



[CLICK TO VIEW](#)

[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](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

World Plumbing

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

Study #2599 | March 2010 | \$5800 | 373 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
Macroeconomic Outlook	7
Personal Income Trends	11
World Demographic Overview	13
Urban Population Outlook	15
Household Formation Patterns	17
World Fixed Investment	18
World Building Construction Outlook	20
Residential Building Outlook	22
Nonresidential Building Outlook	24
World Water Utilization Trends	26
Plumbing Product Demand & Economic Activity	33
Regulatory & Environmental Issues	35
Plumbing Codes	35
Water Conservation Regulations	36
Drinking Quality Issues	38

OVERVIEW

General	40
Plumbing Product Demand by Region	41
Plumbing Product Demand by Product	43
Fixtures by Region	45
Fixtures by Type	47
Bathtub & Shower Fixtures	49
Toilet Fixtures	49
Sink Fixture	49
Other Fixtures	50
Fixtures by Material	50
Fittings by Region	52
Fittings by Type	54
Plumbing Product Demand by Market	57
Plumbing Product Manufacturing by Region	59
International Trade in Plumbing Products	61

NORTH AMERICA

North America: Overview	63
Plumbing Product Demand by Market	64
Plumbing Product Supply & Demand	65
Plumbing Product Suppliers	68
United States	68
Canada	74
Mexico	79

WESTERN EUROPE

Western Europe: Overview	84
Plumbing Product Demand by Market	85
Plumbing Product Supply & Demand	87
Plumbing Product Suppliers	90

Germany	90
France	95
United Kingdom	100
Italy	105
Spain	110
The Netherlands	115
Other Western Europe	120

ASIA/PACIFIC

Asia/Pacific: Overview	129
Plumbing Product Demand by Market	131
Plumbing Product Supply & Demand	133
Plumbing Product Suppliers	135
China	135
Japan	141
India	147
South Korea	153
Australia	159
Indonesia	164
Thailand	169
Taiwan	174
Other Asia/Pacific	179

OTHER REGIONS

Latin America	188
Plumbing Product Demand by Market	189
Plumbing Product Supply & Demand	191
Plumbing Product Suppliers	194
Brazil	194
Argentina	199
Other Latin America	204
Eastern Europe	211
Plumbing Product Demand by Market	212
Plumbing Product Supply & Demand	213
Plumbing Product Suppliers	216
Russia	216
Poland	222
Other Eastern Europe	227
Africa/Mideast	234
Plumbing Product Demand by Market	235
Plumbing Product Supply & Demand	237
Plumbing Product Suppliers	239
Turkey	239
Iran	244
Other Africa/Mideast	249

INDUSTRY STRUCTURE

General	256
Industry Composition & Market Share	257
Market Leaders	261
Other Leading Companies	265
Manufacturing	266
Product Development	268
Marketing	271
Distribution	273
Mergers & Acquisitions	275
Cooperative Agreements	277

COMPANY PROFILES

American Standard Brands	281
Corporacion Empresarial Roca	286
Duravit AG	288
Duscholux AG	290
EID Parry India	291
Fabrica de Loza El Anfora	292
Fortune Brands	293
Globe Union Industrial	296
Grohe AG	300
Grupo Lamosa	302
Guangdong Huayi Plumbing Fittings	303
Hebei Anping Feilong Cast-Iron Porcelain Enamel	304
HSIL Limited	305
Ideal Standard International	306
Jacuzzi Brands	309
Jaquar & Company	312
Jomoo Group	313
Joyou Building Material Group	314
JS Group	315
Kohler Company	318
Lehua Ceramic Sanitary Ware	322
Masco Corporation	323
Rexnord LLC	328
Sanitec Corporation	330
Takara Standard	333
Tomkins plc	334
TOTO Limited	336
Villeroy & Boch	339
Other Companies Mentioned in Study	342

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Per Capita GDP by Region	13
3 World Population by Region	15
4 World Urban Population by Region	16
5 World Households by Region	18
6 World Fixed Capital Investment by Region	20
7 World Building Construction Expenditures by Region	22
8 World Residential Building Construction Expenditures by Region	24
9 World Nonresidential Building Construction Expenditures by Region	26
10 World Water Use by Region	28
Cht Percent of Population with Access to Improved Water Supplies, 2006	29
Cht Percent of Population with Access to Improved Sanitation Facilities, 2006	30

