

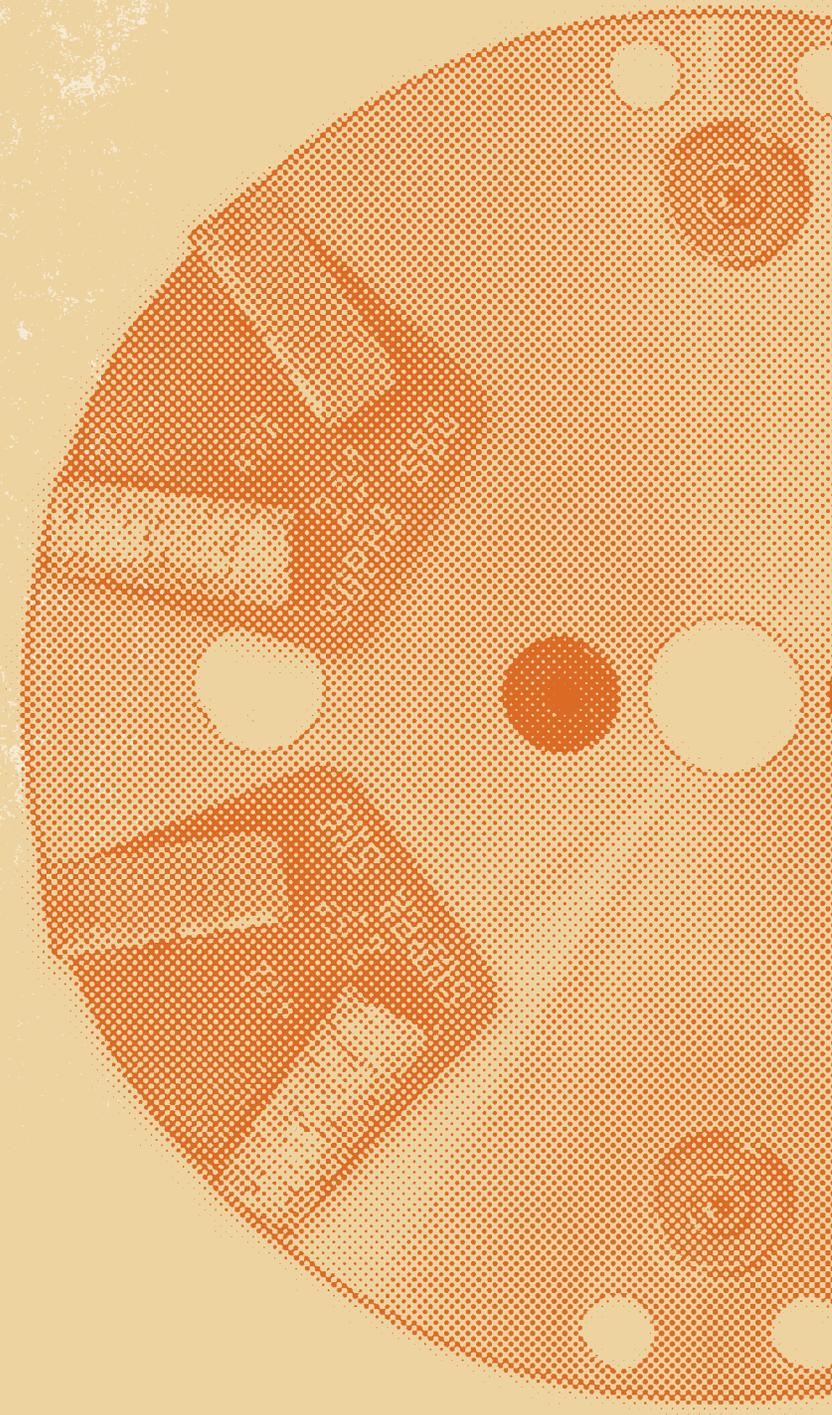
CONCRETE POLISHING TODAY

FIVE TRENDS THAT ARE
SHAPING THE INDUSTRY

BY CHRIS SULLIVAN

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ABOUT THE AUTHOR

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INTRODUCTION:

