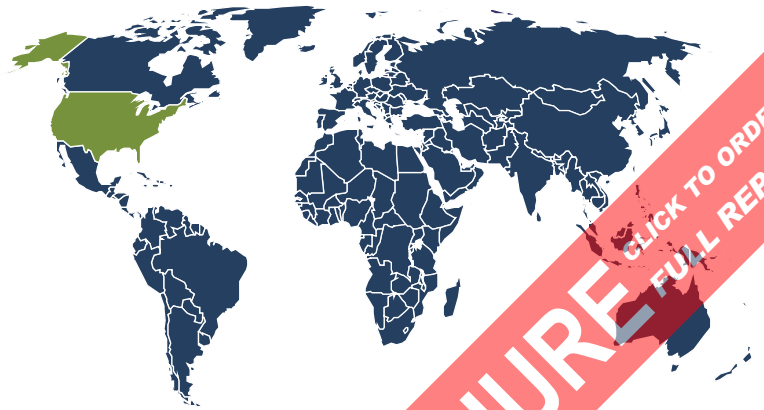




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Behind the Wall Plumbing: United States

July 2018



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About This Report

Scope & Method

This report forecasts to 2022 US behind the wall (BTW) plumbing demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- pipe
- fittings
- valves
- fire sprinklers

Total demand is also segmented by application as follows:

- fire suppression systems
- distribution
- drain, waste, and vent (DWV)
- radiant flooring

Finally, total demand is segmented by market in terms of:

- commercial buildings
- residential buildings

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; shipments and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Behind the Wall Plumbing: United States (FF60087) is based on *Behind the Wall Plumbing in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | NAICS & SIC Codes Related to BTW Plumbing

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
326122	Plastics pipe and pipe fitting manufacturing	3084	Plastics pipe
326191	Plastic plumbing fixture manufacturing	3088	Plastics plumbing fixtures
326199	All other plastic products manufacturing	3089	Plastics products, NEC
331210	Iron and steel pipe and tube manufacturing from purchased steel	3317	Steep pipe and tubes
331511	Iron foundries	3321	Gray and ductile iron foundries
332913	Plumbing fixture fitting and trim manufacturing	3322	Malleable iron foundries
332919	Other metal valve and pipe fitting manufacturing	3432	Plumbing fixture fittings and trim
332996	Fabricated pipe and pipe fitting manufacturing	3494	Valves and pipe fittings, NEC
332999	All other miscellaneous fabricated metal product manufacturing	3498	Fabricated pipe and pipe fittings
		3499	Fabricated metal products, NEC

Source: US Census Bureau

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Resources

The Freedonia Group

Behind the Wall Plumbing in the US, July 2018

Freedonia Industry Studies

Countertops Market in the US, February 2018

Home Kitchen & Bathroom Remodeling, March 2018

Global Plumbing Fixtures & Fittings Market, November 2017

Cabinets Market in the US, September 2017

Plumbing Fittings Market in the US, August 2017

Plumbing Fixtures Market in the US, June 2017

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Valve

Agencies & Associations

Home Fire Sprinkler Coalition

Home Improvement Research Institute

Joint Center for Housing Studies of Harvard University

National Association of Home Builders

National Association of the Remodeling Industry

About This Report

National Fire Sprinkler Association
National Kitchen & Bath Association
Plumbing-Heating-Cooling Contractors Association
Radiant Professionals Alliance
United States Census Bureau
United States Department of Energy
Valve Manufacturers Association of America