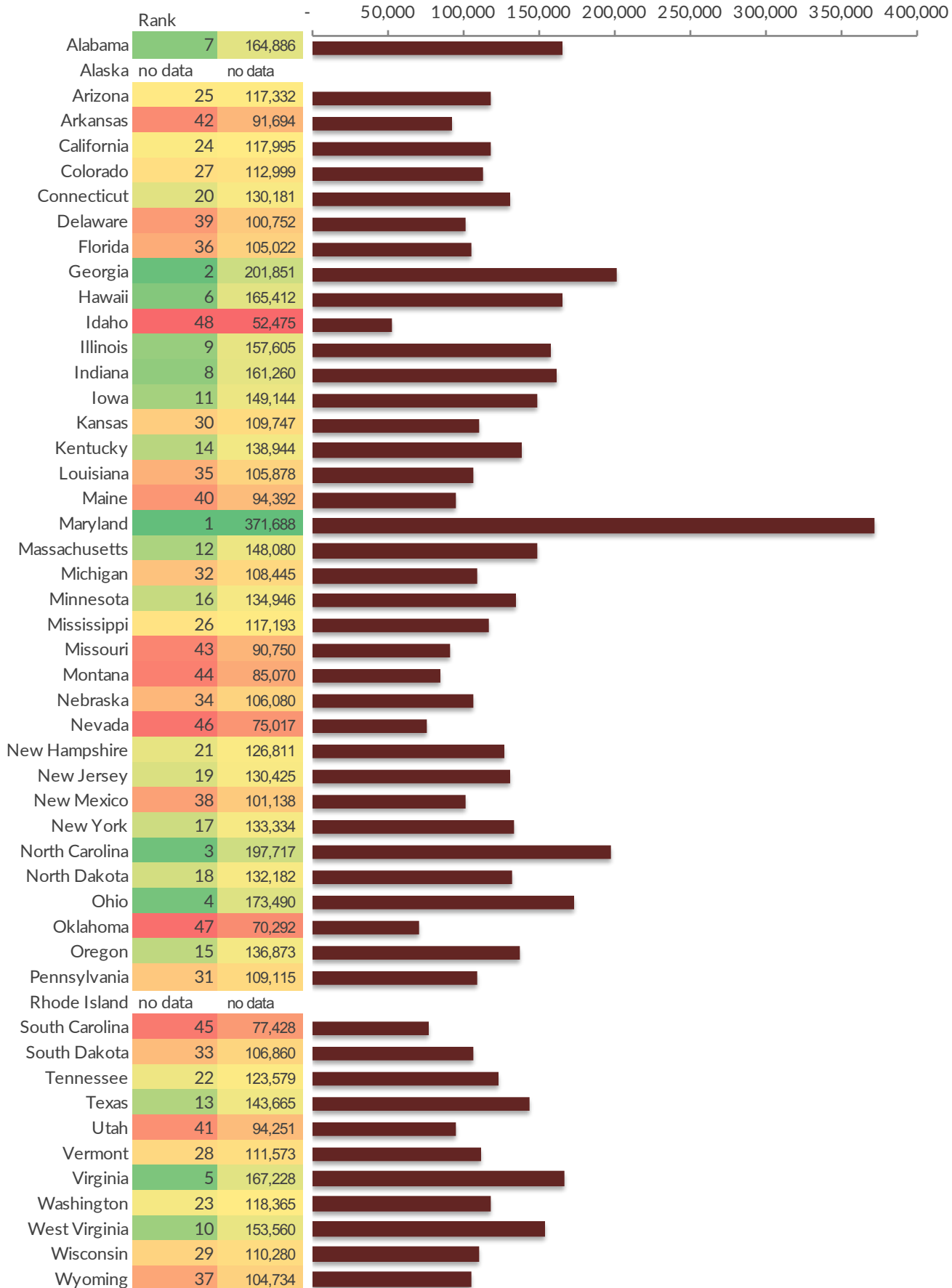
### Employees per Company



Compound Annual Growth Rate **1.3%** 3-Year **1.8%** 5-Year

## Productivity by State - Revenue (output) per Employee

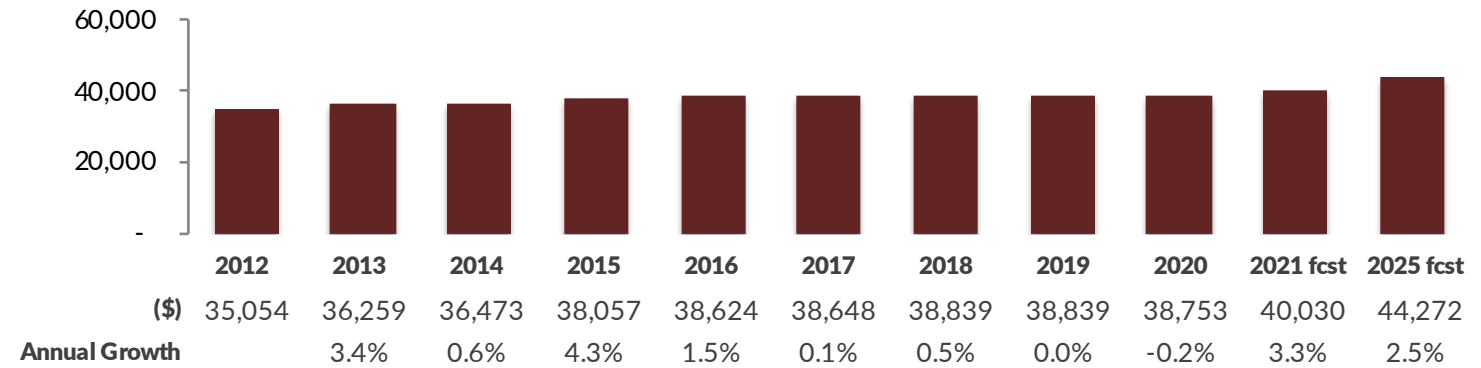
Below is productivity (total revenue divided by total number of employees) by state. When it states "no data", there wasn't a sufficient sample size of data for the state.



## Industry Payroll

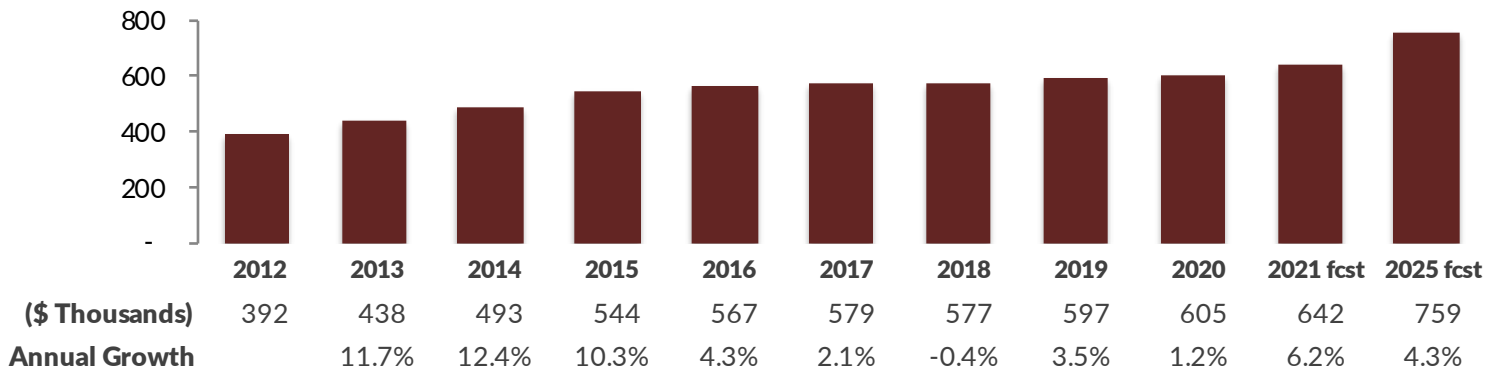
