



**Water Saving Bathroom
Products Market
Research & Analysis
UK 2016**

**Water Saving Products Market Size & Trends 2010-2020; SWOT & PEST
Analysis, Water Saving Bathroom Products Shares 2010-2020; Bathroom
Manufacturers & Retailers Profiles & Key Financials; Market Forecasts to 2020**

1st Edition

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. This report provides vital market intelligence in terms of size, product mix, SWOT, PEST, key product trends and influences and industry structure trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads, with a multi-use mailing list and additional financial data available as part of the 'Ultimate Pack' option with this report.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT, Ansoff Matrix & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Historical, Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 3 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK WATER SAVING BATHROOM PRODUCTS MARKET

2.1 Market Definition & Report Methodology

The UK Water Saving Bathroom Products Market comprises of a wide range of products and services relating primarily to the UK domestic new build and RMI (Repair, Maintenance & Improvement) market. This report reviews the size and trends of these products and services, alongside analysis of key market influences and likely future prospects for the market in the medium to longer term. A 3 year financial review of more than **130 manufacturers and retailers** of Water Saving Bathroom Products is also included in order to provide as comprehensive review of the market as possible in 2016.

Specifically, this report reviews the UK water saving bathroom products market between 2010 and 2016 with forecasts to 2020. Market size and product trends are reviewed alongside key market influences, opportunities and threats in early 2016. The market is defined as consisting of products primarily designed for use in UK domestic bathrooms and distributed through a wide range of distribution outlets. Market size and trends are provided for:-

- **Baths** – Water saving / low volume baths (Capacity 155 litres or less.)
- **WCs** – single and dual flush cisterns (lowest flush capacity of 3.5 litres)
- **Basin Taps** – Mixer taps, Aerated faucet valves, remote sensor taps, digital controls, Mechanical / timed flow caps. (max 6 Litres per minute flow rate)
- **Mixing Valves** – – Bar mixers, Shower/bath mixers, concealed mixers, electric mixer valves (max 6 Litres per minute flow rate)
- **Shower outlets** – Shower heads (max 6 Litres per minute flow rate)
- **Electric Showers** (max 6 Litres per minute flow rate)
- **Water Saving Bathroom Accessories** – Leak detection tablets, flow rate measurers, inflatable and other displacement devices, flow regulating valves, aeration valves etc.

The market is measured at Manufacturers Selling Prices (MSP) and we have sought to exclude any import / distribution costs, VAT and other applicable taxes, rebates, grants or other income not relating specifically to the sale of Water Saving Bathroom Products and services identified above. There are a large number of products and components within the water saving bathroom retailers market and inevitably there is a degree of overlap between the sectors. As such, the figures contained within this report should be regarded as estimates.

This first edition report represents a comprehensive overview of the UK Water Saving Products Market in 2016 and is the **only** 'off the shelf' report available for less than £600 which specifically reviews the UK water saving bathroom products market incorporating both qualitative and quantitative research input.

The methodology for this report included analysis of sales, profit and financial data from more than 130 key players in the industry coupled with primary research information from Government sources, manufacturers, bathroom

retailers, contractors, distributors, manufacturers and other trade sources through telephone & other media.

The primary research data is supported by secondary research from trade journals, company reports, Companies House, HM Customs, Government statistics, trade associations, company websites and existing knowledge in this sector. MTW Research have been researching the bathroom products market for more than 15 years and are well placed to offer a comprehensive and informative review of this industry.

2.2 Water Saving Bathroom Products Market - Executive Summary

The UK water saving bathroom products market is currently valued at some £xx million in 2016, with growth of around x% likely to the year end. This reflects xxxxx market conditions as the UK economy continues a track of xxxxx xxxxx as consumer confidence levels xxxxx and property transaction rates xxxxx along with the xxxxx xxxxx of xxxxx xxxxx products.

