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# World Plumbing

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Industry Study with Forecasts for **2010 & 2015**

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*Demand for bathtubs and showers is expected to enjoy the fastest growth among plumbing fittings worldwide through 2010, with gains of 5.0 percent per year to over \$6 billion.*

## World demand to rise 5% annually through 2010

Global demand for plumbing products is projected to expand 5.0 percent annually through 2010 to almost \$55 billion. The pace of growth will be most rapid in the developing countries of Asia, Eastern Europe and the Africa/Mideast region, where rising incomes and surging residential and nonresidential building construction activity will bolster demand for plumbing fixtures and fittings. Another growth factor will be efforts in numerous developing countries to modernize sanitation and water delivery systems.

## Asia, Eastern Europe to lead gains by region

Within the Asia/Pacific region, the strongest gains in demand for plumbing products will be in China, with continued double digit growth; and in India. Increases in disposable income for middle-class households will support demand for higher quality and higher value plumbing products. Initiatives to improve water systems in rural areas will further aid demand, although primarily for entry-level plumbing products. Rising incomes in other developing countries in Asia, such as Malaysia and Indonesia, will bolster residential applications of plumbing products in conjunction with the construction of new housing.

Demand for plumbing products in Eastern Europe is also forecast to exceed that of the developed regions. Robust residential construction demand in the



region will offer opportunities. Improvement and repair demand will also be strong in Eastern Europe as municipalities and building owners seek to refurbish buildings constructed shortly after the end of the Second World War.

In contrast to developing regions, gains for plumbing products in industrialized countries will be substantially slower. The maturity of the building infrastructure in many of these countries limits the opportunities in new construction, so that repair and improvement accounts for a higher share of demand. Therefore, suppliers of plumbing products need to appeal to aesthetic concerns to generate replacement demand for existing plumbing fixtures and fittings.

## Bathtubs, showers to be fastest growing fittings

Among the different types of plumbing fittings, demand for bathtub and shower fittings is expected to enjoy the fastest growth through 2010, with gains of 5.0 percent per year to over \$6 billion. Advances will be helped by new building construction, especially in developing countries, which will lead to new installations of lavatories and their associated fittings. Concerns about conserving water will also aid demand for lavatory faucets in nonresidential installations, with products such as sensor-operated, hands-free faucets becoming more popular worldwide.

## Sample Text, Table & Chart

### OTHER REGIONS

#### Poland: Plumbing Product Demand by Market

Demand for plumbing products in Poland is forecasted to increase 5.4 percent per year to nearly \$1.5 billion in 2010. That represents an acceleration from the 2000-2005 period, when growth in construction was slow. The new housing market, especially in the east, was somewhat stagnant in 2003 that was followed by a rebound in both new and residential construction in advance of the European Union, which caused an increase in value-added tax. Growth in the forecast period is expected to rebound in both new and residential construction.

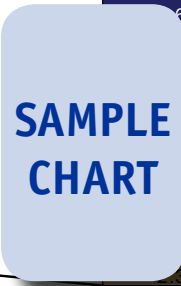
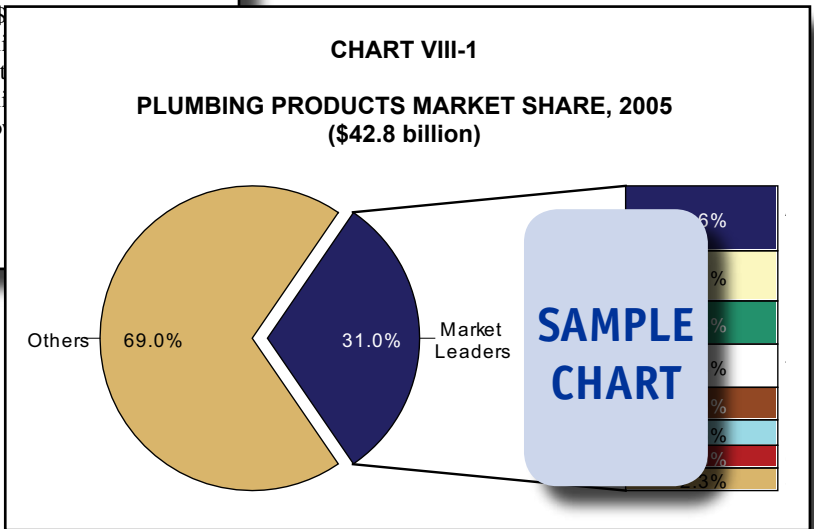
Through the 2000s, construction of plumbing fixtures will provide the primary demand, with gains of 5.4 percent annually to more than \$1 billion. Rising incomes will provide the wherewithal for individuals looking to improve their living spaces to purchase or construct new housing. Renovation of single-family houses will be a source of retrofit demand for plumbing fixtures and fittings, especially for buildings built prior to the Second World War.

Demand for plumbing products in nonresidential markets in Poland is expected to increase 5.4 percent per year to nearly \$1 billion in 2010. Gains will be greatest in new construction applications as a portion of the market rebounds from the weakness of the 2000-2005 period. Consumption in repair and improvement applications will gain in the new nonresidential segment, although growth will be slower through 2010.

