

Report

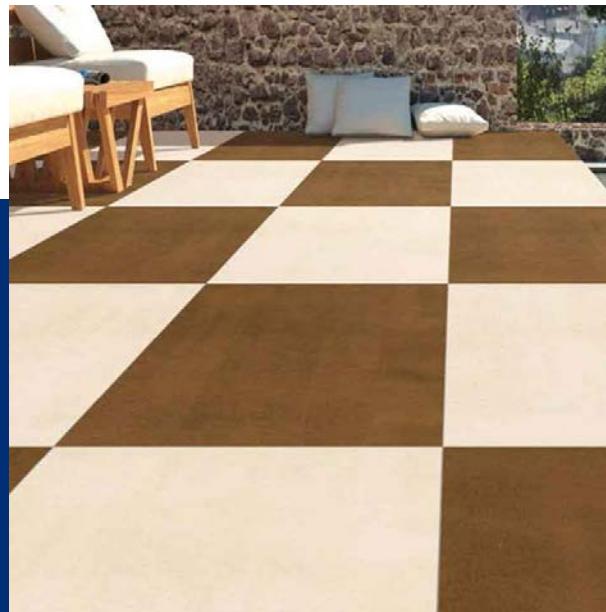
SAUDI ARABIA SANITARYWARE MARKET (2023-2028)

Domain: **NEO**

Base Year: **2022**

Study Period: **2019-2028**

Market Intelligence/Advisory



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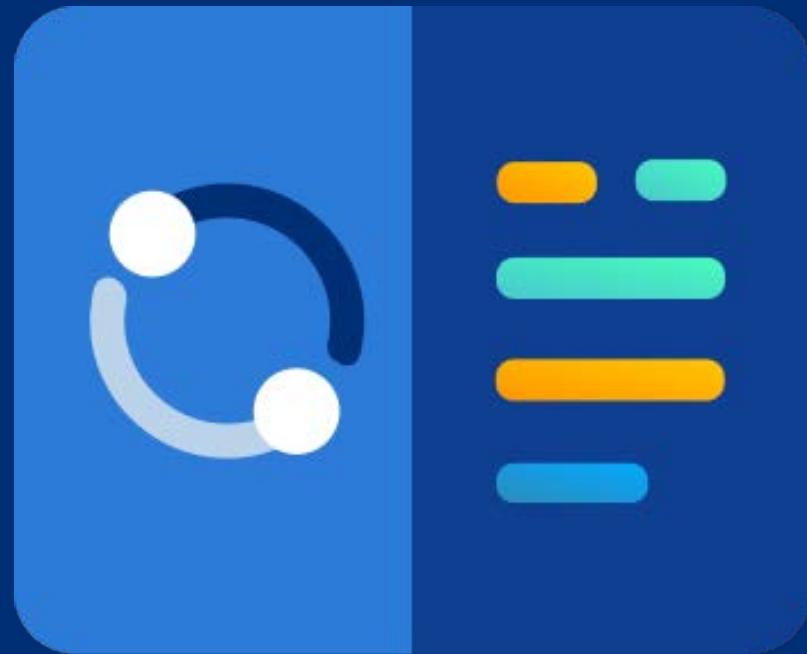
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1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study





1.1 STUDY ASSUMPTIONS AND MARKET DEFINITION

BASE CURRENCY

The base currency is considered as the United States Dollar (USD). Conversion of other currencies is based on the average exchange rates of the respective review period years. The exchange rate conversion for the forecast period is determined according to the base year's conversion rates.

BASE YEAR, REVIEW, AND FORECAST PERIOD

The base year is identified based on the availability of annual reports and secondary research information. The base year considered for this study is 2022. The review period considered for this study is from 2019 to 2022. The CAGR is for the forecast period 2022-2028.

FORECAST TERMS

Market-size estimations for the forecast years are in real terms. Nominal values are only considered. Inflation is not to be considered.

PRIMARY RESEARCH

The distribution of the primary interviews conducted is based on the regional share of the market and the presence of key players in each of the demographics pertinent in the market studied.

Note: The company revenues are mentioned as per the fiscal year in the HQ of the company, and currency conversion is as per the account closure date of the company.

MARKET DEFINITION

PRODUCT/SERVICE

Sanitaryware refers to sanitary appliances and sanitary installations found in toilets and bathrooms. It largely includes products such as toilet sinks, WCs, washbasins, cisterns, urinals, bidets, and pedestals.

GEOGRAPHY

Saudi Arabia





1.2 SCOPE OF THE STUDY

By Product

- Water Closet
- Washbasins
- Pedestals
- Cisterns
- Other Products

By Material

- Ceramic
- Metal
- Plastics
- Other Materials Types



1.2 SCOPE OF THE STUDY

By Application

Kitchen
Bathroom

By End Users

Residential
Commercial

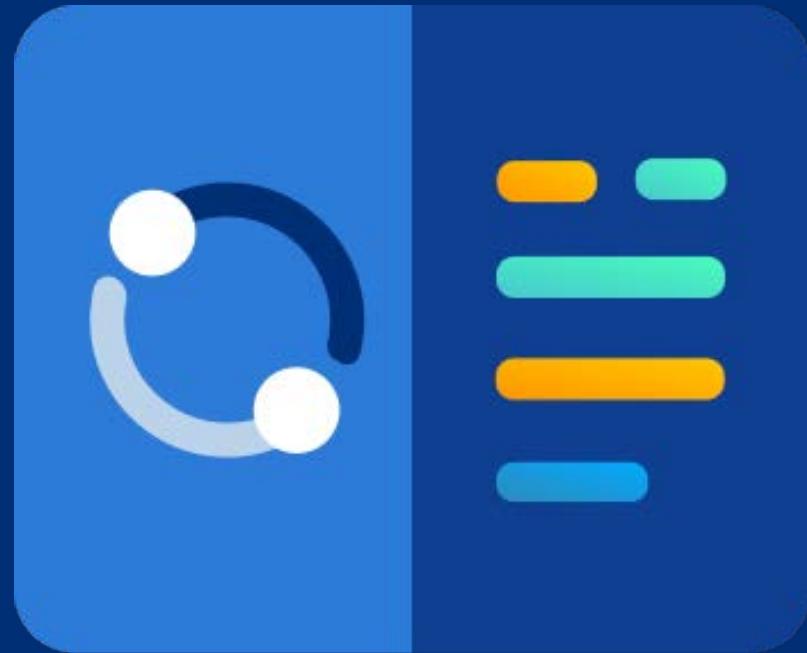
By Distribution Channel

Home Centers
Specialty Stores
Online Stores
Other Distribution Channels



2 RESEARCH METHODOLOGY

- 2.1 Research Framework
- 2.2 Secondary Research
- 2.3 Primary Research
- 2.4 Data Triangulation and Insight Generation





2.1 RESEARCH FRAMEWORK



- Mordor Intelligence (MI) advocates an appropriate mix of secondary and primary research to meet Client objectives.
- MI translates market insights (market dynamics, competition, varying consumer demands, and regulations) into actionable business insights.
- Following phases are practiced at Mordor for efficient delivery of various syndicated and consulting assignments.

STEP 1 SCOPING/ PROJECT INITIATION



Decipher Client Requirements/ Market to be studied



Tailor made research approach for customized reports



Effective use of Mordor's knowledge repository to gather relevant insights



Confirm the objectives of the assignment with Client

STEP 2 MARKET ANALYSIS



Extensive desk research to identify most relevant secondary information available



Contact Mordor's empaneled experts and identify industry experts across the market



Conduct primaries & surveys to gather qualitative and quantitative insights

STEP 3 PROJECT DELIVERY



Triangulate and analyze data to finalize on actionable business insights



Finalize report contents and establish a deliverable format



Report delivery with high quality market insights, competitive landscape etc., as per the proposed contents



2.2 SECONDARY RESEARCH

OBJECTIVE

Hypothesis and insights building; get factual data



Shortlisting market intelligence sources

Synthesis of published information



Data collection and aggregation

Further validated from expert interviews



Insight and hypothesis development

To reach out industry experts for interviews



Key contact list

Relevance and credibility of sources

A thorough synthesis of existing publications across the web to gather meaningful insights into the current situation of the market, technology developments, and any other market related information. The sources include, but are not limited to:

- Scientific papers, journals and publications.
- Trade information to understand imports, exports, and average traded price of the commodity, if available.
- Industry and government websites for blogs, magazines, and other publications.
- Conference proceedings and association publications.
- Investor presentations, technical brochures, annual reports, press releases, transcripts of key personnel interviews, and other strategic publications by several competitors in the market.
- Product information including technical specifications, approvals, patents etc.
- Public Sources Reports
- Paid sources (Questel Orbit, Dow Jones, Hoovers, industry specific subscriptions)



2.3 PRIMARY RESEARCH

OBJECTIVE

Gather first-hand insights into the market studied



Expert profile determination

Based on industry, role, experience, and location



Expert identification

Using Mordor's empaneled industry experts as well as new experts



Discussion guide

Semi-structured approach to probe and prioritize insights



Reach out and interviews

Targeted interviews to fill data gaps and validate insights

- At Mordor, we continuously strive to pool in industry experts across the value chain, to gather first-hand insights into the market studied. In addition to this knowledgeable industry veterans or retired experts, consultants and freelancers are a call away to collaborate with Mordor on any assignment which requires real-time industry insights.
- Also, we conduct paid interviews to gather qualitative insights and opinion of a group of individuals related to the industry.
- Primary research is used both to validate the data points obtained from secondary research and to fill the data gaps after secondary research.

MODES OF PRIMARY RESEARCH



Telephonic
Interviews



Email
Interviews



Chat
Interviews



Virtual
Council



Paid
Interviews



& Others

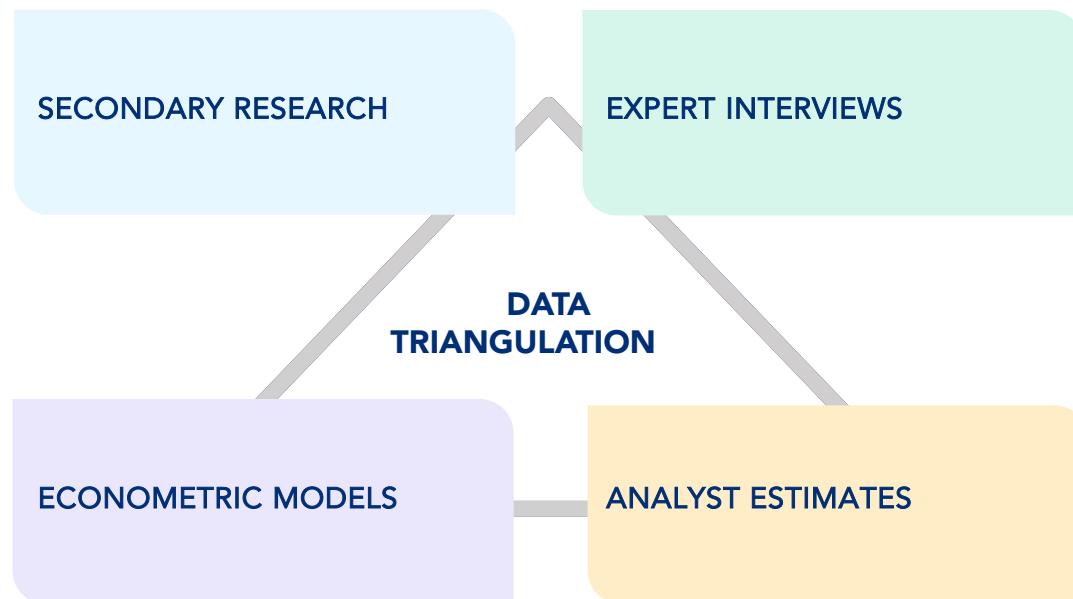
2.4 DATA TRIANGULATION AND INSIGHT GENERATION

OBJECTIVE

Logical checks and sanity of information

TRIANGULATION and TRANSFORMATION of INFORMATION EXTRACTED

Based on the factors identified which are endogenous and exogenous in nature collected during the secondary and primary phases, our in-house subject matter experts transform quantitative data extraction and use them for the inferential purpose.



Source: Mordor Intelligence

VALIDATION FOR MARKET ASSESSMENT ESTIMATES

- The market size estimations are carried out through 'Bottom-up' & 'Top-down' approaches.
- Our top-down and bottom-up approaches are integrated into our 'In-house Model sheets' which are used to generate the market estimates and growth rates (depending upon the historical trends of the respective markets along with the various factors like drivers, restraints and recent developments in the market) of the product segment in the respective country.

TOP-DOWN APPROACH

Macro view of a larger market filtered down to the target market

Expert interviews

VALIDATION POINT

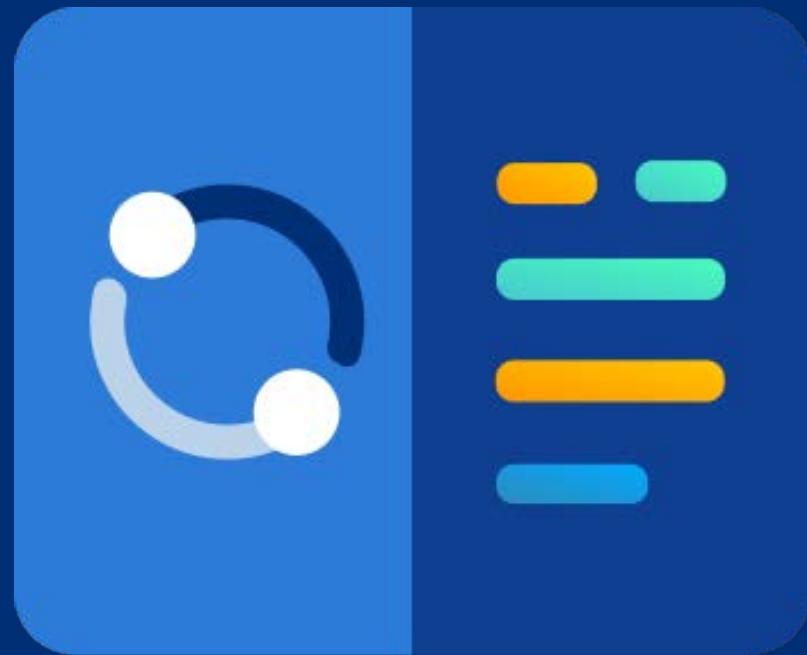
Expert interviews

BOTTOM-UP APPROACH

Revenue analysis leading players consumption centers of or



3 EXECUTIVE SUMMARY

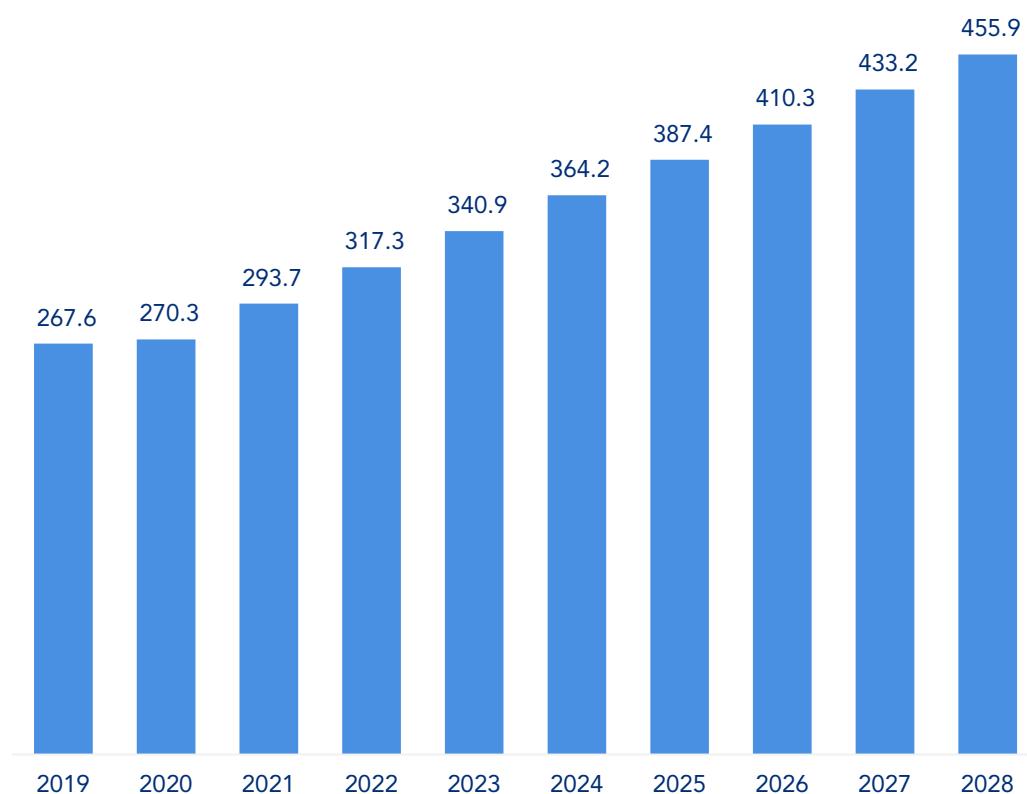


3 EXECUTIVE SUMMARY

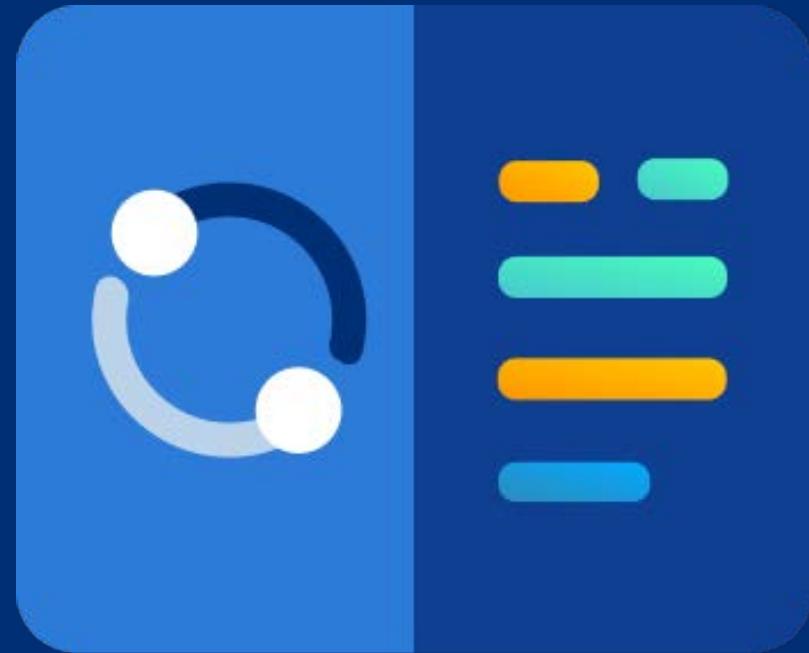
- The Saudi Arabia sanitaryware market (henceforth, referred to as the market studied) was valued at USD 317.3 million in 2022. It is expected to reach a value of USD 455.9 million by 2028, registering a CAGR of 6.2% during the forecast period (2022-2028).
- In recent years, the Saudi Arabian sanitaryware market has seen remarkable expansion. Saudi Arabia is emerging as a significant hub for residential and commercial real estate development in the Gulf Cooperation Council (GCC) area because of favorable government policies and spending. Another factor that is anticipated to drive the sanitaryware industry in the Kingdom is the rising rate of house ownership combined with the new, flexible regulations for foreign ownership of property, which will increase the homeownership of non-Saudi nationals.
- The Saudi Vision 2030, which promises to provide families with livable and affordable housing, has helped to explain the nation's noticeable growth in the housing market. The Ministry of Housing launched the Sakani program in 2017 to ensure housing for everyone. The need for sanitaryware goods is driven by government programs to promote affordable housing and rising demand from the commercial and institutional sectors, including hotels, businesses, schools, and hospitals.
- Increased urbanization, post-Covid awareness of hygiene and sanitation, rising disposable income, rising consumption expenditures, and a shift from locally produced unbranded sanitaryware to branded luxury goods are all factors that have a positive impact on the development of the Saudi Arabian sanitaryware market.
- The present economic condition where the rising interest rates and inflation is increasing housing costs in the Kingdom. Also, the young Saudi population is becoming more mobile throughout the Kingdom, traveling from city to city to take advantage of job prospects as a result the interest for young Saudis to become homeowners is decreasing. This lower interest for home acquisition can be potential restraint for the sanitaryware market.

SANITARYWARE MARKET, VALUE IN USD MILLION, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.2%



4 MARKET INSIGHTS AND DYNAMICS





4 MARKET INSIGHTS AND DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Challenges/Restraints
- 4.4 Market Opportunities
- 4.5 Industry Value Chain Analysis
- 4.6 Porter's Five Forces Analysis
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- 4.9 Impact of COVID-19 on the Market





4.1 MARKET OVERVIEW

- The term "sanitaryware" describes toiletries and bathroom equipment. They are the items that plumbers fix so that the pipes are connected to them, and they are typically fixed in a permanent location. Toilets, urinals, sinks, washbasins, bathtubs, bidets, and other items are a few examples.
- Because they are smooth, non-corrosive, non-absorbent, and anti-microbial, sanitaryware keeps the toilet and bathroom clean and hygiene-focused. The market for sanitaryware in Saudi Arabia is expanding more quickly due to people's growing awareness of cleanliness and hygiene. Additionally, it is anticipated that the creation of new products and the evolution of older ones to satisfy the needs of luxury and comfort would increase the usefulness of sanitaryware products.
- Due to growing urbanization, building restorations and upgrades, significant investments in infrastructure and industrial sectors, and an increase in construction activities in Saudi Arabia, the sanitaryware industry is predicted to experience rapid expansion. The landscape of sanitaryware is changing, and new construction is expected to develop at the fastest rate during the forecast period.
- In terms of sanitaryware, Saudi Arabia is predominantly an import-oriented nation. Saudi Arabia has a significant local demand for sanitaryware items as a result of the region's rapid expansion of the residential construction and hotel industries.
- Saudi Arabia's construction and real estate industries have grown quickly in recent years. As part of Saudi Arabia's efforts to diversify its oil-based economy, several publicly and privately funded infrastructure projects have been launched, which has further boosted the country's construction industry. The demand for sanitaryware is anticipated to expand throughout the anticipated period because of the development of commercial and residential housing.
- People spend a lot of money on their bathrooms to express their style, especially as household consumption expenditures climb across the country. In Saudi Arabia, modern, smart bathrooms with cutting-edge sanitaryware are common.
- The sanitaryware market in Saudi Arabia has witnessed tremendous growth in the past few years. Saudi Arabia is the main hub for sanitary ware market players in the GCC region. Increasing government initiatives to support affordable housing and rising demand from the commercial and institutional sectors such as hotels, offices, schools, and colleges are also augmenting demand for sanitary ware products hugely.
- Due to increased housing demand from the native and immigrant populations, the Saudi Arabian market for sanitary ware goods is anticipated to continue seeing significant growth. Additionally, it is anticipated that rising consumer spending power would further fuel market demand development.
- The rising domestic as well as the increasing population, high urbanization, increasing nuclear family trend, etc., have led to a higher demand for houses than the earlier times.

Source: Mordor Intelligence





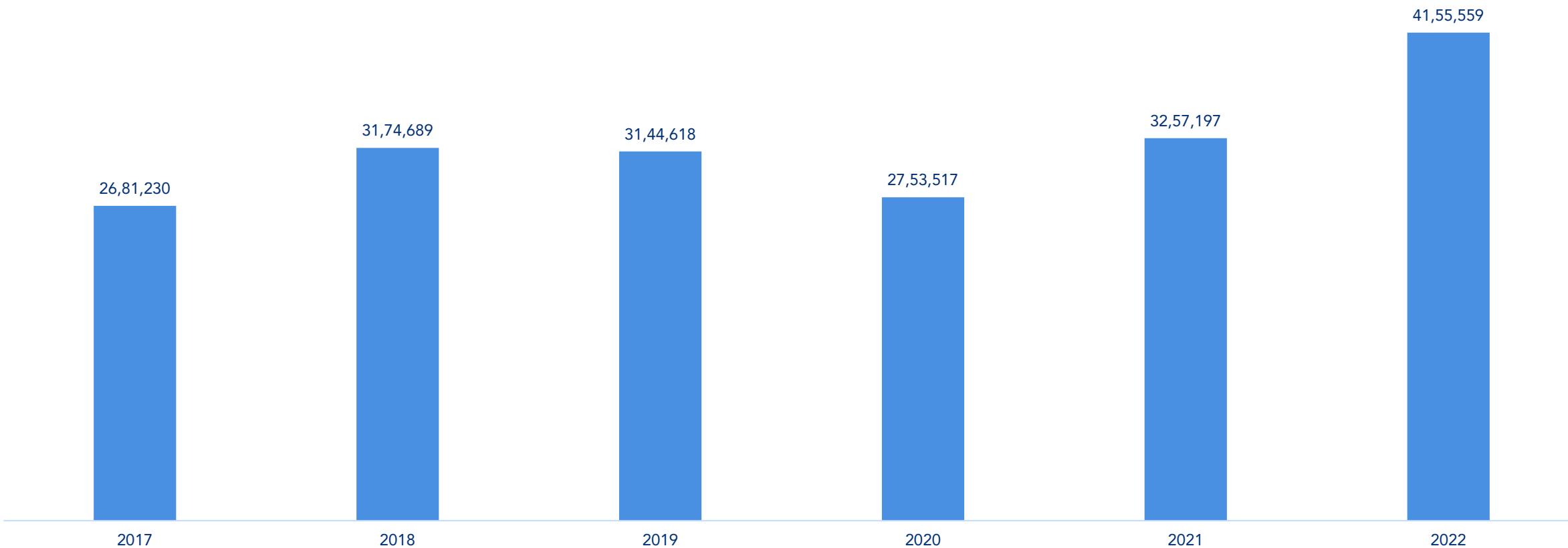
4.1 MARKET OVERVIEW

- The need for sanitaryware items in Saudi Arabia has been fueled by the country's hospitality initiatives, especially the hotels in Mecca and Medina. The majority of the nation's sanitaryware items are imported, and it is among the top 10 countries in the world for the importation of ceramic sanitaryware, accounting for a sizeable share of all sanitaryware imports worldwide.
- Manufacturers and suppliers of sanitary ware products in Saudi Arabia are taking steps to increase their capacity, encouraged by the country's ongoing expansion in the construction sector resulting in demand for the products. The growing demand-supply gap created by the rise in domestic consumption of sanitary ware products is allowing foreign companies to enter the market.
- Due to their expanding distribution network, which includes exclusive locations, businesses like RAK Ceramics and Saudi Ceramics are anticipated to grow quickly. Companies are working with top retail chains to boost their product availability in light of the high distributor margins.
- Due to the growing need for housing among the native and immigrant populations, along with the favorable government initiatives for residential housing development, the Saudi Arabian market for sanitary ware goods is anticipated to continue seeing healthy growth. Additionally, it is anticipated that rising consumer spending power will further fuel demand growth in the market throughout the anticipated period.
- Due to significant part to the presence of various industrial and institutional centers in these regions, the Central and Western regions of Saudi Arabia generate the majority of the country's sanitary ware market's revenues in the Kingdom.
- With the number of mega projects being constructed in the Kingdom, the GDP for construction activity has been increasing for the last half-decade. The GDP by construction activity was SAR 169,990 million for 2021 and increased to SAR 186,791 million in 2022. The rise in construction is directly related to the increasing use of sanitaryware products as sanitaryware products are essential in any type of construction either residential or commercial.
- Saudi Arabia is one of the main hubs for sanitary ware market players in the GCC (Gulf Cooperation Council) region. The sanitary ware market of Saudi Arabia is more promising than the rest of the neighboring nations as various projects are under process in Saudi Arabia.
- With ongoing investment and technological advancements, the country is investing in diverse projects. Such large-scale initiatives aim to provide access to housing opportunities for lower-income groups, create new employment opportunities, and further diversify the economy. Saudi Arabia plans to invest approximately USD 1 trillion in the country's non-hydrocarbon sector by 2030. Some of the key projects include Neom, the Red Sea Project, Qiddiya Entertainment City, King Abdullah Financial District, and Amaala, to name a few.
- These substantial infrastructure investments are the foundation on which the Kingdom is envisioning its new future. Along with these 'giga-projects', Saudi Arabia invests in many social and urban development projects, such as the Sakani housing program, further illustrating the country's commitment to driving development using smart tech. The government support, along with infrastructure investments in the country, rises the demand for sanitaryware products during the forecast period.