The water saving bathroom products market is exhibiting xxxxx xxxxx, following xxxxx trading conditions. This is supported by xxxxx xxxxx attitudes towards spending from xxxxx, in line with xxxxx xxxxx levels, rising xxxxx and sustained xxxxx low xxxxx xxxxx rates. xxxxx activity is set to continue to increase in the near term, with new xxxxx xxxxx at a 7 year high, and an estimated 1.2 million xxxxx in 2015 in the UK, reflecting a xxxxx xxxxx xxxxx of demand for bathroom refurbishments. Forecasts are for xxxxx xxxxx activity to exceed 1.3 million in 2017, which should xxxxx xxxxx market conditions for the water saving bathroom products market alongside a xxxxx xxxxx.

Market and product development over the next 4 years is forecast to generate total xxxxx xxxxx of around £xx million for the market, with xx% of this derived from xxxxx products sold to xxxxx xxxxx target markets. The development of new products targeted at existing markets is forecast to contribute around x% of the growth in the market over the next 4 years.

The largest sector of the water saving bathroom products market is currently estimated to be the xxxxx market, representing just over x% of total bathroom sales, a market value of around £x million. xxxxx xxxxx, the second largest sector, accounts for just under 30% of sales in 2016, worth around £xx million.

xxxxx are classed as a water saving bathroom product as they have a universally low flow rate and are therefore all classified as 'water saving'. However they are xxxxx in terms of xxxxx usage and requiring large amount of xxxxx to run.

The water saving WCs market currently accounts for around x% of sales. xxxxx xxxxx are currently estimated to account for just over 6% of UK water saving bathroom products sales in 2016, reflecting a value of around £x million.

Water saving xxxxx and xxxxx xxxxx are both estimated to have a market share of around 4%. The water saving xxxxx xxxxx sector has the smallest market share of just under 1%, with sales of these products valued at £x million in 2016. In terms of future prospects for the water saving bathroom products market, our forecasts are for sales to be worth just over £xxx million in current price terms

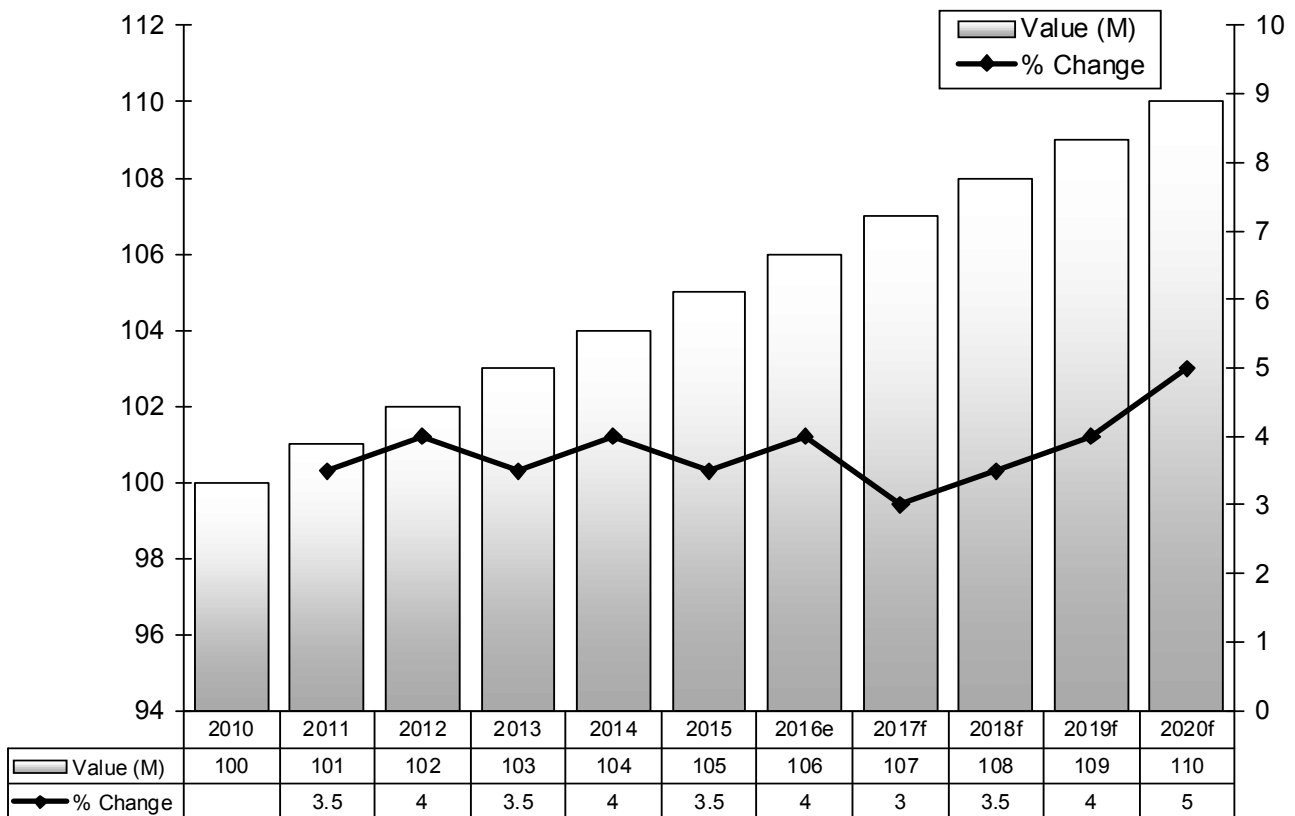
by 2020. Medium to longer term prospects are xxxxx xxxxx for market with sales set to xxxxx xxxxx by around x% in the next 4 years. However the xxxxx xxxxx slowing as impetus from xxxxx purchases slows and xxxxx in terms of near term xxxxx xxxxx xxxxx persists.