One of the consistently difficult strategic questions for every company is "are we paying our people the right amount?" In the next sections, we'll tackle this question from many different angles. The first benchmarks below cover payroll per employee, company and facility. In particular, payroll per employee is a strong metric to benchmark against, both in terms of the dollar figure but also the historical and forecasted growth.

### Payroll per Employee



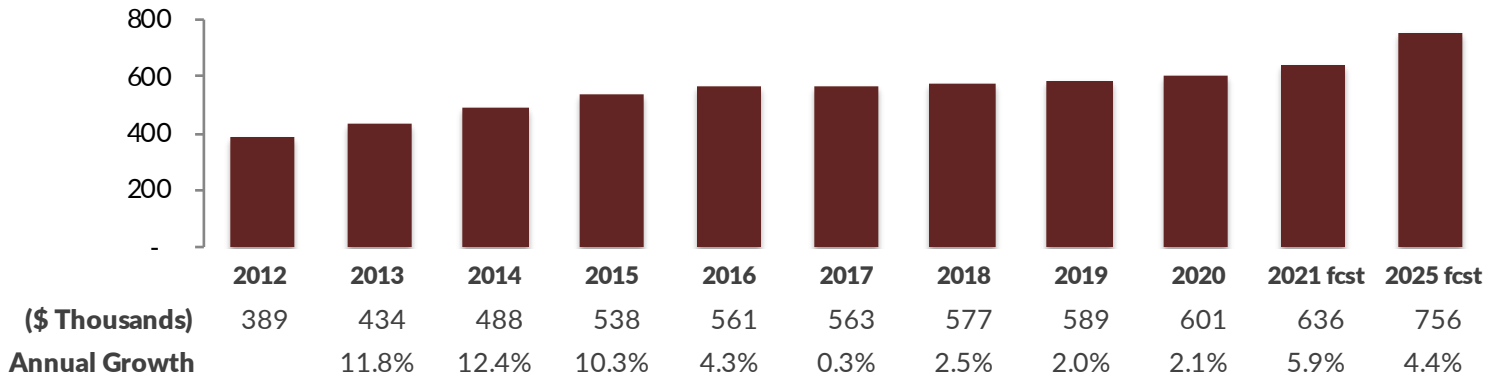
Compound Annual Growth Rate **0.1%** 3-Year **0.4%** 5-Year