IT KEEPS GROWING AND GROWING

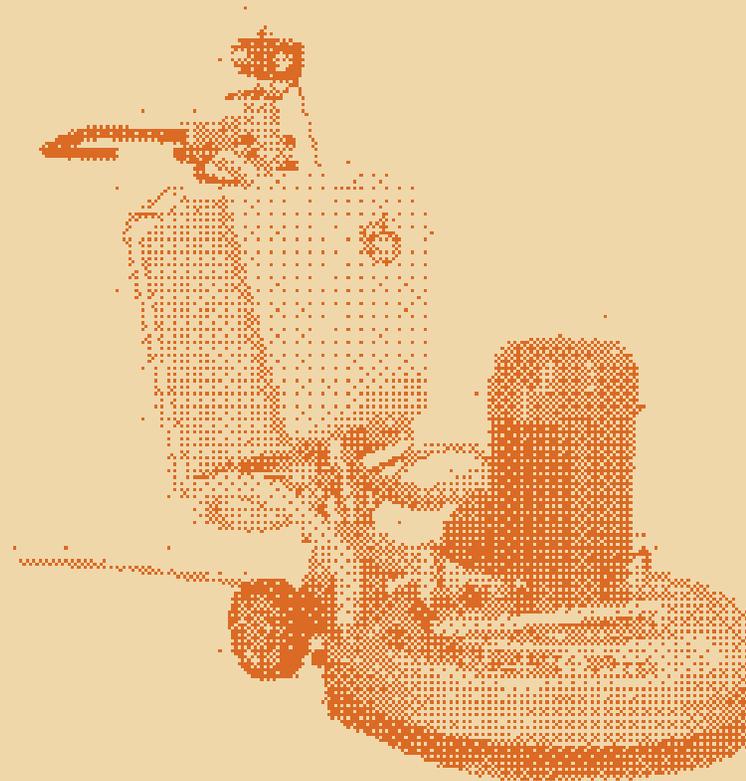
Polished concrete is without a doubt the hottest market segment in decorative concrete today. It has held that title for the last five years, and shows no signs of giving up the number one position any time soon. The commercial and industrial flooring communities have embraced polished concrete as the new standard when a combination of aesthetics, durability, reduced construction costs, and minimal environmental impact is desired. Many large retailers such as Home Depot, Wal-Mart, and Lowes have switched to polished concrete as the standard flooring for both new and existing stores.

I interviewed experts from all fields of polished concrete around the country, and the common recurring theme was "growth." The industry barely existed 13 years ago. Today, it now dominates the decorative concrete marketplace, as evidenced by the annual revenue it generates. What's more, the growth in the popularity of polished concrete is unlikely to wane, especially as the word spreads about the many benefits of polished floors.

Unfortunately, along with this huge market growth comes the lure of easy money. Many installers have ventured into the industry without a true understanding of the market and the large capital investment required. For many, reality soon replaces perception as it becomes evident that polishing concrete requires a high level of concrete expertise, on-the-job experience, and some deep pockets to survive the initial startup.

The biggest mistake installers new to polishing make is to assume that all concrete is a good candidate for polishing. With polishing, the concrete you start with has the biggest impact on what you end up with, and in many cases the installer has no control in how the concrete is placed and finished. Learning to read concrete is an art that comes with years of being on the floor behind the machine, a fact often missed by the novice installer.

In recent years, the level of education provided by the supply side of the industry regarding the reality of what it takes to be successful has increased dramatically. This trend needs to continue, with emphasis not only directed toward the installer side of the business, but to end users as well. In the early 2000s, polished concrete was marketed and sold to designers and owners as a maintenance-free flooring option. But it didn't take long before many polished floors began showing significant wear and required some level of maintenance to perform as promised. An industry-wide reality check in the mid-2000s brought the marketing side of the industry in line with the true production capabilities of polished concrete floors. It is a testament to the staying power and market acceptance of polished concrete that the industry absorbed those initial failures, changed the marketing focus, developed new products and systems to meet the demands, and never missed a beat. Polished concrete not only survived those early failures but learned from them, adapted to the demands of the market and kept right on growing. — **CHRIS SULLIVAN**



THE HISTORY OF POLISHED CONCRETE

The process of honing or polishing hard, dense surfaces has been around since antiquity. Early Greek, Roman, and Egyptian civilizations learned that by systematically grinding and sanding certain types of stone with other stones and materials of similar or harder properties, they could produce a smooth, shiny surface with a deep luster. One only needs to visit archeological sites and old churches in the Mediterranean or Europe to see evidence of polished stone and tile that have survived thousands of years and still look amazing today.

As technology improved and the industrial age ushered in machinery that could do the work of many men in a fraction of the time, the process of polishing stone changed significantly. The introduction of diamond dust and diamond-impregnated discs shortened the time required to polish stone and increased the quality of the finish. Polished stone and tile could be mass produced, lowering the cost and making it more affordable for a growing middle-class population. Prior to polished concrete, terrazzo was also a popular flooring choice, but the cost was often prohibitive. Once systems were refined to permit the polishing of concrete to achieve the same attributes and aesthetic value as terrazzo and polished stone, the industry never looked back.

The first complete system for polishing concrete was introduced by Advanced Floor Products, Salt Lake City Utah. Called the Retro Plate system, it combined the benefits of a penetrating sealer that chemically hardened concrete with the process of mechanically grinding and polishing the concrete using diamond-impregnated pads. "We consider Retro Plate the grandfather of polishing systems," says Vernon Talbot, managing director of Retro Plate Inc. "It was the first full system that included grinding, polishing, and chemical densification."

In 2000, Home Depot signed up as the first large-scale company to convert to polished concrete floors. The initial locations were all existing stores, but as the benefits of polished concrete became clear, Home Depot mandated the floors in all store locations, both new and existing. It was not long before Lowes, Wal-Mart, Bed Bath and Beyond, and other large retailers signed on to use polished concrete as their primary flooring system. Today, many large-scale big-box stores as well as smaller retail outlets polish their floors.