2.3 WATER SAVING BATHROOM PRODUCTS MARKET SIZE & TRENDS 2010-2020

2.3.1 Water Saving Bathroom Products Market Size 2010-2020 – Current Prices

The UK water saving bathroom products market is estimated to be worth just over £xxx million in 2016 as illustrated in the following chart (figures changed for sample purposes):-

Figure 1: Water Saving Bathroom Products Market – UK 2010 - 2020 By Value £M



Source: MTW Research / Trade Estimates

Sales of water saving bathroom products are currently estimated to be worth some £xxx million in 2016, with xxxxx xxxxx of around xx% likely to the year end, reflecting xxxxx xxxxx market conditions in xxxxx xxxxx a challenging xxxxx xxxxx overall. The water saving bathroom products market is heavily reliant on the xxxxx xxxxx xxxxx xxxxx the xxxxx bathroom products market, with current trends and purchasing patterns xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx water saving products.

As illustrated above, the market is exhibiting xxxxx xxxxx xxxxx xxxxx, reaching a value of just over £xx million in 2016. The market xxxxx xxxxx xxxxx xxxxx in xxxxx after the xxxxx with xxxxx continuing into xxx. Whilst performance remains xxxxx xxxxx, the xxxxx xxxxx is xxxxx slowing xxxxx xxxxx xxxxx levels. The observed xxxxx xxxxx is largely xxxxx xxxxx xxxxx in xxxxx xxxxx

xxxxx xxxxx rates since 2013, which has xxxxx xxxxx xxxxx in the market as consumers seek to xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx bathrooms. However there will continue to be xxxxx xxxxx xxxxx across the market with xxxxx xxxxx xxxxx from xxxxx xxxxx sales increasingly characteristic of the market.

For the purpose of this report it is necessary to define 'water saving products' to enable a quantitative measurement of the market value to be calculated. This report defines a product as water saving if it falls into any of the categories below.

- **Shower Mixers** – 6 Litres per minute or less.
- **Shower Outlets** – 6 Litres per minute or less.
- **Electric Showers** – 6 Litres per minute or less at 'normal' operating temperature range.
- **Baths** – Actual Bath Capacity 155 litres or less, effective capacity 62 litres of less.
- **Basin Taps** – 6 Litres per minute or less
- **WCs** – Single flush volume of 3.5 litres or less
- **Bathroom Accessories** – Any product whose primary function is to reduce water use within the bathroom.

xxxxx xxxxx xxxxx investment in environmental issues has xxxxx xxxxx consistently over the past decade. Well documented xxxxx xxxxx xxxxx xxxxx and global climate conferences have highlighted the xxxxx xxxxx xxxxx xxxxx need to act in respect to xxxxx xxxxx xxxxx xxxxx. This has translated into manufacturers xxxxx xxxxx xxxxx in water xxxxx xxxxx xxxxx and energy xxxxx xxxxx xxxxx bathroom products. This is a trend that is xxxxx xxxxx xxxxx to xxxxx xxxxx in the long term as xxxxx change xxxxx xxxxx an xxxxx xxxxx xxxxx and well xxxxx xxxxx xxxxx issue.

