

## Washroom Products in the Education and Health Sector Report - UK 2012-2016 Analysis

Published: 08/03/2012 / Number of Pages: 74 / Price: ~~£845.00~~ £495.00

### Introduction and Overview

AMA Research are pleased to announce the publication of the first edition of the report '**Washroom Products in the Education and Health Sectors Report - UK 2012-2016 Analysis**'. Offering excellent value for money, this report represents a current and informed assessment of this market sector, incorporating original input and primary research.



### Key issues covered:

- Market sizes for baths, basins, wcs/urinals, showers, brassware and panel systems in each of the health and education sectors.
- Overall commercial washroom market size for each of health and education sectors.
- Market and product trends and opportunities in each of the two sectors.
- Review of the healthcare and education sectors.
- Review of the key suppliers into these sectors.

Having recently been the most buoyant sectors for construction, the combination of a new government, the 2010 Spending Review and austerity measures are impacting on construction activity in the education and health sectors. The report assesses the latest situations in each of the sub-sectors and the recent impacts on the demand for washroom products.

The report also assesses the future prospects for each of these key sectors for washroom products, with forecasts for washroom product performance over the next few years to 2016 and with indications of the key trends and issues in each of the end use sectors, that are likely to influence the future development of the washroom product market.

### Areas of particular interest include:

- A shift away from major hospital schemes towards local and primary health facilities and financial uncertainty could mean a shift from new hospital builds to less-costly refurbishment schemes.

- The emphasis on less costly refurbishment projects will increase in the education sector, and a significant number will be required in the near future with around 70% of washroom installations in the schools sector now over 20 years old.
- Increasing emphasis on both hygiene issues and the sustainability issues for washroom products in the health sector.
- Detailed market data and insight on the washroom products in the education and health market by AMA Research, a leading UK provider of construction market intelligence.

#### **Companies featured in the report include:**

Abacus Healthcare, ABP-TBS (TBS Fabrications), Acorn Powell, Advanced Showers, AKW Medi-Care, AL Challis Ltd, Altecnic, Amwell Systems, Applied Energy Products, Aquabirths Ltd, ArjoHuntleigh, Armitage Shanks, Armitage Venesta, Astor Bannerman, Atlas Washroom Systems, Autumn UK, Barwood Products, Bathsystem, Baudet, Breuer, Bristan Group, Bushboard Washroom Systems, Canberra Wells Group, CCK Stainless Products, Chiltern Invadex, Contour Showers, Coram Showers, Cubicle Centre, Dahll, Decra, Deva, Douglas Delabie, Douglas James, DSM Stainless Products, EJ Badekabiner, Elliot Group, Ensuite Solutions, Eurocare Showers, European Ensuites, Franke Sissons, Gainsborough Baths, Gateway Pods, GEC Anderson, Gordon Ellis, Grant Westfield, Grohe, Hansgrohe, Honeywell Control Systems, Horne Engineering, Ideal Standard UK, Impey, Inscape Cubicles and Washrooms, Intatec, Just Trays, KingKraft, Kohler Mira, Kondor Bathroom Pods, Lakes Bathrooms, Lecico, Marflow Engineering, Masco Corporation, Methven UK, MX Group, N&C Phlexicare, NT Stainless, Offsite Solutions (RT), Opella, Pegler Yorkshire Group, Pland Stainless, Premdor Crosby, Premier Bathrooms, Pressalit Care, Prospec, Rada Controls, RAK Ceramics UK, Relcross, Reliance Water Controls, Reva Industries, Rodin Group, Roman, RS Building Products, Saniflex UK, Sanitec Corporation, Sanlamere UK, Saville Stainless, Stainless Design Services, Sunrise Medical, Taplanes, Tenon Washrooms, Thomas Dudley, Thrislington Cubicles, Triton, Twyford Bathrooms, Vandal Resistant Sanitaryware Group (VRSG), Walker Modular, Wallgate, Washroom Washroom, Watts Industries UK, WH Foster & Sons.