4.1 MARKET OVERVIEW

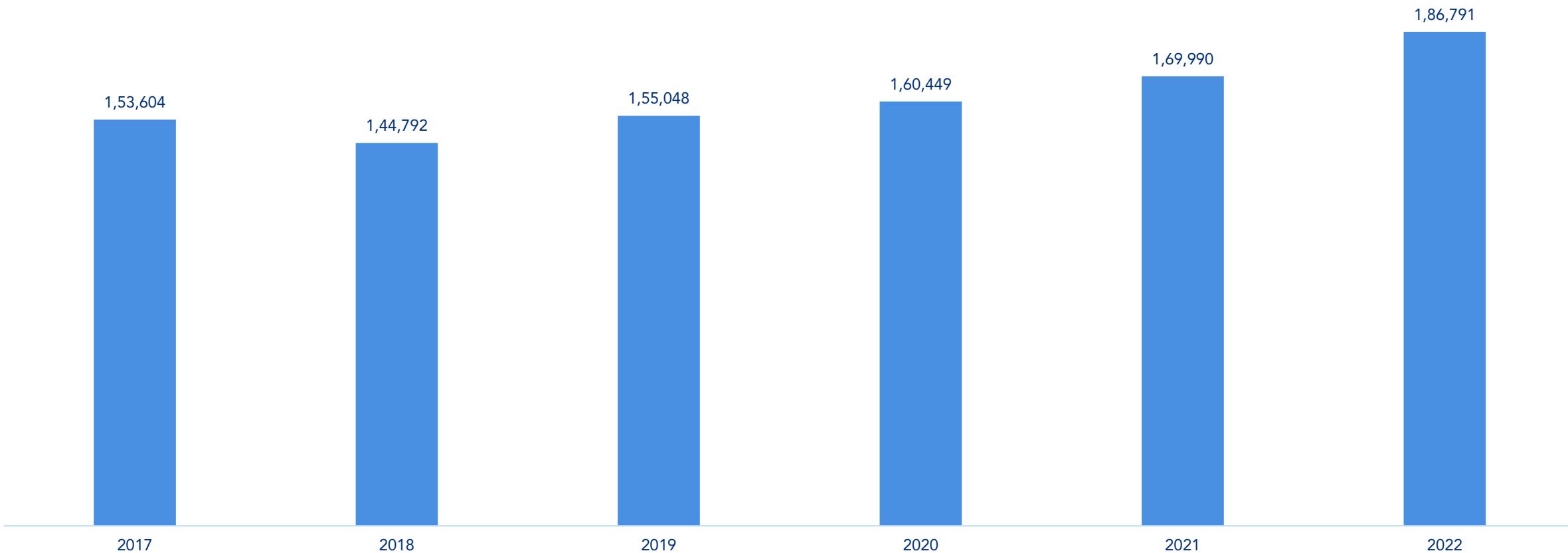
GROSS DOMESTIC PRODUCT IN SAUDI ARABIA IN SAR MILLION, 2017-2022



Source: General Authority for Statistics

4.1 MARKET OVERVIEW

GROSS DOMESTIC PRODUCT BY KIND OF ECONOMIC ACTIVITY IN SAUDI ARABIA, CONSTRUCTION, IN SAR MILLION, FOR YEARS 2017-2022



Source: General Authority for Statistics



4.1 MARKET OVERVIEW

Top 10 exporters of baths, shower baths, sinks, washbasins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics, Saudi Arabia, Import Value in USD Thousand, 2017-2021

Exporters	2017	2018	2019	2020	2021
World	52,432	43,084	53,112	60,505	69,083
Germany	9,283	9,625	13,107	23,412	33,374
China	10,570	8,200	13,451	17,805	18,964
Spain	3,062	2,625	2,926	3,253	4,720
United Kingdom	3,161	4,529	4,908	3,490	2,096
Italy	3,886	2,052	2,451	2,124	1,771
Bahrain	1,378	1,456	1,341	1,427	1,493
United Arab Emirates	5,672	5,679	5,665	2,040	1,400
Egypt	1,918	1,948	1,829	1,224	1,211
Thailand	542	677	935	1,004	988
United States	7,706	1,804	1,326	1,097	761

Source: TradeMap





4.1 MARKET OVERVIEW

Top 10 Importers Of Baths, Shower Baths, Sinks, Washbasins, Bidets, Lavatory Pans, Seats And Covers, Flushing Cisterns and Similar Sanitary Ware, Of Plastics, Saudi Arabia, Export Value In USD Thousand, 2017-2021

Importers	2017	2018	2019	2020	2021
World	983	691	192	131	533
Kuwait	0	34	30	67	290
Yemen	0	4	37	3	95
Germany	325	0	0	0	47
Bahrain	0	62	44	32	40
Jordan	41	148	73	8	33
Oman	0	5	0	0	16
United Arab Emirates	98	197	7	0	12
Area Nes	358	0	0	0	- 
China	160	0	0	0	-
Djibouti	0	8	0	0	-

Source: Trade Map





4.1 MARKET OVERVIEW

Top 10 exporters of Ceramic Sinks, Washbasins, Washbasin Pedestals, Baths, Bidets, Water Closet Pans, Saudi Arabia, Import Value in USD Thousand, 2017-2021

Exporters	2017	2018	2019	2020	2021
World	63,643	47,849	58,194	69,487	60,297
China	29,161	21,529	31,835	43,085	34,622
India	7,102	5,051	6,588	5,794	9,477
United Arab Emirates	1,822	210	1,804	3,571	2,825
Egypt	3,762	3,588	1,748	3,741	2,817
Portugal	450	393	1,647	757	1,941
Italy	3,912	1,892	891	1,501	1,724
Thailand	3,009	2,794	1,737	2,105	1,595
Germany	2,023	1,362	2,235	1,285	1,224
Spain	3,401	2,834	1,780	1,522	765
Czech Republic	422	530	324	62	624

Source: TradeMap





4.1 MARKET OVERVIEW

Top 10 Importers of Ceramic Sinks, Washbasins, Washbasin Pedestals, Baths, Bidets, Water Closet Pans, Saudi Arabia, Export Value in USD Thousand, 2017-2021

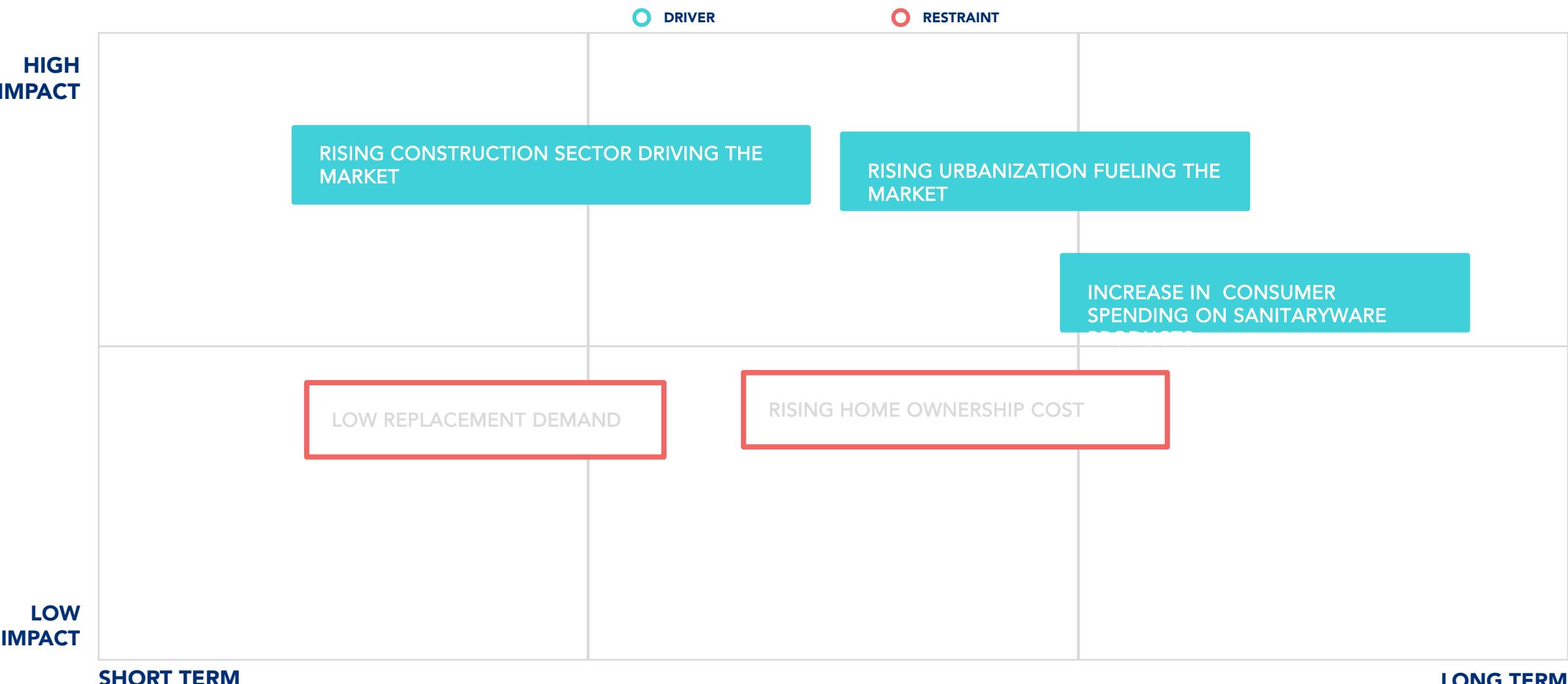
Importers	2017	2018	2019	2020	2021
World	5,164	9,030	4,149	1,955	4,932
Kuwait	450	3,155	1,114	1,290	4,425
Yemen	179	467	417	92	198
United Arab Emirates	539	1,612	1,795	170	118
Jordan	1,253	740	506	289	108
Bahrain	0	1,006	0	0	44
Lebanon	622	478	20	23	27
Italy	345	122	12	46	9
Senegal	0	0	0	0	5
Area Nes	530	0	0	0	-
Djibouti	0	36	0	0	-

Source: Trade Map





4.2 MARKET DRIVERS



Source: Mordor Intelligence



4.2 MARKET DRIVERS



RISING DEMAND OF SANITARYWARE PRODUCTS DUE TO GROWTH IN THE CONSTRUCTION SECTOR

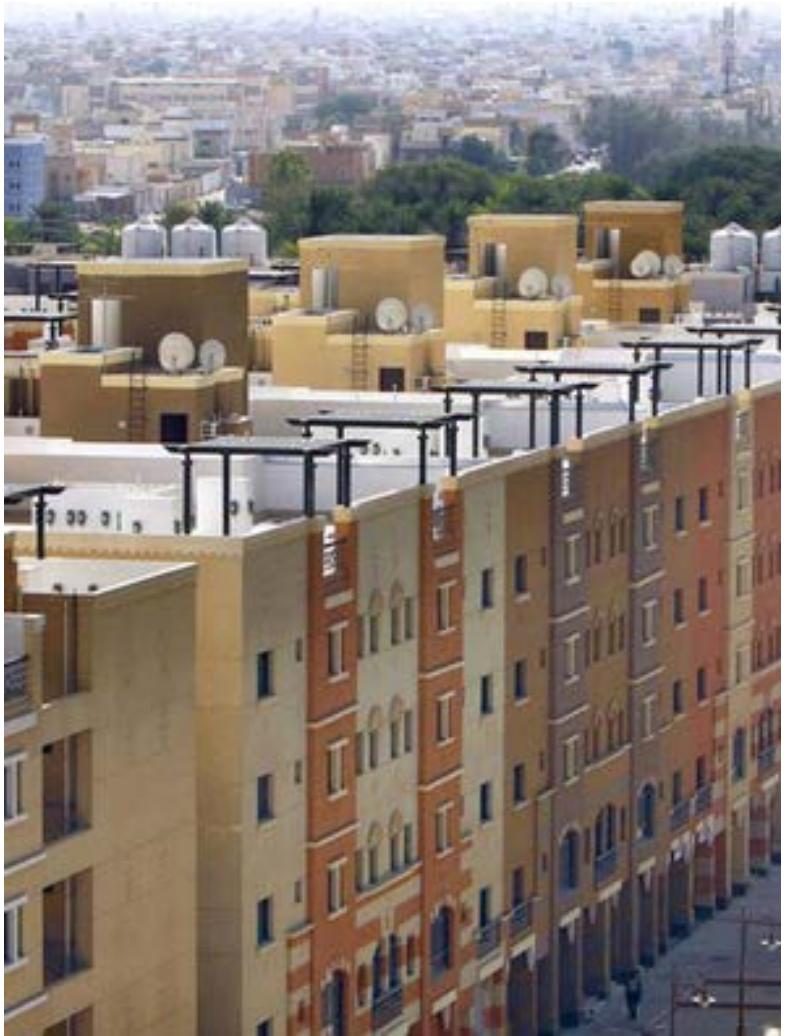
- Saudi Arabia, the region's largest economy, began ramping up tendering on its Public Investment Fund (PIF) Giga projects program, particularly on the Neom, Red Sea, Diriyah Gate, and Qiddiya developments, as it seeks to turn its ambitious tourism and real estate plans into action on the ground.
- Since June 2021, more than a dozen major contract packages have been released on Neom alone as the estimated USD 500 billion development enters full-scale construction.
- Saudi Arabia has begun new projects to build up to 150,000 homes across the country in an effort to ensure that at least two-thirds of the country's inhabitants possess a home. It is also anticipated to fuel Kingdom sanitaryware business growth.
- The newly constructed homes, which come in houses, villas, and flats, are spread over seven important cities. These include Saudi Arabia's capital Riyadh, Jeddah on the western shore of the Red Sea, Medina in the country's west, Dammam in the east, and the southern area.
- Families in Saudi Arabia who qualify for the government housing program can access these residential housing units. In 2021, 225,000 households benefited from the project. In 2022, the program helped more than 180,000 families.
- The value of contracts signed during Q2-2022 in Saudi Arabia, the largest project market in the GCC, increased the most year over year, from USD 9.3 billion in Q2-2021 to USD 16.5 billion in Q2-2022. USD 500 billion in Neom project contracts were awarded, increasing the Kingdom's project awards for the quarter. According to MEED, the Neom project was the source of three of the ten largest contracts awarded in the Kingdom during Q2-2022.

Source: Mordor Intelligence





4.2 MARKET DRIVERS



RESIDENTIAL CONSTRUCTION FAVORED BY GOVERNMENT INITIATIVES DRIVING THE MARKET

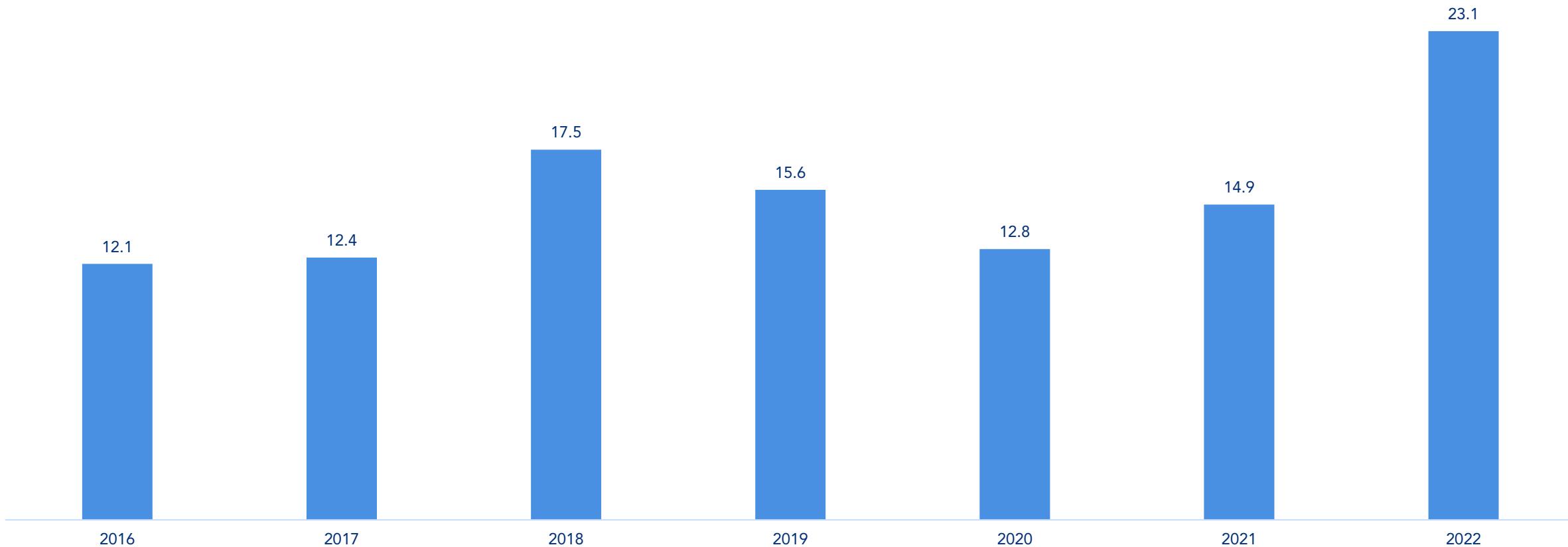
- Saudi Arabia has been implementing massive structural reforms to diversify its economy away from oil and toward non-oil sectors as part of its long-term strategic goals, such as Saudi Vision 2030. The development of the construction sector is one of the key objectives of this strategy, which is backed by the beginning of multiple megaprojects that should boost local demand for building supplies. To accommodate the anticipated growth in demand, major construction material producers, such as sanitaryware companies, have planned to expand their production capacities and launch new products. Since demand projections are strong, it is expected that ongoing planned capacity increases will benefit local ceramic industries in the near to medium term.
- The Saudi Vision 2030, which promises to provide families with livable and affordable housing, has helped to explain the nation's noticeable growth in the housing market. The Ministry of Housing launched the Sakani program in 2017 with the goal of ensuring housing for everyone.
- The Saudi Arabian housing ministry revealed a proposal to develop over 19,500 residential units for its inhabitants under the "Sakani" house construction program in order to meet its goal of raising homeownership among Saudi Arabians to 60% by 2023 and 70% by 2030.
- The Ministry of Housing and Real Estate Development Fund (REDF) started "Sakani II" with the goal of completing 300,000 residential units across the Kingdom in 2019. To improve openness and accountability in the residential real estate sector, the Kingdom has even implemented a rental pricing index.

Source: Mordor Intelligence



4.2 MARKET DRIVERS

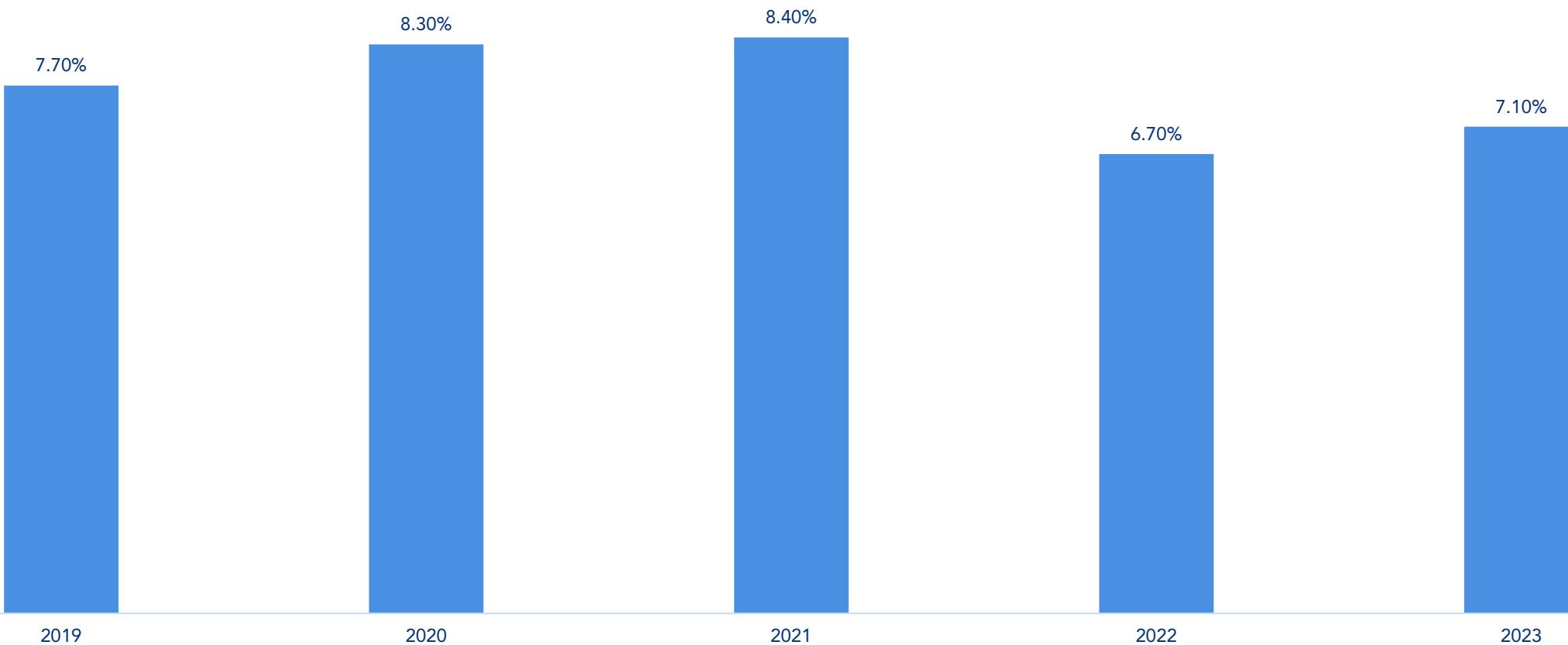
VALUE OF CONSTRUCTION CONTRACT AWARDS IN SAUDI ARABIA, IN USD BILLION, FROM 2016-2022



Source: MEED

4.2 MARKET DRIVERS

PROJECTED GROWTH OF THE CONSTRUCTION SECTOR IN SAUDI ARABIA FROM 2019 TO 2023



Source: NOOZZ



4.2 MARKET DRIVERS

RISING URBANIZATION AND HOME OWNERSHIP FUELING THE MARKET



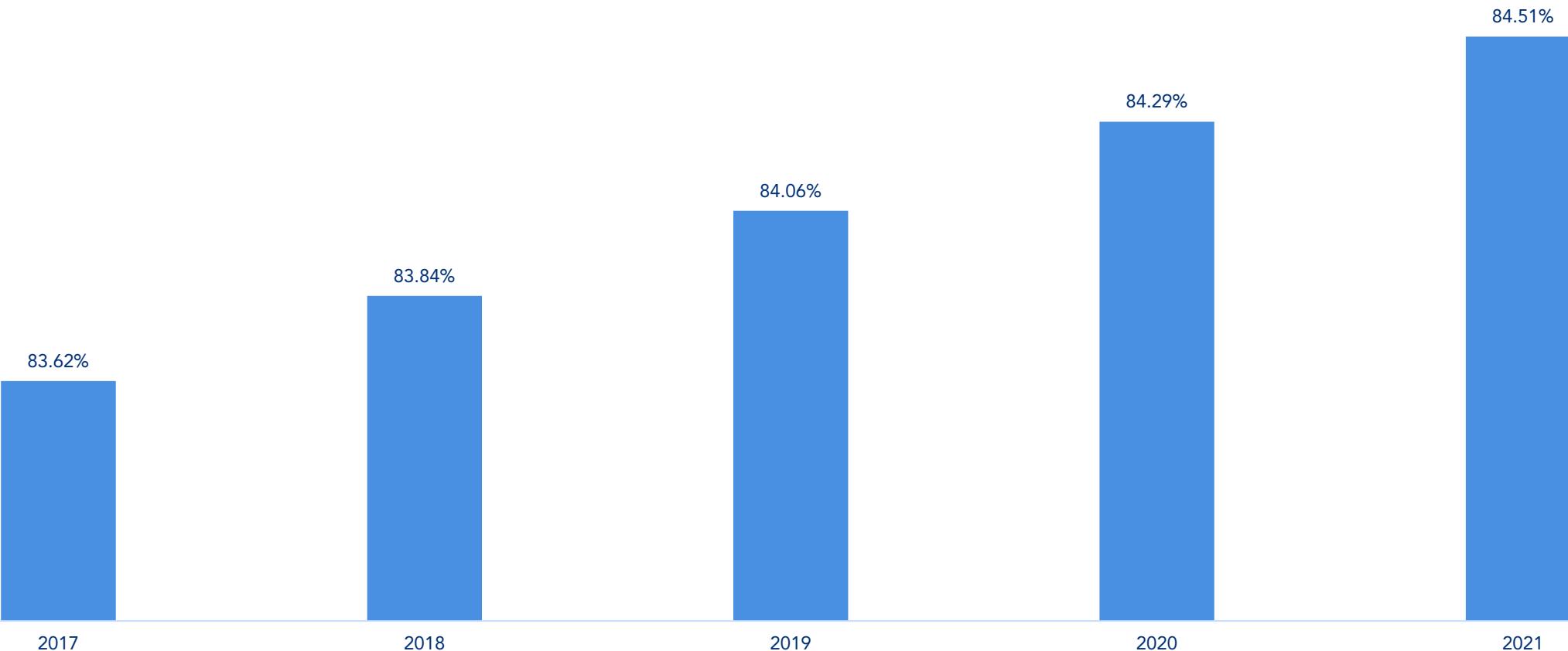
- The government initiatives to provide affordable housing in the most prominent cities of the Kingdom, along with rising urbanization, are driving the sanitaryware market.
- Around 84.51% of Saudi Arabia's population lived in urban areas in 2021. In the studied period, the share's value peaked in 2021.
- The government is continually modernizing the housing industry and enhancing home access and ownership for Saudi families through programs including regulation harmonization and access to finance.
- Saudi citizens made up more than 1.6 million of those on waiting lists for government housing programs in 2017, which prompted the creation of the "Housing Program in 2018" to enhance Saudi families' access to acceptable homes. With the help of this program, Saudi Arabia reinforced its commitment to tackling issues like population increase, fast urbanization, a lack of affordable housing, and an unregulated self-build industry.
- The Saudi Central Bank, also known as SAMA, has played a significant role in the growth of the housing sector by lowering the minimum down payment for property purchases from 30% to 5% of the purchase price and expanding the number of banks that offer home loans.
- The Kingdom has continued to strengthen the private sector's involvement, especially in the creation of high-quality, affordable, secure, and conveniently situated housing. This is in addition to boosting access to financing.
- There are several important government programs for affordable housing, including the Mulak scheme, Shrakat, and Sakani. With the help of these initiatives, the public and private sectors will work together more effectively to satisfy the housing needs of the population with affordable housing options and solutions. Saudi homebuyers can also apply for their first home online.
- Rising urbanization and affordable housing increase homeownership rates. In Saudi Arabia, growing home ownership and urbanization have a direct impact on the sanitaryware market due to the importance of plumbing and sanitaryware products in residential housing.

Source: Mordor Intelligence



4.2 MARKET DRIVERS

SHARE OF THE URBAN POPULATION IN SAUDI ARABIA, IN PERCENTAGE, FROM 2017 TO 2021



Source: World Bank

4.2 MARKET DRIVERS

INCREASING CONSUMER SPENDING ON SANITARYWARE PRODUCTS

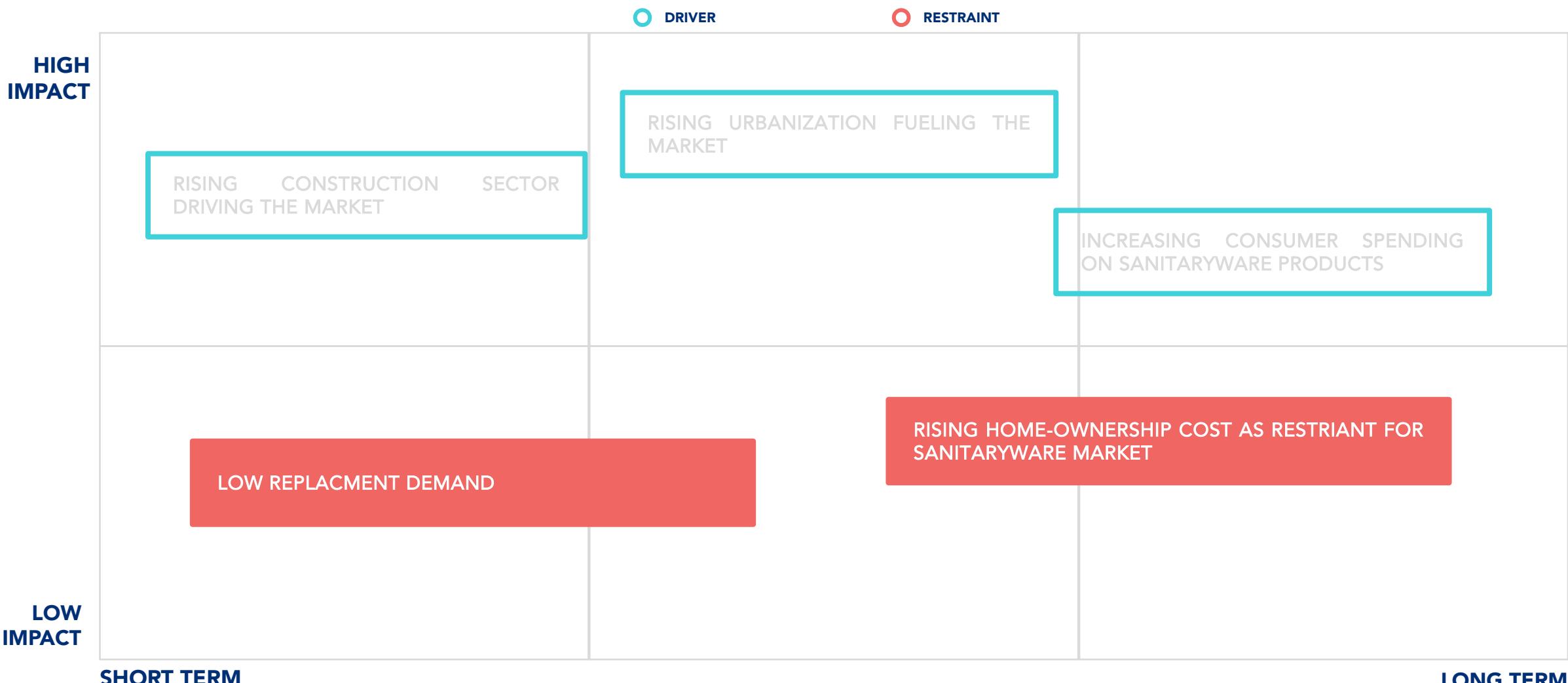
- People are becoming more conscious of cleanliness and hygiene as a result of the pandemic. As a result, sanitaryware use and spending are rising globally, including in Saudi Arabia.
- Urban Saudi Arabian households are transforming their bathrooms into experimental wellness spaces. The amount of time and money spent on bathroom interior design and accessories has grown significantly over time.
- People are spending more money on sanitaryware because it has luxurious, elegant, and practical qualities. Since the bathroom is a continuation of the living spaces and may also display the owner's style, these qualities are becoming more and more important to consumers.
- In the past, bathrooms were used for practical purposes, but today they are also employed as experience zones. Even homes with a small number of bathrooms are making effective use of their available space by transforming them into wellness areas. Spending on high-end, luxurious sanitaryware products has also gone up.
- Additionally, top-tier luxury sanitaryware products across the world have been drawn to Saudi Arabia by its rising per capita income. Because they have more money to spend and a higher standard of living, consumers buy high-end sanitaryware products.
- Technology is being used more and more in living and bathroom spaces. Consumers look for solutions to maintain their homes "in style" by mixing luxury and technology. The industry offers a variety of devices, from integrated toilets to smart bathtubs, to transform bathrooms into health places.



Source: Mordor Intelligence



4.3 MARKET RESTRAINTS



Source: Mordor Intelligence



4.3 MARKET CHALLENGES/RESTRAINTS



LOW REPLACEMENT DEMAND

- Major restraint associated with sanitaryware products is the low replacement demand. They include permanent fixtures such as toilets, bathtubs, and urinals, which can not be replaced without professional plumbing help.
- In most of the market, sanitaryware products are replaced only when they cannot provide functionality due to wear and tear. The replacement of sanitaryware is seldom done, even if there is the availability of updated products.
- The replacement demand for durable goods depends on factors such as obsolescence, physical deterioration, and the expectation of technological change. For sanitaryware products, physical deterioration is the main factor in sanitaryware replacement.
- Replacement due to the expectation of technological change is very low for sanitaryware products for the developing market. People do not consider replacing sanitaryware until they lose its functional attributes.
- Although manufacturers are developing sanitaryware products with cutting-edge attributes, low and middle-income and a large chunk of non-Saudi people in rental houses are still slow to embrace the change due to the high price associated with replacing sanitaryware products.
- Similarly, with the growing urbanization, bathroom sizes are constantly decreasing in major cities worldwide. Decreasing bathroom sizes in an urban area can accommodate only basic sanitaryware products; even though people are transforming their bathrooms into wellness spaces, bathrooms in urban areas are big enough only to accommodate basic sanitaryware products, which poses one of the challenges for the sanitaryware market around the globe, including Saudi Arabia.



4.3 MARKET CHALLENGES/RESTRAINTS



LOW HOME BUYING INTEREST IN RECENT TIMES

- In Saudi Arabia, interest in home ownership has decreased from 84% to 40% in one year as a result of rising housing costs and shifting market dynamics.
- According to Knight Frank, a top independent real estate consultancy in Saudi Arabia, residential real estate activity has significantly decreased. This decline has been attributed to several factors, including an increase in young Saudis moving around. In addition, buyers are delaying larger down payments on their homes.
- By the end of the first quarter of 2023, the number of residential property transactions in the Kingdom had decreased by nearly 57% in Riyadh and 67% in Jeddah annually.
- In Riyadh, the 50% increase in apartment values and the 40% increase in villa prices between 2022 and 2023 will surely hurt buyer demand as households are compelled to hold off while saving ever-larger down payments.
- Domestic migration is an emerging, yet important, issue to consider. Young Saudis are becoming more mobile throughout the Kingdom, traveling from city to city to benefit from job prospects (56% of the population is under 35). Most of this group is not interested in home ownership.
- Ownership costs have increased due to rising mortgage rates, and interest-free loan subsidies have significantly decreased, especially for lower-income cohorts. These factors have also decreased home purchase enthusiasm in Saudi Arabia.
- The residential housing industry is one of the primary demand generators for sanitaryware. The housing industry supported by various government initiatives grew rapidly in the last couple of years, which fueled the sanitaryware market. However, the housing market has declined in the current year. Although the decline may be cyclical, the further decline in the housing market may pose greater restraints on the sanitaryware market.



