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# Plumbing Fixtures & Fittings

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Industry Study with Forecasts for 2019 & 2024

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Study #3346 | November 2015 | \$5500 | 445 pages

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*Growth for housing completions and design trends will buoy the residential market for plumbing products while greater construction of hotels, hospitals and offices will hike nonresidential gains for plumbing fixtures and fittings.*

## US demand to grow 6.3% per annum through 2019

US demand for plumbing fixtures and fittings is forecast to rise 6.3 percent per year to \$12.3 billion in 2019, spurred by rebounding building construction expenditures. The residential market will offer the most rapid gains, as strong growth in housing completions and design trends that call for homes with more and larger bathrooms and larger kitchens will boost demand for plumbing products. In the nonresidential market, greater construction of such buildings as hotels, offices, educational facilities and hospitals will promote demand for fixtures and fittings, as these structures generally have many bathrooms and kitchen facilities.

Demand for plumbing fixtures and fittings will also be boosted by strong consumer interest in bathroom renovation projects. Homeowners looking to enhance convenience -- especially older Americans looking to "age-in-place" -- will install additional bathrooms, many of which will have senior-friendly products such as walk-in bathtubs and showers with integrated seating, or fixtures such as touchless faucets and showerheads. Furthermore, owners and managers of such facilities as hotels, resorts, casinos, and other leisure-related businesses will renovate bathrooms to accommodate older Americans.

## Reducing water usage to spur growth in markets

In both the residential and nonresidential markets, concerns about reducing water consumption will spur home and business owners to replace older, less-efficient fixtures and fittings with newer

## US Plumbing Product Demand (\$12.3 billion, 2014)



Fixtures

Fittings

models that use less water. A prolonged period of drought in California and a rising awareness of water scarcity issues in many parts of the US will spur ecologically minded consumers to replace such products as toilet closet bowls and flush tanks, urinals, showerheads, faucets, and other fittings with low-flow products. Not only do newer fixtures and fittings use less water, they can lower utility bills.

## Fixtures to see faster gains than fittings through 2019

Plumbing fixtures -- which accounted for the larger share of plumbing products demand in 2014 -- will post faster gains in demand through 2019. In addition to the expected rebound in building construction activity, demand for plumbing fixtures will be supported by consumer

interest in higher-value products. Such items as commercial-size kitchen sinks, whirlpool baths, and walk-in bathtubs can enhance convenience, while such fixtures as acrylic bathtubs and cast polymer lavatories and kitchen sinks can be installed to improve aesthetics, which may impress visitors and guests and boost property values.

Increases in building construction activity will support demand for plumbing fittings, as will efforts of consumers to replace older and less-efficient faucets and showerheads with newer models that use less water. These low-flow products not only provide savings on water bills, but also offer such features as sensor-operated touchless controls to enhance convenience and improve hygiene, key considerations for owners and managers of hospitals, schools and other buildings.

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## Sample Text, Table & Chart

### FITTINGS

#### Bathtub & Shower Fittings

Bathtub and shower fittings demand totaled \$895 million in 2014. While an increase in demand from 2009, bathtub and shower demand in 2014 was still below that of 2004. Demand for this market was restrained by a decline in the use of bathtubs. In the residential market, multifamily units -- primarily apartments -- accounted for a large share of housing completions. Due to their small size, many were not outfitted with bathtubs, having only showers, which are easier to install. Moreover, as part of wider renovation programs, building owners and managers installed showers in their properties.

Bathtub and shower fittings demand is expected to increase to \$1.2 billion in 2019, spurred by rising expenditures and design trends that encourage residences to have more and larger bathrooms. In the new housing segment, strong growth in single-family housing completions, along with advances, as many of these newly erected houses will have full bathrooms. These bathrooms will have showers, if not bathtubs, and thus require fittings for those fixtures. In the residential improvement and repair segment, continuing homeowner interest in remodeling existing bathrooms or adding new ones will fuel gains. Not only will more bathrooms be built, but many homeowners -- such as those looking to age-in-place -- will specify senior-friendly fittings, such as personal showers, touchless taps, and showerheads that can provide hydrotherapeutic benefits. These fittings are sold at higher price points than standard models, supporting value advances.

In the nonresidential market, demand for bathtub and shower fittings will be boosted by increasing institutional construction. Such facilities as hotels, college dormitories, hospitals, and nursing homes have many full bathrooms. These units often have showers

204

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**TABLE IV-3**  
**PLASTIC PLUMBING FIXTURES DEMAND**  
**BY MATERIAL & PRODUCT**  
**(thousand units)**

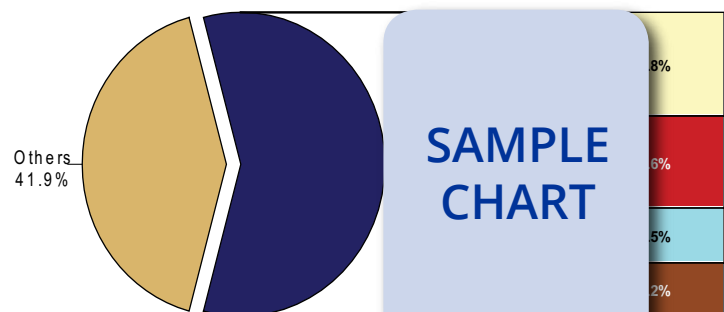
Item	2004	2009	2014	2019	2024
Plumbing Fixtures Demand % plastic	47	47	47	47	47
Plastic Plumbing Fixtures Demand					
By Material:					
Cast Polymer					
Fiberglass					
Acrylic					
Other					
By Product:					
Bathtub & Shower Fixtures					
Lavatories					
Kitchen & Other Sink Fixtures					
All Other					
\$/unit					
Plastic Plumbing Fixtures Demand (mil \$)					
- net imports					
Plastic Plumbing Fixtures Shpts (mil \$)	2,100	2,120	2,120	2,120	2,100

Source: The Freedonia Group, Inc.

