

# It's time to unite!

*Concerns about the future of the stone industry are felt in many parts of the globe, for a variety of reasons. This article examines aspects of a number of key studies and papers on the subject that have been published at home and abroad.*

*Before we examine some of the challenges which face our industry I would like readers to consider comments published in Stone World magazine which is published in the United States. Editor Michael Reis wrote 'Does the stone industry have a future?' in October 2012.*

*The depicted images illustrate aspects of production and sales processes which result in completion of various residential and commercial installations, ranging from installation of tiles, slabs, paving, walling and mechanically installed facades to major construction projects. Anthony Stock argues that industry should unite under one banner to compete against a rising tide of competitive products.*

**W**hen I look at the stone industry, I see a totally mixed bag — and I don't mean that as a good thing. As editor of Stone World and its electronic off-shoots (such as this e-Newsletter), I get a firsthand look at all aspects of our business — from one-man fabrication shops in small rented warehouses to large-scale fabrication plants to massive quarrying and slab-processing operations. I see these stoneworking facilities at work in all corners of the globe, and it seems that no matter what the size or scope of a business, when it comes to worrying about the overall direction of the industry, they usually fall into one of several categories. Frankly, these classifications can also apply to technology suppliers.

**A.** Operations that are genuinely concerned with

the greater good of the stone industry. They support initiatives that benefit the trade as a whole — whether it is generic promotion of the stone industry, associations or other mediums for promoting the craft. They share their knowledge with their fellow industry members. They are continually looking to improve their own operations while also enhancing overall consumer awareness and education. In general, these firms are the key to positioning stone as a premium building material.

**B.** People/firms that have the financial means and experience to offer a great deal to our industry, but that continually choose to look out solely for their own interests. Far too often, their attitude is "What's in it for me?" or "What's my return?" Even though they may ultimately benefit from the time and effort given by other industry members — those who contributed to fighting the "Great Radon Scare," for example — they have no personal interest in anything that doesn't give a direct, tangible benefit to them in return. (And believe me, if not for the efforts of the Marble Institute of America and its "Truth About Granite" campaign, that radon scare would have been a LOT worse. That program was funded by conscientious industry members, who dug into their pockets during a brutal recession because they understood just how necessary it is to foster our industry as a whole.)

**C.** Low-ballers who couldn't care less where the industry is headed. They sell solely on the basis of price and generally do poor work. These companies not only drive down the value of



Acrogem quarry, Gosford Quarries





Created in Stone showroom , Melbourne



Kanmantoo stone, private residence



Piles Creek columns Hilton Sydney, from Gosford Quarries

granite countertops; they commoditize the industry as a whole. While many of these companies do not last very long, it seems that there are always a few in every market — no matter where you go or what state the economy is in. The only way to offset these guys is to keep promoting quality and service — and, once again, to support initiatives and organizations that foster our industry.

**D.** Companies that may want to help out the industry, but they just don't know how to start. Or maybe they don't feel qualified enough — or too inexperienced — to get involved. I actually don't think there are all that many companies that fall into this category, but if you feel you are one of them, I would suggest that the trade associations are a great place to start.

So what does all of this mean in the end? It means that if the companies in Category B (you know who you are) don't start thinking like the ones in Category A, our industry may ultimately get steamrolled. The stone industry is not just battling the economy; it is battling alternative products from giants like DuPont and other conglomerates — products with deep enough marketing budgets that they can take a massive chunk out of our fragmented industry. As I said, the low-bidders will always be there, but there are enough quality companies out there that we should be able to maintain

stone's status as a high-end, high-quality product.

Earlier this year, the Marble Institute sponsored a study of homeowners, which was conducted by Harris Interactive. It revealed that 75 per cent of homeowners who intend to remodel their kitchens in the next two years indicated they want granite countertops. So to answer my question at the top of this column — “Does this industry have a future?” It would seem that the answer is a resounding “yes,” but it is not going to happen automatically.

Look, I know that times are still extremely tough out there, and there are some companies that are still in “survival mode.” Naturally, their priority should be ensuring that their business remains viable.

But having said that, there are so many companies in our industry that have weathered the storm, and they are currently showing growth. When I talk to stone producers (and believe me, I talk to them all the time), I hear this more often than not.

As we move forward, it is up to the current (and future) generation of our industry — stoneworking facilities, technology suppliers, stone distributors, all of us — to consider where we are going as an industry as a whole and avoid the “this-for-that” mentality. Trust me, if you're in it for the long haul, you will benefit every time our industry advances.



Inside PazStone Melbourne facility

The size and scope of the stone industry in the United States is much greater than our industry. They have more producers, more power, more money, supported by the world's premier stone industry body, the Marble Institute of America (MIA).