#### **Washroom Products in the Education Sector**

- Overall market size, value and trends for washrooms in the education sector.
- Both current trends and future prospects are analysed.
- Key factors influencing the market, the cancellation of BSF, a reduction in capital spending, the growth of the Higher education sector.
- Percentage shares by product sector and analysis of the product mix in 2011. This sector addresses the key washroom products including basins, brassware/taps, WCs and urinals, baths, showers and panel products.
- Product trends and services offered by suppliers to the education sector including varying sanitaryware heights, thermostatic brassware etc.
- Major suppliers of washroom products to the education sector and key suppliers within each product sector.
- Key factors influencing the sector and economic and socio economic influences.

#### **Washroom Products in the Health Sector**

- Overall market size, value and trends for washrooms in the health sector.
- Both current trends and future prospects are analysed.
- Key factors influencing the market, a reduction in capital spending, and a shift away from large new build projects towards refurbishment activity.
- Percentage shares by product sector and analysis of the product mix in 2011. This sector addresses the key washroom products including basins, brassware/taps, WCs, shower controls and panel systems.

- Product trends and services offered by suppliers to the education sector including improved levels of hygiene and safety with rimless WCs, no touch taps and WC devices and water saving features.
- Major suppliers of washroom products to the education sector and key suppliers within each product sector.

### **The Construction Market in Education and Health**

- Structure of the UK education and health sectors - levels of education including higher education. Primary healthcare market, secondary healthcare and private sector provision.
- Capital expenditure and construction output across the education and health sectors.
- Forecasts for construction output in the education and health sectors, capital spending programs and key contractors.

### **The Commercial Bathroom Market**

- Overall commercial bathroom market size, value and trends.
- Percentage shares by product sector and analysis of the changes in the product mix.
- Key end use sectors in the commercial bathroom market.

## **Report Summary**

The market for commercial bathroom products was worth £319m in 2011, a rise of 2% since 2010 while the value of washroom products in the education market was £49m in 2011, down from £54m in 2010. Having recently been one of the most buoyant sectors for construction, the combination of a new government, the 2010 Spending Review and austerity measures prompting a review of capital building have now significantly slowed down activity in the education sector.

Following on from the decision to halt Building Schools for the Future (BSF), capital spending will be reduced by 60% in real terms by 2014-15. Over the Spending Review period there will be a total of £15.8bn of capital spending. 2010 was a particularly strong year with the value of washroom products in the education sector achieving growth of 8% to a value of £54 million, predominantly supported by BSF projects. Key issues regarding washrooms in the education sector include safety, water conservation and vandal resistance, in addition to the number of students, age range and ease of accessibility.

The value of washroom products in the health market was £64m in 2011, down from £65m in 2010. Overall NHS spending will increase by around £10bn - a 0.4% increase in real terms over the course of the 2010 Spending Review period (2011-2015). However, this includes a 17% decrease in capital spending so many capital schemes are expected to suffer, with contracts likely to take much longer to reach financial close.

Forecasts for 2012 indicate that the commercial washrooms market is likely to achieve modest growth at 2%, supported by new build and refurbishment activity in the leisure and entertainment sectors and the build up to the Olympics. It is expected that commercial washroom spending in both the health and education end-use sectors will reduce by 7% over the next five years, with most of this reduction stimulated by capital expenditure cuts in the education sector.

The short-term outlook for education construction remains difficult, with the funding crisis in the higher and further education sectors likely to lead to deferral of improvements and extensions to existing facilities. The longer term outlook for primary and secondary education is also less clear under the coalition government, with the recent suspension of a number of projects under BSF, although a partial successor, the £2bn PFI schools programme, has now been announced. By 2016 the market value of washroom products in the education sector is forecast to be some £40m at MSP, which would represent a decrease of 18% compared to the estimated market size in 2011.

Lower levels of capital expenditure and financial uncertainty in the health sector is likely to mean a shift from new hospital builds to less-costly refurbishment schemes. The ending of the large-scale hospital development programme also means that the role for the private sector is likely to reduce in future years as PFI is replaced with programmes such as LIFT Express and

ProCure 21+ to build smaller based community projects. By 2016 the market value of washroom products in the health sector is forecast to be some £64m at MSP, which would represent a fairly static market from 2011.

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