FACTORS DRIVING THE GROWTH OF POLISHED CONCRETE

Since the polished concrete market took off in the early 2000s, the growth has never stopped. “Polished concrete exploded nationally - faster than anyone could have imagined,” says Talbot. “The downturn in the economy did slow things a bit, but the overall growth was still huge.”

Considering the unprecedented growth polished concrete has experienced over the last decade, it is interesting to look at where the market stands today. “Coming out of adolescence into early adulthood,” is how Brad Walker, owner of Lone Star Decorative Concrete, Watauga, Texas, puts it. He says that three out of every four commercial jobs he comes across end up going with polished concrete. “Everything is going polished - dealerships, schools, light commercial, retail, government, and big box,” he says.

One major trend driving the growth of the polished concrete market today is the cost-reduction benefit. “Although aesthetics is certainly one of the main factors why clients choose polished concrete, other considerations such as huge reductions in annual maintenance costs and the light reflectivity draw them to these floors,” says Bob Harris, owner of The Decorative Concrete Institute, Temple, Ga. Because of the blend of mechanical and chemical hardening that takes place when concrete is polished, the result is a floor that is smooth and easy to clean. This allows companies to reduce the amount of time and money spent on floor cleaning and maintenance. When you consider the number of square feet of flooring a company like Home Depot has under one roof, the savings can be considerable.



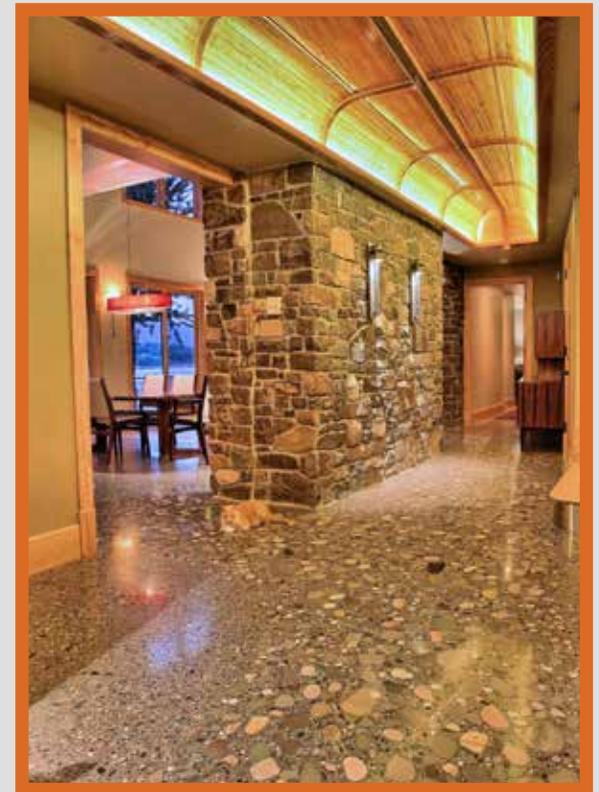
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“Everything is going polished — dealerships, schools, light commercial, retail, government, and big box.”

—BRAD WALKER

The process of polishing concrete also increases the reflectivity of the floor through increased luster and shine. This increase in reflectivity can allow a company to reduce the amount of artificial light required to illuminate a building, which also leads to large cost savings.

While the primary focus of polished concrete has historically been commercial flooring, residential applications are gaining in popularity as homeowners realize they can garner the same benefits in reduced electricity and maintenance costs. "We have seen a large increase in the number of residential basements being polished," says Abner Peachey, sales manager for Rosebud Concrete, Myerstown, Penn. Peachey says that 50% to 60% of their polished work is residential basements. The residential side of polishing has been a target market for smaller, more specialized high-end installers who choose not to compete with the large companies on big commercial projects. "It is next to impossible to compete in the industrial arena with companies offering polished concrete at \$2 per square foot or less because of their arsenal of equipment. We prefer the \$10+ per-square-foot projects," says Harris. The residential side of the business also offers installers the ability to perform more custom color and design work. "Our company has been able to capitalize on the residential and light commercial markets focusing on higher-end polished projects including decorative score cuts with an array of colors, along with specialty graphics," says Harris.



ROSEBUD CONCRETE

The ability to manipulate plain gray concrete to achieve various design elements is one of the benefits that makes polished concrete so versatile and adds to its popularity among designers and homeowners.

TREND:

MINIMALIST DESIGN

As a whole, the polished concrete industry tends to be simplistic when it comes to design and style. The most popular color is natural gray concrete, with a vast majority of polished floors not utilizing any color or other design elements. "The reality is that a majority of the polished market is considered very minimalistic when it comes to colors and design," says Harris.

