

# Kentley Insights

## 2026 Market Report

### Kitchen Cabinet & Countertop Manufacturing

September 2026

Report: 33711

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## Report Methodology & Sources

Kentley Insights is the leader in data-driven industry market research reports. This report includes extensive data sets and forecasts on Kitchen Cabinet & 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 Kitchen Cabinet & Countertop Manufacturing industry. Our analysts create the industry forecasts utilizing historical trends, industry dynamics, econometrics, and macroeconomic trends. Data sources include the Bureau of Labor, the Census Bureau, the IRS, the Bureau of Economic Analysis, the Federal Reserve, and the Department of Commerce.

## Industry Definition

### Kitchen Cabinet & Countertop Manufacturing

Kitchen Cabinet & Countertop Manufacturing produces storage units and work surfaces for residential and commercial kitchen and bathroom applications. Companies design and build cabinetry and surface products with appropriate functionality, moisture resistance, and aesthetic characteristics for specific installation environments. Manufacturing processes include panel cutting, component machining, assembly, finishing, hardware installation, and quality verification through inspection and functional testing. These businesses create essential components for residential and commercial interiors. The industry continuously enhances manufacturing precision, finish quality, hardware functionality, and increasingly focuses on specialized storage solutions, moisture-resistant materials, and modular designs while developing improved installation systems and customization options that meet evolving consumer preferences.

## Market Commentary

The \$18.1 billion kitchen cabinet and countertop manufacturing industry produces storage units and work surfaces for residential and commercial food preparation environments. Competitive structure encompasses large production cabinet manufacturers alongside custom shops addressing premium market segments. Market demands increasingly emphasize design aesthetics complementing interior environments, storage efficiency maximizing functionality, durable finishes ensuring appearance longevity, and increasingly specialized material options addressing particular design preferences. Manufacturers face challenges balancing design variety supporting diverse aesthetic preferences, material selection optimizing appearance and durability, manufacturing efficiency, and significant tariff considerations affecting both wood inputs and component hardware. Industry leaders differentiate through innovative storage solutions enhancing functionality, quality construction ensuring durability, design versatility addressing aesthetic preferences, and increasingly digital design integration supporting visualization and specification in a sector where product aesthetics and construction quality drive customer selection decisions.

## Industry Snapshot - Revenue & Growth

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

### Overall Industry Size

The overall 2025 revenues of the Kitchen Cabinet & Countertop Manufacturing was \$18.4 billion. The industry is about average in industry size, ranking in the top 60% of manufacturing industries.

### Overall Industry Growth

Over the past 3 years, industry revenues have been growing at an annual rate of 0.5% per year. This growth rate lags the average for manufacturing industries and ranks it in the bottom 40% of all manufacturing industries.

### Overall Industry Growth Forecast

Given the macroeconomic climate and industry dynamics, the forecasted industry revenue growth rate for the next 5 years is 2.7% per year for the Kitchen Cabinet & Countertop Manufacturing industry.

### Revenue per Company

In 2025, the average revenue per company for the industry was approximately \$3.0 million, which grew at a 0.7% annual rate over the past 3 years.

### Product Line Concentration

For Kitchen Cabinet & Countertop Manufacturing, the top product line make up 77% of revenue, which ranks in the top 60% of manufacturing industries for product line concentration.

### Producer Pricing Index

In 2025, PPI for the industry was 1.5%. While over the past 5 years, PPI has averaged 3.9% per year.

### Industry Revenue as a Percent of State Manufacturing

For Kitchen Cabinet & Countertop Manufacturing, South Dakota has the highest industry revenue as a % of state manufacturing at 2.1%. This is 495% higher than the average of 0.4% per state.

### Sales per Facility

For the industry, South Dakota has the highest sales per facility at \$10.3 million, which is 242% higher than the U.S. average of \$3.0 million in sales per facility.

## Industry Snapshot - Costs, Capital & Profit

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

### Operating Expenses

In 2025, the operating expenses as a percent of revenue for Kitchen Cabinet & Countertop Manufacturing was 87.9%, and over the past 3 years total operating expenses for the industry grew at 0.8% per year.

### Operating Expense Breakdown

The breakdown of operating expenses for the industry is as follows: 36.9% for employee expenses, 49.7% for cost of materials, 4.7% for capital, building, and machinery expenses, and 8.7% for other expenses.

### State Population per Industry Employee

South Dakota ranks #1 in employment density within the industry, with 1 out of every 433 people in the state in the industry.

### Employee Productivity

In 2025, the sales per employee grew 1.2% to \$194,956, which ranks the industry in the bottom 20% of manufacturing industries.

### Payroll per Employee

In 2025, payroll per employee equaled \$49,452 for the industry, which ranks it in the top 20% of manufacturing industries. Payroll per employee has grown at an annual rate of 4% over the past 3 years.

### Payroll by State

New Hampshire is the highest paying state, with a payroll per employee of \$66,946, which is 40% higher than the U.S. average.

### Job Categorization

The jobs breakdown for Kitchen Cabinet & 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.

### Profitability

71.1% of companies in the industry are profitable, with an average net income of 10.7% of revenues, which ranks the industry in the bottom 20% of manufacturing industries.

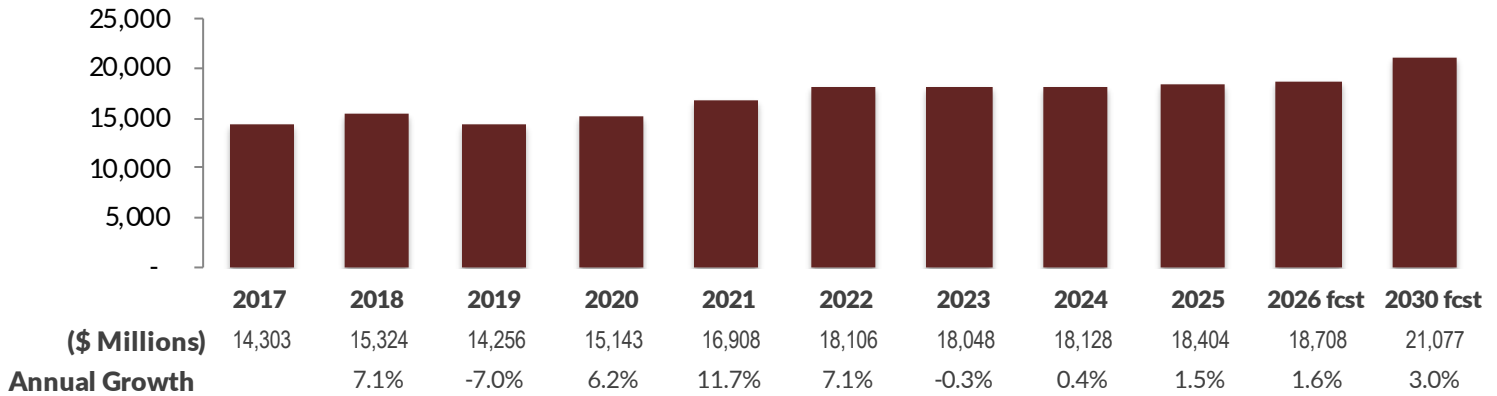
# **Section One**

## **Revenue & Growth Benchmarks**

## Industry Growth Details

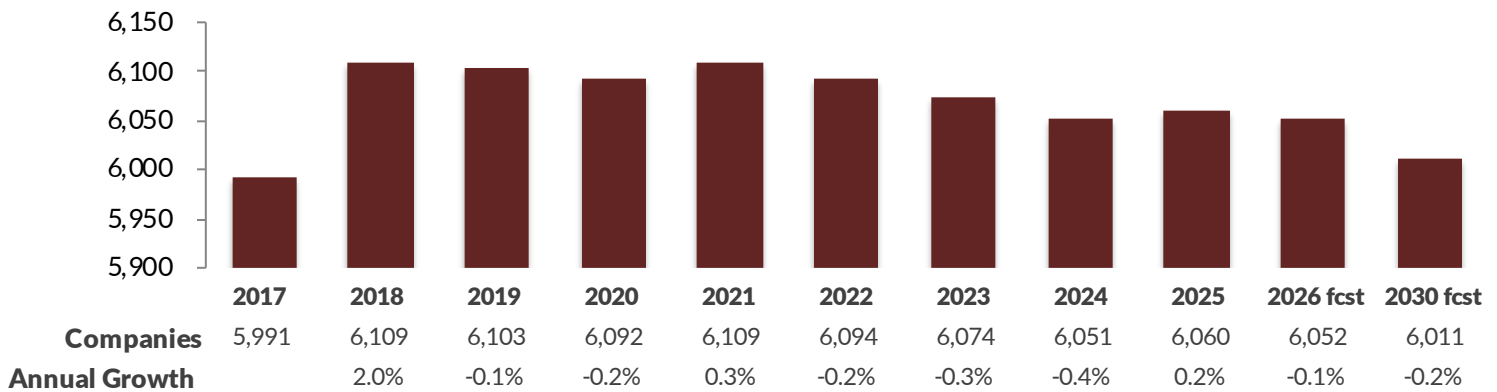
To get a macro level view of Kitchen Cabinet & Countertop Manufacturing, below are the historical details and industry growth forecasts for total industry revenues, number of companies, and number of facilities. The current revenue forecasts are based on tariff impacts, staple vs. discretionary dynamics and the related price elasticity, ability to pass through cost increases, and other macroeconomic factors.

### Industry Revenue (\$ Millions)



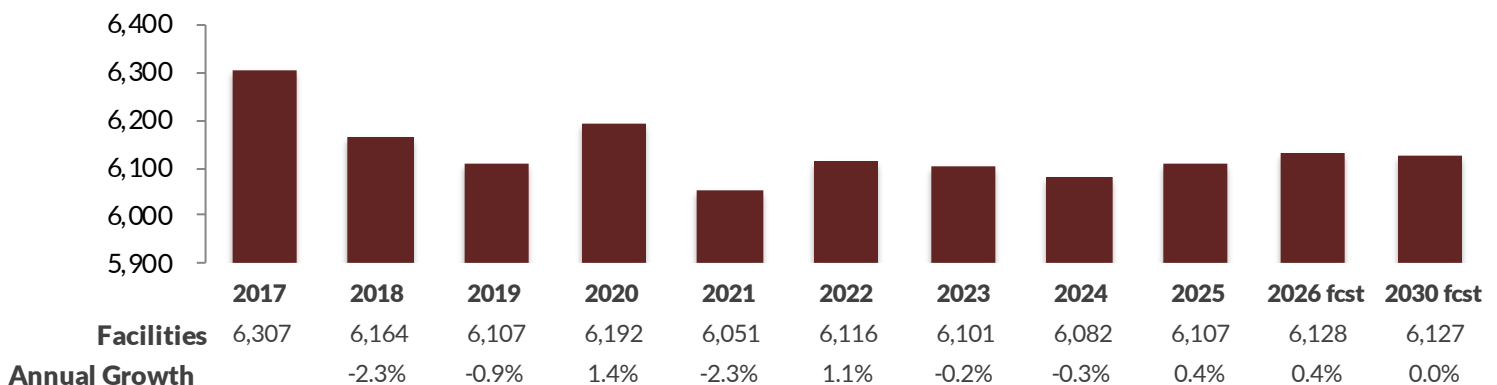
Compound Annual Growth Rate **0.5%** 3-Year **4.0%** 5-Year

### Number of Companies



Compound Annual Growth Rate **-0.2%** 3-Year **-0.1%** 5-Year

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

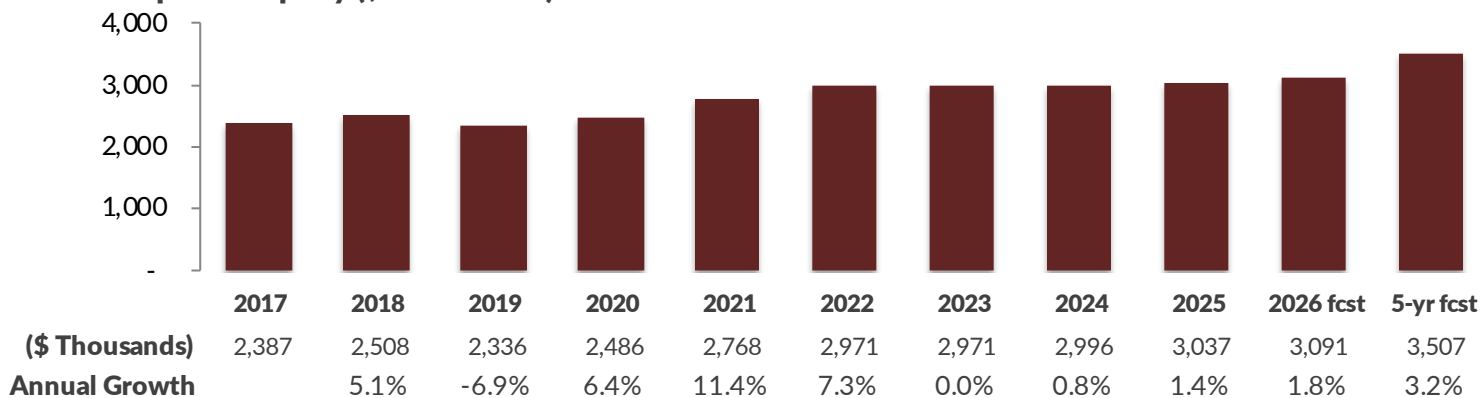


Compound Annual Growth Rate **0.0%** 3-Year **-0.3%** 5-Year

## Growth Benchmarks

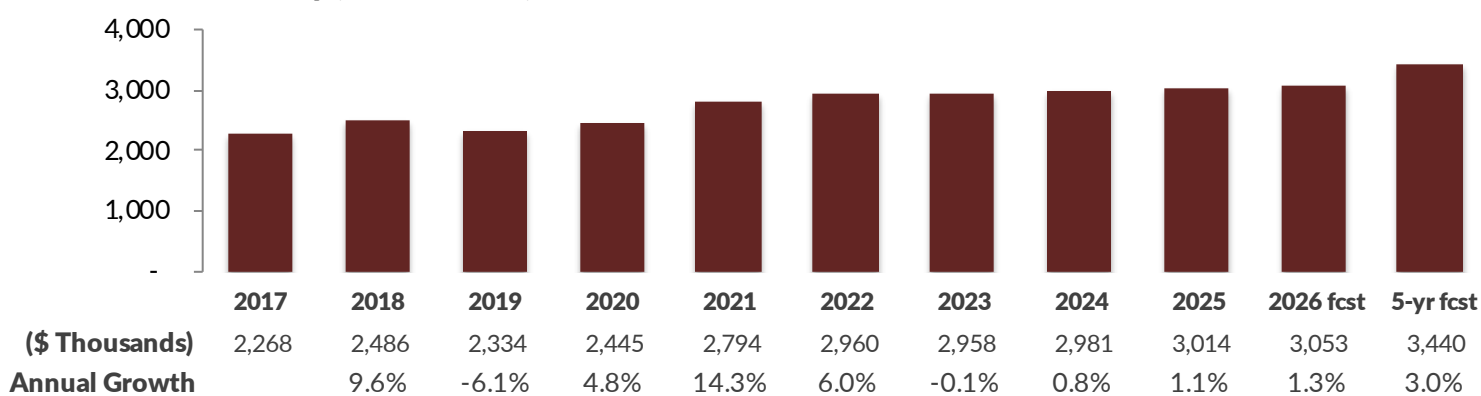
Below are the normalized growth benchmarks for Kitchen Cabinet & Countertop Manufacturing, including revenue per company, revenue per facility, and facilities per company. These metrics are typically better to use to benchmark a company's performance, since they normalize for company and facility growth.

### Revenue per Company (\$ Thousands)



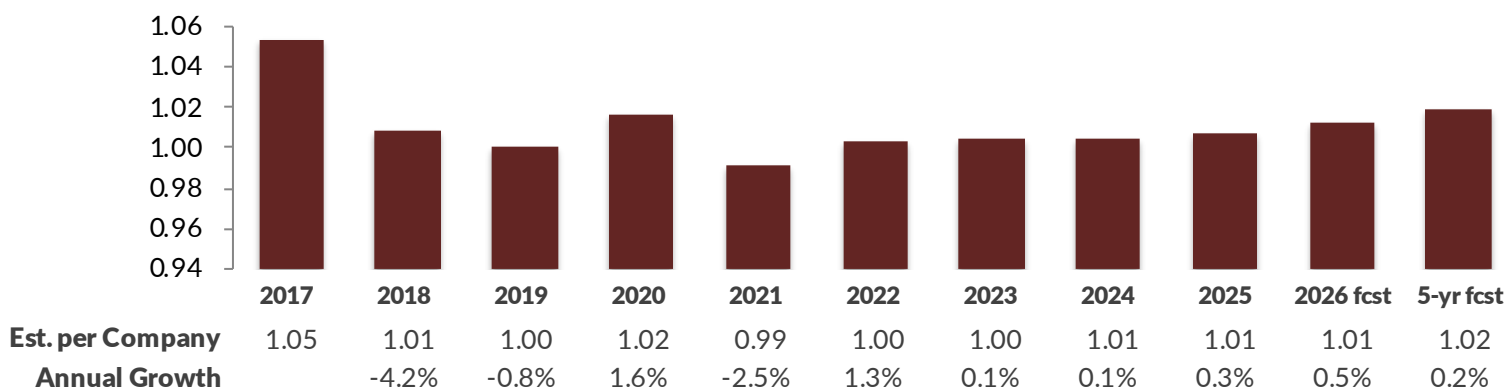
Compound Annual Growth Rate **0.7%** 3-Year **4.1%** 5-Year

### Revenue Per Facility (\$ Thousands)



Compound Annual Growth Rate **0.6%** 3-Year **4.3%** 5-Year

### Facilities per Company

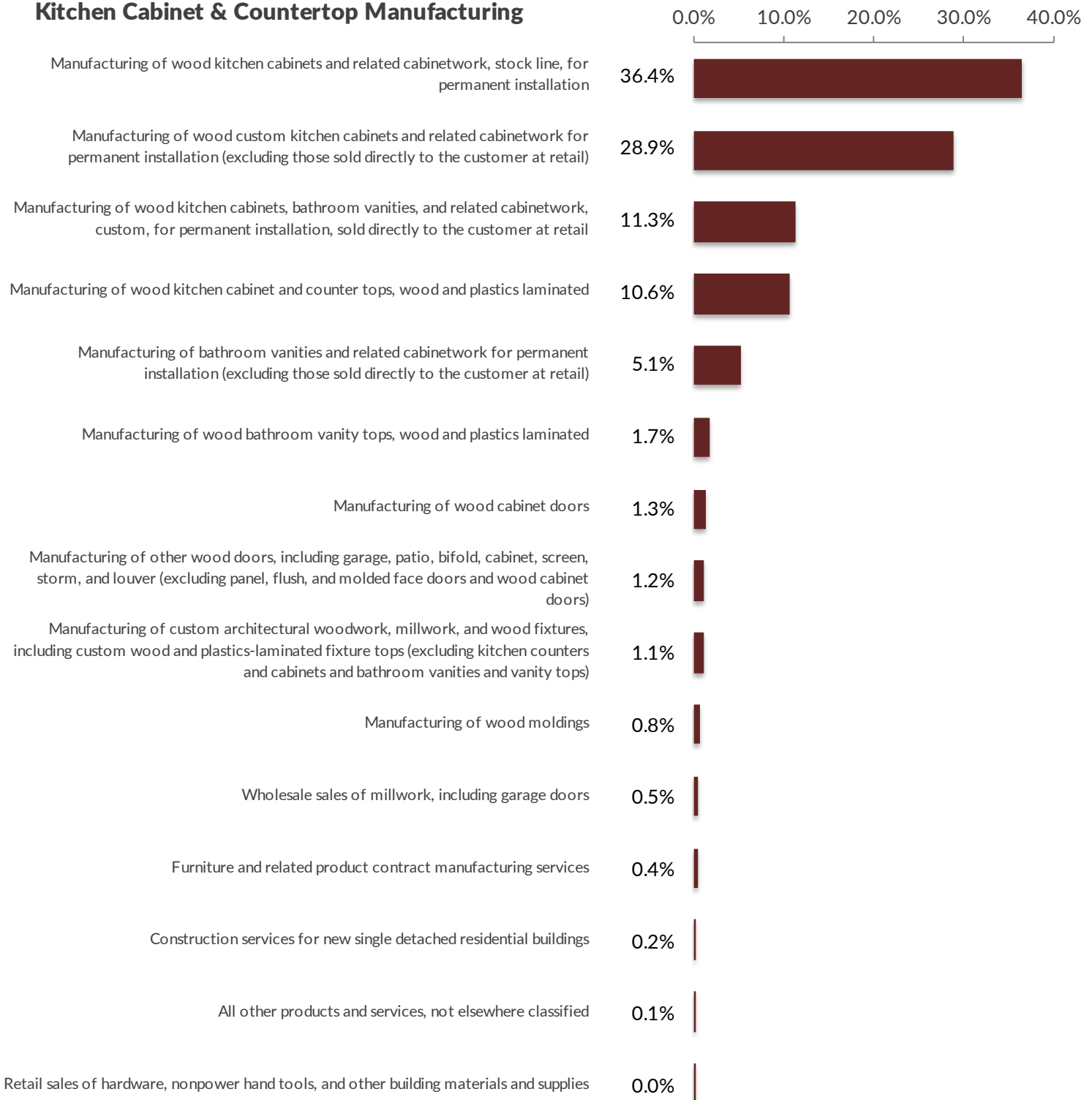


Compound Annual Growth Rate **0.1%** 3-Year **-0.2%** 5-Year

## 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 (%) Kitchen Cabinet & Countertop Manufacturing

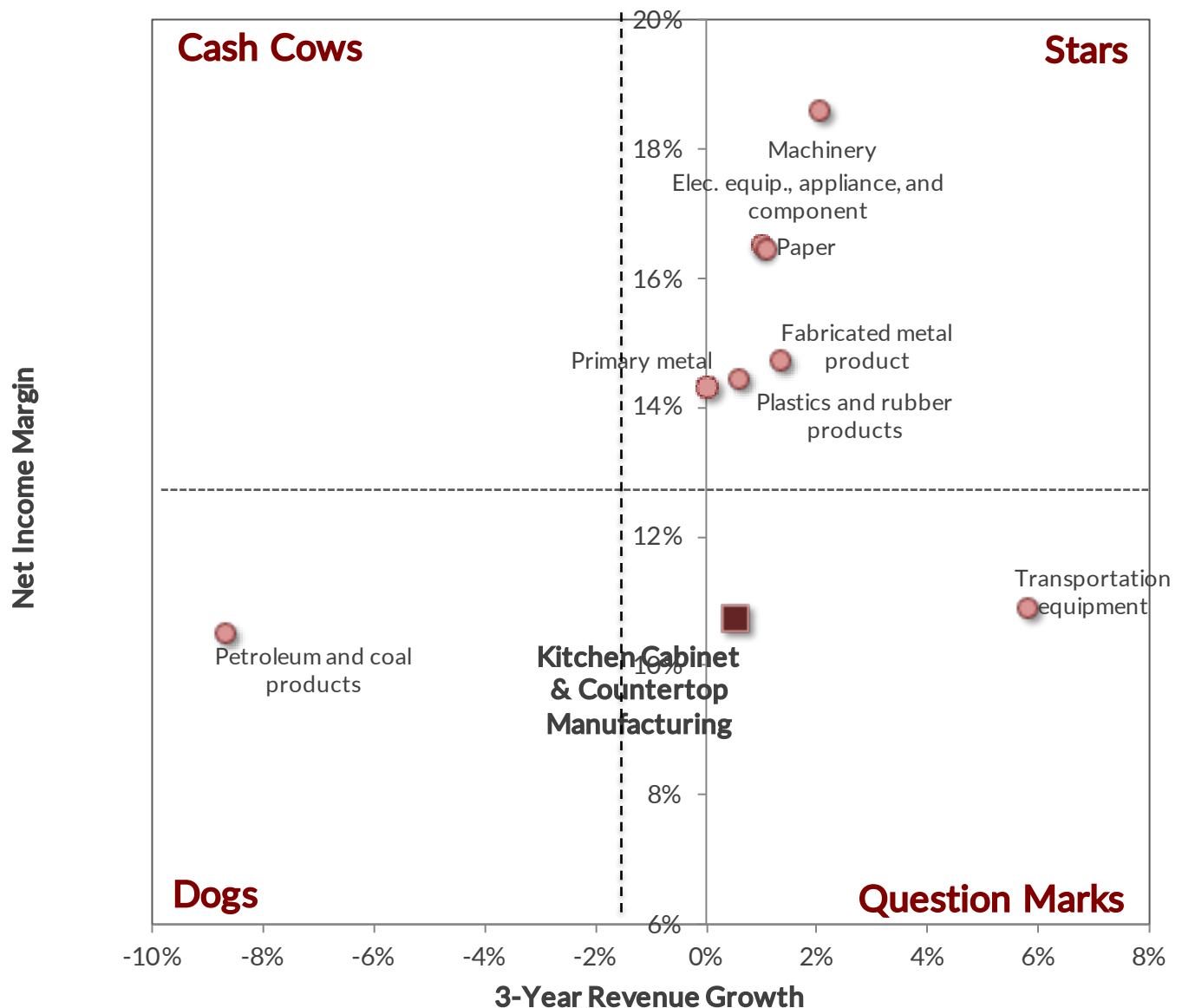


*Totals may not add up to 100% if there are more categories*

## 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?

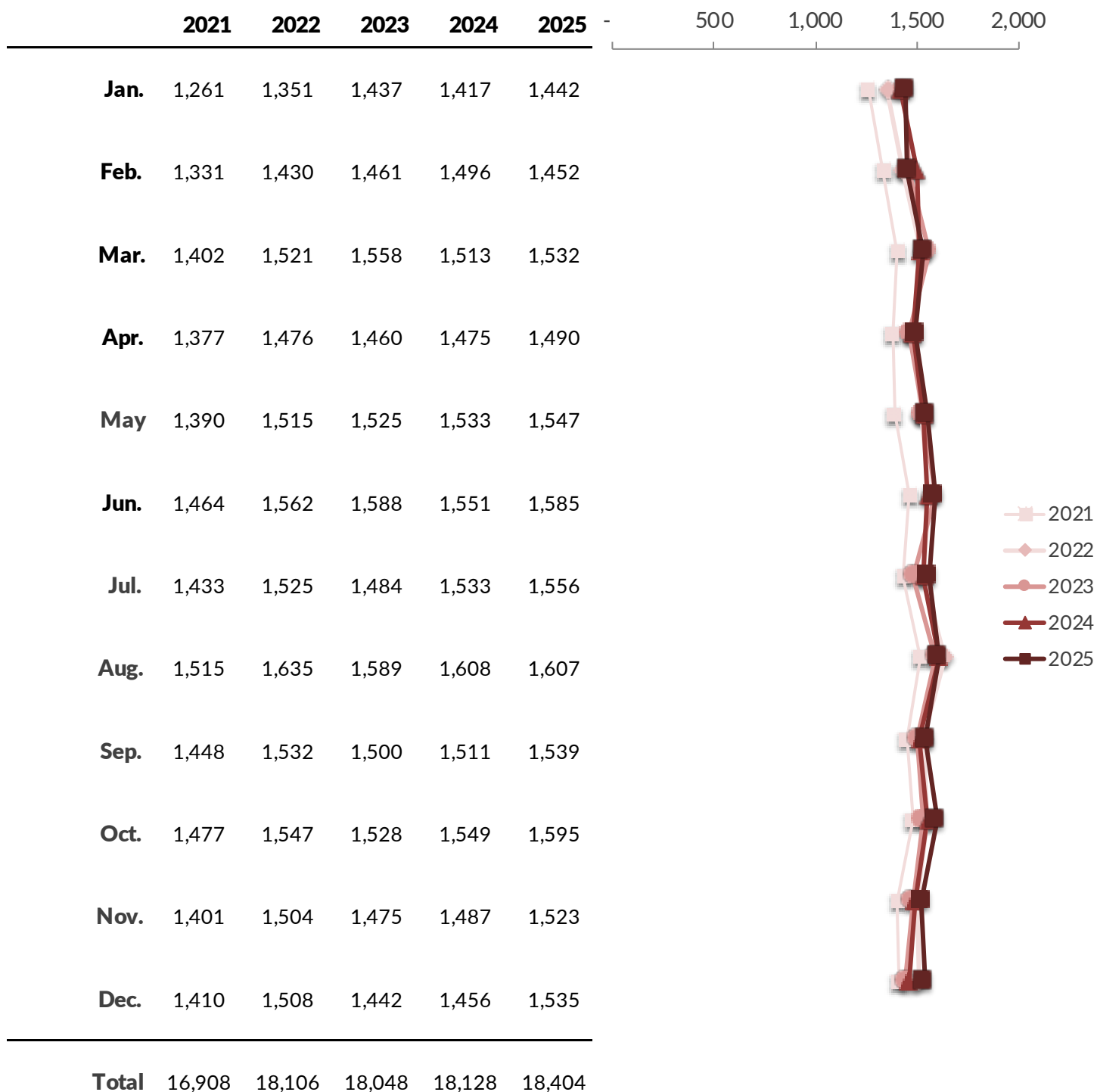
Industries which can generate high net income margin and high revenue growth are known as the Star industries, which often attract higher levels of competition chasing the growth. Those that generate low net income margin and low revenue growth are known as the Dogs. Often, Dog industries are very mature, 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.



## Total Sales by Month & Year

Below is total sales by month over the past 5 years for the Kitchen Cabinet & Countertop Manufacturing industry.

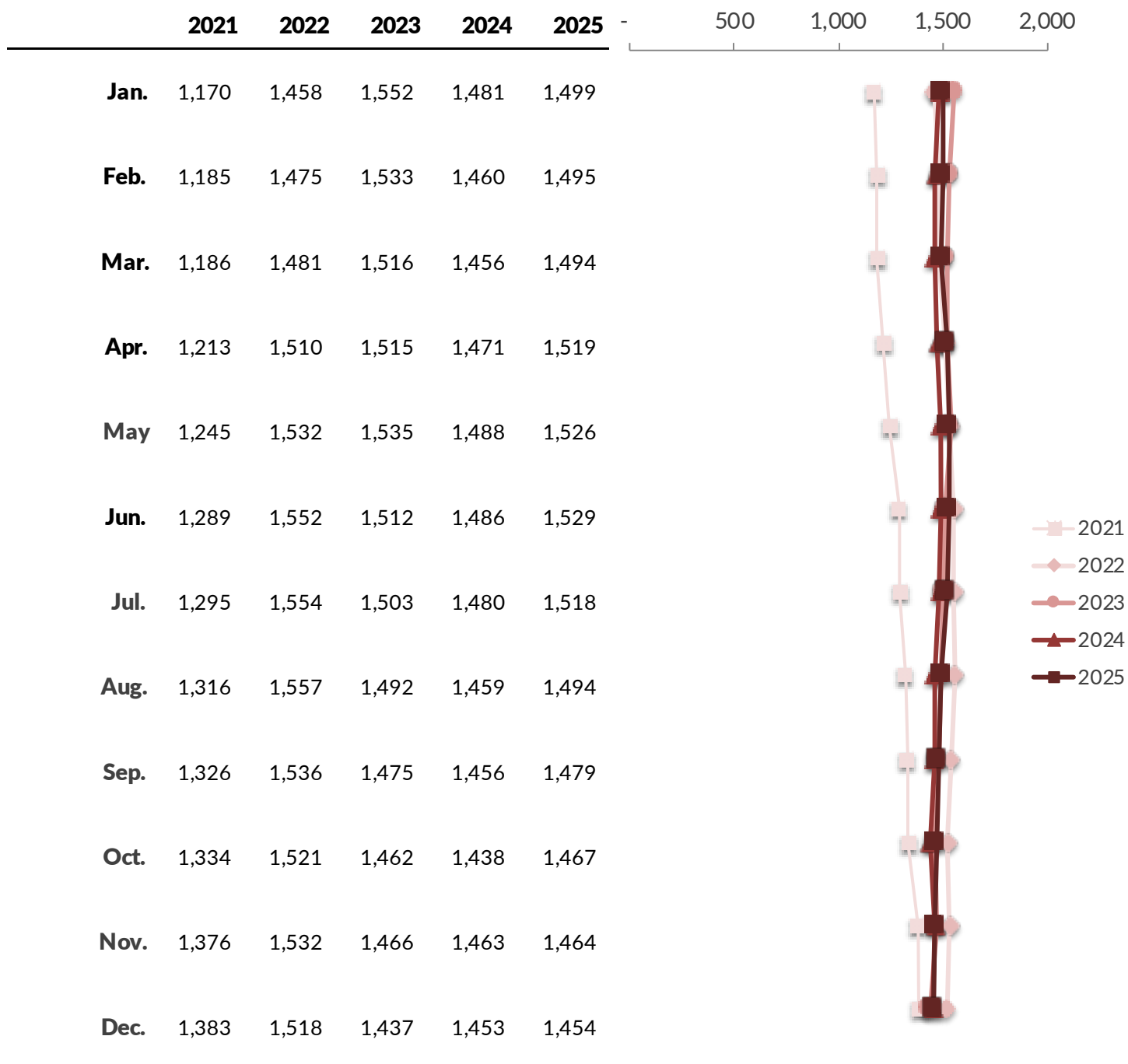
All figures in \$ millions



## Total Inventory by Month & Year

Below is total inventory value by month over the past 5 years for the Kitchen Cabinet & Countertop Manufacturing industry.