The growing sense of xxxxx xxxxx which began in xxx as the xxxxx began to xxxxx xxxxx xxxxx has xxxxx xxxxx over the last few years. However the initial xxxxx xxxxx in 2013 and 2014, has now began to subside with xxxxx xxxxx returning to xxxxx xxxxx xxxxx xxxxx levels. Nevertheless xxxxx xxxxx is forecast at around x% for 2016, providing xxxxx xxxxx xxxxx xxxxx conditions for xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx across the water saving bathroom products market.

Throughout much of the domestic bathroom products market there has been a continued xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx, with this primarily due to the xxxxx xxxxx xxxxx xxxxx xxxxx products resulting in xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx value products which superficially may xxxxx xxxxx xxxxx xxxxx to xxxxx xxxxx xxxxx xxxxx xxxxx products. This issue is especially relevant in the water saving products market with numerous xxxxx xxxxx xxxxx xxxxx using 'water saving' and 'eco' branding to xxxxx xxxxx xxxxx through various xxxxx xxxxx xxxxx xxxxx xxxxx channels.

Therefore the market environment remains xxxxx xxxxx for the water saving bathroom market in 2016. To year end December 2015, the water saving

products market exhibited growth of 4%, a xxxxx xxxxx xxxxx from xx% in 2014. The overall

Water Saving Products Likely to Exhibit Growth 2017-2020

Products which should enjoy demand growth as a result of these and other issues include, but are not necessarily limited to:-

- xxxxx xxxxx water saving xxxxx
- Water saving xxxxx xxxxx xxxxx
- xxxxx xxxxx (e.g xxx, xxxxxx options)
- xxxxx xxxxx (primarily xxxxx demand)
- The above illustrates the key trends in the channel are likely to be derived from the

2.3.6 Positive Influences for Water Saving Bathroom Products 2016 - 2020

In addition to the above, there are also number of factors which should offer some growth prospects in the near-medium term, including:-


- xxxxx xxxxx xxxxx prompting strong xxxxx xxxxx in general
- Historically xxxxx xxxxx xxxxx, boosting xxxxx xxxxx xxxxx income
- Growth in xxxxx xxxxx xxxxx by UK and European manufacturers
- Rising xxxxx xxxxx xxxxx as business xxxxx strengthens
- Openness from xxxxx xxxxx xxxxx xxxxx saving products
- Growing availability of xxxxx xxxxx xxxxx consumers with xxxxx xxxxx, boosting xxxxx xxxxx xxxxx xxxxx xxxxx activity.
- 'xxxxx xxxxx boosting xxxxx xxxxx transactions, stimulating xxxxx xxxxx activity.
- Manufacturers xxxxx xxxxx xxxxx xxxxx strategies to combat xxxxx xxxxx xxxxx xxxxx retailing & xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx.
- Easier xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx.
- xxxxx xxxxx xxxxx as an xxxxx xxxxx to xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx.
- xxxxx 'xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx
- xxxxx requirements – e.g. xxxxx xxxxx, xxxxx xxxxx, xxxxx xxxxx etc driving demand for products which meet modern xxxxx xxxxx requirements.
- Trend for xxxxx xxxxx and xxxxx xxxxx xxxxx xxxxx in the home.
- xxxxx development – Improved xxxxx xxxxx & more xxxxx xxxxx from bathroom manufacturers the xxxxx xxxxx xxxxx xxxxx xxxxx grows.

Whilst the above does not represent an exhaustive list of positive market trends, it nevertheless highlights a broad range of key market drivers which should sustain industry growth in the medium to longer term.

