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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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Plumbing Fixtures & Fittings

US Industry Study with Forecasts for **2011 & 2016**

Study #2306 | February 2008 | \$4700 | 391 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview	5
Consumer Income & Spending	9
Personal Income & Expenditures	10
Consumer Financing	12
Demographic Trends	16
Building Construction Trends	19
Residential Construction	22
Housing Overview	24
Housing Completions	26
Residential Floor Space	28
Housing Stock	29
Existing Home Sales	30
Households	30
Bathroom Trends	31
Improvements & Repairs	32
Nonresidential Construction	34
Construction Expenditures	34
Improvements & Repairs	36
Manufacturing Outlook	37
Pricing & Product Mix	41
Historical Market Trends	44
Environmental & Regulatory Considerations	47
Plumbing Codes	47
Water Conservation Regulations & Standards	48
Toilet Fixtures	49
Shower Fixtures	51
Lavatory Fixtures	52
EPA Programs	52
Drinking Water Quality	53
Americans with Disabilities Act	54

OVERVIEW

General	55
Supply & Demand	57
Foreign Trade	60
Imports	61
Exports	64
World Plumbing Product Outlook	67

FIXTURES BY MATERIAL

General	69
Vitreous China	74
Product Characteristics	76
Suppliers	76
Plastics	77
Fiberglass	81
Cast Polymer	83
Acrylic	86
Other Plastics	89
Metal	91
Cast Iron	94
Steel & Other Metals	97
Other Materials	101

FIXTURES BY TYPE

General	104
Supply & Demand	105

Plumbing Fixture Overview	108
Bathtub & Shower Fixtures	112
Bathtubs	115
Whirlpool Bathtubs	118
Shower Stalls & Receptors	122
Bathtub & Shower Enclosures	125
Sink Fixtures	127
Lavatories	130
Kitchen Sinks	134
Other Sinks	137
Toilet Fixtures	139
State & Federal Regulations	141
Voluntary Performance & Water Saving Programs	142
Water Closet Bowls	144
Flush Tanks	148
Urinals	150
Other Plumbing Fixtures	154
Hot Tubs & Spas	156
All Other Plumbing Fixtures	158
Drinking Fountains	158
Bidets	159
Plumbing Fixture Market Share	160
Kohler	161
Masco	161
American Standard	162
Jacuzzi	162
Other Leaders	163

FITTINGS

General	165
Bathtub & Shower Fittings	168
Antiscald Valves	170
Single Lever Controls	171
Showerheads & Fittings	173
Bathtub & Shower Combinations	175
Personal Showers	176
Other Bathtub & Shower Fittings	177
Lavatory Fittings	178
Two Lever Controls	180
Single Lever Controls	182
Other Lavatory Fittings	183
Kitchen & Other Sink Fittings	185
Single Lever Controls	188
Deck Faucets	189
All Other Sink Fittings	190
Other Plumbing Fittings	191
Lawn & Hose Fittings	193
Flush Valves & Controls	194
Sediment, Sill & Other Faucets	195
Drains & Overflows	195
ADA Accessibility Products	196
P & S Traps	197
All Other Plumbing Fittings	198
Plumbing Fittings Market Share	199
Masco	200
Kohler	201
Moen	201
Other Leaders	201

MARKETS

General	203
Residential	207
Demand by Type	208
Demand by Application	210
New	211
Improvement & Repair	212

Demand by Housing Type	215
Single-Family	217
Multifamily	219
Manufactured Housing	221
Nonresidential	223
Demand by Type	225
Demand by Application	227
New	227
Improvement & Repair	229
Demand by Building Type	230
Office & Commercial	231
Institutional	233
Industrial	235
Other	237
Other Markets	239

REGIONS

General	242
Regional Demographic & Economic Trends	243
Population Patterns	244
Economic Outlook	246
Construction Activity	248
Housing Trends	251
Regional Demand for Plumbing Products	253
Northeast	256
New England	258
Middle Atlantic	258
Midwest	259
East North Central	261
West North Central	262
South	263
South Atlantic	266
East South Central	268
West South Central	269
West	270
Mountain	273
Pacific	273