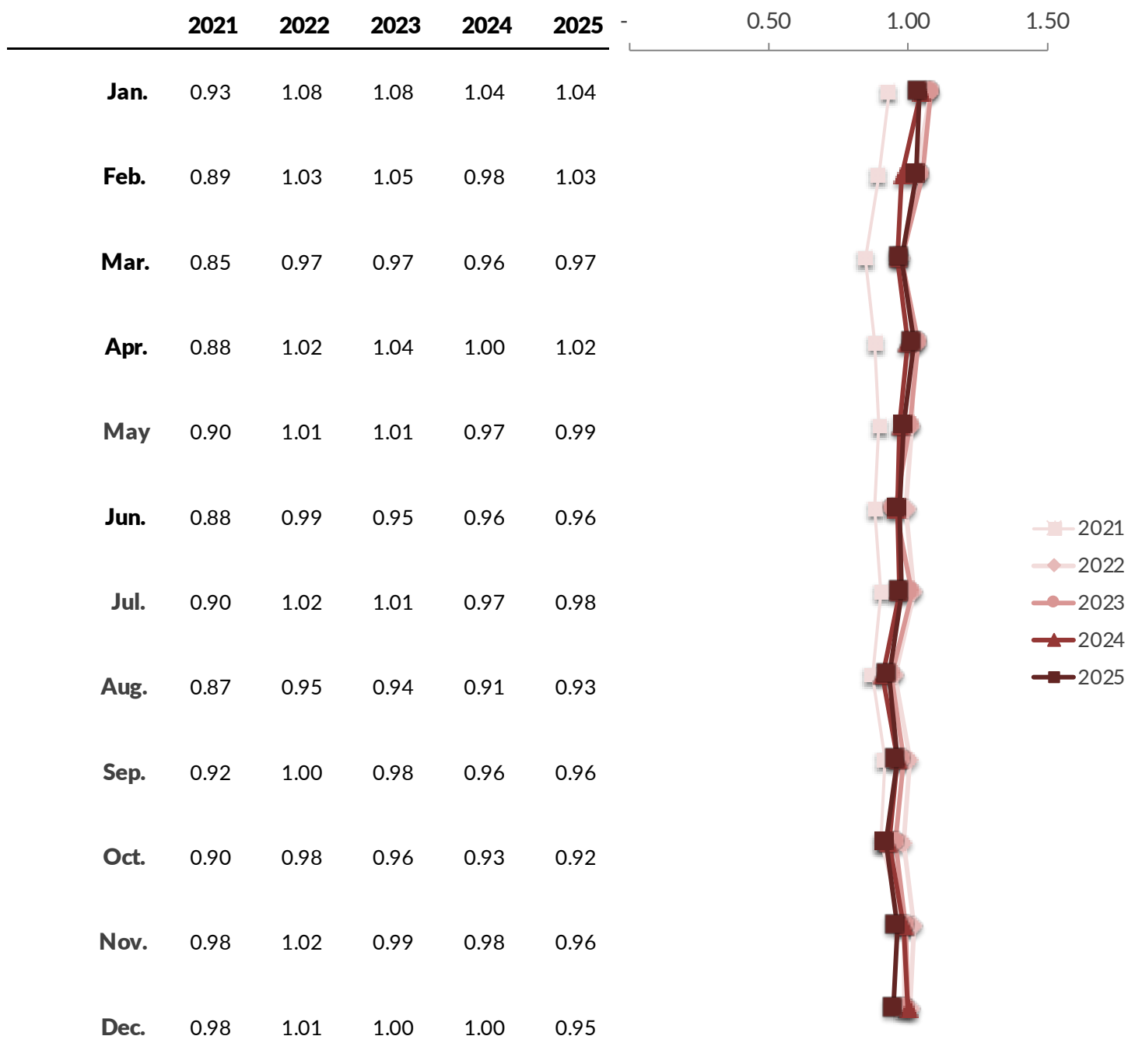
All figures in \$ millions



## Months of Inventory

Below is the months of inventory (monthly inventory divided by monthly sales) by month over the past 5 years for the Kitchen Cabinet & Countertop Manufacturing industry.

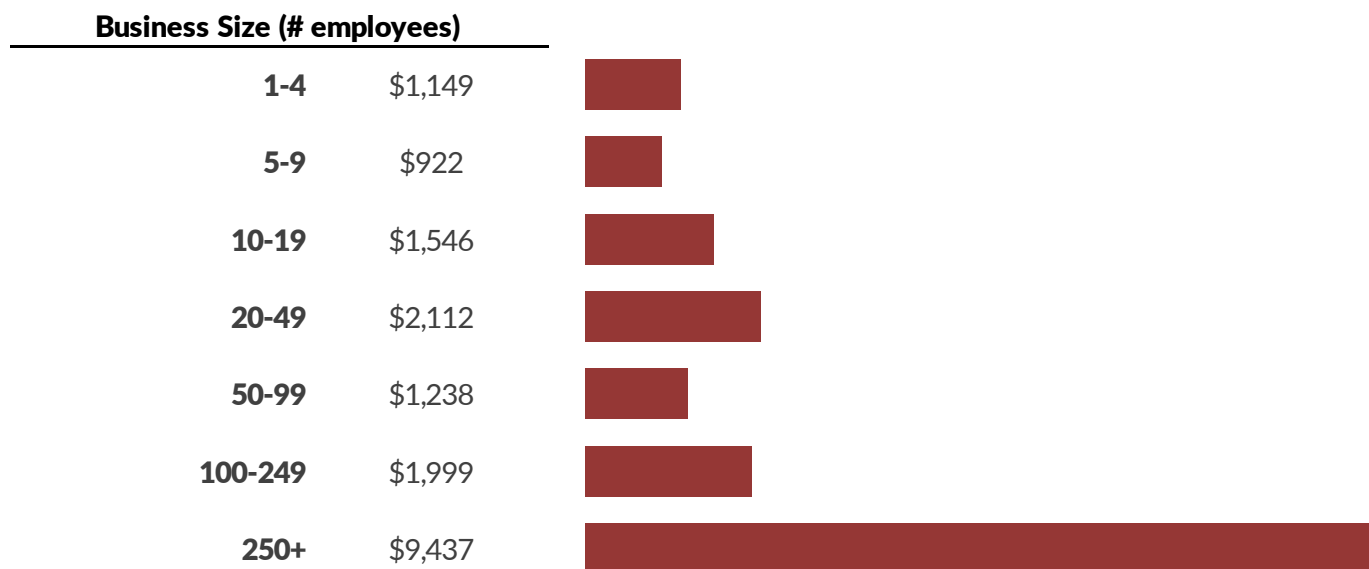
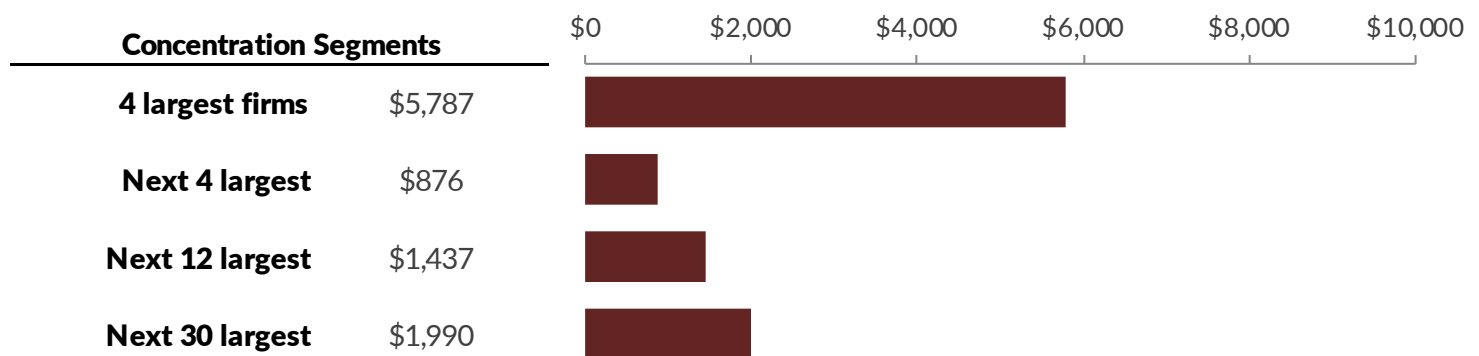
All figures in \$ millions



## Industry Revenue by Segments

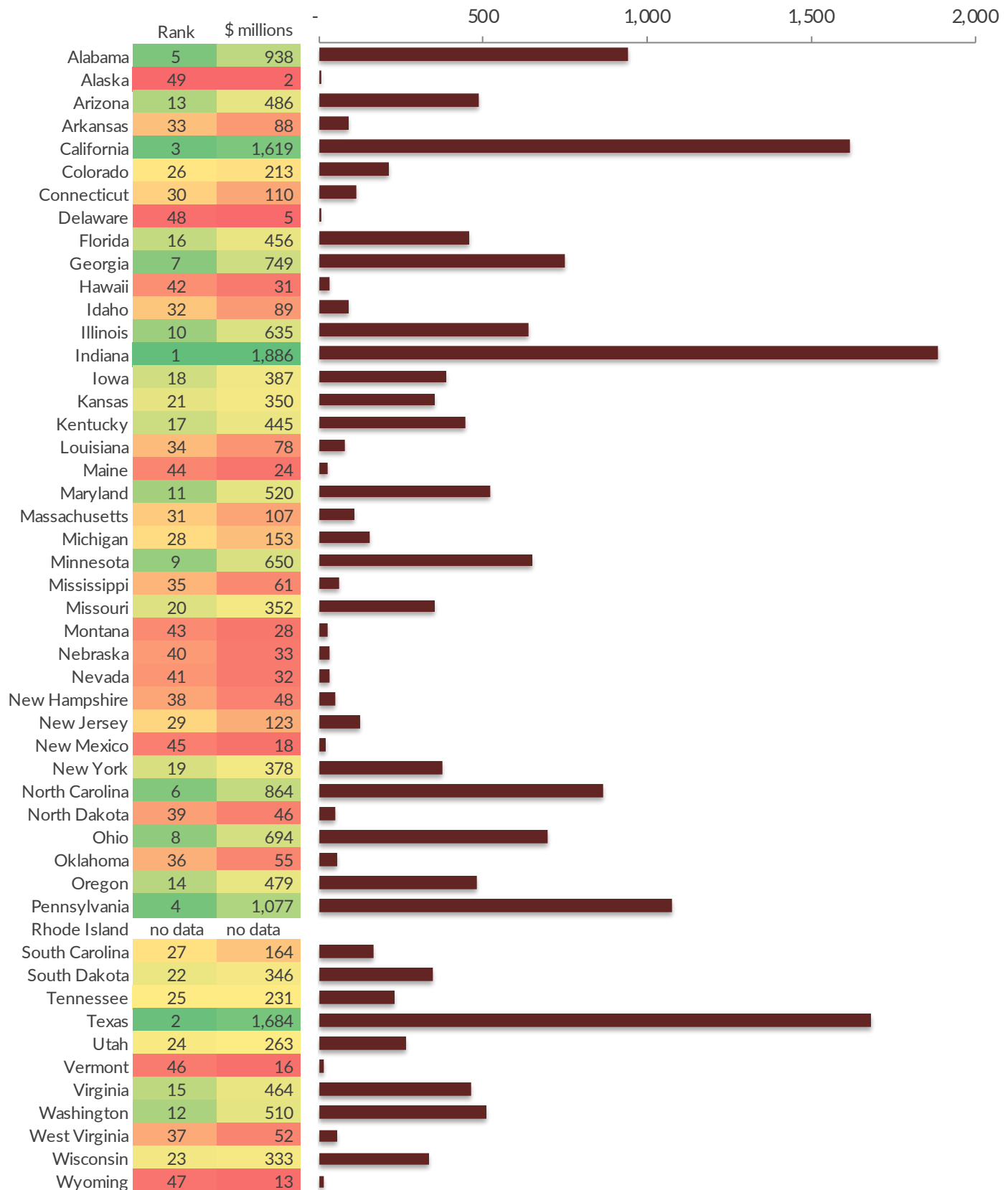
Below is total sales for various industry segmentations including concentration, business size by employees, and business structure.

All figures in \$ millions



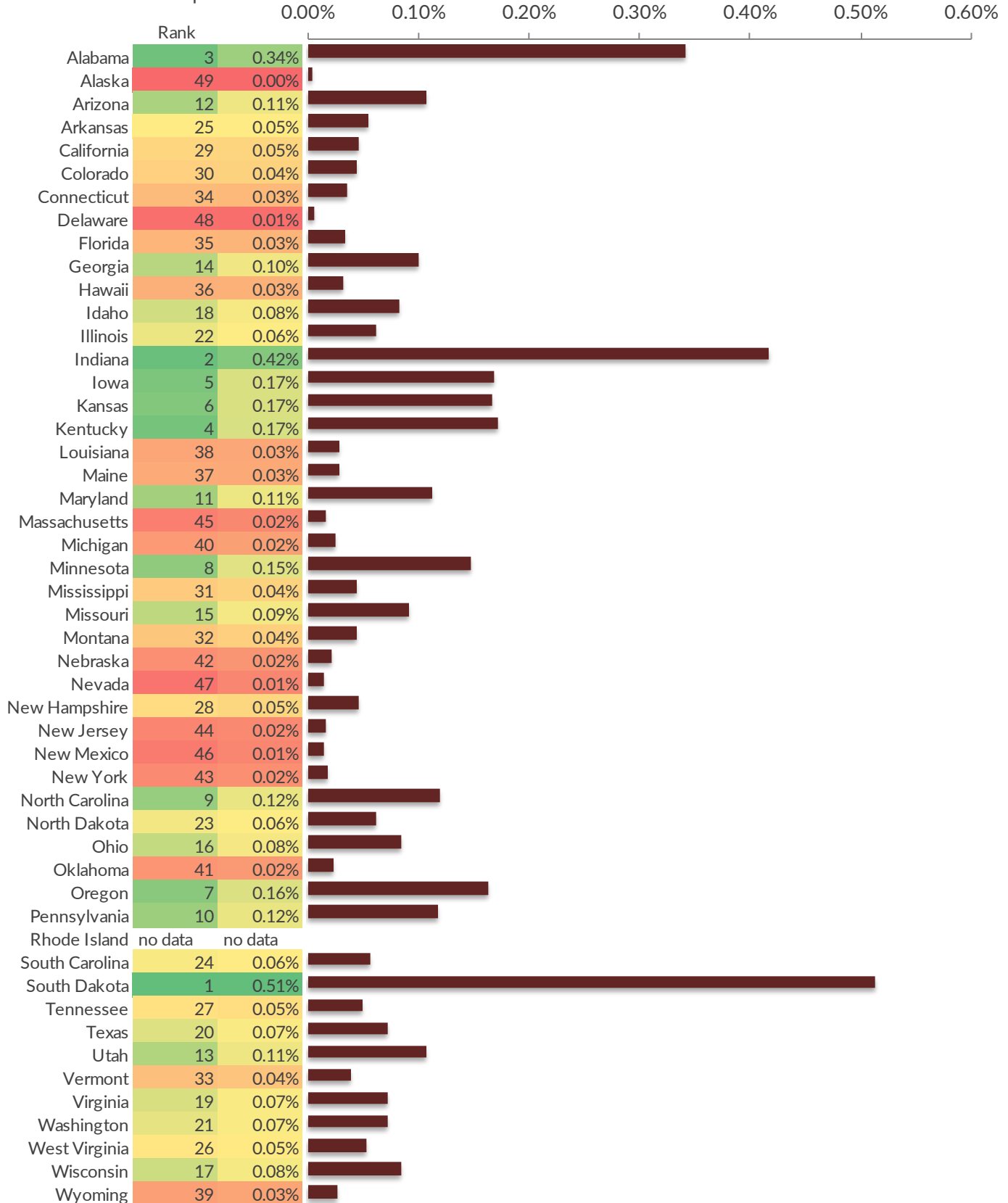
## Industry Revenue per State

Industry revenue per state in \$ millions. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



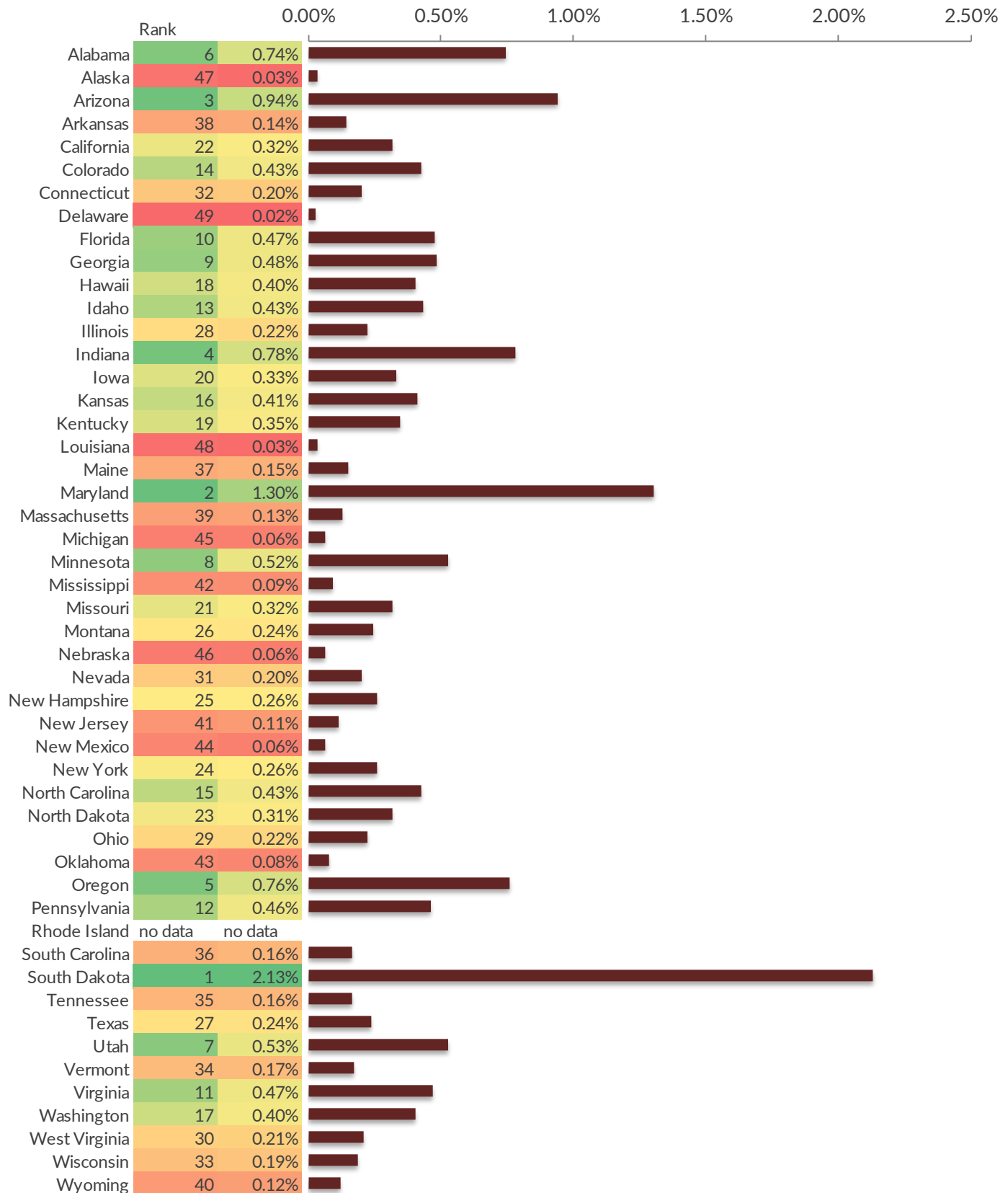
## Industry Revenue as a % of State GDP

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.



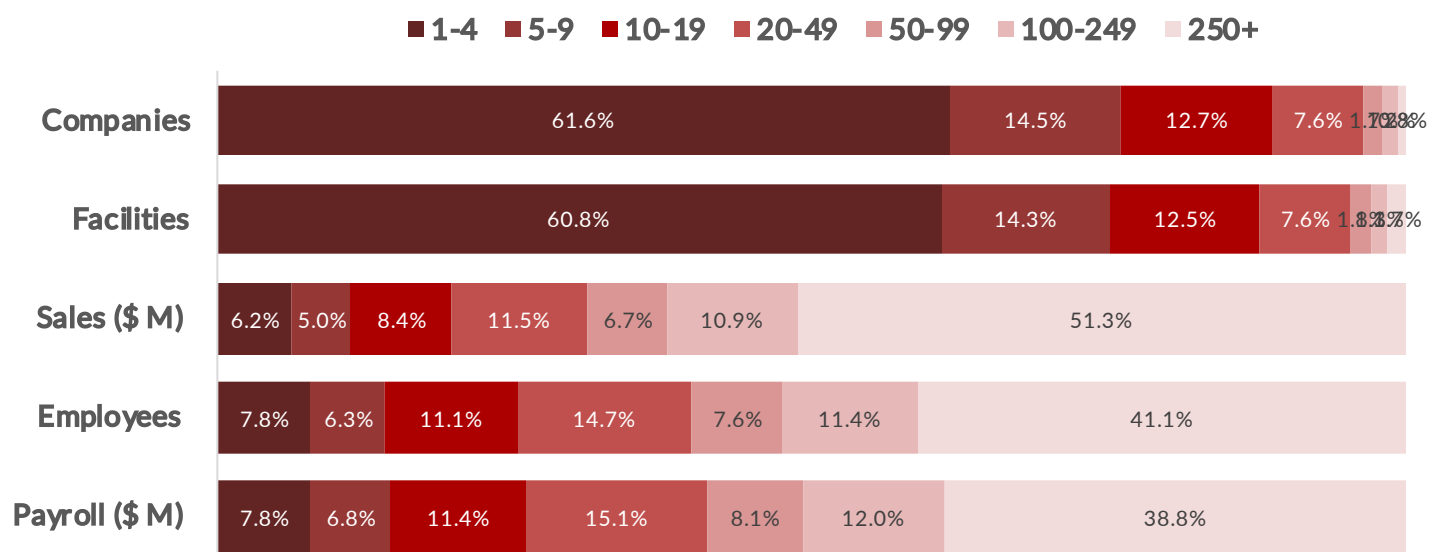
## Industry Segmentation by Business Size

Below are industry segmentation statistics by business size, including companies, facilities, sales, employees, and payroll. The business size segments are based on the number of employees per company. Both absolute and as a percent of the industry figures are included.

### Kitchen Cabinet & Countertop Manufacturing Segmentation by Business Size

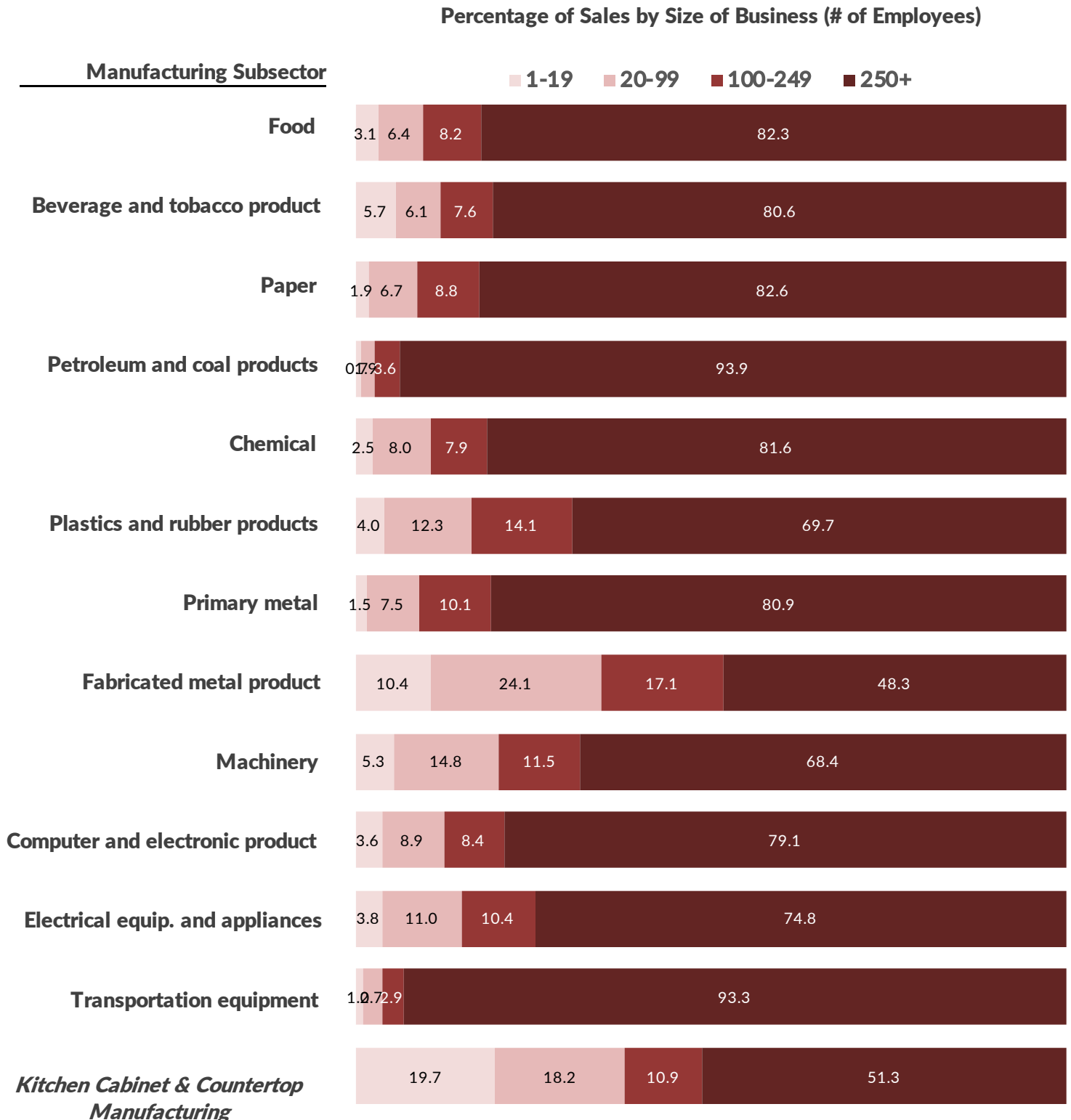
|                       | Number of Employees |       |        |        |       |         |        |
|-----------------------|---------------------|-------|--------|--------|-------|---------|--------|
|                       | 1-4                 | 5-9   | 10-19  | 20-49  | 50-99 | 100-249 | 250+   |
| <b>Companies</b>      | 3,732               | 878   | 767    | 461    | 103   | 72      | 47     |
| <b>Facilities</b>     | 3,715               | 874   | 765    | 463    | 109   | 77      | 105    |
| <b>Sales (\$ M)</b>   | 1,149               | 922   | 1,546  | 2,112  | 1,238 | 1,999   | 9,437  |
| <b>Employees</b>      | 7,391               | 5,979 | 10,444 | 13,863 | 7,156 | 10,771  | 38,799 |
| <b>Payroll (\$ M)</b> | 365                 | 317   | 533    | 706    | 376   | 559     | 1,813  |

|                       | Number of Employees |       |       |       |       |         |       |
|-----------------------|---------------------|-------|-------|-------|-------|---------|-------|
|                       | 1-4                 | 5-9   | 10-19 | 20-49 | 50-99 | 100-249 | 250+  |
| <b>Companies</b>      | 61.6%               | 14.5% | 12.7% | 7.6%  | 1.7%  | 1.2%    | 0.8%  |
| <b>Facilities</b>     | 60.8%               | 14.3% | 12.5% | 7.6%  | 1.8%  | 1.3%    | 1.7%  |
| <b>Sales (\$ M)</b>   | 6.2%                | 5.0%  | 8.4%  | 11.5% | 6.7%  | 10.9%   | 51.3% |
| <b>Employees</b>      | 7.8%                | 6.3%  | 11.1% | 14.7% | 7.6%  | 11.4%   | 41.1% |
| <b>Payroll (\$ M)</b> | 7.8%                | 6.8%  | 11.4% | 15.1% | 8.1%  | 12.0%   | 38.8% |



## Sector Size of Business Sales Benchmarks

Below are sector sales benchmarks segmented by size of company, with the Kitchen Cabinet & Countertop Manufacturing sales segmentation reflected on the bottom for comparison.



## Industry Segmentation by Concentration

Below are industry segmentation statistics by industry sales concentration, including companies, locations, sales, employees, and payroll. The concentration segmentation is based on the 50 largest companies in the industry (top 4 largest companies, next 4 largest, next 12 largest, and next 30 largest). Both absolute and as a percent of the industry figures are included.