2.3.7 Strategic Growth Share for Water Saving Bathroom Products Market 2016-2020

The following table illustrates our estimates of the share by strategic direction for the anticipated £xxx million of market growth to 2020:-

Figure 9: Water Saving Products Market Growth Share by Ansoff Strategy 2016-2020

	Existing Product	New Product
Existing Market  New Market	Market Penetration X% (Contributing around £x million between 2016 & 2020)	Product Development X% (Contributing around £x million between 2016 & 2020)
	Market Development X% (Contributing around £x million between 2016 & 2020)	Diversification X% (Contributing just over £x million between 2016 & 2020)

Source: MTW Research Strategic Review 2016

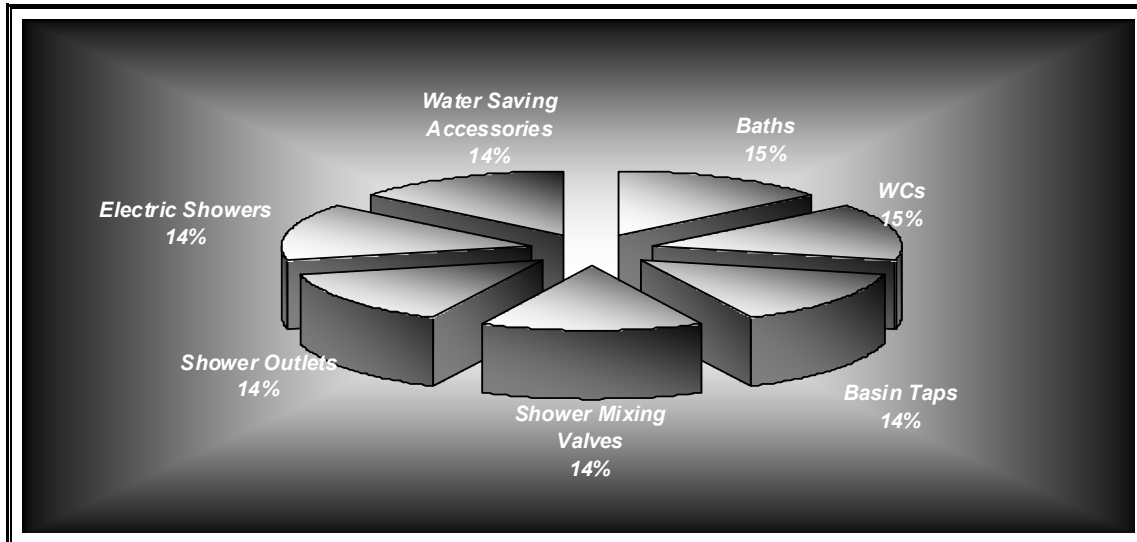
Activity in terms of market and product development over the next 4 years is forecast to generate total xxxxx revenue of around £x million for the water saving bathroom products industry. The above table illustrates that x% of the growth anticipated in the market during the next 4 years is likely to be derived from

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2016, 2010 & 2020

The share accounted for by each of the key sectors within the UK Water Saving Bathroom Market in 2016 is illustrated in the following chart (figures changed for sample purposes):

Figure 25: Key Product Shares in Water Saving Bathroom Products Market 2016



Source: MTW Research / Trade Estimates

As the above chart illustrates, the UK water saving bathroom product market comprises of a range of product sectors with a variety of uses, including:-

