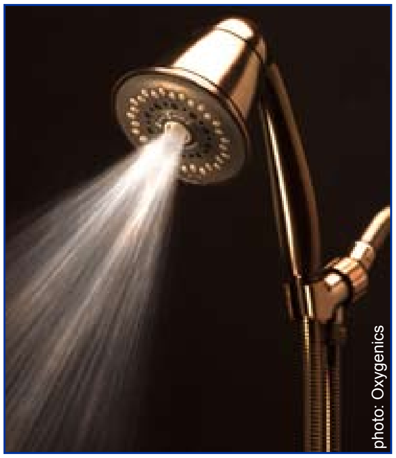

photo: Oxygenics

# Plumbing Fixtures & Fittings

US Industry Study with Forecasts for **2013 & 2018**

Study #2567 | October 2009 | $4900 | 391 pages

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## MARKETS



## REGIONS



## INDUSTRY STRUCTURE

# Plumbing Fixtures & Fittings

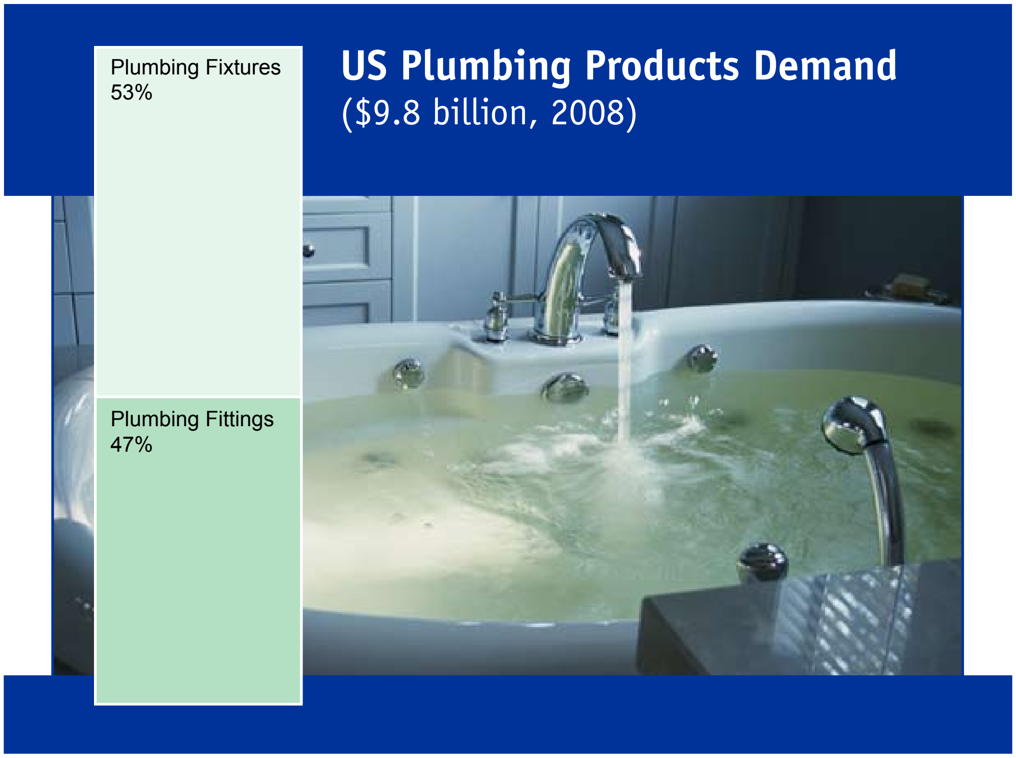
US Industry Study with Forecasts for ***2013 & 2018***



*Gains will be driven in part by continuing consumer interest in homes with more and larger bathrooms, and by increasing consumer desire for fixtures and fittings that reduce water use.*

## US demand to advance 1.9% yearly through 2013

Demand for plumbing fixtures and fittings in the US is expected to advance 1.9 percent annually through 2013 to $10.8 billion. Adjusted for price changes, demand will rise 1.4 percent per year, a rebound from the flat performance between 2003 and 2008. Gains will be driven by the rebounding US residential construction market as housing completions rise from the low levels experienced in 2008. Continuing consumer interest in homes with more and larger bathrooms will promote demand for fixtures and associated fittings. Further advances will be driven by increasing consumer desire for fixtures and fittings that reduce water use and utility bills.




