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World Plumbing

Industry Study with Forecasts for **2018 & 2023**

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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

email: info@freedoniagroup.com

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In developing areas, gains in building construction spending and personal income levels will support growth. In developed areas, rebounds in building construction spending will drive demand.

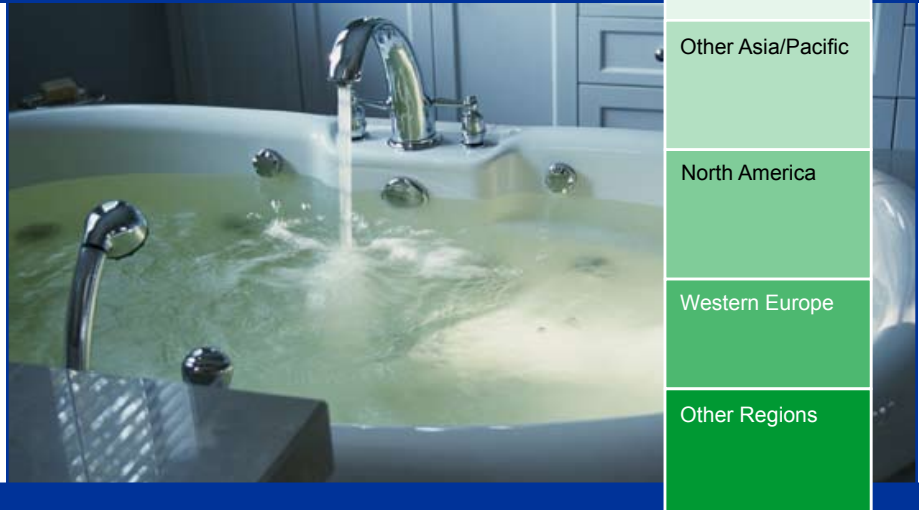
World demand to rise 5.3% annually through 2018

Through 2018, global demand for plumbing fixtures and fittings is projected to advance 5.3 percent annually to over \$70 billion, accelerating from the 2008-2013 pace. In lower income countries, including many in the Asia/Pacific and Africa/Mideast regions, continued strong increases in building construction spending and rising personal income levels will support growth. In a number of West European countries and the US, expected rebounds in building construction spending will drive demand for plumbing products.

Asia/Pacific region to be fastest growing

The Asia/Pacific region will post the fastest overall growth in plumbing products demand. Even with slowing demand, China alone will account for over one-third of the increase in global plumbing products demand generated between 2013 and 2018. China's vast population makes infrastructure and sewage system development a necessity, and therefore new homes are constantly being connected to water delivery systems. These systems are reaching previously unserved areas, thereby creating new customers and generating demand for plumbing products. Other industrializing countries in Asia, such as India and Indonesia, and in the Africa/Mideast region will also contribute to overall demand gains.

World Plumbing Products Demand (\$70.5 billion, 2018)



Residential construction market to grow the fastest

Demand for plumbing products in the residential construction market is expected to exceed that in the nonresidential market through 2018. The residential market will benefit from rebounding residential construction activity in many higher income countries, especially the US. Additionally, government efforts to expand water delivery and sewage systems in lower income countries will create new customers and spur demand. Rising personal income levels will allow consumers to replace plumbing products more frequently, also contributing to gains. In the nonresidential market, recovering nonresidential

construction spending in many developed countries will drive growth.

Both fixtures & fittings to expand at same rate

Demand for plumbing fixtures is projected to post gains in line with those for plumbing fittings through 2018. Expanding water treatment infrastructures in developing countries will spur demand for fixtures, and rising personal income levels will allow consumers to purchase more luxurious products. Plumbing fittings demand will also benefit from higher per capita incomes, as consumers will be able to replace fittings for aesthetic reasons prior to the end of their useful service lives.

