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# Plumbing Fixtures & Fittings

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US Industry Study with Forecasts for **2015 & 2020**

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Study #2798 | September 2011 | \$5100 | 418 pages

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*Gains will be spurred by a recovery in building construction expenditures from their low 2010 base, and by a rebound in the size and number of bathrooms per new housing unit.*

## US demand to rise 7.1% annually through 2011

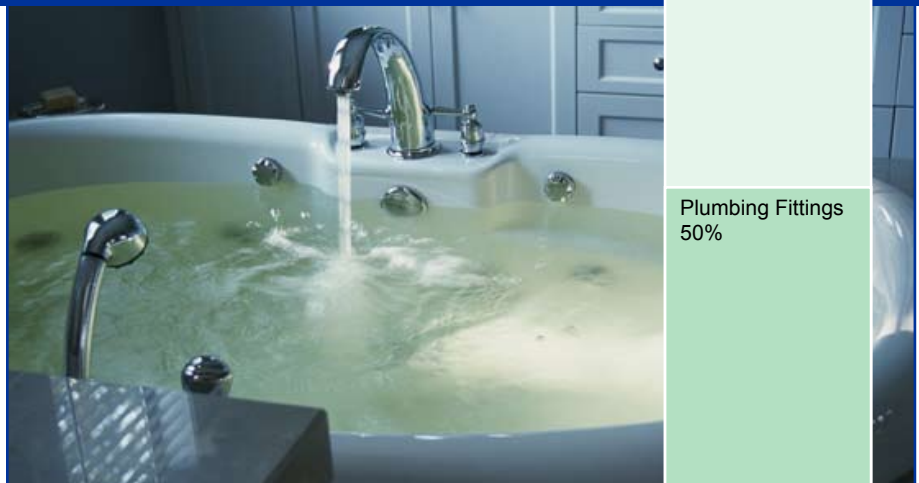
US demand for plumbing fixtures and fittings is forecast to rise 7.1 percent per year to \$10.9 billion in 2015, spurred by a recovery in building construction expenditures from their low 2010 base. Also boosting demand will be a rebound in the size and number of bathrooms per new housing unit to levels common in the middle of the last decade. During the 2007-2010 downturn in housing construction, many builders installed fewer and smaller bathrooms and used less costly fixtures and fittings in the new houses that were completed, further restraining plumbing product demand.

## New residential market to see fastest gains

The new residential market will see the fastest growth in plumbing fixtures and fittings demand, driven by the rise in housing completions. However, residential improvement and repair applications will remain the largest market for plumbing products through 2015. Rebounding improvement and repair spending will boost advances. Homeowners will renovate their kitchens and add to and increase the number of bathrooms in their homes, supporting demand for fixtures and fittings. Moreover, many homeowners will install high-end products to improve the aesthetics and increase the value of their homes.

In the nonresidential market, plumbing product demand will be driven by

## US Plumbing Product Demand (\$7.7 billion, 2010)



rebounding construction activity. Such structures as office buildings, retail sites, schools, lodgings and health care facilities feature intensive use of fixtures and fittings, so rising office and commercial, and institutional construction spending will boost advances. In other markets, growth in shipments of recreational boats and vehicles from their low 2010 levels will drive gains.

## Plumbing fixtures to outpace plumbing fittings

Plumbing fixtures demand is forecast to rise 8.7 percent annually through 2015. Advances will be spurred by rising unit demand, especially of such higher-priced products as hot tubs and spas, whirlpool

bathtubs, cast polymer lavatories, and large restaurant-style sinks.

Demand for plumbing fittings is projected to increase 5.3 percent per year through 2015. Growth in value demand for plumbing fittings will be checked as an increasing share of supply comes from low-priced imports. Moreover, metal prices are expected to rise at a more modest pace through 2015, suppressing advances. On the other hand, rebounding building construction expenditures will boost gains, as will increasing consumer interest in low-flow fittings that reduce water use and lower utility bills. These fittings are more costly than standard products, but can offer long-term savings.

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## Sample Text, Table & Chart

### FIXTURES BY MATERIAL

#### Supply & Demand

Plumbing fixtures demand is projected to advance year to year. This is a turnaround between 2005 and 2009, when demand fell as residential construction was erected, the residential market, many fewer homes, a reversal with more and larger negatively affected fixtures demand in both unit and volume only were fewer bathroom fixtures needed to equip a home. fixtures that were installed were often cheaper products, such as low-cost imports.

Going forward, demand will be driven by the forecast rebound in building construction expenditures. In the residential market, rising housing completions will boost plumbing fixtures demand. Style trends dictating larger and multiple bathrooms and professional-style kitchens will promote growth. Builders will install these features in new homes, while homeowners will renovate to add these amenities. Bathrooms will include larger showers and bathtubs, multiple sinks and toilets, and other plumbing fixtures. Kitchens will feature multiple sinks to facilitate food preparation.

