“The plumbing products sector is continuing to benefit from stronger new construction activity, and demand from this sector has grown faster during the recovery than retail sales activity. Prospects for the plumbing products market are strong, particularly as wet rooms are identified by consumers as a key feature of the home.”
– Terry Leggett, Senior B2B Analyst

This report looks at the following areas:

• How strongly will the market develop over the next five years?
• Is that growth sustainable over the entire five years and what will be the market drivers?
• Which regions hold the best prospects?
• Which product sectors now hold the best prospects?
• How have companies involved in the market fared during the downturn that followed 2008?

This report covers the UK market and industry for plumbing products - comprising domestic central heating products, commercial heating products, water heating products, bathroom and sanitaryware products, tubes, pipes and fittings, and kitchen products.
Plumbing Products - UK - August 2015

Executive Summary

The market
Figure 1: Development of the UK market for plumbing products, 2010-14 actual and 2015-19 forecast
Figure 2: Segmentation of the UK market for plumbing products, 2014
Figure 3: Development of the UK market for domestic central heating products, 2010-14 actual and 2015-19 forecast
Figure 4: Development of the UK market for commercial heating products, 2010-14 actual and 2015-19 forecast
Figure 5: Development of the UK market for bathroom products, 2010-14 actual and 2015-19 forecast
Figure 6: Development of the UK market for plumbing products for kitchens, 2010-14 actual and 2015-19 forecast
Figure 7: Development of the UK market for pipes and fittings, 2010-14 actual and 2015-19 forecast

Market factors
Figure 8: Development of the selected UK new construction markets, 2010-14 actual and 2015-19 forecast
Figure 9: Development of the UK housing repair & maintenance markets, 2010-14 actual and 2015-19 forecast

Companies
Figure 10: Structure of the plumbing/HVAC installation trade sector, 2014

What we think

Key Issues

What are the key driving forces for the plumbing products market?
Is the internet becoming more important for the marketing of plumbing products?
Are integrated product suites still leading sales?
What effect is the lacklustre performance of DIY activity having?
Will changes in interest rates restrict sales opportunities?

Introduction

Definitions
Methodology
Abbreviations
Market positioning and issues in the market
Market factors

Market Size and Trends

Key analysis
UK economy
Overview
Figure 11: UK GDP quarterly development, 2003-15
Figure 12: UK GDP in economic downturns and recoveries since 1979
Inflation
Interest rates
House prices

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com
Consumer spending

Manufacturing

Business investment

Figure 13: UK GFCF 2003-15

Imports

Exports

Market size

Figure 14: The UK plumbing products market, by value, 2010-14

Market segmentation

Figure 15: Segmentation of the UK market for plumbing products, 2014

Overview

Figure 16: Segmentation of the UK plumbing products market, by type of product, 2010-14

Domestic central heating products

Figure 17: The UK domestic central heating market, by value, 2010-14

Figure 18: Segmentation of the UK market for domestic central heating products, 2014

Figure 19: Segmentation of the UK domestic central heating market, by type of product, 2010-14

Commercial heating products

Figure 20: The UK market for commercial heating products, by value, 2010-14

Figure 21: Segmentation of the UK market for commercial heating products, by type, 2010-14

Figure 22: Segmentation of the UK market for commercial heating products, 2014

Bathroom and sanitaryware/toiletware

Figure 23: The UK bathroom equipment market, 2010-14

Figure 24: UK market for bathroom equipment, by type of product, 2010-14

Figure 25: Segmentation of the UK market for bathroom equipment, 2014

Figure 26: Development of the UK market for toiletware/sanitaryware, 2010-14

Figure 27: UK market for sanitaryware/toiletware, by product, 2010-14

Figure 28: Segmentation of the UK market for sanitaryware/toiletware products, 2013

Figure 29: The UK market for showers and shower enclosures, 2010-14

Figure 30: Segmentation of UK market for showers, by application, 2014

Figure 31: Development of the UK market for bathroom accessories, 2010-14

Figure 32: Segmentation of the UK bathroom accessories market, by type of product, 2010-14

Figure 33: Material segmentation of the UK bathroom equipment accessories market, by type, 2014

Kitchen products

Figure 34: Segmentation of the UK market for plumbing products used in kitchens, by type, 2010-14

Tubes, pipes and fittings

Figure 35: UK market for plastic tubes and pipes, 2010-14

Figure 36: UK market of plastic tubes and pipes, by type, 2010-14

Figure 37: UK market for copper tubes and pipes, 2009-13

Regional analysis
Figure 38: Regional public housing construction output, 2010-14
Figure 39: Regional private housing construction output, 2010-14
Figure 40: Regional public non-residential construction output, 2010-14
Figure 41: Regional private commercial construction output, 2010-14

Seasonal analysis
Figure 42: Seasonality of public housing output, 2010-14
Figure 43: Seasonality of private housing output, 2010-14
Figure 44: Seasonality of public non-residential construction output, 2010-14
Figure 45: Seasonality of private commercial construction output, 2010-14

Market Background
Key analysis

Construction
Figure 46: Construction output in Great Britain, by type, 2010-14

Private housing
Figure 47: Analysis of private housing construction output in Great Britain, 2010-14
Figure 48: Private new housing starts and completions in England, 2010-14

