

FOR IMMEDIATE RELEASE OCTOBER 2011

Shower Market Report – UK 2011 – 2015 Analysis

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

"The UK shower equipment market has an estimated value of around £438 million at Manufacturers Selling Prices (MSP) in 2011. This represents a moderate increase of around 1% when compared to the market size in 2010 and reflects the continuing fragility of the UK economy. Forecasts indicate that the UK shower equipment market will return to modest growth in 2012-13 as consumer confidence and housebuilding levels gradually improve. By 2015, the overall market value is forecast to be £500 million at MSP, which would represent an increase of around 14% compared to the estimated market size in 2011."

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.**

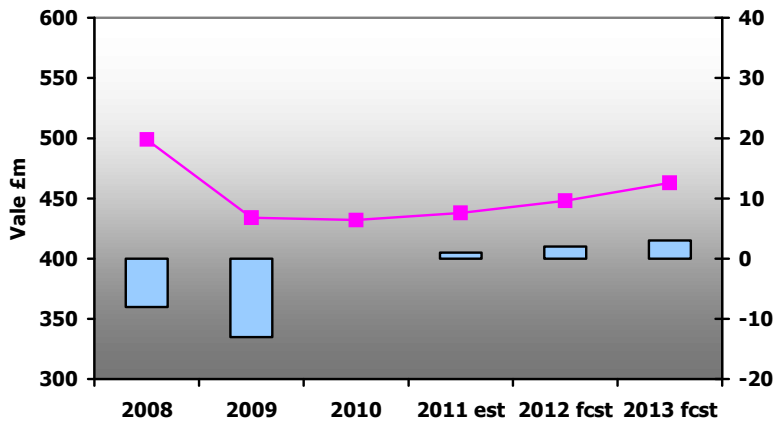
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Chris Moore or Keith Taylor on (01242) 235724.

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.

AMA Research Ltd
Montpellier House
Montpellier Drive
Cheltenham
Gloucestershire GL50 1TY
Tel: +44 (0)1242 235724
Fax: +44 (0)1242 262948
E-mail: keithtaylor@amaresearch.co.uk
Website: www.amaresearch.co.uk

Shower Market Report – UK 2011-2015 Analysis

**UK Shower Equipment Market by Value
(£m at MSP)2008-2013**



The UK shower equipment market has an estimated value of around £438 million at Manufacturers Selling Prices (MSP) in 2011. This represents a moderate increase of around 1% when compared to the market size in 2010 and reflects the continuing fragility of the UK economy. Forecasts indicate that the UK shower equipment market will return to modest growth in 2012-13 as consumer confidence and housebuilding levels gradually improve. By 2015, the overall market value is forecast to be £500 million at MSP, which would represent an increase of around 14% compared to the estimated market size in 2011.

Shower controls account for the greatest proportion of the market with 45% of the overall shower equipment market. Enclosures, screens and trays have grown their share of the market in recent years and now account for only a fraction less than the shower controls sector at 44%. Shower accessories account for the remaining 11%.

Shower 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.

With the maturing UK shower market there are greater levels of replacement purchases. Many shower products are now designed specifically for retrofit purposes. Sales of replacement shower accessories such as hoses and handsets are also increasing year on year. With the UK economic downturn, shower products installed in new housing has declined significantly in the last 2-3 years. This has particularly impacted on mixer control sales.

With the downturn in the housing market, householders have been seen to 'improve don't move'. Rather than going to the expense of extending their property, they are making the best use of existing space such as minimalist bathroom refurbishments and the replacement of baths with wetroom areas. The downturn in the UK economy has led to an increasing number of lower priced 'entry level' showers such as utility or contract mixers. Electric showers have also gained share during the downturn as they are perceived as relatively cheap to run as stored hot water is not required.

The number of showers installed in new houses will start to increase with some recovery in private housing starts evident as the UK economy stabilises. However, key factors such as mortgage availability and high deposit requirements are likely to continue to impact on the rate of recovery in the short term. Housing starts in the public sector are expected to decline as spending cuts and the removal of regional housebuilding targets impacts on social housing construction levels.

The shower equipment market will continue to fragment and the number of own label products is likely to increase. Cheaper products sourced from abroad will continue to put pressure on prices. Manufacturers will need to increase brand recognition and create greater product differential by investing in more distinctive 'added value' designs.

AMA Research's report "**Shower 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.