### Payroll per Company



Compound Annual Growth Rate **1.4%** 3-Year **2.1%** 5-Year

### Payroll per Facility



Compound Annual Growth Rate **2.2%** 3-Year **2.2%** 5-Year

## Payroll by Business Size

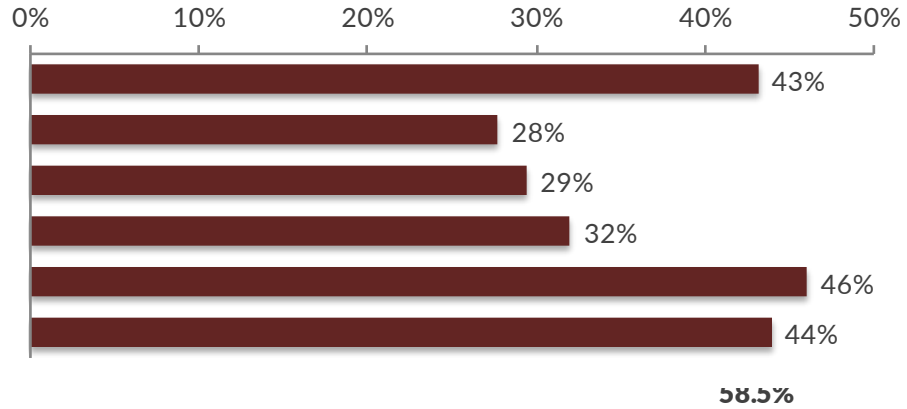
Payroll by business size metrics can create insights into how different size companies are fairing and how they pay for talent. Typically, the payroll per employee by business size (last chart) tells an interesting story about how different size companies compensate their talent.

### Wood Kitchen Cabinet and Countertop Manufacturing

#### Payroll per Company (\$000s)

Company Size	2012	2020
0-4	54	77
5-9	207	264
10-19	457	592
20-99	1,333	1,759
100-499	5,980	8,732
500+	29,620	42,620

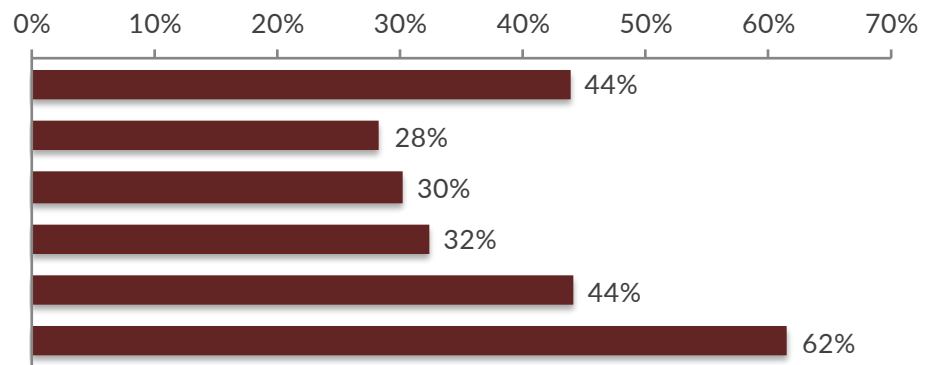
#### Payroll per Company - 8-Year Growth (%)



#### Payroll per Facility (\$000s)

Company Size	2012	2020
0-4	54	78
5-9	207	265
10-19	456	594
20-99	1,322	1,749
100-499	4,943	7,120
500+	10,937	17,664

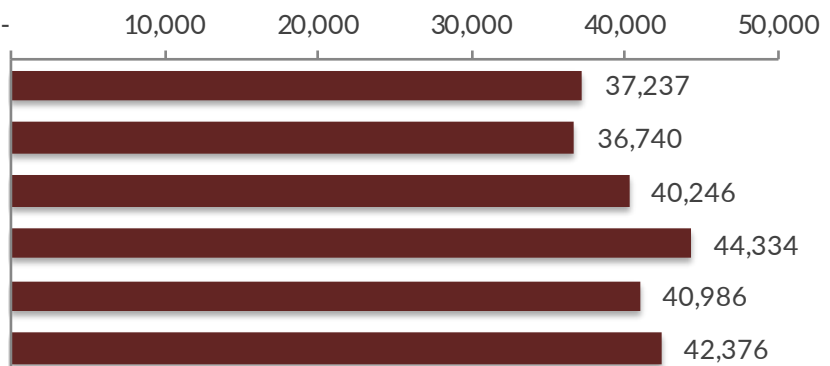
#### Payroll per Location - 8-Year Growth (%)