### Kitchen Cabinet & Countertop Manufacturing Segmentation by Business Size

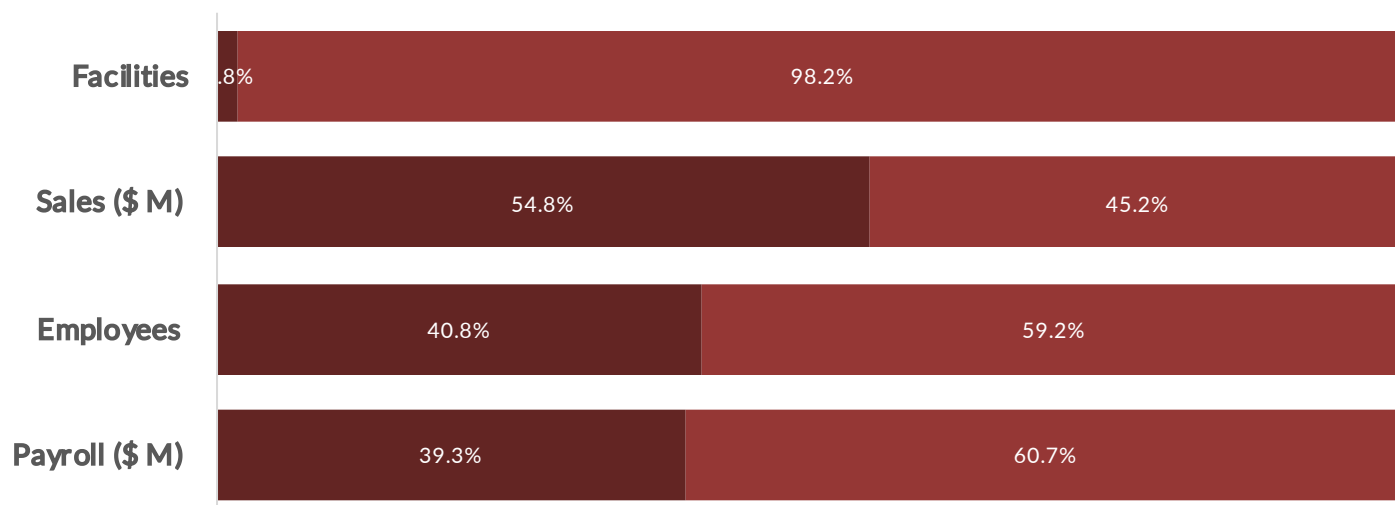
#### Largest Companies Ranked by Revenue

|                       | 1-4    | 5-8   | 9-20  | 21-50 | Top 50 | Rest of Industry |
|-----------------------|--------|-------|-------|-------|--------|------------------|
| <b>Companies</b>      | 4      | 4     | 12    | 30    | 50     | 6,010            |
| <b>Facilities</b>     | 31     | 9     | 27    | 46    | 112    | 5,995            |
| <b>Sales (\$ M)</b>   | 5,787  | 876   | 1,437 | 1,990 | 10,091 | 8,314            |
| <b>Employees</b>      | 18,201 | 2,418 | 8,124 | 9,728 | 38,472 | 55,931           |
| <b>Payroll (\$ M)</b> | 824    | 133   | 370   | 509   | 1,836  | 2,832            |

#### Largest Companies Ranked by Revenue

|                       | 1-4   | 5-8  | 9-20 | 21-50 | Top 50 | Rest of Industry |
|-----------------------|-------|------|------|-------|--------|------------------|
| <b>Facilities</b>     | 0.5%  | 0.2% | 0.4% | 0.8%  | 1.8%   | 98.2%            |
| <b>Sales (\$ M)</b>   | 31.4% | 4.8% | 7.8% | 10.8% | 54.8%  | 45.2%            |
| <b>Employees</b>      | 19.3% | 2.6% | 8.6% | 10.3% | 40.8%  | 59.2%            |
| <b>Payroll (\$ M)</b> | 17.6% | 2.9% | 7.9% | 10.9% | 39.3%  | 60.7%            |

■ Top 50 ■ Rest of Industry



## Market Share by Largest Companies

Below are 2018 and 2023 marketshare benchmarks; % of industry sales and absolute sales by the 4 largest companies, next 4, next 12, next 30, and top 50 for Kitchen Cabinet & Countertop Manufacturing.

### Kitchen Cabinet & Countertop Manufacturing

|                            | Market Share by Concentration Segment |       |       |
|----------------------------|---------------------------------------|-------|-------|
|                            | 2020                                  | 2025  | Delta |
| <b>4 Largest Companies</b> | 31.4%                                 | 27.3% | -4.1% |
| <b>Next 4 Companies</b>    | 4.8%                                  | 7.9%  | 3.1%  |
| <b>Next 12 Companies</b>   | 7.8%                                  | 7.5%  | -0.3% |
| <b>Next 30 Companies</b>   | 10.8%                                 | 8.9%  | -1.9% |
| <b>Top 50 Companies</b>    | 54.8%                                 | 51.6% | -3.2% |

|                            | Total Sales by Concentration Segment<br>(\$ Millions) |         |           |
|----------------------------|-------------------------------------------------------|---------|-----------|
|                            | 2020                                                  | 2025    | 5-yr CAGR |
| <b>4 Largest Companies</b> | \$4,762                                               | \$5,024 | 1.1%      |
| <b>Next 4 Companies</b>    | \$721                                                 | \$1,454 | 15.1%     |
| <b>Next 12 Companies</b>   | \$1,183                                               | \$1,380 | 3.1%      |
| <b>Next 30 Companies</b>   | \$1,637                                               | \$1,638 | 0.0%      |
| <b>Top 50 Companies</b>    | \$8,303                                               | \$9,497 | 2.7%      |
| <b>Top 50 Companies</b>    | \$6,841                                               | \$8,908 | 5.4%      |

## Manufacturing Sectors Market Share for Top 50 Companies

Below are sales concentration benchmarks; % of industry sales the top 50 companies represent per major manufacturing sector for 2018 and 2023, with the Kitchen Cabinet & Countertop Manufacturing sales concentration reflected on the bottom for comparison.

| Manufacturing Subsector                               | 2020  | 2025  | Delta | % of Industry Sales - Top 50 Companies                                               |
|-------------------------------------------------------|-------|-------|-------|--------------------------------------------------------------------------------------|
| Food                                                  | 50.9% | 46.5% | -4.4% |    |
| Beverage and tobacco product                          | 84.6% | 77.9% | -6.7% |    |
| Paper                                                 | 69.4% | 71.1% | 1.7%  |    |
| Petroleum and coal products                           | 96.8% | 95.2% | -1.6% |    |
| Chemical                                              | 52.7% | 50.2% | -2.5% |    |
| Plastics and rubber products                          | 34.3% | 32.9% | -1.4% |  |
| Primary metal                                         | 61.4% | 60.5% | -0.9% |  |
| Fabricated metal product                              | 19.8% | 19.5% | -0.3% |  |
| Machinery                                             | 40.1% | 35.2% | -4.9% |  |
| Computer and electronic product                       | 47.9% | 49.3% | 1.4%  |  |
| Electrical equip. and appliances                      | 52.8% | 49.4% | -3.4% |  |
| Transportation equipment                              | 69.9% | 71.0% | 1.1%  |  |
| <i>Kitchen Cabinet &amp; Countertop Manufacturing</i> | 51.6% | 54.8% | 3.2%  |  |

## Industry Segmentation by Business Structure

Below are the various industry segmentation metrics including companies, locations, sales, employees and payroll by business structure including C-Corporations, S-Corporations, Partnerships, and Sole Proprietorships. Both absolute and as a percent of the industry figures are included.

### Kitchen Cabinet & Countertop Manufacturing Segmentation by Business Structure

#### Business Structure

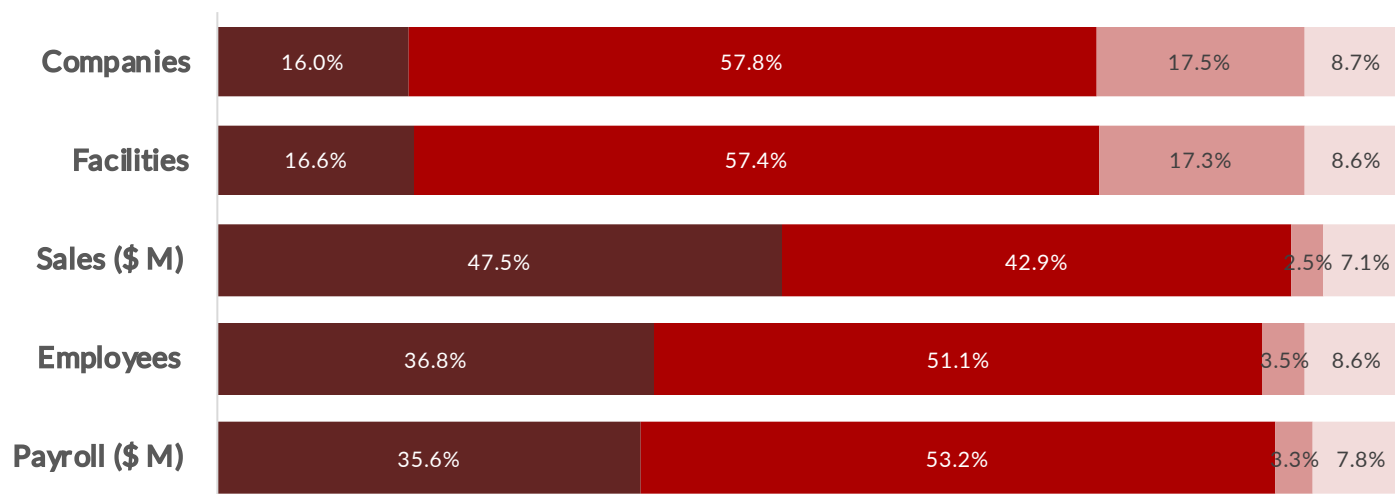
|                       | C-Corporations | S-Corporations | Partnerships | Sole Proprietorships |
|-----------------------|----------------|----------------|--------------|----------------------|
| <b>Companies</b>      | 973            | 3,502          | 1,061        | 525                  |
| <b>Facilities</b>     | 1,016          | 3,507          | 1,056        | 528                  |
| <b>Sales (\$ M)</b>   | 8,734          | 7,902          | 462          | 1,306                |
| <b>Employees</b>      | 34,700         | 48,281         | 3,337        | 8,084                |
| <b>Payroll (\$ M)</b> | 1,663          | 2,485          | 156          | 365                  |

#### Business Structure

|                       | C-Corporations | S-Corporations | Partnerships | Sole Proprietorships |
|-----------------------|----------------|----------------|--------------|----------------------|
| <b>Companies</b>      | 16.0%          | 57.8%          | 17.5%        | 8.7%                 |
| <b>Facilities</b>     | 16.6%          | 57.4%          | 17.3%        | 8.6%                 |
| <b>Sales (\$ M)</b>   | 47.5%          | 42.9%          | 2.5%         | 7.1%                 |
| <b>Employees</b>      | 36.8%          | 51.1%          | 3.5%         | 8.6%                 |
| <b>Payroll (\$ M)</b> | 35.6%          | 53.2%          | 3.3%         | 7.8%                 |

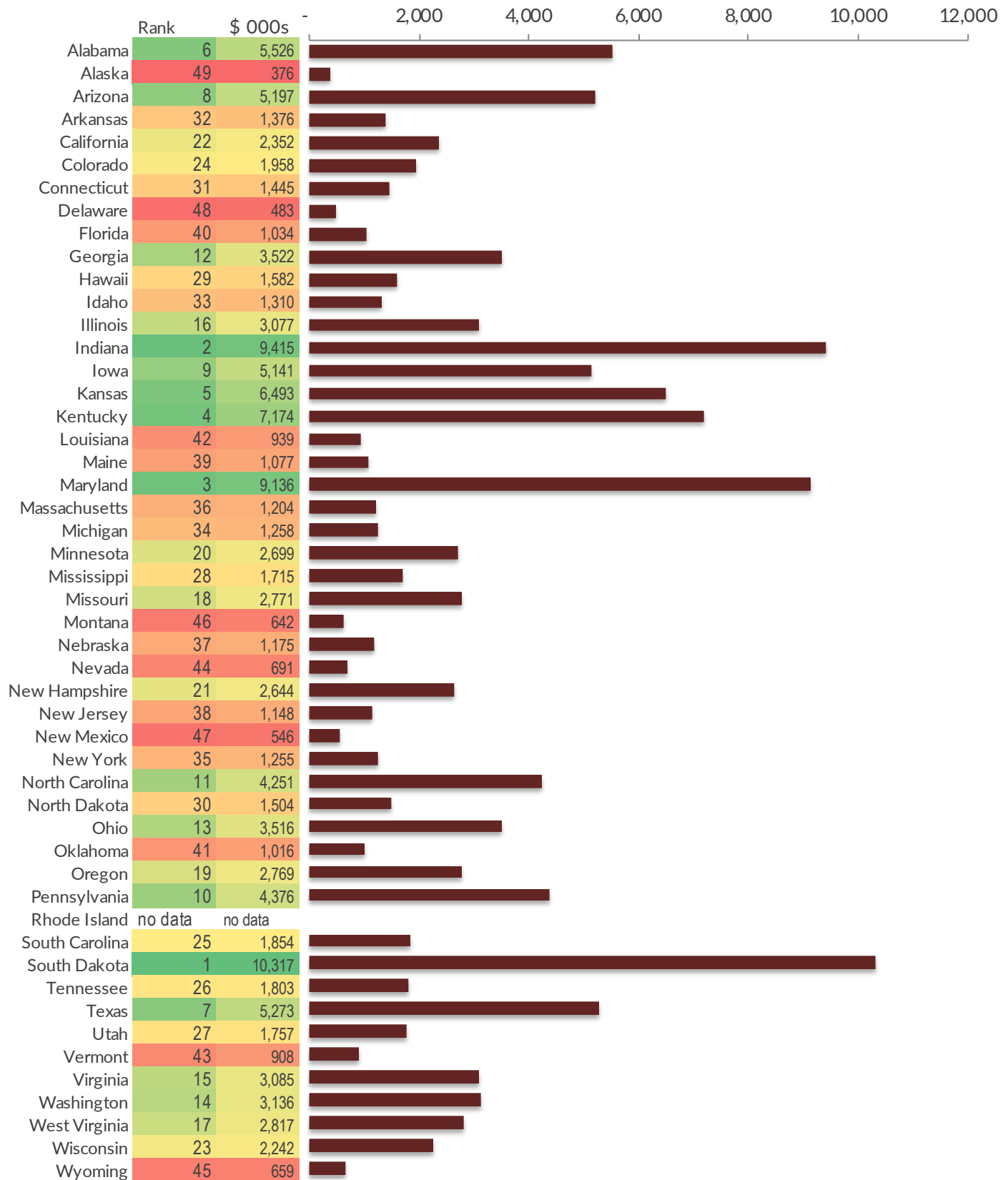
■ C-Corporations

■ S-Corporations



## Sales per Company by State

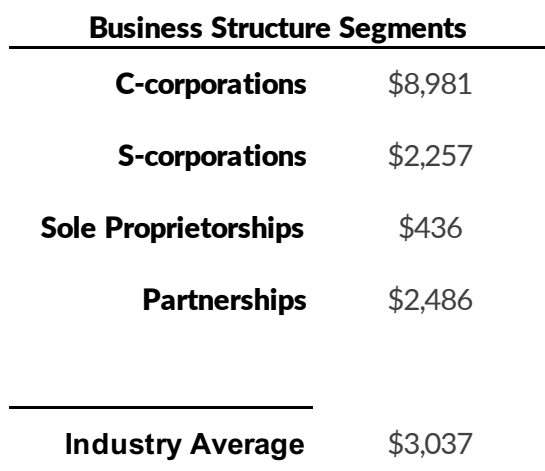
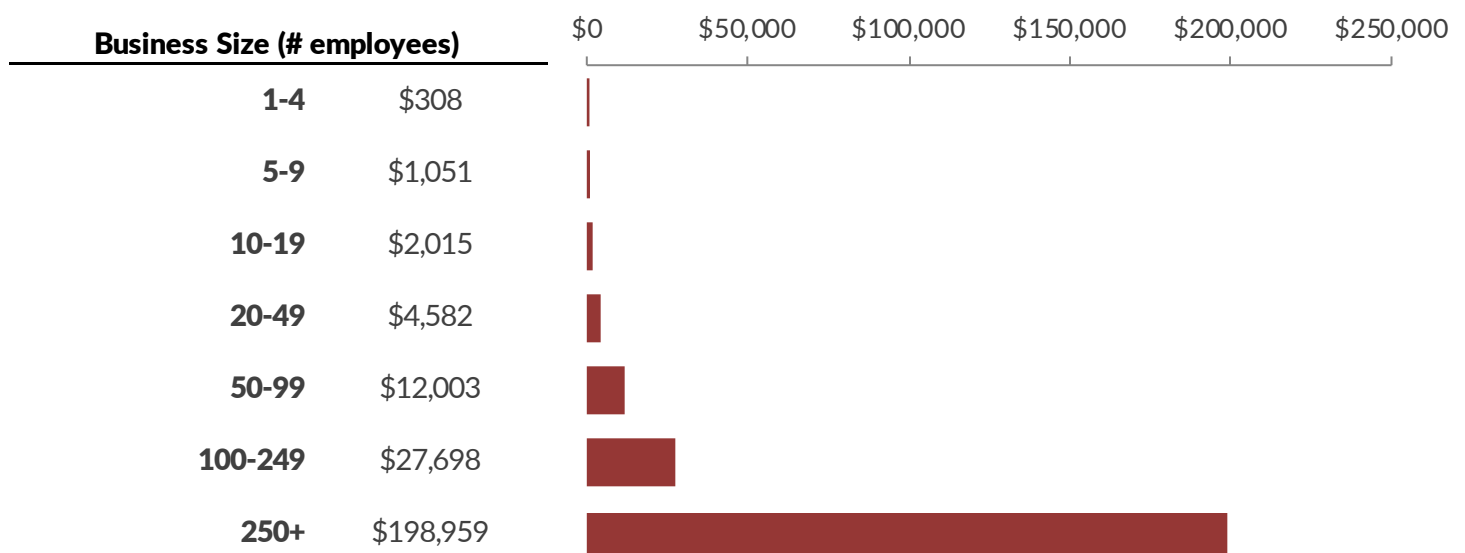
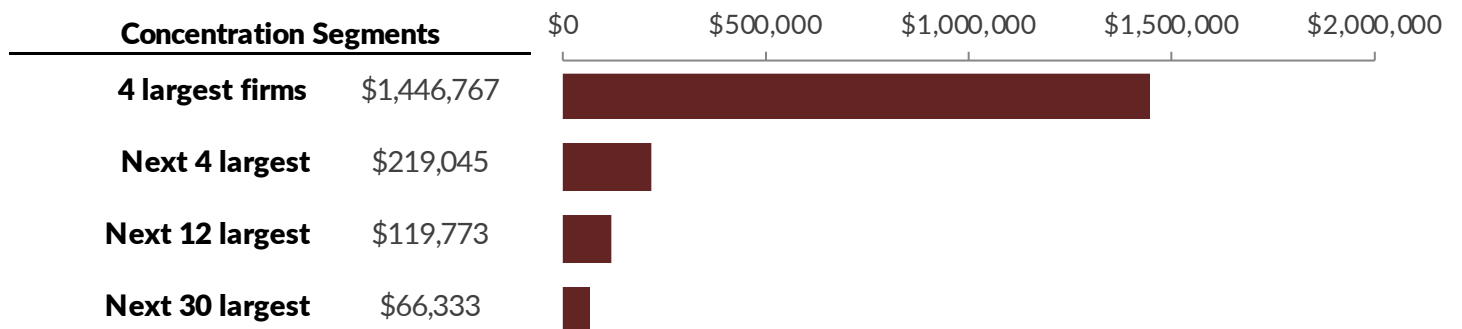
Sales per company highlights the competitive intensity and leverage of companies in a state. Those states with high sales per company most likely face increasing competition. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



## Sales per Company by Segment

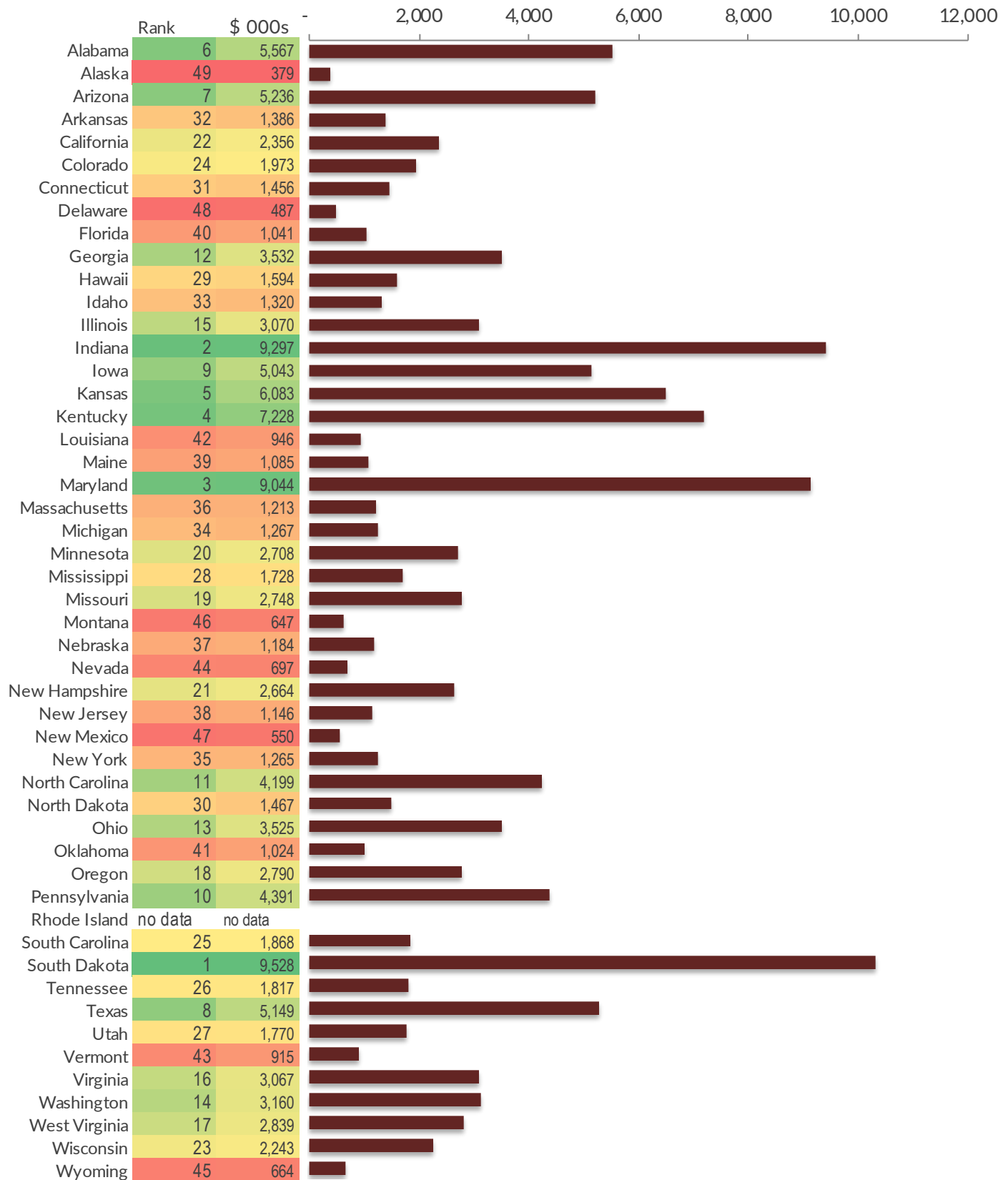
Below is the average sales per company for industry segmentations including concentration, business size by employees, and business structure.

All figures in \$ thousands



## Sales per Facility by State

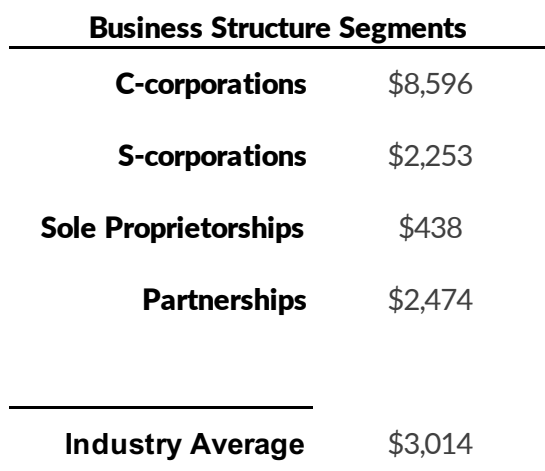
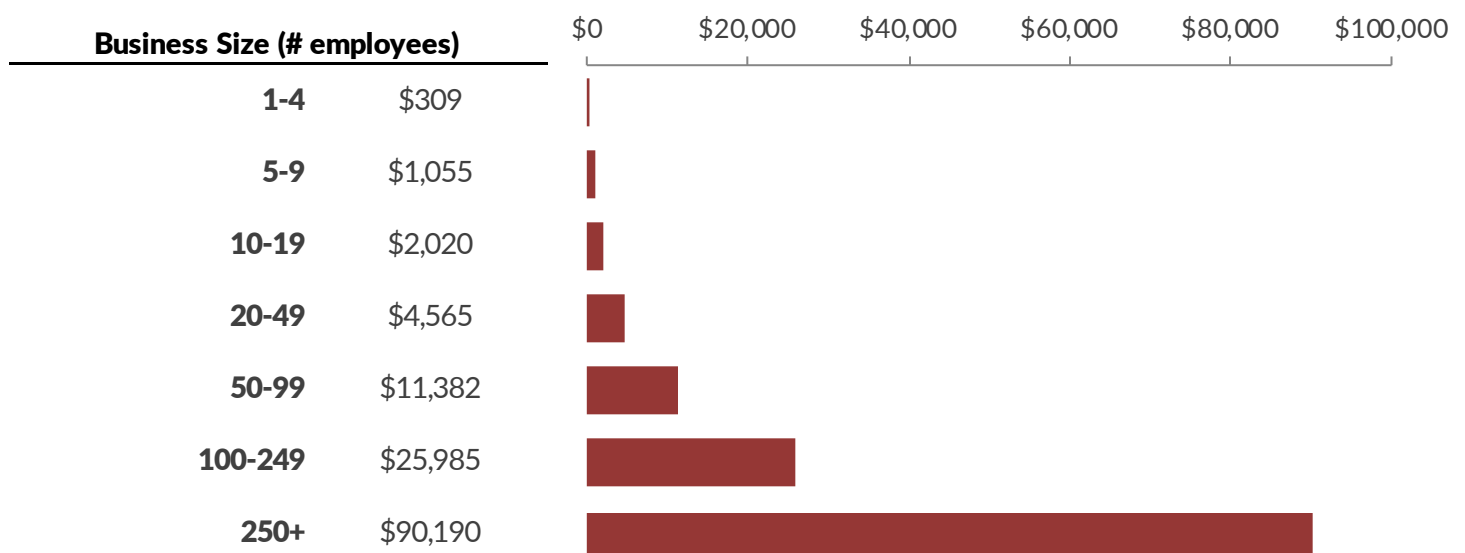
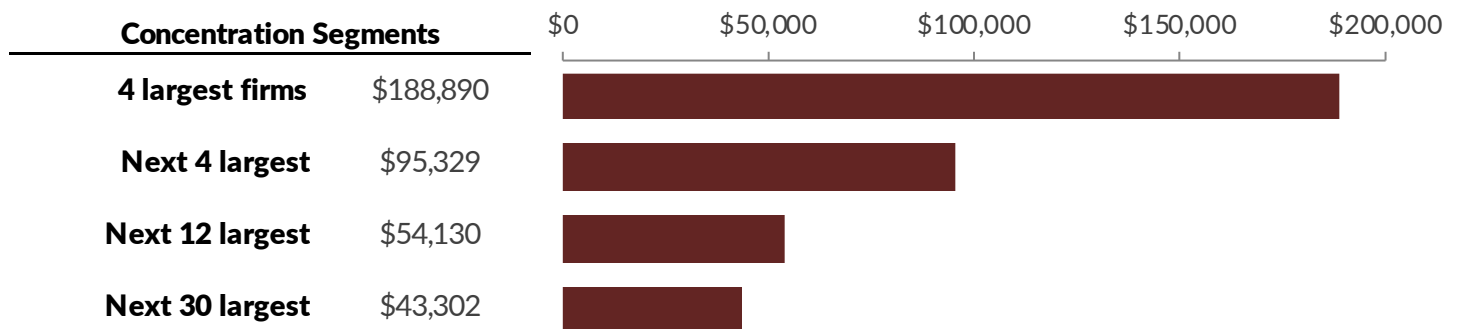
Below are the sales per facility per state. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



## Sales per Facility by Segment

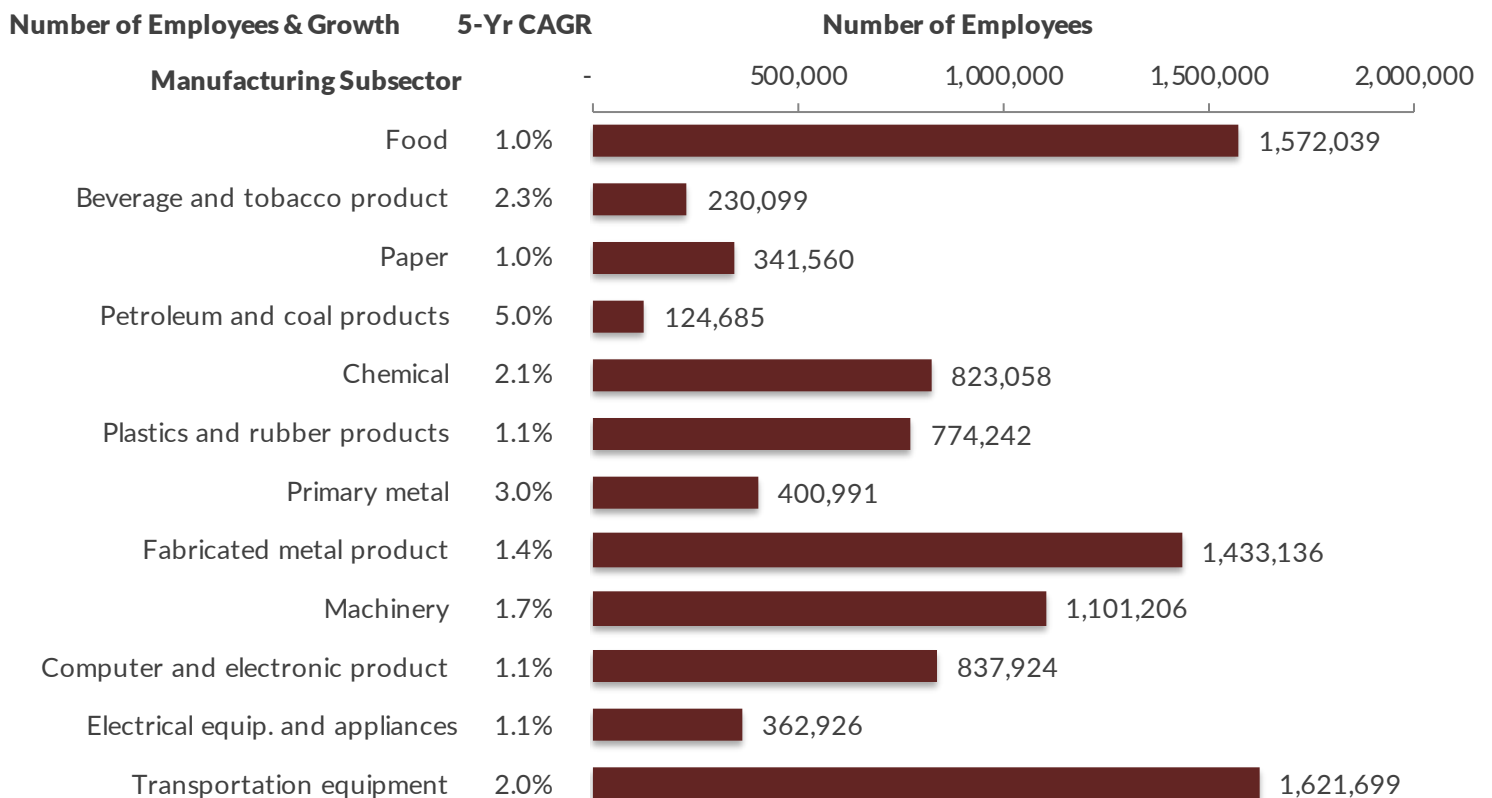
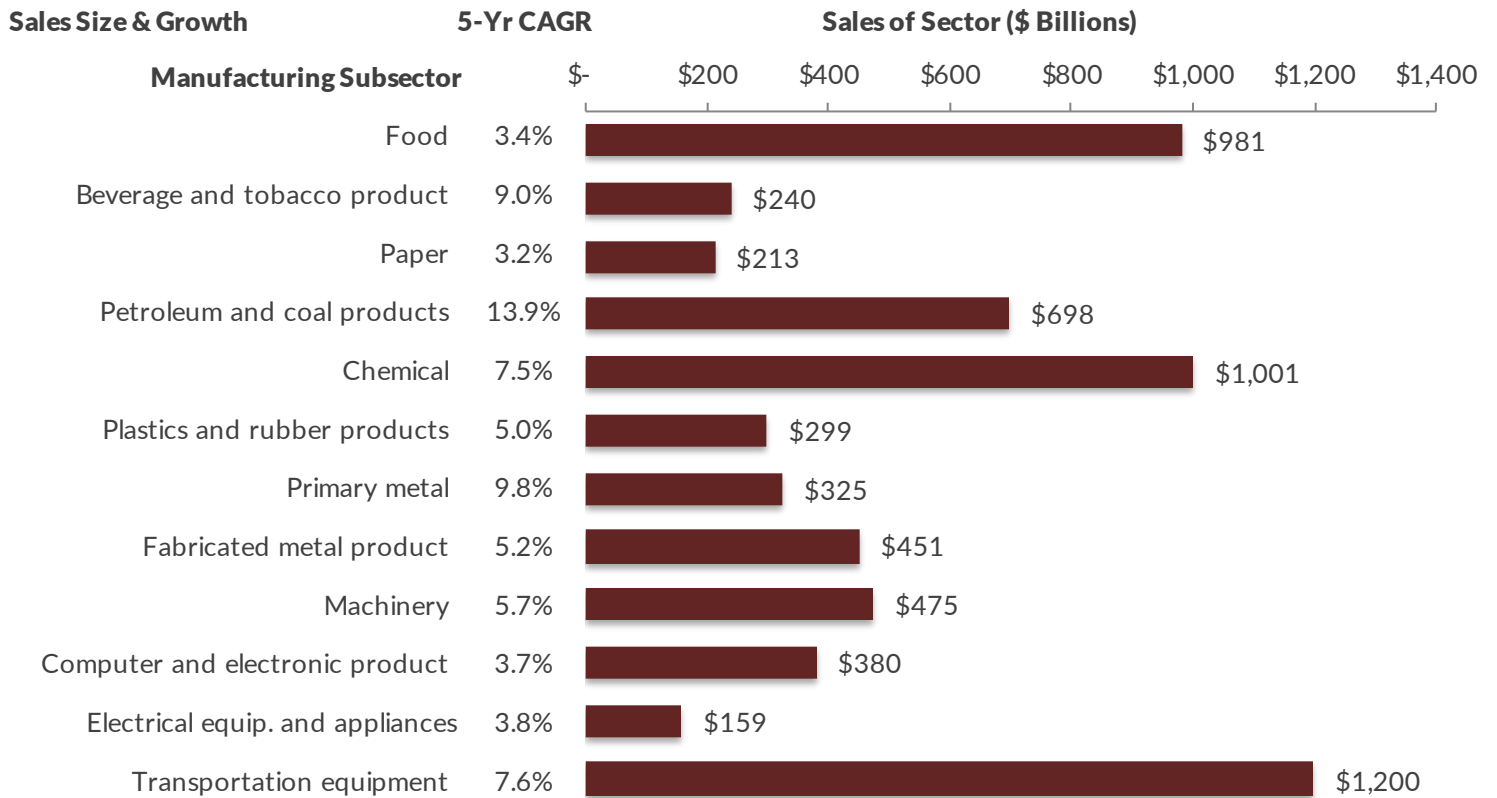
Below is the average sales per facility for industry segmentations including concentration, business size by employees, and business structure.