**US Plumbing Products Demand**
($9.8 billion, 2008)

## Plumbing fixtures demand to outpace fittings

Demand for plumbing fixtures is forecast to advance 2.6 percent per year through 2013. Gains will be driven by rising consumer demand for such high-end products as whirlpool bathtubs and hot tubs and spas, which are perceived to add luxury and value to homes. Further advances in demand will be promoted by consumer desire for homes with multiple bathrooms. In the nonresidential market, gains will be restrained by weakness in construction expenditures, as building projects are scaled back or cancelled altogether. Demand for plumbing fittings is projected to rise 1.0 percent per year through 2013. The residential market will account for the majority of these gains as rebounding housing completions and consumer interest in bathroom renovation projects promote advances in demand. Gains will be derived from increasing interest in low-flow fittings that reduce water consumption and lower utility bills. Advances will also be promoted by demand for products that are easier for older Americans or the disabled to use. However, value gains will be checked by metal prices, which are forecast to decline through 2013.

## Dominant residential segment to lead market gains

Through 2013, the dominant residential market will post above-average gains, as housing completions advance and homeowners continue to upgrade their homes by adding to and increasing the number of their bathrooms, and expanding and modernizing their kitchens. Demand for plumbing fixtures and fittings in the nonresidential building construction market will decline slightly, reflecting reduced construction spending trends in office buildings, retail centers, hotels and other segments. However, building owners and property managers may opt to replace a large existing stock of older fixtures and fittings with more environmentally friendly models. In the transportation equipment market, rebounding production of recreational boats and vehicles will boost demand, as these craft are generally fitted with bathrooms.

# Plumbing Fixtures & Fittings

US Industry Study with Forecasts for ***2013 & 2018***

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## Sample Text, Table & Chart

**TABLE V-3**

**BATHTUB & SHOWER FIXTURES DEMAND BY PRODUCT (million dollars)**

| Item | 1998 | 2003 | 2008 | 2013 | 2018 |
|---|---|---|---|---|---|
| Residential Construction (bil 2000$) | | | | | |
| bath units/mil $ construction | | | | | |
| B&S Fixtures Demand (000 units) | | | | | |
| $/unit | | | | | |
| Bathtub & Shower Fixtures Demand | | | | | |
| Bathtubs | | | | | |
| Whirlpool Bathtubs | | | | | |
| Shower Stalls & Receptors | | | | | |
| Bathtub & Shower Surrounds | | | | | |
| - net imports | | | | | |
| B&S Fixtures Shipments | | | | | |

SAMPLE TABLE

**MARKETS**

**Manufactured Housing --** Demand for plumbing pr... m... 4 percent per ... $... by rising ship... m... ow-cost alter... o... promoted b... i... cale amenitie... lar...

SAMPLE TEXT

Manufactured housing will account for five percent of t... dential demand for plumbing products in 2013. The overall ... manufactured housing market is restrained by the smaller nu... manufactured homes built per year and placed on site in com... single-family units, which works to suppress both new and replacement demand. New construction applications will lead gains through 2013, as shipments rebound from a decade of declines. Improvement and repair growth will advance at a below-average pace, as most owners of manufactured homes do not have the means to engage in large-scale kitchen and bathroom renovations, and instead opt for smaller projects, such as the replacement of older fittings with newer, more environmentally friendly models.

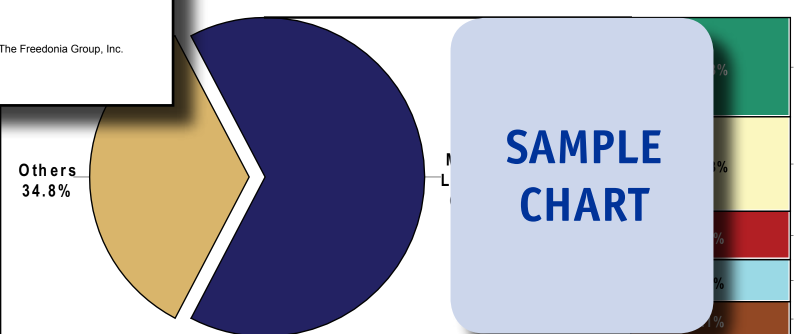
Through 2013, demand for fixtures is projected to advance at a more rapid pace than that of fittings. Gains in fixture demand will be promoted by the efforts of manufacturers to use more aesthetically pleasing -- and costly -- products in manufactured housing to enhance its marketability. Advances will also be spurred by homeowners looking to improve the appearance of their homes by adding more decorative fixtures, such as sinks and shower surrounds. Further advances will be derived from rising use of low-flow fittings to reduce utility bills and conserve water resources. Fittings demand gains will be checked by the projected decline in metal prices through 2013.