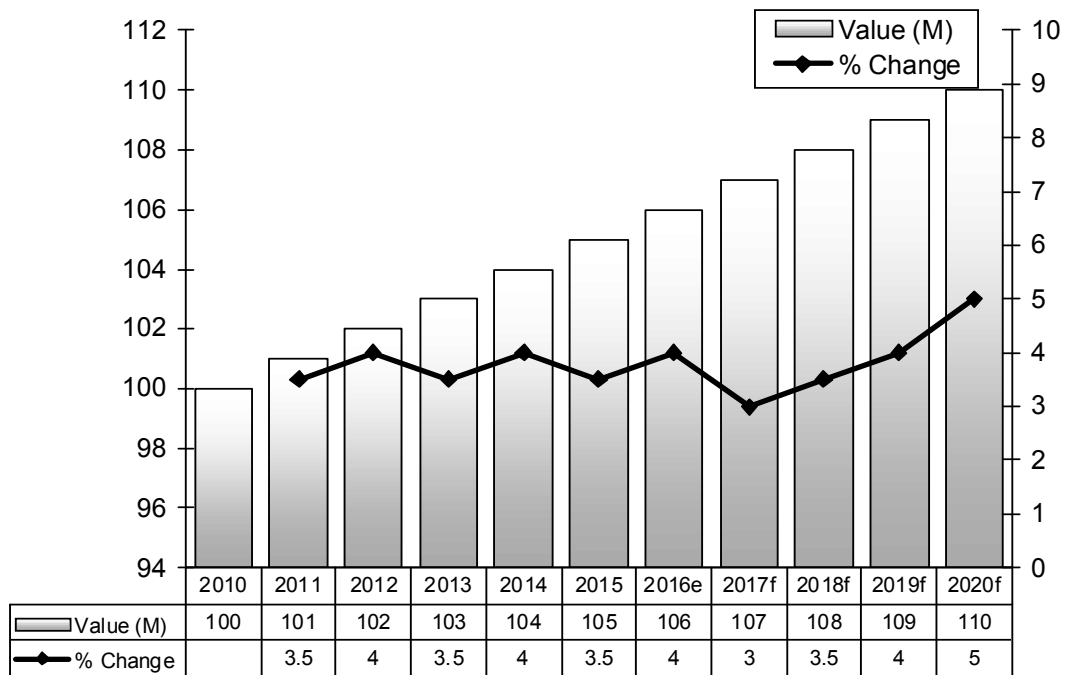
- **Baths** – Corner, Freestanding, Traditional
- **WCs** - Single flush, Dual flush
- **Basin Taps** – Sensor, Aerated, Multi flow, Low flow rate
- **Shower Mixing valves** – Bar mixers, Shower/Bath mixers, Concealed mixers, Electric mixer valves
- **Electric Showers**
- **Shower Outlets** – Low flow shower heads, multi flow shower heads
- **Water Saving Bathroom Accessories** – Leak detection tablets, Flow rate measurers, Inflatable displacement devices, Flow regulating valves, Aeration valves

The largest sector of the water saving bathroom products market is currently estimated to be the

3.2 Water Saving Baths Market Current Prices – UK 2010-2020

The following chart illustrates our estimates of the performance of the sales of water saving baths since 2010 with forecasts to 2020 (figures changed for sample):-

Figure 28: Water Saving Baths Sales – UK 2010 - 2020 £M



Source: MTW Research / Trade Estimates

This sector of the UK water saving bathroom products market incorporates a relatively small range of products, including:-

- Baths (Single / double acrylic sheet, porcelain enamel steel & cast iron, copper, resin stone / cast stone, gel coated reinforced polyester etc) – All with a capacity of 155 litres or less.

As illustrated above, sales of these products are estimated to reach just under £xxx million by year end December 2016, reflecting a xxx% increase in value of just under xx% since 2010. This equates to a value of just under £xx million over a 6 year period.

Sources indicate that the water saving baths market has shown xxxxxxxx in recent years, with a xxxxxxxx increase in 2014 as xxxxxxxx and the xxxxxxxx after the xxxxxxxx and xxxxxxxx of 2010-2012. Estimates are for the sector to exhibit further growth in the near term with sales rising by just under x% in 2016, followed by xxxxxxxx in 2017 of just over x%.