4.4 MARKET OPPORTUNITIES

RISE IN SMART HOMES AND BATHROOM OFFER OPPORTUNITIES FOR SMART SANITARYWARE SOLUTIONS

- Smart bathroom connects with smart home devices such as smartphones that provide users with complete control and customization of the bathroom experience. With the smart bathroom, users will be able to use features such as personalized temperature control, bath fill control option, etc.
- Convenience, security, and savings are major benefits associated with smart bathrooms.
- Integration of AI and IoT devices is increasing in smart bathroom implementation. This is due to the integration of inter-connected bathrooms allowing for total control and working with the user's home to provide a seamless experience.
- The increasing trend of smart homes has also driven the demand for smart plumbing fixtures. These fixtures are not only embedded with the latest technologies, such as Bluetooth, heated seating, air drying, internet connectivity, and others. They also implement water-saving technologies which ensure the efficient use of water.
- In addition, smart leak detection systems continuously monitor water usage in homes and notify users by email, text, or push notification of unusual activities. This also enables the user to set limits on water usage and save money on water bills.
- The adoption of smart homes is on the rise in Saudi Arabia. As technology infrastructure in Kingdom increases, the smart home market has grown by double digits. Utility savings have been the major reason for smart home adoption as it reduces energy consumption.
- Young people in the workforce who are open to technology are also increasingly seeking a smart house and a smart bathroom. The rate of smartphone usage in the area is another indicator of this readiness to absorb technology.
- The substantial portion of the Saudi population is what is driving the desire for smart technologies. Younger working-class people are adept at technology and like smart devices' convenience.
- Governments around the Gulf Cooperation Council (GCC), including Saudi Arabia, are initiating initiatives to build smart cities that make use of energy-efficient infrastructure, the capacity for big data collection, and strategies to increase the efficiency of the smart city system. Smart homes will be crucial to these initiatives. With a focus on smart households, there will be more options for high-end sanitaryware items for smart bathrooms.



4.4 MARKET OPPORTUNITIES

INCREASING AWARENESS TOWARD HEALTH AND HYGIENE POST-COVID

- The COVID-19 has significantly raised people's awareness of health and cleanliness. More people are concerned about sanitation. The Saudi government also implemented a number of cleanliness and hygiene regulations to stop the COVID-19 virus from spreading.
- The awareness raised prospects for the sanitaryware industry by promoting healthy behaviors like frequent hand washing, good sanitation, and safe defecation.
- Panic and confusion came from the COVID-19 pandemic's unexpected emergence. In the early stages of the outbreak, there was not enough information available concerning the illness, therefore maintaining personal hygiene and ongoing environmental sanitation were vital. Even after the pandemic, these practices have persisted as the norm which provides a significant opportunity for the sanitaryware market.
- Along with the preventive measure for COVID-19, people also become aware that improved sanitation help to prevent many other diseases. This has created market opportunities for the sanitaryware market.

DEMAND FOR SUSTAINABLE SANITARYWARE PRODUCTS

- In a home, the bathroom is where the most water is wasted. The use of fixtures and goods that are environmentally responsible and aid in water conservation is urgently needed in light of the current drought and rising temperatures. Demand for energy and water-efficient sanitaryware items has increased with consumers' increased environmental consciousness.
- One of the top ceramics companies in the world, RAK Ceramics PJSC, has announced a USD 14 million investment in its sanitaryware manufacturing line, modernizing the facility with the most cutting-edge technology kilns and improving the company's sanitaryware operating model sustainably.
- A sustainable product is not only aesthetically beautiful but also environmentally friendly. When it comes to such environmentally friendly products, consumers are demanding creative and long-lasting faucets and sanitary products that are water-saving and germ-resistant.

Source: Mordor Intelligence



4.4 MARKET OPPORTUNITIES

SAUDI ARABIA FINALIZING FOREIGN OWNERSHIP OF PROPERTY

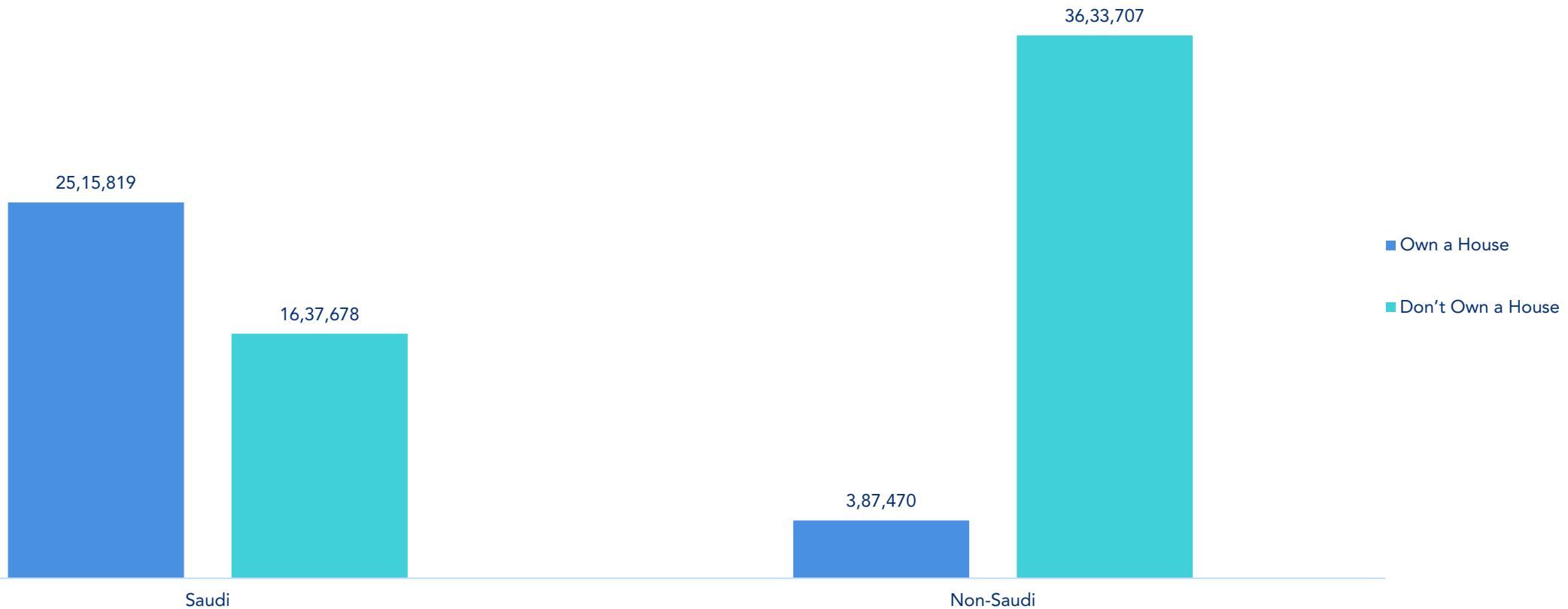
- A new rule that permits non-Saudi citizens to acquire property in the Kingdom is expected to be adopted by Saudi Arabia. The new law, which is more expansive and inclusive than the existing system for property ownership and is currently in its final phases, allows foreigners to purchase real estate in the Kingdom.
- In accordance with certain restrictions, the new law permits non-Saudis to possess various forms of real estate, including commercial, residential, and agricultural properties. According to the law's initial interpretation, foreigners can invest in any real estate of the Kingdom including Makkah and Madinah.
- To diversify its economy by 2030, Saudi Arabia is working on real estate projects worth USD 1.1 trillion and expects to construct more than 4 million homes and residential units across the Kingdom by that time. When international investment in Kingdom's real estate is authorized, this ambition will be simple to realize.
- Residential and commercial construction both leads to an increase in the sanitaryware market. As depicted in Vision 2030, 4 million homes are to be made by the end of this decade. Allowing foreign ownership in real estate leads to growth in the construction sector and as the construction sector is directly related to the sanitaryware industry, it is deemed to rise.
- The Saudi population is dominated by immigrants. The homeownership rate in the kingdom clearly shows the disparity in homeownership between Saudi and Non-Saudi Nationals. A large majority of non-Saudi nationals do not own homes in the Kingdom.
- When only 16,37,678 Saudi Nationals do not own a home, there are more than 36,33,707 non-Saudi nationals who do not own a home in Saudi Arabia.
- When home acquisition law is made flexible, a large chunk of the non-Saudi population who do not own homes would demand the home, which will bolster the demand for sanitaryware products.



Source: Mordor Intelligence

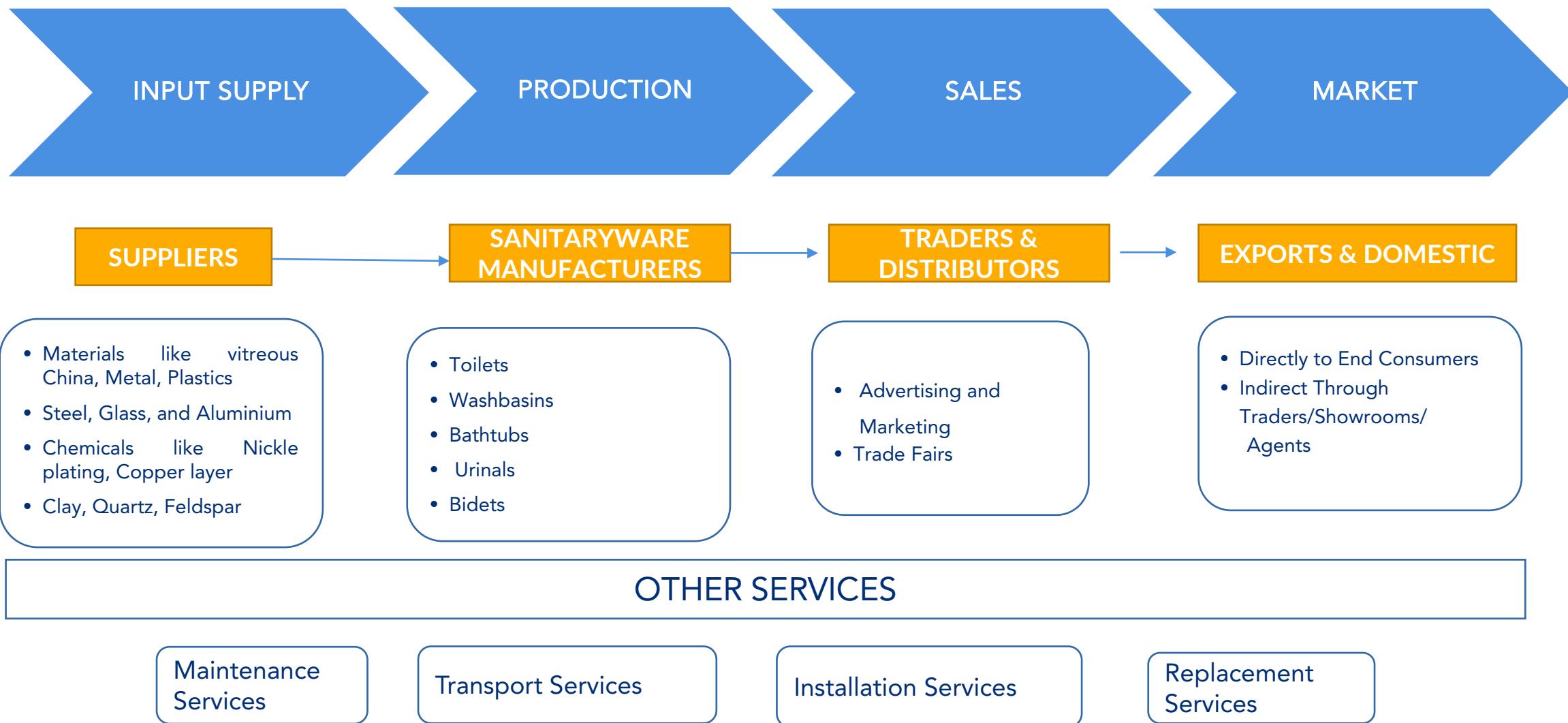
4.4 MARKET OPPORTUNITIES

HOUSE OWNERSHIP IN SAUDI ARABIA FOR YEAR 2022, BY NATIONALITY

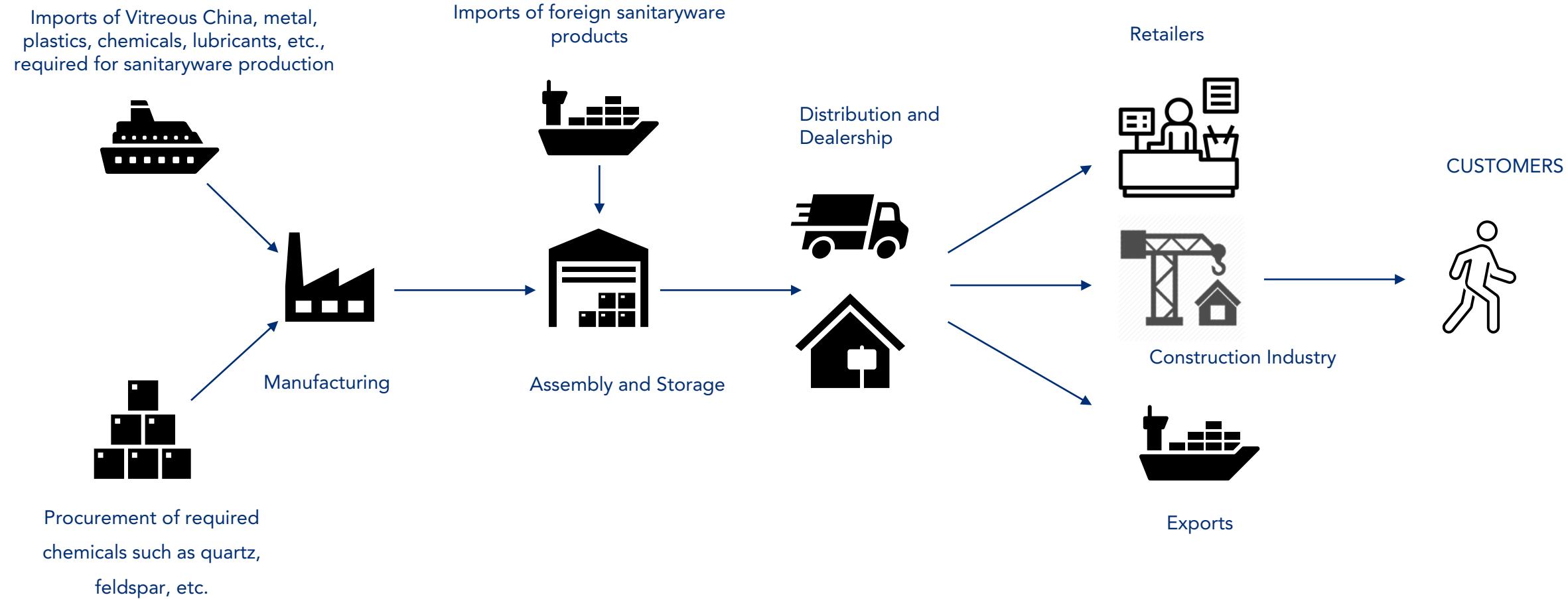


Source: Saudi Census

4.5 VALUE CHAIN ANALYSIS



4.5 VALUE CHAIN ANALYSIS



Source: Mordor Intelligence

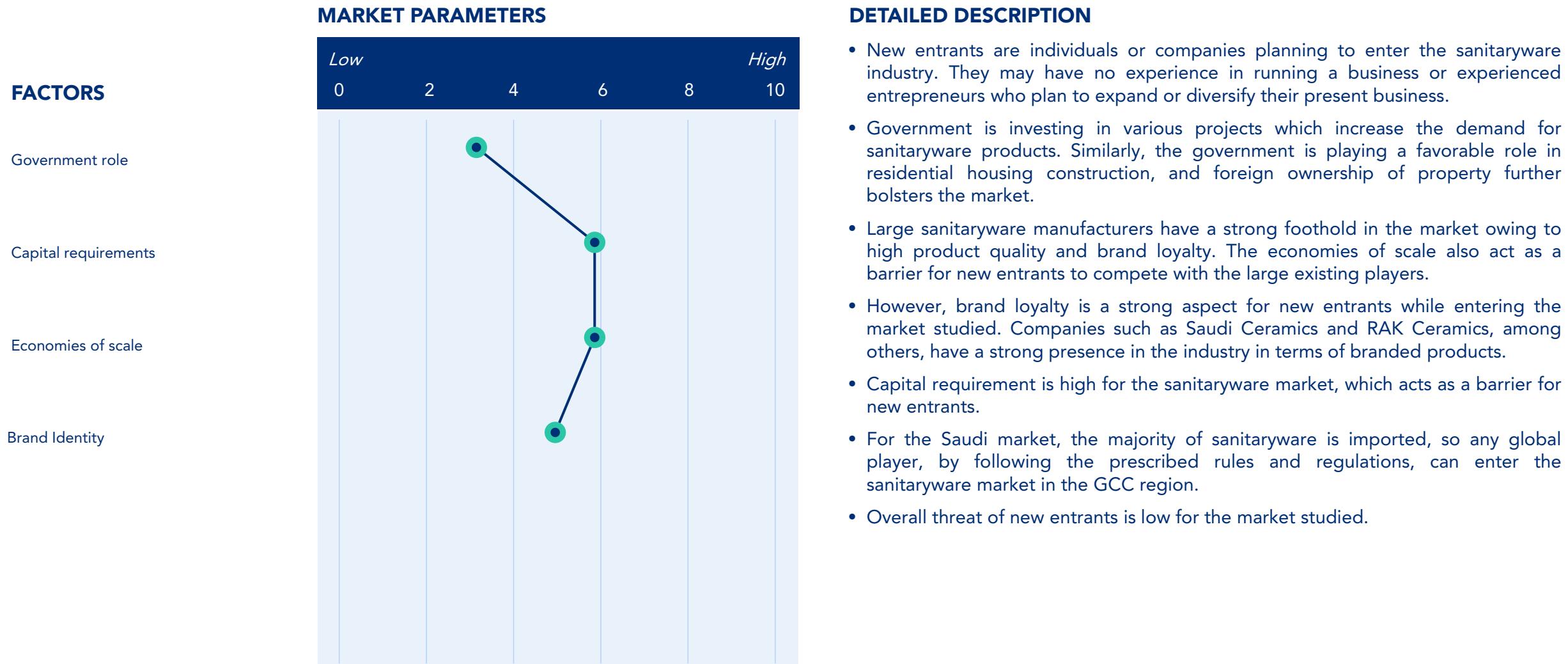
4.6 INDUSTRY ATTRACTIVENESS - PORTER'S FIVE FORCES ANALYSIS



- The bargaining power of suppliers is **Moderate to High** over the forecasted period in the market studied.
- The bargaining power of buyers is **Low to Moderate** over the forecasted period in the market studied.
- The threat of new entrants is expected to be **Low** over the forecast period.
- The threat of substitute products and services is **Low to Moderate** for the market studied.
- The degree of competition in the market studied was moderate to **High** over the forecast period.



4.6.1 THREAT OF NEW ENTRANTS



Source: Mordor Intelligence



4.6.2 BARGAINING POWER OF BUYERS

FACTORS

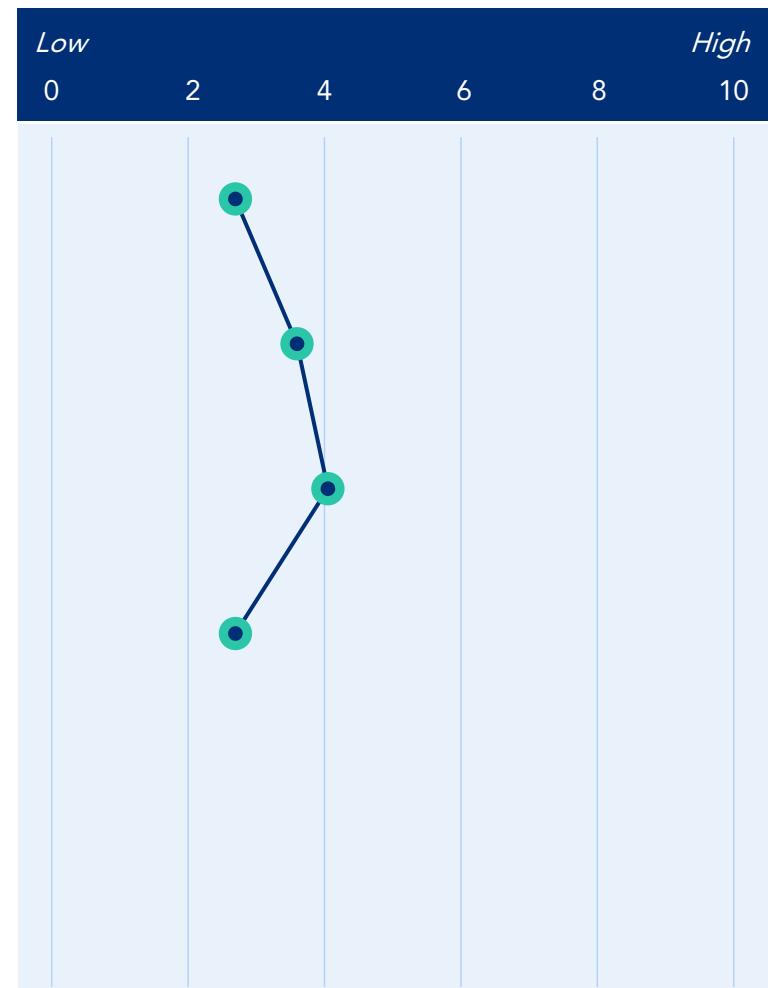
Buyer concentration to firm concentration ratio

Buyer information availability

Buyers Volume

Availability of existing substitute products

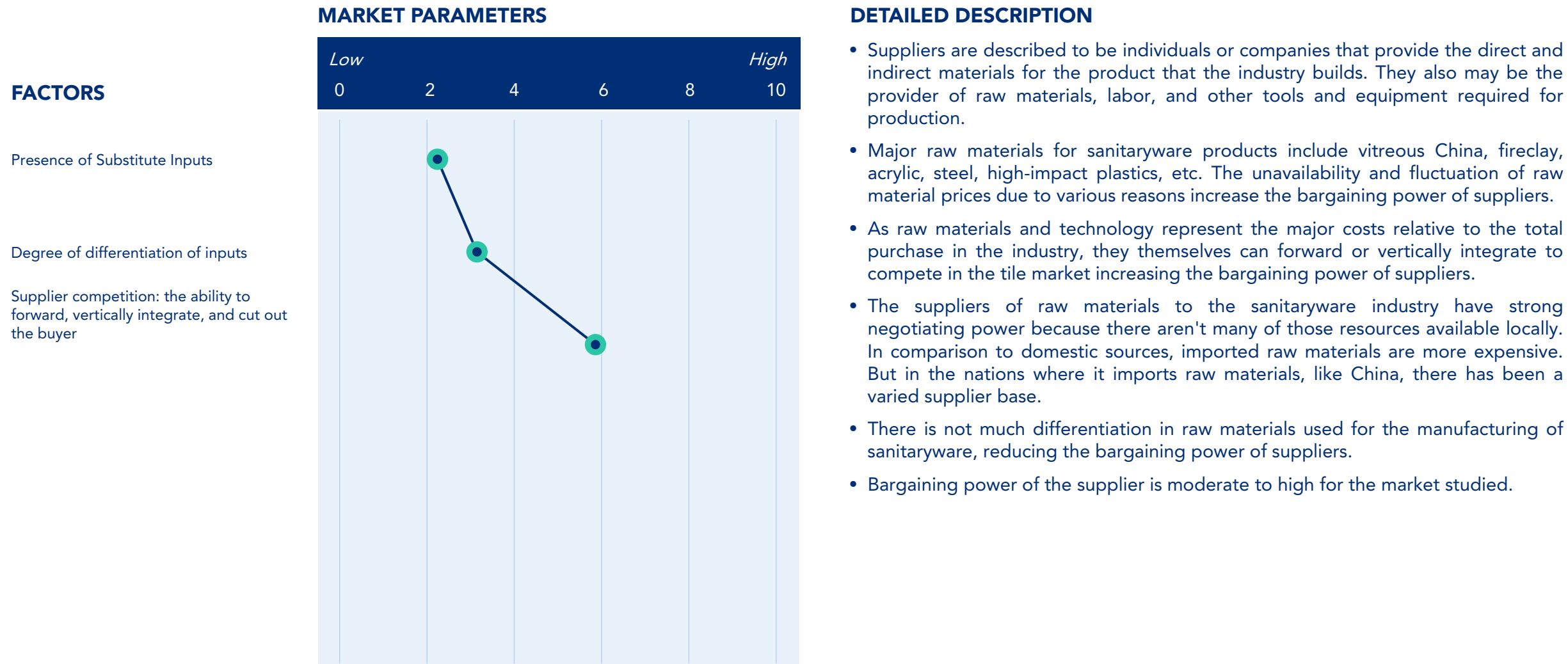
MARKET PARAMETERS



DETAILED DESCRIPTION

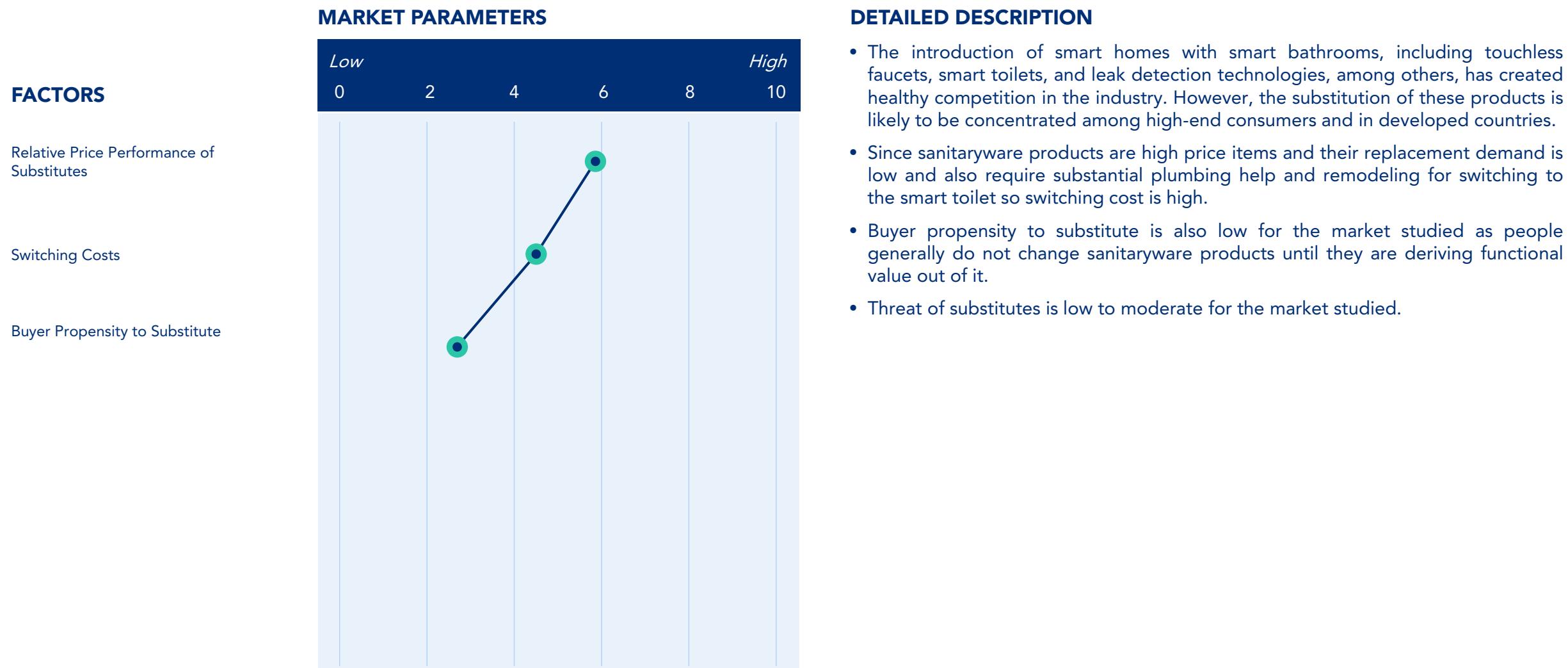
- Buyers are individuals or groups of people that purchase a product at the best possible prices.
- Bargaining power of the buyer is higher for the commercial user while bargaining power is low for the residential user as it is high price purchase item and people buy sanitaryware products less frequently as well as replacement demand is also low.
- Buyer volume is the number of units of product the buyer purchases from all sources. The greater the buyer volume compared to the quantity purchased from the player, the greater the bargaining power of buyers. For commercial and other government projects volume is high compared to other residential buyers resulting in high bargaining power for commercial and government.
- The buyer's concentration relative to firms' concentration is fragmented, giving low bargaining power to the buyer.
- Buyers' information availability is moderate for the sanitaryware industry. More buyers' information about the industry is related to more bargaining power.
- In modern types, sanitaryware products are available in different materials, price ranges, designs, and technology. There are no exact substitutes for sanitaryware products.
- Bargaining power of buyers is low to moderate for the market studied.

4.6.3 BARGAINING POWER OF SUPPLIERS



Source: Mordor Intelligence

4.6.4 THREAT OF SUBSTITUTES



Source: Mordor Intelligence

4.6.5 INTENSITY OF COMPETITIVE RIVALRY



Source: Mordor Intelligence



4.7 INSIGHTS INTO CURRENT TRENDS AND RECENT DEVELOPMENTS IN THE MARKET



THE EMERGING TREND OF WATER CONSERVATION IN SANITARYWARE

- Water scarcity is a persistent issue brought on by insufficient water supplies. Even though water stress can vary greatly from one place to another, the growing worries about global warming and climate change are expected to make the issue of water stress worse. The long-term change in weather patterns and the rise in global temperature caused famines to occur often in various nations.
- Middle Eastern nations like Saudi Arabia are particularly prone to water scarcity. Nevertheless, its effects are being felt all around the world. Because of this, sanitaryware producers are emphasizing the creation of sanitaryware products that consume little water.
- To control the water flow through the sanitaryware, manufacturers are utilizing a variety of technical improvements including sensors and regulators in toilets and urinals. Sensors are used to control the water flow in toilets because toilets use roughly one-third of the water in typical houses. Inefficient old toilet systems waste too much water and are not water-friendly.
- A dual-flush high-efficiency toilet (HET) that offers two alternative flush volumes, low and high, for different needs is one of the typical water conservation strategies used by manufacturers.
- Pressure-assisted toilets are another type of water-saving toilet. Since they are more expensive to acquire and install, pressure-assisted toilets are utilized more frequently in business settings than in homes. While flushing, pressure is exerted. As a result, it uses less water than other conventional toilets, which are solely flush with water.
- Saudi Ceramics manufacturers have come up with water-efficient toilets that help in water conservation efforts. According to studies, the average amount of water used by water-saving toilets is between 3 and 6 liters. This indicates that if Saudi Arabia switched to Saudi Ceramics water-saving toilets for all of its toilets, 300 million cubic meters of water would be saved annually. Water conserved would be comparable to the Al-Jubail Desalination Plant, the biggest of its kind in the world.
- People in the GCC region are also becoming aware of water-efficient sanitaryware and demand water conservation-certified sanitaryware. Recently, at the beginning of 2022, the UK designer and manufacturer of the world's lowest water flush toilet, 'Propelair,' entered the Gulf market through a partnership with Dubai-based bathroom and kitchen solution provider Aquaforce.