#### Payroll per Employee (\$)

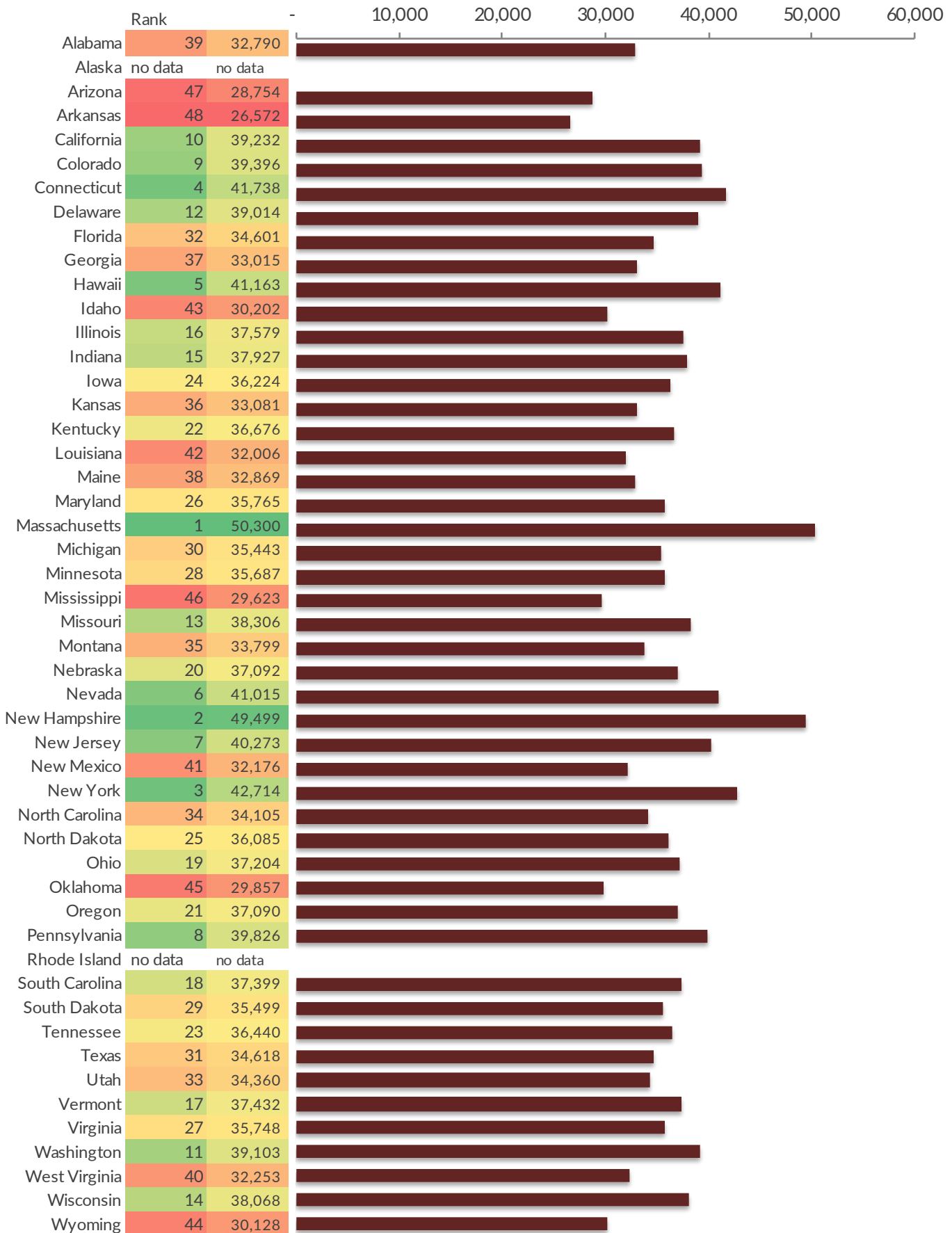
Company Size	2012	2020	Growth
0-4	28,731	37,237	30%
5-9	31,500	36,740	17%
10-19	34,006	40,246	18%
20-99	37,102	44,334	19%
100-499	36,535	40,986	12%
500+	37,010	42,376	14%

