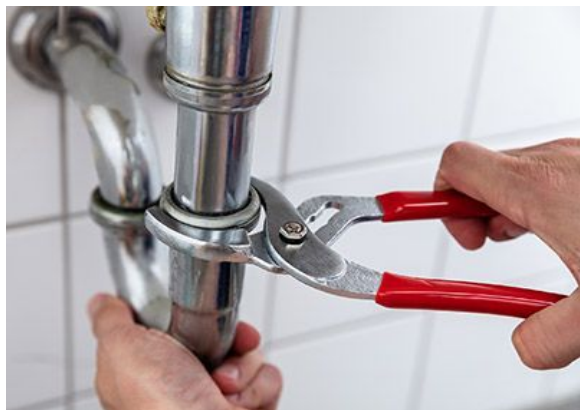


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“While the new construction market is growing, the major element of the market for plumbing products is the R&M market that is proving more sluggish despite many of the conditions remaining positive. Long-term fashion changes are also impacting the market such as the en suite trend and open-plan living.”

– Terry Leggett, Senior Analyst

This report looks at the following areas:

- **When will the replacement market recover?**
- **Climate change – an increased focus of attention**

The most important area of demand for plumbing products is the replacement market, strongly associated with the repair, maintenance and improvement (RMI) activity. Kitchens and bathrooms are among the most important rooms for home owners to personalise their homes and make lifestyle choices. Yet the high cost of replacement causes some hesitancy in investment in times of economic uncertainty, which is currently being associated with the Brexit decision, though employment appears plentiful according to official statistics, suggesting there should be greater certainty over such investments. A key factor in the decision has long been associated with house price inflation which gives the home owner the impression that the expenditure is also an investment as well as a lifestyle statement. These markets have been boosted by other fashion trends. En suite bathrooms are now widely found in new houses and have become a common retrofit in older properties. The more recent trend in kitchens is for open-plan living, with the kitchen not only becoming the eating area but now often being incorporated in the living area. In the longer term this may well lead to more frequent refurbishment of kitchens.

The central heating market is much more of a 'grudge' purchase for replacement purposes, but the installation of modern efficient boilers is critical to government emission targets and so various government incentives have been used to try to boost the market.

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DID YOU KNOW?

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

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