

## Kitchen & Bathroom Products in the Housebuilding Market Report - UK 2016-2020 Analysis

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### Introduction and Overview

The first edition of the **'Kitchen & Bathroom Products in the Housebuilding Market - UK 2016-2020 Analysis'** covers the installation of kitchen and bathroom products in the new home sector and includes an analysis of new build trends, the market size of kitchen and bathroom products in the new housing sector, segmentation, comment on future prospects and implications for manufacturers and the industry as a whole. Written by marketing professionals with considerable experience of the kitchen and bathroom products industry, this report provides a detailed and comprehensive review of the market, which is influenced by the economy, government schemes, consumer trends and demographics.



### Key content covered:

- Newbuild housing market - current state, key market influences, important trends, completions and forecasts, buying & specification process.
- Review of kitchen and bathroom products in new housebuilding, covering:
  - Kitchen products - furniture, worktops, sinks and tapware.
  - Kitchen appliances - cooking, refrigeration, dishwashing, laundry.
  - Bathroom products - baths, sanitaryware, mixer taps, accessories, furniture, whirlpools/spa baths etc.
  - Shower products - shower controls, enclosures, screens and trays, wetroom products, accessories etc.

### Recent trends include:

- Estimated performance for 2016 and forecasts for 2017 - 2020. Forecasts are based on the current economic situation and the potential impact of Brexit on the housebuilding sector in the short to medium term.
- The trend towards open-plan living in new build homes - how this has influenced kitchen design and the products used in new houses, e.g. built-in appliances, coordinated design.
- The technical and brand specification process in the housebuilding market - key influencers and the decision making process.
- The growing importance of choice and the use of brands as an added-value feature, with homebuyers increasingly

- specifying kitchen and bathroom products from a selection, often at no extra cost.
- With housebuilders now focusing on larger family homes, the demand for bathroom and shower products has increased. A positive influence has been the trend towards 2+ bathrooms / en-suites in new build homes.
- Homebuyers are increasingly demanding 'hotel-style' quality interiors. This trend is motivating housebuilders to offer higher quality fixtures and finishes.
- Detailed market data and insight on the kitchen & bathroom products in the housebuilding market by AMA Research, a leading UK provider of construction market intelligence.

### **Kitchen Products in the New Build Sector**

- Overall market size by value, key trends and factors influencing the new build sector, forecasts through to 2020, taking into account the economic environment, current industry forecasts, in the light of the EU referendum, etc.
- New build kitchen market trends including open plan layouts, minimalist designs, popularity of the kitchen-diner, custom design, importance of brands etc.
- Overall product mix - % share by value - furniture, appliances, worktops, sinks and tapware.
- Kitchen furniture - including fitted and freestanding, influences, new build design trends etc.
- Kitchen appliances - key design trends, influences, technological developments etc.
- Kitchen worktops - laminates, composites, natural stone, influences, product trends etc.
- Other products - sinks, tapware, PODs, design trends, developments etc.

### **Bathroom Products in the New Build Sector**

- Overall market size by value, key trends and factors influencing the new build sector, forecasts through to 2020, taking into account the economic environment, current industry forecasts, in the light of the EU referendum, etc.
- New build bathroom market trends - number of main bathrooms, en-suites/additional bathrooms, cloakrooms in houses, wetrooms etc.
- Overall product mix - bathroom products, shower products, % share by value.
- Bathroom products - baths, sanitaryware, mixers, accessories, furniture, new build product trends, developments etc.
- Shower products - shower controls, enclosures, screens, trays, wetroom products, accessories, product trends, new build influences etc.
- Bathroom PODs - new build end use sectors, benefits, trends etc.

### **Buying and Specification Process**

- Technical specification - private and social housing, decision process.
- Brand specification - housebuilder, local authority, influences.
- Purchasing - sub contractor / installer, distribution, builders and plumbers merchant, distributor, direct from manufacturer.
- Factors influencing choice - regulatory, availability, quality, design, cost etc.

## **New Housing Market**

- Definition - private housing, local authority housing, owned by RSLs.
- Key market influences - UK economy, buy to let sector, housing demand and supply, demographics, land availability and planning etc.
- Housing completions - overall figures, future projections, by private and public sector, mix of completions - flats, houses, housing moving trends etc.
- Demographic influences - household size, life expectancy trends etc.
- The housebuilders - leading players, market shares, self-build sector etc.

## **Overall Kitchen & Bathroom Products Market**

- Overall market size, development and key influences, estimates of market size in 2016, forecasts through to 2020.
- Overall product mix - kitchen appliances, kitchen furniture, bathroom products, shower products, by value.
- Market trends by product sector - key market trends, developments etc.

## **Report Summary**

The new housebuilding market is an important end use sector for kitchen and bathroom products, and in 2015 it was estimated to account for approximately 13% of the overall UK kitchen and bathroom products market. The market for kitchen and bathroom products in newbuild housing increased by an estimated 12% in 2015 reflecting the continued steady improvement in the UK economy, consumer confidence levels and significant growth in the UK housebuilding market in particular. Following a static period between 2011 and 2013, market conditions have steadily improved in 2014 and 2015 with housebuilding levels showing good growth, supporting new build kitchen sales via contractors, developers, distributors and the merchants. The shift towards three and four bedroom homes has supported larger new build kitchens and additional utility room installations in the new build sector.

Key trends in new build kitchens include; a focus on layout and design, growing popularity of kitchen-diners with a seating area, growing demand for 'hotel-style' quality interiors, increasing focus on durability, particularly in the social housing sector, increasing usage of well-known reputable brands of kitchen appliances in order to attract buyers and an increasing choice of worktop materials and designs.

Key trends in new build bathrooms include; a trend towards 2+ bathrooms / en-suites, increasing investment in quality fixtures and fittings offering longevity and luxury, minimalist designs, 'future proofing' of bathrooms so they can be easily adapted to changing needs, increasing popularity of wetroom areas, higher usage of digital technology in the premium sector, e.g. digital shower controls, spa baths, sensor operated mixer taps etc.

The new housing sector continued to recover with steady growth rates to mid-2016, underpinned by mortgage assistance schemes such as Help to Buy, a more buoyant economy and undersupply for a number of years. Housebuilders continue to focus on family homes, which should drive sales of larger, higher value kitchens. With a growing proportion of flats and apartments expected in the longer term and the small size of the average UK bathroom and kitchen, there will be a continuing demand for space-saving solutions. For example, wall-hung sanitaryware, clever kitchen storage designs, slim-line appliances, compact bathroom furniture, the shower bath etc. The referendum decision to leave the EU has resulted in some economic uncertainty and housebuilders are likely to remain cautious. Consequently, this may result in a lower level of housing starts in 2017, which will affect volume sales of bathroom and kitchen products into the new housing sector. However, overall value could be lifted somewhat by the higher costs of imported raw materials and products, which may support value growth in the kitchen and bathroom sector.

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