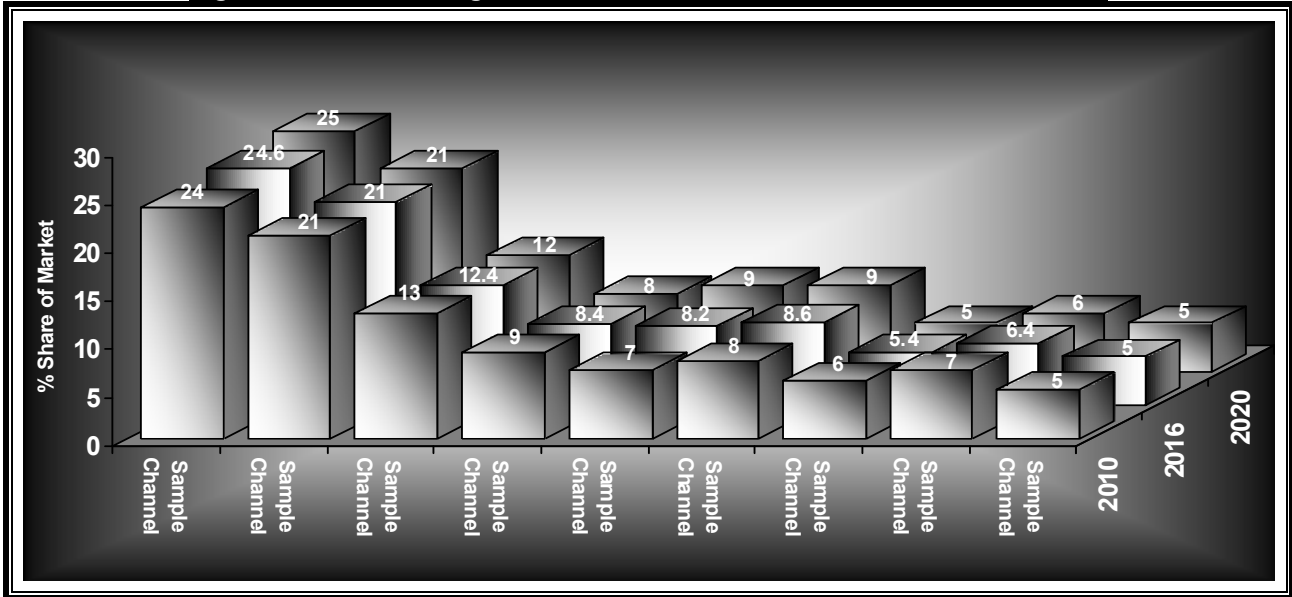
The following chart illustrates our estimates of performance of sales of water saving baths by constant value in 2016:-

4. WATER SAVING PRODUCTS DISTRIBUTION SHARES

4.1 Distribution Channel Shares for Water Saving Products 2010, 2016 & 2020

The following chart illustrates the channel share for water saving products in 2010, 2016 and 2020 for each of the key channels in the market:-

Figure 62 Water Saving Products Distribution Channel Shares 2016-2020



Source: MTW Research / Trade Estimates

The xxxxx xxxxxxxx market accounts for the largest proportion of the market in 2016, with a share of just under x%, reflecting sales of around £xx million at manufacturers selling prices.

The xxxxx xxxxxxxx xxxxx xxxxxxxx market is also significant in this market due to the majority of companies active in this channel operating in the xxxxx xxxxxxxx xxxxx xxxxxxxx of the market in which the majority of water saving bathroom products reside. Sales through this channel are estimated at £xx million in 2016, reflecting a share of around xx%. This channel, which is explored in further detail later in this report is indicated to have xxxxx xxxxx xxxxx in terms of overall share in recent years with this set to characterise the channel in the medium to longer term.

Sales through DIY multiples are

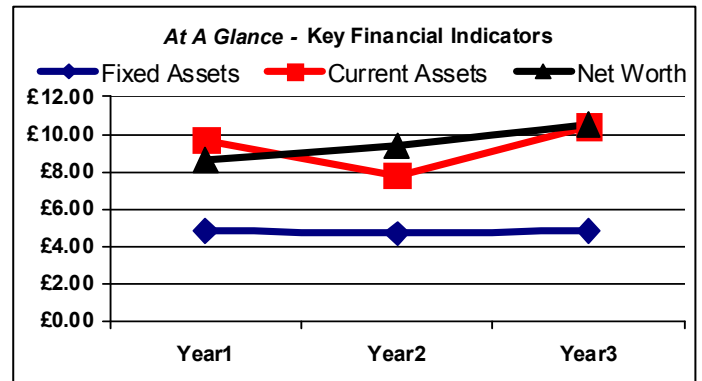
5. WATER SAVING BATHROOM PRODUCTS PROFILES

The following section identifies some of the key UK manufacturers active in this market and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

5.1 Water Saving Manufacturers Profiles & 3 Year Key Performance Indicators

Sample Manufacturer Co - Company Overview & 'At a Glance'

Address Road
Town
County
Postcode
Tel: Sample



Sample Co Ltd is a public limited company, incorporated on 10th October 1984. The company's main activities are recorded by Companies House as "Manufacturing And Selling Polymer Concrete And Stainless Steel Drainage Systems And Other Corrosion Resistant Products." In 2016, the company has an estimated 200 employees. To year end December 2015, Sample Co Ltd is estimated to have achieved a turnover of around £40 million. Pre-tax profit for the same period is estimated at around £3.5 million. The following table briefly provides a top line overview on Sample Co Ltd:-