All figures in \$ thousands



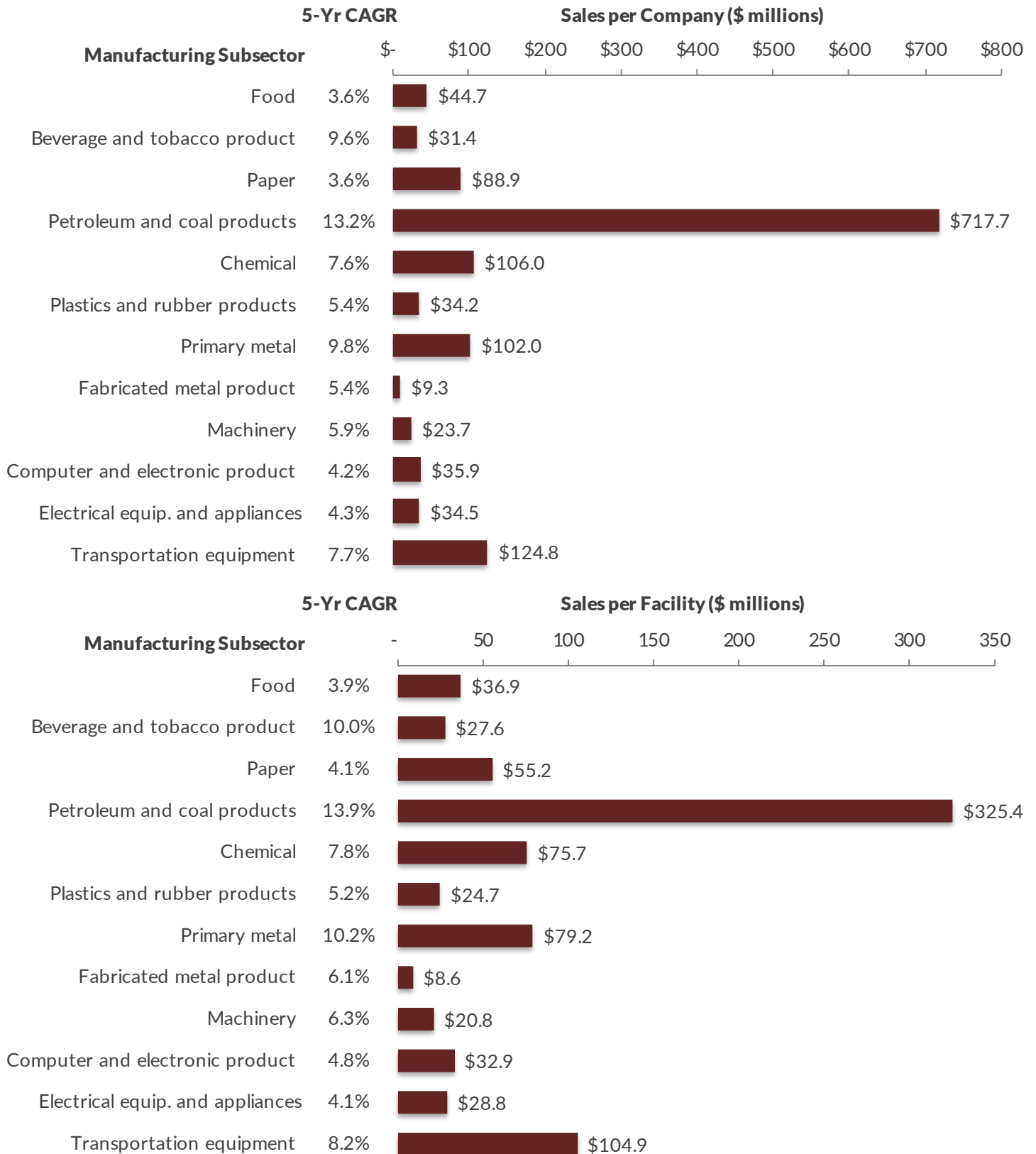
## Manufacturing Sector Growth

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.



## Manufacturing Sectors Sales Statistics

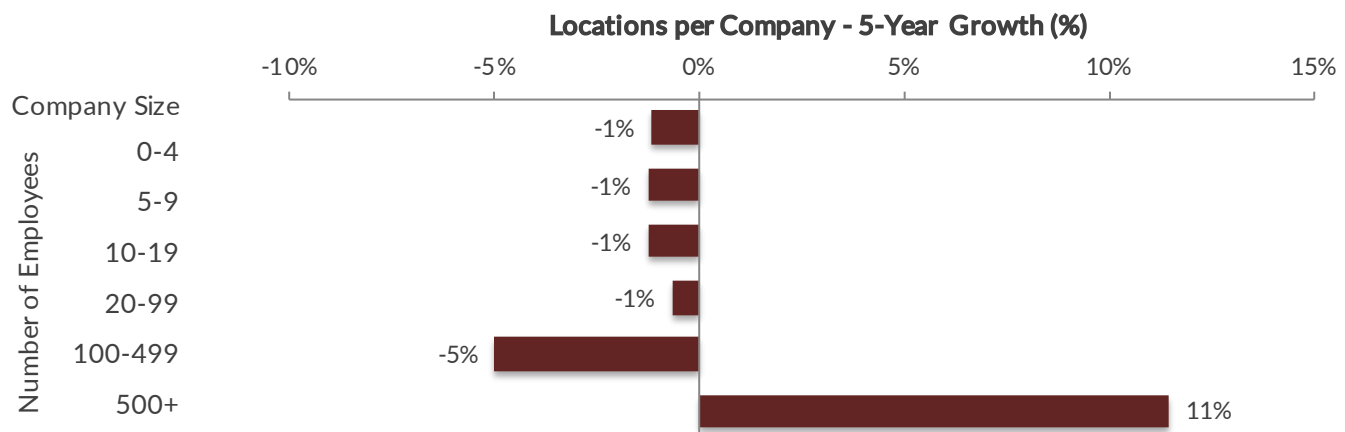
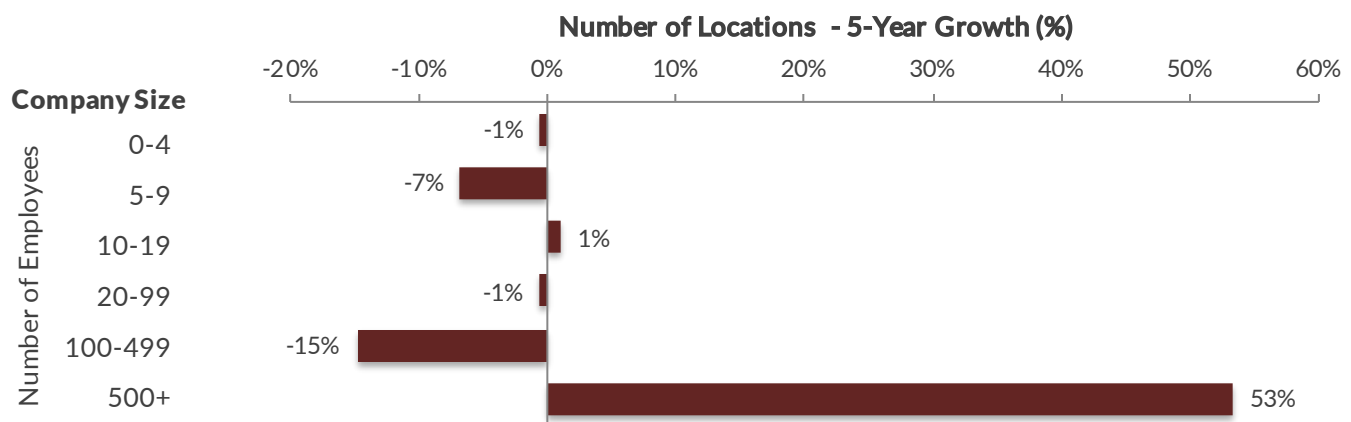
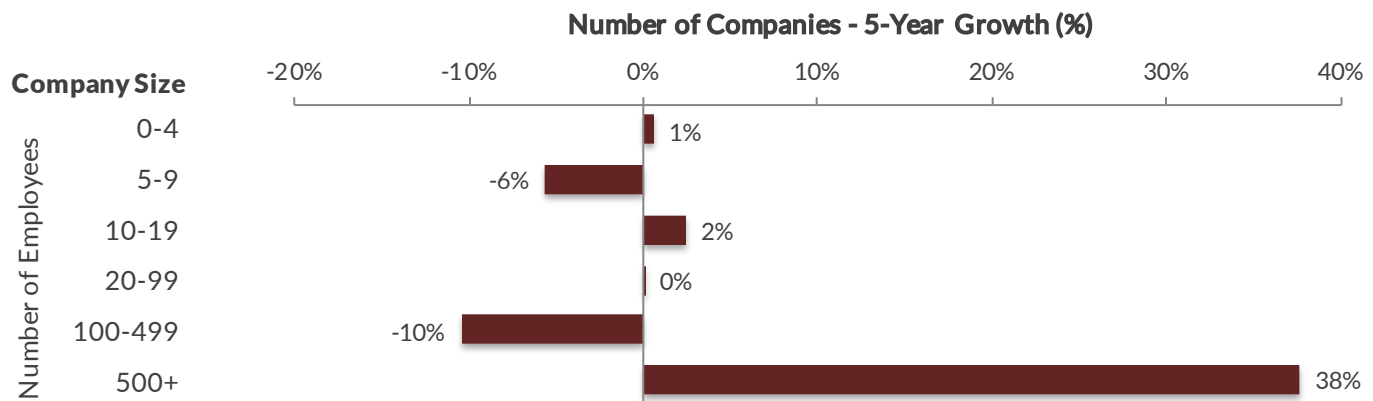
Below is the sales per company and location for the major manufacturing sectors.



## 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 5-year growth of companies, facilities and facilities per company by business size.

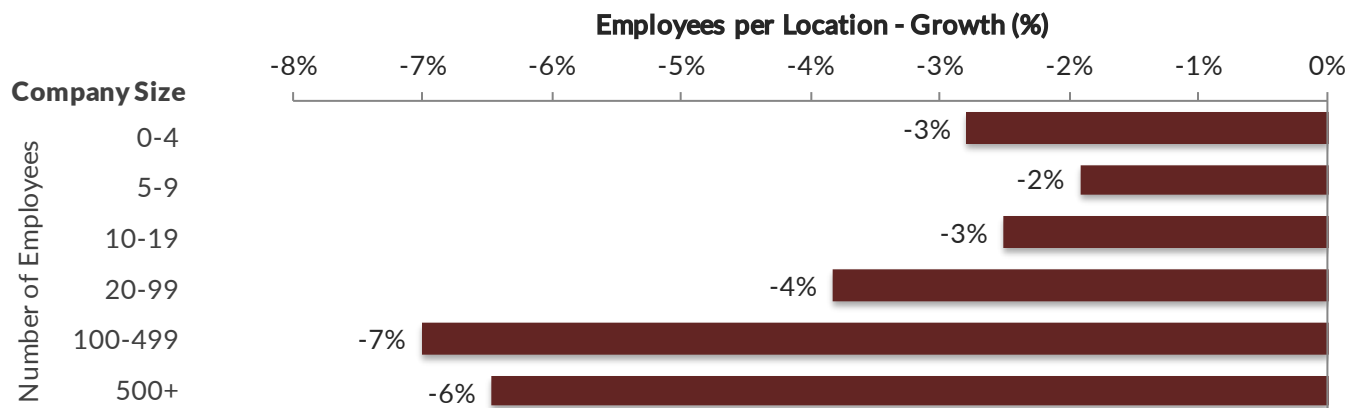
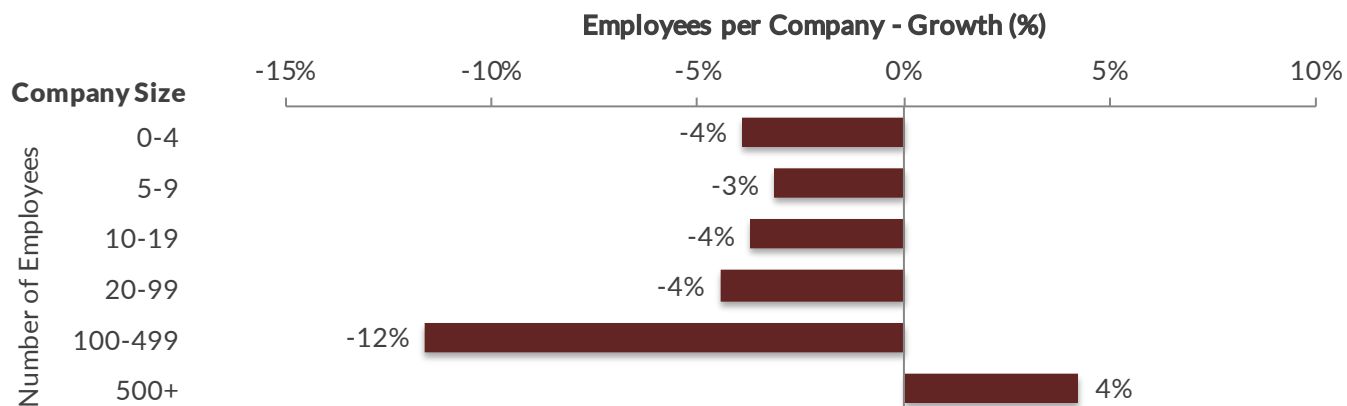
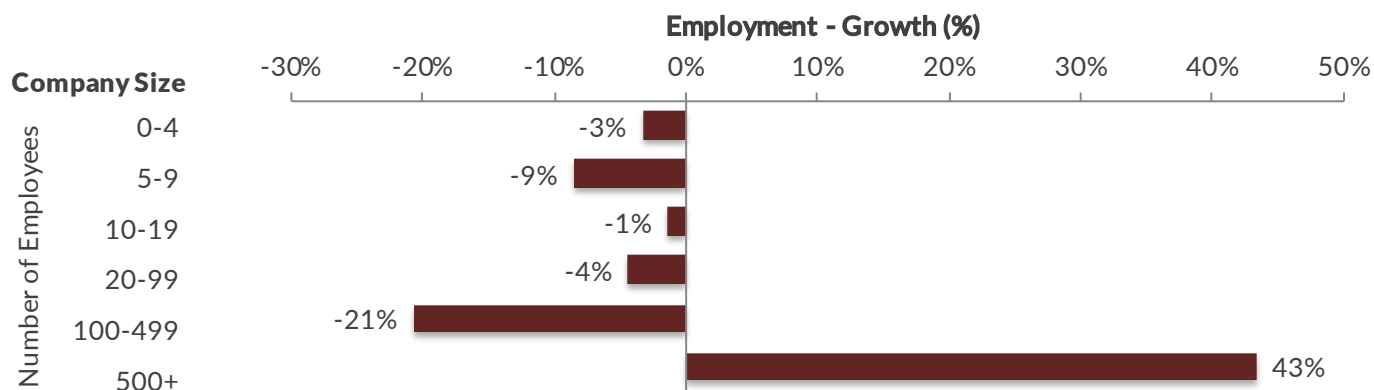
### Kitchen Cabinet & Countertop Manufacturin



## 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.

### Kitchen Cabinet & Countertop Manufacturing

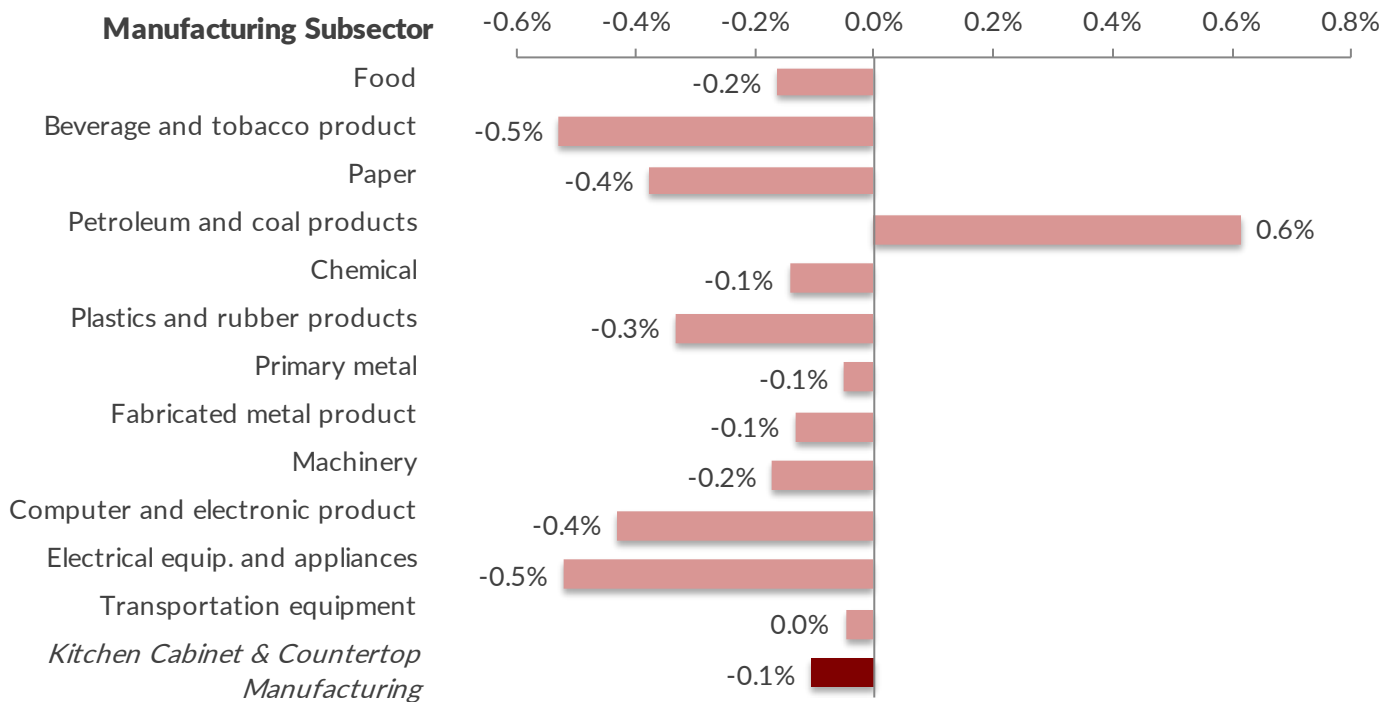


## Subsector Consolidation Analysis (1/2)

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.

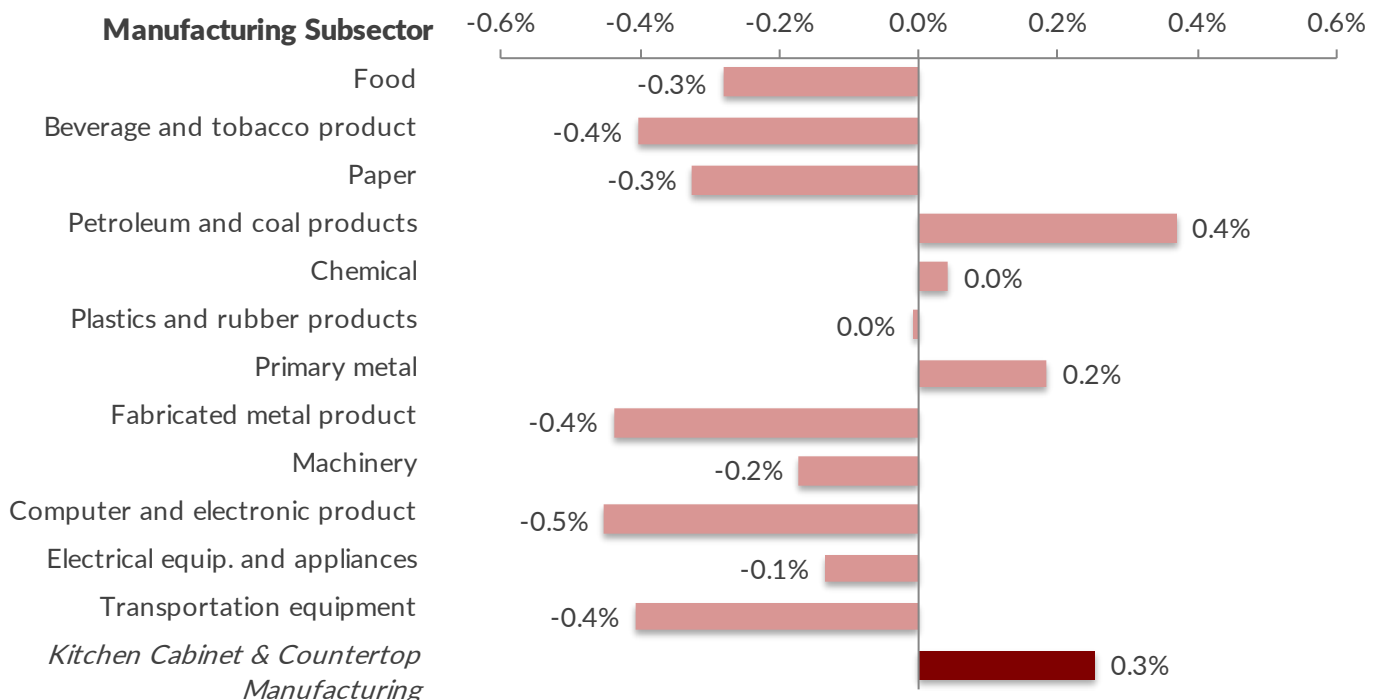
### 5-Yr. Growth in # of Companies

#### 5 -Year CAGR (%) - Number of Companies



### 5-Yr. Growth in # of Facilities

#### 5 -Year CAGR (%) - Number of Locations

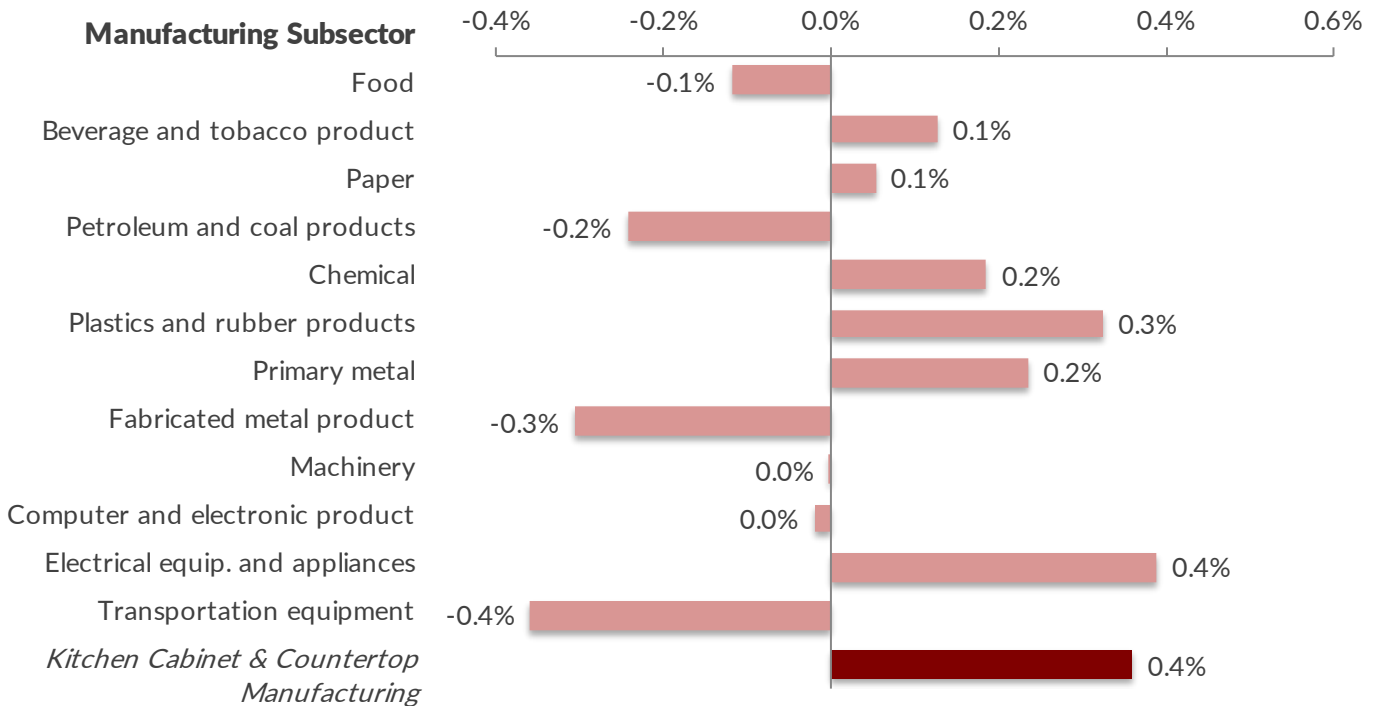


## Subsector Consolidation Analysis (2/2)

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

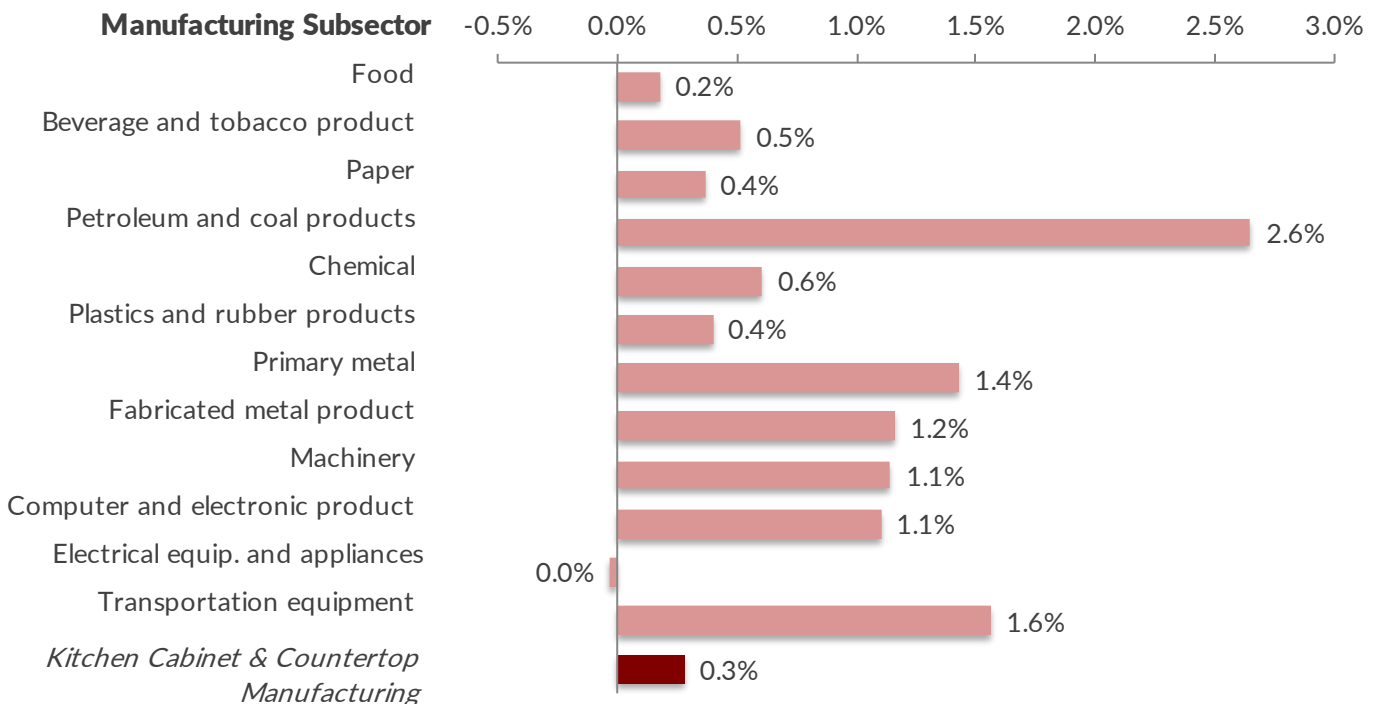
### 5-Yr. Growth - Facilities per Co.

### 5 -Year CAGR (%) - Locations per Company



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

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



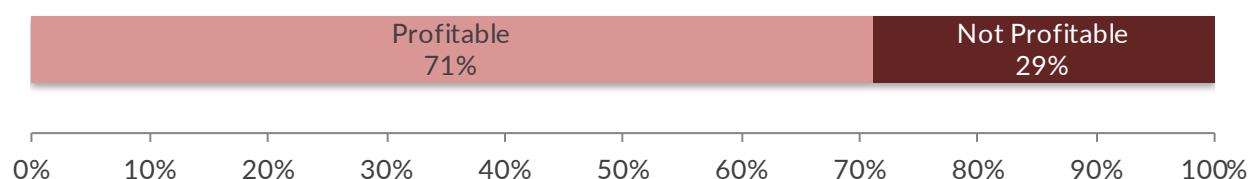
## **Section Two**

### **Costs, Capital & Profit Benchmarks**

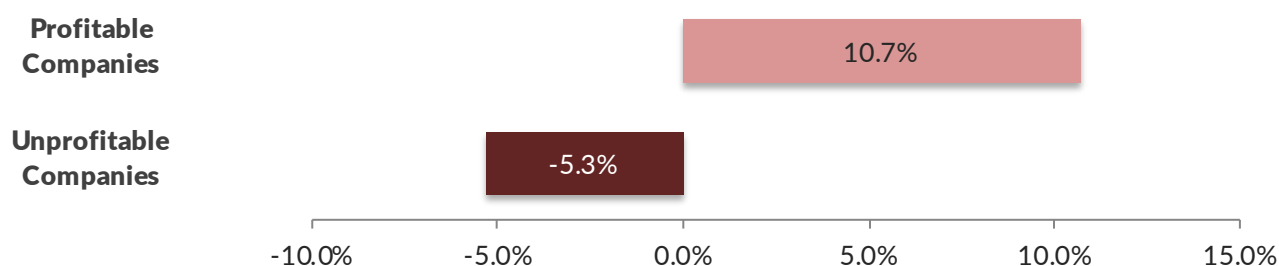
## Profitability & Financial Ratio Analysis

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.