**SAMPLE  
TABLE**

**CHART IX-1**

**PLUMBING PRODUCTS MARKET SHARE, 2014**  
**(\$9.1 billion)**



**SAMPLE  
CHART**

## Sample Profile & Table, & Study Coverage

**TABLE V-2**  
**BATHTUB & SHOWER FIXTURES DEMAND BY PRODUCT**  
 (million dollars)

Item	2004	2009	2014	2019	2024
Residential Building Construct (bil 2009\$) (6 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					

Source: The Freedonia Group, Inc.

### COMPANY PROFILES

#### Briggs Plumbing Products Incorporated

597 Old Mount Holly Road  
 Goose Creek, SC 29445  
 843-569-7887  
 www.briggsply.com

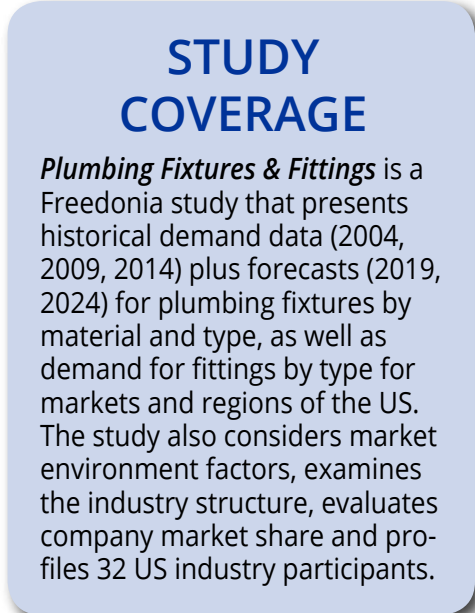
Annual Sales:  
 Employment:

Key Products: bathtubs, showers, bidets, urinals, faucets and other fittings

Briggs Plumbing Products is a manufacturer of bathroom and kitchen fixtures and fittings for residential, hospitality, and commercial applications in the North American and Caribbean markets. The Company is privately held.

The Company competes in the US plumbing products industry through the manufacture of bathtubs, lavatories, kitchen sinks, toilets, bidets, urinals, faucets and other fittings, and related accessories. Briggs Plumbing maintains manufacturing facilities in Charleston, South Carolina and Flora, Indiana.

Bathtubs from Briggs feature slip-resistant bottoms and rounded watertight corners and primarily include BISCAY varieties, which are made from the Company's ULTRATUFF material; and PENDANT types, which are made with porcelain-enameled steel. Specifically, ULTRATUFF metal consists of a porcelain enameled finish on heavy-gauge-formed steel with a polyurethane elastomer backing. In addition, the Company manufactures LIBERTY bathtubs from the Company's ULTRACAST material, which consists of porcelain enamel fired onto formed steel and reinforced with a polyurethane elastomer backing.





## Related Studies

### World Solid Surface & Other Cast Polymers

Global demand for cast polymers will rise 6.6 percent yearly to 246 million square meters in 2019, with a value of \$23.1 billion. The Asia/Pacific region will remain the largest and fastest-growing market. Solid surface will remain the dominant type while engineered quartz, marble and other stone will grow the fastest. This study analyzes the 179 million square meter world cast polymer industry, with forecasts for 2019 and 2024 by type and application for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

#3335.....October 2015.....\$6400

### Countertops

Demand for countertops in the US is forecast to increase 4.2 percent annually to 810 million square feet in 2019, valued at \$29.3 billion. Engineered stone, natural stone and various niche surfaces will be the fastest growing countertop materials. The dominant residential market will offer the best growth opportunities. This study analyzes the 660 million square foot US countertop industry, with forecasts for 2019 and 2024 by surface material, product, application, and market. The study also evaluates company market share and profiles industry competitors.

#3301.....August 2015.....\$5500

### Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will rise 2.2 percent annually through 2019 to \$7.1 billion, driven by pent-up demand for automated floor cleaning equipment. Office and institutional buildings will remain the largest and fastest growing markets. In-house purchasers will remain dominant, but will be outpaced by contract cleaners. This study analyzes the \$6.4 billion US janitorial equipment and supply industry, with forecasts for 2019 and 2024 by product, market and purchaser. The study also evaluates company market share and profiles industry competitors.

#3311.....August 2015.....\$5300

### Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players.

#3281.....July 2015.....\$5500

### World Plumbing

Through 2018, global demand for plumbing fixtures and fittings will advance 5.3 percent annually to over \$70 billion. The Asia/Pacific region will post the fastest growth, with North America also expected to post significant gains. Growth in the residential construction market will outpace the nonresidential sector. This study analyzes the \$54.4 billion world plumbing product industry, with forecasts for 2018 and 2023 by type, material, market, world region, and for 23 countries. The study also evaluates company market share, and profiles industry participants.

#3253.....February 2015.....\$6400

## About The Freedonia Group

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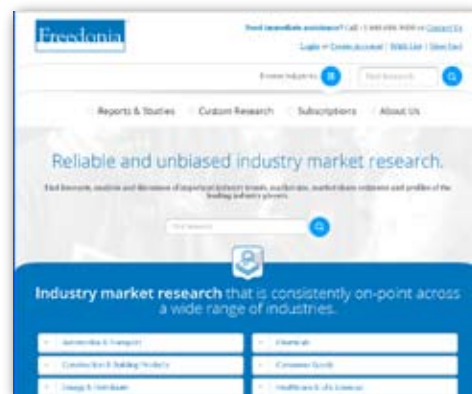
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