

Behind-the-Wall Plumbing

US Industry Study with Forecasts for 2020 & 2025

Study #3392 | March 2016 | \$5300



Behind-the-wall plumbing products comprise the pipe and fittings used in water distribution and drain, waste, and vent (DWV) applications, as well as those items used in fire suppression systems, such as valves and fire sprinklers. Growth will be spurred by the expected increase in building construction expenditures, as well as by design trends that call for homes and businesses to have multiple and larger bathrooms with more fittings, which will boost demand for distribution and DWV pipe to carry water to and from supply and sewer mains. However, more rapid demand gains will be checked by continuing consumer demand for low-cost plastic products at the expense of metal products traditionally used in behind-the-wall plumbing.

Pipe lines increase

Pipe accounted for the largest share of behind-the-wall plumbing products demand in 2015 and will remain the leading product used in this market going forward. Gains will be supported by rising interest in homes and businesses with more bathrooms. In many cases, bathrooms will be located far from existing pipe networks, necessitating pipe runs to connect fixtures to water supply and disposal lines. Increasing demand for such amenities as radiant floor heating, his-and-her vanities, and whirlpool bathtubs will also promote pipe demand, as these features require dedicated plumbing pipe lines.

PEX continues to show ease of use, cost effectiveness

In terms of material types, PEX and PVC pipe will see the strongest growth in demand through 2020 because of

their low cost and ease of installation. PEX is forecast to experience the most rapid gains of all pipe material types as it continues to supplant copper in water distribution applications. Copper pipe will remain the leading pipe material in value terms due to its high per-foot price. However, copper pipe demand in terms of length will advance modestly in the face of competition from plastic pipe.

Fittings & valves show fastest gains

The increasing length and complexity of pipe networks will boost the use of couplings to connect pipes of varying diameters and tees and elbows to change the direction of pipe runs. Demand for pipe supports will rise as builders add clamps and hangers to PEX pipe installations to ensure consistent flow rates. Valve demand in behind-the-wall plumbing will be supported by the intensive use of valves in fire suppression systems to maintain specific pressure levels and to quickly open supply lines in case of fire.

Study coverage

This study analyzes the US behind-the-wall plumbing industry. It presents historical demand data (2005, 2010 and 2015) and forecasts (2020 and 2025) by product (e.g., pipe, fittings, valves, sprinklers), market (e.g., residential buildings, nonresidential buildings), application (e.g., fire suppression systems, distribution, drain, waste and vent), and region. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles US industry competitors.

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PRODUCTS

Demand for tees in behind-the-wall plumbing applications is forecast to grow building construction structure, and the demand for residential building extensive use in

SAMPLE
TEXT

Tees are T-shaped fittings that either combine or separate fluid flows. Tees can be used to connect two pipes to each other (especially if the pipes are of different diameters) or change the direction of a pipe run. If it is necessary to connect a pipe run to another, a special tee -- a cross -- can be used. Crosses are most often specified for fire suppression systems, where water must be quickly transported to a specific part of a building. Crosses are usually more costly than tees they must be constructed to withstand high pressures.

In potable water distribution and DWV applications, multiple tees can be used to control fluid flows, with welding or special fasteners used to prevent leaks in case the tee is subjected to extreme temperature changes or high-volume water flows. In distribution systems, tees transport potable hot and cold water from main lines to bathrooms and kitchens. In DWV systems, tees connect drainage pipes to the pipes that run to the sewer main. These tees often have larger diameters than those specified for distribution applications. Multiple tees and crosses are installed in fire suppression systems to ensure that sprinkler heads receive water in case of a fire.

A variety of materials can be used to manufacturing plumbing tees. Plastic products dominate plumbing applications, with PVC and PEX seeing the most use. Brass can be used in structures where more durable

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TABLE III-5

Behind-the-Wall Plumbing Tees Demand by Application

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|--|------|------|------|------|------|
| Behind-the-Wall Fittings Demand (mil \$) % tees | | | | | |
| Plumbing Tees Demand (mil \$) | | | | | |
| Distribution | | | | | |
| DWV | | | | | |
| Fire Suppression Systems | | | | | |
| Plumbing Tees Demand (000 units) | | | | | |
| Distribution | | | | | |
| DWV | | | | | |
| Fire Suppression Systems | | | | | |

SAMPLE
TABLE

Source: The Freedonia Group

TABLE IV-1

Behind-the-Wall Plumbing Products Demand by Application

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|------|------|------|------|------|
| Building Construction Expenditures (bil \$) \$ BTW plumbing/000\$ construction | | | | | |
| Behind-the-Wall Plumbing Prdts Demand | | | | | |
| Fire Suppression Systems | | | | | |
| Distribution | | | | | |
| DWV | | | | | |

SAMPLE
TABLE

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Plumbing Fixtures & Fittings

US demand for plumbing fixtures and fittings will rise 6.3 percent annually to \$12.3 billion in 2019. The larger fixtures segment will post faster gains, supported by consumer interest in higher-value products. The fittings segment will benefit from the replacement of older and less-efficient faucets and showerheads with newer models that use less water. This study analyzes the \$8.4 billion US plumbing product industry, with forecasts for 2019 and 2024 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#3346.....November 2015.....\$5500

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

World Housing

Worldwide construction of new housing units is forecast to increase 3.0 percent annually to 2.3 billion units in 2019. North America and Western Europe will see the fastest growth from a depressed 2014 base. On a global basis, new construction of multifamily units will outpace single-family units. This study analyzes the 2.1 billion unit world housing industry, with existing stock and new unit forecasts presented for 2019 and 2024 by type in six world regions and 22 major countries. The study also considers economic trends, demographics, and other market factors.

#3312.....July 2015.....\$5900

World Plastic Pipe

World demand for plastic pipe will rise 6.7 percent per year through 2019 to 19.3 billion meters. Construction applications account for the largest share of plastic pipe demand and will support growth through the forecast period. Growth in the Asia/Pacific region will slow, but it will remain the largest and fastest growing market. This study analyzes the 13.9 billion meter world plastic pipe industry, with forecasts for 2019 and 2024 by market and resin for six world regions and 19 major countries. The study also evaluates company market share and profiles industry competitors.

#3272.....July 2015.....\$6500

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

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