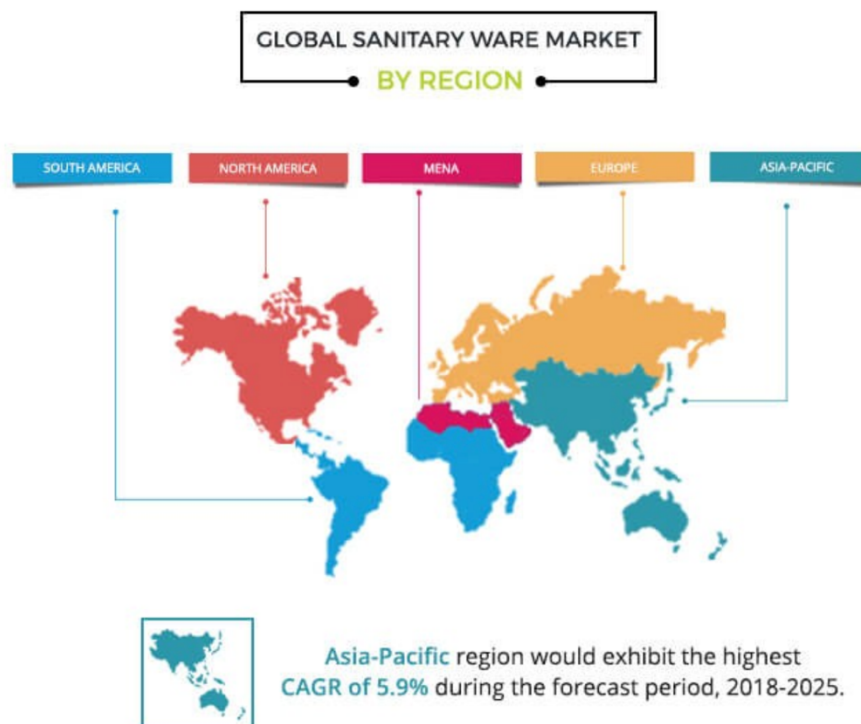


SANITARYWARE MARKET OVERVIEW

“The global sanitary ware market was valued at \$9,194 million in 2017 and is projected to reach \$13,616 million by 2025, registering a CAGR of 5.0% from 2018 to 2025.”

FACTORS AFFECTING THE GROWTH

- Rise in construction activities in developing countries
- Increase in concerns related to health & hygiene
- Healthy lifestyle
- Disposable income of consumers
- Surge in urbanization
- Growth in shift from unbranded products to branded products
- Strong replacement demand
- However, stringent government regulations are anticipated to hamper the sanitary ware market during the forecast period. Supportive government initiatives, such as Pradhan Mantri Awas Yojana (PMAY) and Swachh Bharat Mission for infrastructure development, both in urban and rural areas are expected to offer future growth opportunities in developing countries, such as India, to the sanitary ware market players.



The Asia-Pacific region has significantly contributed to the growth of the global sanitary ware market in 2017. Upsurge in demand for sanitary ware products, such as toilet sink/water closet and wash basin, coupled with the growth in the real estate sector is the key factor driving the demand for sanitary ware. In addition, rise in disposable incomes, increase in construction activities, surge in concerns over personal hygiene, and growth in the hospitality industry have been fueling the Asia-Pacific sanitary ware market.



The **TOILET SINKS/ WATER CLOSETS AND CISTERNS** segment dominates the sanitary ware market and is expected to retain its dominance throughout the forecast period

SANITARYWARE MARKET IN THE USA

“The U.S. sanitary ware market size was valued at \$4,168 million in 2017 and is expected to reach \$5,687.3 million by 2025, registering a CAGR of 4.0% from 2018 to 2025.”

Toilets are essential plumbing fixtures that are installed everywhere – in residences, businesses, and commercial facilities. Research conducted by [GMP Research on behalf of Plumbing Manufacturers International \(PMI\)](#) estimated the total number of toilets in the U.S. to be in **excess of 328 million**, including installed units for residential, light commercial, and commercial applications.

There are also toilets for specialized applications, such as for installation in aircraft, boats, and other vehicles such as buses & trains. Besides stationary toilets, there are markets for portable toilets as well to serve temporary or short-term needs such as construction sites, movie sets, campgrounds, marathons, or natural disaster zones.

According to industry market studies conducted by GMP Research, roughly **70% of the plumbing fixtures/fittings are sold as replacement items, while roughly 20% are sold into new residential construction and 10% are sold into commercial construction applications**

- A shower head is replaced every 12.5 years
- A lavatory faucet is replaced every 15 years
- A toilet is replaced every 30 years

MARKET PENETRATION-

Shower Heads-

According to the research, there are **245.4 million shower heads installed in the US homes**. During 2007-2014, our annual industry analysis indicates some 71.862 million shower heads were sold, of which 24% were sold into new residential construction and 76% were sold as replacements.

Lavatory Faucets-

According to the research, there are **410.3 million lavatory faucets installed in the US homes**. During 2007-2014 a total of 106.343 million lavatory faucets were sold, of which 23.8% were sold into new construction and 76.2% were sold as replacement. 98% of these faucets were WaterSense lavatory faucets (104.2 million lavatory faucets).

Toilets-

According to the research, there are **270.3 million toilets installed in US homes**. In addition, there are approximately 12.5 million residential toilets installed in the various light commercial applications (office buildings, hotel rooms, restaurants, nursing homes, retail/wholesale establishments, government buildings, gas stations and manufacturing). The total amount of residential toilets installed is therefore: 270.3 million residential toilets installed in homes + 12.5 million residential toilets installed in light commercial applications **282.8 million residential toilets installed**

KEY PLAYERS

The key players operating in the global sanitary ware market are-

- CERA Sanitaryware Limited,
- Corona, Geberit AG,
- HSIL Limited,
- Jaquar Group,
- Kohler Co.,
- LIXIL Group Corporation,
- LAUFEN Bathrooms AG,
- Lecico Egypt,
- Roca Sanitario, S.A.

SANITARYWARE MARKET IN INDIA

“India sanitary ware market was valued at USD 1,060 Million in 2020 and expected to reach USD 1,651.9 Million by 2027, at a CAGR of 6.7 % over the forecast period 2021 – 2027.”



IMPACT OF COVID-19 IN THE INDUSTRY

Production and operation, and infrastructural development activities have slowed down on account of the spreading of coronavirus, which is further anticipated to impact the demand for sanitary ware market. Due to covid-19 there is rise in demand for sanitary ware for better cleaning and maintaining proper hygiene across the surrounding. The rise in good sanitary products will drive the market in the upcoming year.

KEY PLAYERS

- Hindustan Sanitary Ware India Limited,
- Jaquar and Company Private Limited,
- Kohler India Corporation Private Limited,
- Roca Bathroom Products Private Limited,
- Duravit India Private Limited,
- H. & R. Johnson (India) TBK Limited,
- Cera Sanitaryware Limited,
- Somany Sanitary Ware Private Limited,
- Toto India Industries Private Limited,
- Neycer India Limited.

SOURCES-

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