INDUSTRY STRUCTURE

General	276
Industry Composition	277
Market Share	280
Masco	281
Kohler	281
Moen	282
American Standard	282
Jacuzzi	283
Other Leaders	284
Product Development & Manufacturing	285
Competitive Strategies	287
Marketing	289
Distribution	291
Mergers & Acquisitions	293
Cooperative Agreements	296

COMPANY PROFILES

Acorn Engineering	299
Alcoa Incorporated	302
American Standard Americas	303
Black & Decker	308
Bradley Corporation	310
Briggs Plumbing Products	313
California Acrylic Industries	315
Crane Plumbing	317
Eljer Incorporated	319

(continued on next page)

(continued from previous page)

California Acrylic Industries	315
Crane Plumbing	317
Eljer Incorporated	319
Elkay Manufacturing	321
Fluidmaster Incorporated	324
Fortune Brands	325
Franke Holding	329
Geberit International.....	331
Globe Union Industrial.....	334
Grohe AG	338
Grupo Industrial Saltillo	340
Jacuzzi Brands.....	341
Jandy Pool Products	344
Kohler Company.....	345
MAAX Corporation	350
Mansfield Plumbing Products.....	353
Masco Corporation.....	355
Oatey Company.....	363
Rexnord LLC	365
Sloan Valve	367
Swan Corporation.....	369
Symmons Industries	371
T&S Brass and Bronze Works	372
Tomkins plc.....	374
TOTO Limited.....	377
Villeroy & Boch.....	379
Water Pik.....	382
Selected Other Companies Mentioned in Study.....	383

Cht Plumbing Product Imports by Product & Source, 2006	63
Cht Plumbing Product Exports by Product & Destination, 2006	66

FIXTURES BY MATERIAL

1 Plumbing Fixture Demand by Material Type.....	72
Cht Plumbing Fixture Demand by Material Type, 2006: Units Versus Value	73
2 Vitreous China Plumbing Fixture Demand by Product Type.....	75
3 Plastic Plumbing Fixture Demand by Material & Product Type.....	80
4 Fiberglass Plumbing Fixture Demand by Product Type.....	83
5 Cast Polymer Fixture Demand by Product Type.....	86
6 Acrylic Plumbing Fixture Demand by Product Type.....	89
7 Other Plastic Plumbing Fixture Demand by Product Type.....	91
8 Metal Plumbing Fixture Demand by Material & Product Type.....	94
9 Cast Iron Plumbing Fixture Demand by Product Type.....	97
10 Steel & Other Metal Plumbing Fixture Demand by Product Type.....	101
11 Other Materials Plumbing Fixture Demand by Product Type.....	103

FIXTURES BY TYPE

1 Plumbing Fixture Supply & Demand	107
Cht Plumbing Fixture Supply & Demand, 1996-2016	107
2 Plumbing Fixture Demand by Type.....	110
Cht Plumbing Fixture Demand by Type, 2006: Value Versus Units	111
3 Bathtub & Shower Fixture Demand by Type....	114
Cht Bathtub & Shower Fixture Demand by Type, 2006	115
4 Bathtub Demand by Material Type	118
5 Whirlpool Bathtub Demand by Material Type ..	122
6 Shower Stall & Receptor Demand by Material Type	125
7 Bathtub & Shower Surround Demand by Product & Material Type.....	127
8 Sink Fixture Demand by Type.....	129
Cht Sink Fixture Demand by Type, 2006	130
9 Lavatory Demand by Material.....	134
10 Kitchen Sink Demand by Material Type.....	137
11 Other Sink Demand by Material Type.....	139
12 Toilet Fixture Demand by Type	141
Cht Toilet Fixture Demand by Type, 2006	144
13 Water Closet Bowl Demand by Product & Material Type.....	147
14 Flush Tank Demand by Material Type.....	150
15 Urinal Demand	153
16 Other Plumbing Fixture Demand by Type	155
Cht US Plumbing Fixture Market Share, 2006	161

3 Lavatory Fitting Demand by Product Type.....	180
4 Kitchen & Other Sink Fittings Demand by Product Type.....	187
5 Other Plumbing Fittings Demand by Product Type.....	193
Cht US Plumbing Fittings Market Share, 2006	200

