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# World Plumbing

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Industry Study with Forecasts for **2016 & 2021**

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Study #2934 | September 2012 | \$6100 | 364 pages

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*Growth in world plumbing demand will be driven by rising per capita incomes in industrializing countries and by an expected recovery in construction spending in developed countries.*

## World demand to rise 6.2% annually through 2016

Global demand for plumbing fixtures and fittings is forecast to increase 6.2 percent per year through 2016 to \$80 billion, an acceleration from the pace of the 2006-2011 period. This increase is expected to be driven by two main factors. In industrializing countries of the Asia/Pacific and Africa/Mideast regions, rising per capita incomes will be the primary driver of demand. In developed countries, including the US, Canada, and those in Western Europe, an expected recovery in construction spending will generate demand.

## Asia/Pacific region to show most rapid growth

The Asia/Pacific region will see the most rapid growth in demand, primarily fueled by China's increasing, albeit decelerating, rate of industrialization. China alone is forecast to account for one-half of the increase in global plumbing demand generated between 2011 and 2016. The country's vast population makes infrastructure and sewage system development a necessity, supporting demand by households that previously did not have a piped water supply. Other industrializing countries in Asia, such as India and Indonesia, and in the Africa/Mideast region will also contribute to overall plumbing product demand.

North America is forecast to post the second fastest regional growth in

## World Plumbing Product Demand (\$79.6 billion, 2016)



China	35%
Other Asia/Pacific	16%
Western Europe	17%
North America	16%
Other Regions	16%

photo: All Season Spas

plumbing product demand through 2016, primarily fueled by the rebound in the US construction market after the downturn during the global financial crisis. Canada and Mexico are also expected to post healthy gains.

The slowest plumbing product demand growth is anticipated in Western Europe, primarily due to the region's mature building infrastructure and slow population growth, which combine to limit building construction activity. However, the pace is expected to accelerate from that between 2006 and 2011. While construction expenditures in this region are predicted to grow at the slowest rate globally, they will reflect a recovery from a low 2011 base.

## Plumbing fixtures to outpace demand for fittings

Demand for plumbing products in the residential market is anticipated to grow more quickly than demand in the non-residential market through 2016.

Increasing population levels and urbanization combined with rising per capita incomes in industrializing countries will fuel growth in housing demand and thus plumbing product demand. Demand for plumbing fixtures is predicted to grow at a faster rate than demand for fittings, driven by the expansion of water treatment infrastructures in developing countries. Additionally, rising personal incomes will allow consumers to afford more luxurious or water efficient fixtures.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Plumbing Product Supply & Demand

Plumbing fixtures demand in India is expected to grow by 7.0% in 2016. The fastest growth is expected in the toilet segments. Rapidly rising per capita incomes will fuel demand for water delivery and plumbing fixtures will be a key driver. Demand is predicted to increase by 6.5% in 2016. As the primary driver of growth is expected to be the kitchen and other fixtures, consumers will update their plumbing products from India are expected to grow from 2016 to \$2.6 billion. Domestic demand will benefit from advances in local demand and additional export opportunities in foreign markets. Strong competition from other developing countries, including others in the Asia/Pacific region, will limit growth. As such, India is expected to become a net importer of plumbing products by 2016, as domestic output expansion will lag demand growth.

Leading India-based plumbing products manufacturers include Choice Sanitaryware, EID Parry (Parryware), Hindustan Sanitaryware and Industries, Jaquar, Marc Sanitation, and Sanyo Ceramics. While few foreign companies operate manufacturing facilities in India (one exception), companies such as TOTO and Villeroy & Boch have sales facilities in the country. Additionally, several foreign manufacturers participate in joint ventures with Indian companies, such as Masco (Masco), whose products are marketed by Jaquar.

147

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TABLE VI-8

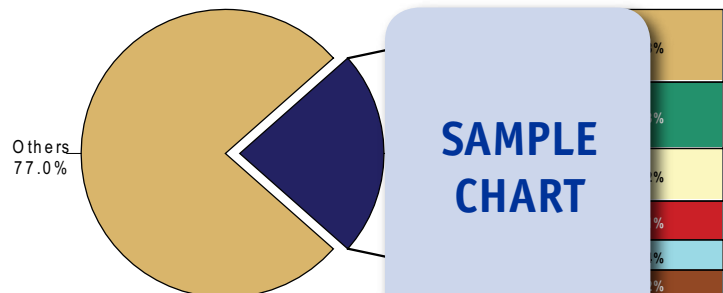
INDIA: PLUMBING PRODUCT SUPPLY & DEMAND  
(million dollars)

Item	2001	2006	2011	2016	2021
Bldg Construction Expend (bil 2010\$)	200	250	300	350	400
\$ plumbing product/000\$ constr	1.0	1.2	1.5	1.8	2.2
Plumbing Product Demand	200	250	300	350	400
Fixtures:					
Bathtubs & Showers	100	120	150	180	220
Toilets	50	60	75	90	110
Sinks	30	36	45	54	66
Other Fixtures	20	24	30	36	44
Fittings:					
Bathtub & Shower	10	12	15	18	22
Lavatory	5	6	7.5	9	11
Kitchen & Other Sink	10	12	15	18	22
Other Fittings	5	6	7.5	9	11
net exports	0	0	0	0	0
Plumbing Product Shipments	0	0	0	0	0

SAMPLE  
TABLE

CHART VIII-1

PLUMBING PRODUCT MARKET SHARE, 2011  
(\$58.8 billion)

