This report looks at the following areas:

- How the pandemic impacted installations in the first half of 2020 and the strength of the recovery in the second half, which continued into 2021 and has remained strong in the first half of 2022.
- The major implications and challenges created by the government’s net zero targets for the central heating sector and how new technology is evolving, further stimulated by fuel-based inflation in 2022.
- The fragmentation of the bathroom product sectors, which extends to individual product sectors and purchase-decision influencers, giving rise to opportunities for consolidation.
- The wide variety of influences on market demand and how they fluctuate and react to wider economic conditions.

The pandemic caused a major disruption to the plumbing products sector, but the recovery was strong in the second half of 2020 as pent-up demand combined with generally strong demand conditions. Conditions remained strong in 2021 but have come under very different pressures in 2022 as consumer spending has been challenged by growing inflation and rising interest rates. Nonetheless, the housing imbalance in the UK has sustained house-price inflation and encouraged house-moving activity, both traditional drivers of demand.

The Ukraine invasion and the sanctions placed on Russia are having a profound impact on fuel supplies across Europe, and the government is facing mounting pressure to increasingly intervene in order to protect consumers and businesses from the consequent inflation. At the same time, the net zero ambitions of the government have profound implications for the heating sector of the market with heat being the largest energy end-use and contributing to 40% of global carbon dioxide emissions.

Clearly, the extreme pressure placed on consumers from fuel-based inflation in 2022 brings vulnerability to discretionary purchases. With 80% of the plumbing

“COVID-19 strongly disrupted plumbing product markets in the first half of 2020, but there was a strong recovery in the second half of the year that continued into 2021, though with less impact from pent-up demand.”
– Terry Leggett, Senior Analyst, August 2022

Plumbing - UK - 2022


The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.
products sector dependent on replacement products, conditions are difficult. However, the market held up surprisingly well in the first half of 2022, largely sustained by strong house-moving activity with kitchens and bathrooms seen as lifestyle features.

Major changes are occurring in the heating element of the market with the government looking to experiment with hydrogen as a means to reduce fossil fuel usage, and actively promote heat pumps as a replacement for conventional boilers. At the same time, consumer attention is being drawn to fuel efficiency by the extreme inflation levels seen in 2022 and likely to persist into 2023.
# Table of Contents

## OVERVIEW
- Key issues covered in this Report
- Market context
- Products covered in this Report

## EXECUTIVE SUMMARY
- The five-year outlook for plumbing products
  - Figure 1: Plumbing products outlook, 2022-27
- The market
- Market size and forecast
  - Figure 2: Market size for plumbing products, 2016-26
- Markets with separate influences
  - Figure 3: Segmentation of the plumbing products sector, 2021 (£ million)
- Companies and brands
- Plumbing
  - Figure 4: Development of plumbing and heat and air-conditioning installing companies, 2016-2020
- Bathroom products
  - Figure 5: Development of the ceramic bathroom products industry, 2016-21
- Kitchen furniture
  - Figure 6: Development of the kitchen furniture industry, 2016-21
- The heating industry
  - Figure 7: Development of the central heating radiators and boilers industry, 2016-21

## ISSUES AND INSIGHTS
- Is a new boiler really the answer to fuel-based inflation?
- Market changes in other sectors

## MARKET SIZE AND PERFORMANCE
- Major disruption
  - Figure 8: Market size for plumbing products, 2016-21

## MARKET FORECAST
- Changing demand factors
  - Figure 9: Plumbing products outlook, 2022-27
- Medium-term prospects remain steady
  - Figure 10: Market forecast for plumbing products, 2021-26
- Forecast methodology
MARKET SEGMENTATION - OVERVIEW

- Fragmented product base
  Figure 11: Segmentation of the plumbing products sector, 2021 (£ million)

MARKET SEGMENTATION – COMMERCIAL HEATING

- Background
- COVID-19 disruption
  Figure 12: Market size of commercial heating products, 2016–21
- Product segmentation
  Figure 13: Product segmentation of commercial heating products market, 2021 (£ million)
- Market forecast
  Figure 14: Forecast market size for commercial heating products, 2021–2026

MARKET SEGMENTATION – RESIDENTIAL HEATING

- Background
  Figure 15: Residential central heating boilers in England, by type, 2001–20
- Renewable Heat Incentive (RHI)
  Figure 16: Accredited applications under the RHI, 2011–2022
- Clean Heat Grant
- Boiler Scrappage Scheme/Energy Company Obligation
- Boiler Upgrade Scheme
- COVID-19 disruption but strong recovery
  Figure 17: Market size of residential heating products, 2016–2021
- Product segmentation
  Figure 18: Product segmentation for residential heating boilers, 2021
  Figure 19: Residential heating system installations, by fuel type, 2021
- Market forecast – major changes ahead
  Figure 20: Forecast market size for residential heating products, 2021–2026

MARKET SEGMENTATION - BATHROOMS

- Background factors
- Strong fluctuations from the pandemic
  Figure 21: Market size of bathroom-based plumbing products, 2016–2021
- Market segmentation
Figure 22: Market segmentation for bathroom products, 2021

- Product segmentation
  Figure 23: Product segmentation of bathroom products, 2021
- Market forecast
  Figure 24: Forecast market size for bathroom-based plumbing products, 2021-26

MARKET SEGMENTATION - KITCHENS

- Market background
  Figure 25: International comparison of UK average house sizes
- COVID-19-related market fluctuation
  Figure 26: Market size of kitchen-based plumbing products, 2016-21
- Segmentation
  Figure 27: Segmentation of kitchen plumbing products, 2021 (£ million)
- Market forecast
  Figure 28: Forecast market size for kitchen-based plumbing products, 2021-26