Despite that, Michael's classifications apply equally to our industry.

In the US national stone producers, fabricators and suppliers have the capacity to resist the growing attraction of engineered stone. By and large most of the Australian companies which have natural stone products that are suitable for bench or vanity tops show little interest in trying to market their product as slab material. When I was purchasing a new kitchen I was offered a variety of imported granites and numerous engineered stone products.

When I showed the kitchen designer the Australian granite we ultimately selected, she confessed that she had no knowledge about Australian natural

stone. The kitchen company's showroom was located 10 minutes' drive away from the local supplier's premises.

Naturally, the local company's interests primarily lie in other areas, and other materials which are more profitable.

The Australian Stone Advisory Association (ASAA) is striving to spread the word about the benefits of using natural stone, and while membership numbers are stable, ASAA needs to grow. Right now we do not have the financial clout of the MIA, yet we have achieved a number of goals:

- ASAA has produced and sold more than 200 copies of the ASAA Natural Stone Design Manual, primarily to specifiers. This 388-page publication represents an Australianised version of the MIA's manual. In the absence of an Australian Stone Standard it provides the best available information on the nature, selection, installation and maintenance of natural stone. Importantly, the manual was largely written by the same people who would have contributed to an actual standard.
- ASAA continues to contribute to Australian standard's committees like BD-094.
- ASAA has joined forces with the Australian Tile Council to publish a guide to slip resistance in residential environments.
- ASAA stages 3 or 4 seminars per annum.
- ASAA will participate in designEX 2014 in Sydney, where it will assist in staging additional seminars.
- ASAA has successfully introduced Architectural Awards for use of local and imported stone.
- ASAA members provide assistance to specifiers seeking information on selection of the right stone.
- ASAA also provides access to experts who can visit site, take photographs, and write reports on alleged defects.
- ASAA answers questions on matters related to stone, virtually every day of the week. Often these questions come from non-members, or their clients.
- ASAA is also in the process of revising its website and producing Youtube videos displaying member's products.
- ASAA actually beat the MIA to the punch by partnering with Good Environmental Choice Australia (GECA) to effectively produce an Ecolabel Standard #40 for Hard Surface products in 2008. The standard was recently revised, which led to its acceptance by the Green Building Council of Australia and the award of maximum points for approved products specified for use in 'Green Star Rated' projects.

For a small but growing association it is not a bad list of achievements, yet many potential members probably fall in Michael Reis's category 'B' classification.

While the growing popularity of the ASAA website and the free listing of member's names in *Discovering Stone* provide business for some members, the prime benefit for members will be derived from growing the association and enhancing its ability to represent all factions of industry. If the industry expands and we acquire a greater capacity to promote the benefits of using natural stone, everybody will benefit. Obviously, some people will hitch a ride on the coattails of others; that has always been the rule. If everyone adopts a negative approach the results for industry could be a continued loss of ground as manufacturers and distributors of competitive products gain a greater foothold.

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	Australia	Europe (UK)
<b>Living Space</b>	Australia is still expanding within liveable areas	England has no more spaces to build
<b>Architectural styles</b>	Builders have more scope to develop local styles	Builders must follow established regional styles
<b>Population numbers</b>	Relatively lower population numbers means that the market for natural stone is not as great as in other countries, although Asian markets may become more accessible	The UK has access to European markets
<b>Climate</b>	Warm, dry climate favours outdoor working. Houses are built to accommodate air circulation: large windows, overhanging eaves, under floor venting, high ceilings	Cool, wet climate limits outdoor work. Traditional houses built with thick walls, low ceilings and small windows to suit damp climate
<b>Distance</b>	Freight costs are very high	Freight costs are relatively lower
<b>Quarry infrastructure</b>	Road and rail are still being developed	Excellent road and rail services
<b>Skills shortage</b>	Shortage of skilled workers	Shortage of skilled workers
<b>Stonemasonry skills</b>	Hand skills are valued less than machine operation skills	Hand skills are highly valued
<b>Stone varieties</b>	Many stone varieties remain undeveloped	While there are no new stone varieties being discovered, sometimes quarries are reworked for heritage projects

### Areas of Concern

In 2008 the International Specialised Skills Institute located in Melbourne published a paper entitled 'Traditional and Contemporary Practices in the UK Stone Industry' which was prepared by Simon Brown. Simon spent 20 years working as a stonemason before joining TAFE Queensland, as a full-time stonemasonry teacher.

The ISS receives funding from Federal and State governments, plus a variety of organisations and philanthropists.