Source: Mordor Intelligence





4.7 INSIGHTS INTO CURRENT TRENDS AND RECENT DEVELOPMENTS IN THE MARKET



Ideal Standard

Source: Mordor Intelligence

- In early 2023, One of the world's top manufacturers of full bathroom and kitchen fixtures, GROHE, partnered with Bayt Alebaa in Jeddah, the premier supplier of ceramics, marble, kitchens, and sanitaryware in the Kingdom. This is a one-of-a-kind showroom showcasing magnificent designs, ground-breaking sustainability solutions, and cutting-edge technology from GROHE.
- As GROHE grows its influence in the Kingdom, the relationship with Bayt Alebba is another tactical move. The GET series of faucets from GROHE, which are only sold at Bayt Alebba, will be on display at the showroom. Additionally, customers and companies in the Kingdom will have access to GROHE's popular bath and kitchen solutions, which are specifically created to meet sustainability and design standards along with their modern designs and functionalities.
- A large number of Saudi consumers now have access to GROHE products that promote sustainable and ethical water consumption with the company's partnership with Bayt Alebba.
- The Kingdom's main goals in Saudi Vision 2030, which include achieving net zero by 2060 through new investments in energy and water-conserving technology, are also in line with GROHE's Saudi expansion. The product line from GROHE features innovative designs that are tailored to fit contemporary lifestyles and environmental requirements, such as touchless faucets that can drastically reduce water use by up to 70% and help businesses achieve green certification.
- In March 2023, The "Together in Riyadh" event was held at the Intercontinental Palms Golf Club. The event was held as a partnership between Ideal Standard a world authority on developing cutting-edge bathroom solutions and Al Hayat Building Materials. The occasion served as a platform to display the most recent ideal Standard product introductions, such as the Atelier Collection.
- The Blend Cube toilet, which uses AquaBlade® Technology, a patented invention of Ideal Standard, was one of the outstanding items in the Atelier Collection. A cleaner and more hygienic flushing experience is produced by AquaBlade Technology, a unique approach to toilet design. Compared to conventional flushing methods, the technique uses a specially created water flow to thoroughly clean the entire bowl.
- At the event, Ideal Standard showcased its faucets with state-of-the-art technology, including the FirmaFlow+ cartridge and LightMove technology. These faucets were presented in an array of PVD finishes, adding an extra touch of elegance to any bathroom setting





4.7 INSIGHTS INTO CURRENT TRENDS AND RECENT DEVELOPMENTS IN THE MARKET



الخزف السعودي
Saudi Ceramics

- Saudi Ceramic Co. and Eczacbaş Yap Gereçleri A.. (EYAP), a subsidiary of Turkey's Eczacbaş Group, signed a letter of intent (LOI) in April 2023. Both parties will research the creation of a joint venture (JV) with equal ownership in Saudi Arabia that would produce and market sanitaryware and its accessories. The LOI states that in the event of a deal, all factories and assets of Saudi Ceramics' sanitaryware division will be transferred to the new business.
- The Eczacbaş Group is a significant Turkish conglomerate with a section for building materials and sanitaryware as well as various well-known brands, Vitra being the most significant. Additionally, it has sanitaryware and accessory manufacturers in Turkey and internationally.
- Amid a challenging market elsewhere in the Gulf, RAK Ceramics, a UAE-based tile and sanitaryware company, has been seeking to grow its Saudi business. Saudi Arabia has been a crucial market for RAK Ceramics, especially in the tile and sanitaryware sectors, where the company experienced considerable expansion, contributing to the company's favorable year-over-year growth. To meet local demand, RAK Ceramics has been considering building a second manufacturing facility in Saudi Arabia.
- The idea of making one's bathroom a distinctive and fashionable space is becoming more popular. To turn their bathroom into a distinctive wellness place, people are experimenting with numerous sanitaryware options and personalization.
- Customers are selecting sanitaryware items with minimalistic, simple designs and clean lines that give off a tranquil vibe. Although eye-catching, these simple designs are never cluttered. The products that don't look bulky and take up little room, like washbasins and toilets, are currently in style. They are therefore perfect for smaller residences in cities.
- Nowadays, pedestal sinks are being replaced with more contemporary, slim-edged over-the-counter sinks, and traditional closets with stylish wall-mounted European closets. The new thin rim designs take up less room and are more aesthetically pleasing, requiring less water and being simpler to maintain.





4.8 INSIGHTS ON TECHNOLOGICAL INNOVATIONS IN THE MARKET



TECHNOLOGICALLY ENABLED SMART TOILETS

- Automatic flushing, overflow safety, water-saving features, self-deodorizer, sensor-enabled commercial LED lighting, self-cleaning features, and more are included in smart toilets. These high-tech toilets are quickly becoming a standard feature in smart homes.
- This trend is being driven by an increase in the demand for sanitary products, consumer lifestyle changes, and global awareness of water conservation. Innovative features that are not offered by regular toilets have been manufactured by companies.
- In the future, internet-connected toilets with sensors will be able to examine waste. This function will be helpful in spotting the first indications of chronic, crippling diseases including cancer, diabetes, infections, and renal disease. These restrooms will also communicate information about public health and keep an eye out for illnesses before they become full-blown pandemics.
- The idea of bathrooms is shifting as a result of smart plumbing equipment. Each user has the option to customize the environment, cleaning pressure, and temperature. It is anticipated that such cutting-edge technologies would remain popular for many years to come.
- One of the most well-liked technological developments in the sanitaryware industry is smart bathrooms, which come with contemporary sensors that can spot leaks and damaged pipes.
- Plumbing issues can be made less severe with the use of smart leak detectors. The sensors detect leaks and sound an alarm or send out a notice. A few sophisticated systems closed the valves to stop significant harm or water loss. They can warn the homeowner about freezing temperatures and humidity problems.

Source: Mordor Intelligence





4.8 INSIGHTS ON TECHNOLOGICAL INNOVATIONS IN THE MARKET



- The use of technology is widespread in all aspects of life, including personal hygiene. Everything is managed by people using their smartphones. The most important advancements in the sanitaryware sector involve technology-enabled features like overflow safety, water-saving measures, etc. To provide clients with technologically cutting-edge sanitaryware options, manufacturers are fiercely competing.
- Consumers today are concerned about the environment and want to spend less on utilities while using less water. They are still devoted to saving water and are prepared to make a financial investment. Because of this, manufacturers are emphasizing sanitaryware's water-efficiency features in addition to the technological improvement in smart toilets. Additionally, several producers promote their sanitary products as being water-efficient.
- Along with technological advancements, a number of breakthroughs are occurring in the manufacturing sector, where better technology produces high-quality sanitaryware at lower costs, with less energy use, and with fewer emissions.

WATER CONSERVING SANITARYWARE PRODUCTS

- Manufacturers are spending a lot of money designing sanitaryware that uses little to no water in order to conserve water. The most recent development in sanitary ware technology is the waterless urinal. A waterless urinal is made to conserve between 20,000 and 45,000 gallons of water annually.
- RAK Ceramics, one of the leading sanitaryware providers in Saudi Arabia has developed different types of flushing systems that are in line with water conservation.
- Installing a toilet with a dual-flush cistern is one of the simplest ways to conserve water. With different flushing volumes, 6 liters for the full flush and 3 liters for the half flush, RAK CERAMICS flushing systems provide users with the option of using either method. The cisterns can be set to flush with a reduced full flush volume of 4.5 liters to further reduce water consumption.

Source: Mordor Intelligence





4.8 INSIGHTS ON TECHNOLOGICAL INNOVATIONS IN THE MARKET

SUSTAINABLE ENERGY USE FOR SANITARYWARE MANUFACTURING



- Growing number of companies are investing in improved technology with lower energy requirements for sanitaryware production. Low-temperature firing, Spot Glaze Repair, etc. are some of the innovative technology being used in sanitaryware manufacturing.
- Flash Sintering technology allow reduced temperature and firing time which can cut emission, costs, and energy. This technology is being set up in sanitaryware manufacturing units. Reduced energy cost with the improved technology leads to competitive advantage and profitability for sanitaryware manufacturers.
- In today's industrial world, concepts like energy efficiency, sustainability, and decarbonization are frequently used. The global consumption of energy has been extensively studied in the literature (Berg, 2015). From an energy standpoint, the ceramic sector has been specifically researched in detail.
- From a thermal perspective, the sanitary-ware industry sector is very intriguing. The large amount of thermal energy needed to produce sanitary ware items is needed at various temperature levels in various factory subprocesses. In actuality, the temperature and quantity of residual heat from fire are perfectly suited to feed additional thermal processes like drying or heating.
- RAK Ceramics invested in cutting-edge manufacturing technologies and sustainability initiatives totaling over 4.5 million AED in August 2022. The business has made investments in a number of cutting-edge technologies, including the next generation of digital glazing, an advanced scanning solution, efficient online mosaic production, ecologically friendly methods for recovering and recycling rejected tiles and sanitaryware, etc.
- RAK Ceramics announced in February 2023 a USD 14 million investment in its sanitaryware production line in the United Arab Emirates, modernizing the plant with the most cutting-edge technology kilns and improving the company's sanitaryware operating model sustainably. With the ability to switch to hydrogen fuel in the future and innovative features for waste heat recovery, the investment will enable the sanitaryware line to incorporate the most recent technology into the heat exchanger system of kilns. Once the system is up and running, the company will be able to maximize and improve production efficiency, resulting in considerable reductions in both energy use and carbon emissions. The method also permits a higher yield during production, which lowers waste and boosts capacity utilization.

Source: Mordor Intelligence





4.9 IMPACT OF COVID-19 ON THE MARKET



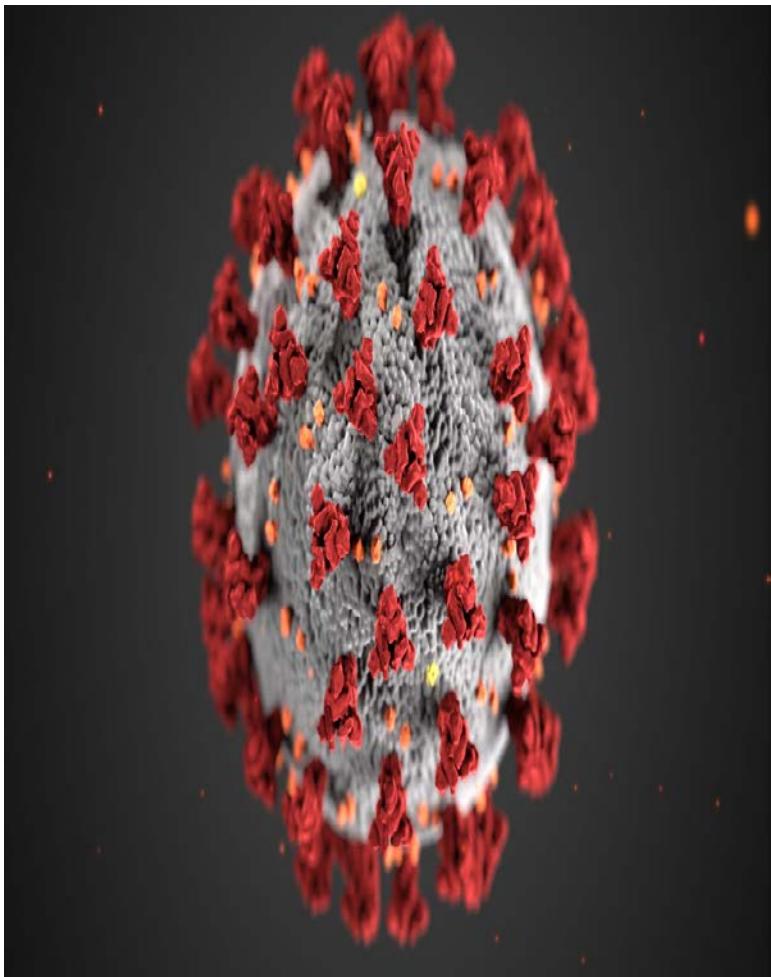
Source: Mordor Intelligence

- Most economic sectors, including tourism and the service sector, experienced a slowdown during the initial lockdown period as a result of the extended lockdown and travel restrictions. Due to the delays in numerous commercial construction projects, including hotels and shopping centers, the Saudi Arabian market for sanitaryware also had a hard time.
- During the pandemic, many plumbers, engineers, and manufacturers of sanitaryware experienced delays or cancellations of commercial projects, which effectively forced the sector to adopt cutting-edge building techniques and new technology.
- As the COVID-19 outbreak scenario worsened, the Saudi Government's finances declined because to the low oil prices, which had a severe impact on the government's economic investment program and massive infrastructure projects that were under construction. In the short to medium term, the government's efforts to diversify were severely impeded.
- Additionally, COVID-19 has had a positive impact on sanitation and cleanliness. The importance of hygiene and hygienic products was a reoccurring subject throughout the world, including Saudi Arabia, as a result of the COVID-19 epidemic. People began to pay more attention to sanitation. People began routinely washing their hands, taking good care of the local sanitation, etc. as recommended by official protocols, which are now accepted practices.
- The sanitaryware market later benefited from the public's increased awareness of hygiene. Since Saudi Arabia is an import-based market, the supply chain was interrupted during the lockdown; nevertheless, after the limitation was loosened, the demand for sanitaryware in the Kingdom increased.
- As more people grew aware of the necessity to practice excellent hand hygiene and prevent cross-contamination on 'high-touch' surfaces, COVID-19 further drove the emergence of technologically advanced facilities like sensor-based upgrades and touch-less washroom items. Consumers now want to use restrooms that are touch-free and have conveniences like sensor-operated faucets, soap dispensers, hand dryers, and flush valves.
- People spent the majority of their time inside their houses during the pandemic-related lockdown, thus many embarked-on home repair projects. One of the most common projects undertaken during the pandemic was bathroom remodeling. As a result, there was an increase in demand for sanitaryware following COVID-19.





4.9 IMPACT OF COVID-19 ON THE MARKET



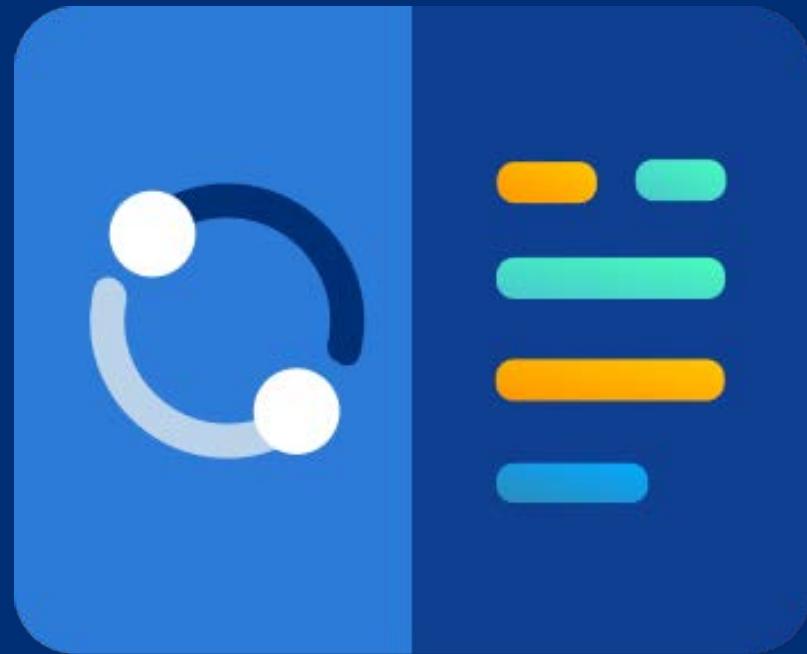
- Individuals are aware of the necessity for a wellness area within the home because the majority of individuals were confined to their homes during the lockdown. Following COVID-19, there is a growing trend of using upscale sanitaryware to transform the bathroom into a wellness area.
- Nowadays, individuals consider whether a certain piece of sanitaryware adds elegance and a distinctive style statement to their bathroom rather than just focusing on the sanitaryware's essential features.
- Architects, product designers, and interior designers are currently redesigning many bathroom fixtures. They will need to consider the fact that individuals are instructed to only touch objects if necessary and to wash their hands as soon as possible with soap and water. This behavior will promote the use of motion- and sensor-based, voice-activated bathroom fixtures.
- The development of smart bathrooms has also been driven by COVID-19. Before the epidemic, sensor-controlled toilets and urinals were less widespread. Now, they are widely used. After the COVID-19 outbreak, sanitaryware items became more widely used and featured technology like heated seats, voice-controlled toilets, motion-detecting lights, water-saving sensors, etc.
- The government spent less money and paid less attention to the development of the non-oil industry as a result of the sharp decline in crude oil prices brought on by COVID-19. The lifting of COVID-19 restrictions as a result of a significant drop in cases and widespread vaccinations, as well as a significant increase in crude oil prices (from pandemic lows of around USD 40 per barrel to levels of USD 100–120 per barrel in FY 2022), have, however, led to a significant improvement in economic activity in the Kingdom. The Kingdom's sanitaryware market will expand as construction industry activity picks back up.
- For sanitaryware manufacturers globally, the past couple of years have been challenging due to a combination of factors, including Covid's activation of supply-side constraints that raised freight prices. The increase in transport costs, which reduced profits, had to be significantly felt by Saudi Arabia, whose ceramic industry is highly dependent on imports. Other expenditures have increased over the last two years as well, such as energy costs and the cost of raw materials, which has reduced the profit margin.

Source: Mordor Intelligence



5 MARKET SEGMENTATION

- 5.1 By Product
- 5.2 By Material
- 5.3 By End User
- 5.4 By Distribution Channel





5.1 BY PRODUCT

5.1.1 Water Closet

5.1.2 Wash Basins

5.1.3 Pedestals

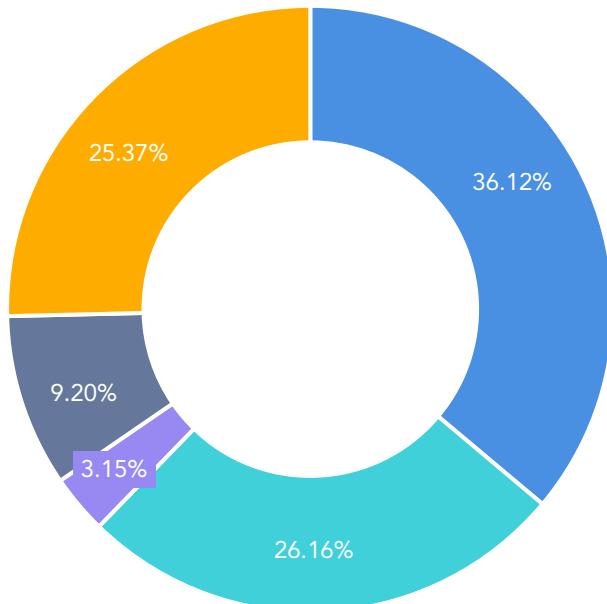
5.1.4 Cisterns

5.1.5 Other Products



5.1 MARKET SEGMENTATION – BY PRODUCT

SANITARYWARE MARKET, MARKET SHARE (%) , BY PRODUCT, SAUDI ARABIA, 2022



■ Water Closet

■ Wash Basins

■ Pedestals

■ Cisterns

■ Other Products

SANITARYWARE MARKET, REVENUE IN USD MILLION, BY PRODUCT, SAUDI ARABIA, 2019-2028

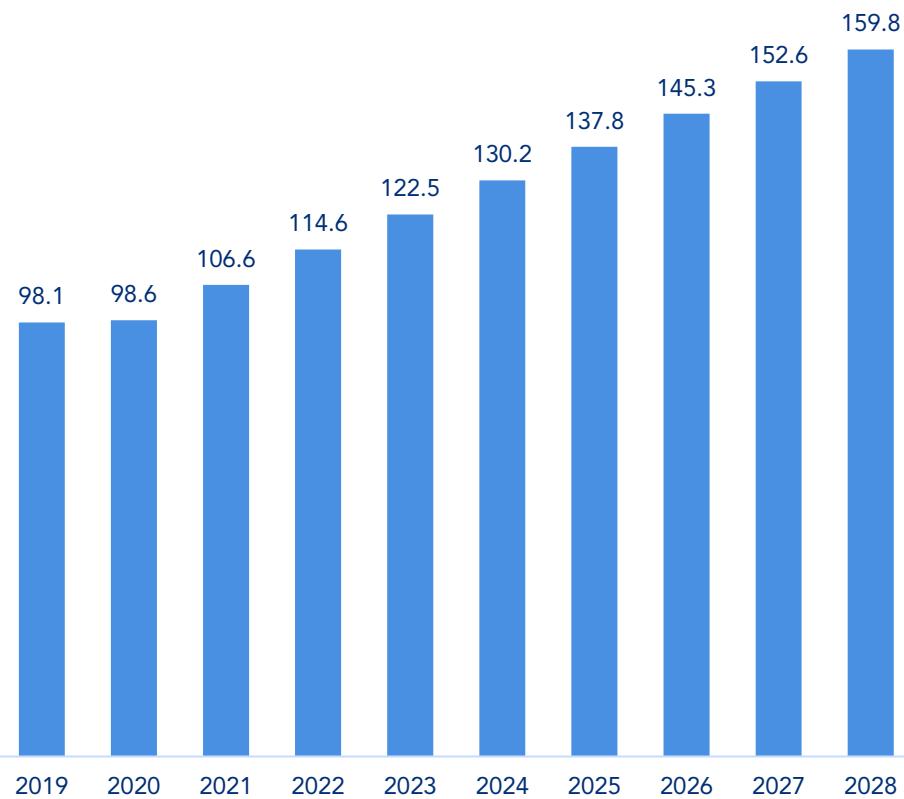
Product	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (%) (2022-2028)
Water Closet	98.1	98.6	106.6	114.6	122.5	130.2	137.8	145.3	152.6	159.8	5.7%
Wash Basins	68.4	69.6	76.2	83.0	89.8	96.6	103.5	110.5	117.4	124.5	7.0%
Pedestals	8.6	8.6	9.3	10.0	10.7	11.3	11.9	12.5	13.1	13.7	5.4%
Cisterns	24.8	25.0	27.1	29.2	31.3	33.4	35.5	37.5	39.5	41.5	6.0%
Other Products	67.7	68.5	74.5	80.5	86.6	92.7	98.7	104.6	110.5	116.4	6.3%

Source: Mordor Intelligence

5.1.1 WATER CLOSET

SANITARYWARE MARKET, REVENUE IN USD MILLION, WATER CLOSET, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 5.7%



Source: Mordor Intelligence

- The water closet segment of the market was valued at USD 114.6 million in 2022 and is expected to reach USD 159.8 million in 2028, registering a CAGR of 5.7% for the period (2022-2028).
- There are different types of water closets:
 - Based on installation method – Wall Hung WC, Floor Mounted WC
 - Based on Trap Type – S-Trap WC, P-Trap WC
 - Based on Design Type - Open Rim WC/ Rim Less WC, Boxed Rim WC, Eastern Water Closet
- A wall-hung WC is a system in which the toilet bowl is mounted directly to the wall while its tank is installed inside the wall.
- Wall-hung WCs are becoming an increasingly popular option for those looking to create contemporary-style bathrooms in their homes or business premises.
- The major factor driving these WC is that they save space in the bathroom while giving a more modern look since the tank is concealed behind the wall.
- The wall-hung toilet is very popular for its ecological aspect thanks to its water savings. Many hidden cisterns come with adjustable flush volumes, so users can choose how much water they want. In addition, it is less noisy than most installations because it has economic hunting.
- Floor-mounted WC is fixed to the floor where the trap is attached to the bathroom floor. These are often used in commercial buildings, as they allow more room for storage underneath than wall-mounted units.
- The driving factor for the floor-mounted WCs is that they have a flush tank attached to the seat outside, making any such kind of repair easy.
- Installation is one area where a classic, floor-mounted toilet is advantageous. It is easier to fit a floor-mounted toilet than a wall-hung toilet. This is primarily because, with a wall-hung toilet, the tank needs to be fitted into the wall. This is a more significant job overall and requires more complicated plumbing.

5.1.1 WATER CLOSET



An S-trap WC is where the toilet waste pipe connection is on the floor. The set out for an S-trap is the distance from the wall to the center of the pipe penetrating the floor.

Source: Mordor Intelligence



P-traps are U-shaped pipes in toilets and underneath sinks. P-traps hold a small amount of water that prevents sewer gases from rising.

5.1.1 WATER CLOSET

- A rimless WC is a toilet without a rim where the water normally flows from in a traditional toilet. Instead of water flushing down, a rimless toilet has a flushing system that shoots water towards the edge and around the toilet bowl, leaving no spots missed.
- It changes the way water enters the bowl during flushing. It uses a rear-mounted valve that pushes water into the bowl horizontally along the sides. There are no hidden crevices for waste to enter and get stuck. It produces a cleaner flush every time.
- The demand for rimless WC is rising because it is a far more hygienic style of toilet. In removing the rim, the space in a standard toilet which is the most significant breeding ground for germs to build is eliminated. It makes the rimless toilet much easier to clean because no hidden spaces can't be seen or reached.
- Another factor that favors the rimless WCs' growth is their efficiency. They use much less water than rimmed toilets because the flush system is much more efficient. Instead of water traveling directly down, its circular route around the toilet covers more of the pan, meaning less water is required to clean the toilet.
- Less water means lower water bills, making the rimless toilet a cost-effective solution is another driving force for this segment.
- There's an excellent range of rimless toilets, with a wide variety of styles and types, from wall-hung toilets to back-to-wall toilets.
- The boxed rim WC borders the top of a toilet bowl to distribute the flush water evenly in a downward motion.
- The demand for the boxed rim WC has reduced because of the advantages associated with the rimless WCs.



Source: Mordor Intelligence

Rimless
WC



Boxed Rim
WC



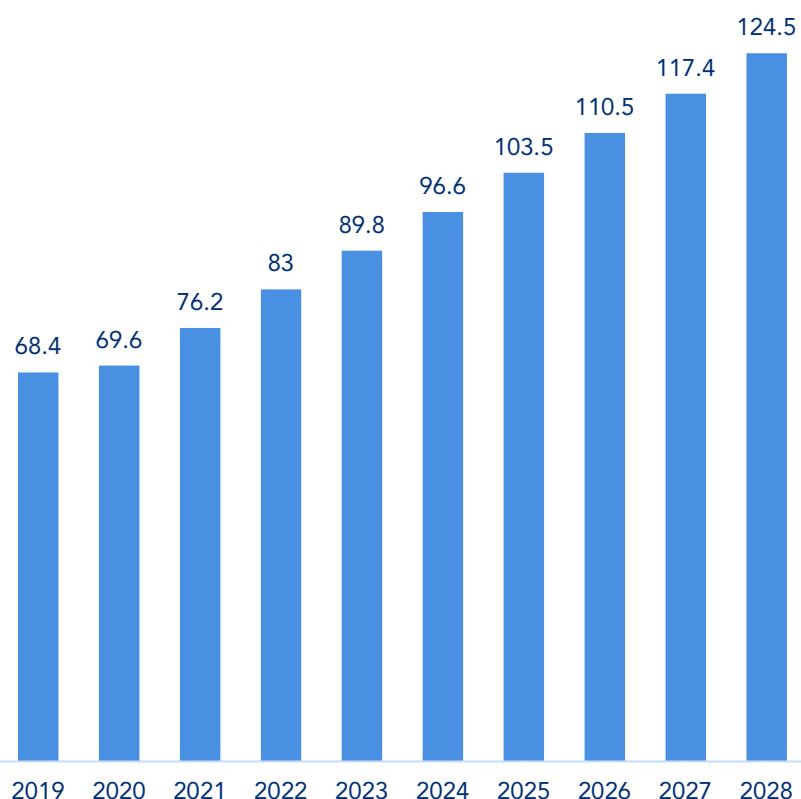
Eastern
WC



5.1.2 WASH BASINS

SANITARYWARE MARKET, REVENUE IN USD MILLION, WASH BASINS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 7.0%



Source: Mordor Intelligence

- The wash basins segment of the market was valued at USD 83 million in 2022 and is expected to reach USD 124.5 million in 2028, registering a CAGR of 7.0% for the period (2022-2028).
- India exports most of its wash basins to Saudi Arabia.
- There are different types of washbasins in the market, which include countertop washbasins, floor-standing washbasins, wall-hung washbasins, and other washbasin types.
- Also known as vessel basins or sit-on bowls, countertop basins are often the choice of the contemporary or minimalistic bathroom design. It usually sits on top of a worktop or shelf and is paired with a tall or wall-mounted basin taps.
- Since countertop basins are not built for a distinct purpose, such as saving space or fitting into a corner, they are available in stunning shapes, sizes, finishes and designs.
- Manufacturers are innovating and focused on new product development. They also manufacture countertops using mixed metal products. Washbasins with mixed brushed nickel, mixed brass fixtures and chrome fixtures are being produced to offer a unique look in bathrooms.

FLOOR STANDING WASHBASINS

- Floor-standing washbasins are also known as pedestal sinks. This type of installation is simple and linear. They are independent pieces and do not require counters or cabinets.
- One of the best aspects of a floor-standing sink is that it enhances the look of the floors. The pedestal covers a small area, and the floors stand out more than a standard vanity sink.
- With the multiple color options, people can pick a color that makes their floors "pop" instead of blending in with the sink like a vanity. The color of most vanity sinks is chosen to blend in with the floors and walls, not to stand out and look different, like floor-standing sinks.
- The most significant driver of freestanding sinks is that they allow users to save space. The pedestal base is much smaller than the cabinets in a vanity sink.
- Floor-standing sinks are perfect for smaller bathrooms, half baths, and powder rooms because they are so small.
- With the space saved from pedestal sinks, users can choose to have larger closets in the bathroom.





5.1.2 WASH BASINS

WALL-HUNG WASHBASINS

- Wall-hung washbasins are a great space-saving tool when fitting a new bathroom. Because they are not touching the floor, they create an illusion of greater space in the bathroom and help to make it less cluttered.
- Wall-hung washbasins are usually fitted with either a chrome-plated bottle trap underneath or with a matching white ceramic semi-pedestal. The latter has become increasingly popular because it is easier to keep clean than a polished chrome bottle trap while still giving a stylish wall-hung look.
- They are fixed to the wall by a rag bolt. They remove height issues as they are fitted as per the users' preference. Most homeowners own them as they are economical and easily accessible and are available in several styles.
- The main benefit of wall-hung installations is that they eliminate the need for a washbasin installed on a counter or tabletop, making them more cost-effective because they eliminate the need for additional furniture.
- They have very minimal aesthetics; unlike tabletop washbasins, they don't require any counter to be installed. In addition, they don't have any cupboards and cabinets beneath them, which saves much space and makes them the first preference of potential customers.
- A wall-mounted basin is convenient and comes without any other frills. It just comes with a plumbing and trash disposal fixed inside the wall, keeping the bathroom neat and giving it a spotless and minimal look.
- On the other hand, these washbasins can be a little uncomfortable since they have a shortage of storage and standing space, which can cause discomfort in the long run. Therefore, the user needs to look for bathroom storage needs while choosing a wall-mounted washbasin. Various sanitaryware manufacturers provide customers with the most suitable washbasin for the bathroom.