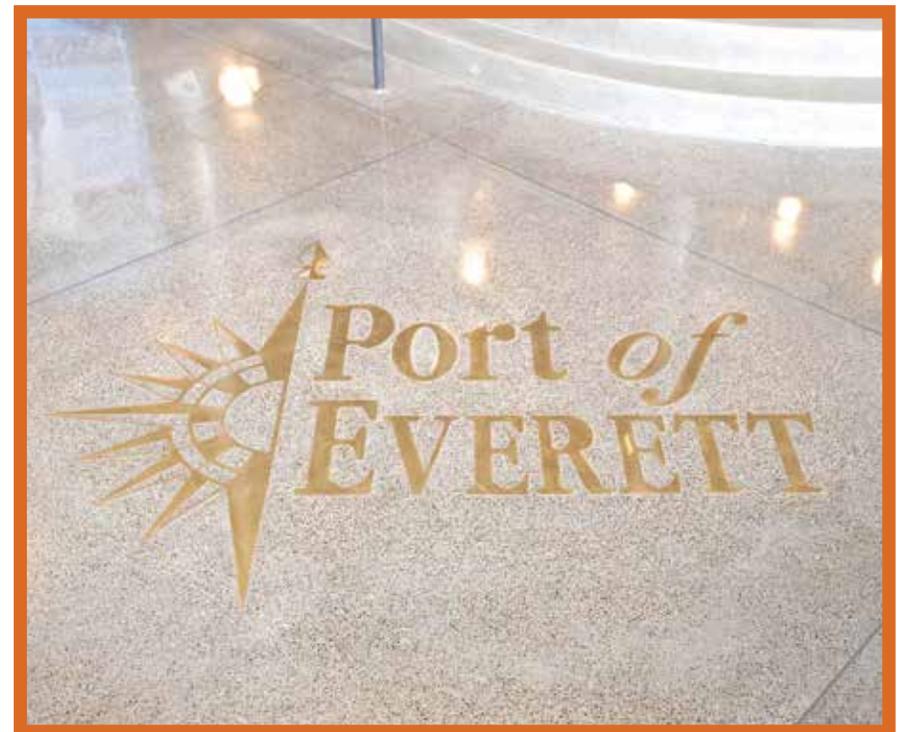
The clean and simple industrial look is a popular trend with both commercial and residential construction, and polished concrete fits nicely into that design mode. The ability to manipulate plain gray concrete to achieve various design elements is one of the benefits that makes polished concrete so versatile and adds to its popularity among designers and homeowners. Polished concrete can range from a paste polish, where the final color is uniform with no aggregate visible, all the way to a deep polish where large aggregate is exposed, closely resembling terrazzo. "Most of our customers want a salt and pepper finish," says Chris Raiser, manager of Extreme Polishing, a distribution outlet in Deerfield Beach, Fla., specializing in polished concrete equipment and chemicals. This type of finish is produced by removing a very thin top layer of the concrete during the initial grinding process to expose some of the sand aggregate. The exposed sand resembles salt and pepper and provides a nice color accent to the concrete without the addition of stains or dyes. Raiser also says they are seeing a trend where clients are switching to deep polished concrete to achieve the look of terrazzo at a lower cost.



CHENG DESIGN

While coloring polished concrete is still an emerging trend, the vast color palette and endless design opportunities give installers of polished concrete floors many options to choose from. In fact, polished concrete has been one of the driving forces behind the growth in the popularity of concrete dyes. The smaller particle size and better solubility of a dye compared to a stain allows for deeper penetration and stronger, more vivid color development. Another benefit of dyes is that many are suspended in acetone or alcohol. These solvents have very low surface tension compared with water, which allows them to penetrate much deeper into the concrete and dry quickly. When the conditions are right, dyes can be a great way to create amazingly colorful polished floors.

Logo and stencil work is another area where polished concrete is seeing exciting growth. The smooth finish of polished concrete lends itself well to stencils, allowing for very intricate designs to be applied. Companies who see the value of polished concrete as a flooring option also see the benefit of having their company logo or other marketing message etched or colored into the concrete. "Occasionally we will find a client that wants to take the floor over the top with intricate saw designs or graphics, like engraving rivers into the floor or decorative stenciling," says Harris. A real advantage of stencils is that the design is permanent and becomes part of the concrete. The logo or message takes on the luster and shine of the polished concrete, giving the effect that the design is in or below the concrete surface.



DECO-POUR

Logo and stencil work is another area where polished concrete is seeing exciting growth.



HTC PROFESSIONAL FLOOR SYSTEMS

TREND:

NEW DEVELOPMENTS IN EQUIPMENT

The polished concrete industry has come a long way in the last 10 years, offering more equipment options to accommodate various job demands and budgets. Raiser, who deals with many different installers, all running different brands and sizes of polishing equipment, sees a lot of companies starting out with small machines because they cost less and are a great way to enter the industry. As the company grows and the size of the jobs they take on gets bigger, they replace the smaller models with larger equipment and use the small machines for doing edges and working in tight spaces.

According to Walker, the weight of the machine is very important when polishing, especially on hard, dense concrete. It can make a big difference in how many hours are spent on the floor, which translates to less labor and reduced wear and tear on the machine. "We get 2,500 hours of working time from our machines before we need to do any major maintenance or repair work," he says.

Another factor important to installers is how easy the equipment is to operate. Peachey, whose company uses HTC machines, says the equipment seems to be getting more user-friendly. They run their HTC 500 and 800 series machines along with HTC tooling. "We see an advantage to running the same equipment and tooling," he says.

Harris also sees the benefits of using equipment from a manufacturer who offers a complete package. "The reality of the equipment side of the business boils down to what kind of complete package does the manufacturer have to offer," he says.