(continued on following page)

List of Tables/Charts

(continued from previous page)

Cht Disparity between Urban & Rural Access to Improved Water Supplies, 2006 31
 Cht Disparity between Urban & Rural Access to Improved Sanitation Facilities, 2006.... 32
 Cht Relationship between Per Capita Plumbing Product Demand & Per Capita Gross Domestic Product, 2008..... 34

OVERVIEW

1 World Plumbing Product Demand by Region 43
 2 World Plumbing Product Demand by Product 44
 3 World Plumbing Fixtures Demand by Region 47
 4 World Plumbing Fixtures Demand by Type. 48
 5 World Plumbing Fixtures Demand by Material..... 52
 6 World Fittings Demand by Region..... 54
 7 World Fittings Demand by Type..... 55
 8 World Plumbing Product Demand by Market 59
 9 World Plumbing Product Manufacturing by Region 60
 10 World Plumbing Product Trade Flows..... 62

NORTH AMERICA

1 North America: Plumbing Product Demand by Market 65
 2 North America: Plumbing Product Supply & Demand..... 67
 3 United States: Plumbing Product Demand by Market 71
 4 United States: Plumbing Product Supply & Demand..... 73
 5 Canada: Plumbing Product Demand by Market 76
 6 Canada: Plumbing Product Supply & Demand..... 78
 7 Mexico: Plumbing Product Demand by Market 81
 8 Mexico: Plumbing Product Supply & Demand..... 83

WESTERN EUROPE

1 Western Europe: Plumbing Product Demand by Market 87
 2 Western Europe: Plumbing Product Supply & Demand..... 89
 3 Germany: Plumbing Product Demand by Market 92
 4 Germany: Plumbing Product Supply & Demand..... 94
 5 France: Plumbing Product Demand by Market 97

6 France: Plumbing Product Supply & Demand..... 99
 7 United Kingdom: Plumbing Product Demand by Market 102
 8 United Kingdom: Plumbing Product Supply & Demand..... 104
 9 Italy: Plumbing Product Demand by Type 107
 10 Italy: Plumbing Product Supply & Demand..... 109
 11 Spain: Plumbing Product Demand by Market 112
 12 Spain: Plumbing Product Supply & Demand..... 114
 13 Netherlands: Plumbing Product Demand by Market 117
 14 Netherlands: Plumbing Product Supply & Demand..... 119
 15 Other Western Europe: Plumbing Product Demand by Market & Country 122
 16 Other Western Europe: Plumbing Product Supply & Demand..... 127

ASIA/PACIFIC

1 Asia/Pacific: Plumbing Product Demand by Market 132
 2 Asia/Pacific: Plumbing Product Supply & Demand..... 134
 3 China: Plumbing Product Demand by Market 138
 4 China: Plumbing Product Supply & Demand..... 140
 5 Japan: Plumbing Product Demand by Market 144
 6 Japan: Plumbing Product Supply & Demand..... 146
 7 India: Plumbing Product Demand by Market 150
 8 India: Plumbing Product Supply & Demand..... 152
 9 South Korea: Plumbing Product Demand by Market 156
 10 South Korea: Plumbing Product Supply & Demand..... 158
 11 Australia: Plumbing Product Demand by Market 161
 12 Australia: Plumbing Product Supply & Demand..... 163
 13 Indonesia: Plumbing Product Demand by Market 166
 14 Indonesia: Plumbing Product Supply & Demand..... 168
 15 Thailand: Plumbing Product Demand by Market 171
 16 Thailand: Plumbing Product Supply & Demand..... 173
 17 Taiwan: Plumbing Product Demand by Market 176
 18 Taiwan: Plumbing Product Demand by Market 178

19 Other Asia/Pacific: Plumbing Product Demand by Market & Country 182
 20 Other Asia/Pacific: Plumbing Product Supply & Demand..... 186