Company Name	Sample Co Ltd
Brief Description of Activities	Manufacturing And Selling Polymer Concrete And Stainless Steel Drainage Systems And Other Corrosion Resistant Products.
Parent Company	Sample Co Ltd Holdings Gmbh
Ultimate Holding Company	Sample Co Ltd Holdings Gmbh
Estimated Number of Employees	200
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

Sample Co Ltd - 3 Year Financials to Year End 31-Dec-14

Key Indicator £M	Year End 31-Dec-12 (Year1) £M	Year End 31-Dec-13 (Year2) £M	Year End 31-Dec-14 (Year3) £M
Fixed Assets	£4.87	£4.7	£4.86
Current Assets	£9.7	£7.82	£10.4
Current Liabilities	£5.85	£3.14	£4.7
Long Term Liabilities	£0.11	-	-
Net Worth	£8.61	£9.37	£10.54
Working Capital	£3.85	£4.67	£5.7
Profit per Employee	£0.012	£0.014	£0.018
Sales per Employee	£0.186	£0.194	£0.201

6. Bathroom Retailers Industry Trends 2010-2020

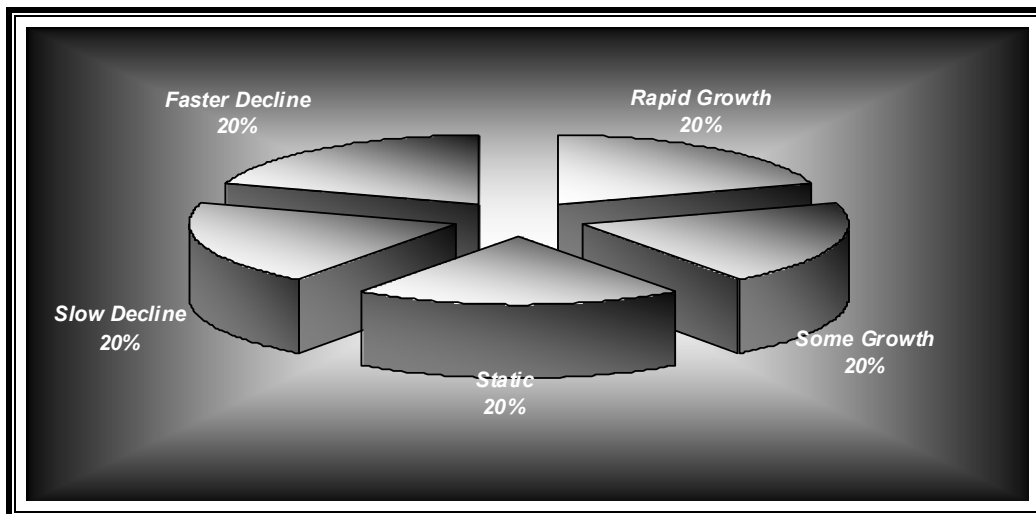
6.1 Bathroom Retailers Market – Industry Structure

The following section reviews the independent UK bathroom retailers market in 2016 in terms of industry structure based on industry financial sales data and provides key performance indicators for the UK bathroom retailers market.

6.1.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 106: Market Share by Bathroom Retailers Sales Growth / Decline 2015-2016



Source: MTW Research / Company Accounts

For the preceding 12 months to December 2016, our estimates suggest that around xx% of the market experienced growth which could be described as 'rapid', with sales rising by more than 10% per year. Further, around xx% of the bathroom retailers market is estimated to have experienced some sales growth over the last 12 months. This underlines a slight improvement in levels of market performance when considering that our last report in 2013 found that 30% were experiencing rapid growth in sales.

However, whilst the above chart identifies that around xx% of the market grew sales over the last 12 months, xx% of bathroom retailers reported a decline in sales, reflecting

6.3.4 Bathroom Retailers Ranking by Profitability

The following table illustrates the profit ranking for each company in 2015:-

Figure 123: Bathroom Retailers Ranked By Profit 2015