The service and training offered by the manufacturer after the sale are also important. Many companies offer these services, but they are not all the same. Be sure to do your homework before making a purchase, especially on big-ticket equipment.

Although large machines work well in open spaces, they don't work well along edges against existing walls, leaving anywhere from a few inches to almost a foot that need to be polished by hand or with a smaller machine. "The two main ways we address edges, short of making them decorative, is the old traditional way—which is on your hands and knees with hand-held edge grinders—or the less backbreaking way using the HTC 270 walk-behind edge grinder," says Harris.

The old-school method of working on your hands and knees is giving way to advances in smaller machines that operate standing up. Walker says that they used to charge extra for edge work because it was so tedious and labor intensive. Now it's just part of the job because they have more efficient equipment.

How you tackle edges has become more about working smarter than harder. "It boils down to the configuration of the rooms and how much straight wall there is as to why we would use one method [hand held vs. upright machine] over the other. More often than not, we use a combination of both methods," says Harris.

Although electric polishing equipment still dominates the industry, some installers are trending toward propane-powered polishers. "The main selling point of the propane unit is that you do not have to fight with power cords," says Harris. Another selling point is that you don't need the external generators often required to run larger electric-powered machines. Although propane-powered equipment does not have cords or generators, they can produce harmful emissions when operated inside buildings with poor ventilation. Propane machines can also be louder and require more maintenance than electric polishers.

The old-school method of working on your hands and knees is giving way to advances in smaller machines that operate standing up.



DECORATIVE CONCRETE INSTITUTE



“Today’s market offers an array of diamonds that can increase production and remove scratches more effectively, not to mention last longer.” — BOB HARRIS

TREND:

DIAMOND TOOLING

Aside from the actual polishing machine, the diamond tooling is the most important part of the equipment package. It is the interface between the machine and the concrete and determines the scratch pattern and final look of the polished floor. According to Talbot, each diamond pattern and grit imparts a scratch to the floor. The goal is for the entire floor to have the same identical scratch pattern so you achieve a uniform look and luster. “The next level of diamond tooling removes the previous scratch pattern and imparts the new grit or scratch pattern,” he says. This process of removing the previous level of scratches and imparting a finer level of scratches is how a floor gets polished. That is why it’s critical to have quality diamond tooling, since poor-quality diamonds will result in nonuniformity in the polished finish.

“It’s the diamond tooling that is the workhorse and can make the difference between being profitable or not,” says Harris. “Back when we started, there were very few choices with regard to tooling. Today’s market offers an array of diamonds that can increase production and remove scratches more effectively, not to mention last longer.”



WERKMASTER

The hottest trend in diamond tooling is the use of diamond-impregnated pads.

Walker has improved his efficiency by using transitional diamonds, also known as hybrid diamond tooling, on certain projects. Hybrid diamond tooling combines the deep cutting and grinding action of metal tooling with the softer polishing action of resin tooling. These hybrid tools have made the transition from the metal grinding steps to resin polishing steps easier and faster.

The hottest trend in diamond tooling is the use of diamond-impregnated pads. These lower-cost pads come in many sizes and work with different types of machines. When used properly and in the right scenarios, the pads last longer than traditional diamond tooling and are much easier to work with. "The evolution of the hybrid and transitional tools has dramatically improved the quality of the polish," says Harris. But if not used properly, diamond-impregnated pads can create a problem on polished floors. Some installers skip the critical early grinding stages and use the pads as a shortcut to the higher polish grits, resulting in a poor-quality polish that doesn't hold up as well. This low-end polish has eroded some of the confidence in polished concrete.



DECORATIVE CONCRETE INSTITUTE

TREND:

WET VS. DRY POLISHING: TAKING A HYBRID APPROACH

Polishing concrete is a process that can take place wet or dry. Depending on who you talk to and what region of the country you are in, one process seems to rule over the other. Both have their pros and cons, but in the end, they each produce a high-quality polished floor when done properly.

"You see a lot of the old-school terrazzo guys use a wet polish because that is what they are used to," says Walker. The advantages of wet polishing include a reduction in airborne dust and less wear and tear on diamond tooling because of cooler processing temperatures.

On the other side of the fence, those that prefer dry polishing claim that the wet process consumes a lot of water, especially on large jobs, and produces a significant amount of waste slurry that is not always easy to dispose of. "Environmental issues are a growing concern, and disposing of slurry from wet polishing is becoming an issue," says Walker.



FLOOR RESCUE

Many installers have adopted a hybrid approach to polishing. They prefer one process over the other, but remain flexible and are willing to adapt when the situation warrants.

Dry polishing may not consume water, but it does produce a significant amount of airborne contamination—enough so, that many commercial jobs require dust collection on the job as part of the polishing process. This almost mandates that if you are going to polish dry, you will need to own vacuum equipment. “Vacuum equipment has gotten much better,” says Walker. “Hepa filters and better pull make vacuum equipment that is lasting longer.” One of the reasons some contractors prefer dry over wet polishing systems is the ability to dispose of the waste more easily. The downside to dry polishing is the cost associated with having to own and operate vacuum equipment as well as increased tooling costs, since dry polishing tends to consume diamond pads faster than wet polishing.