Plumbing fixtures demand in nonresidential building construction applications will be spurred by the rebound in office and commercial institutional construction spending, the two markets that feature intensive use of fixtures. In the office and commercial market, digit increases in office, commercial and lodging construction will boost growth for lavatories and toilet fixtures. Steady growth and health care construction expenditures growth will drive demand for bath and shower, toilet and lavatory fixtures in the institutional

77

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**TABLE V-3**  
**BATHTUB & SHOWER FIXTURES DEMAND BY PRODUCT**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Residential Bldg Construction (bil 2005 bath units/mil \$ construction					
Bathtub & Shower Fixtures (000 units) \$/unit					
Bathtub & Shower Fixtures Demand					
Bathtubs					
Whirlpool Bathtubs					
Shower Stalls & Receptors					
Bathtub & Shower Surrounds					
- net imports					
Bathtub & Shower Fixtures Shipments					

**SAMPLE TEXT**

**SAMPLE TABLE**

**CHART IX-1**

**PLUMBING PRODUCTS MARKET SHARE**  
 (\$7.7 billion, 2010)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### MAAX Bath Incorporated

160 Boulevard St.-Joseph  
 Lachine, Quebec H8S 2L3  
 Canada  
 514-844-4155  
<http://www.maax.com>

Annual Sales:  
 Employment:

Key Products: shower doors, shower  
 bases, walls, sinks

MAAX Bath manufactures a variety of bathroom fixtures, including standard and whirlpool bathtubs; shower doors; and acrylic, fiberglass and acrylonitrile-butadiene-styrene thermoplastic showers. The Company is owned by Tricap Partners Limited (Canada), a private equity fund managed by Brookfield Asset Management Incorporated (Canada). Tricap also operates MAAX Spas Industries Corporation, a sister company that produces spas. (See MAAX Spas Industries Corp.)

The Company is involved in the US plumbing product industry through the manufacture and sale of bathtubs, bath/shower combinations, showers, shower bases, walls, shower doors, sinks and accessories. MAAX Bath Incorporated markets products through five brands: MAAX COLLECTION, MAAX PROFESSIONAL, KEYSTONE BY MAAX, AKER BY MAAX and ADVANTA BY MAAX. As of early 2011, the Company operated nine manufacturing and distribution facilities in North America.

The MAAX COLLECTION brand encompasses high-quality bathroom products including bathtubs, bathtub/showers, showers, walls and

**SAMPLE  
PROFILE**

TABLE VI-4

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

Item	2000	2005	2010	2015	2020
Building Construction Expenditures (billions)	17	17	17	17	17
Kitchen & Other Sink Fittings Demand	0	0	0	0	0
\$ fittings/000\$ construction	8	8	8	8	8
\$ fittings/\$ fixtures	8	8	8	8	8
Kitchen & Other Sink Fittings Demand	0	0	0	0	0
Single-Lever Controls	0	0	0	0	0
Deck Faucets:	0	0	0	0	0
Exposed Mount	5	5	5	5	5
Concealed Mount	5	5	5	5	5
Miscellaneous Sink Fittings:	0	0	0	0	0
Wallmount Faucets	0	0	0	0	0
Single-Sink Faucets	0	0	0	0	0
Other Sink Fittings	0	0	0	0	0
- net imports	5	5	5	5	5
Kitchen/Other Sink Fittings Shipments	5	5	5	5	5

**SAMPLE  
TABLE**

"Demand for plumbing products in the residential market is anticipated to increase 7.5 percent annually to \$6.7 billion in 2015. Advances will be driven by the rebound in housing completions. Not only will more homes be constructed, but builders will include more and larger bathrooms that require more fixtures and fittings for completion. Many homeowners desire bathrooms with multiple lavatories, or more costly products, such as whirlpool bathtubs or larger showers."  
 --Section VII, pg. 213



**OTHER STUDIES**

**Countertops**

US demand for countertops is forecast to advance 4.8 percent annually through 2015. Gains in the key residential market will be promoted by a rebound in housing completions and by increasing repair and improvement spending. Furthermore, growing interest in making homes more marketable will benefit higher-value countertop materials. This study analyzes the 600 million square foot US countertop industry, with forecasts for 2015 and 2020 by material and market. The study also evaluates company market share and profiles industry players.

#2788 ..... September 2011..... \$5100

**World Plastic Pipe**

World plastic pipe demand is forecast to increase 7.3 percent annually through 2015. More than two-thirds of all gains will be attributable to the Asia/Pacific region, although the North American market will grow at the same pace as plastic pipe sales in the US recover rapidly. HDPE and smaller-volume plastic pipe will outpace PVC. This study analyzes the 15.8 million metric ton world plastic pipe industry, with forecasts for 2015 and 2020 by resin, world region and for 39 countries. The study also evaluates company market share and profiles industry participants.

#2748 ..... May 2011..... \$6100

**Plastic & Competitive Pipe**

US demand for pipe is forecast to advance 6.6 percent annually through 2015. Gains will be driven in part by a rebound in construction activity and an improved outlook for state and municipal infrastructure spending. PVC and other plastic pipe will be the fastest-growing pipe material, while steel pipe will remain the leading material. This study analyzes the \$28.1 billion US pipe industry, with forecasts for 2015 and 2020 by market, material and plastic resin. It also evaluates company market share and profiles industry participants.

#2738 ..... February 2011..... \$5100

**World Plumbing**

Global plumbing product demand will rise 3.5 percent yearly through 2013. The Asia/Pacific region will see the fastest gains, while growth in developed countries will not be as strong. The fixtures segment will grow at a somewhat faster pace than fittings, based on demand for more sophisticated fixtures. This study analyzes the \$55.4 billion world plumbing product industry, with forecasts for 2013 and 2018 by product, material, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2599 ..... March 2010..... \$5800

**World Residential Countertops**

Global home countertop demand will rise 3.3 percent yearly through 2013. The Asia/Pacific region will remain the largest market, led by gains in China and India. Laminate, solid surface and natural stone will remain key material types, while engineered stone will grow the fastest. This study analyzes the 289 million square meter world residential countertop industry, with forecasts for 2013 and 2018 by material, type, market, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2585 ..... January 2010 ..... \$5800

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