As a fellow of the institute Simon travelled to the UK where he gained a valuable insight into how the stone industry functioned in that particular country. ISS fellows gather information, and on their return to Australia, publish reports based on their findings. An ISS fellow usually presents three seminars to disseminate the news.

Simon's study was federally-funded by the Department of Education, Employment and Workplace Relations.

The report's Executive Summary states, 'In Australia today there is a clear need to: 1) provide career advice for those seeking to enter working with stone in the built heritage; and 2) provide high level skills and knowledge for those working in the built environment in heritage contexts and transposing those capabilities into new works. Fundamental to the discussion is developing an appreciation and respect for materials and processes that allowed former master artisans to create such enduring fabrications.'

Traditional stonemasonry skills and knowledge must be retained into modern stonemasonry practice so that a depth and breadth of expertise is maintained. Stone buildings from past times provide examples of sought-after skills that are rare, even non-existent today. Early stone working technologies support sophisticated contemporary capabilities because they are grounded in respect for the material. The Australian stone industry needs clever, committed skilled artisans not only to maintain our built heritage, but also to develop smart, new ways of applying conventional skills in the modern workplace. Fellowships such as those provided by the ISS Institute will provide

opportunities for ensuring a sound skill base for the stone industry of tomorrow.

The report's broad aims included:

- Promoting natural stone as a material for use in the contemporary built environment, in addition to manufactured options such as concrete, glass and steel.
- Further developing an understanding of the ways in which natural stone can be used as a sustainable resource, e.g. (a) promoting energy-efficient extraction and production processes (b) advocating environmental attributes such as insulating properties.
- Developing an understanding of stone conservation
- Developing resources available to skilled tradespeople, enhancing the capabilities of those working with stone, that is, those who are skilled in design, and who have high level knowledge of the physical characteristics of natural stone and its exploitation.
- Guiding skilled teachers to instruct the next generation of stonemasons and upskill those working in industry.

However, it is not only ancient buildings and memorials that provide examples of skilled work practices – current stone projects exploit sophisticated equipment to quarry, handle and process stone, which has remained essentially the same material. Artisans sought by the contemporary stone industry have a wide repertoire of skills, including traditional stonemasonry techniques, machine operation, and problem solving and people management abilities.

The report also finds that,

"ironically, the press of imported finished natural stone products has stimulated the local market. Stonemasons, who once quarried and crafted only local stone, now import a range of natural stone to supplement their range. There is now more need than ever for skilled workers to re-work and install imported natural and manufactured stone. In the current climate, local stone products are not viable, although the increased exposure of natural stone as an alternative to fired clay and cast concrete goods may yet resurrect in an interest of Australian stone.

To sustain the stonemasonry trade, masons need to be able

to move between contemporary and heritage work to maintain a viable business. Accordingly, stonemasons work in contemporary settings with a few enhancing their capabilities to add heritage conservation to their range of projects; therein they require a skill and knowledge base to meet both work environments.

The disparity in dollar values between stone imports and exports are fully portrayed in Peter Halliday's articles on the subject in this edition. Nevertheless, we have around 70 active stone quarries versus one major ceramic tile manufacturer. Importantly, companies like Australasian Granite, Melocco Stone, Capricorn Sandstone, Cairns Marble and Gosford Quarries amongst others are actually exporting Australian stone to countries like China and Italy.

These companies are examples of what can be achieved, but the fact remains that a lot of the abundant local resources are impractical in terms of location and associated operating costs, and while extraction, processing and transport costs remain at current levels, importing stone will remain a popular alternative.

However, the ISS report correctly concludes:

as established previously, that the Australian stone industry faces serious competition from Asian neighbours. While it may be that we need to ascertain the best way of working within this competitive market; whatever the outcome, it is essential that we develop and retain the necessary skills to ensure the longevity of our own industry. With regard to skills gaps it is apparent that the most significant gaps involve knowledge of traditional processes. These skills are not only apparent within traditional fields of practice, but transpose into contemporary applications.

In discussing traditional skills, we are essentially referring to those carried out expertly by hand, using hand power tools to craft structural and decorative elements and products. Traditional knowledge consists of familiarity with natural stone and mortar materials associated with quarrying, processing and installing dimensional stone.

Within his professional practice as Stonemasonry Assessor and Workplace Trainer at Brisbane Institute of TAFE, Brown identified a need for proficiency in the following traditional fields:

- Masonry construction
- Masonry restoration
- Letter cutting, carving and detailing
- Sculptural design and practice

These skills are taught around Australia at TAFE colleges such as Brisbane Institute of TAFE. However, the skill level currently achieved is restricted to AQF Level 3, the basic requirement for trade activities. There is a requirement for higher-level Stonemasonry trade skills to be taught.