#### 2020 Payroll per Employee



## Payroll per Employee by State

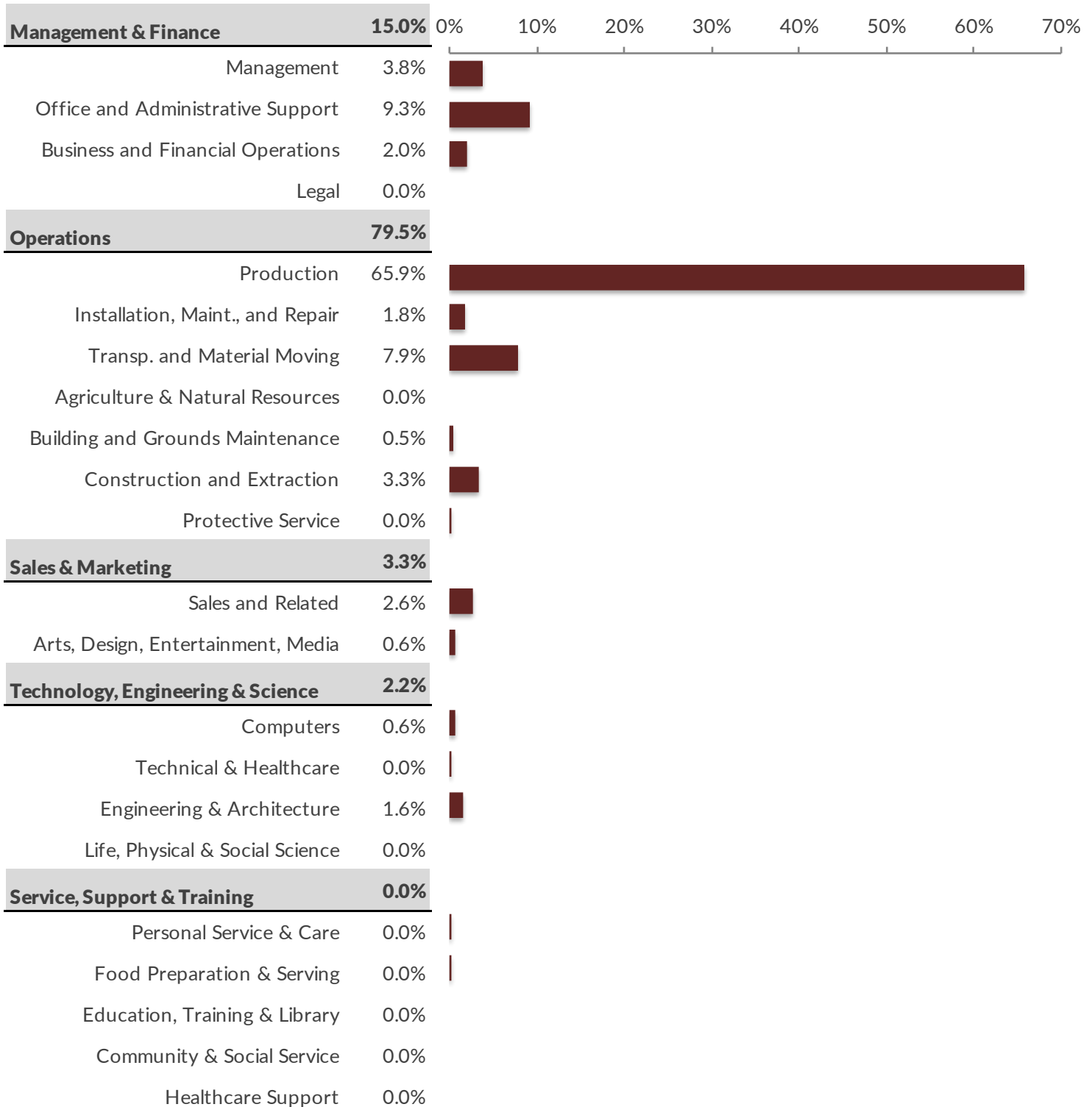
The competition for talent is local, with the supply and demand dynamics of each state driving compensation. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



## Job Categorization Benchmarks

There isn't detailed job categorization data on the Wood Kitchen Cabinet and Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Wood Kitchen Cabinet and Countertop Manufacturing industry is part of. Ensuring your company has the right people in the right roles, is just as important as having the right number of people and the proper compensation. Pay particular attention to management ratios, and the five higher-level categories.

### Job Categories as a % of Total Employees



## Job Categorization Pay Ranges

There isn't detailed job categorization data on the Wood Kitchen Cabinet and Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Wood Kitchen Cabinet and Countertop Manufacturing industry is part of. Below are the pay ranges of the high-level job categories. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are