MARKETS

1 Plumbing Product Demand by Market.....	206
Cht Plumbing Product Demand by Market, 2006 ...	206
2 Residential Plumbing Product Demand by Product Type & Application	208
3 New Residential Plumbing Product Demand by Product Type.....	212
4 Residential Improvement & Repair Plumbing Product Demand by Product Type.....	215
5 Residential Plumbing Product Demand by Housing Type	216
6 Single-Family Housing Plumbing Product Demand by Product Type & Application	219
7 Multifamily Housing Plumbing Product Demand by Product Type & Application	221
8 Manufactured Housing Plumbing Product Demand by Product Type & Application	223
9 Nonresidential Plumbing Product Demand by Product Type & Application	225
10 New Nonresidential Plumbing Product Demand by Product Type.....	228
11 Nonresidential Improvement & Repair Plumbing Product Demand by Product Type.....	230
12 Nonresidential Plumbing Product Demand by Building Type.....	231
13 Office & Commercial Plumbing Product Demand by Product Type & Application	233
14 Institutional Plumbing Product Demand by Product Type & Application	235
15 Industrial Plumbing Product Demand by Product Type & Application	237
16 Other Nonresidential Plumbing Product Demand by Product Type & Application	238
17 Other Markets Plumbing Product Demand by Product & Market Type	241

REGIONS

1 Resident Population by Region	246
2 Gross Domestic Product by Region.....	248
3 Construction Expenditures by Region	250
4 Housing Indicators	253
5 Plumbing Product Demand by Region.....	255
Cht Plumbing Product Demand by Region, 2006 ...	255
6 Northeast Plumbing Product Demand by Subregion & Market	257
7 Midwest Plumbing Product Demand by Subregion & Market	261
8 South Plumbing Product Demand by Subregion & Market	266
9 West Plumbing Product Demand by Subregion & Market	272

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators	9
2 Personal Income & Expenditures	12
3 Consumer Financing Environment, 1996-2006 ..	16
4 Resident Population.....	19
5 Building Construction Expenditures	21
6 Residential Construction Expenditures.....	24
7 Housing Indicators	25
Cht Year of Construction of Housing Stock, 2006....	29
Cht Number of Bathrooms in New Single-Family Homes, 1996-2006	32
8 Residential Improvement & Repair Expenditures	33
9 Nonresidential Construction Expenditures	36
10 Nonresidential Improvement & Repair Expenditures	37
11 Manufacturers' Shipments	40
12 Selected Plumbing Product Prices.....	43
13 Plumbing Product Market, 1996-2006	46
Cht Plumbing Product Growth, 1997-2006.....	46

OVERVIEW

1 Factors Affecting Plumbing Product Growth through 2011.....	56
Cht Plumbing Product Supply & Demand, 1996-2016.....	59
2 Plumbing Product Supply & Demand	59
3 Plumbing Product Foreign Trade.....	61

FITTINGS

1 Plumbing Fittings Supply & Demand	167
Cht Plumbing Fittings Supply & Demand, 1996-2016.....	168
2 Bathtub & Shower Fitting Demand by Product Type.....	170

INDUSTRY STRUCTURE

1 Plumbing Product Sales for Selected Companies, 2006.....	278
Cht US Plumbing Product Market Share, 2006	281
2 Selected Acquisitions & Divestitures.....	295
3 Selected Cooperative Agreements.....	297

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Growth will be supported by increasing improvements and repairs in both residential and nonresidential construction, and by accelerating new nonresidential construction spending.

US demand to rise 2.7% annually through 2011

Demand for plumbing fixtures and fittings in the US is expected to advance 2.7 percent annually through 2011 to \$11.4 billion. Growth will be supported by increasing applications in improvement and repair markets in both residential and nonresidential construction and by an acceleration in new nonresidential construction expenditures. Gains will also be supported by ongoing trends toward larger bathrooms and kitchens in residential markets. These factors will help offset weak single-family housing completions and a moderation in raw material pricing for metal and plastic.

Plumbing fixtures to be outpaced by fittings

Demand for plumbing fixtures is forecast to advance 2.4 percent per year through 2011 to \$6.15 billion. Consumer interest in higher-end fixtures -- including whirlpool bathtubs, enhanced showers, and hot tubs and spas -- across all markets will aid value demand advances. Additionally, product developments aimed at adding value -- such as chromotherapy lighting and sound systems -- will bolster demand. Ongoing consumer interest in nontraditional materials (e.g., glass, concrete or teak) will also aid value growth. An increasing number of bathrooms per structure and larger kitchens and bathrooms in general will support unit sales.