OTHER WASHBASINS

- Other washbasin types include washstand basins, corner basins, semi-recessed basins, and cloakroom basins.
- Usually traditional in design, washstand basins are a great way to create the illusion of extra space in the bathroom. With a frame that doubles as a place to hang towels, they will help create an elegant, minimalist bathroom.
- The corner basin has been designed to fit into a right-angle corner in almost any room. They are ideal for cloakrooms or small bathrooms where the only available space is in the corner of the room. Available in wall-mounted and floor-standing forms, the corner basin is a practical and affordable solution for space.
- Semi-recessed basins are crafted with ledges, shelves or coordinating bathroom furniture. The front of the basin usually has a smooth and rounded edge, with the reverse specifically cut to fit where it is needed to sit. The result is that the basin looks like a seamless furniture part. These basins are available in a wide selection of different sizes and shapes.
- Cloakroom basins are a fantastic space-saving solution for a small toilet or guest bathroom. Usually consisting of a one or 2-tap hole basin and a half pedestal or chrome bottle trap, the cloakroom basin is a perfect choice if there is short space. As this basin type is smaller, people will need to pair it with a smaller basin tap to wash their hands comfortably.

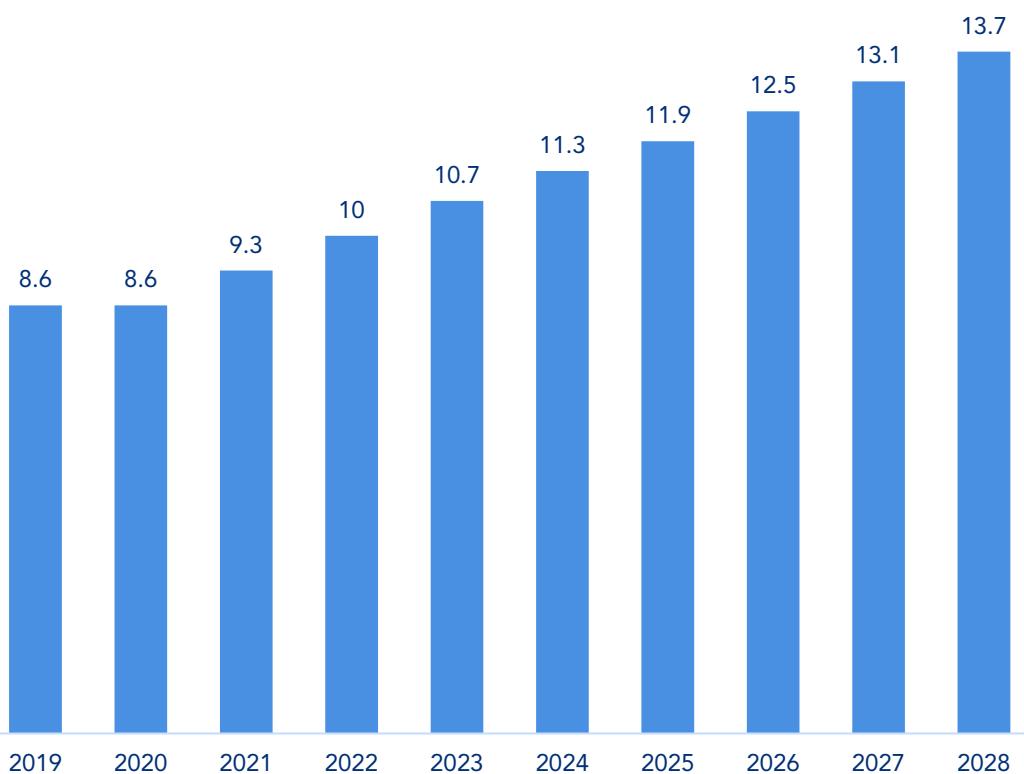
Source: Mordor Intelligence



5.1.3 PEDESTALS

SANITARYWARE MARKET, REVENUE IN USD MILLION, PEDESTALS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 5.4%



- The pedestals segment of the market was valued at USD 10 million in 2022 and is expected to reach USD 13.7 million in 2028, registering a CAGR of 5.4% for the period (2022-2028).
- Wash basin's support is called a pedestal. Running vertically from the washbasin to the bathroom floor is a whole pedestal. The pipes are concealed by a wall-mounted Semi-Pedestal.
- The most popular material used to make pedestal sinks is vitreous China, although it can also be made of fireclay, marble, and ceramic.

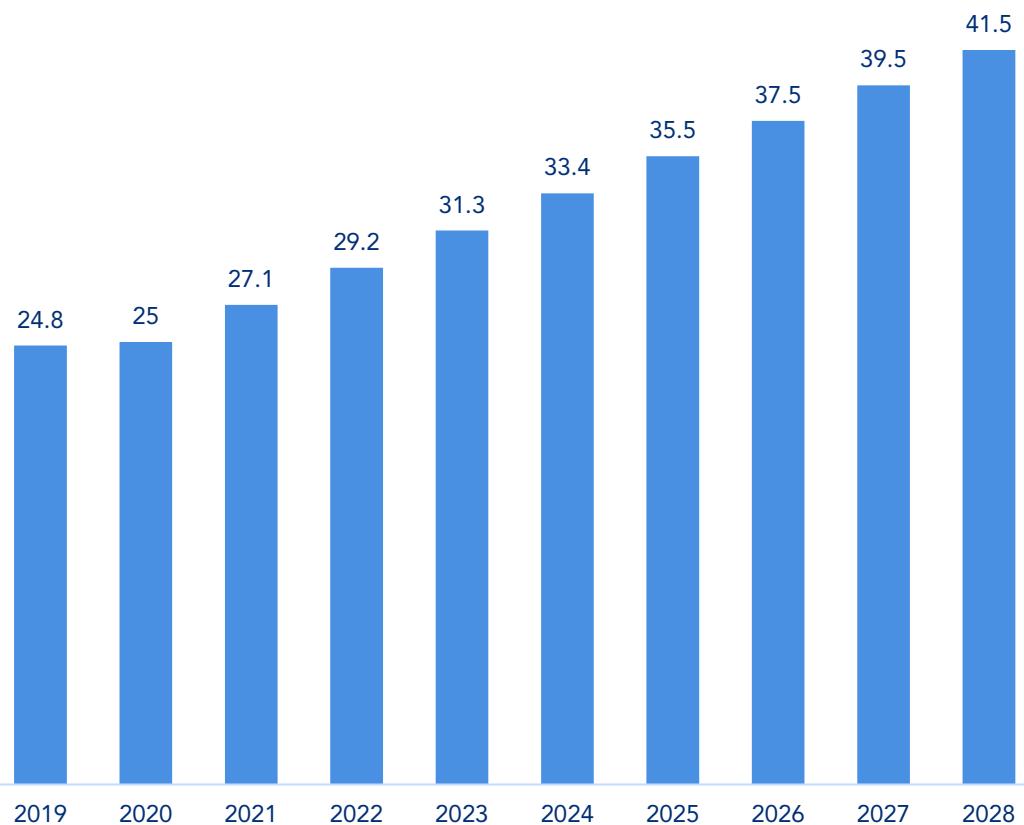


Source: Mordor Intelligence

5.1.4 CISTERNS

SANITARYWARE MARKET, REVENUE IN USD MILLION, CISTERNS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.0%



- The cisterns segment of the market was valued at USD 29.2 million in 2022 and is expected to reach USD 41.5 million in 2028, registering a CAGR of 6% (2022-2028).
- The cistern is an essential part of the basic toilet; the waste cannot reach the sewer without it. The toilet's local cold-water storage is made possible by the bathroom cistern, which is essentially a small tank.
- One of the wide varieties of modern toilets is the close-linked model, in which the cistern is fixed directly on the toilet bowl with no pipes in between. This type of toilet often has a lever or push button flush connected to the cistern. There is also a concealed cistern option, where the cistern is integrated into the wall behind the toilet. Flushing troughs are cisterns that are used in tandem with numerous WCs. In commercial settings, a flushing trough is a cistern that serves multiple toilet pans.

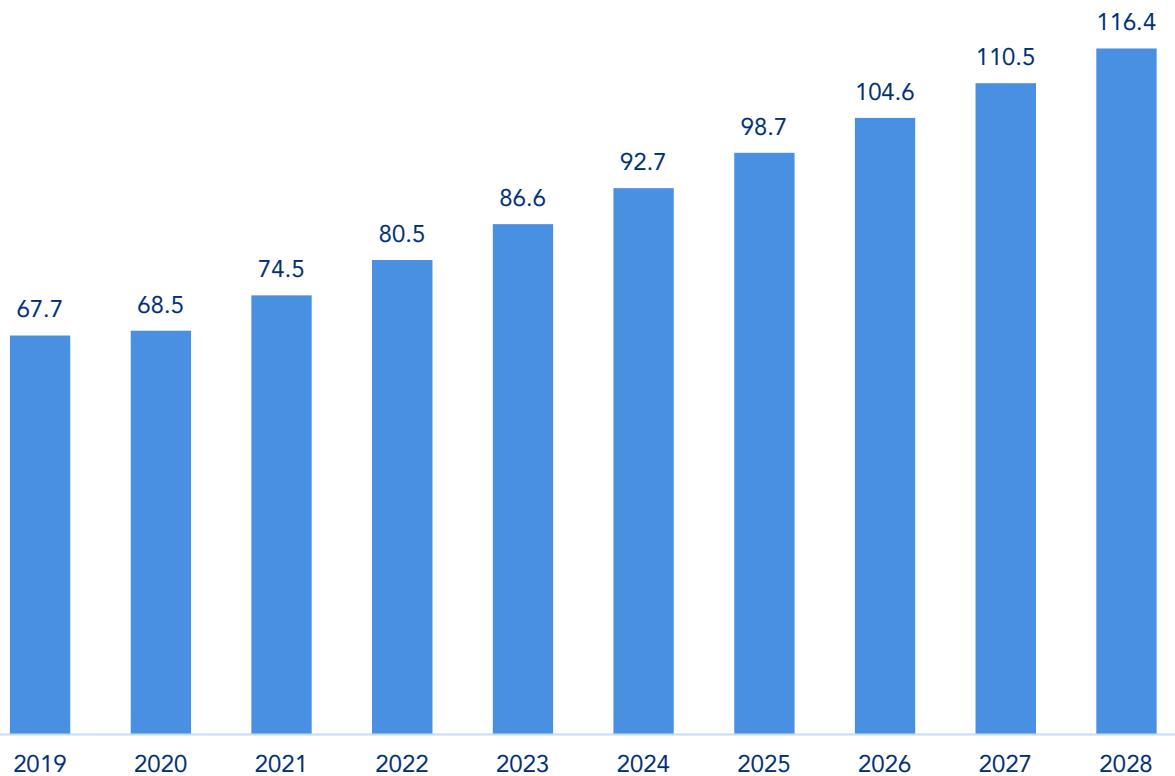


Source: Mordor Intelligence

5.1.5 OTHER PRODUCTS

SANITARYWARE MARKET, REVENUE IN USD MILLION, OTHER PRODUCTS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.3%



Source: Mordor Intelligence

- The other products segment of the market was valued at USD 80.5 million in 2022 and is expected to reach USD 116.4 million in 2028, registering a CAGR of 6.3% (2022-2028).
- The other products segment of the market includes bathtubs, seat covers, shower trays, urinals, and others.
- The bathtub's capacity to soothe the bather's body and mind is one of the key reasons influencing the market's expansion.
- To offer its clients satisfying and comforting products, the leading companies are implementing various methods, including innovation and product launches. A new market opportunity for bathtubs has just emerged, offering its user spa-like therapy. These bathtubs have a digital thermostat that may be controlled. Additionally, it effectively gives people chromo therapy for body and mental relaxation. As a result of the increasing demand for bathtubs in the market over the projection period and the increasing popularity of smart bathtubs with artificial intelligence, this trend is projected to continue.
- Increasing installation in several commercial places, such as hotels, spas etc., to provide luxury services to customers is expected to boost the growth of the bathtubs market in Saudi Arabia. Furthermore, changing customers' preferences toward designing their bathrooms luxuriously and aesthetically in sync with their tastes and brand preferences concerning luxury fittings is projected to influence the market growth over the forecast period.
- Additionally, consumers travel and stay in good hotels with luxurious facilities, improving their tastes and encouraging them to opt for these options in their homes.
- Commercial application is projected to contribute majorly to market growth in the coming years due to increasing demand for bathtubs in various commercial places such as hotels and spas to provide luxury services to customers.

5.1.5 OTHER PRODUCTS

SAUDI ARABIA TOP 3 BATHTUBS

- **Diamond Bathtub** - Wonderful freestanding bathtub available from Diamond. A contemporary tub with a wooden frame coated in a high-gloss black varnish is the ideal addition to a darker bathroom. With a built-in oval tub that will give the most luxurious baths, it boasts an astonishing irregular shape inspired by diamonds' distinct lines and characteristics.
- The perfect design of this sleek, black bathroom gives the space a feeling of opulence and grandeur. This contemporary apartment blends dark hues with warm overtones of gold and orange to create a setting that seems quite opulent and is ready for a day of self-care and guilt-free leisure. To obtain the dark, contemporary bathroom of design dreams, create the most opulent space with distinctive touches.
- **Newton Bathtub** - A notable source of design inspiration is Newton. This bathtub is composed of cast iron that has been painted gold to display its complete golden interior, and it has a curved lip style shape, a classic design element that exudes comfort. This sculptural and creative object will complement the new Master Bathroom Design thanks to the high-gloss black and gold lacquered spheres.
- A mix of gold, white and black makes this the perfect master bathroom. With the Newton Bathtub and the Newton Pedestal Sink, this bathroom is full of texture and pattern. These items are ideal for those who enjoy relaxing in a modern setting.
- **Lapiaz Bathtub** - The typical karst formations produced when limestone rocks erode inspire the design of the Lapiaz Bathtub. This one-of-a-kind bathtub enhances lavish and sumptuous settings with a gold-painted tear contrasting with the stainless steel's mirrored look. A statement bathtub that stands out in any design for a modern bathroom.



Source: Mordor Intelligence



5.2 BY MATERIAL

5.2.1 Ceramic

5.2.2 Metal

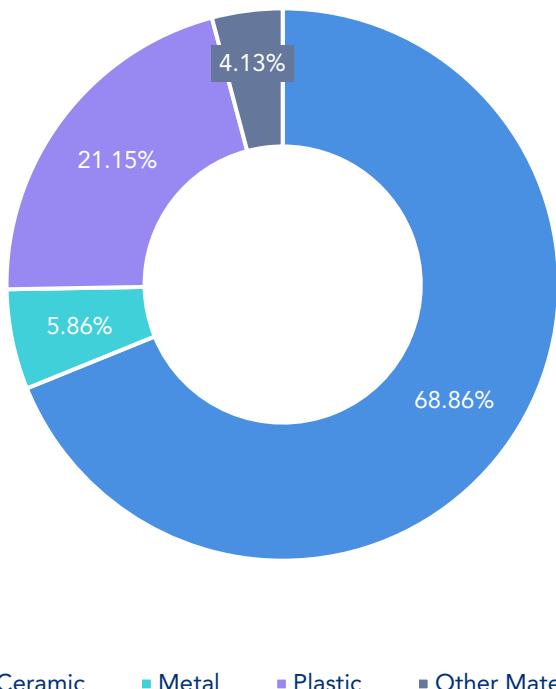
5.2.3 Plastic

5.2.4 Other Materials



5.2 MARKET SEGMENTATION – BY MATERIAL

SANITARYWARE MARKET, MARKET SHARE (%) , BY MATERIAL, SAUDI ARABIA, 2022



SANITARYWARE MARKET, REVENUE IN USD MILLION, BY MATERIAL, SAUDI ARABIA, 2019-2028

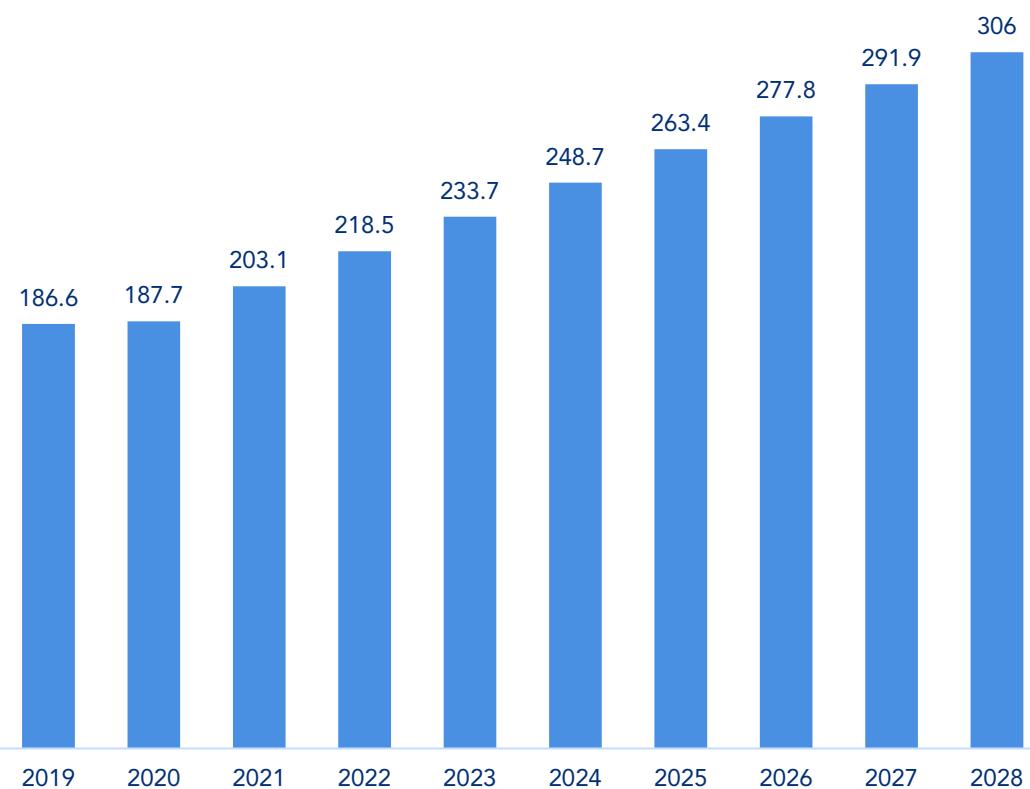
Material	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (%) (2022-2028)
Ceramic	186.6	187.7	203.1	218.5	233.7	248.7	263.4	277.8	291.9	306.0	5.8%
Metal	15.4	15.7	17.1	18.6	20.1	21.6	23.1	24.6	26.1	27.6	6.8%
Plastic	54.5	55.8	61.3	67.1	72.9	78.8	84.8	90.8	97.0	103.2	7.4%
Other Materials	11.0	11.2	12.2	13.1	14.2	15.2	16.2	17.2	18.2	19.1	6.5%

Source: Mordor Intelligence

5.2.1 CERAMIC

SANITARYWARE MARKET, REVENUE IN USD MILLION, CERAMIC, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 5.8%



Source: Mordor Intelligence

- The ceramic segment of the market was valued at USD 218.5 million in 2022 and is expected to reach USD 306 million in 2028, registering a CAGR of 5.8% for the period (2022-2028).
- Ceramic sanitary ware manufacturers maintain peak inventory levels to ensure business continuity and a steady supply of products during the COVID-19 pandemic. However, volatile demand sentiments in the market landscape are affecting revenue streams. Consumers are seen to increase their spending capacity as coronavirus-related restrictions are relaxed. Such trends are expected to boost the market growth.
- The growing work-from-home (WFH) culture, particularly among stay-at-home mothers and parents, demands ceramic sanitary ware and other house necessities.
- During the pandemic, manufacturers in the ceramic sanitary ware market were taking advantage of such opportunities to diversify their revenue streams. They implemented contingency planning to adapt to fluctuating demand and supply trends. Mergers and acquisitions (M&As) assisted in the development of value-added products.
- The Saudi Arabia ceramic sanitary market ware is expected to expand rapidly in the near future as disposable income and living standards rise. Furthermore, rising consumer propensity to spend more on sanitary items and increased sanitation and hygiene awareness is expected to drive market demand.
- Sanitary ware is a fundamental need for private, public, and commercial spaces, which is likely to fuel market growth. Ceramic sanitary ware items are becoming increasingly popular among end users due to their low maintenance requirements, improved resistance to environmental conditions, durability, and high resistance.
- Furthermore, the hospitality industry is expected to grow as a result of the positive outlook in the tourism industry in Saudi Arabia. This is expected to broaden the applicability of ceramic-based advanced materials in the coming years.



5.2.1 CERAMIC



- Consumer demand for restaurants, schools, businesses, retail malls, and other facilities is likely to drive market expansion. Furthermore, rising citizen-building project investments, favorable government policies, and rising consumer disposable income levels are projected to supplement market expansion.
- The construction market in Saudi Arabia is a driving force in the ceramic sanitary ware market. The rise in home projects and commercial spaces is augmenting the market growth.
- Saudi Arabia is the Middle East's largest building market. This may be linked to the country's young and expanding population and the country's high rate of urbanization and industrialization. Industrial assets, such as industrial cities, transportation, utility projects, and logistics facilities, are in high demand.
- Saudi Arabia's infrastructure business is rebounding due to increased infrastructure spending and the continuance of government payments to contractors. Several transportation projects, including the Makkah Metro, the Riyadh Metro, and the King Abdul-Aziz International Airport Expansion, are also underway throughout the kingdom.
- Furthermore, the high gloss surface and availability of sanitary ware in various color options in the country are likely to drive revenue-generation opportunities in the ceramic sanitary ware industry in the coming years.
- A large proportion of businesses prefer technologically advanced and convenient products. Manufacturers are researching and developing intelligent ceramic sanitary ware products with 3D technology, such as water closets that offer integrated personal cleansing to create cleanliness that toilet tissue alone cannot match. During the forecast period, this is expected to drive the overall growth of the ceramic sanitary ware market.
- All these variables are projected to generate attractive growth prospects for the nation's ceramic sanitary ware industry in the approaching years.

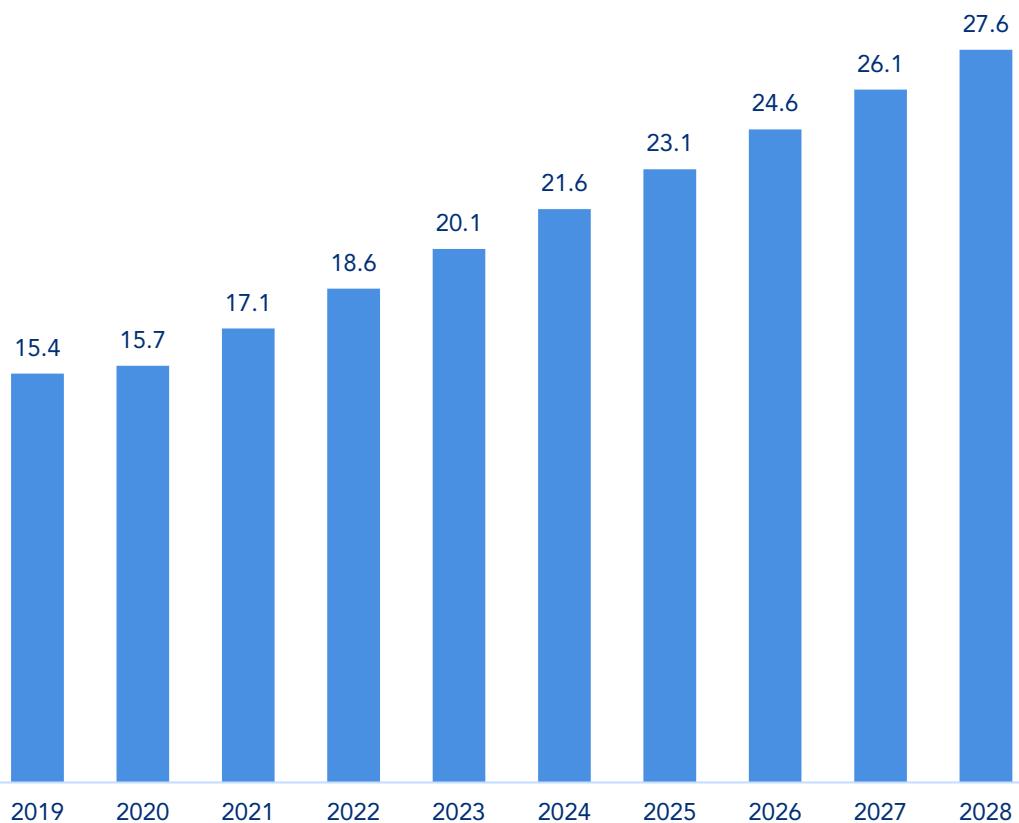
Source: Mordor Intelligence



5.2.2 METAL

SANITARYWARE MARKET, REVENUE IN USD MILLION, METAL, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.8%



- The metal segment of the market was valued at USD 18.6 million in 2022 and is expected to reach USD 27.6 million in 2028, registering a CAGR of 6.8% for the period (2022-2028).
- The metal sanitaryware market is attributed to significant growth in the forecast period. The rising demand for metal faucets, showers, floor drains, and toilet paper holders will propel the market growth.
- Rising demand for high-quality bathroom accessories and solutions is expected to boost adoption. An increase in building activities related to residential and commercial infrastructures is projected to enter the picture and expand the product market's growing scope.
- Concerns about personal hygiene and cleanliness are growing among the population, which is predicted to benefit the product market's growth.
- Furthermore, initiatives are being taken by the government of Saudi Arabia to usher in the era of urbanization, which is expected to be a growth proliferator for the market in the future and provide potential stakeholders with momentum to expand business development in the product market.
- The creation and growth of economic commerce have had a tremendous influence on conventional economic and trade activities, increasing the vitality of Saudi Arabia's economy and changing people's traditional methods of working and thinking. Cost control is the most important component in any Sanitary Metal Ware company to maximize profits.
- Rebon International is a major manufacturer and supplier of locks and hardware in domestic and international markets. Rebon International (headquartered in Aligarh and Saudi Arabia) began producing and distributing mortise locks, mortise handles, door fittings, padlocks, designer curtain brackets, and other related products. The firm has in-house design, development, and production capabilities.

Source: Mordor Intelligence



5.2.2 METAL



- The durability of metal sanitary ware products is driving the market growth. It is a durable substance, and its components make it resistant to corrosion and stains. This makes it ideal for bathroom items like soap holders that get wet often.
- The stylish looks of the metal sanitaryware fuel the market growth. Stainless steel's gleaming, sophisticated appearance will complement any bathroom. If properly cared for, stainless steel bathroom accessories will remain clean and shiny, making one's bathroom appear more sanitary. No other material can compete with its visually attractive appearance, and the guests will be pleased by the beautiful stainless steel towel racks and toiletry containers.
- The ability to recycle metal sanitary ware is impacting great productivity. The government also encourages using metal sanitary ware in new construction and renovation.
- In Saudi Arabia, the use of metal sanitary ware is increasing exponentially. This is due to increased demand from an increasing number of independent families and increased development activity in the commercial and hotel sectors.
- The commercial sector in the country, which is on a development trajectory, is likely to gain expansion across the area and to present prospects to the product market to acquire significant growth potential in the future with the ever-expanding scope for export and import trade.
- The market for hygienic metal sanitaryware is predicted to grow dramatically in the future. This is because of the widespread use of hygienic metal sanitary ware, advancements in bathroom accessories, and a move toward modern bathroom décor.
- Due to a growth in consumer disposable income and lifestyle changes, Saudi Arabia makers of sanitary metal wear are witnessing increasing demand for their goods. Furthermore, high-income customers purchase hygienic metal ware items to demonstrate their wealthy lives, which is expected to increase demand for high-end sanitary metalware.

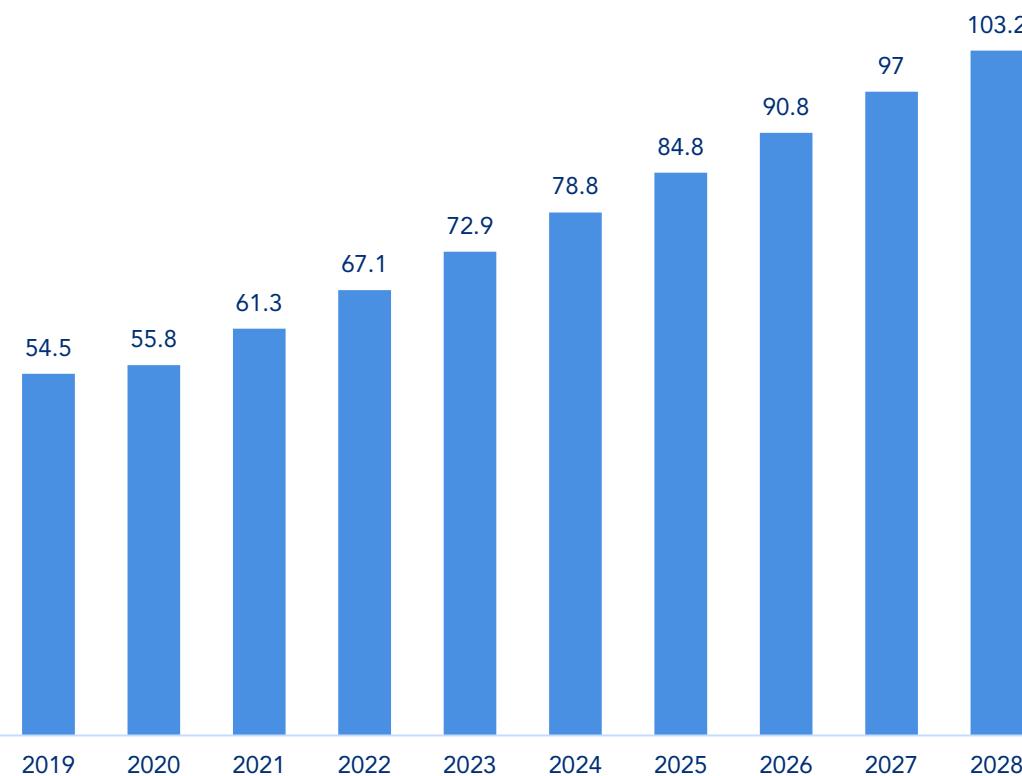
Source: Mordor Intelligence



5.2.3 PLASTIC

SANITARYWARE MARKET, REVENUE IN USD MILLION, PLASTIC, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 7.4%



- The plastic segment of the market was valued at USD 67.1 million in 2022 and is expected to reach USD 103.2 million in 2028, registering a CAGR of 7.4% (2022-2028).
- The country's demand for sanitary goods comprised of plastic materials is driven by increased residential construction activities and investment in infrastructure development.
- Additionally, several government programs, including Vision 2030, have raised industrial investment in water supply projects, further boosting this market's expansion.
- another factor driving product demand in all end-use industries, including the home, commercial, and hospitality, is people's growing worries about hygiene due to increasing awareness of health risks.
- Manufacturers are also emphasizing the introduction of sophisticated features like temperature control systems, moisture sensors, and touchless operations, which enable optimal use of water resources while simultaneously bringing convenience to users. This element is projected to present considerable prospects for market participants working in this industry in the upcoming years.