### Furniture and Kitchen Cabinet Manufacturing

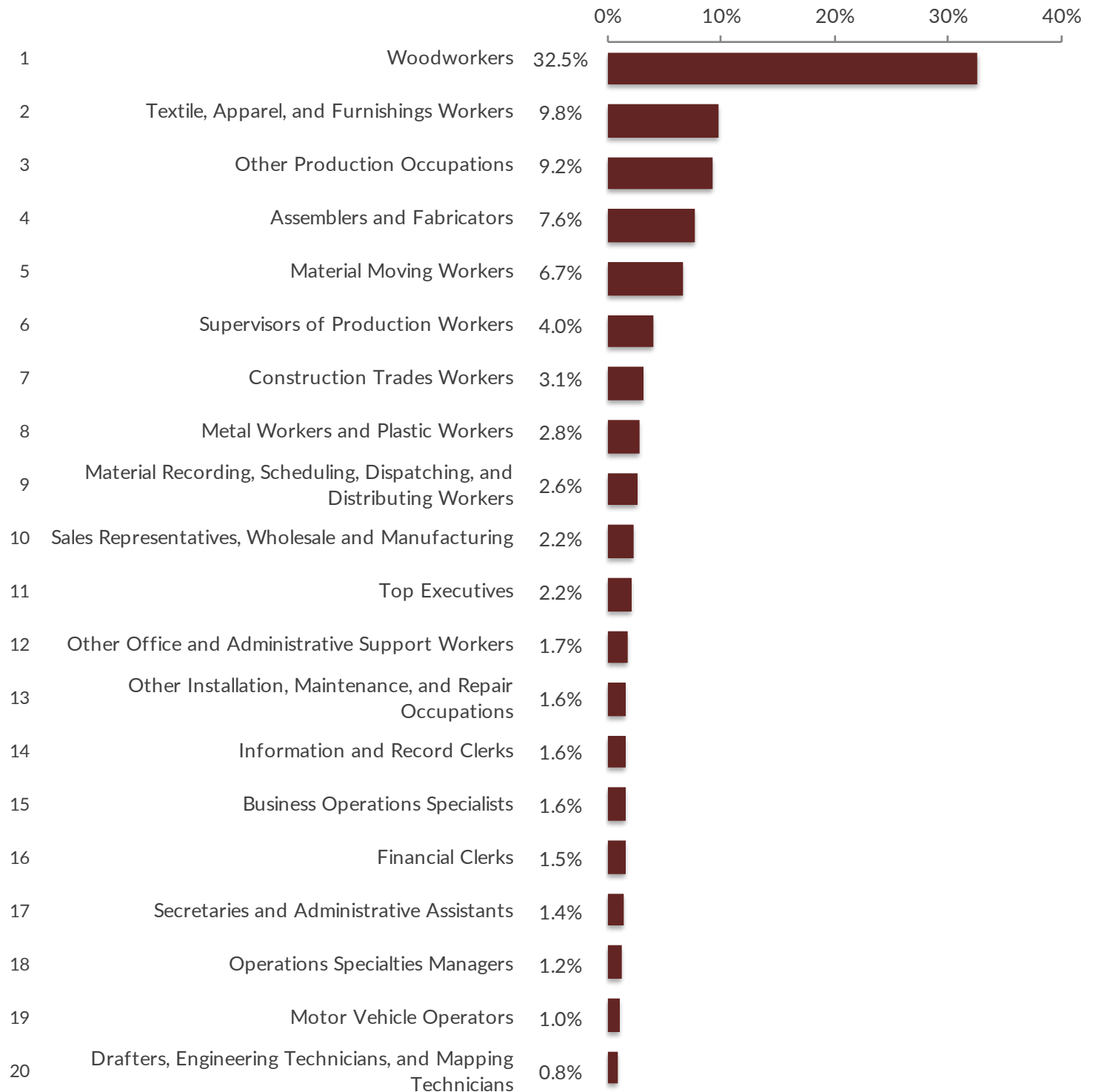
Industry Pay Ranges		Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
<b>Management &amp; Finance</b>						
	Management	\$21.69	\$29.25	\$48.78	\$59.03	\$87.28
	Office and Administrative Support	\$9.88	\$12.36	\$16.64	\$19.39	\$25.01
	Business and Financial Operations	\$15.97	\$19.88	\$26.97	\$32.04	\$40.58
	Legal	#	#	#	#	#
<b>Operations</b>						
	Production	\$9.63	\$11.58	\$15.63	\$18.33	\$23.31
	Installation, Maint., and Repair	\$12.49	\$15.64	\$20.01	\$23.47	\$28.88
	Transportation and Material Moving	\$9.11	\$10.60	\$13.61	\$15.59	\$18.69
	Agriculture & Natural Resources	#	#	#	#	#
	Building and Grounds Maintenance	\$8.34	\$9.28	\$11.82	\$13.71	\$16.75
	Construction and Extraction	\$10.59	\$13.13	\$18.51	\$22.26	\$28.99
	Protective Service	\$7.96	\$8.85	\$11.80	\$14.91	\$17.51
<b>Sales &amp; Marketing</b>						
	Sales and Related	\$11.45	\$16.58	\$28.26	\$33.94	\$47.82
	Arts, Design, Entertainment, Media	\$12.06	\$16.31	\$23.31	\$28.23	\$35.92
<b>Technology, Engineering &amp; Science</b>						
	Information Technology	\$15.83	\$20.20	\$28.72	\$35.76	\$45.76
	Technical & Healthcare	\$16.88	\$20.88	\$28.23	\$35.60	\$42.94
	Engineering & Architecture	\$15.97	\$19.98	\$26.99	\$32.79	\$40.36
	Life, Physical & Social Science	#	#	#	#	#
<b>Service, Support &amp; Training</b>						
	Personal Service & Care	\$7.77	\$8.44	\$10.19	\$11.59	\$13.97
	Food Preparation & Serving	\$7.85	\$8.47	\$13.15	\$14.20	\$25.49
	Education, Training & Library	#	#	#	#	#
	Community & Social Service	#	#	#	#	#
	Healthcare Support	#	#	#	#	#



## Top 20 Industry Jobs -Percent of Employment

There isn't detailed job categorization data on the Wood Kitchen Cabinet and Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Wood Kitchen Cabinet and Countertop Manufacturing industry is part of. The below metrics go into the details of the industry's top jobs ranked by percent of total employment.