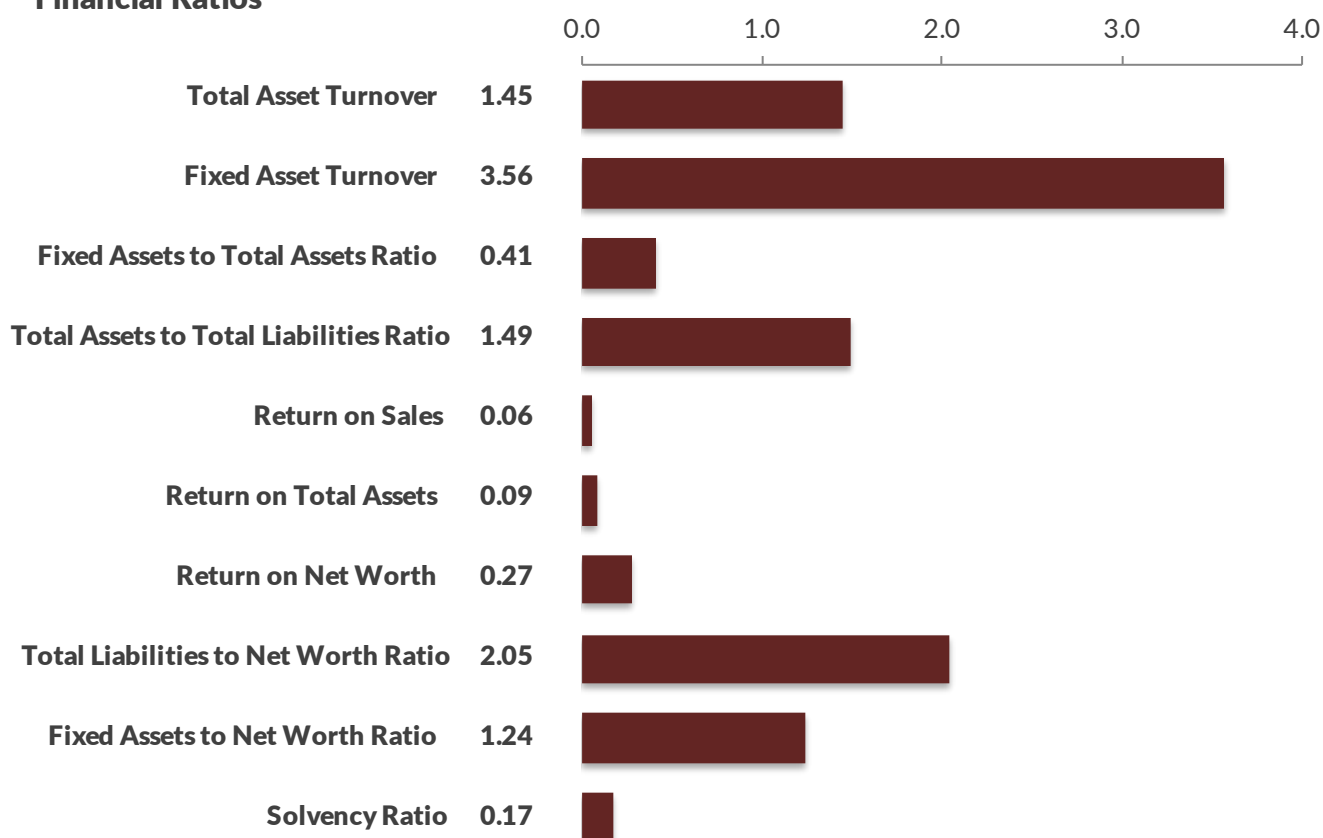
### Percent of Companies that are Profitable



### Average Net Income as a Percent of Revenues

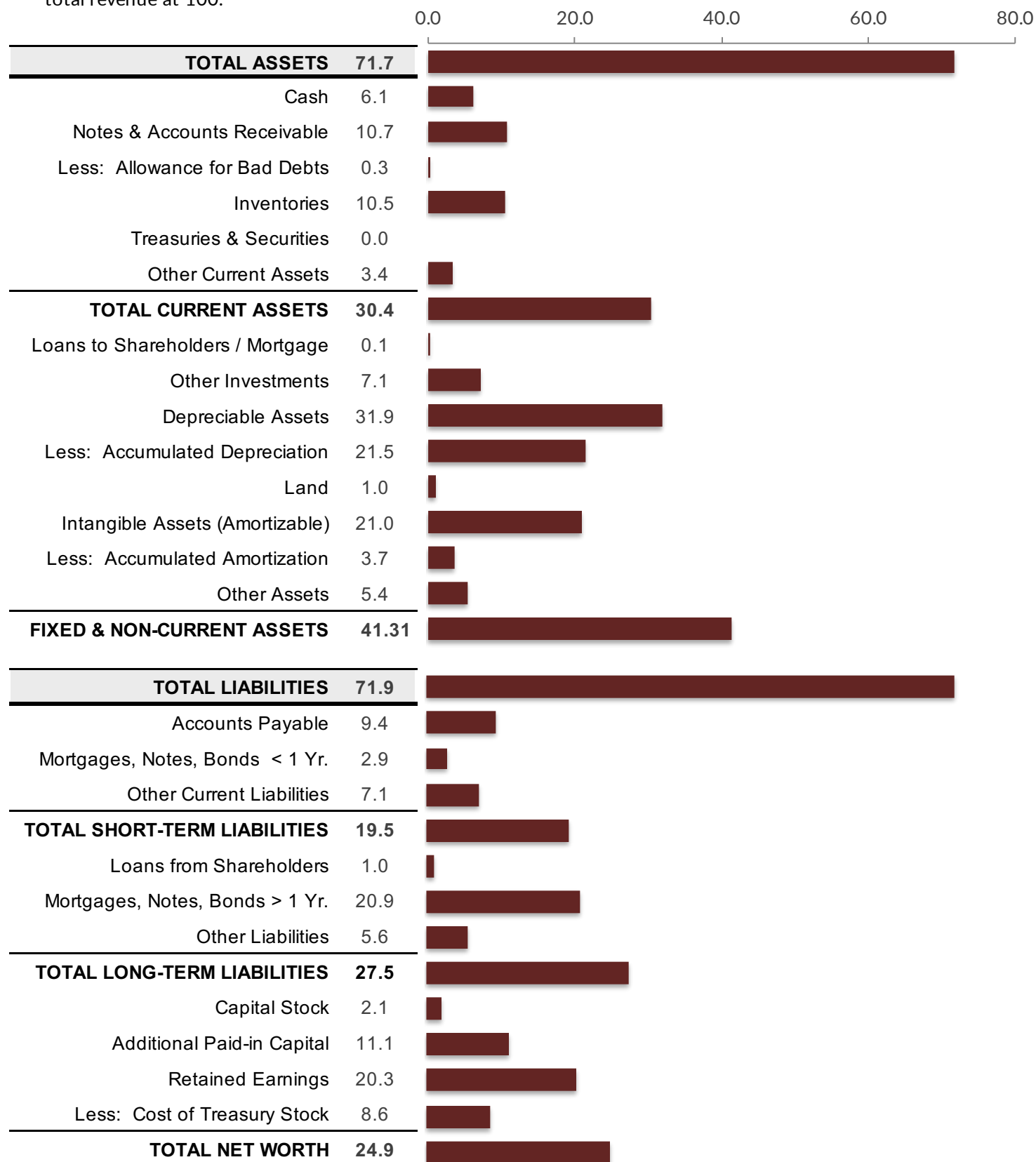


### Financial Ratios



## Balance Sheet Benchmarks - Assets, Liabilities & Equity

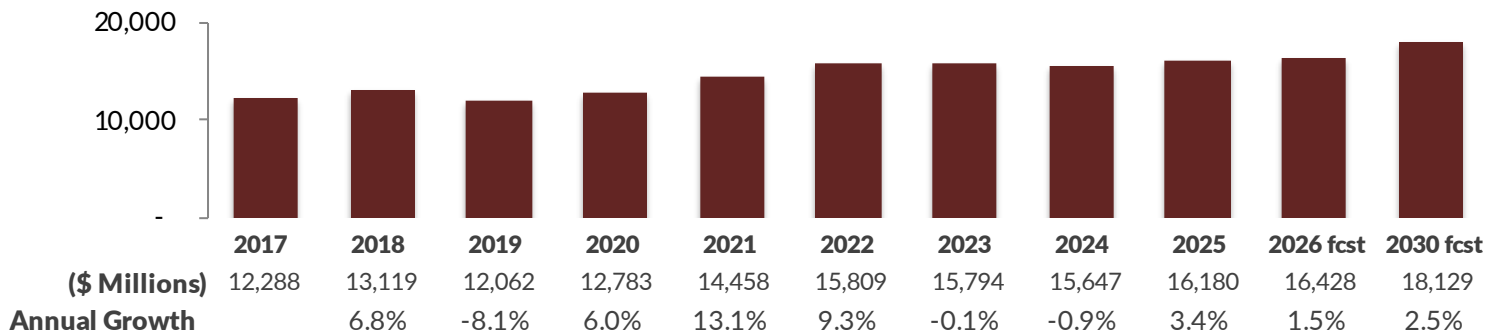
Below are balance sheet benchmarks with a breakdown of assets, liabilities & equity. All the benchmarks are indexed to total revenue at 100.



## Operating Expenses

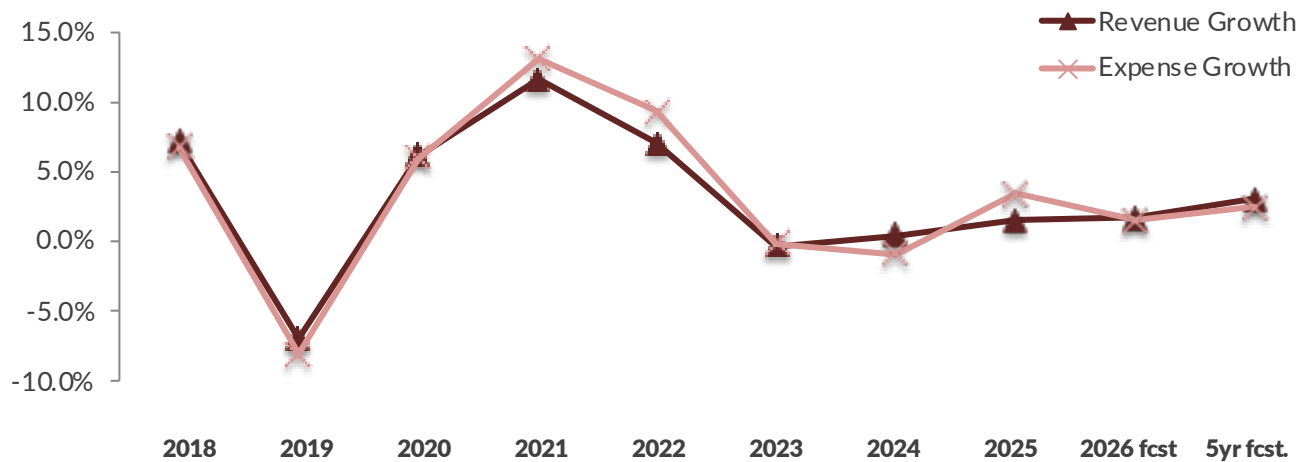
Below is total industry operating expense, industry revenue vs. industry opex growth, and opex as a percentage of revenue for Kitchen Cabinet & Countertop Manufacturing. The data sets include historicals and forecasts.

### Industry Operating Expenses

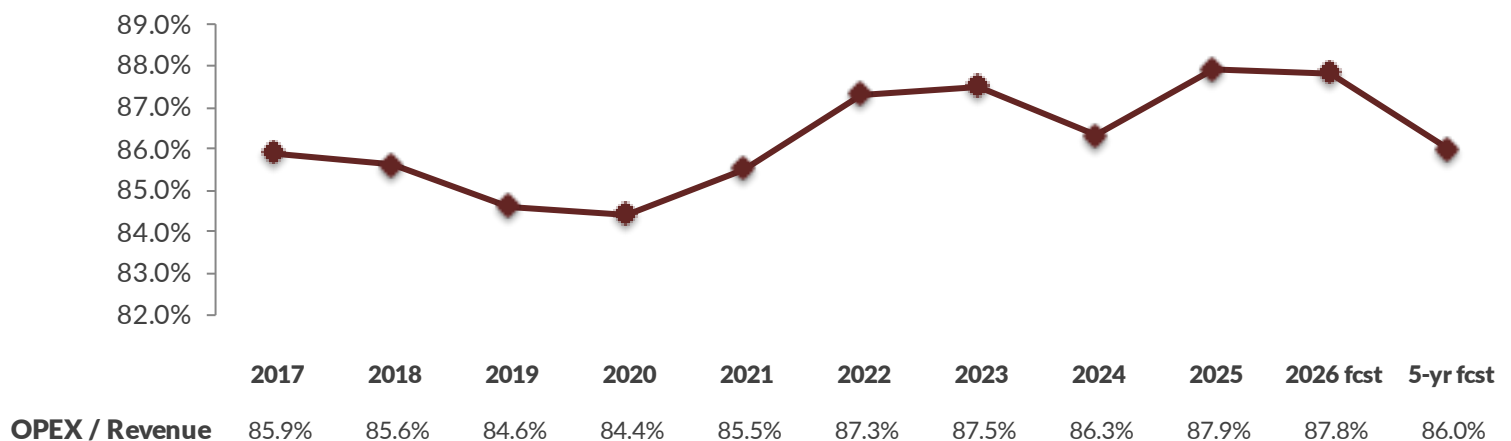


Compound Annual Growth Rate **0.8%** 3-Year **4.8%** 5-Year

### Industry Revenue vs. Operating Expense Growth



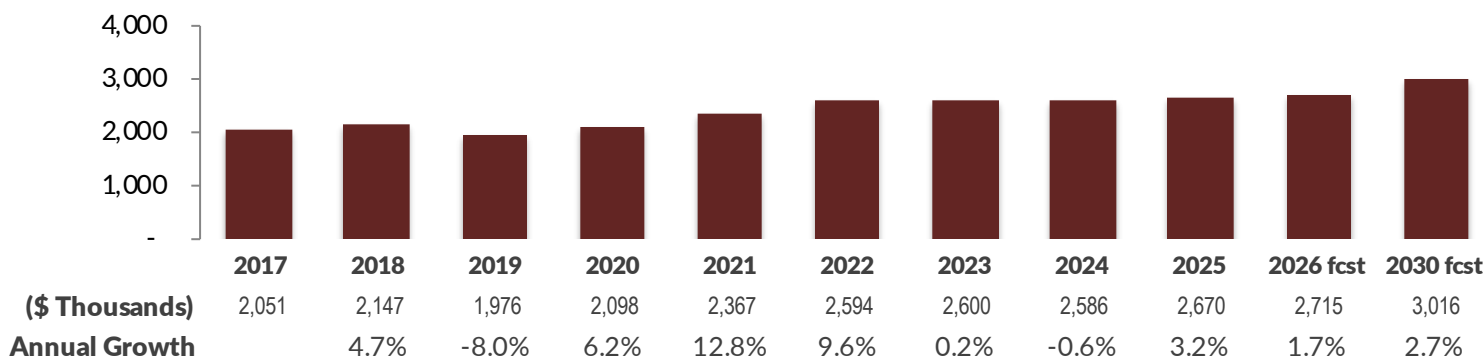
### Operating Expense as a Percent of Revenues



## Operating Expenses per Company & Facility

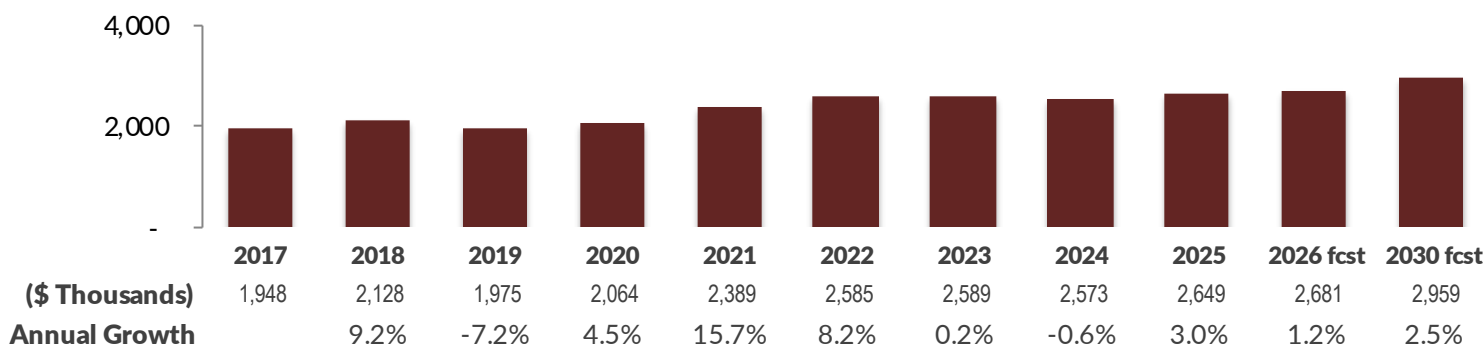
Given the dynamics of company and facility growth and consolidation in the industry, it is important to normalize operating expense growth by company and facility, which are below. This serves as a better benchmark for operating expense comparisons.

### Industry Operating Expenses per Company



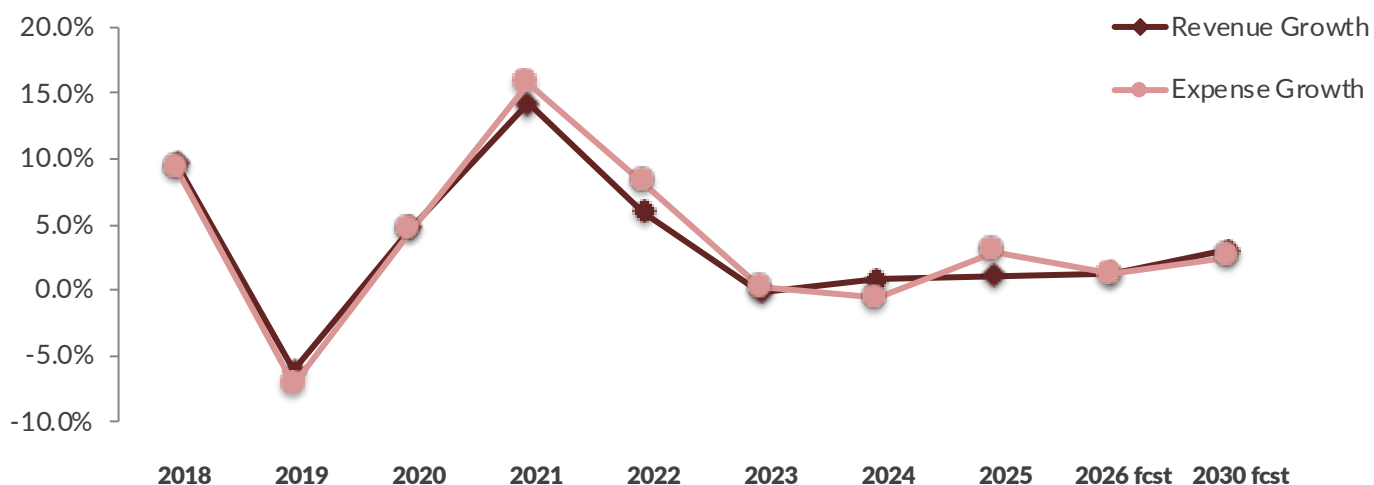
Compound Annual Growth Rate **1.0%** 3-Year **4.9%** 5-Year

### Industry Operating Expenses per Facility



Compound Annual Growth Rate **0.8%** 3-Year **5.1%** 5-Year

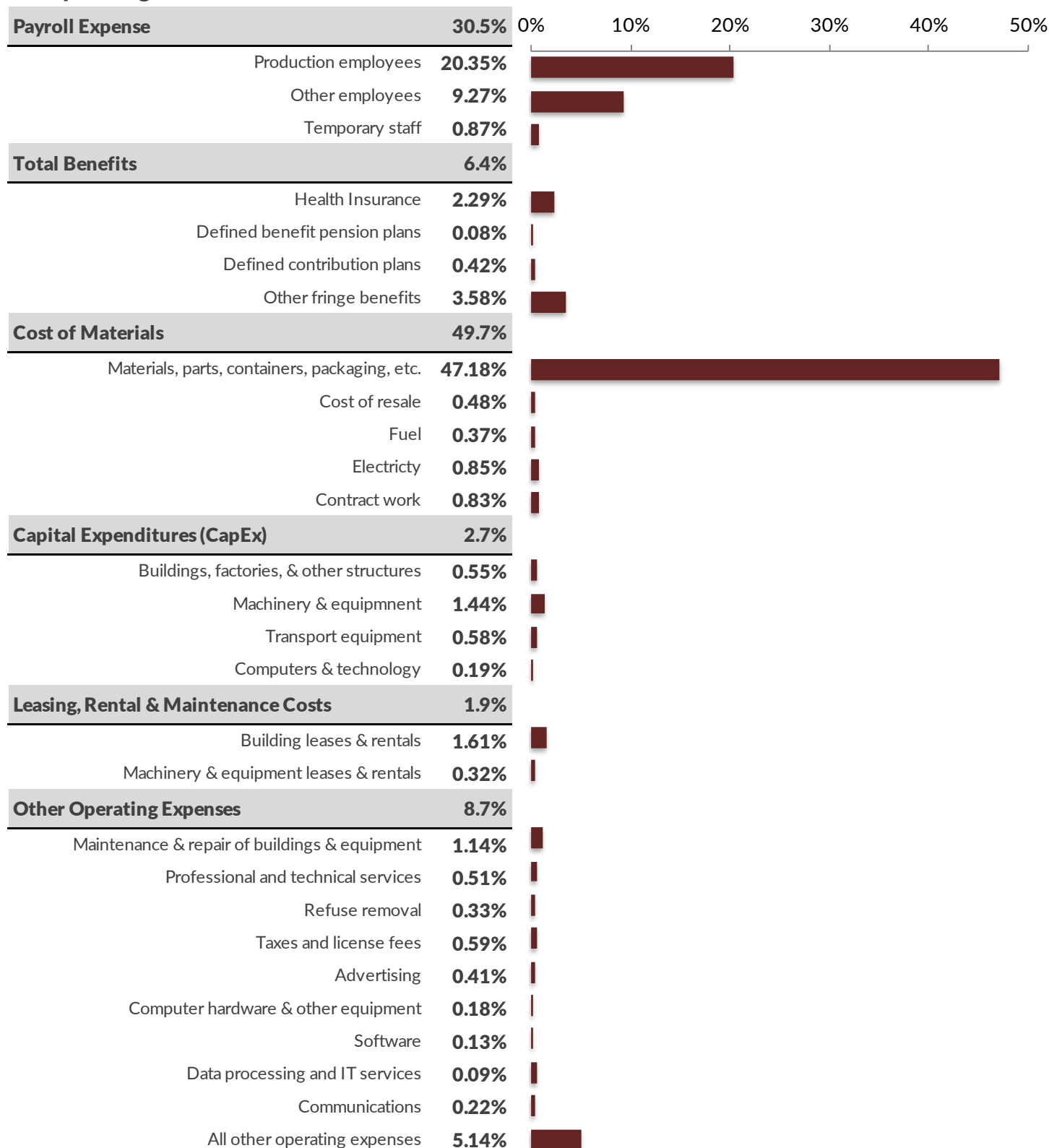
### Revenue Growth per Facility vs. Operating Expense Growth per Facility



## 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



## Production Materials Costs & Estimated Tariff Impact

Below is the top production material costs for Kitchen Cabinet & Countertop Manufacturing. The material costs are ranked ordered by percentage of total material costs.

### Industry Tariff Estimates

|                               |               |
|-------------------------------|---------------|
| Materials as a % of OPEX      | 47.2%         |
| Industry Material Costs       | \$7.4 billion |
| % of Materials Imported       | 31.9%         |
| Import Value                  | \$2.4 billion |
| Blended Tariff Rate           | 8.6%          |
| Total Industry Tariff Cost    | \$200 million |
| Tariff Cost as a % of Revenue | 1.1%          |

### Top Production Material Costs Analysis

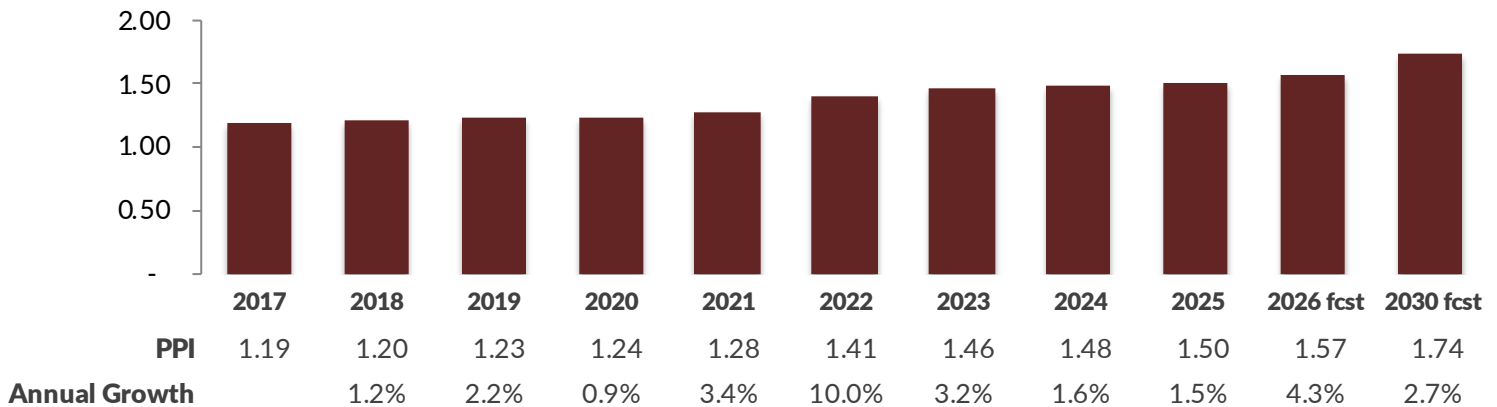
|                                                                                                                         | Material Cost % | Material Cost (\$B) | Est. Imports | Blended Tariff % | Tariff Cost (\$M) | % of Materials | Top Import Countries |
|-------------------------------------------------------------------------------------------------------------------------|-----------------|---------------------|--------------|------------------|-------------------|----------------|----------------------|
| Materials, ingredients, containers, and supplies                                                                        | 16.5%           | \$ 1.22             | 25%          | 8%               | \$ 24             | 2.0%           | China Vietnam Mexico |
| Cost of all other materials and components, parts, containers, and supplies consumed                                    | 15.4%           | \$ 1.14             | 25%          | 8%               | \$ 22             | 2.0%           | China Vietnam Mexico |
| Hardwood and softwood veneer and plywood                                                                                | 11.9%           | \$ 0.88             | 35%          | 8%               | \$ 25             | 2.8%           | Canada Brazil Russia |
| Reconstituted wood products, including particleboard, waferboard, hardboard, MDF, and Rough and dressed hardwood lumber | 9.4%            | \$ 0.70             | 30%          | 12%              | \$ 25             | 3.6%           | Canada China Brazil  |
|                                                                                                                         | 7.1%            | \$ 0.52             | 30%          | 7%               | \$ 11             | 2.2%           | Canada Brazil Russia |
| Wood cut stock and dimension                                                                                            | 7.0%            | \$ 0.52             | 25%          | 7%               | \$ 9              | 1.7%           | Canada Russia Brazil |
| Plastics products (including packaging, foam products, film, sheet, rod, tube, fabricated                               | 6.9%            | \$ 0.51             | 30%          | 8%               | \$ 12             | 2.4%           | China Mexico Germany |
| Furniture frames and parts (excluding metal)                                                                            | 6.9%            | \$ 0.51             | 60%          | 10%              | \$ 30             | 5.9%           | China Vietnam Mexico |
| Paints, varnishes, stains, lacquers, shellacs, japans, enamels, and allied products                                     | 6.5%            | \$ 0.48             | 30%          | 11%              | \$ 15             | 3.2%           | China Germany India  |
| Hardware (builder's, vehicle, furniture, luggage, etc.), excluding aircraft metal hardware                              | 6.2%            | \$ 0.45             | 50%          | 10%              | \$ 22             | 4.8%           | China Mexico Taiwan  |
| Paper and paperboard products                                                                                           | 6.1%            | \$ 0.45             | 30%          | 6%               | \$ 8              | 1.7%           | Canada Brazil China  |

## 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.

### Kitchen Cabinet & Countertop Manufacturing Producer Pricing Index

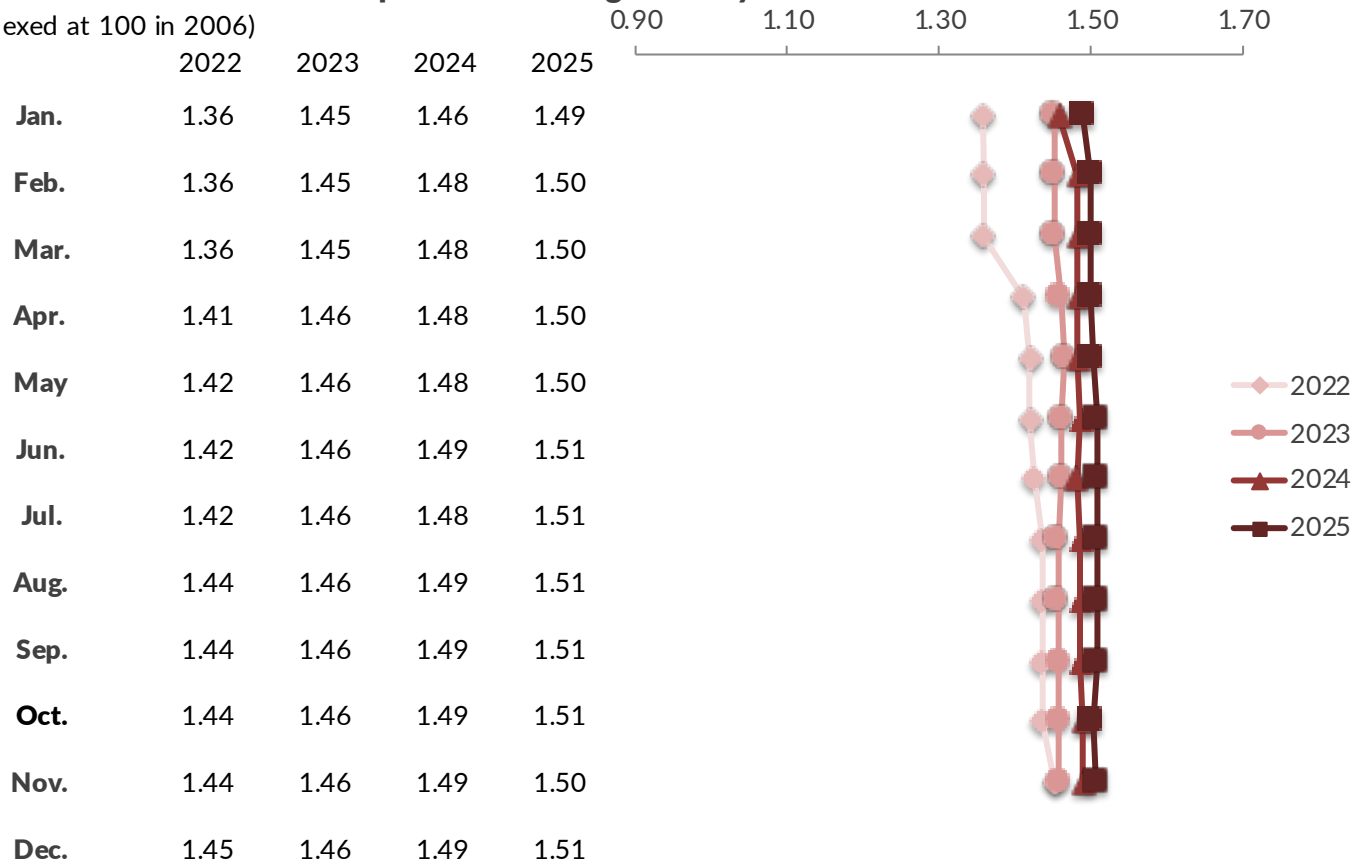
(Indexed at 100 in 2006)