Plumbing Fittings
46%

Plumbing Fixtures
54%

US Plumbing Product Demand (\$11.4 billion, 2011)



Demand for plumbing fittings is anticipated to expand 2.9 percent per year through 2011 to \$5.25 billion. Advances will be supported by new product developments -- such as a broader palette of finishes, electronic functionality and universally accessible control design. Consumer interest in higher-end amenities, particularly those with European influence, will bolster value growth as well.

Nonresidential, improvement/repair markets to be fastest growing

The residential market accounted for 69 percent of plumbing product demand in

2006. This segment will not, however, lead advances in the industry through 2011. Growth is anticipated to decelerate significantly from the 2001 to 2006 period, which was characterized by strong new housing construction. Single-family housing completions in 2011 are expected to be lower than in 2006. On the other hand, strong new construction spending will support plumbing fixture and fitting demand in the nonresidential market. Both the residential and nonresidential markets will see solid gains in improvement and repair activity going forward, providing growth opportunities for the plumbing product industry.

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Sample Text, Table & Chart

MARKETS

Improvement & Repair --Demand for plumbing products in nonresidential improvement and repair applications is anticipated to increase by \$1.2 billion. Advances in building construction will improve plumbing fixtures and fittings performance at a higher level, supporting building applications. Upgrades to existing facilities to attract or keep tenants, further benefitting demand for products. Increasing interest in water conservation, as well as governmental regulations regarding water use for fixtures and fittings will aid replacement demand.

SAMPLE TEXT

In 2006, plumbing fittings accounted for about half of demand, slightly edging out the fixture segment. Through 2011, fittings will marginally outpace that of fixtures, posting gains of 4.9 percent per year to \$1.2 billion. Advances will be bolstered by strong fixture demand and an increasing interest in higher-end fittings. Replacement of existing faucets with sensor-operated styles will continue due to water conservation concerns as well as concerns over cleanliness.

Demand for plumbing fixtures is forecast to advance 4.7 percent per year through 2011 to \$1.2 billion. Growth will be aided by the upgrading of existing facilities to compete with the specifications of new buildings that feature higher-end amenities. These new specifications may also include water use regulations that will bolster the use of very-low flow or waterless fixtures. Competition and differentiation among these and other establishments for tenants and customers will bolster demand for fixtures. Solid advances in the human-intensive office and institutional markets will also aid demand for plumbing fixtures. All major types of plumbing fixtures will see improving growth through 2011.

229

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TABLE VI-2

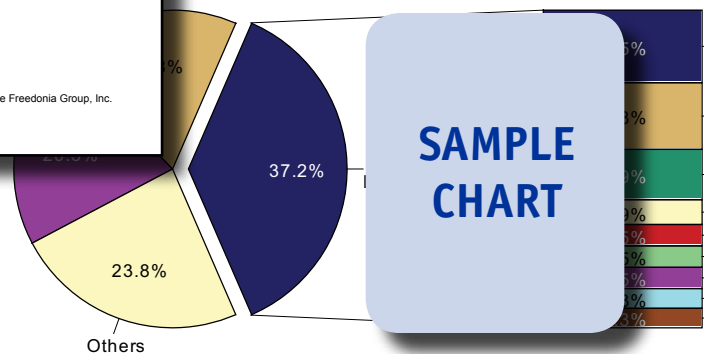
BATHTUB & SHOWER FITTING DEMAND BY PRODUCT TYPE
 (million dollars)

Item	1996	2001	2006	2011	2016
Bathtub & Shower Fixture Demand					0
Building Construction (bil \$)					5
\$ fittings/\$ fixtures					3
\$ fittings/000\$ construction					1
Bathtub & Shower Fittings Demand					0
Antiscald Valves					5
Single Lever Controls					5
Showerheads & Fittings					5
Bathtub & Shower Combinations					5
Personal Showers					5
Other Bathtub & Shower Fittings					5
- net imports					0
Bathtub & Shower Fittings Shpts					0