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Sample Text, Table & Chart

ASIA/PACIFIC

Taiwan: Plumbing Products Supply & Demand

In Taiwan, plumbing products demand totaled US\$411 million in 2013, representing two percent of regional demand. Between 2008 and 2013, demand for plumbing fixtures and fittings in Taiwan grew at a rate of nearly two percent per year. Residential construction spending increased at a rate of nearly eight percent per year during this time, driving related plumbing products demand. However, overall growth was limited by a decline in nonresidential construction spending, which caused demand for new nonresidential construction applications.

Demand for plumbing products in Taiwan is forecast to increase at a rate of two percent per year through 2023, reaching US\$511 million, an improvement over the 2013 level. Residential construction spending is expected to increase at a rate of eight percent per year, driving plumbing products demand. Residential spending is expected to fall during the period 2014-2016, but is expected to rebound during 2017-2023. Residential improvement and repair spending is expected to increase at a rate of two percent per year, which will drive demand for plumbing products more often and to a greater extent than in the past.

Plumbing products factories in Taiwan totaled 168 in 2013, up from 167 in 2012. The total value of plumbing products exports from Taiwan in 2013 was US\$1.2 billion, up from US\$1.1 billion in 2012. The trade surplus in plumbing products from Taiwan in 2013 was US\$1.1 billion, up from US\$1.0 billion in 2012. The trade surplus in plumbing products from Taiwan is expected to widen going forward.

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SAMPLE
TEXT

TABLE V-3

GERMANY: PLUMBING PRODUCTS SUPPLY & DEMAND (million dollars)

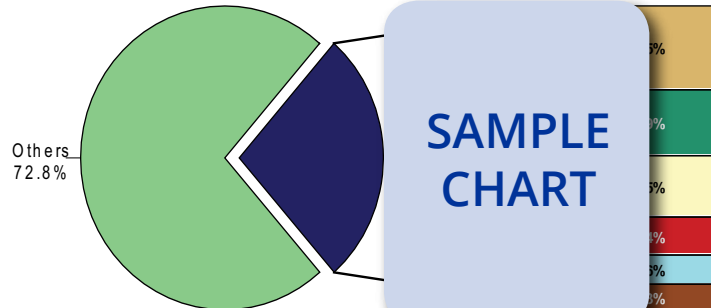
Item	2003	2008	2013	2018	2023
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2012\$)					
\$ plumbing product/capita					
\$ plumbing product/mil \$ GDP					
Plumbing Products Demand by Market					
Residential:					
New					
Improvement & Repair					
Nonresidential:					
New					
Improvement & Repair					
net exports					
Plumbing Products Shipments					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD PLUMBING PRODUCTS MARKET SHARE (\$54.4 billion, 2013)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VI-16
TAIWAN: PLUMBING PRODUCTS DEMAND BY PRODUCT
 (million US dollars)

Item	2003	2008	2013	2018	2023
Building Const Expend (bil 2012 US\$) \$ plumbing product/000\$ construction					
Plumbing Products Demand					
Fixtures:					
Bathtubs & Showers					
Toilets					
Sinks					
Other					
Fittings:					
Lavatory					
Lavatory					
Bathtub & Shower					
Kitchen & Other Sink					
Other					

Source: The Freedonia Group, Inc.

SAMPLE
PROFILE

SAMPLE
TABLE

STUDY
COVERAGE

World Plumbing is a Freedonia study that presents historical data (2003, 2008, 2013) plus forecasts (2018, 2023) for supply and demand, as well as demand by product, in 6 regions and 23 countries. The study also details key market environment factors, assesses the industry structure, analyzes company market share and profiles 31 competitors in the global plumbing industry.

COMPANY PROFILES

Duscholux AG
 CFL-Lohnerstraße 30
 3645 Thun
 Switzerland
 41-33-33
 http://www.duscholux.com

Annual Sales: \$100 million
 Employees: 100

Key Products: acrylic bathtubs, shower enclosures, and steam showers

Duscholux is a privately held producer of acrylic bathtubs, shower trays, shower enclosures, bathtub doors, and related accessories. The Company operates four production sites and has several sales organizations worldwide.