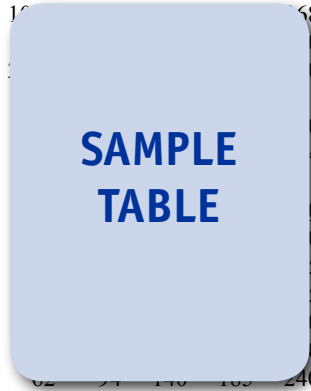


SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VI-7**  
**INDIA: PLUMBING PRODUCT DEMAND BY MARKET**  
 (million dollars)

Item	2001	2006	2011	2016	2021
Population (millions)	100	110	120	130	140
GDP/capita	100	110	120	130	140
Gross Domestic Product (bil 2010\$)	100	110	120	130	140
\$ plumbing product/capita	0.2	0.25	0.3	0.35	0.4
\$ plumbing product/mil \$ GDP	0.2	0.25	0.3	0.35	0.4
Plumbing Product Demand	20	25	30	35	40
Residential:					
New	10	12	14	16	18
Improvement & Repair	10	13	16	19	22
Nonresidential:					
New	10	12	14	16	18
Improvement & Repair	10	13	16	19	22



**COMPANY PROFILES**

**Duscholux AG**  
 CFL Lohnerstraße 30  
 3645 Gwatt-Thun  
 Switzerland  
 41-33-33-44-1  
 http://www.du

**SAMPLE PROFILE**

Annual Sales:  
 Employment:  
 Key Products: steam showers

Duscholux manufactures bathtubs, shower trays, shower enclosures, bathtub doors, and related accessories. The Company operates and maintains four production sites and has several sales organizations worldwide.

The Company's acrylic bathtubs include corner, oval, rectangular, diagonal, and whirlpool models. Duscholux's shower trays include rectangular, corner, round and pentagonal varieties. Among the rectangular shower trays are the FREEBASE ultra shallow models, which can be combined with almost all shower walls in flush mount configuration; and the ANCONA classic shower base with a depth of 50 millimeters. Its round shower trays comprise FREEBASE ultra-shallow models; and MALAGA half round models, which are designed for a corner shower configuration. The Company also makes the CORDOBA corner shower tray, which is designed with a super flat inner depth. Pentagonal shower trays are marketed under the PICCOLO brand name. Duscholux's shower enclosures include frameless, walk in, partially framed, and framed varieties. In addition, the Company makes shower doors for bathtub/shower combinations. The Company's steam showers, which are sold under the SPOT LIVE and CUBE brand names, feature side mounted shower massage jets, a hand shower, and steam nozzles.

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"Demand for plumbing products in India is projected to increase 8.8 percent per year through 2016 to \$2.7 billion, making it the third largest market in the region behind China and Japan. Rapid economic growth and increasing construction spending will spur demand growth. However, despite increasing efforts to expand the water delivery and sanitation networks, per capita usage of plumbing products is expected to remain lower than the regional average."  
 --Section VI, pg. 145

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**OTHER STUDIES**

**Large Diameter Pipe**

US large diameter pipe demand will rise 6.2 percent yearly through 2016 to 197 million feet. Storm and sanitary sewers will remain the leading market, while drainage and water transmission will grow the fastest. Concrete pipe will rebound from a depressed base to be the fastest growing material, while HDPE will surpass steel as the most common type. This study analyzes the 146 million foot US large diameter pipe industry, with forecasts for 2016 and 2021 by market and material. The study also evaluates company market share and profiles industry players.

#2974 .....December 2012 ..... \$5100

**Plastic & Competitive Pipe**

US demand for pipe is expected to grow 6.2 percent per year to \$50.1 billion in 2016. Plastic pipe will experience the fastest growth, led by PVC. Concrete and ductile iron pipe will lead gains among other material types. Steel pipe will remain the leading pipe material in value terms, based on its dominance in the oil and gas market. This study analyzes the \$37 billion US pipe industry, with forecasts for 2016 and 2021 by market, material and resin. The study evaluates company market share and profiles industry participants.

#2958 .....October 2012 ..... \$5300

**Residential Kitchen & Bath Countertops in China**

The market for residential kitchen and bathroom countertops in China is expected to grow 6.5 percent per year to 82.1 million square meters in 2015. Solid surface will remain the largest material segment while engineered stone will grow the fastest, increasing 20 percent per year. This study analyzes the 60 million square meter residential kitchen and bath countertop industry in China, with forecasts for 2015 and 2020 by surface material, application, market and region. The study also evaluates company market share and profiles industry participants.

#2890 .....July 2012 ..... \$5400

**Cabinets**

US demand for cabinets is forecast to rise 8.2 percent annually to \$15.3 billion in 2016, driven by a rebound in housing completions. The dominant kitchen cabinet segment will see the fastest growth. Demand will also be boosted by design trends that call for homes with more and larger cabinets to store food products and cookware. This study analyzes the \$10.3 billion US cabinet industry, with forecasts for 2016 and 2021 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#2904 .....June 2012 ..... \$5100

**Plumbing Fixtures & Fittings**

US demand for plumbing products will rise 7.1 percent annually through 2015, driven by a recovery in building construction and a rebound in the size and number of bathrooms per new housing unit. Fixtures will outpace fittings, spurred by rising unit demand for such higher-priced products as hot tubs and spas, whirlpool bathtubs and cast polymer lavatories. This study analyzes the \$7.7 billion US plumbing product industry, with forecasts for 2015 and 2020 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#2798 .....September 2011 ..... \$5100

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