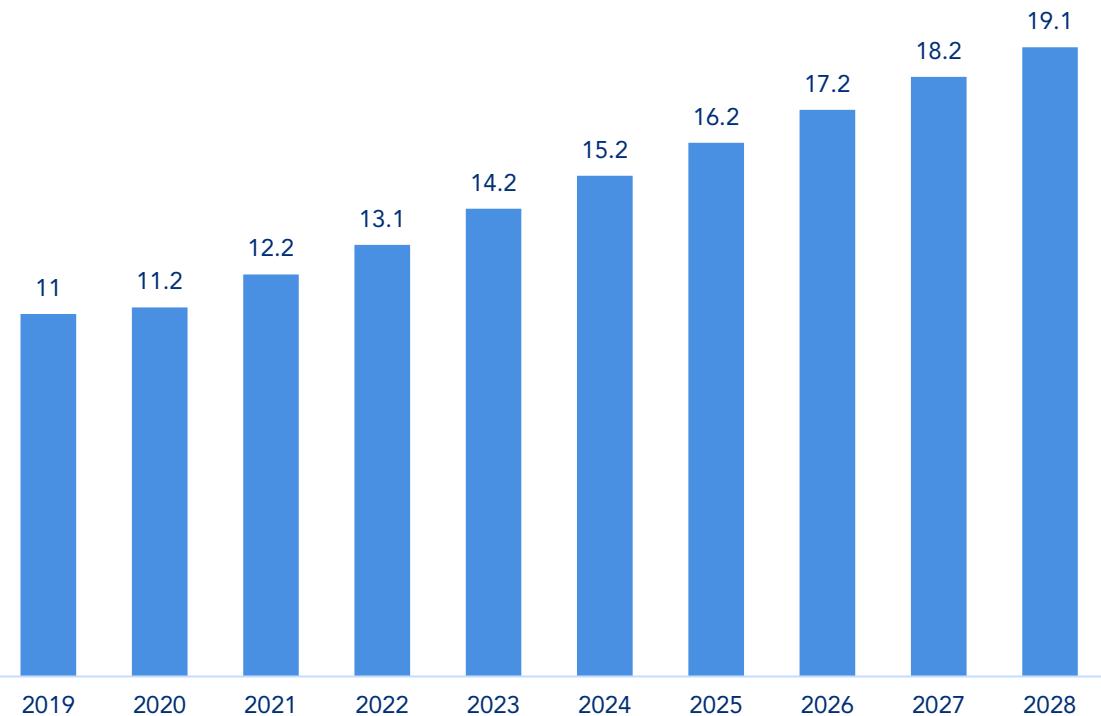


Source: Mordor Intelligence

5.2.4 OTHER MATERIALS

SANITARYWARE MARKET, REVENUE IN USD MILLION, OTHER MATERIALS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.5%



Source: Mordor Intelligence

- The other materials segment of the market was valued at USD 13.1 million in 2022 and is expected to reach USD 19.1 million in 2028, registering a CAGR of 6.5% for the period (2022-2028).
- Other metals include glass, marble, clay, feldspar, and quartz metal used to produce sanitary ware products.
- The market is comparatively smaller as compared to the ceramic sanitary ware market.
- Though the lowly bathroom was classified as an inconsequential place during interior design, it is now one of the most essential rooms in the house, bringing relaxation and comfort like no other. This is likely why interior designers and architects focus more on what enters this room.
- The rise in average family wealth has resulted in a lifestyle change, with individuals becoming more sophisticated and preferring high-end luxury items such as marble and quartz sanitary ware.
- People are turning away from traditional closets and toward stylish wall-mounted European closets, as well as away from pedestal basins and toward slim-edged over-the-counter basins that are more contemporary in appearance. The shift in trends is also due to the fact that they are easier to maintain and consume less water, and the latest narrow-rim designs are more space-efficient and elegant.
- Improved sanitation, higher hygiene expenditure, changing lifestyles, and a more structured real estate sector are increasing demand for lifestyle items such as private spas, exotic shower systems, saunas, and bigger bathtubs.



5.2.4 OTHER MATERIALS



- Smart bathrooms partly drive the growth in demand for glass sanitary in GCC nations. These are visually appealing, inventive, and simple to use. These also aid in the adoption of a healthy lifestyle. Smart bathrooms may be controlled by voice and include modern features such as heated toilet seats, sensor faucets, and sensor soap dispensers.
- The fast development in urbanization is a primary element driving the growth of the GCC glass sanitary market. The increase in population leads to the expansion of infrastructures such as residential housing and construction, corporate offices, hospitals, educational facilities, and other commercial projects, which influences the need for glass sanitary ware.
- Glass sanitaryware is becoming more popular since it has an appealing look and unique features, such as embedded sensors. Consumers will be able to adjust the water temperature in digital faucets or showers, as well as bathroom lighting and music, with the assistance of smart bathroom and touchless technology. Such advancements are expected to fuel the expansion of the glass sanitary ware market.
- To address client demands, Al Qfari and a group of partners built a unique showroom for Hatch Sanitary, making it the first Hatch Sanitary showroom in the central area. Hatch Sanitary aims to deliver luxury sanitary ware solutions and supplies sourced from companies such as the Alpha Factory and the Geberit Factory.
- SARA Group is the largest distributor of luxury bathroom goods, high-quality tiles, excellent hospitality equipment, exquisitely designed dinnerware, gift items, and home accessories in Saudi Arabia.
- The company produces different types of sanitary ware products, mainly ceramics, glass, and other metals.
- Maison Valentina created another such idea. Maison Valentina provides luxury and modern bathroom furniture produced in Portugal from unique materials that create moments of calm relaxation. These are in high demand in Saudi Arabia.

Source: Mordor Intelligence





5.3 BY END USER

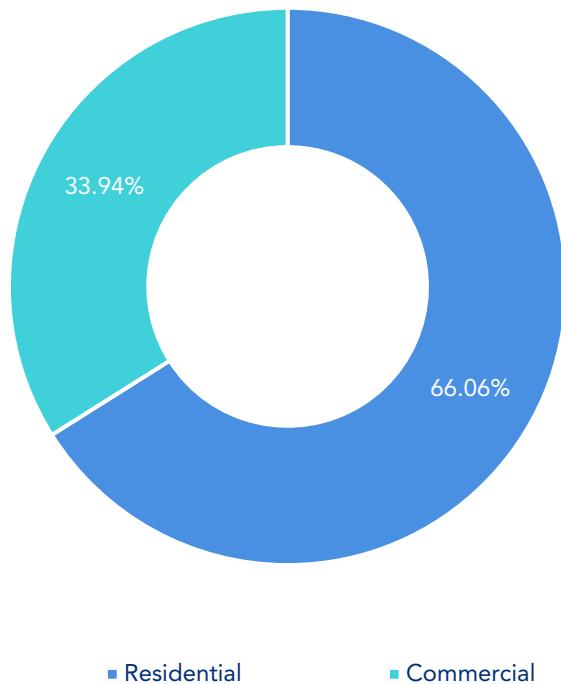
5.3.1 Residential

5.3.2 Commercial



5.3 MARKET SEGMENTATION – BY END USER

SANITARYWARE MARKET, MARKET SHARE (%) , BY END USER, SAUDI ARABIA, 2022



SANITARYWARE MARKET, REVENUE IN USD MILLION, BY END USER, SAUDI ARABIA, 2019-2028

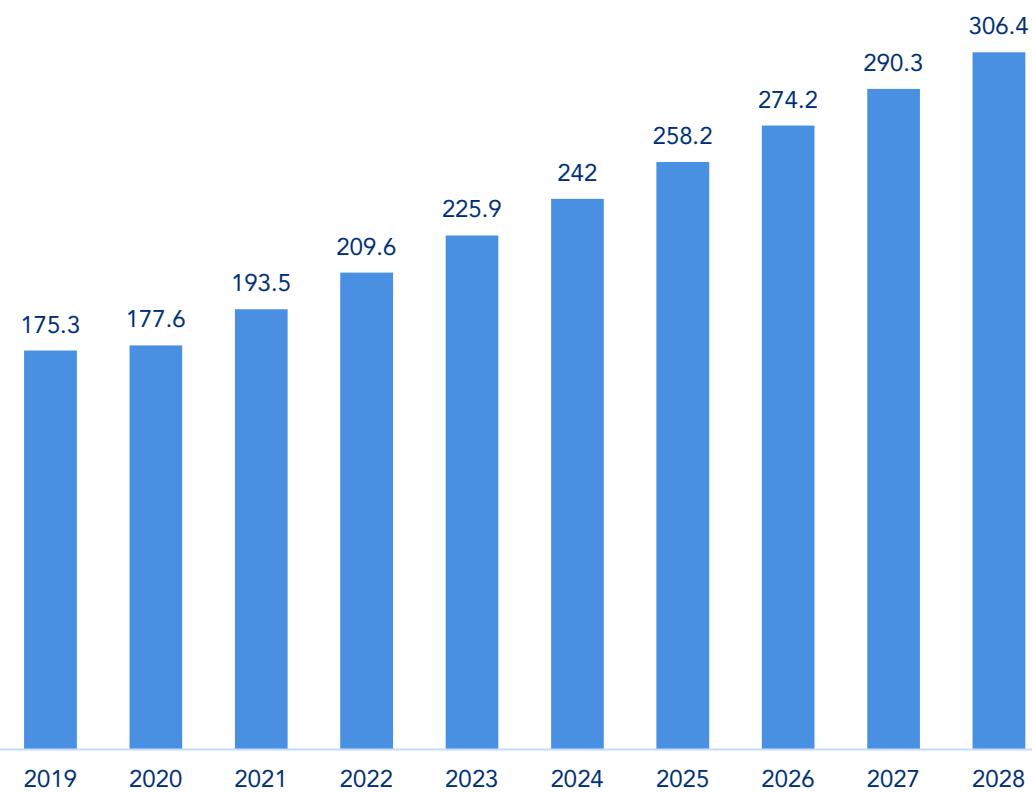
End User	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (%) (2022-2028)
Residential	175.3	177.6	193.5	209.6	225.9	242.0	258.2	274.2	290.3	306.4	6.5%
Commercial	92.3	92.8	100.2	107.7	115.0	122.2	129.3	136.1	142.9	149.5	5.6%

Source: Mordor Intelligence

5.3.1 RESIDENTIAL

SANITARYWARE MARKET, REVENUE IN USD MILLION, RESIDENTIAL, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.5%



Source: Mordor Intelligence

- The residential segment of the market was valued at USD 209.6 million in 2022 and is expected to reach USD 306.4 million in 2028, registering a CAGR of 6.5% for the period (2022-2028).
- The residential sector in Saudi Arabia experience a boom, in line with the 2030 ambition of increasing homeownership rates to 70%. In Saudi Arabia's biggest cities, the number and value of residential sales surged considerably. A rise in mortgage uptake, with 26,800 new contracts reported in February 2021, underpins the remarkable growth in the number and value of residential transactions.
- Total housing stock is expected to rise in all major cities in Saudi Arabia, with Jeddah's supply focusing on middle-income housing and DMA's future supply mainly consisting of high-quality flats and townhouses. Many residential users prefer innovative sanitaryware products in home toilets for better design, aesthetics, and optimum utilization of space. Thus, the residential user segment contributes most of the market share.
- Rapid urbanization, increasing disposable income, increasing number of nuclear families, and increasing household spending are significant driving factors in the residential segment of the market.
- Also, the increasing number of renovation activities among residential users in Saudi Arabia propel the demand for sanitaryware products.
- Water scarcity in Saudi Arabia is significant. The citizens of KSA and the government take many initiatives to save water. Sanitaryware manufacturers innovate products, such as cisterns, to save water. Residential users majorly prefer these water-saving innovative sanitaryware products. Thus, the demand for innovative sanitaryware products, such as cisterns specifically designed for residential users, is expected to increase.
- Modern infrastructure facilities necessitate installing products such as bathroom basins, bathroom vanities, and others in residential buildings during construction. Increased urbanization increases building construction for residential or commercial purposes, which drives the market for sanitaryware products.



5.3.1 RESIDENTIAL



Source: Mordor Intelligence

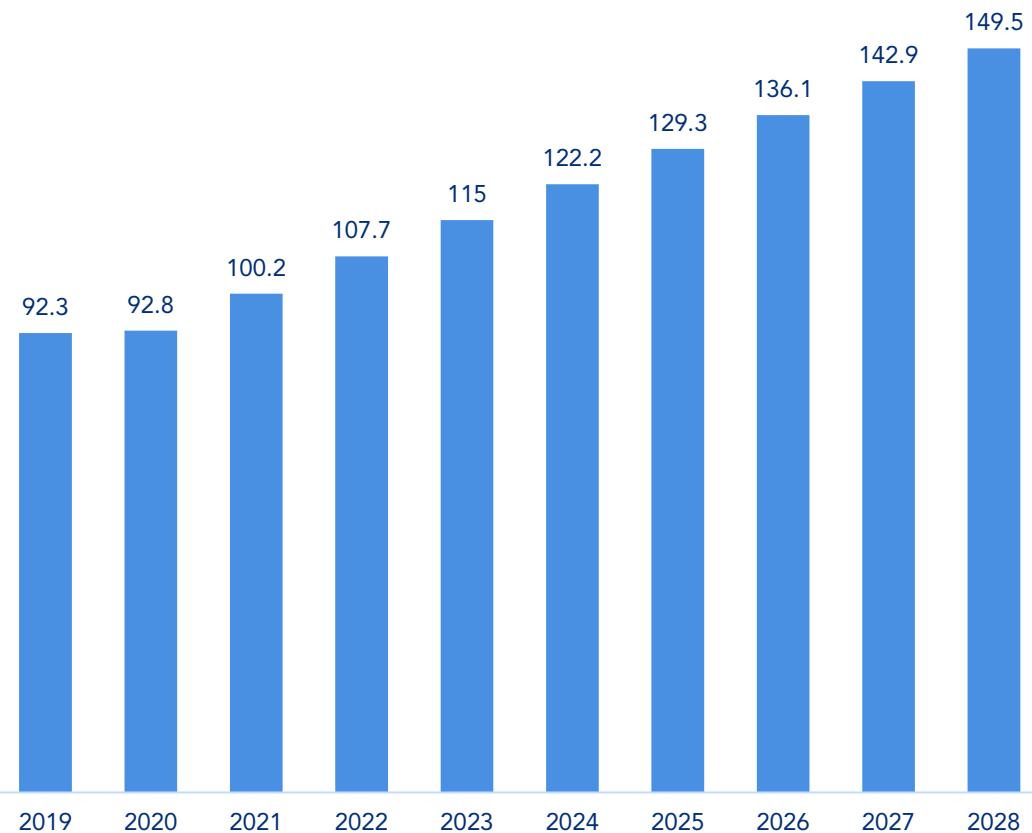
- Affordable housing is for the masses, where the end customer is satisfied with the basic amenities and thus is neither picky nor concerned about brand value. However, the aspirational and ultra-luxury segments account for a sizable portion of the market. Because these customers are aware of the various brands available, the residential space must strive to offer the best brands.
- The desire to adorn homes with cutting-edge sanitary ware fittings is growing, as the country now has a more organized bathroom solutions market with a diverse range of options from even the top international brands.
- Users prefer luxury sanitary ware because of its durability, high resistance to environmental conditions, and low overall maintenance. Regarding luxury sanitary ware, studies show that people prefer to buy luxury residential bathroom fittings, particularly ceramic stone ones.
- The luxury sanitary market is unique in that demand is primarily stable and consistent throughout Saudi Arabia.
- People nowadays expect customization in their apartments, and most developers build marquee luxury projects with the flexibility to increase or decrease the size of the bathrooms as needed. The purchase of sanitary ware varies depending on the product. International designer brands such as Villeroy & Boch, Grohe, and Roka are preferred options for the luxury segment, while new-age compact home buyers prefer best-in-class brands.
- The rising sanitary ware market can be attributed to the growth of the hospitality industry and increasing urbanization, which has allowed various multinational corporations to enter this industry.
- The sanitary ware market in Saudi Arabia is primarily driven by imports, with only a few players operating manufacturing units in the country. The growing number of housing and commercial projects, particularly in Riyadh and Makkah, combined with favorable government initiatives to support affordable housing through tax breaks and easy financing schemes, are expected to boost sanitary ware sales in the country over the next five years.
- Aside from rising domestic demand, there is a significant opportunity to export to neighboring GCC and African countries, net sanitary ware importers.



5.3.2 COMMERCIAL

SANITARYWARE MARKET, REVENUE IN USD MILLION, COMMERCIAL, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 5.6%



Source: Mordor Intelligence

- The commercial segment of the market was valued at USD 107.7 million in 2022 and is expected to reach USD 149.5 million in 2028, registering a CAGR of 5.6% for the period (2022-2028).
- This expansion of commercial space over the last few decades has the potential to usher in a new paradigm for the sanitaryware market.
- Changing demographics, such as an aging population and increased urbanization, which means more people living in smaller spaces and a greater need for public spaces to socialize and congregate, contribute to the change.
- Malls provide a welcome watering hole in this environment, especially in cities with unsafe public spaces.
- The increased population of foreign citizens in Saudi Arabia has one of the world's biggest airports, malls, and hotels. The use of sanitization has become an extremely important thing.
- As the number of commercial malls is increasing in Saudi Arabia, the rise in demand for sanitary ware is also increasing exponentially.
- The sanitary ware in a bathroom is an extremely important component. People are concerned about hygiene because toilets are used frequently in hotels or offices. It is necessary to have clean toilet seats, pans, and urinals.
- As the number of people in commercial space is more, the need for cleaning sanitaryware space becomes ubiquitously important. With rising technological innovations, electronic flushing systems are increasing in commercial spaces, mainly malls and offices.
- automatic or sensor technology sanitary ware is becoming a hot trend for commercial real estate purchases. Commercial real estate looks for available space before deciding on a WC type, whether wall-hung or floor-mounted.



5.3.2 COMMERCIAL



- The selection of sanitaryware and fittings for healthcare use can mean the difference between life and death. Literally. The media, patients, and hospital trusts are all concerned about the resurgence of cross-infection in hospitals.
- Bathroom sizes have shrunk, and colors are increasingly used on wall surfaces. The placement of restrooms in a healthcare facility has shifted from the exterior to the interior.
- The most noticeable change is the addition of a sunken slab in the restroom. The use of waterless urinals is also becoming more popular. Hand dryers and other restroom amenities are beginning to appear in public restrooms. They have yet to detect patient toilets in healthcare facilities.
- The rising number of schools and universities is also giving potential growth to the sanitary ware market.
- Increased demand for sanitary ware and accessories equipped with advanced technologies and changing human lifestyles, particularly in developing economies, are the major factors driving the market growth.
- Rising construction of smart bathrooms equipped with the latest technologies, rising concerns and awareness about hygiene and health, and growing brand awareness will all create lucrative growth opportunities for the market.
- The increasing number of celebrity endorsements, rising penetration of e-commerce platforms, rising awareness and consciousness about the importance of conserving energy and water, and the increasing focus of major manufacturers on technological advancements are all important factors driving the market growth.
- Anti-bacterial coatings are a rising trend in the sanitary ware market, as public toilets are prone to bacterial infections. Companies like Jaquar and RAK Ceramics use this technology in Saudi Arabia to manufacture commercial sanitary ware such as toilet seats and wash basins.

Source: Mordor Intelligence





5.4 BY DISTRIBUTION CHANNEL

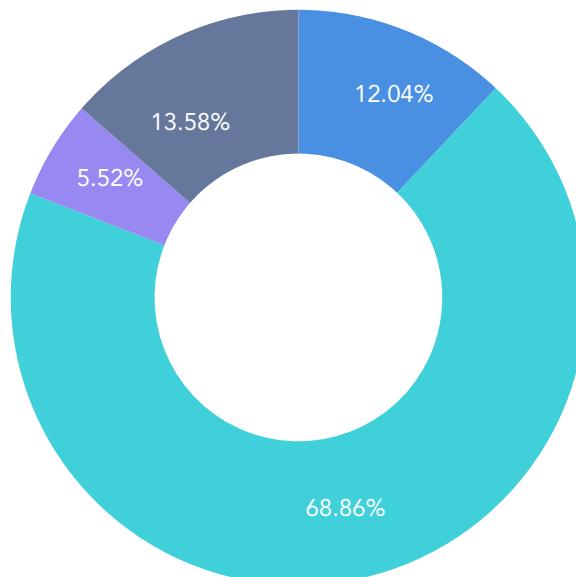
- 5.4.1 Home Centers
- 5.4.2 Specialty Stores
- 5.4.3 Online Stores
- 5.4.4 Other Distribution Channel





5.4 BY DISTRIBUTION CHANNEL

SANITARYWARE MARKET, MARKET SHARE (%) , BY DISTRIBUTION CHANNEL, SAUDI ARABIA, 2022



- Home Centers
- Specialty Stores
- Online Stores
- Other Distribution Channel

SANITARYWARE MARKET, VALUE IN USD MILLION, BY DISTRIBUTION CHANNEL, SAUDI ARABIA, 2019-2028

Distribution Channel	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (%) (2022-2028)
Home Centers	31.4	32.3	35.2	38.2	41.3	44.3	47.3	50.3	53.3	56.4	6.7%
Specialty Stores	189.4	187.7	203.1	218.5	233.7	248.7	263.4	277.8	292.0	306.1	5.8%
Online Stores	10.1	13.5	15.4	17.5	19.9	22.4	25.1	28.0	31.1	34.5	11.9%
Other Distribution Channel	36.7	36.9	40.0	43.1	46.1	48.9	51.7	54.3	56.7	59.0	5.4%

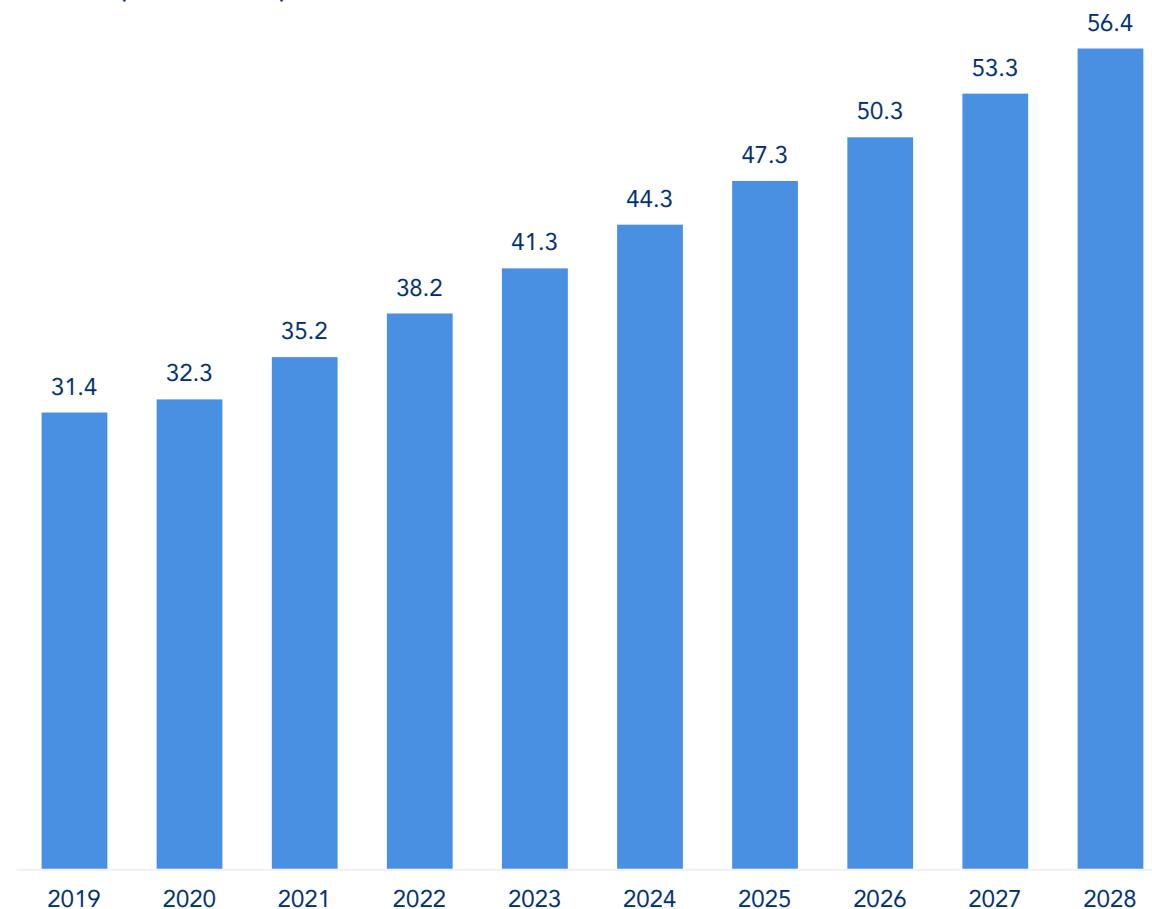
Source: Mordor Intelligence



5.4.1 HOME CENTERS

SANITARYWARE MARKET, VALUE IN USD MILLION, HOME CENTERS, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 6.7%



- The home centers segment of the market was valued at USD 38.2 million in 2022, and it is expected to reach USD 56.4 million for the year 2028, registering a CAGR of 6.7% for the period (2022-2028).
- Businesses that sell a variety of home improvement and sanitaryware products, such as toilets, washbasins, bidets, urinals, and different sinks, are included in the home center and hardware store industry.
- Distributors for home center stores work as a middleman between buyers and sellers. Businesses purchase products in bulk from several manufacturers and then resell them to customers in smaller amounts. Customers can buy goods from a range of producers as a result.
- Real estate investors, plumbers, and contractors are the primary consumers of home centers. Physical retailing and home centers for sanitary equipment were severely hit due to COVID-19 and the national shutdown.
- Small and medium players, on the other hand, who are limited to small areas, were forced to close their doors due to the abrupt shift. These players have suffered massive losses, and many have had to close their doors.
- But as the lockdown was lifted and the WFH environment rose, the requirement for luxury sanitary ware rose exponentially in the Kingdom.
- Home centers have chances to offer value to the sanitaryware industry due to the increasing number of bathroom remodeling projects undertaken in residential apartments.
- The home centers market for sanitaryware items is fueled by the presence of foreign competitors and various imported brands of sanitaryware in the Kingdom.

Source: Mordor Intelligence



5.4.1 HOME CENTERS



- Creating a network of home centers has additional benefits, such as enhancing customer satisfaction and feedback, accelerating growth, improving marketing effectiveness, and better understanding consumer and product preferences.
- In a world where reputable brands compete for consumers' attention, home-based businesses provide refreshing alternatives.
- In the Middle East, including Saudi Arabia, family-run businesses are frequently conglomerates with exclusive licenses to manage retail, real estate, and hospitality chains.
- On the other end, the need to foster small businesses and the entrepreneurial spirit required to build and grow them is now recognized in the region, particularly by countries seeking to reduce their reliance on oil and petroleum.
- In most countries, licensing regulations differ for nationals and expatriates. The Saudi Vision 2030 Blueprint recognizes SMEs' bureaucratic challenges regarding laws and regulations, access to financing, and administrative procedures.
- The kingdom focuses on cultivating a start-up culture to increase SME contribution to GDP from 20% to 35% and women's workforce participation from 22% to 30%.
- **Increasing housing projects such as Neom:** The Line, Alnara City, DP World, and Jawahar Al-Khobar Mall demand luxury sanitaryware products. Home centers are an excellent option for selling sanitaryware products in this project.
- The government is also supporting small businesses, such as home centers, to encourage start-up culture in the Middle East.
- Small businesses must build strong communities of patrons who will encourage and remain loyal to the values represented in their products or services to thrive. It also helps a lot to develop relationships with other entrepreneurs.

Source: Mordor Intelligence

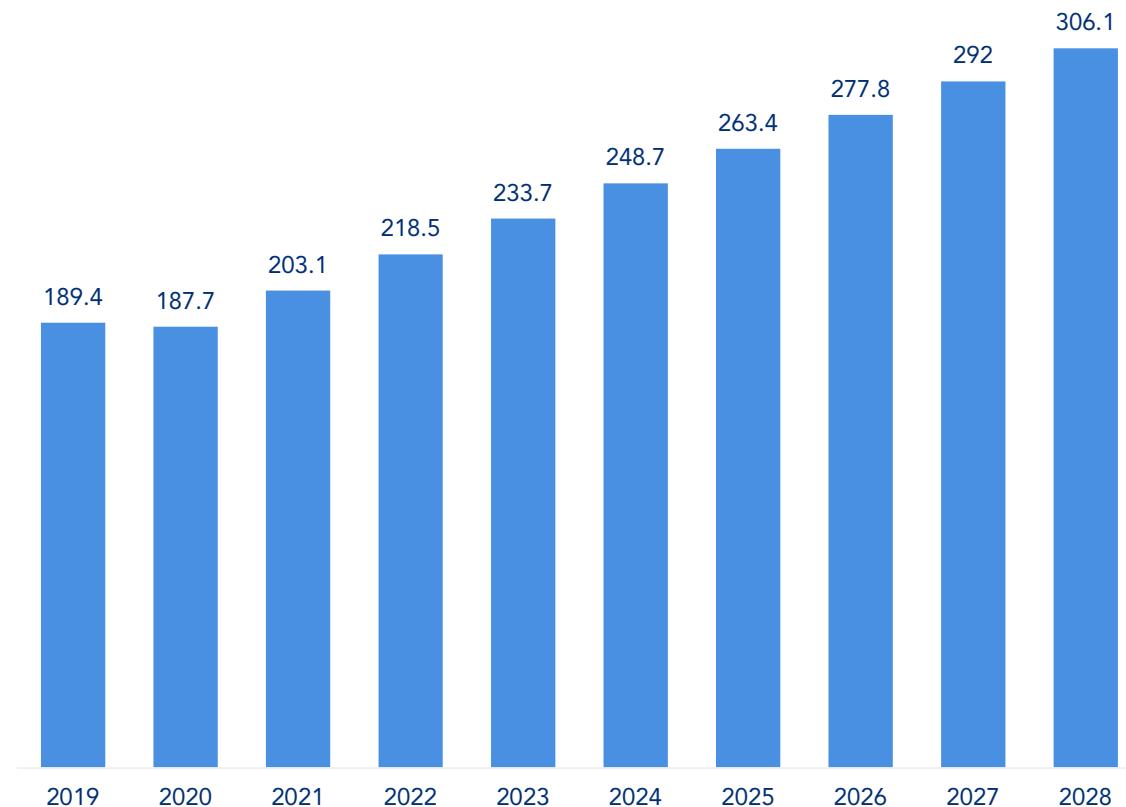




5.4.2 SPECIALTY STORES

SANITARYWARE MARKET, VALUE IN USD MILLION, SPECIALTY STORES, SAUDI ARABIA, 2019-2028

CAGR (2022-2028): 5.8%



- The specialty store segment of the market was valued at USD 218.5 million in 2022, and it is expected to reach USD 306.1 million for the year 2028, registering a CAGR of 5.8% for the period (2022-2028)
- A company that sells a single item or a small selection of items is known as a specialty store. Retail establishments that specialize in particular product categories are frequently called specialty stores. Specialty shops can also carry a broad selection of goods, but only within a single category. Specialty stores can be categorized as small retail shops, big-box chains, or locally owned businesses.
- In the past ten years, numerous worldwide brands, including Rak Ceramics, Kohler, H&R Johnson, and Roca, have opened chain stores. In Saudi Arabia, specialty stores sell products from imported premium sanitaryware brands.
- Sanitaryware retailing has advanced significantly over the years and now includes technology centers and certified fitters who are also a source of market knowledge for merchants.
- Specialty retailers see more foot traffic in the offline sector. One will choose specialty brand stores over any hardware stores regarding customer service.
- The young generation's population is growing, as is their knowledge of branded goods. As a result, specialty shops are increasingly drawing customers to buy branded sanitaryware.
- The specialty store, along with other retailers, need to maintain good relations with the plumbing workers as they are the one to send customers to the shop. Retail consumers believe in the local plumber's suggestions for sanitaryware products, so maintaining a favorable relationship with the local plumber may lead to increased sales.