Many installers have adopted a hybrid approach to polishing. They prefer one process over the other, but remain flexible and are willing to adapt when the situation warrants. “We wet grind the floor open on a lot of our jobs, then switch over to dry polish for the rest of the job,” says Walker. This strategy of doing what works best in a particular situation seems to be common among polishing contractors who are not married to one process.



EVOLUTION INDUSTRIES



TREND:

DENSIFIERS AND STAIN GUARDS

Chemical densification is arguably the most critical step in achieving long-term durability and shine on a polished concrete floor. The process involves applying a reactive metallic silicate to the concrete to increase the amount of calcium silicate hydrate in the concrete surface, which is what gives concrete its strength and durability. It also allows for the development of shine and luster through the mechanical polishing process.

The two most commonly used densifying chemicals today are sodium and lithium. Sodium has been around the longest and is considered the cost-effective workhorse of penetrating densifying sealers. Lithium is a more recent product, but has garnered a large following with claims of deeper penetration due to a smaller particle size, resulting in a more durable polished surface. On-the-job performance and cost are the biggest factors contractors consider when selecting what densification system to use, with lithium-based systems typically priced higher than sodium-based systems.

In regard to performance, there is still debate as to which system works better. Some contractors have a preference based on personal experience while others do not take sides and feel that it is less about the system and more about when and how much chemical is used. According to Walker, the key to success is to densify as much as possible. "Densifying is less about the product, but rather how much is used. The more you densify the better your floor," he says. Walker is a big proponent of reading the floor to understand what chemicals to use and when to apply them. He prescribes to the process of flooding the floor initially with a lower-cost sodium-based densifier, then switching to a higher-cost lithium densifier, which allows him to use less material during the higher-grit polishing steps. Talbot is another who emphasizes quantity over chemistry. "It is more important to use enough. If you're not, you're not hardening the floor," he says.

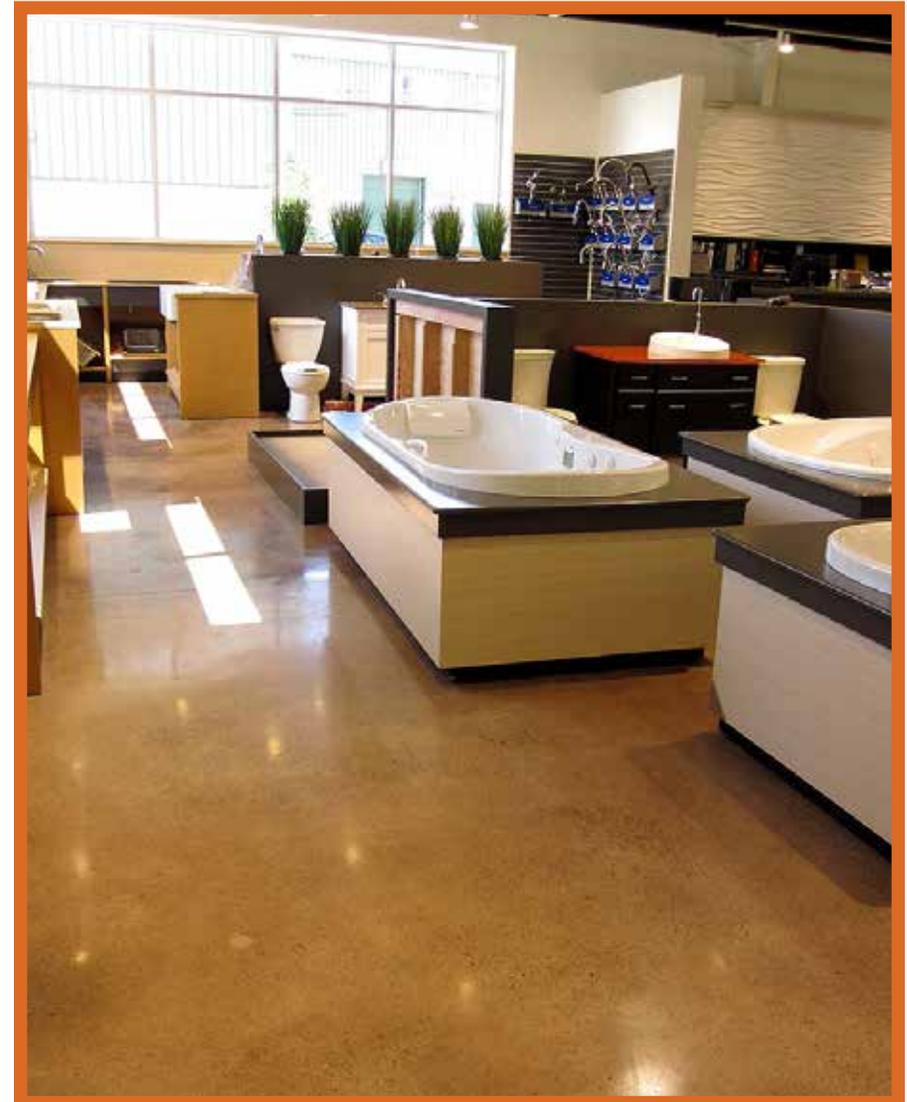
Guards for polished concrete are also a source of debate.