Compound Annual Growth Rate **2.1%** 3-Year **3.9%** 5-Year

### Kitchen Cabinet & Countertop Manufacturing Industry PPI

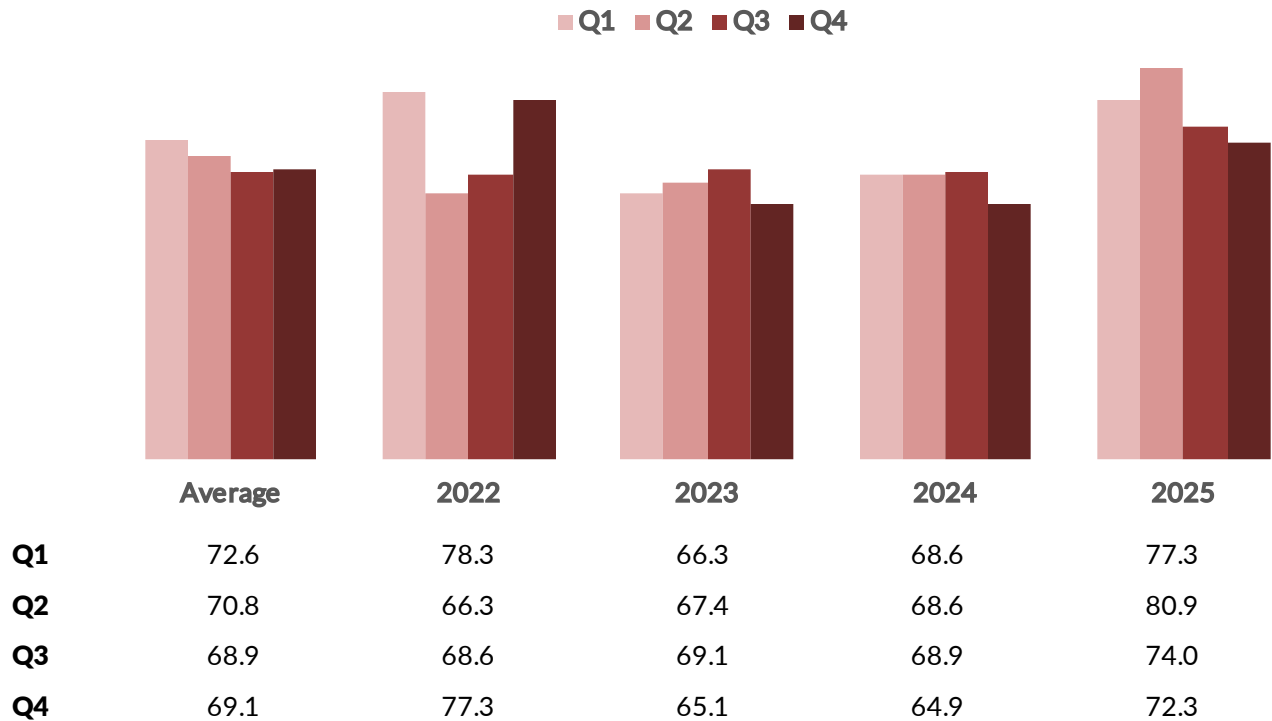
(Indexed at 100 in 2006)



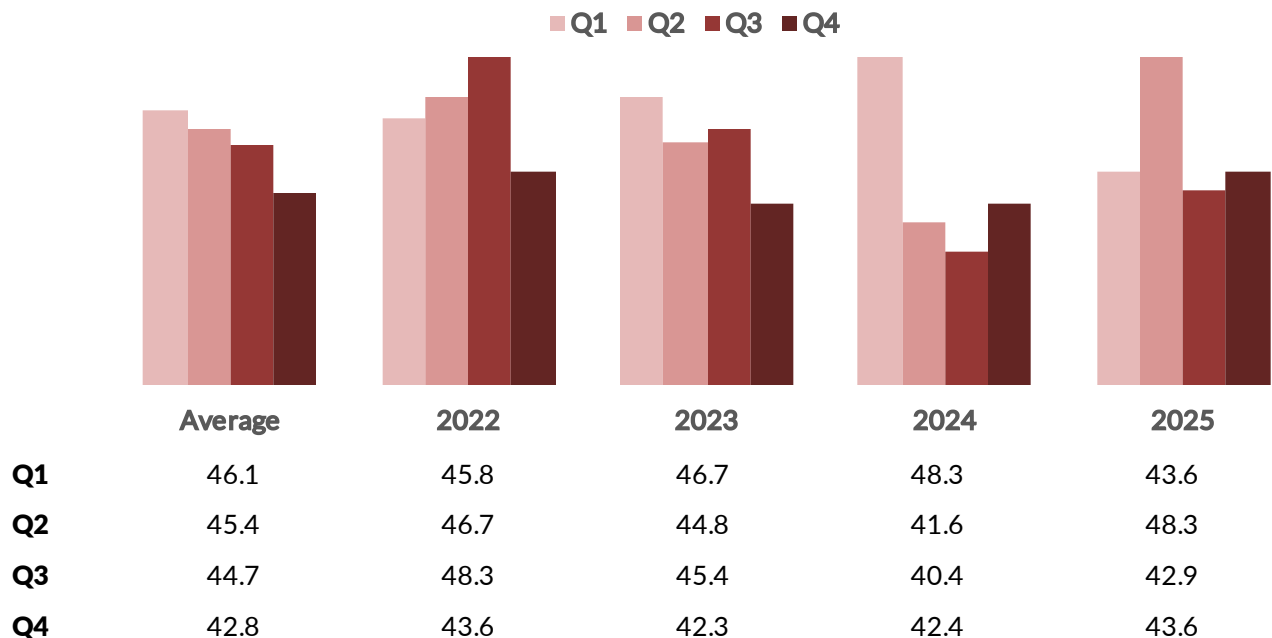
## Plant Utilization & Hours

Below is the historic plant utilization and hours by quarter from 2022-2025.

### Plant Utilization (% of Capacity)



### Plant Operational Hours per Week

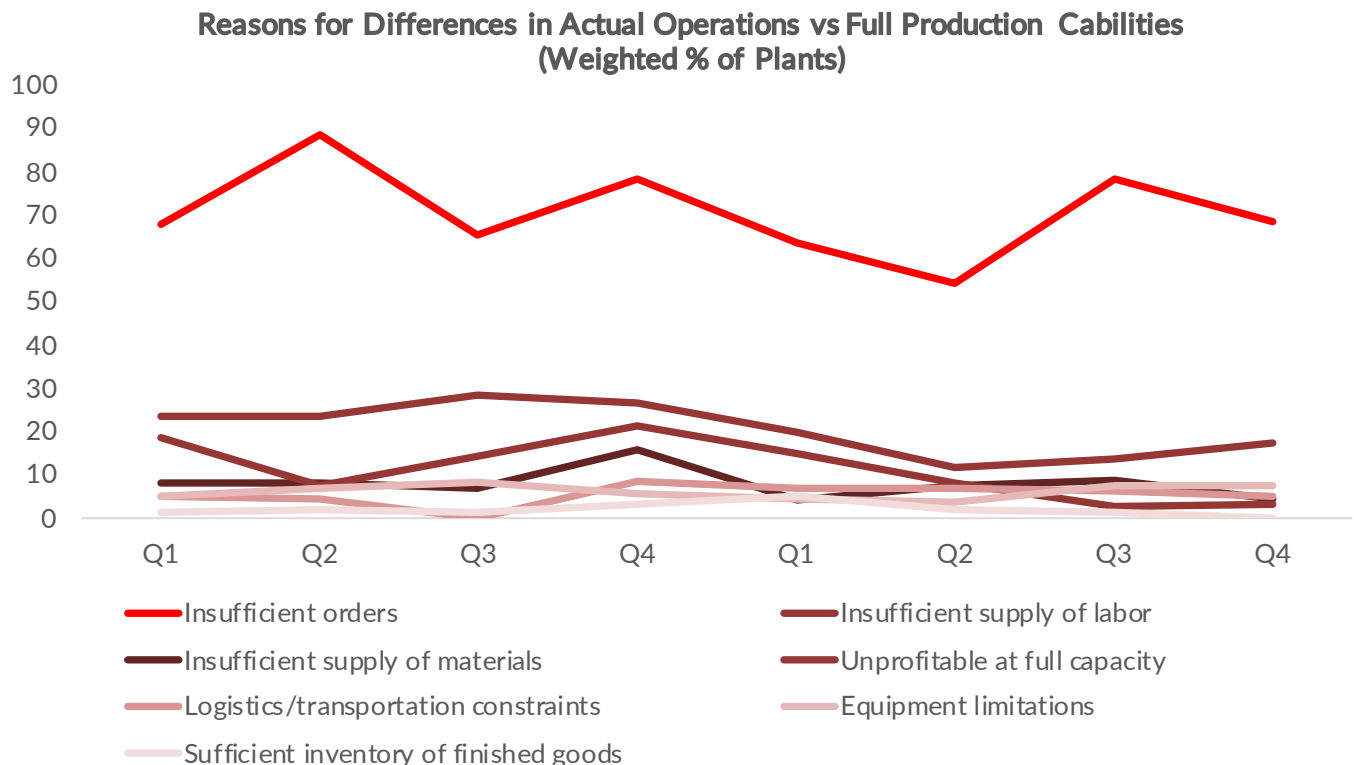


## Plant Non-Full Production Utilization Survey

Below represents the percentage of weighted number of plants that responded to reasons for difference in actual operations vs. full production capability. The data is for Furniture and Related Product Manufacturing which Kitchen Cabinet & Countertop Manufacturing is a subcategory of.

### Reasons for Differences in Actual Operations vs Full Production Capabilities (Weighted % of Plants)

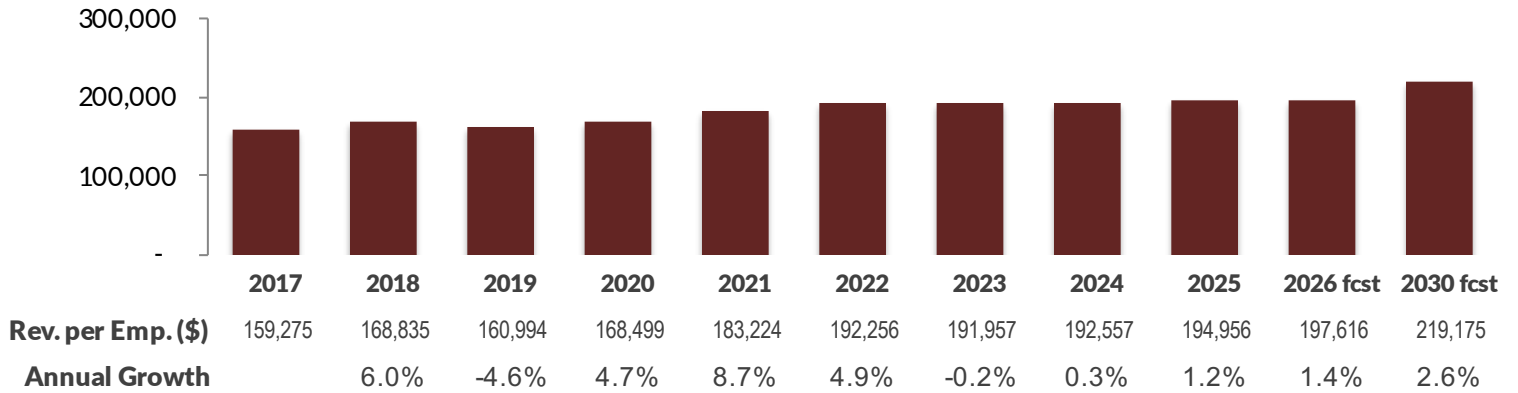
|                                               | 2024 |      |      |      | 2025 |      |      |      |
|-----------------------------------------------|------|------|------|------|------|------|------|------|
|                                               | Q1   | Q2   | Q3   | Q4   | Q1   | Q2   | Q3   | Q4   |
| <b>Insufficient orders</b>                    | 67.7 | 88.5 | 65.5 | 78.5 | 63.3 | 54.2 | 78.5 | 68.6 |
| <b>Insufficient supply of labor</b>           | 23.8 | 23.3 | 28.4 | 26.3 | 20.0 | 11.7 | 13.6 | 17.6 |
| <b>Insufficient supply of materials</b>       | 8.3  | 8.3  | 7.1  | 15.8 | 4.2  | 7.3  | 8.5  | 4.4  |
| <b>Unprofitable at full capacity</b>          | 18.5 | 7.4  | 14.2 | 21.3 | 14.8 | 7.9  | 2.7  | 3.2  |
| <b>Logistics/transportation constraints</b>   | 5.0  | 4.5  | 0.0  | 8.5  | 7.0  | 6.8  | 6.0  | 5.0  |
| <b>Equipment limitations</b>                  | 4.8  | 6.9  | 8.3  | 5.5  | 4.5  | 3.7  | 7.7  | 7.3  |
| <b>Sufficient inventory of finished goods</b> | 1.1  | 2.0  | 1.2  | 3.3  | 5.1  | 2.1  | 1.1  | 0.0  |



## Employee Productivity & Industry Employment

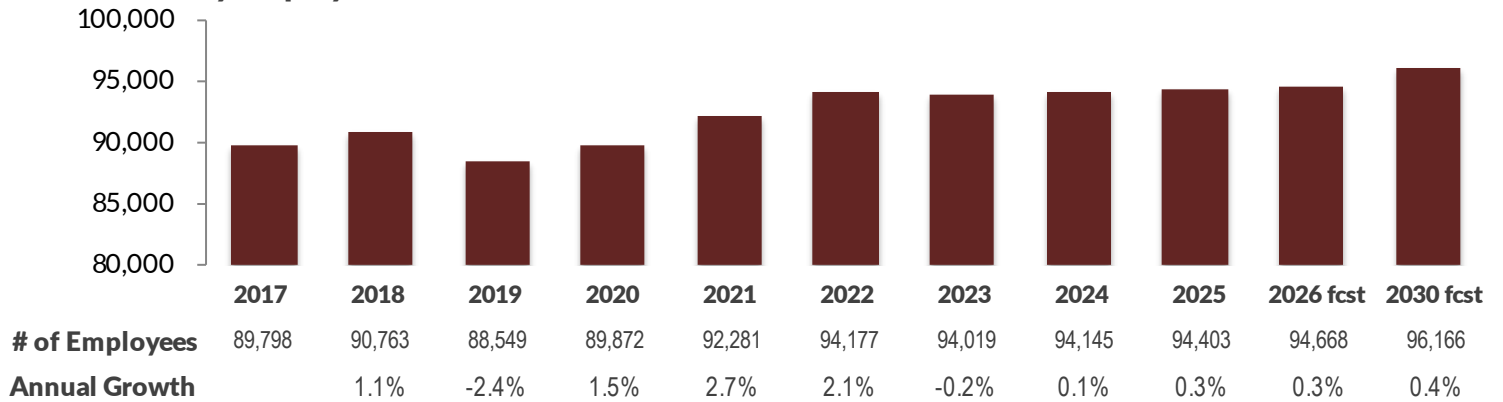
Below are data sets on productivity (revenue per employee), total industry employees, and employees per company. Each data set includes historicals and forecasts.

### Productivity - Revenue (output) per Employee



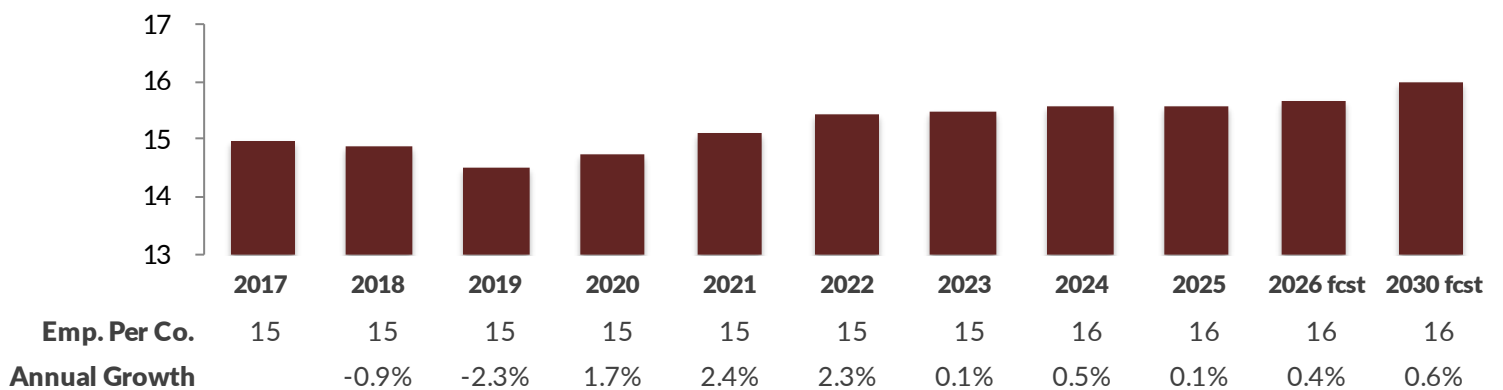
Compound Annual Growth Rate **0.5%** 3-Year **3.0%** 5-Year

### Total Industry Employees



Compound Annual Growth Rate **0.1%** 3-Year **1.0%** 5-Year

### Employees per Company

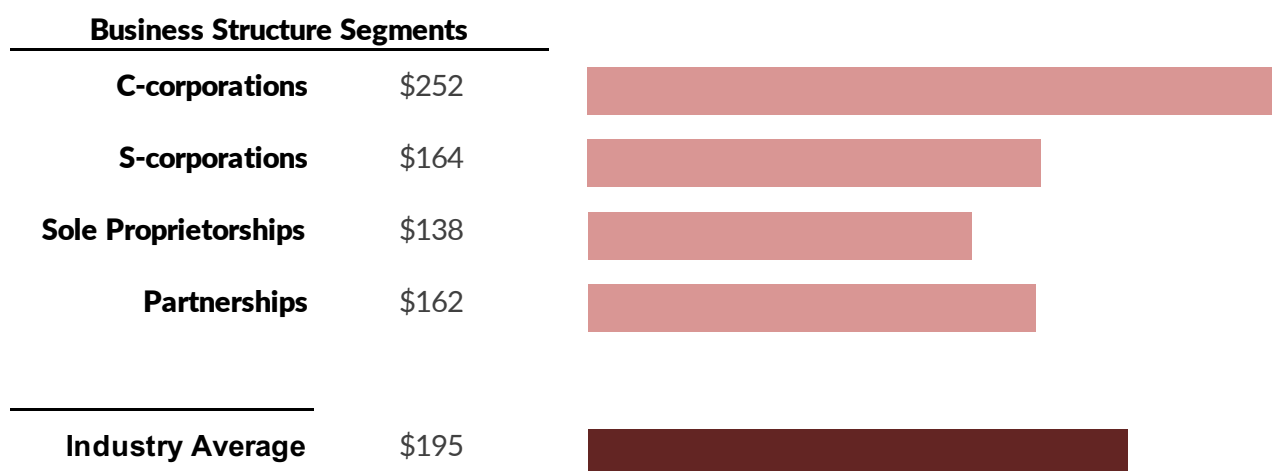
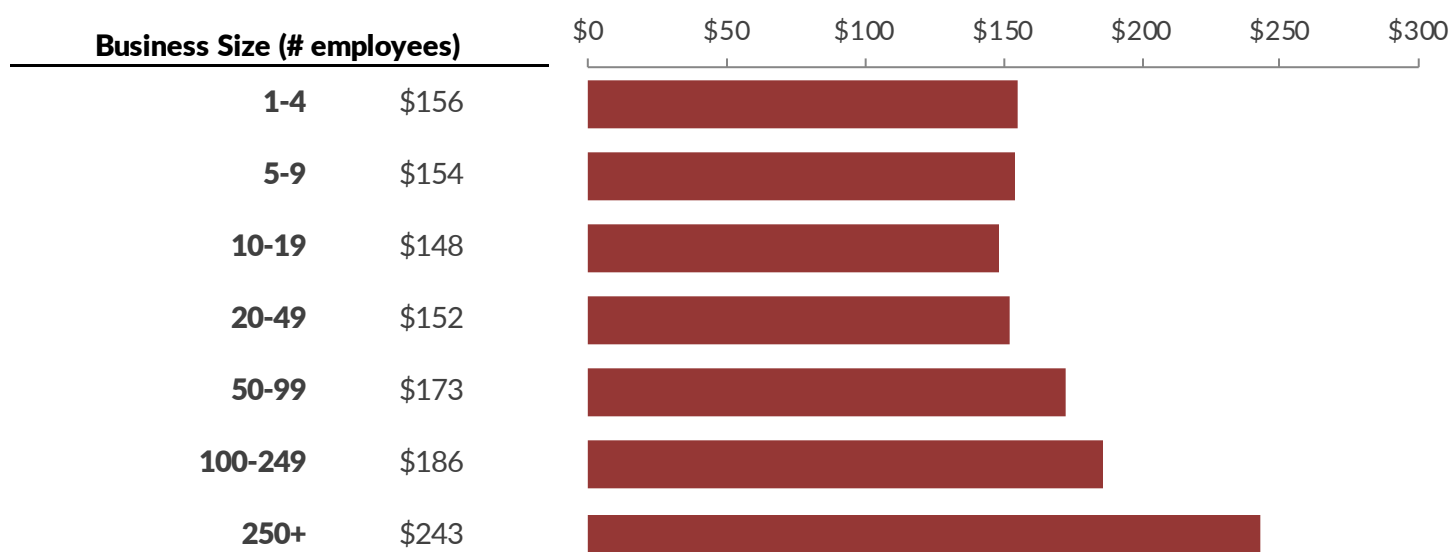
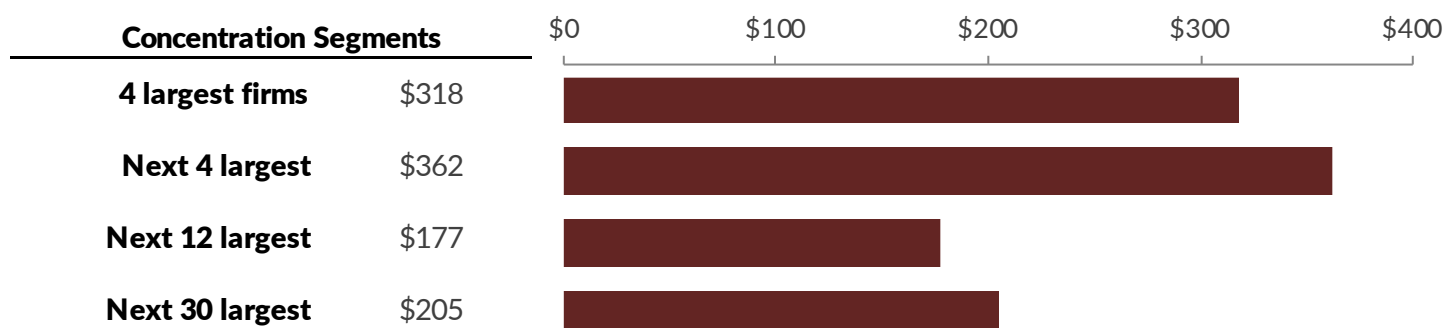


Compound Annual Growth Rate **0.3%** 3-Year **1.1%** 5-Year

## Employee Productivity by Segments

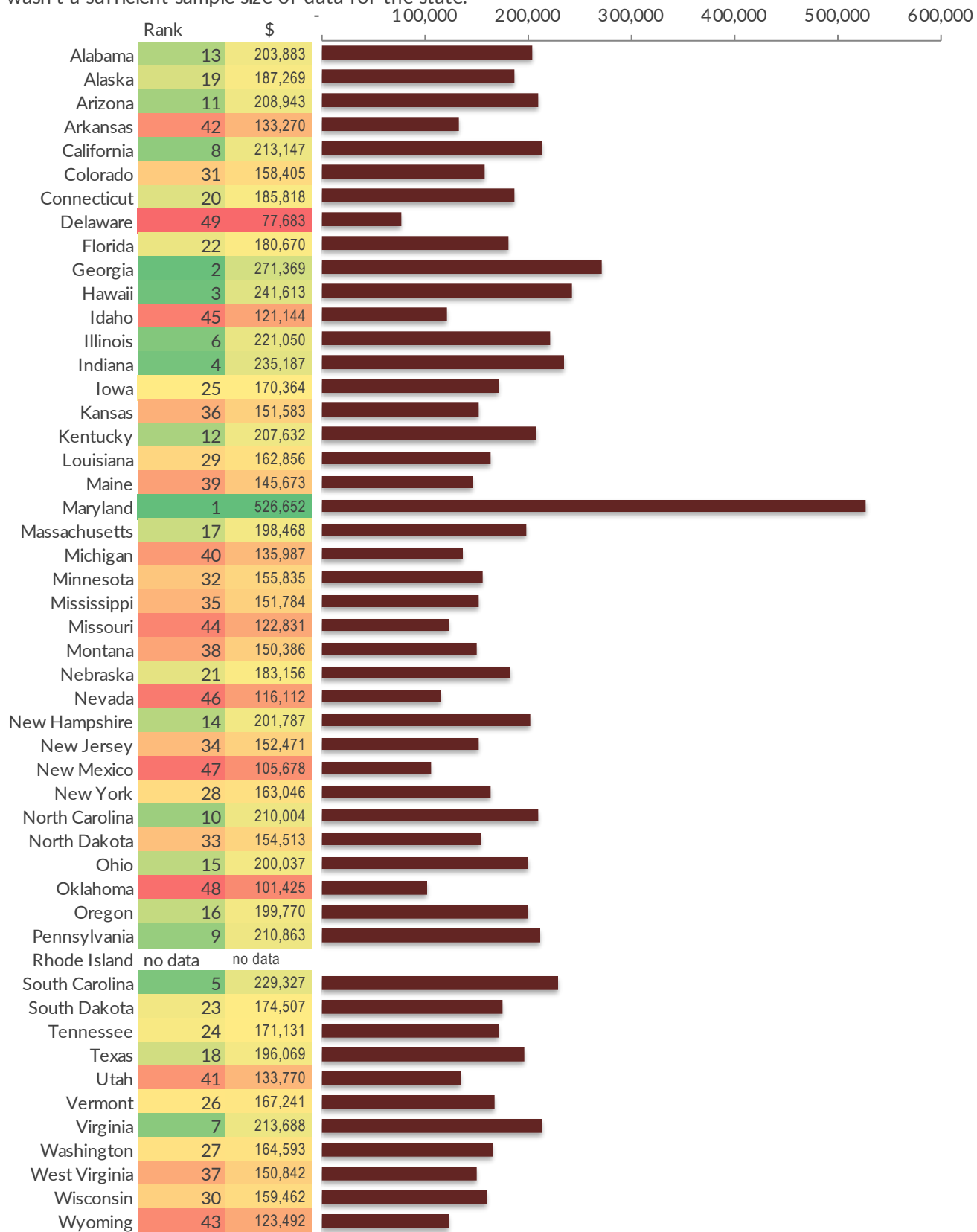
Below are employee productivity (i.e., revenue per employee) statistics for various industry segmentations including concentration, business size by employees, and business structure.

All figures in \$ thousands



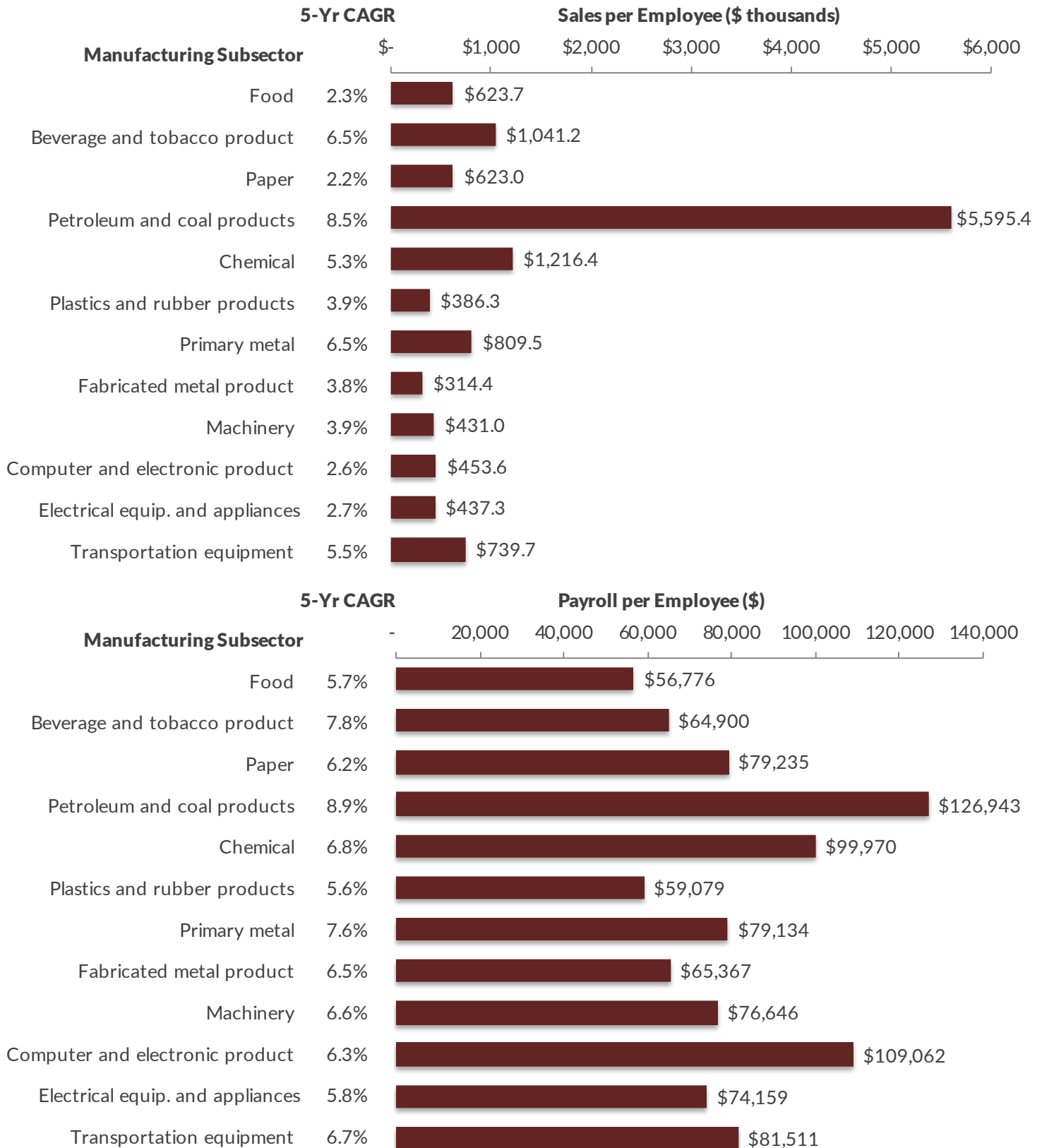
## Productivity by State - Revenue (output) per Employee

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.