Source: Mordor Intelligence





5.4.2 SPECIALTY STORES

- Al Ghamdi Co. started conducting business in 1970. It is one of the top businesses in the Kingdom of Saudi Arabia that deals in sanitary ware fixtures, fittings, and accessories. It has a great reputation with customers and is also well-known for its after-sale customer support.
- The world's major producers of residential, commercial, and institutional sanitary ware fixtures, fittings, and accessories, American Standard/Ideal Standard and Bobrick, are represented only and exclusively in the Kingdom by Al Ghamdi Co.
- Al Ghamdi offers products ranging from the most exquisite and opulent stainless steel accessories, vitreous China fixtures, handsome acrylic bathtubs/Whirlpools, to a standard bathroom, all made with excellent craftsmanship and a variety of today's most popular colors.
- It has its head office in Riyadh and branch offices in Jeddah and Dammam.



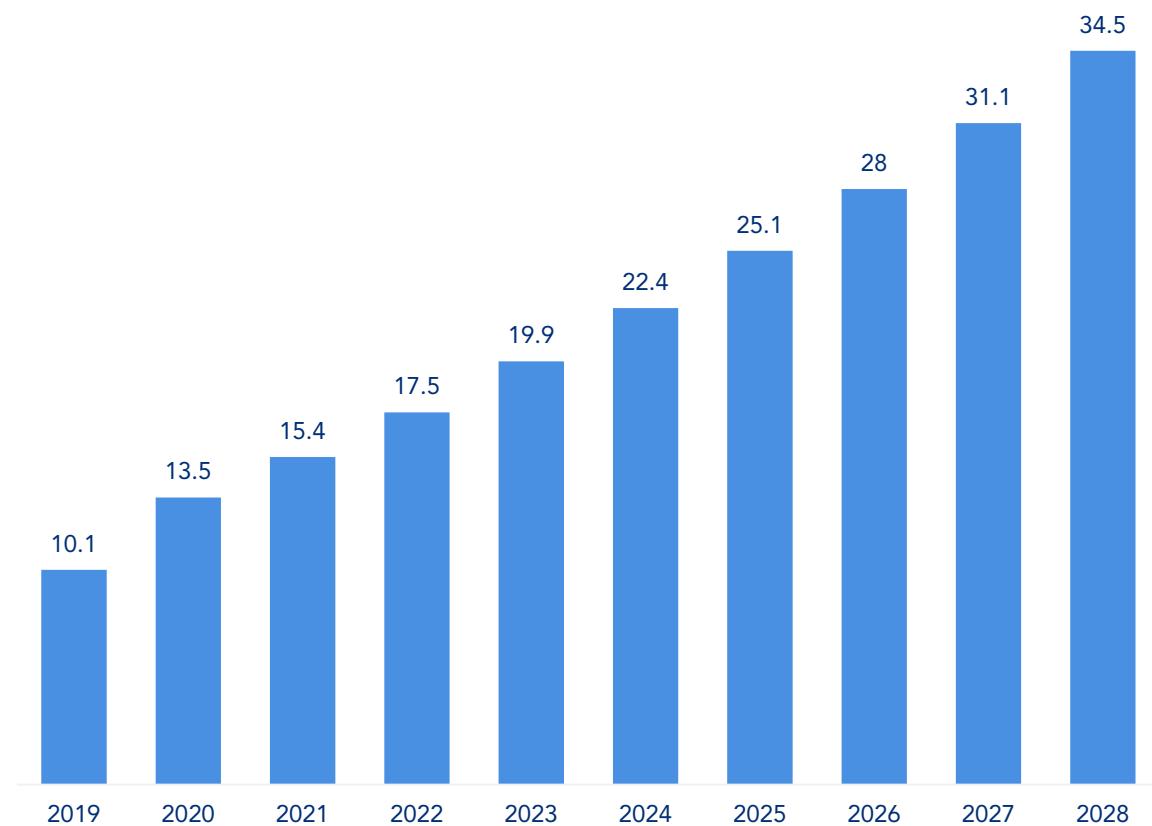
- M M Al Dossary Stores was founded in 1950 and had more than 60 years of sanitary wares and tiles expertise. The business's management team has operated under strict criteria that guarantee the finest quality goods and services are delivered to Stores customers throughout the Kingdom. In addition to dealing with the greatest products, M M Al Dossary Stores is fully committed to fair, honest, and ethical practices with our esteemed principals and loyal customers.
- The Stores have expanded throughout the years almost completely to cover all of Saudi Arabia's major regions. Dammam in the Eastern Province served as the starting point for the success story, and from there, it spread to Riyadh, Jeddah, Al-Qassim, Al-Ahsa, Jubail, and Khobar. The extensive product selection offered by M M Al Dossary Stores has expanded, particularly in sanitary ware, floor and wall tiles. Many renowned factories abroad have The Stores on their list of authorized dealers.



5.4.3 ONLINE STORES

SANITARYWARE MARKET, VALUE IN USD MILLION, ONLINE STORES, SAUDI ARABIA, 2019-2028

CAGR (2022 TO 2028): 11.9%



- The online store segment of the market was valued at USD 17.5 million in 2022, and it is expected to reach USD 34.5 million in 2028, registering a CAGR of 11.9% for the period (2022-2028).
- Saudi Arabia's sanitaryware markets are fast changing as a result of favorable demographics, e-commerce, rising household incomes, and a rise in consumerism.
- Saudi Arabia has made considerable recent investments in 5G mobile networks. With this next-generation wireless network, more devices can be connected while preserving performance, and quicker speeds and lower network latency are all promised. Internet and smartphone use is becoming more widespread in the Kingdom. This will increase Saudi Arabia's online sales of sanitaryware.
- The use of big data and IoT technologies in the internet space is another significant technology trend in Saudi Arabia. On the basis of customers' past purchases and product preferences, large retailers are utilizing sensors to tailor the shopping experience for customers using smartphones, offer cross-selling suggestions, and send out notifications when a product is available.
- The fourth industrial revolution, often known as Industry 4.0, is characterized by new technologies that obfuscate the line between the physical and digital worlds and enable real-time access to both new and existing data sources. This data access profoundly alters how firms function when coupled with potent analytics tools like visualization, scenario analysis, and predictive learning algorithms.
- Customers are increasingly turning to online channels for their sanitaryware purchases due to factors such as home delivery, the convenience it offers, and faster delivery techniques, including last-mile delivery and same-day or 1-2-day deliveries.

Source: Mordor Intelligence



5.4.3 ONLINE STORES



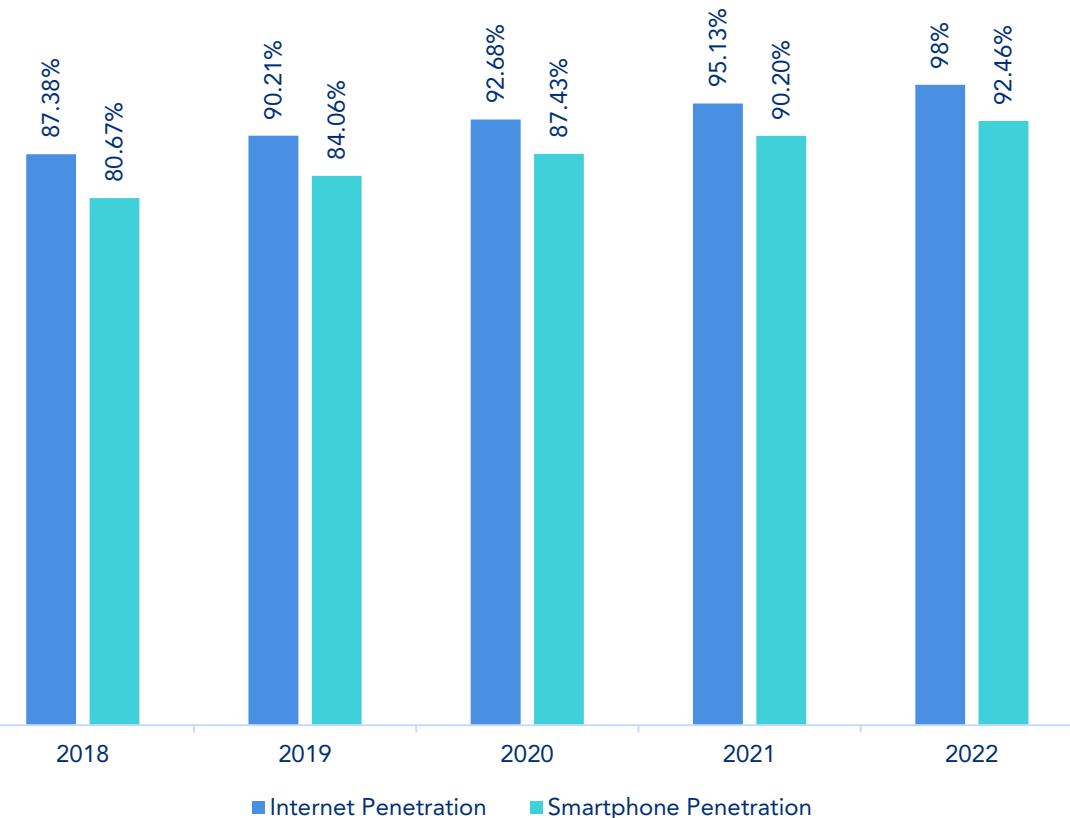
- Although the online sale of sanitaryware is increasing, many people still prefer to buy large-ticket sanitaryware through the physical store. Retail consumers still go for the retail store, consult about the merits and demerits of the product with the expertise there, and feel the product themselves, so people still visit a physical store and have some reservations about the effectiveness of the product while ordering online.
- When there was a pandemic and all physical stores were shut due to the lockdown, online sanitaryware sales skyrocketed. Numerous sanitaryware businesses with physical presence have started developing digital strategies for the future because they believe that the momentum of online purchasing will persist even after the COVID-19 pandemic.
- Customers' inquiries and online visits to sanitaryware manufacturers' and merchants' websites have significantly increased due to the expanding internet penetration and smartphone usage. Implementing a hybrid sales approach that mixes offline and online sales is, therefore, highly sought after by many firms.
- The market's major companies are switching to an omnichannel strategy in response to the rising demand for online channels to extend the cohabitation of physical stores and websites and achieve a competitive edge.

Source: Mordor Intelligence

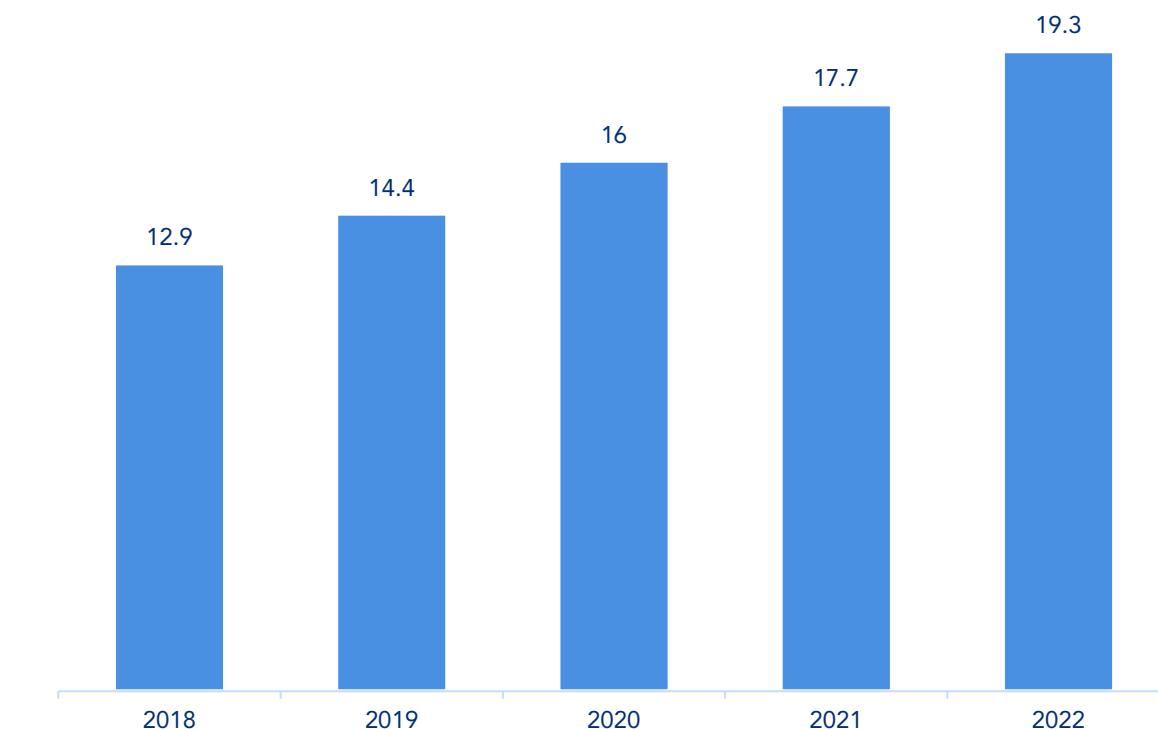


5.4.3 ONLINE STORES

SMARTPHONE AND INTERNET PENETRATION IN SAUDI ARABIA, IN PERCENTAGE, FOR YEAR 2018-2022



NUMBER OF ONLINE SHOPPERS IN SAUDI ARABIA, FOR YEAR 2018-2022, IN MILLIONS

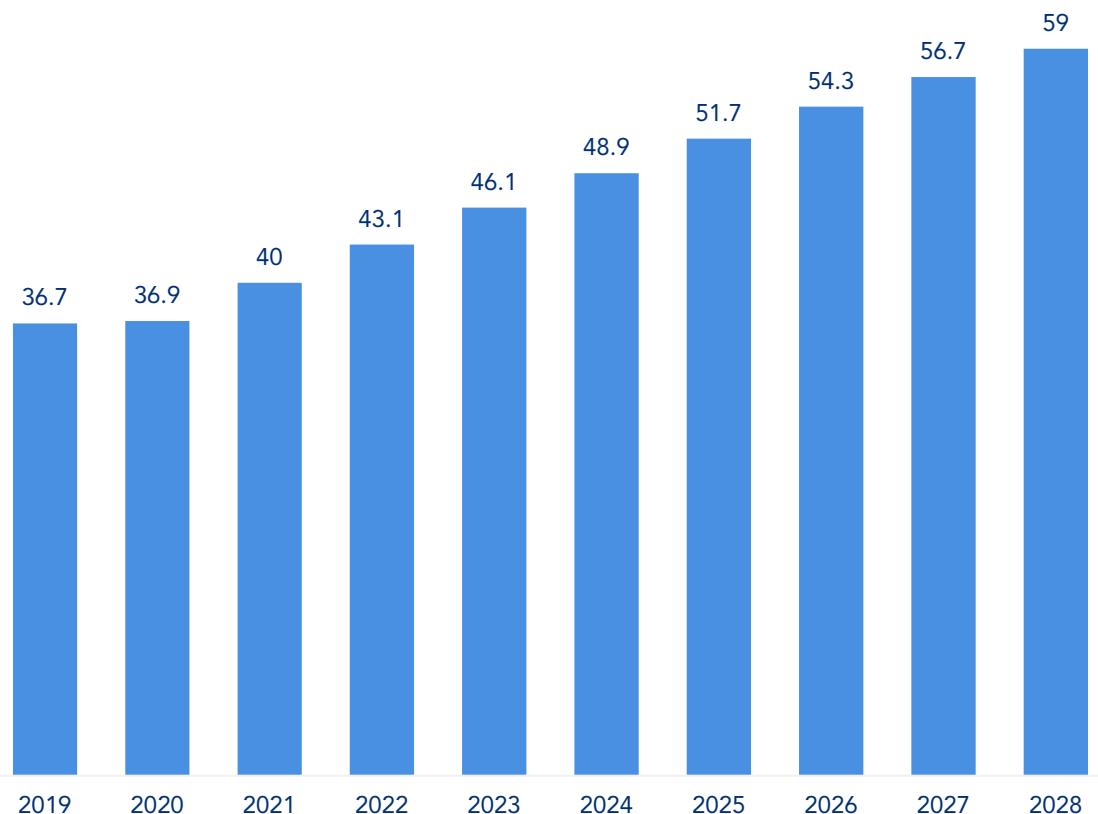


Source: Statista Digital Market Outlook

5.4.4 OTHER DISTRIBUTION CHANNELS

SANITARYWARE MARKET, VALUE IN USD MILLION, OTHER DISTRIBUTION CHANNEL, SAUDI ARABIA, 2019-2028

CAGR (2022 TO 2028): 5.4%

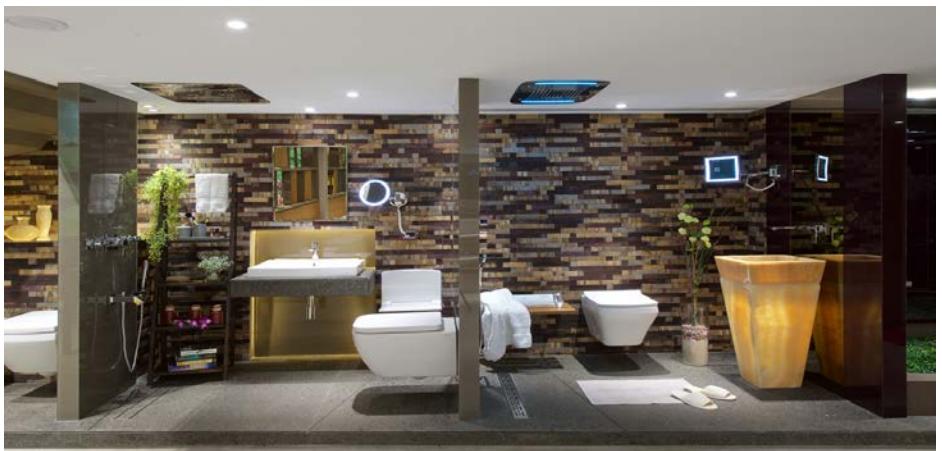


Source: Mordor Intelligence

- The other distribution channel segment of the market was valued at USD 43.1 million in 2022. It is expected to reach USD 59 million for the year 2028, registering a CAGR of 5.4% for the period (2022-2028).
- Non-specialty retailers, manufacturers, small chain stores that sell sanitaryware directly, and discount stores can be classified as other distribution channels.
- Luxury shops are playing a bigger role in sales and distribution as demand for high-end sanitaryware increases in Saudi Arabia Market.
- The segment has surmounted all growth-related issues with the growth in luxurious sanitaryware and bathing. Due to the rise in luxury category products, customers are requesting more high-end and high-tech bathroom products.
- There are a ton of unstructured market chances for the expanding market. Unorganized players are increasingly prevalent in the GCC region, including Saudi Arabia. As a result, non-specialty shops are also in demand to sell sanitaryware items.
- Small business owners in Saudi Arabia must immediately and urgently arm themselves with management and tactical skills in order to maintain their competitiveness as a result of the increased challenges that globalization has placed on small enterprises in many nations. Because of e-commerce and market globalization, everything has altered.
- Young people all over the world are using social media more and more because of its appealing sanitaryware designs. Many merchants utilize digital advertising on Facebook and Instagram to market their goods and inform consumers about recent product introductions and popular brands.



5.4.4 OTHER DISTRIBUTION CHANNELS



- Most people in Saudi Arabia, especially in regions such as Makkah and Jeddah, prefer to buy from various outlets and vendors/retailers in the same area based on their convenience, preference, and selection.
- Consumers' rising expectations and preferences are changing the sanitaryware (Bathroom Accessories, Mixers, Bathtub) business.
- The demand for housing in Saudi Arabia is currently rising quickly, and as people's spending power has improved, they have started to express interest in high-end sanitaryware products. Both new construction and the replacement market contribute to the demand for sanitaryware. Cities like Makkah and Jeddah would quickly develop into a center for global sanitaryware companies.
- International companies, including Roca, Grohe, Hansgrohe, Fiore, Elallar, Geberit, Nobili, Wisemaker, SSWW, Potter, and Sannora, intend to steadily expand the scope of their business operations in the Saudi Arabian market. Either their joint venture partners' Brownfield development or the creation of new enterprises will lead to the extension of their international brand.
- These businesses will supply the Saudi Arabian market with the branded and high-end sanitaryware items that consumers are demanding more of. International brands have several potentials due to Saudi Arabia's booming construction sector and growing premium consumer market.

Source: Mordor Intelligence



6 COMPETITIVE LANDSCAPE

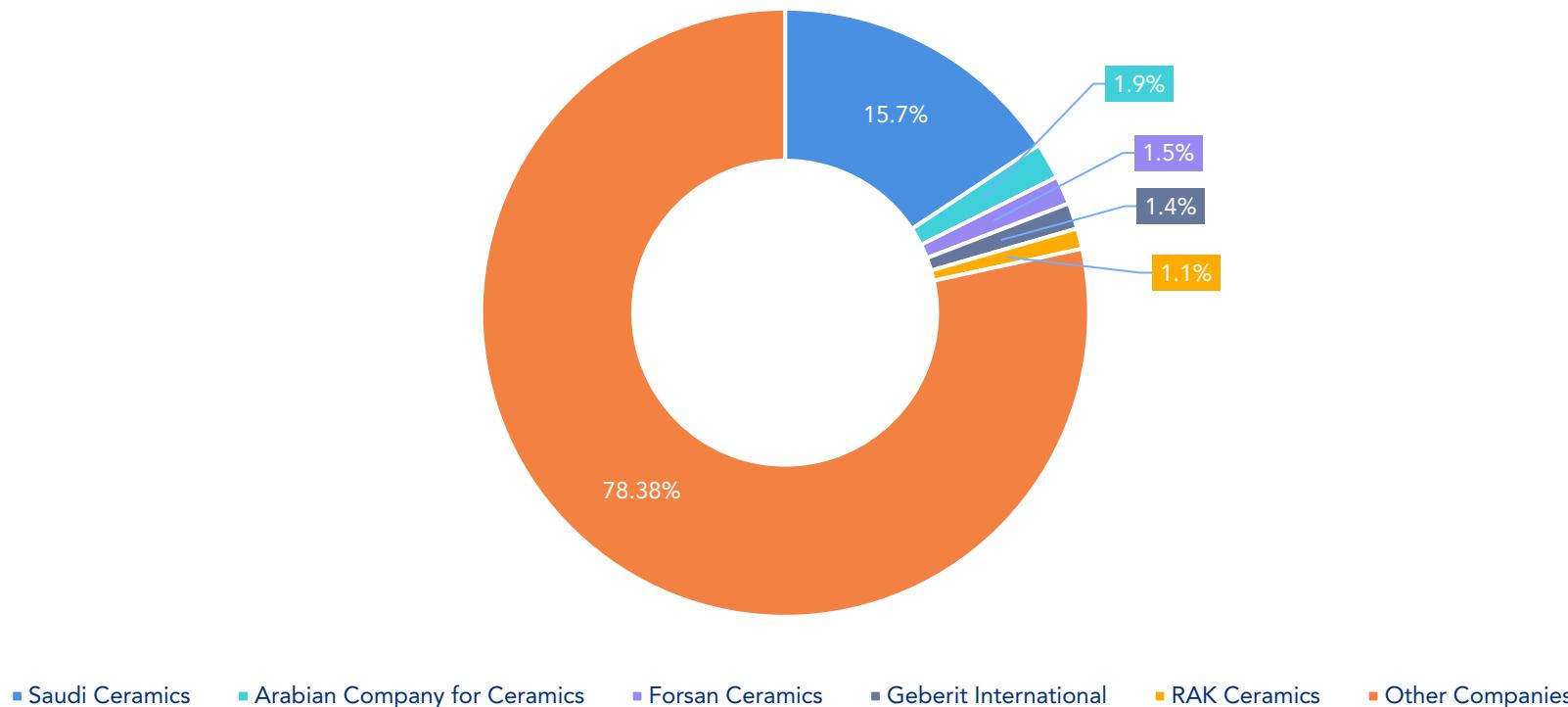
- 6.1 Market Share Analysis
- 6.2 Company Profiles





6.1 MARKET SHARE ANALYSIS (FOR MAJOR PLAYERS)

SANITARYWARE MARKET SHARE ANALYSIS, SAUDI ARABIA, (2022)



Source: Mordor Intelligence





6.2 COMPANY PROFILES

- 6.2.1 Saudi Ceramics
- 6.2.2 Forsan Ceramics
- 6.2.3 SIDC Ceramics Plant (Casavia)
- 6.2.4 RAK Ceramics
- 6.2.5 Geberit International Sales AG
- 6.2.6 Arabian Ceramics
- 6.2.7 Roca Sanitario SA
- 6.2.8 Hocheng Corporation
- 6.2.9 Kohler
- 6.2.10 Ceramica Cleopatra Group
- 6.2.11 Porsalina
- 6.2.12 Grohe
- 6.2.13 Al Ghamdi





6.2.1 SAUDI CERAMICS - OVERVIEW

الخزف السعودي
Saudi Ceramics



www.saudiceramics.com

DUNS no: 55-906-4157

OVERVIEW

- Saudi Ceramics is involved in manufacturing, storing, transferring, and marketing ceramic, marble, and porcelain tiles of various types and accessories, ceramic sanitary accessories, toilet fixtures, electric and solar water heaters and accessories, boilers, special paints for ceramic products, red pottery bricks and derivatives, Plastic, and ceramic pipes for various purposes.
- Saudi Ceramic Company Includes Mining(Extracting, processing, forming, and marketing raw materials) and trading (wholesale and retail trade).
- Saudi Ceramics operates around 50 showrooms all over Saudi, and it exports its products to more than 80 countries worldwide.



CORE BUSINESS OFFERINGS

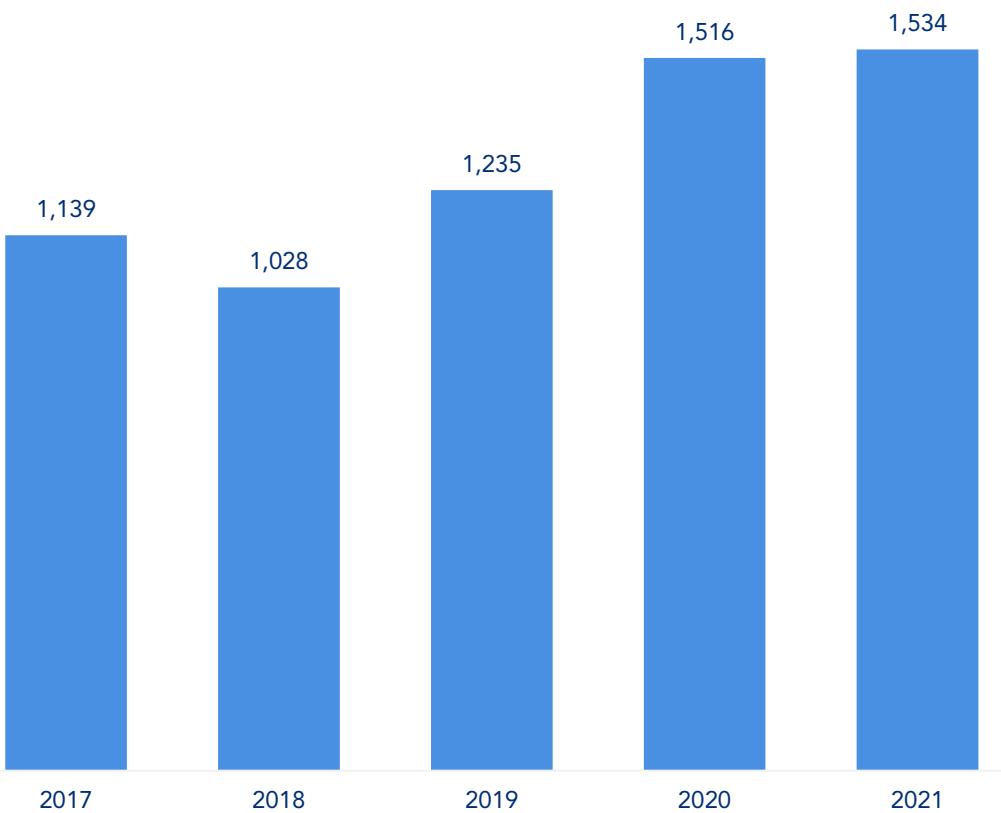
- Manufacturing
 - Ceramic Tiles
 - Porcelain Tiles
 - Sanitary Ware
 - Electric Water Heater
 - Red Bricks
 - Plastic & Acrylic
 - Bathroom Accessories
 - Ceramic Road Markers
 - Decorative Tiles
 - Design Services
 - Industrial Minerals
 - Resale Items
 - Tile Accessories
- Mining (Extracting, Processing, Forming, and Marketing Raw Materials)
- Trading (Wholesale and Retail Trade)

Source: Company Website, Annual Reports and Related Public Disclosures, D&B Hoovers

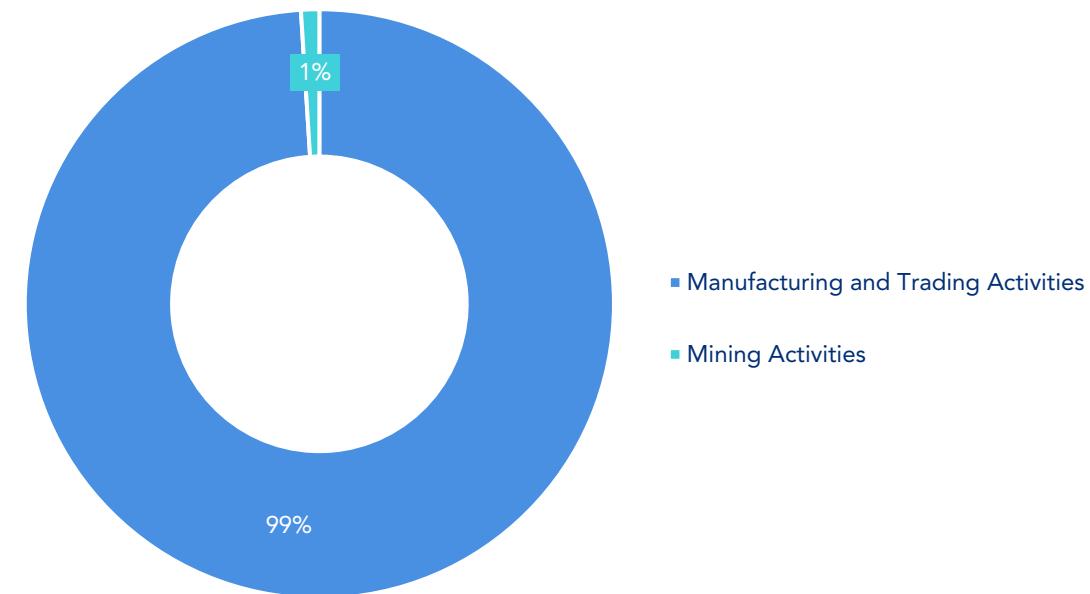


6.2.1 SAUDI CERAMICS - FINANCIALS

SAUDI CERAMICS, REVENUE IN SAR MILLION, 2017 - 2021



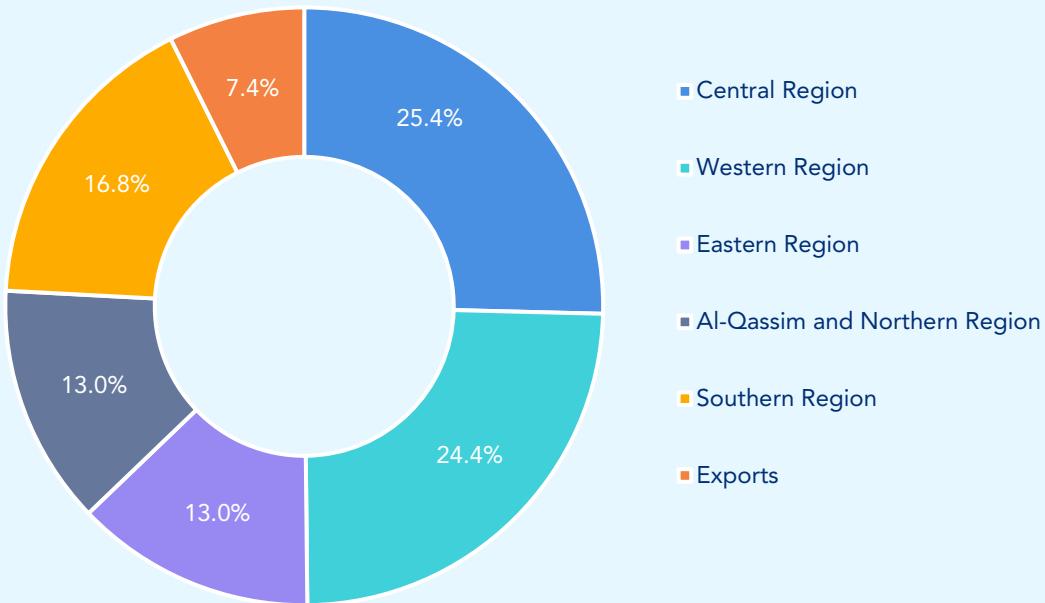
SAUDI CERAMICS, REVENUE BREAKDOWN BY PRODUCTS, 2021