SAMPLE TABLE

CHART IX-1

PLUMBING PRODUCT MARKET SHARE, 2006
 (\$10 billion)

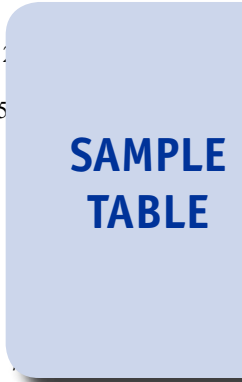


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-12
TOILET FIXTURE DEMAND BY TYPE
(million dollars)

Item	1996	2001	2006	2011	2016
Building Construction (bil 2000\$)					00
toilet units/mil \$ construction					9
Toilet Fixture Demand (000 units)	15				00
\$/unit					59
Toilet Fixture Demand					20
Water Closet Bowls					76
Flush Tanks					01
Urinals					43
- net imports					90
Toilet Shipments					30



COMPANY PROFILES

Briggs Plumbing Products Incorporated

300 Eagle Road
 Goose Creek, SC 29445
 843-569-
 http://w

Sales: \$
 Employe s Industriales SA)
 Key Pro kitchen sinks, bathtubs
 and fauc

Briggs Plumbing Products, a wholly owned subsidiary of the privately held Ceramicas Industriales SA (Chile), is a manufacturer of bathroom and kitchen fixtures for both residential and nonresidential use. The Company is one of the leading private US producers of plumbing products.

The Company is active in the US plumbing products through the manufacture and marketing of toilets, bidets, urinals, lavatories, kitchen sinks, bathtubs and faucets for the residential, commercial and hospital-ity markets. Fixtures are made using such materials as vitreous china, enameled steel, or the Briggs Plumbing's ULTRATUFF composite material, which consists of a porcelain-enameled finish on heavy-gauge formed steel that is reinforced with a thick polyurethane elastomer backing. Briggs Plumbing's manufacturing operations include a plant in Knoxville, Tennessee. The Company maintains distribution locations at its headquarters site in Goose Creek, South Carolina; at its manufac-turing site in Knoxville, Tennessee; and in Torrence, California.

Briggs Plumbing makes one- or two-piece toilets in elongated or round-front styles. These toilets are sold under such brand names as

"Demand for cast polymer plumbing fixtures is forecast to expand 2.9 percent per year through 2011 to 3.8 million units. Gains will slow from the 2001 to 2006 period, as the new residential housing market cools through 2011. Nevertheless, there are several factors supporting demand. In the resi-dential market, improvement and repair mar-kets will provide growth opportunities over the forecast period, aided by solid spending. Bathroom remodeling and a continuing trend toward multiple lavatory installations will benefit cast polymer fixture demand."

--Section IV, pg. 83

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OTHER STUDIES

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 01/2008..... \$4500

Residential Kitchen & Bathroom Countertops

US countertop demand will reach 540 million square feet in 2011, driven by the remodeling segment. Engineered stone and natural stone countertops will grow the fastest while laminate countertops will remain the market leader. Kitchen countertops will continue to outpace bathroom types. This study analyzes the \$12.7 billion US residential kitchen and bath countertop industry, with forecasts for 2011 and 2016 by material, product, market and region. It also evaluates market share and profiles major players.

#2237 10/2007..... \$4500

Gutters & Downspouts

US gutter and downspout demand will reach \$4.2 billion in 2011. Gutters will remain the dominant segment while gutter guards grow the fastest. Aluminum will stay the largest material type, with plastic growing the fastest from a small base. The much smaller nonresidential market will outpace the residential sector. This study analyzes the US gutter and downspout industry, with forecasts for 2011 and 2016 by product, material, market and region. It also evaluates market share and profiles major players.

#2226 08/2007..... \$4400

World Plumbing

Global demand for plumbing products will rise 5% annually through 2010. Growth factors include surging building construction in developing countries and plumbing modernization in developed regions. Bath-tub and shower fittings will lead gains while automatic lavatory faucets will benefit from water conservation concerns. This study analyzes the \$42.8 billion world plumbing industry for 2010 and 2015 by type, material, world region and for 22 countries. It also details market share and profiles major firms.

#2165 04/2007..... \$5500

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 for 2011 and 2016 by material and application. It also evaluates company market share and profiles major producers.

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

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