## Manufacturing Sectors Sales & Payroll per Employee

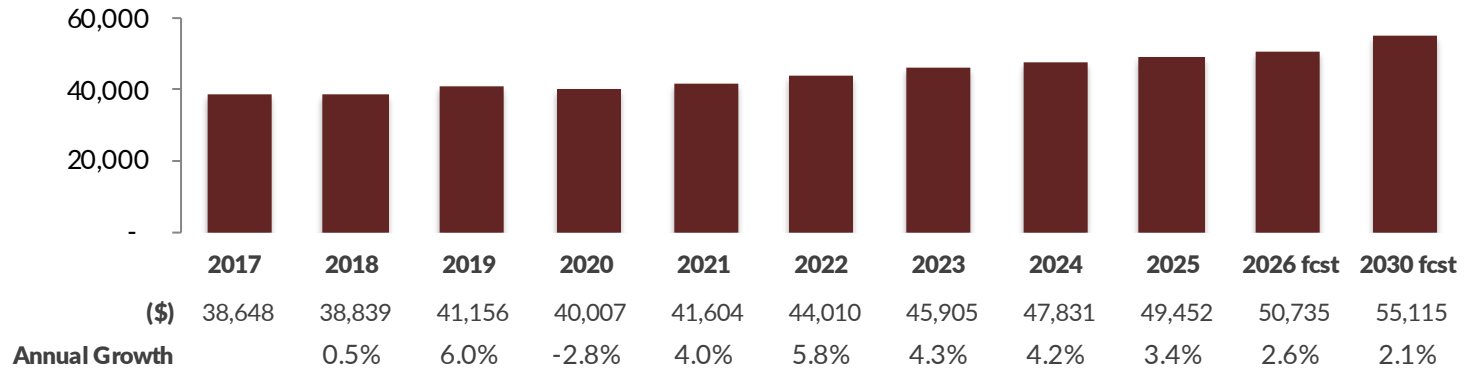
Below is the sales and payroll per employee for the major manufacturing sectors.



## Industry Payroll

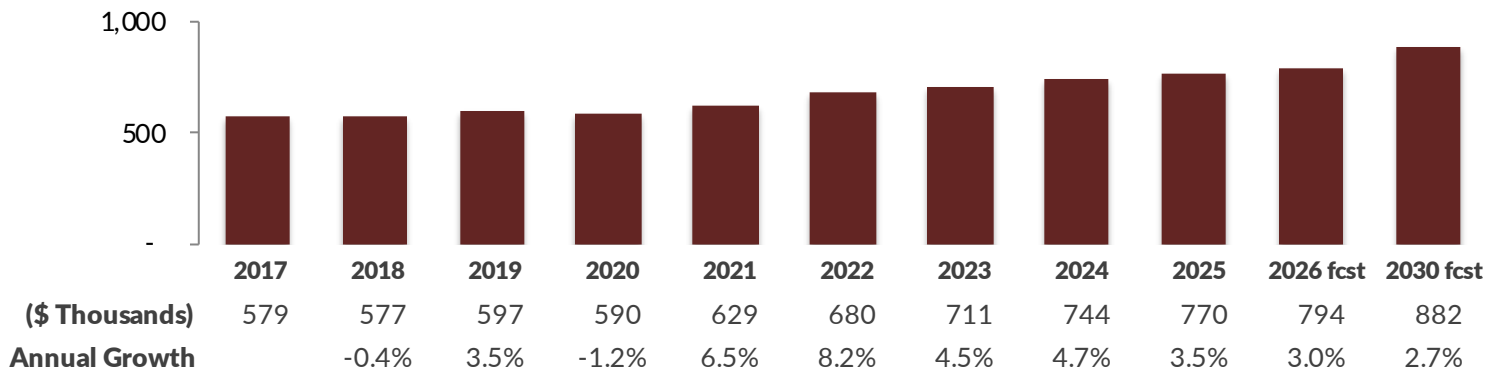
One of the consistently difficult strategic questions for every company is "are we paying our people the right amount?" In the next sections, we'll tackle this question from many different angles. The first benchmarks below cover payroll per employee, company and facility. In particular, payroll per 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



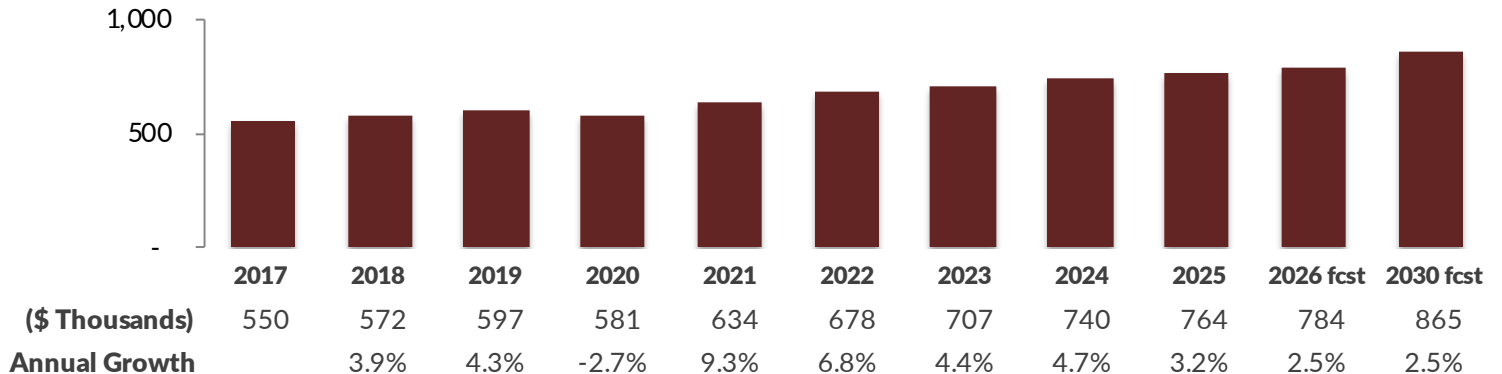
Compound Annual Growth Rate **4.0%** 3-Year **4.3%** 5-Year

### Payroll per Company



Compound Annual Growth Rate **4.2%** 3-Year **5.5%** 5-Year

### Payroll per Facility

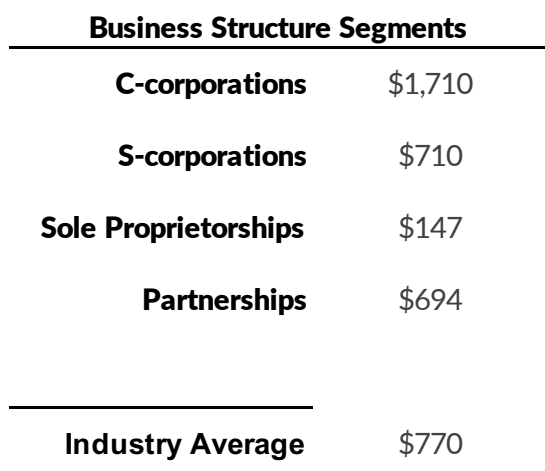
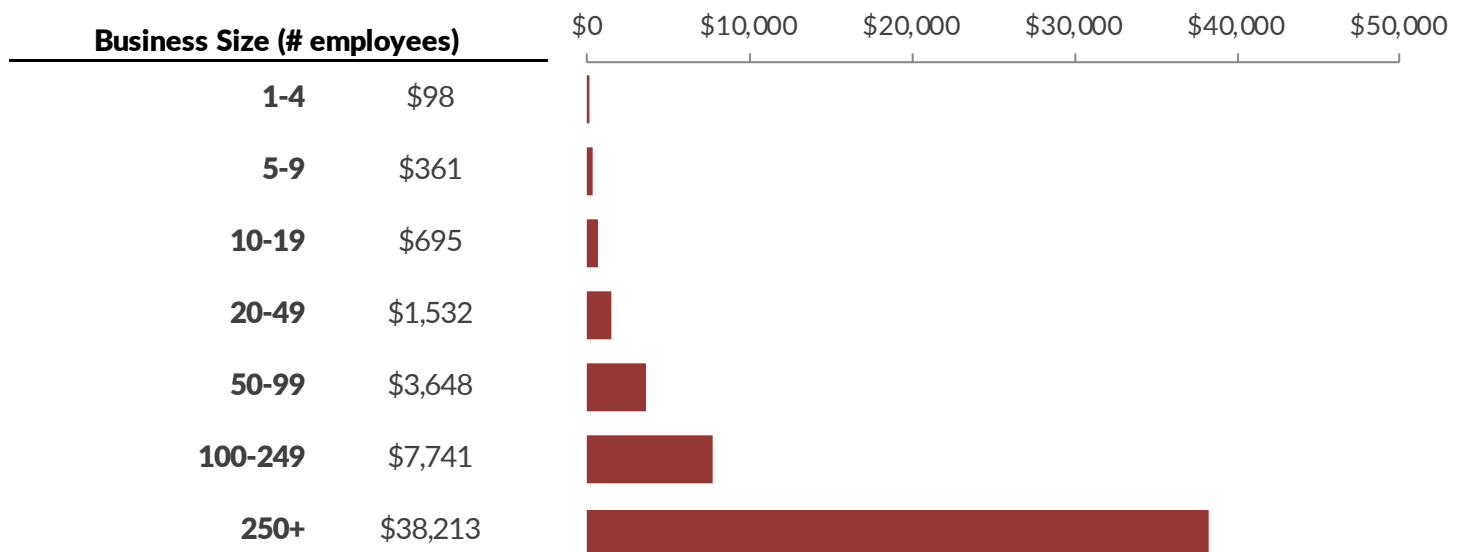
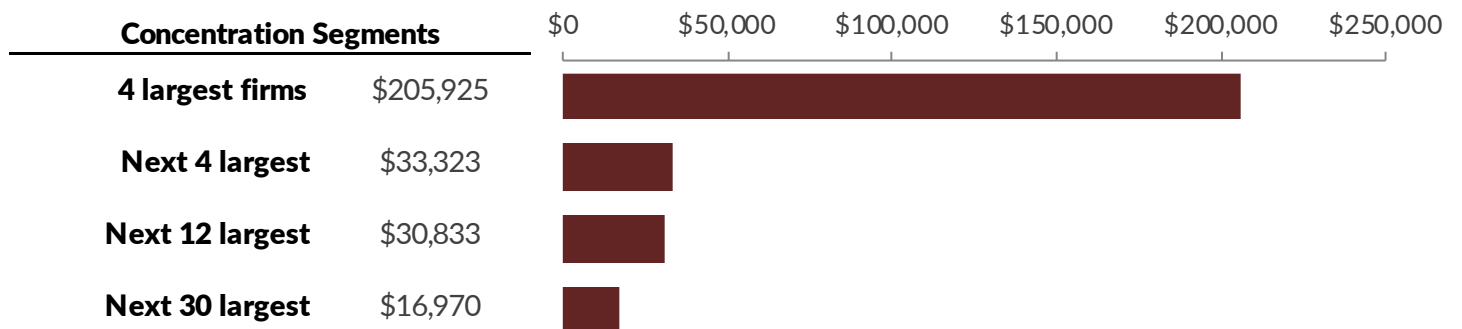


Compound Annual Growth Rate **4.1%** 3-Year **5.7%** 5-Year

## Payroll per Company by Segments

Below are payroll per company statistics for various industry segmentations including concentration, business size by employees, and business structure..

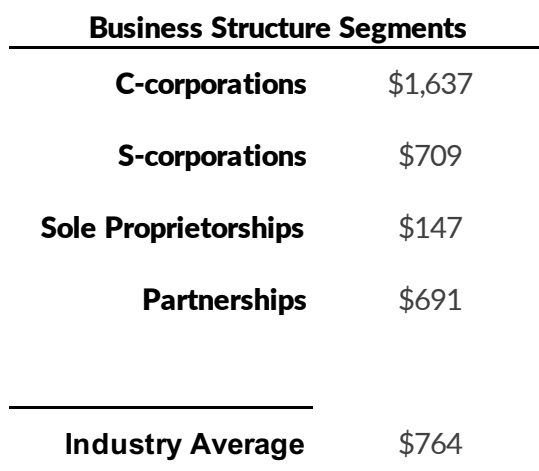
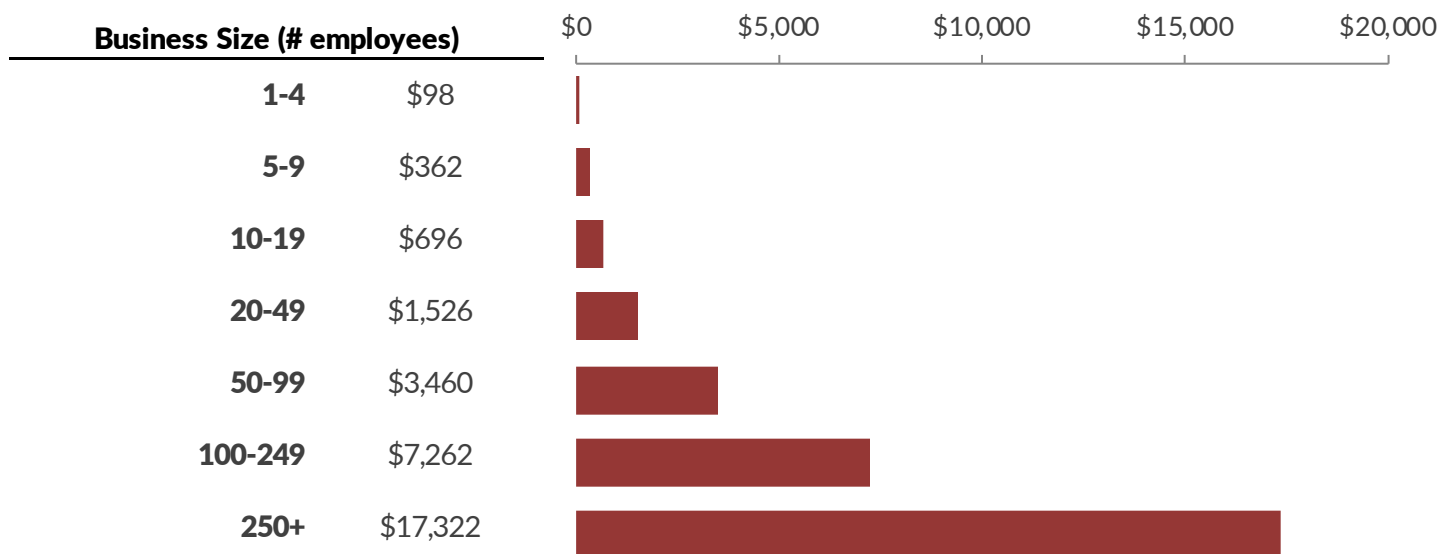
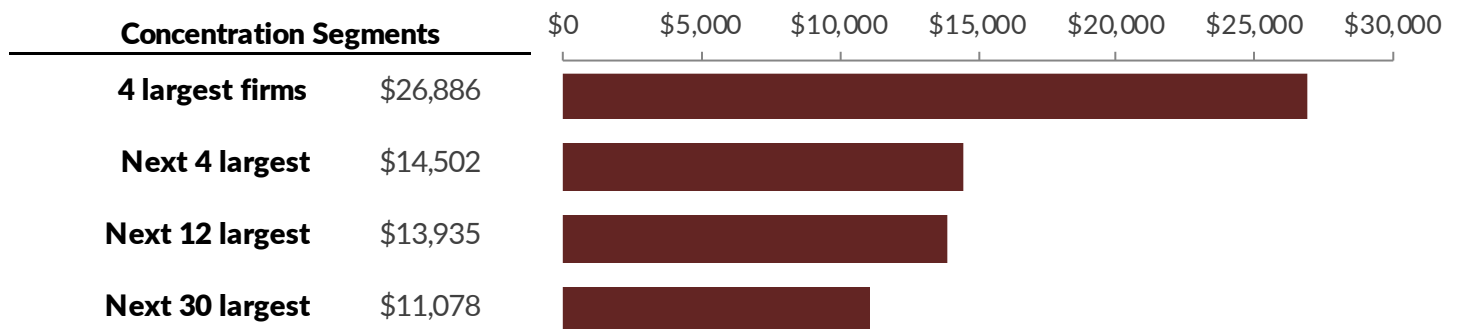
All figures in \$000s



## Payroll per Facility by Segments

Below are payroll per facility statistics for various industry segmentations including concentration, business size by employees, and business structure.

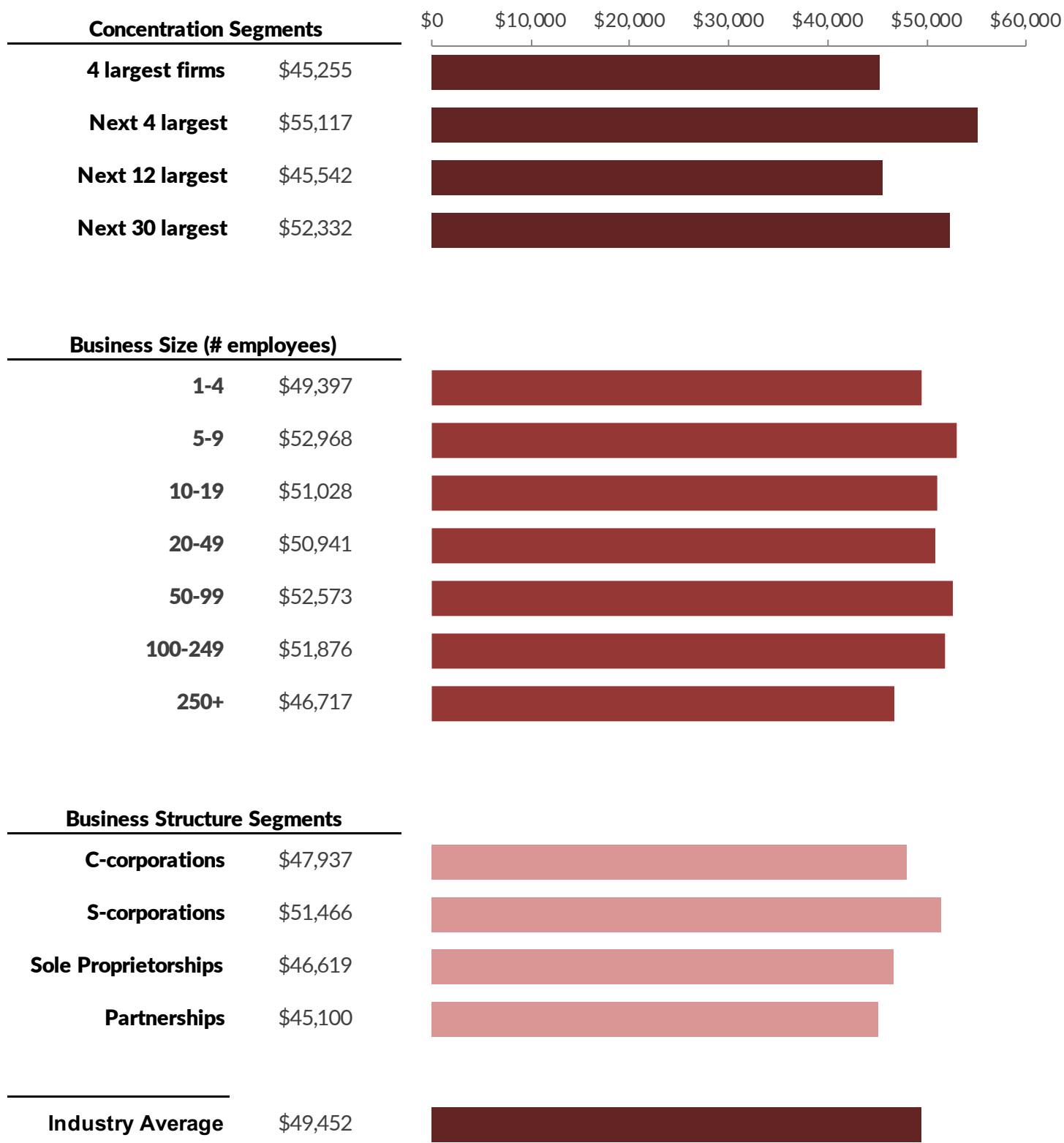
All figures in \$000s



## Payroll per Employee by Segments

Below are payroll per employee statistics for various industry segmentations including concentration, business size by employees, and business structure.

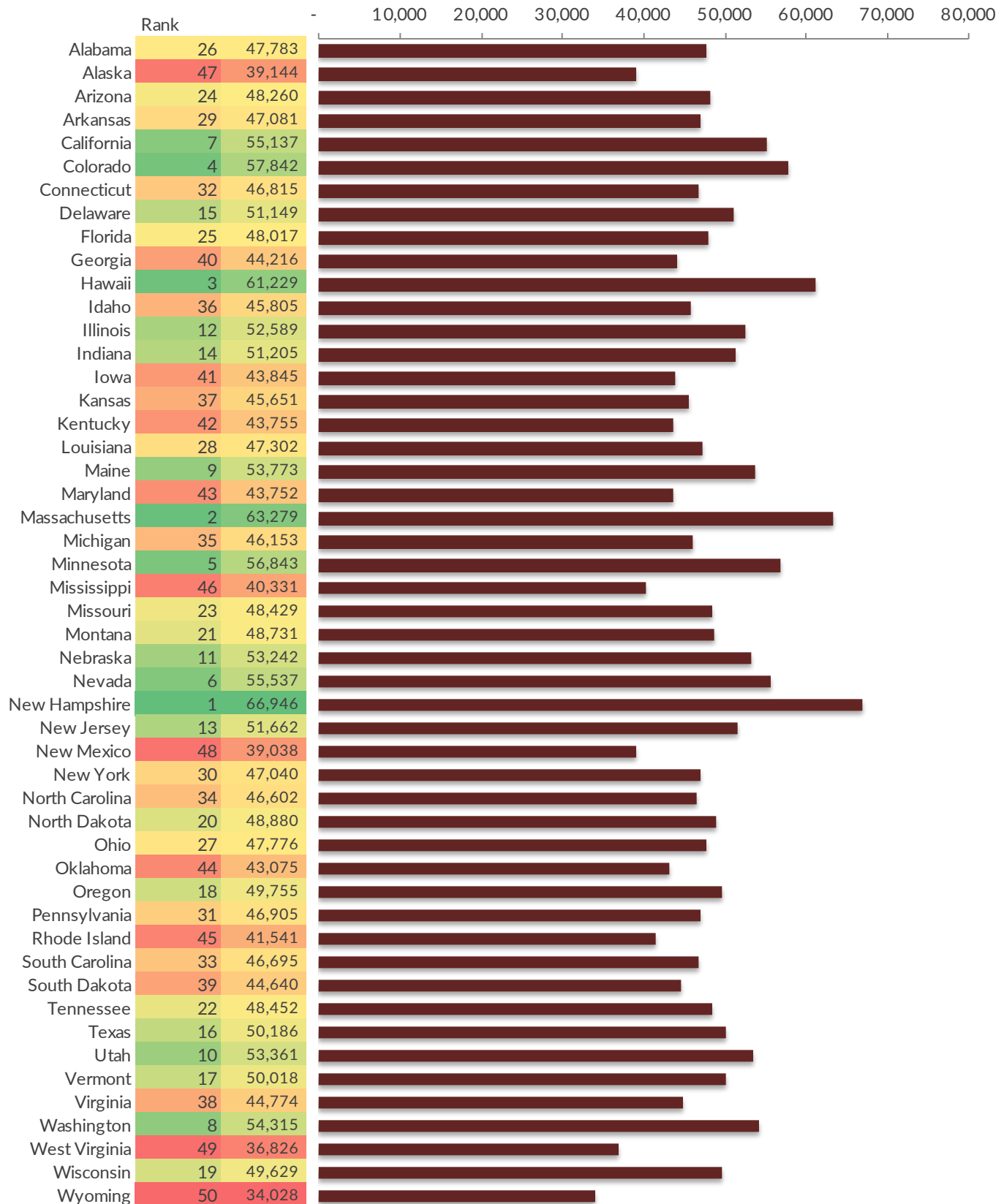
All figures in \$



## Payroll per Employee by State

The competition for talent is local, with the supply and demand dynamics of each state driving compensation.

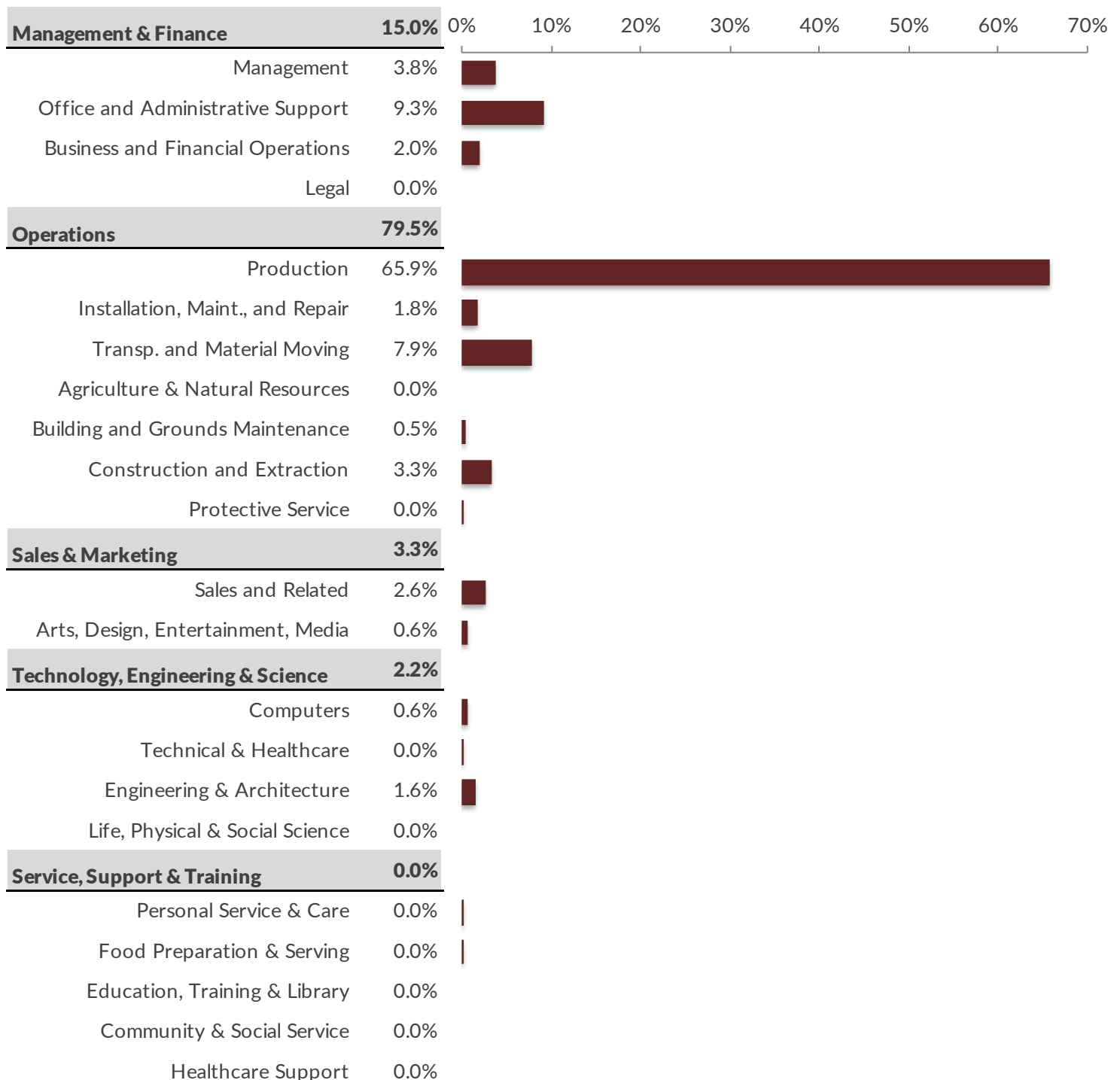
"No data" indicates no industry manufacturing facilities or an insufficient sample size.



## Workforce Composition

There isn't detailed job categorization data on the Kitchen Cabinet & Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Kitchen Cabinet & 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 Kitchen Cabinet & Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Kitchen Cabinet & 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 left blank.