The table (opposite) illustrates some of common ground that our industry and the industry in the UK share, some of the key areas of concern, and a couple of useful advantages that bode well for the future.

Possibly some of our greatest concerns relate to our general inability to adequately establish and promote benefits of using natural stone in new building construction. The days when many new places of learning, places of worship and important public

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buildings and bridges were usually built of stone are long gone. Today, the facades of important office towers and high rise apartments will probably be clad with a lightweight alternative, that is easier to handle and install.

Development of suitable thin stone veneers and panels is critical. Having said that there is a general lack of information about the cost of producing stone facings versus brick and other materials. How are specifiers supposed to understand the advantages of using stone versus brick if there is an absence of information on the subject?

In 1980 the Stone Federation in the UK, with support from the Department of the Environment, commissioned a report entitled 'A Future for Stone' which examined the potential use of stone in new buildings. The report was published by Hutton and Rostron.

Following widespread consultation in response to industry questionnaires the report included several surprising statistics. It should be noted that some of the data quoted is not complete because some of the data supplied is insufficient to determine the total energy consumed. Nevertheless, it makes interesting reading:

## Comparison of Energy Required to Produce Loadbearing Walls

### B6-2 Sandstone blocks

Blocks 10 MJ (approximation of total works energy), 9.5 per metre	95.0 MJ
Mortar, say	15.0 MJ
Total energy per square metre of walling	110.0 MJ

### B6-3 Brickwork

Average of all types 5.5 MJ, 60 per square metre	330.0 MJ
Mortar, say	60.0 MJ
Total energy per square metre of brickwork	390.0 MJ

### B6-4 Concrete Blocks

Concrete blocks 34.35 MJ, 9.5 per square metre	326.3 MJ
Mortar, say	15.0 MJ
Total energy per square metre of blockwork	341.3 MJ

The term MJ refers to the amount of energy expended to complete a specific task. For the purpose of the study, the calculation of energy consumed by circular saws was obtained from observations at; Bottomcombe Works, Easton, and Portland. These were as follows:

- 1.5 minutes per square foot, 40 square foot an hour at 45 horsepower cutting Portland Stone, i.e. 3.7 square metre consumes 120.83 MJ

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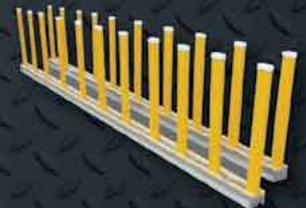
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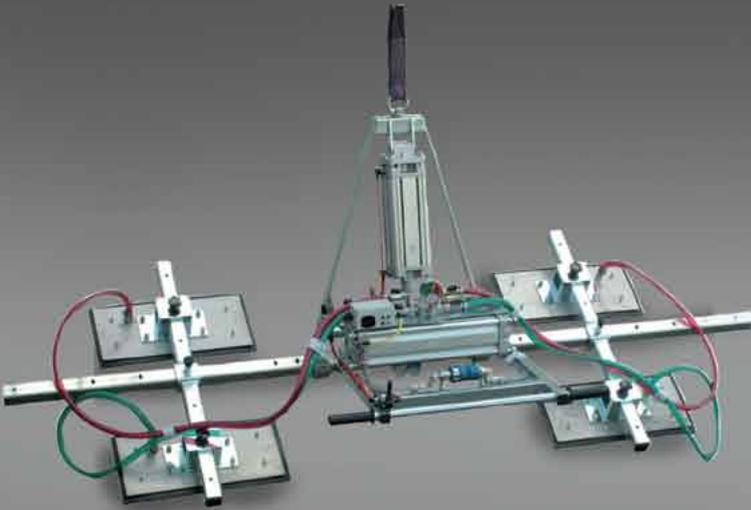


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b. Total works energy consumed 10kW per cubic foot, i.e. 1271.2 MJ per cubic metre

The study in question was completed more than 30 years ago. Saw speeds and production processes employed to produce similar quantities of the same materials are undoubtedly faster than they were. This begs the question is it still cheaper to produce sandstone, our major natural stone resource, than brickwork, or concrete blocks. If it is why are we not publicising the fact? What other useful comparisons can we make that illustrate the practical benefits of using natural stone on floors, walls, benchtops and facades versus competitive materials?

If this is a task that ASAA should undertake, who will fund it?

The future of the stone industry in Australia is a collective one, simply because a house divided cannot stand. If a majority continue to work in isolation, answers to questions of this kind will never be supplied. If all we can do is mutter niceties about the distinction, beauty and durability of stone without providing any real substance we will continue to lose market share to competitive hard surface finishes. <sup>CS</sup>