MARKET DRIVERS

- Overview
- Inflation is the key concern for consumers and brands...
- ... and will weigh down the post-COVID-19 recovery
- Consumer spending power will be curbed
- The conflict in Ukraine is hurting the UK economy in a number of ways
- Employment has held up better than expected
- Consumers’ financial wellbeing has fallen from the highs of 2021...
  Figure 29: Household financial wellbeing index, 2016-2022
- ... and most people are feeling the effects of price rises
- New housebuilding
  Figure 30: Housing completions in England, by sector, 1978-2021
- Housing stock
- Volume
  Figure 31: Number of UK households, 1991-2021
- Geographical distribution
  Figure 32: UK housing stock, by region, 2021 (000s)
- Factors impacting investment decisions
- Interest rates
Figure 33: Bank rate, by date of adjustment, 2009-22

- **House prices**
  Figure 34: House price inflation, 2006-22

- **Housing transactions**
  Figure 35: Residential property transactions in the UK, by country, 2006-2022 (number)

- **Home ownership**
  Figure 36: The impact of housing tenure on bathroom facilities, 2019
  Figure 37: The impact of housing tenure on kitchen replacements, 2019

- **Home improvement activity**
  Figure 38: Home improvements identified as still needed, 2019/20

- **Trade refurbishment – public housing**
  Figure 39: The public housing RMI construction market, 2016-21

- **Trade refurbishment – private housing**
  Figure 40: The private housing RMI construction market, 2016-21

- **DIY activity**

- **Non-residential applications**
  Figure 41: New construction activity in selected public and private commercial and industrial sectors, 2015-21 (£ billion)

**INDUSTRY STRUCTURE**

- **Plumbing**
  Figure 42: Development of plumbing and heat and air-conditioning installing companies, 2016-2020
  Figure 43: Structure of the plumbing and heat and air-conditioning installation industry, 2020
  Figure 44: Development of the central heating radiators and boilers industry, 2016-21

- **Bathroom products**
  Figure 45: Development of the ceramic bathroom products industry, 2016-21
  Figure 46: Development of the other fabricated metal products industry, 2016-21
  Figure 47: Development of the other plastic building products industry, 2016-21

- **Kitchen furniture**
  Figure 48: Development of the kitchen furniture industry, 2016-21

---

**What’s included**

Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook
Previous editions

---

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

---

**Buy this report now**

Visit store.mintel.com

<table>
<thead>
<tr>
<th>Region</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMEA</td>
<td>+44 (0) 2076064533</td>
</tr>
<tr>
<td>Brazil</td>
<td>0800 095 9094</td>
</tr>
<tr>
<td>Americas</td>
<td>+1 (312) 943 5250</td>
</tr>
<tr>
<td>China</td>
<td>+86 (21) 6032 7300</td>
</tr>
<tr>
<td>APAC</td>
<td>+61 (0) 2 8284 8100</td>
</tr>
</tbody>
</table>
• The heating industry
  Figure 49: Development of the central heating radiators and boilers industry, 2016-21

COMPANY PROFILES
• Bathroom products
  • Geberit
  • Activity
  • Performance
    Figure 50: Turnover development of Geberit, 2016-21
    Figure 51: Turnover breakdown of Geberit, 2021
    Figure 52: Turnover segmentation of Geberit, by activity, 2021
• Strategy
  • Ideal Standard (UK)
  • Activity
  • Performance
    Figure 53: Financial performance of Ideal Standard (UK), 2017-21 (£ 000)
• Strategy
  • Kohler Mira
  • Activity
  • Performance
    Figure 54: Financial performance of Kohler Mira, 2016-20 (£ 000)
• Strategy
  • Norcros
  • Activity
  • Performance
    Figure 55: Financial performance of Norcros, 2018-22 (£ million)
    Figure 56: UK turnover segmentation of Norcros, 2022 (£ million)
• Strategy
  • Heating
  • Purmo Group UK – previously Rettig (UK)
  • Activity
  • Performance
    Figure 57: Financial performance of Purmo Group UK, 2016-20 (£ 000)
• Strategy
  • Resideo Technologies
  • Activity
  • Performance
Figure 58: Financial performance of Resideo Technologies, 2018–21 ($ million)
Figure 59: Segmentation of Resideo Technologies products and solutions revenues, 2021 ($ million)
Figure 60: Segmentation of ADI Global Distribution revenues, 2021 ($ million)

- Strategy
- Vaillant Group
- Activity
- Performance
  Figure 61: Financial performance of Vaillant Group UK, 2016–20 (£ 000)
- Strategy
- Fittings and pipes
- Mueller Europe
- Activity
- Performance
  Figure 62: Financial performance of Mueller Europe, 2016–20 (£ million)
- Strategy
- Genuit Group (formerly Polypipe Group)
- Activity
- Performance
  Figure 63: Financial performance of Genuit Group, 2017–21 (£ million)
  Figure 64: Turnover segmentation of Genuit Group, 2021
- Strategy
- Wavin
- Activity
- Performance
  Figure 65: Financial performance of Wavin, 2016–20 (£ million)
- Strategy

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

APPENDIX: FORECAST METHODOLOGY

- Market forecast and prediction intervals
  Figure 66: Market forecast for plumbing products, 2021–26 (£ million)
- Market drivers and assumptions
  Figure 67: Key economic drivers, 2016–26
- Forecast methodology
About Mintel

Mintel is the expert in what consumers want and why. As the world’s leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster.

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.