225



**CHART IX-1**

**...UMBING PRODUCTS MARKET SHARE, 2008 ($9.8 billion)**




SAMPLE CHART

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# Plumbing Fixtures & Fittings

US Industry Study with Forecasts for ***2013 & 2018***

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## Sample Profile, Table & Forecast

**TABLE VI-4**

**KITCHEN & OTHER SINK FITTINGS DEMAND BY PRODUCT (million dollars)**

| Item | 1998 | 2003 | 2008 | 2013 | 2018 |
|---|---|---|---|---|---|
| Building Construction (bil $) | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Kitchen & Other Sink Fixture Demand | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| $ fittings/000$ construction | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| $ kitchen & other/$ fixtures | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Kitchen & Other Sink Fittings Demand | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Single Lever Controls | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Deck Faucets: | | | | | |
| Exposed Mount | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Concealed Mount | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Miscellaneous Sink Fittings: | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Wallmount Faucets | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Single Sink Faucets | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Other Sink Fittings | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| - net imports | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| Kitchen & Other Sink Fittings Shpts | 521 | [illegible] | [illegible] | [illegible] | 640 |

**SAMPLE TABLE**

### COMPANY PROFILES

**Fluidmaster Incorporated**
30800 Rancho Viejo Road
San Juan Capistrano, CA 92675
949-728-2000
http://www.fluidmaster.com

Annual S...
Employ...

Key Pro... ...ppers, tank balls, flush val...

**SAMPLE PROFILE**

Flui... ...ducers of plumbing products... ...ted products, including flappe... ...mpany also produces specialty replacement plumbing fittings, such as faucet handles, access panels and other plumbing accessories. Fluidmaster has a 180,000-square-foot headquarters, engineering and manufacturing site in San Juan Capistrano, California, and a distribution facility in Nashville, Tennessee.

The Company is involved in the US plumbing products industry through the production and sale of toilet repair products, including flappers, tank balls, flush valves and tank levers. Flappers from Fluidmaster comprise BULL'S EYE standard types, which are designed to fit most tanks; BULL'S EYE SUPER models, which are chlorine-resistant; BULL'S EYE ADJUST-A-FLUSH varieties with dials to adjust water volume; and SURE-FIT SUPER chlorine-resistant types designed to fit most toilets. The Company's tank balls, which are chlorine-resistant, are tapered to fit virtually all conventional flush valves.

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"Demand for single-lever controls for kitchen and other sinks is forecast to increase 2.4 percent per year to $525 million in 2013. Advances will be led by the residential market, as rising housing completions and continued consumer interest in kitchen renovation projects will promote gains. Further demand advances will be driven by increasing ..."

--Section VI, pg. 189

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## Other Studies

### Decorative Tile

This study analyzes the US decorative tile industry. It presents historical demand data for the years 1998, 2003 and 2008 and forecasts for 2013 and 2018 by decorative tile material (ceramic, porcelain, glass), application (e.g., flooring, wall coverings, countertops) and market (e.g., residential, nonresidential). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

*#2580 .................. 12/2009..................... $4800*

### Countertops

US demand for countertops is forecast to rise 2.4% yearly through 2013. Products made from engineered and natural stone will grow the fastest while laminates remain the largest segment. The residential market will remain dominant based on a rebound in housing construction and continued consumer interest in high-value countertops. This study analyzes the 674 million square foot US countertop industry, with forecasts for 2013 and 2018 by material and market. It also evaluates market share and profiles industry players.

*#2552 .................. 09/2009..................... $4800*

### Plumbing in China

Demand for plumbing products in China will grow 9.9% annually through 2012. Ongoing trends toward multiple bathrooms and larger kitchens and further penetration of bathtubs and showers in Chinese homes will help fuel gains. The residential market will remain dominant while the nonresidential market will grow the fastest. This study analyzes the 75.6 billion yuan plumbing product industry, with forecasts for 2012 and 2017 by material, product, market and region. It also details market share and profiles industry players.

*#2410 .................. 11/2008..................... $5100*

### Consumer Water Purification & Air Cleaning Systems

US consumer water purification and air cleaning system demand will increase 4.4% annually through 2012. Reverse osmosis and distillation types will be the fastest growing water purification systems. Electrostatic air cleaners will outpace conventional air filtration systems. This study analyzes the $1.2 billion US purification and cleaning system industry, with forecasts for 2012 and 2017 by technology, product and regional market. It also evaluates market share and profiles industry players.

*#2419 .................. 10/2008..................... $4700*

### Builders' Hardware

US builders' hardware demand will rise to $11 billion in 2012, driven by a recovery in housing. Locks and other safety devices will remain the largest segment and grow the fastest, especially electromechanical types. Furniture will continue as the largest application while safety and protection products and cabinets lead gains. This study analyzes the US builders' hardware industry, with forecasts for 2012 and 2017 by material, product, application, market and region. It also evaluates market share and profiles industry players.

*#2379 .................. 09/2008..................... $4600*

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