Public housing
Figure 49: Analysis of new public housing construction output in Great Britain, 2010-14
Figure 50: Public housing starts and completions in England, 2010-14
Figure 51: Trends in the gross supply of affordable housing in England, by tenure 2010-14

Public non-residential
Figure 52: Long term trend in public non-residential construction activity in Great Britain, 1970-2014
Figure 53: Analysis of public sector non-residential construction output in Great Britain, 2010-14
Figure 54: Analysis of public sector non-residential construction in Great Britain, by type, 2010-14

Health
Education
"Other" sector

Private commercial
Figure 55: Long term trend in private commercial construction output in Great Britain, 1970-2014
Figure 56: Analysis of private commercial construction in Great Britain, by type, 2010-14

Consumer Research – Plumbing Projects Undertaken

Plumbing projects undertaken
Figure 57: What major plumbing projects have you undertaken in the last 5 years?

Consumer Research – Bathroom Fittings Installed or Replaced in the Last 5 Years

Bathroom fittings installed or replaced in the last 5 years
Figure 58: Bathroom fittings installed or replaced in the last 5 years

Consumer Research – Kitchen Fittings Installed or Replaced in the Last 5 Years

Kitchen fittings installed or replaced in the last 5 years

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Plumbing Products - UK - August 2015

Report Price: £1495.00 | $2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

---

**Consumer Research – Starting Point for a Bathroom Refurbishment or Replacement**

Starting point for a bathroom refurbishment or replacement
Figure 60: Starting point for a bathroom refurbishment or replacement

---

**Consumer Research – Attitudes to Refurbishing or Replacing a Bathroom**

Attitudes to refurbishing or replacing a bathroom
Figure 61: Attitudes to refurbishing or replacing a bathroom

---

**Consumer Research – Approach to Kitchen Refurbishment or Replacement**

Approach to kitchen refurbishment or replacement
Figure 62: Approach to kitchen refurbishment or replacement

---

**Consumer Research – Attitudes to Refurbishing or Replacing a Kitchen**

Attitudes to refurbishing or replacing a kitchen
Figure 63: Attitudes to refurbishing or replacing a kitchen

---

**Industry Structure**

Key analysis
Figure 64: Structure of the plumbing/HVAC installation trade sector, 2014

Industry development
Figure 65: Analysis of the changes in the structure of the central heating radiators and boilers industry, 2010-14
Figure 66: Analysis of the changes in the structure of the ceramic tiles and flags industry, 2010-14
Figure 67: Analysis of the changes in the structure of the other fabricated metal products industry, 2010-14
Figure 68: Analysis of the changes in the structure of the other plastic building products industry, 2010-14
Figure 69: Analysis of the changes in the structure of the kitchen furniture industry, 2010-14

Structure by employment
Figure 70: Analysis of the employment structure of the central heating radiators and boilers industry, 2013-14
Figure 71: Analysis of the employment structure of the ceramic tiles and flags industry, 2013-14
Figure 72: Analysis of the employment structure of the other fabricated metal products industry, 2013-14
Figure 73: Analysis of the employment structure of the other plastic building products industry, 2013-14
Figure 74: Analysis of the employment structure of the kitchen furniture industry, 2013-14

Structure by turnover
Figure 75: Analysis of the financial structure of the central heating radiators and boilers industry, 2013-14
Figure 76: Analysis of the financial structure of the ceramic tiles and flags industry, 2013-14
Figure 77: Analysis of the financial structure of the other fabricated metal products industry, 2013-14
Figure 78: Analysis of the financial structure of the other plastic building products industry, 2013-14
Figure 79: Analysis of the financial structure of the kitchen furniture industry, 2012-13

---

**Company Profiles**

**Ideal Standard (UK)**
Figure 80: Financial analysis of Ideal Standard (UK), 2009-13

---

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Company strategy

Valliant Group UK

Figure 81: Financial analysis of Valliant Group UK, 2009-13

Company strategy

Honeywell Control Systems

Figure 82: Financial analysis of Honeywell Control Systems, 2009-13

Company strategy

Yorkshire Copper Tube/KME Yorkshire

Figure 83: Financial analysis of KME Yorkshire, 2009-13

Company strategy

Rettig (UK)

Figure 84: Financial analysis of Rettig (UK), 2009-13

Company strategy

Polypipe Group

Figure 85: Financial analysis of Polypipe Group, 2010-14

Company strategy

Twyford Bathrooms

Figure 86: Financial analysis of Twyford Bathrooms, 2010-14

Company strategy

Kohler Mira

Figure 87: Financial analysis of Kohler Mira, 2009-13

Company strategy

Wavin

Figure 88: Financial analysis of Wavin, 2009-13

Company strategy

Norcros

Figure 89: Financial analysis of Norcros, 2011-15

Company strategy

Forecast

Key analysis

Market size

Figure 90: Forecast UK market for plumbing products, by value 2015-19

Market segmentation

Figure 91: Forecast segmentation of the UK market for plumbing products, by type of product, 2015-19

Further Sources and Contacts

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533  |  Brazil 0800 095 9094
Americas +1 (312) 943 5250  |  APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com
Trade associations
Trade magazines
Trade exhibitions

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.