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Bathrooms Market Report – UK 2011 – 2015 Analysis

New AMA report provides a major review of the UK Bathrooms Market

“With the downturn in the economy, consumers have been seen to add value to their property through refurbishment, instead of moving house. Rather than going to the expense of extending their property, they are making the best use of existing space. Products such as brassware, accessories and modular furniture can be bought to update the overall ‘look’ of the bathroom at a lower cost than a total refurbishment. With the growing use of the Internet, consumers are now far better informed than they were a decade ago. This has raised expectations and awareness of affordable, design-led bathroom products. Consumers are now active participants in the home improvement process and no longer passively take expert advice.”

A brief summary of the report is included on the following page.

Priced at £665, the report is currently available from AMA Research Ltd, Telephone 01242 235724 or e-mail at sales@amaresearch.co.uk.

Editors Note:

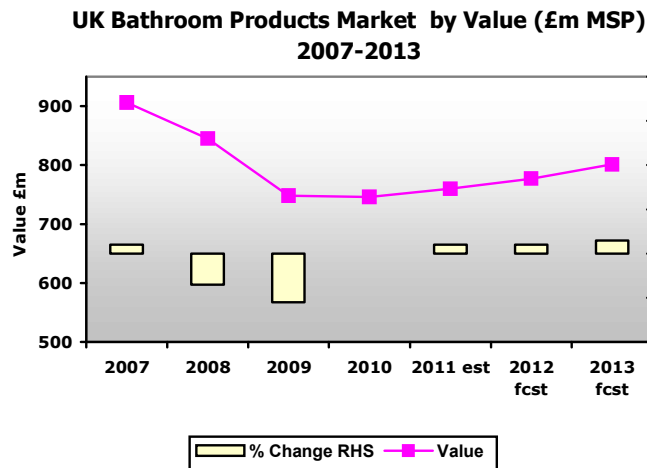
Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Chris Moore or Keith Taylor on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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The UK bathroom products market had been growing in volume and value until the recent economic downturn, but like other higher value consumer goods has been under considerable pressure more recently, resulting from the difficult new housebuilding sector and also the challenging home improvement sector. The market has an estimated value of around £760 million at Manufacturers Selling Prices (MSP) in 2011. This represents a moderate increase of around 2% when compared to the market size in 2010 and reflects the continuing fragility of the UK economy. However forecasts indicate that the UK bathroom products market will return to modest growth in 2012-13 as consumer

confidence and housebuilding levels gradually improve.

Estimated at £278 million in 2010, baths and sanitaryware were the largest sector of the bathroom products market. This was followed by bathroom accessories (£194m), brassware (£158m), bathroom furniture (£83m) and whirlpool/spa systems (£33m). Within the baths and sanitaryware sector, the leading manufacturers in 2011 are Ideal Standard UK with Ideal Standard and Armitage Shanks, the Sanitec Corporation with Twyford Bathrooms and Jacuzzi UK. Importers such as Roca also have a significant presence in this market.

Bathroom products for the domestic and commercial sectors are distributed through a wide range of channels. The main distribution channel continues to be builders and plumbers merchants with the DIY multiples also holding a substantial share. Other retail channels include bathroom specialists, grocery multiples, mail order retailers and department stores. Online e-tailers are also becoming more important as consumers increasingly use the Internet to source the best deals.

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There has been a significant increase in the level of imports from low cost countries, particularly from China and Eastern Europe. Imports continue to account for a significant proportion of bathroom products sold in the UK, exposing the market to a high level of price competition.

Bathroom products installed in non-domestic applications are likely to decline, with major cutbacks in capital spending announced in the October 2010 Capital Spending Review. Education and health will see a decline in funding over the next five years. However there is likely to be some short term demand in the hotel and leisure sector emanating from the final preparations for the 2012 Olympic Games and also the Commonwealth Games in 2014.

By 2015, the overall market value is forecast to be £864 million at MSP, which would represent an increase of around 14% compared to the estimated market size in 2011.

AMA Research's report "**Bathrooms Market Report - UK 2011-2015 Analysis**" is available in hard copy or electronic format for £665 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.