OTHER REGIONS

1 Latin America: Plumbing Product Demand by Market 191
 2 Latin America: Plumbing Product Supply & Demand..... 193
 3 Brazil: Plumbing Product Demand by Market 196
 4 Brazil: Plumbing Product Supply & Demand..... 198
 5 Argentina: Plumbing Product Demand by Market 201
 6 Argentina: Plumbing Product Supply & Demand..... 203
 7 Other Latin America: Plumbing Product Demand by Market & Country 207
 8 Other Latin America: Plumbing Product Supply & Demand..... 210
 9 Eastern Europe: Plumbing Product Demand by Market 213
 10 Eastern Europe: Plumbing Product Supply & Demand..... 215
 11 Russia: Plumbing Product Demand by Market 219
 12 Russia: Plumbing Product Supply & Demand..... 221
 13 Poland: Plumbing Product Demand by Market 224
 14 Poland: Plumbing Product Supply & Demand..... 226
 15 Other Eastern Europe: Plumbing Product Demand by Market & Country 229
 16 Other Eastern Europe: Plumbing Product Supply & Demand..... 233
 17 Africa/Mideast: Plumbing Product Demand by Market 236
 18 Africa/Mideast: Plumbing Product Supply & Demand..... 238
 19 Turkey: Plumbing Product Demand by Market 241
 20 Turkey: Plumbing Product Supply & Demand..... 243
 21 Iran Plumbing Product Demand by Market 246
 22 Iran Plumbing Product Supply & Demand 248
 23 Other Africa/Mideast: Plumbing Product Demand by Market & Country 251
 24 Other Africa/Mideast: Plumbing Product Supply & Demand..... 254

INDUSTRY STRUCTURE

1 Plumbing Product Sales by Company, 2008..... 260
 Cht Plumbing Product Market Share, 2008.... 261
 2 Selected Acquisitions & Divestitures..... 276
 3 Selected Cooperative Agreements..... 279

[Click here to purchase online](#)

While decelerating from the 2003-2008 pace, advances will still be quite healthy, as worldwide building construction spending and economic activity rebound from several years of slow growth.

Global demand to increase 3.5% yearly through 2013

Global demand for plumbing fixtures and fittings is forecast to increase 3.5 percent per annum through 2013 to \$65.7 billion. While decelerating from the 2003-2008 pace, advances will still be quite healthy, as worldwide building construction spending and economic activity rebound from several years of slow growth caused by the global financial crisis. Moreover, a substantial part of the growth recorded between 2003 and 2008 can be attributed to the appreciation of many world currencies relative to the US dollar; in unit terms, plumbing product demand gains during this period were significantly smaller.

Asia/Pacific region to see most rapid gains

The Asia/Pacific region will see the most rapid gains in plumbing product demand through 2013, as residential and nonresidential building construction increases. Initiatives to expand water and sanitation networks throughout the region will further aid demand for plumbing products. China alone will account for over half of all new worldwide demand generated between 2008 and 2013. Other Asian countries, including India, Indonesia and Vietnam, are also expected to post large gains.

Growth in developed countries, such as the US, Canada, Japan, Western Europe and Australia, will not be as strong as that in most industrializing regions. As

World Plumbing Product Demand (\$65.7 billion, 2013)

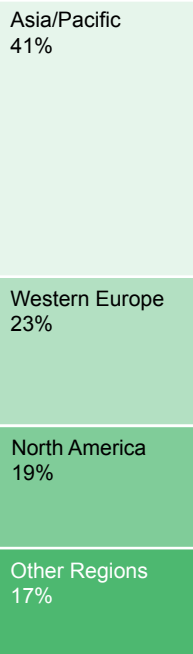


photo: Oxygenics

the economies of these countries recover from the global financial crisis, building construction will generally grow at a much slower pace than during the 2003-2008 period, limiting demand for plumbing fixtures and fittings. In the US, however, building construction expenditure growth will accelerate through 2013 because the country experienced the effects of the financial crisis at a much earlier date. Nearly all spending gains for plumbing products will be concentrated in the residential building market.