The Company's acrylic bathtubs include corner, polygon, rectangular, compact, and oval models. These products are sold via the PICCOLO, SMART-LINE, PRIME-LINE, MALAGA, CAPRIVI FREE, ANCONA, and PORTOFINO brands. For example, the PICCOLO line of whirlpool bathtubs feature asymmetrical shapes and are intended to fit in small bathrooms. Duscholux's shower trays include rectangular, round, corner, and pentagonal varieties. Among the Company's shower trays are the FREE BASE ultra shallow rectangular models, which can be combined with almost all shower walls in flush mount configuration. Other shower trays from Duscholux are sold under the ANCONA, FJORD, MALAGA, and CORDOBA brand names. The Company's shower enclosures include frameless, walk in, partially framed, and framed varieties that are sold under the BELLA VITA, COLLECTION, CLASSIC, AIR, URBAN, DESIGNA, MAGIC, CARAT, OPTIMA,

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RELATED STUDIES

World Countertops

Global demand for countertops is forecast to rise 4.2 percent per year to 503 million square meters in 2018. The Asia/Pacific region will remain the largest and fastest growing market. While the nonresidential market will post faster gains, the much larger residential segment will provide the most growth in demand. This study analyzes the 409 million square meter world countertop industry, with forecasts for 2018 and 2023 by material, market, application, product, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3250 February 2015 \$6300

World Cabinets

World cabinet demand will rise 5.5 percent annually to \$64 billion in 2018. The US will remain the largest market and will rebound from recent declines. The Asia/Pacific region will see robust growth, led by China and India. Kitchen cabinets will remain dominant while other types such as garage and office cabinets lead gains. This study analyzes the \$49 billion world cabinet industry, with forecasts for 2018 and 2023 by market, application, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3245 February 2015 \$6300

Construction Outlook in China

Construction expenditures in China are expected to increase 8.9 percent per annum in real terms through 2018. Nonresidential building construction will remain the largest sector and will grow the fastest, followed in pace by nonbuilding construction and residential building construction, respectively. This study analyzes the 15.9 trillion yuan construction industry in China, with forecasts for 2018 and 2023 by market, structure type, and geographic region. The study evaluates company market share and profiles industry participants.

#3221 January 2015 \$5300

World Housing

World construction of new housing will reach 61.3 million units in 2018 on 2.9 percent yearly advances. The Asia/Pacific region will own the most new housing units, while the Africa/Mideast housing stock region will grow the fastest. Multifamily housing construction will continue to outpace that of single-family types. This study analyzes the two billion unit world housing industry, with forecasts for 2018 and 2023 for housing stock and new housing units by type, world region, and for 22 countries. The study also considers economic trends, demographics and other market factors.

#3184 July 2014 \$5800

Plumbing Fixtures & Fittings

US demand for plumbing fixtures and fittings is projected to advance 6.3 percent per year through 2017 to \$12 billion. The residential market will account for over three-fifths of demand and will see the most rapid annual gains. Fixtures will outpace fittings based on design trends toward more and higher-end fixtures in kitchens and bathrooms. This study analyzes the \$8.8 billion US plumbing product industry, with forecasts for 2017 and 2022 by material, product, market and US region. The study also evaluates company market share and profiles industry players.

#3121 February 2014 \$5300

About The Freedonia Group

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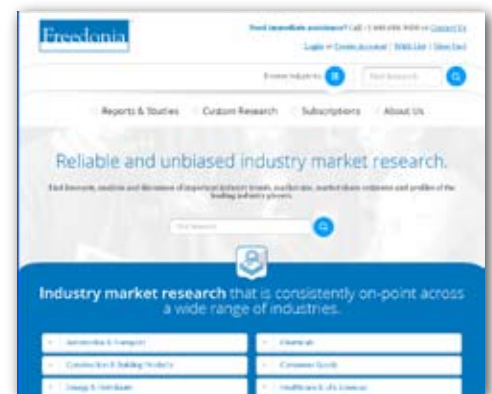
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