### Top Jobs - Percent of Total Employment



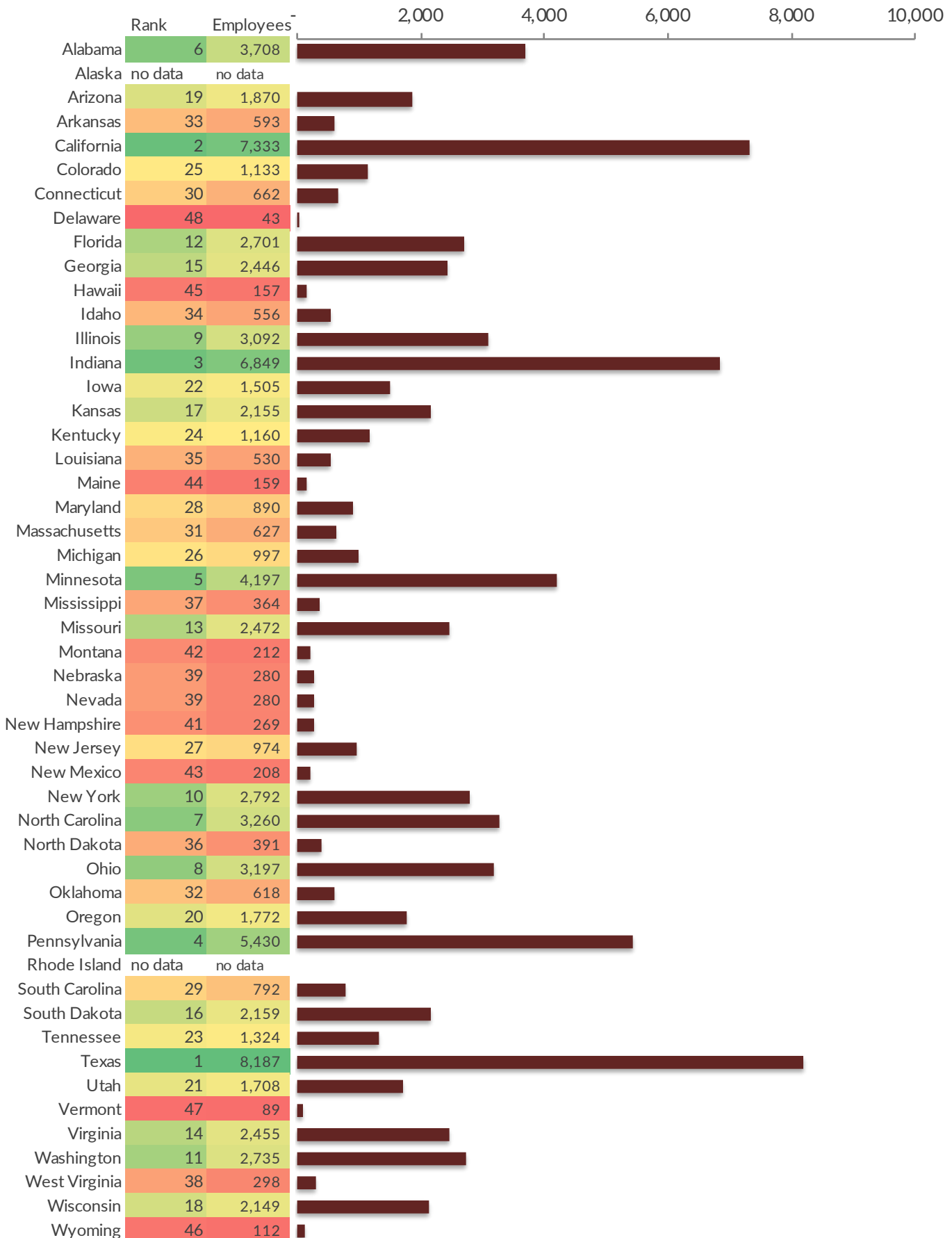
## Top 20 Jobs - Pay Bands

There isn't detailed job categorization data on the Wood Kitchen Cabinet and Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Wood Kitchen Cabinet and Countertop Manufacturing industry is part of. Below are the details of the wage bands for the industry's top jobs. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are left blank.

Top Detailed Jobs - Pay Bands		Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
1	Woodworkers	\$9.84	\$11.94	\$15.49	\$18.25	\$22.64
2	Textile, Apparel, and Furnishings Workers	\$9.51	\$11.51	\$15.65	\$18.62	\$23.43
3	Other Production Occupations	\$9.37	\$10.67	\$13.83	\$16.21	\$19.26
4	Assemblers and Fabricators	\$9.61	\$11.20	\$14.46	\$17.01	\$20.92
5	Material Moving Workers	\$9.07	\$10.47	\$13.07	\$15.04	\$18.00
6	Supervisors of Production Workers	\$15.83	\$19.22	\$25.31	\$30.07	\$36.96
7	Construction Trades Workers	\$10.91	\$13.47	\$18.78	\$22.49	\$29.15
8	Metal Workers and Plastic Workers	\$9.99	\$12.43	\$16.41	\$19.15	\$23.72
9	Material Recording, Scheduling, Dispatching, and Distributing Workers	\$9.96	\$11.90	\$15.85	\$18.40	\$23.62
10	Sales Representatives, Wholesale and Manufacturing	\$12.62	\$17.69	\$29.43	\$34.78	\$48.95
11	Top Executives	\$20.35	\$28.52	\$52.53	\$65.48	#
12	Other Office and Administrative Support Workers	\$9.18	\$11.10	\$15.35	\$18.24	\$23.61
13	Other Installation, Maintenance, and Repair Occupations	\$12.43	\$15.56	\$19.35	\$22.92	\$27.49
14	Information and Record Clerks	\$10.73	\$13.16	\$16.76	\$19.25	\$23.90
15	Business Operations Specialists	\$15.84	\$19.61	\$26.53	\$31.21	\$39.35
16	Financial Clerks	\$11.42	\$13.86	\$17.87	\$21.12	\$25.21
17	Secretaries and Administrative Assistants	\$9.78	\$12.29	\$16.66	\$19.88	\$24.82
18	Operations Specialties Managers	\$23.24	\$29.93	\$42.21	\$49.93	\$66.74
19	Motor Vehicle Operators	\$10.22	\$12.47	\$16.19	\$18.70	\$23.44
20	Drafters, Engineering Technicians, and Mapping Technicians	\$14.69	\$17.86	\$22.68	\$26.87	\$32.11