Residential market to outpace nonresidential

The residential market for plumbing products is projected to grow faster than

the nonresidential market between 2008 and 2013. In industrializing regions, positive demographic trends and increased demand for urban housing will stimulate new residential construction activity. As disposable incomes in these areas rise, households will spend more on improvement and repair, including replacing outdated fixtures and fittings. Among developed countries, the US will make the largest contribution to residential market growth. Following a period of sizable declines, both new residential construction activity and related plumbing product demand are expected to increase rapidly (from a low 2008 base).

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

China: Plumbing Product Demand by Market

Through 2013, Chinese demand for plumbing products to increase to \$7 billion, the world's fastest rate of growth. China's population growth is expected to increase at a pace, China's population will be driven by rapid growth between 2008 and 2013. All of all new global construction will be driven by rapid growth. Government and building to expand plumbing networks, particularly in rural areas, will stimulate plumbing fixtures and market.

SAMPLE TEXT

Demand for plumbing products associated with residential construction in China is forecast to rise 8.5 percent yearly through 2013. The improvement and repair segment will record the faster growth between 2008 and 2013. As per capita income in China rises, households will spend more on the renovation of existing residences, boosting sales of plumbing fixtures and fittings for improvement and repair applications. Although the new construction segment is expected to record slower growth, it will still post impressive gains. Positive demographic trends and increased demand for urban housing will continue to stimulate new residential building construction activity and related demand for plumbing products in China.

The nonresidential plumbing products market in China is expected to expand 10.5 percent per annum through 2013 to \$55.4 billion, recording gains in the residential market. Rapid economic growth and additional inflows of foreign investment will cause nonresidential construction spending to increase 8.0 percent per year through 2013. The nonresidential improvement and repair segment is expected to record faster growth through 2013 than its new construction counterpart. Older buildings in China will be upgraded and modernized.

137

TABLE VI-3

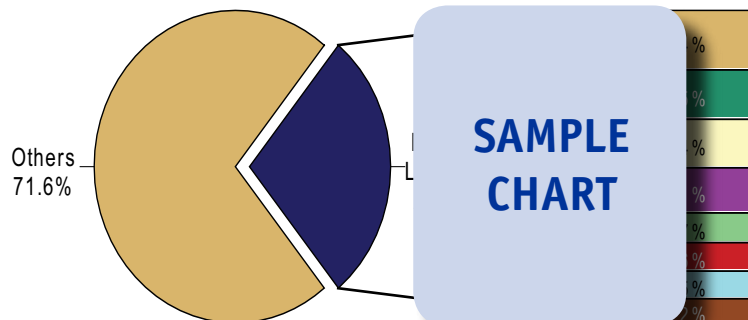
CHINA: PLUMBING PRODUCT DEMAND BY MARKET
 (million dollars)

Item	1998	2003	2008	2013	2018
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2007\$)					
\$ plumbing product/capita					
\$ plumbing product/mil \$ GDP					
Plumbing Product Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential:					
New					
Improvement & Repair					

SAMPLE TABLE

CHART VIII-1

PLUMBING PRODUCT MARKET SHARE, 2008
 (\$55.4 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Grupo Lamosa SAB de CV

Ave. Pedro Ramirez Vasquez Number 200-7
 Colonel Del Valle, Sector Oriente 66269
 San Pedro Garza Garcia, Nuevo Leon
 Mexico
 52-81-80
 http://www

Sales: \$
 Employ

Key Pro and drinking fountains

Grupo Lamosa manufactures products for wall and floor coverings, bathroom fixtures, and adhesives for ceramic tiles. The Company is also involved in the development of residential and commercial real estate. Grupo Lamosa operates through four segments: Ceramic Tiles, Adhesives, Sanitaryware and Real Estate.

The Company participates in the world plumbing products industry through the Sanitaryware segment, which had 2008 sales of \$72 million. Of the segment's total sales, the Mexican market accounted for 61 percent and other markets represented 39 percent. The Sanitaryware segment, which does business as Sanitarios Lamosa SA de CV, manufactures such vitreous china plumbing fixtures as toilets, bidets, lavatories, urinals and drinking fountains for residential and commercial applications. These products are sold under the LAMOSA, VORTENS and AMBIANCE brand name. For example, the company's toilets incorporate the DUAL FLUSH system, which has a handle that allows the user to choose between 3 or 6 liter flushing volumes.