“Theoretically, you are now adding something topically to the polished floor,” which is often sold as a floor free of any sealers or coatings, says Harris. While the debate rages on, the use of guards has increased to where most polished floors are getting some type of final stain guard or sealer to help protect against certain stains and increase the shine of the floor.

Polished concrete stain guards are typically low-solids acrylic, polyurethane or epoxy systems, or blends of resins, designed to form a very thin micro-film on the surface of polished concrete. This thin film protects against stains that can etch or change the profile of the surface. Guards are often used when the polished floor is colored with a dye or stain. “We recommend guards for use on colored floors as they help pull more color and increase brightness,” says Talbot.

One of the downsides of using guards is overapplication. “The problem I see many contractors make is either overapplying or using these products to obtain a false shine or cover blemishes, such as scratches,” says Harris. In certain cases, he will even take gloss readings before and after applying guard to ensure they are getting the proper shine from the polishing process and not just the guard.

According to Peachey, guards will provide some level of protection from wear and tear, but will not block certain stains. “We don’t sell polished concrete as a stain-proof floor,” he says.



CONCRETE POLISHING & SEALING

CONCLUSION:

WHAT DOES THE FUTURE LOOK LIKE FOR POLISHED CONCRETE?

Everyone I spoke with only sees continued growth in the polished concrete industry, with no signs of things slowing down. “We have not even scratched the surface of where the industry can go,” says Harris. Talbot says that the design community has embraced polished concrete and we are now seeing more new construction specifications calling out polished concrete over traditional hard flooring materials and systems.

Many companies have invested a big part of their future in polished concrete, anticipating ample room for growth. “Polished concrete will be 50% of my growth this year,” says Walker. Contributing to this broad acceptance of polished concrete are its green attributes. It is an environmentally friendly process with low VOC emissions and it contributes toward many Leadership in Energy and Environmental Design (LEED) categories. “Polished concrete will only grow as it rides the green building trend,” says Raiser.

The most difficult part of the rapid growth in the industry will be managing expectations and assuring consistency across the market. It is critical for the industry as a whole to maintain profitability, as the pressure to provide more for less will undeniably follow. We can already see signs of price and quality erosion, as substandard surface polishing has made its way into some larger mainstream projects. The fallout is not always obvious and may take months or years to fully materialize.

The reality is that it takes years to become an overnight success. For the new generation of polishers thinking that this is their chance to obtain the pot of gold at the end of the rainbow quickly, and without paying their dues, think again. Even with the inevitable economic pressures that the industry must face, the future looks amazing as the U.S. market slowly wakes up to the benefits and potential of polished concrete. Advancements in both equipment and chemicals, along with education, have had a positive impact on overall product quality.

Over the last 10 years, polishing has evolved from a hard, fast set of rules on when to apply chemicals and color to a flexible approach that involves reading the concrete at all steps along the way.

TECHNIQUES AND STRATEGIES FOR SUCCESS

If there ever was a place where art and science come together in decorative concrete, the polished concrete industry is it. The process of when, how and what in regard to actually polishing the floor is as much an art form as it is a set of steps to achieve an end result. After the initial set of grinding or cutting steps, followed by polishing with a chemical densifier, artistic license takes over, with each installer following his own recipe that has evolved from years of trial and error. "Polishing is an art form - the floor will dictate the type of diamonds that need to be used and if a wet or dry polish is required," says Talbot.

Harris has a similar philosophy when it comes to the actual process of polishing. "I let the concrete dictate to me when to densify and add color. This starts with having an understanding of the differences between soft, medium, medium hard, hard or excessively hard concrete," he says.

Over the last 10 years, polishing has evolved from a hard, fast set of rules on when to apply chemicals and color to a flexible approach that involves reading the concrete at all steps along the way, allowing the installer to make changes to the process on the fly as the concrete dictates. "It really depends on the circumstance," says Harris.



WERKMASTER HARDNESS MAP

WERKMASTER HARDNESS TEST KIT

Harris recommends that installers bring a complete “tool box” of diamond tooling when mobilizing on a project so they avoid trying to get the floor to fit the tooling. This also holds true for matching your equipment to the size of the job. A common mistake for companies new to polishing is that they do not have the right number or size of polishing equipment for the job at hand. “In other words, don’t attack a floor with a machine that has a grinding width of 20 inches on 60,000-square-foot project,” he says.

One area that affects all decorative concrete installers is the ability to have access to the floor for the time required to complete the project, without competing against other trades. This is especially critical with polished concrete because of the large equipment moving across the floor and the constant application of chemicals. “It needs to be spelled out up front that when working on certain sections of floors you need to have sole access,” says Harris.