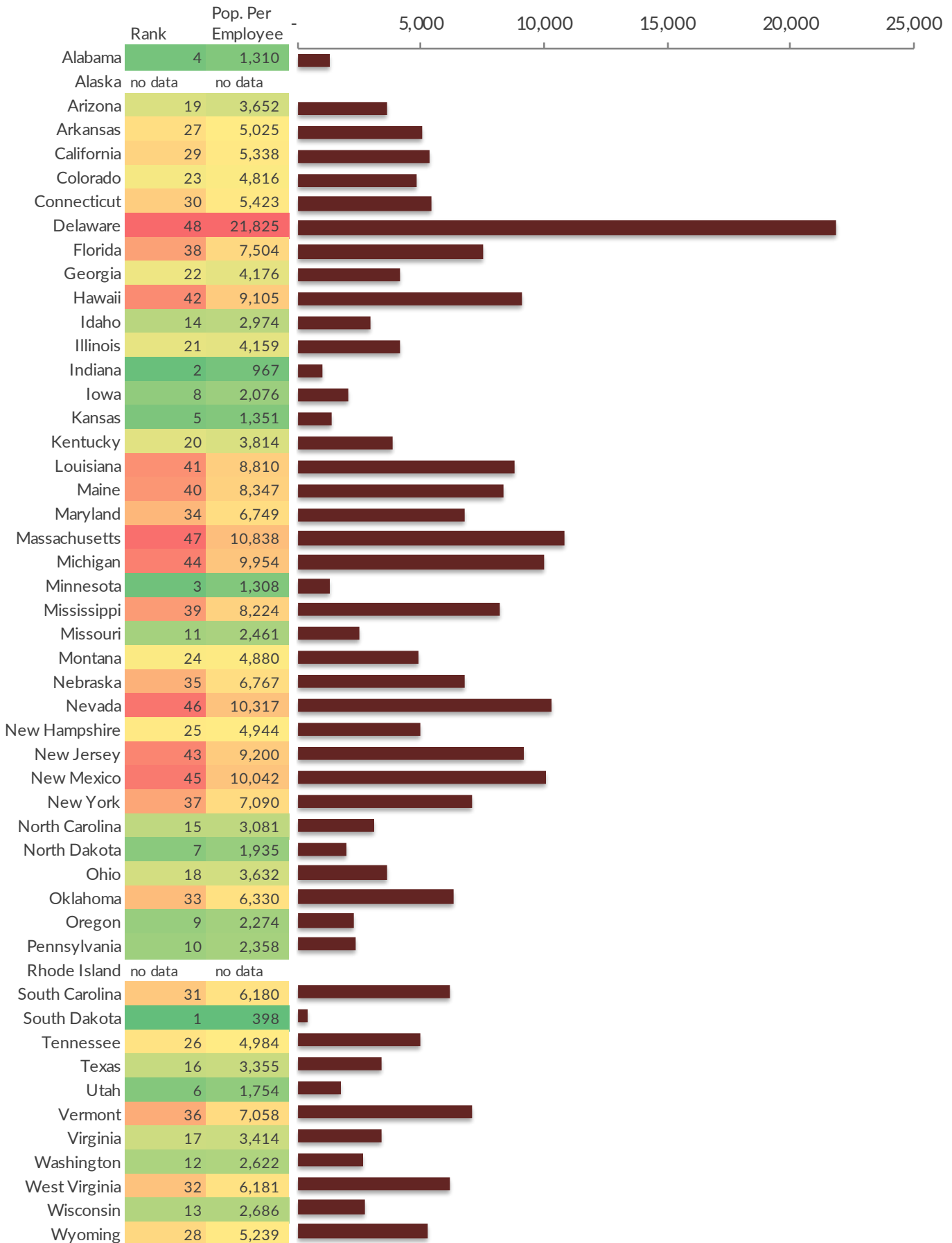
## Total Employees by State

It is always good to know how large the industry talent pool is in a state. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



## State Population to Every Industry Employee

Below is one of the more entertaining metrics, which is simply how many people in a state there are per each industry employee. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



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