Plumbing Fixtures & Fittings

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

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INDUSTRY STRUCTURE

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.

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

TABLE VI-2

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

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

SAMPLE TABLE

MARKETS

Improvement & Repair --Demand for plumbing proc nonresidential improvement and repair applications is anticip increase billion. A construc ver the for improve ance at a h supporti gs. Additi building a ade existi ties to attract or keep tenants, further benefitting demand for products. Increasing interest in water conservation, as well a governmental regulations regarding water use for fixtures an will aid replacement demand.

SAMPLE TEXT

In 2006, plumbing fittings accounted for about half of d slightly edging out the fixture segment. Through 2011, fitting 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.

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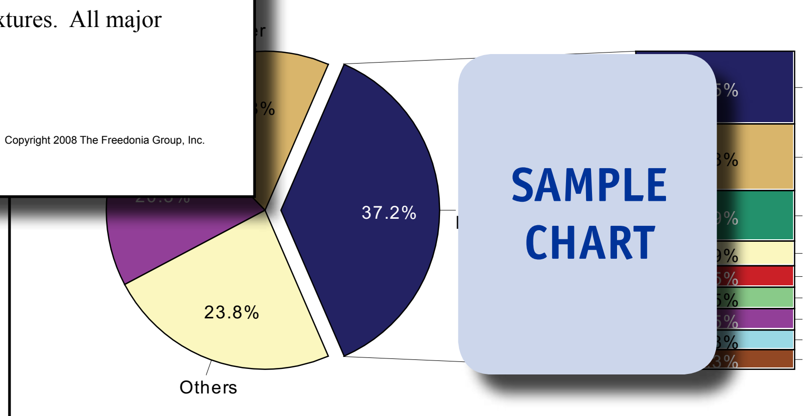
CHART IX-1

ING PRODUCT MARKET SHARE, 2006
($10 billion)



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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	2				.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

SAMPLE TABLE

COMPANY PROFILES

Briggs Plumbing Products Incorporated
300 Eagle Road
Goose Creek, SC 29445
843-569
http://w

Sales: $
Employ ... s Industriales SA)

Key Pro ... itchen sinks, bathtubs
and fauc

SAMPLE PROFILE

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 hospitality 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 manufacturing 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

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"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 residential market, improvement and repair markets 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. Bathtub 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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