Because of the rapid growth of polished concrete over the last few years, the number of new installers entering the market has skyrocketed. This influx has driven some installers to cut their prices and offer what is called a “topical polish” in an effort to compete. This low-end polish, which typically includes only two diamond grinding steps followed by the application of a guard sealer, results in a cheap, poor-quality polished floor requiring a lot of maintenance. “True polished concrete includes multiple steps of honing and grinding, chemical densification, and final polishing that will require a low level of long-term maintenance,” says Talbot. The result is a concrete floor that is both mechanically and chemically dense, with a high level of resistance to staining and the desired level of shine and luster. The current trend with fully polished concrete is to take the floor to a final grit level of 800 to 1,800. A full floor polish, no matter the final level of shine reached, will perform better than a superficial topical polish.



CONCRETE POLISHING & SEALING

“The best teacher is still experience. Having the right equipment and knowledge is key.”

— MOSE PEACHEY

CONTINUING EDUCATION IS KEY TO INDUSTRY GROWTH

When I asked leading installers involved with polished concrete for their thoughts on what area needed the most improvement to keep the polished concrete industry growing, most agreed that continuing education in all facets of polishing and for all parties involved was the most important area that needed improvement.

Continuing education is a big part of Walker's business plan when it comes to polished concrete. He is constantly attending training classes put on by equipment and chemical manufacturers so he and his crews can learn all aspects of what is new in polishing concrete. “We never stop learning the process and products,” he says.

Rosebud Concrete has won multiple national-recognition awards for polished concrete projects they have completed in recent years. They, like a lot of polished concrete installers, believe that nothing beats time on the floor behind a machine. “The best teacher is still experience,” says business partner Mose Peachey. “Having the right equipment and knowledge is key.”



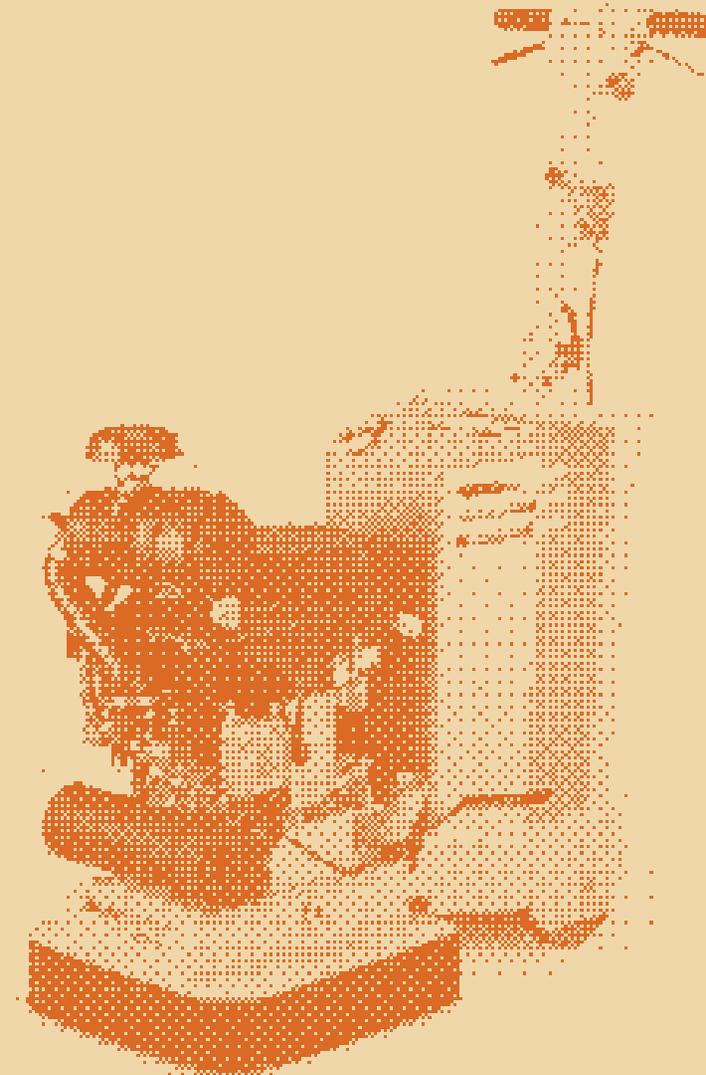
ROSEBUD CONCRETE

Harris feels the biggest improvements can come from educating the design community. "By making them aware of all of the wonderful attributes polished concrete has to offer, I can foresee a time in the near future where these floors could become the number one flooring material of choice," he says.

With polished concrete experiencing such rapid market growth in a short period of time, the quality of the installation can vary greatly. Talbot wants to see installers better educated on the different types of polished concrete so they can better manage their customers' expectations. "We need to get back to the roots of the industry - scratch pattern, chemicals and overall quality," he says.

Walker wants to see better education not only for the polishing contractor, but for the concrete finishers and general contractors on polishing projects. When all the trades involved with the concrete on a polished concrete project better understand how the system works and why it's important to have the floor at a certain flatness, they tend to care more and the overall product quality increases.

Mose Peachey says that better education after the installation needs improvement. He wants to see the industry get better about understanding maintenance and what is involved to keep the floor looking good for years to come. This fits in with managing expectations and educating the design community. Currently there is a perception that polished concrete is a zero-maintenance floor, and that is not the case. That's why Rosebud spends a fair amount of time educating their clients on what to expect. "Have a good maintenance plan, and present it to your customer," says Peachey



RESOURCES:

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THE END