302

Copyright 2010 The Freedonia Group, Inc.

**SAMPLE
PROFILE**

TABLE VI-4

CHINA: PLUMBING PRODUCT SUPPLY & DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Building Constr Expend (bil 2007\$)	2	2	2	2	2
\$ plumbing product/000\$ constructio					4
Plumbing Product Demand					00
Fixtures:					00
Bathtubs & Showers					50
Toilets					10
Sinks					30
Other Fixtures					00
Fittings:					00
Lavatory					40
Kitchen & Other Sink					50
Other Fittings					00
Bathtub & Shower					00
net exports					50
Plumbing Product Manufacturing	2	2	2	2	50

**SAMPLE
TABLE**

"Shipments of plumbing fixtures and fittings from factories in China are forecast to grow 8.4 percent per annum through 2013 to \$20.9 billion, ensuring that the country remains the world's leading producer and exporter of these products. Manufacturers operating in China will increase output primarily because of advances in domestic and regional product demand. However, Chinese companies will also benefit from inflows of foreign investment and additional export opportunities ..."
 --Section VI, pg. 139

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

[Click here to learn more about the Corporate Use License](#)

ORDER FORM

F-WEB.2599

World Plumbing \$5800

Corporate Use License (add to study price) * + \$2600

Additional Print Copies @ \$600 each *
Total (including selected option) \$_____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Credit Card #

MM		YY	

Expiration

Signature _____

Name _____

Title _____

Company _____

Division _____

Street _____
(No PO Box please)

City/State/Zip _____

Country _____

Phone _____ Fax _____

Email _____

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature _____

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature _____

OTHER STUDIES

Plastic & Competitive Pipe

This study analyzes the US pipe industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by market (e.g., potable water; conduit; natural gas and oil; drainage and sewer; drain, waste and vent; irrigation; process), material (e.g., concrete, steel, plastic, ductile iron, copper, aluminum) and plastic resin (e.g., PVC, HDPE, reinforced thermoset, ABS). The study also considers market environment factors, evaluates company market share and profiles industry participants.

#2738 February 2011 \$5100

World Solid Surface & Other Cast Polymers

Global demand for cast polymers is projected to increase 8.7% annually through 2014. About 60% of the gains will be from China, with its quickly developing domestic cast polymer industry and considerable construction sector. Engineered quartz and marble will grow the fastest. This study analyzes the 169 million square meter world cast polymer industry, with forecasts for 2014 and 2019 by product, application, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2650 July 2010 \$5800

Water & Wastewater Pipe

Demand for water and wastewater pipe in the US is expected to rise 5.8% annually through 2014. Copper pipe will be the fastest growing product while plastic pipe remains dominant. Building construction will be the fastest growing market, with potable water applications leading gains. This study analyzes the \$14.8 billion US water and wastewater pipe industry, with forecasts for 2014 and 2019 by market, application and product. It also evaluates company market share and profiles industry players.

#2634 June 2010 \$4700

Plumbing Fixtures & Fittings

US plumbing product demand will reach \$10.8 billion in 2013, supported in part by consumer desire for homes with multiple bathrooms. Shipments will lag demand as imports expand rapidly. Fixtures will outpace fittings, led by high-end products such as whirlpool bathtubs and hot tubs and spas, which are perceived to add luxury and value to homes. This study analyzes the US plumbing products industry, with forecasts for 2013 and 2018 by material, type, market and region. It also evaluates market share and profiles industry players.

#2567 10/2009 \$4900

Residential Kitchen & Bath Countertops in China

Demand for countertops in China will grow 4.6% annually through 2012. Kitchen countertops will remain dominant while bathroom applications grow the fastest. Solid surface types will continue to gain market share on natural stone, tile and laminates. The small engineered stone segment will post the fastest growth. This study analyzes the 65.7 million square meter countertop industry in China, with forecasts for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry players.

#2450 02/2009 \$5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)