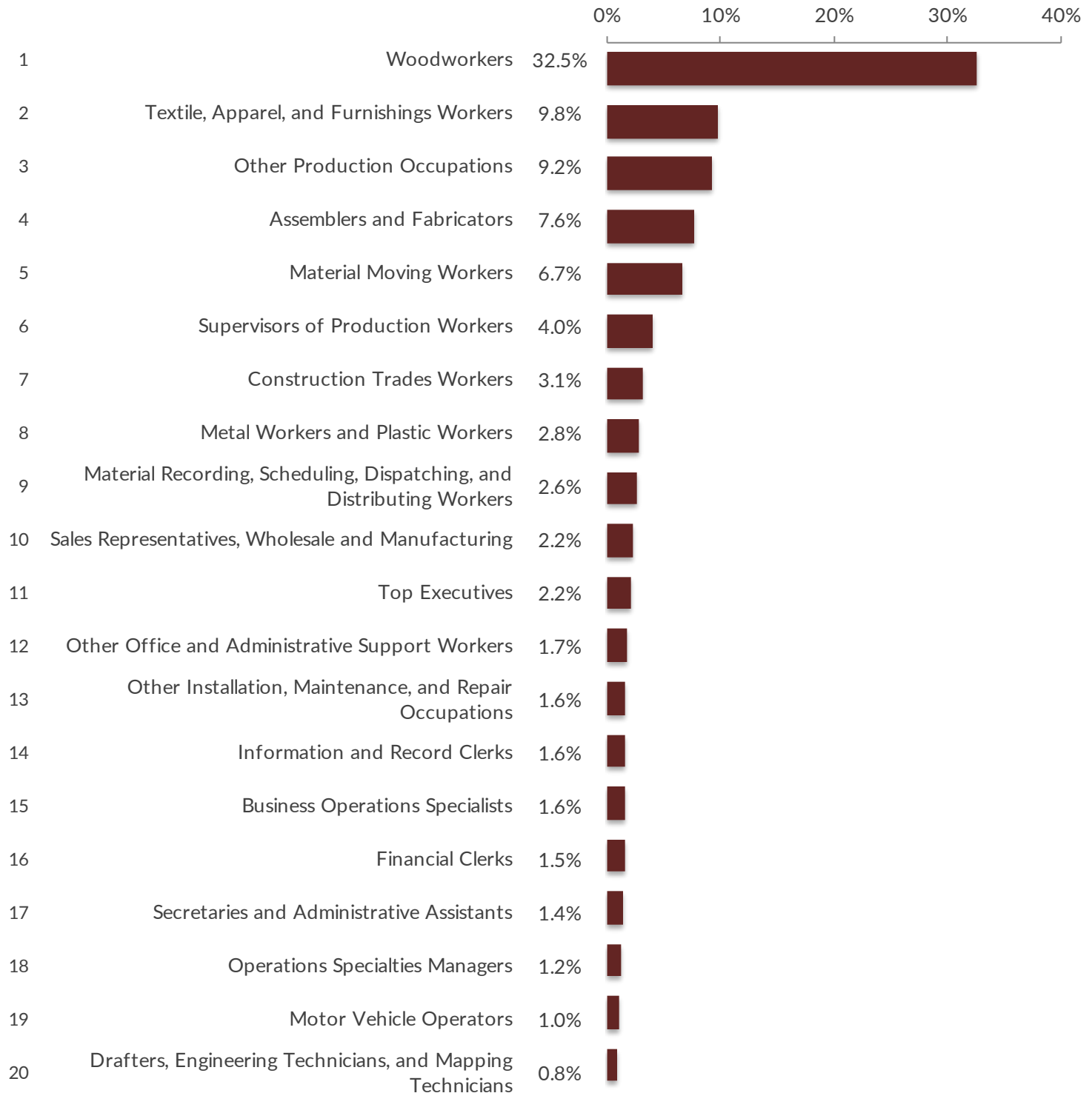
### Furniture and Kitchen Cabinet Manufacturin

| Industry Pay Ranges                          |            |            |         |         |         |  |
|----------------------------------------------|------------|------------|---------|---------|---------|--|
|                                              | Bottom 10% | Bottom 25% | Mean    | Top 75% | Top 90% |  |
| <b>Management &amp; Finance</b>              |            |            |         |         |         |  |
| Management                                   | \$22.56    | \$30.42    | \$50.73 | \$61.39 | \$90.77 |  |
| Office and Administrative Support            | \$10.28    | \$12.85    | \$17.31 | \$20.17 | \$26.01 |  |
| Business and Financial Operations            | \$16.61    | \$20.68    | \$28.05 | \$33.32 | \$42.20 |  |
| Legal                                        | #          | #          | #       | #       | #       |  |
| <b>Operations</b>                            |            |            |         |         |         |  |
| Production                                   | \$10.02    | \$12.04    | \$16.26 | \$19.06 | \$24.24 |  |
| Installation, Maint., and Repair             | \$12.99    | \$16.27    | \$20.81 | \$24.41 | \$30.04 |  |
| Transportation and Material Moving           | \$9.47     | \$11.02    | \$14.15 | \$16.21 | \$19.44 |  |
| Agriculture & Natural Resources              | #          | #          | #       | #       | #       |  |
| Building and Grounds Maintenance             | \$8.67     | \$9.65     | \$12.29 | \$14.26 | \$17.42 |  |
| Construction and Extraction                  | \$11.01    | \$13.66    | \$19.25 | \$23.15 | \$30.15 |  |
| Protective Service                           | \$8.28     | \$9.20     | \$12.27 | \$15.51 | \$18.21 |  |
| <b>Sales &amp; Marketing</b>                 |            |            |         |         |         |  |
| Sales and Related                            | \$11.91    | \$17.24    | \$29.39 | \$35.30 | \$49.73 |  |
| Arts, Design, Entertainment, Media           | \$12.54    | \$16.96    | \$24.24 | \$29.36 | \$37.36 |  |
| <b>Technology, Engineering &amp; Science</b> |            |            |         |         |         |  |
| Information Technology                       | \$16.46    | \$21.01    | \$29.87 | \$37.19 | \$47.59 |  |
| Technical & Healthcare                       | \$17.56    | \$21.72    | \$29.36 | \$37.02 | \$44.66 |  |
| Engineering & Architecture                   | \$16.61    | \$20.78    | \$28.07 | \$34.10 | \$41.97 |  |
| Life, Physical & Social Science              | #          | #          | #       | #       | #       |  |
| <b>Service, Support &amp; Training</b>       |            |            |         |         |         |  |
| Personal Service & Care                      | \$8.08     | \$8.78     | \$10.60 | \$12.05 | \$14.53 |  |
| Food Preparation & Serving                   | \$8.16     | \$8.81     | \$13.68 | \$14.77 | \$26.51 |  |
| Education, Training & Library                | #          | #          | #       | #       | #       |  |
| Community & Social Service                   | #          | #          | #       | #       | #       |  |
| Healthcare Support                           | #          | #          | #       | #       | #       |  |

## Top 20 Industry Jobs -Percent of Employment

There isn't detailed job categorization data on the Kitchen Cabinet & Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Kitchen Cabinet & 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



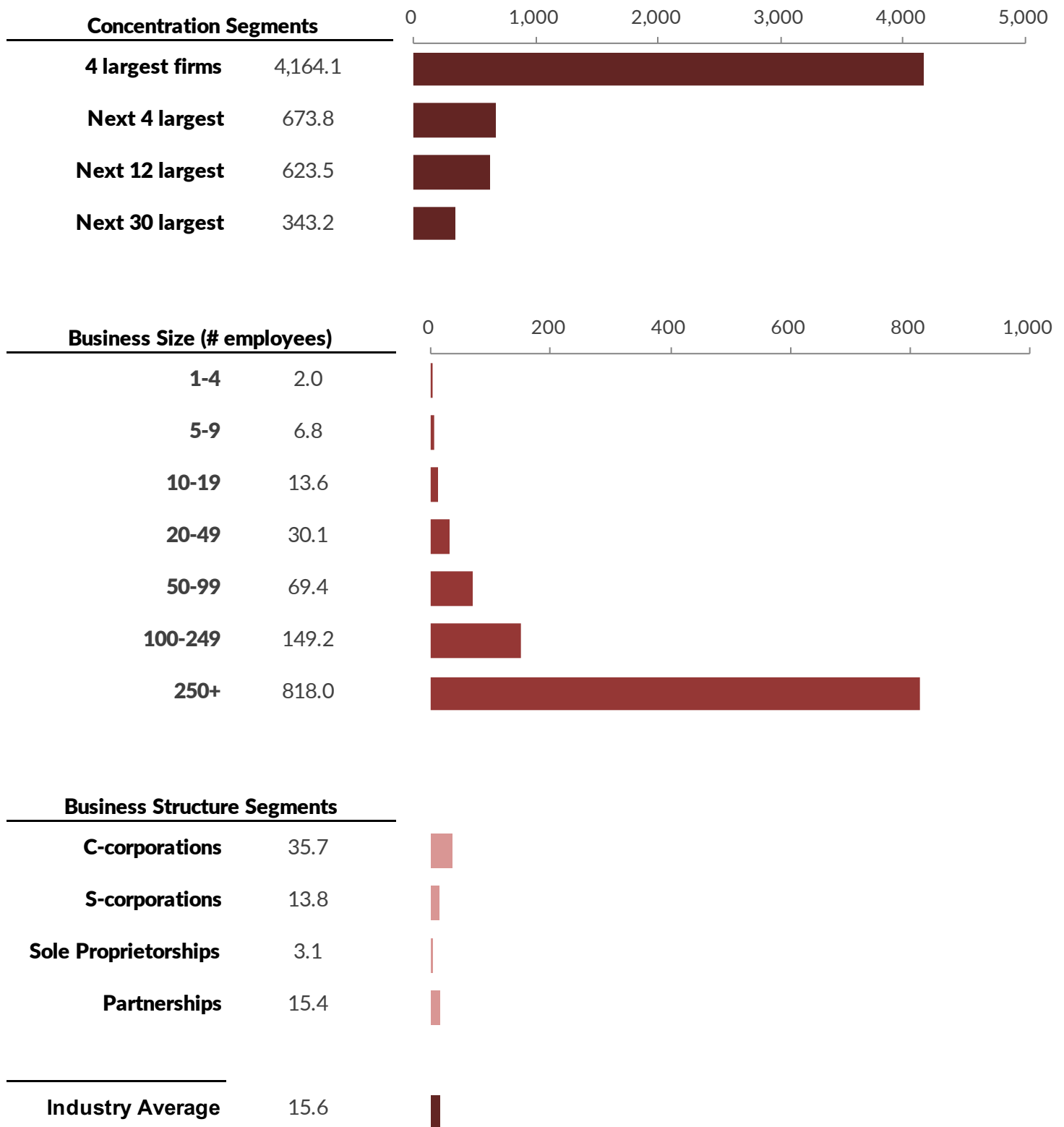
## Top 20 Jobs - Pay Bands

There isn't detailed job categorization data on the Kitchen Cabinet & Countertop Manufacturing industry. This data is on the Furniture and Kitchen Cabinet Manufacturing industry, which the Kitchen Cabinet & 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                                                           | \$13.41    | \$16.27    | \$21.12 | \$24.88 | \$30.86 |
| 2                             | Textile, Apparel, and Furnishings Workers                             | \$12.95    | \$15.68    | \$21.33 | \$25.37 | \$31.93 |
| 3                             | Other Production Occupations                                          | \$12.77    | \$14.54    | \$18.85 | \$22.09 | \$26.26 |
| 4                             | Assemblers and Fabricators                                            | \$13.09    | \$15.26    | \$19.71 | \$23.18 | \$28.51 |
| 5                             | Material Moving Workers                                               | \$12.36    | \$14.27    | \$17.82 | \$20.49 | \$24.53 |
| 6                             | Supervisors of Production Workers                                     | \$21.57    | \$26.19    | \$34.49 | \$40.98 | \$50.37 |
| 7                             | Construction Trades Workers                                           | \$14.87    | \$18.36    | \$25.59 | \$30.64 | \$39.73 |
| 8                             | Metal Workers and Plastic Workers                                     | \$13.61    | \$16.94    | \$22.37 | \$26.10 | \$32.33 |
| 9                             | Material Recording, Scheduling, Dispatching, and Distributing Workers | \$13.58    | \$16.22    | \$21.59 | \$25.08 | \$32.19 |
| 10                            | Sales Representatives, Wholesale and Manufacturing                    | \$17.19    | \$24.10    | \$40.10 | \$47.39 | \$66.71 |
| 11                            | Top Executives                                                        | \$27.73    | \$38.86    | \$71.59 | \$89.23 | #       |
| 12                            | Other Office and Administrative Support Workers                       | \$12.51    | \$15.13    | \$20.91 | \$24.86 | \$32.18 |
| 13                            | Other Installation, Maintenance, and Repair Occupations               | \$16.94    | \$21.21    | \$26.37 | \$31.24 | \$37.47 |
| 14                            | Information and Record Clerks                                         | \$14.62    | \$17.92    | \$22.83 | \$26.24 | \$32.57 |
| 15                            | Business Operations Specialists                                       | \$21.58    | \$26.72    | \$36.16 | \$42.53 | \$53.61 |
| 16                            | Financial Clerks                                                      | \$15.56    | \$18.89    | \$24.35 | \$28.79 | \$34.35 |
| 17                            | Secretaries and Administrative Assistants                             | \$13.32    | \$16.75    | \$22.71 | \$27.09 | \$33.84 |
| 18                            | Operations Specialties Managers                                       | \$31.66    | \$40.79    | \$57.52 | \$68.04 | \$90.95 |
| 19                            | Motor Vehicle Operators                                               | \$13.93    | \$16.99    | \$22.06 | \$25.48 | \$31.94 |
| 20                            | Drafters, Engineering Technicians, and Mapping Technicians            | \$20.02    | \$24.34    | \$30.91 | \$36.61 | \$43.76 |

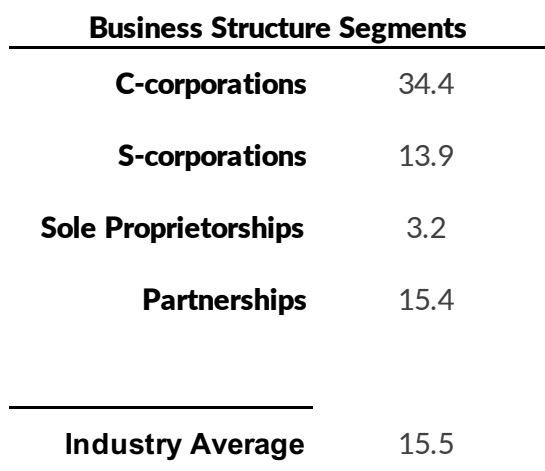
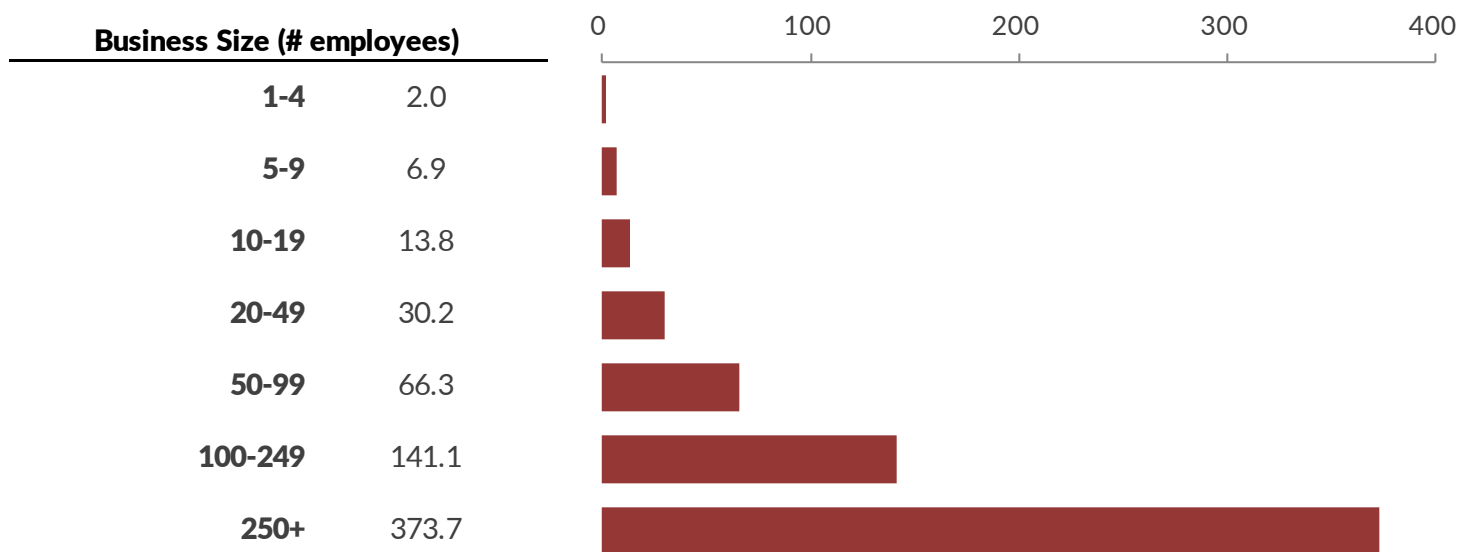
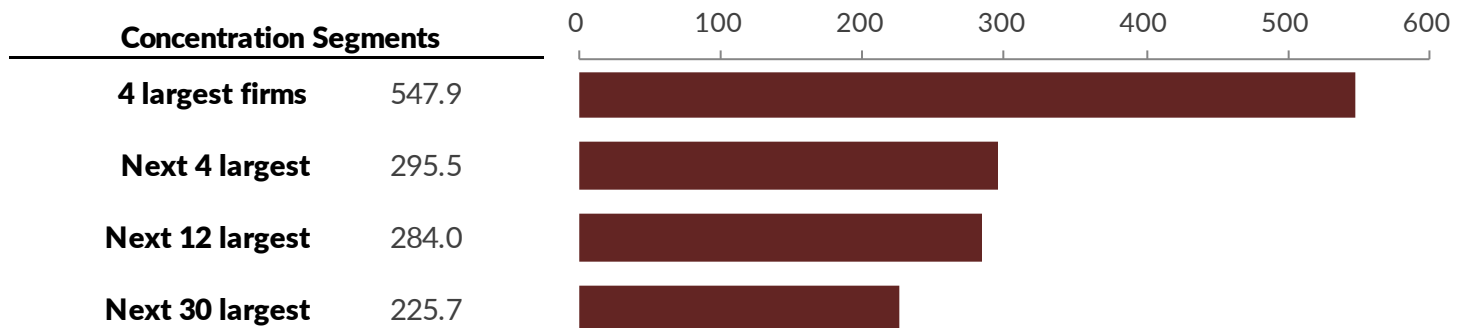
## Employees per Company by Segments

Below are employees per company statistics for various industry segmentations including concentration, business size by employees, and business structure.



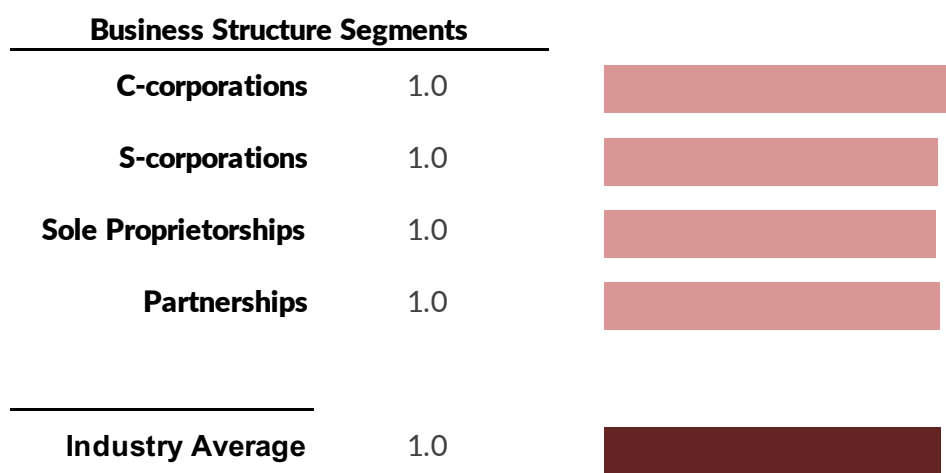
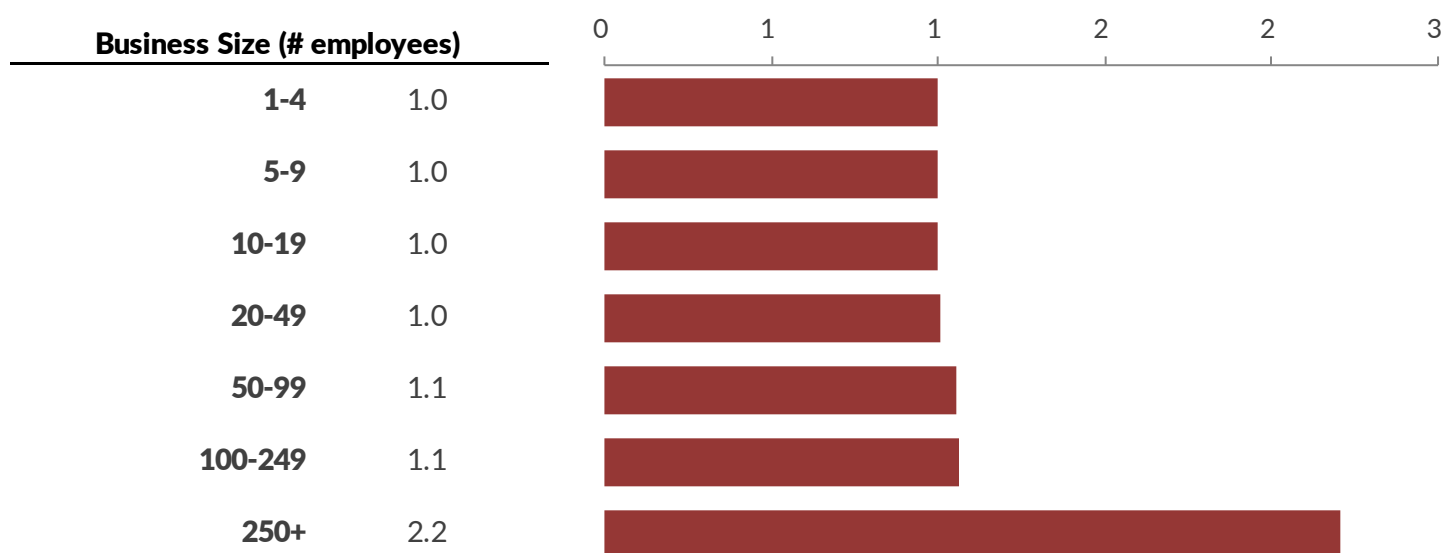
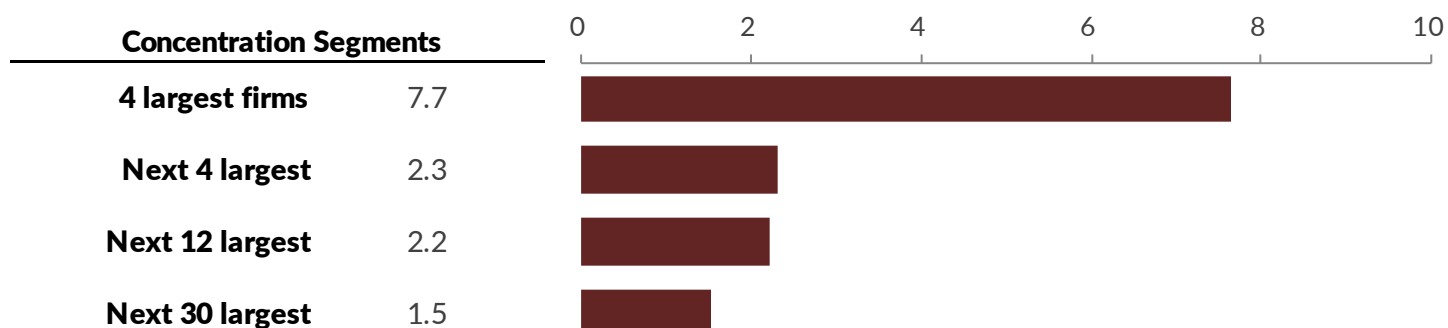
## Employees per Facility by Segments

Below are employees per location statistics for various industry segmentations including concentration, business size by employees, and business structure.



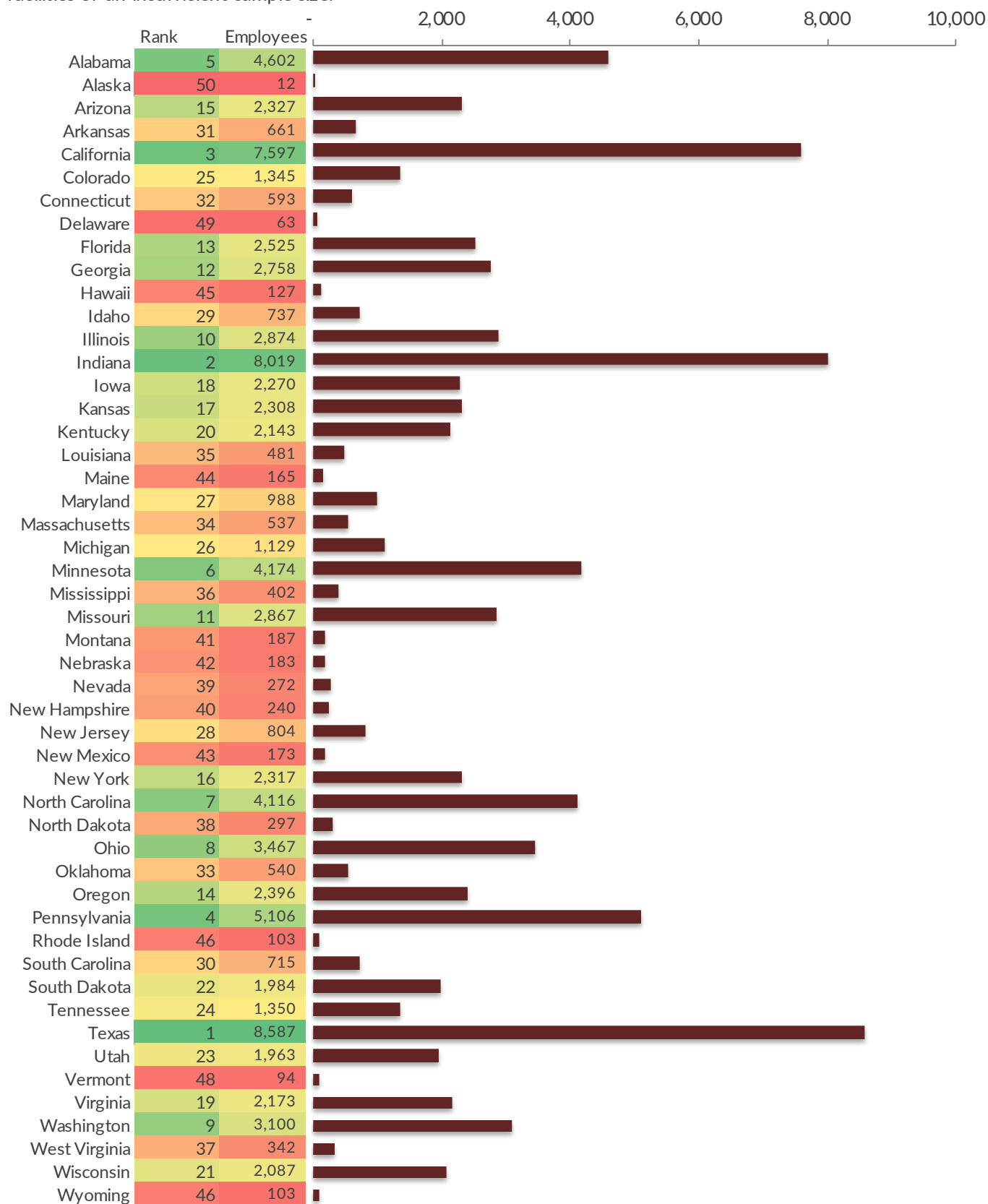
## Facilities per Company by Segments

Below are facilities per company statistics for various industry segmentations including concentration, business size by employees, and business structure.



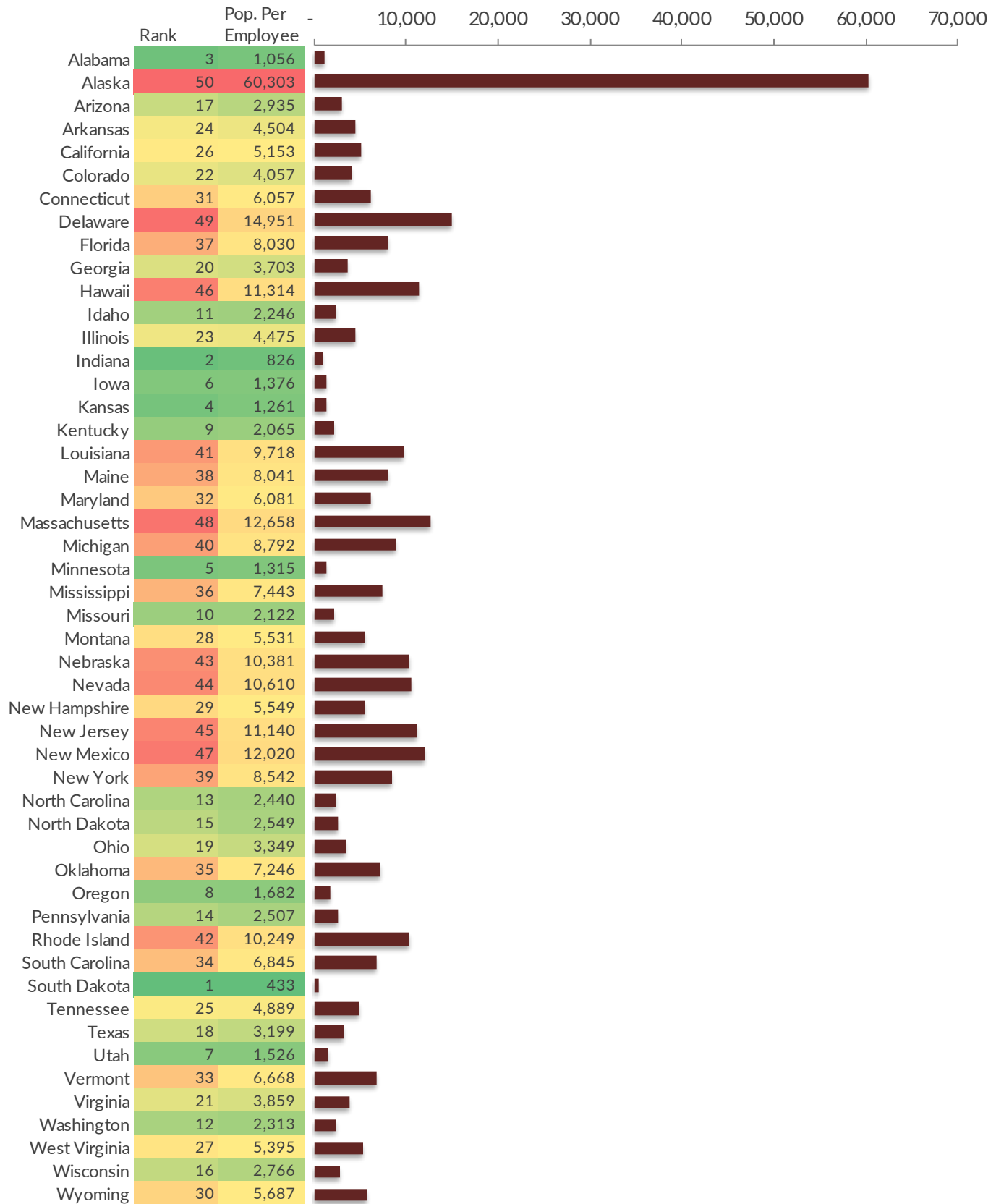
## Total Employees by State

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.



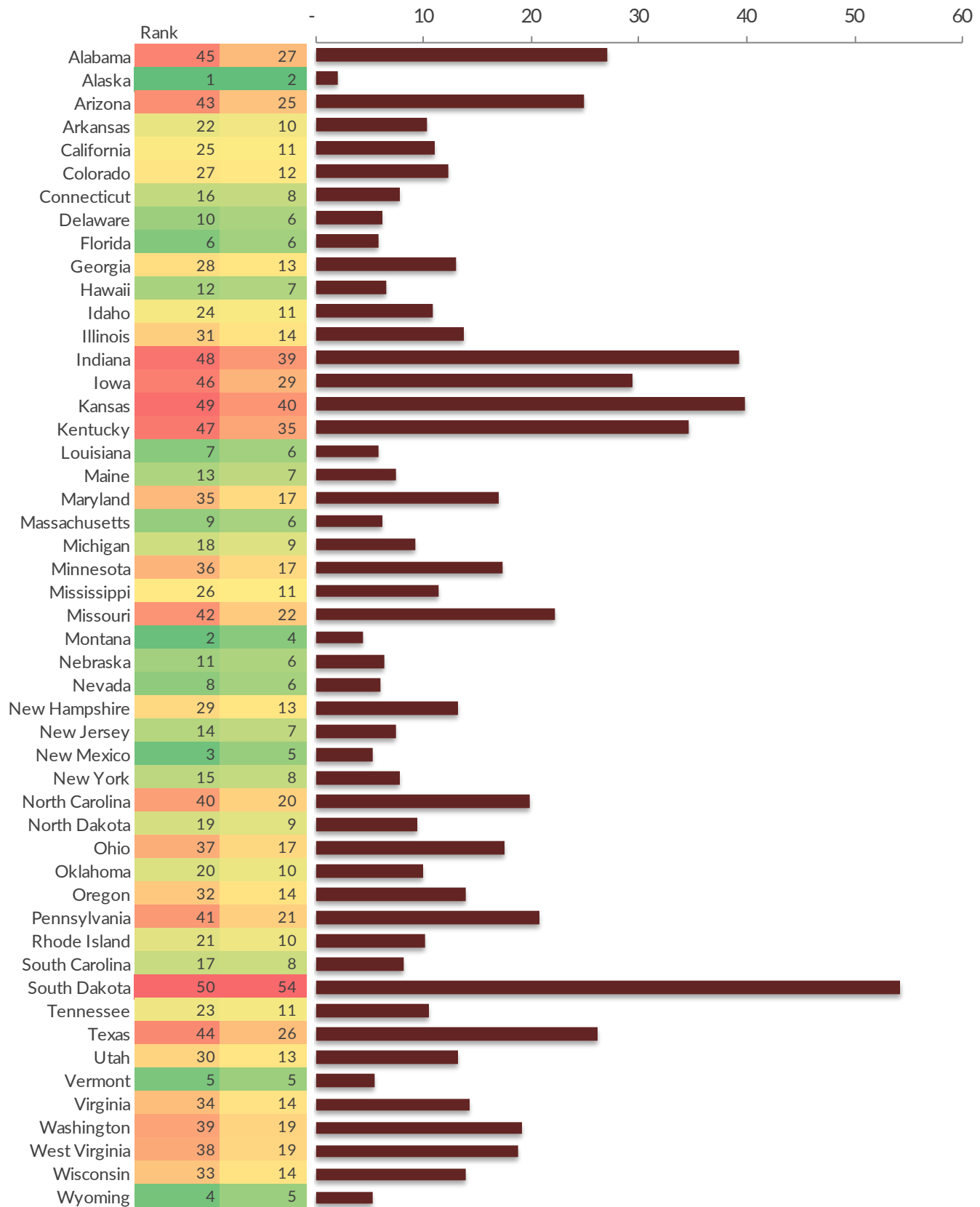
## State Population to Industry Employee

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.



## Total Employees per Facility

Below are the total employees per facility by state. "No data" indicates no industry manufacturing facilities or an insufficient sample size.



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