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**TABLE VII-16**  
**POLAND PLUMBING PRODUCT SUPPLY & DEMAND**  
 (million dollars)

Item	1995	2000	2005	2010	2015
Bldg Constr Expend (bil 2000\$)	17.3				
\$ plumbing prdt/000\$ construct	14.43				
Plumbing Product Demand	249.7				
Fixtures:	108.4				
Bathtubs & Showers	42.1				
Toilets	27.9				
Sinks	24.6				
Other	13.8				
Fittings:	141.3				
Bathtub & Shower	37.7				
Lavatory	36.7				
Kitchen & Other Sink	33.6				
Other	33.3				
net exports	-32.0				
Plumbing Product Manufacturing	217.7				



## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Corporacion Empresarial Roca SA

Avenida Diagonal 513  
 08029 Barcelona  
 Spain  
 34-93-366-1200  
<http://www.roca.es>

Annual Sales: \$1.2 billion (2007)  
 Employment: 1,200 (2007)

Key Products: Roca Sanitario, Roca Aire Acondicionado, Roca Ceramica, Roca Calefaccion, Roca Fittings, kitchen sinks, showers and related components, bathtubs, whirlpool spas, toilets, bidets and lavatories.

Corporacion Empresarial Roca is a privately held producer of heating and air conditioning equipment, ceramic sanitary ware, and ceramic floor and wall tile. The Company is divided into four operating companies: Roca Sanitario, Roca Aire Acondicionado, Roca Ceramica and Roca Calefaccion. Operations are conducted in more than 80 countries worldwide.

The Company competes in the plumbing products market via Roca Sanitario SA (Spain), a producer of kitchen and bathroom fixtures and fittings, including kitchen and bathroom faucets and other fittings, kitchen sinks, showers and related components, bathtubs, whirlpool spas, toilets, bidets and lavatories. These items are marketed under such brand names as VERANDA, LIBERTY, VERONICA, GEORGIA, SIDNEY, CIVIC, MERIDIAN, DAMA, GIRALDA and VICTORIA. The Company's kitchen and bathroom faucets and other fittings encompass thermostatic, single-lever, quarter-turn, half-turn, conventional, electronic, self-closing, hand shower, shower head, bath mixer

**SAMPLE  
 PROFILE**

TABLE VII-15

### POLAND PLUMBING PRODUCT DEMAND BY MARKET (million dollars)

Item	1995	2000	2005	2010	2015
Population (millions)	38.6				
GDP/capita	7690				
Gross Domestic Prdt (bil 2000\$)	297				
\$ plumbing prdt/capita	6.5				
\$ plumbing prdt/mil \$ GDP	841				
Plumbing Prdt Demand by Market	249.7				
Residential:	162.1				
New	16.3				
Repair & Improvement	145.8				
Nonresidential:	87.6				
New	24.5				
Repair & Improvement	63.1				

**SAMPLE  
 TABLE**

"Demand for plumbing products in non-residential markets in Poland is expected to increase 5.4 percent per year to nearly \$165 million in 2010. Gains will be greatest in new construction applications, as that portion of the market rebounds from the weakness of the 2000-2005 period. Consumption in repair and improvement applications will lag gains in the new nonresidential segment, although..."

--Section VII, pg. 233



**OTHER STUDIES**

**Industrial Valves**

US industrial valve demand will top \$16 billion in 2011, driven by the construction and public utilities markets. Imports will approach 60% of demand. Key export markets include Canada, Mexico, Western Europe, and the Asia/Pacific and Africa/Mideast regions. Steel and alloys will remain the dominant valve material. This study analyzes the \$13.9 billion US industrial valve industry, with forecasts for 2011 and 2016 presented by type and market. It also evaluates market share and profiles major manufacturers.

#2205 ..... 05/2007..... \$4400

**Filters**

US filters demand will grow 4.2% yearly through 2011. Gains will be driven by ongoing sales in the dominant aftermarket, pending laws for cleaner air and reduced emissions, as well as increasing penetration of motor vehicle cabin air filters and home air and water filters. Fluid filters will remain the largest segment while air filters will grow the fastest. This study analyzes the \$9.8 billion US filter industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading competitors.

#2164 ..... 04/2007..... \$4500

**Plastic & Competitive Pipe**

US pipe demand will reach 16.7 billion feet in 2011. Gains will be driven by heightened energy demands, the growing obsolescence of sewer and drainage systems, and needs to upgrade municipal water systems. Steel pipe will exhibit the fastest growth due to opportunities in energy and potable water markets. Construction will remain the largest application. This study analyzes the US pipe industry to 2011 and 2016 by material and application. It also evaluates company market share and profiles major producers.

#2172 ..... 03/2007..... \$4600

**World Plastic Pipe**

Global demand for plastic pipe will grow 4.4% annually through 2010 based on better prospects in developed nations coupled with continued strong growth in many developing countries, particularly China. Plastic pipe used for potable water delivery, drainage and sewage applications, and natural gas distribution will support growth. This study analyzes the 6.2 billion meter world plastic pipe industry to 2010 and 2015 by material, world region and for 23 countries. It also details market share and profiles major firms.

#2127 ..... 11/2006..... \$5400

**Consumer Water Purification & Air Cleaning Systems**

US consumer water and air treatment system demand will grow 4.7% yearly through 2010. Gains will be driven by home air and water quality concerns, quieter and more user-friendly systems, and better filter replacement compliance. Conventional types will remain dominant while higher value systems lead gains. This study analyzes the \$1.3 billion US consumer water purification and air cleaning system industry to 2010 and 2015 by product, market and region. It also details market share and profiles major players.

#2088 ..... 09/2006..... \$4400

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