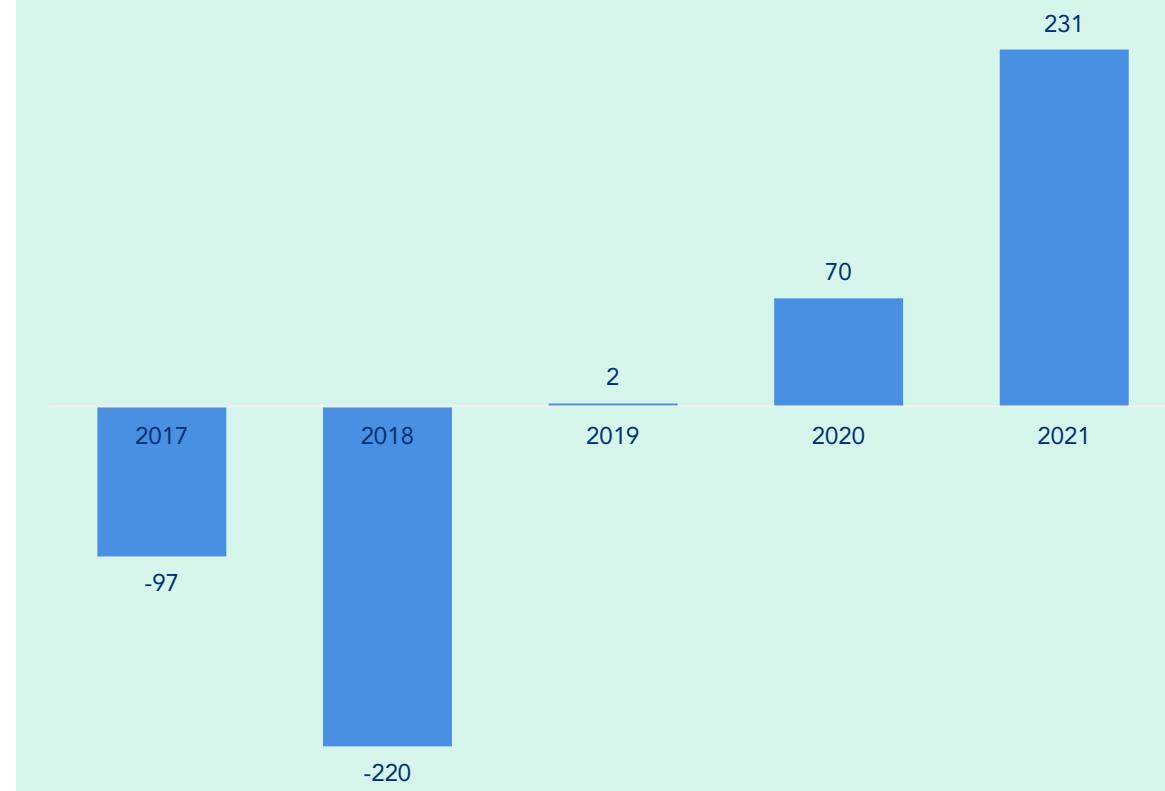
Source: Company Website, Annual Report

6.2.1 SAUDI CERAMICS - FINANCIALS

REVENUE BREAKDOWN BY GEOGRAPHICAL PERCENTAGE, 2021

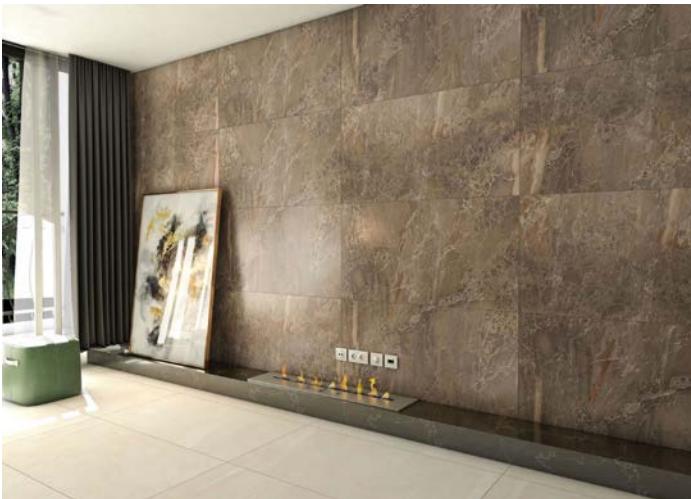


NET PROFIT, SAR MILLION, 2017 - 2021



Source: Annual reports

6.2.1 SAUDI CERAMICS - PRODUCTS



Ceramic Tiles

- Wood Surface Collection
- Marble Surface Collection
- Heritage Collection
- Islamic Collection
- Cement And Stone Surface Collection
- Plain And Patterned Surface Collection
- Swimming Pool Collection

Porcelain Tiles

- Marble And Stone Surface Collection
- Cement Surface Collection
- Plain And Patterned Surface Collection
- Wood Surface Collection

Sanitary Ware

- Sets (Coral, Sapphire, Topaz, Paris, Sawsan, Dana, Zomorud, Special Needs, flora)
- Water Closets (Coral (Black), Cady & Children, Jasmin, Wafi & Babel 200, Alwadi)
- Washbasins (Almasa WB Ablution, Mirage, Bodour, Vanity, Noor & Corner, Yaqout 100 & 200)

Source: Company Website, Annual Report



6.2.1 SAUDI CERAMICS - PRODUCTS



Electric Water Heaters

- Quad 10&15
- Above Sink and Under Sink
- Slim
- 30 Ltr Fat
- Vertical Standard
- Vertical Smart
- Vertical Super SCC
- Horizontal
- Vertical Floor Standing
- Central
- Solar
- Spare Parts

Plastic & Acrylic

- Bathtubs
- Shower Trays
- Seat and Covers
- Water Tanks
- Concealed Cistern
- Flexible Pipe
- Floor Drain
- Tile Spacer
- Overflow Grating Pins

Mixers/Resale

- Foot Washer
- Bathroom Furniture
- Jacuzzi
- Bathtub Screen
- Bathtubs
- Seat Covers
- Exposed Flush
- Sanitaryware Fittings
- Bathroom Accessories
- Bath Textiles
- Kitchen Mixers
- Set Shower & Accessories
- Water Heater Spare Parts

Source: Company Website, Annual Report



6.2.1 SAUDI CERAMICS – PRODUCTS



Bathroom PODS

The Smart Pods are fully manufactured in the company's offsite production plant and supplied to the construction site complete with water intake pipes, waste system, electrical installation, lighting, and ventilation system, cladded with first-class tiles and equipped with the best sanitary ware, faucets, and accessories.



Desert Mines – Minerals

- Potassium Feldspar
- Soda Feldspar
- Silica Sand
- Kaolin
- Washed Kaolin
- Red Clay
- Clay
- Limestone
- Dolomite



Red Bricks

- Hollow Brick
- Load Bearing Brick
- Hourdi Brick



6.2.1 SAUDI CERAMICS - EXPORTS

AMERICA	ASIA	MIDDLE EAST	EUROPE	GCC
Cuba	Afghanistan	Jordan	Bulgaria	Bahrain
Guadeloupe	Azerbaijan	Syria	Spain	Kuwait
Guyana	Bangladesh	Lebanon	France	Oman
Haiti	Kyrgyzstan	Iraq	United Kingdom	Qatar
Martinique	South Korea	Yemen	Italy	UAE
		Egypt	Lithuania	
		Sudan	Latvia	
		Ethiopia	Moldova	
			Malta	
			Portugal	
			Romania	
			Russian Fed.	
			Ukraine	

Source: Company Website, Annual Report





6.2.2 FORSAN CERAMICS - OVERVIEW



www.forsan-ceramics.com

DUNS no: 55-765-1649

OVERVIEW

- Forsan Ceramics is an industrial manufacturing company that specializes in manufacturing ceramics and porcelain products.
- The company's ceramics and porcelain products include a contemporary range of ceramic tiles, porcelain tiles, and sanitary ware collections, enabling customers to get tier-one products at competitive prices.
- It is led by a team of highly experienced professionals who have been working together for manufacturing ceramics and distribution for the past 20 years. In addition to the production facilities, Forsan Ceramics includes a center of training excellence for Saudi employees, enabling them to stay in line with the latest production trends and technologies.

Jeddah, Saudi Arabia

Headquarters

2012

Founded

~1,000 (2021)

Employees

+966 12 611 3014

Contact Number

CORE BUSINESS OFFERINGS

- Ceramic Tiles
- Porcelain Tiles
- Sanitary Ware



6.2.2 FORSAN CERAMICS - PRODUCTS



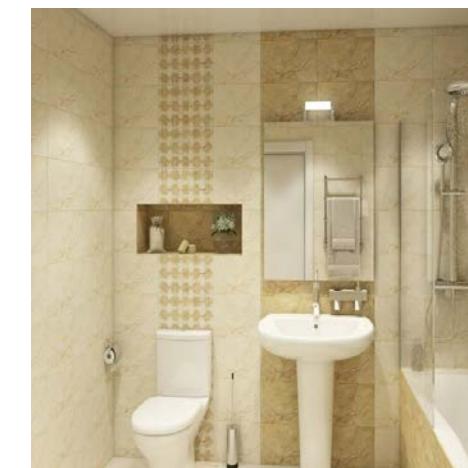
Ceramic Tiles

- Ceramic
- Marble
- Mosaic
- Plain
- Stone
- Geometric
- Rustic
- Textile
- Wood
- Brick
- Cotto



Porcelain Tiles

- Cemento
- Double Charge
- Marble
- Rustic
- Stone
- Sand
- Wood



Sanitary Ware

- Kinzy
- System One
- System Two
- Club
- Day By Day
- Eco
- Minimax

Source: Company Website, Annual Report



6.2.3 SIDC CERAMICS PLANT (CASAVIA) – OVERVIEW



casavia.com.sa

DUNS Number: 55-766-0003

OVERVIEW

- Casavia is a sanitary wares company. Casavia is a subsidiary of the Saudi Industrial Development Company (SIDC).
- The company has branch offices in Riyadh, Jeddah, Dammam, Makkah, Madinah, Khamis Muhsayt, and Yanbu. Yanbu is also the site of their 87,000-square-meter manufacturing facility.
- The company manufactures ceramic and acrylic sanitary fixtures, including WCs, sinks, washbasins, bidets, shower trays, and bathtubs. They also produce products for custom export customers in several Arab countries, as well as countries in Africa, Asia, and Europe.

USD 8.82 million

Global Revenue (2020)

~500

Employees

+966-50504394103

Contact

Jeddah, Saudi Arabia

Headquarters

CORE BUSINESS SEGMENTS

- Ceramic Sanitary Fixtures
- Acrylic Sanitary Fixtures
- Other Sanitaryware Products





6.2.3 SIDC CERAMICS PLANT (CASAVIA) – PRODUCTS

CERAMIC PRODUCTS

- Jade
- Aqua Marine
- Al Masa
- Murjan
- Dana
- Fairoz
- Lapis
- Zircon
- Handicapped
- Granato
- Cromo
- Larimar
- Durrah
- Ruby
- Series
- Ruby
- Belloura
- Youser

ACRYLIC PRODUCTS

- Ward
- Dahlia
- Sawsan

Source: Company Website





6.2.3 SIDC CERAMICS PLANT (CASAVIA) – PROJECTS

S.NO	PROJECT	OWNER
01	Custodian of the two holy mosques	Ministry of interior
02	Security headquarters development	Ministry of interior
03	Kap 2 & kap5	Ministry of interior
04	Security forces housing south KSA	Ministry of interior
05	Custodian of the two holy mosques	Ministry of justice
06	Justice utility development	Ministry of justice
07	National guard & officers housing	Ministry of national guard
08	Kingdom city housing	Kingdom holding company
09	Government hospitals	Ministry of health
10	Government Schools	Ministry Of Education
11	NEOM	Public Investment Fund
12	The Red Sea	The Red Sea Development Co.

Source: Company Website





6.2.3 SIDC CERAMICS PLANT (CASAVIA) - CORPORATE CUSTOMERS



مجموّعة بن لادن السعودية
SAUDI BINLADIN GROUP



شركة الغوزان للتجارة والمقاولات العامة
AL FOUZAN TRADING & GENERAL CONSTRUCTION CO.



ARABIAN CONSTRUCTION CO.



شركة بكين الإمارات
Beijing Emirates Company



شركة الراشد للتجارة والمقاولات
AL-RASHID TRADING & CONTRACTING CO.





6.2.3 SIDC CERAMICS PLANT (CASAVIA) - WHOLESALE RETAILERS



شركة الهدبانية للتجارة
Al-Hadbania Trading Co.



Source: Company Website





6.2.3 SIDC CERAMICS PLANT (CASAVIA) – PREVIOUS WORKS AND ASSIGNMENTS



وزارة الدفاع
MINISTRY OF DEFENSE



وزارة التعليم
Ministry of Education



شركة تطوير للمباني
TATWEER BUILDINGS COMPANY

Source: Company Website





6.2.4 RAK CERAMICS - OVERVIEW



www.rakceramics.com

DUNS Number: 85-109-2809

OVERVIEW

- RAK Ceramics is one of the largest brands of ceramics in the world. The company specializes in ceramic and porcelain walls, floor tiles, and sanitaryware products.
- Headquartered in the United Arab Emirates, the company serves clients in more than 150 countries through a network of operational hubs in Europe, the Middle East and North Africa, Asia, North and South America, and Australia.
- RAK Ceramics can produce 118 million square meters of tiles, 5 million pieces of sanitaryware, 24 million pieces of porcelain tableware, and 1 million pieces of faucets per year at 21 state-of-the-art plants across the United Arab Emirates, India, and Bangladesh.

Ras al Khaimah, United Arab Emirates

Headquarters

1989

Founded

~12,000 (2022)

Employees

AED 3.52 billion (2022)

Total Revenue

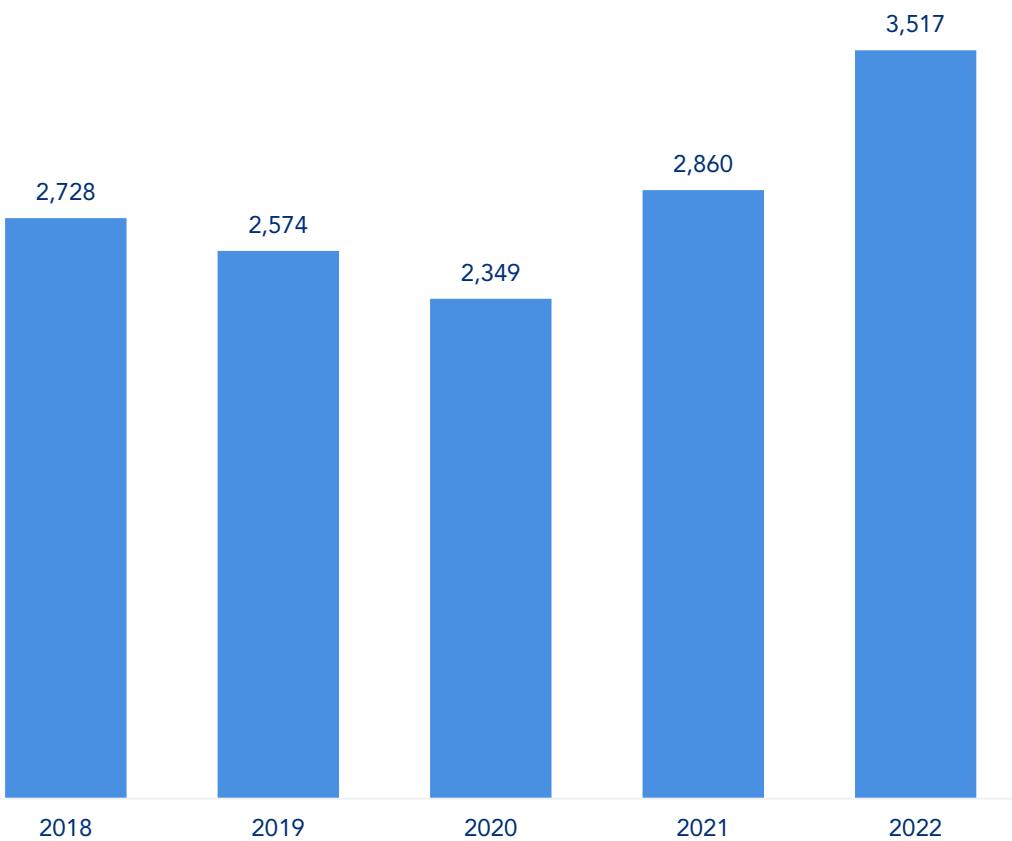
CORE BUSINESS OFFERINGS

- Ceramic Products
 - Tiles
 - Bathroom Sets
 - Sanitary Wares
 - Table Wares
- Faucets
- Other industrial
 - Manufacturing and Distribution of Power Paints
 - Plastics
 - Mines and Chemicals
- Others
 - Security Services
 - Material Movement
 - Real Estate
 - Construction of Projects and Civil Works

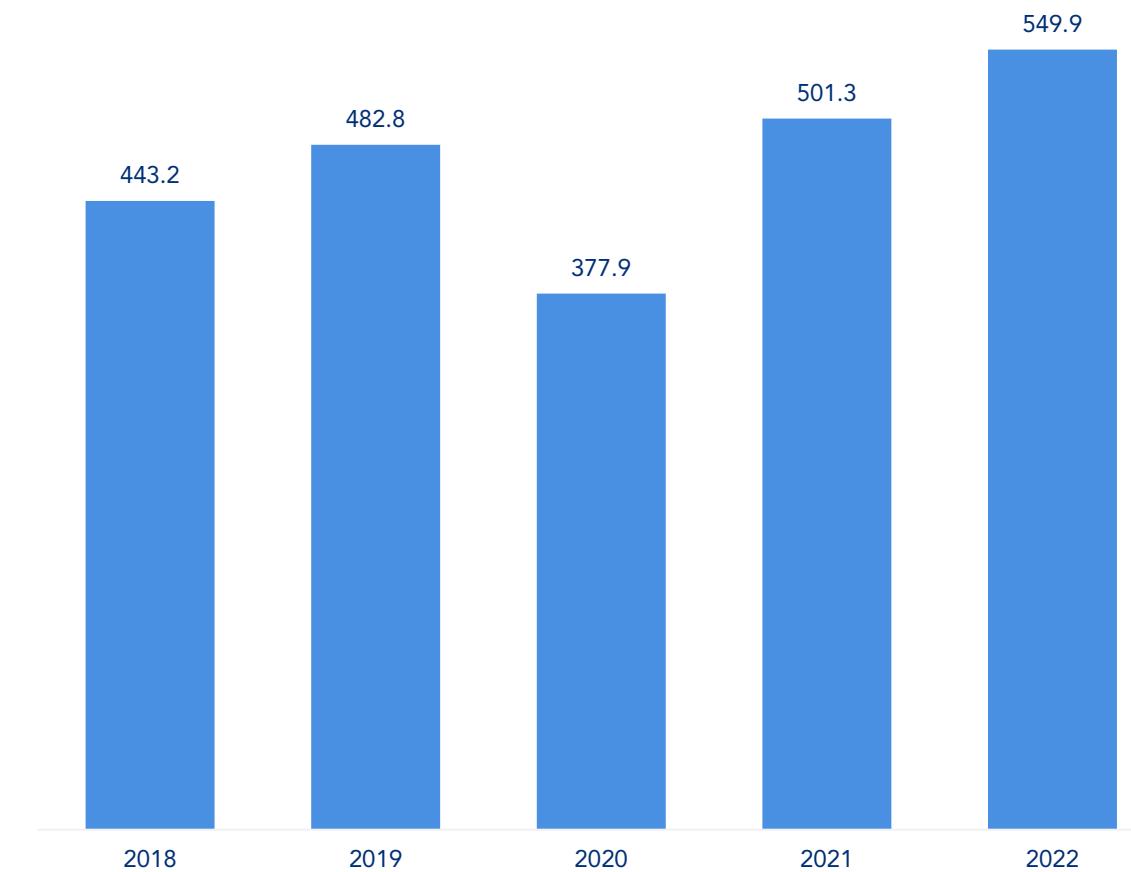


6.2.4 RAK CERAMICS - FINANCIALS

RAK CERAMICS, REVENUE IN AED MILLION, 2018 – 2022



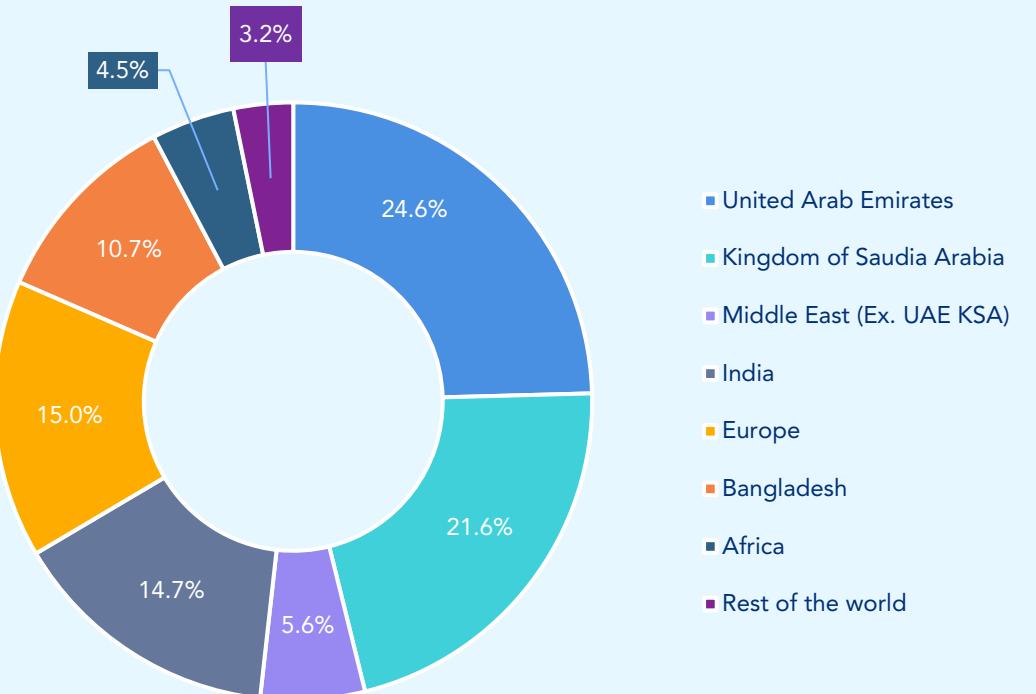
RAK CERAMICS, EBITDA IN AED MILLION, 2018 - 2022



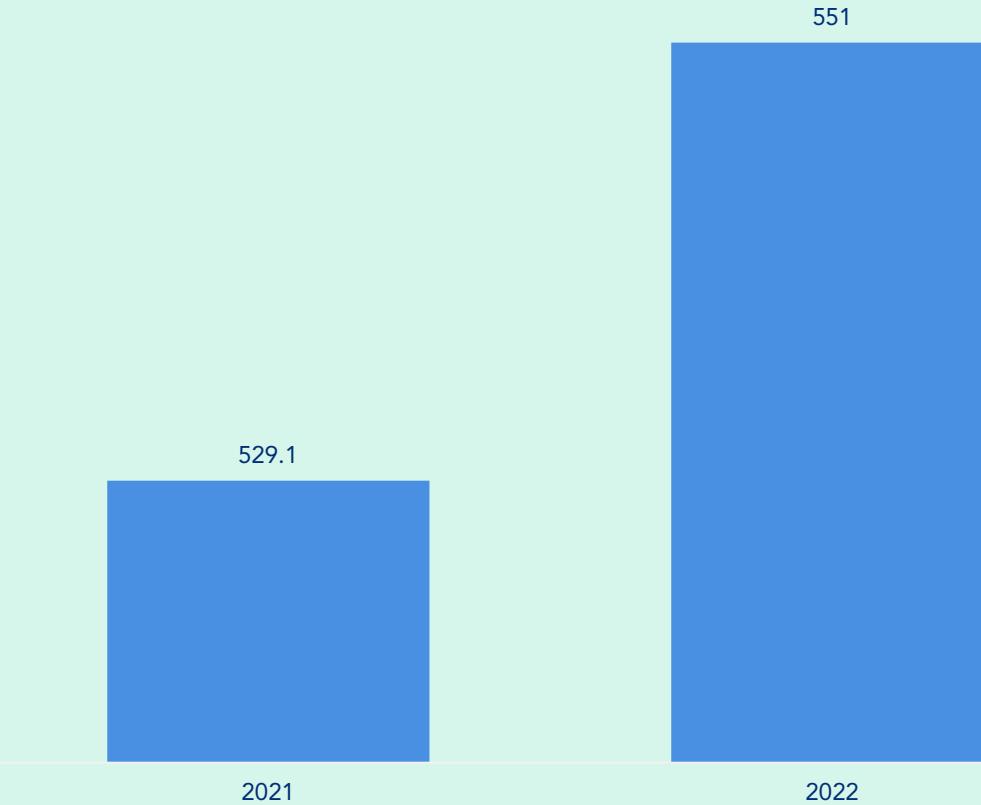
Source: Company Website, Annual Report

6.2.4 RAK CERAMICS - FINANCIALS

REVENUE BREAKDOWN BY GEOGRAPHICAL PERCENTAGE, 2022



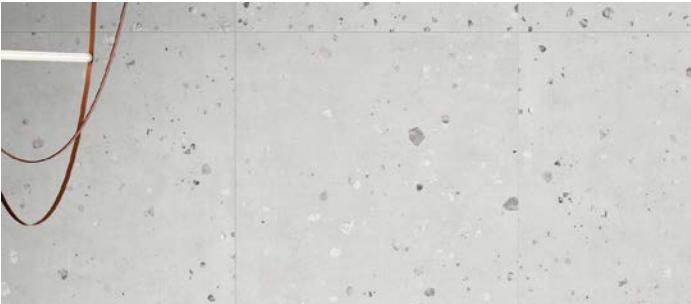
SANITARYWARE REVENUE AED MILLION, 2021 – 2022



Source: Company Website, Annual Report



6.2.4 RAK CERAMICS – PRODUCTS



Concrete Tiles



Marble Tiles



Pattern Tiles



Plain Tiles



Stone Tiles



Wood Tiles

Source: Company Website



6.2.4 RAK CERAMICS – PRODUCTS



Water Closets



Bidets



Wash Basins



Urinals and Partitions



Accessories



Furniture

Source: Company Website

6.2.4 RAK CERAMICS – PRODUCTS



Mirrors and Lights



Bathtubs



Shower Trays



Flushing System



Kitchen Sinks

Source: Company Website

6.2.4 RAK CERAMICS - PROJECTS



DUBAI AIRPORT, 2016
Commercial, Wall and Floor Application

- This large-scale project required world-class design, equipment, and accessories to match the already luxurious standards of the Dubai International Airport.
- It supplied a range of tiles, and the tiles chosen were selected for their durability, superior breakage, strength, and esthetics.



AL JAWARAH TOWER, 2016
Residential Building, Wall and Floor Application

- The challenge for this project was the complexity of the design of the tower. Floor layouts constantly changed on higher floors due to the twisting shape.
- RAK Ceramics' Lounge Series was installed to fulfill the requirements. The series was provided in a wide range of sizes, with polished and unpolished finishes matching perfectly with the twisting shape. The glossy appearance of RAK Ceramics' Crystal Series was used on the walls to create a luxurious look and feel throughout the modern urban-styled interiors.



PRINCESS NOURA UNIVERSITY
Commercial, Wall, and Floor Application

- The challenge for this project was providing not only the quality of tiles that matched their expectations but also RAK Ceramics' ability to meet the required deadline on time and within budget.
- It supplied a range of tiles, and the tiles chosen were selected for their durability, superior breakage, strength, and esthetics.



6.2.5 GEBERIT INTERNATIONAL SALES AG



www.geberit-global.com

DUNS Number: 48-281-9930

OVERVIEW

- The globally operating Geberit Group is a leader in the field of sanitary products.
- Geberit specializes in providing innovative solutions for the bathroom and sanitary sector. Their product portfolio includes concealed cisterns, flush plates, toilets, bidets, urinals, bathroom furniture, shower drains, piping systems, and installation systems. These products are designed to enhance the functionality, comfort, and aesthetics of bathrooms.
- Geberit operates with a strong local presence in most countries. The production network encompasses 29 production facilities, of which 6 are overseas.

CHF 3.4 billion

Revenue (2022)

~12,000

Employees

1874

Founded

Sankt Gallen, Switzerland

Headquarters

CORE BUSINESS SEGMENTS

- Sanitary Industry
- Piping Industry
- Shower toilets (Geberit AquaClean)
- Sanitary Ceramics
- Bathroom Products



6.2.5 GEBERIT INTERNATIONAL SALES AG – PRODUCTS - BATHROOM SERIES

GEBERIT ONE**GEBERIT XENO²****GEBERIT CITTERIO****GEBERIT ACANTO****GEBERIT ICON****GEBERIT VARIFORM**

Source: Company Website

6.2.5 GEBERIT INTERNATIONAL SALES AG – PRODUCTS - BATHROOM SERIES

GEBERIT SMYLE**GEBERIT SELNOVA****GEBERIT SELNOVA
COMFORT****GEBERIT SENYA****GEBERIT OPTION****GEBERIT BAMBINI**

Source: Company Website



6.2.5 GEBERIT INTERNATIONAL SALES AG – PRODUCTS

BATHROOM PRODUCTS

- Geberit AquaClean
- Geberit Monolith
- Geberit WC solutions
- Space-saving solutions
- Actuator plates and flush controls
- Concealed cisterns
- Exposed cisterns
- Fill and flush valves
- Urinal Systems
- Bathtubs and bathtub drains
- Geberit washbasin taps
- Traps for washbasins
- Washplace solutions
- Shower drainage

INSTALLATION SYSTEMS

- Geberit Duofix
- Geberit GIS
- Geberit Kombifix
- Water Supply and Electricity Connections

PIPING SYSTEMS FOR WATER SUPPLY

- Geberit Mapress Stainless Steel
- Geberit Mapress Copper
- Geberit Mapress Carbon Steel
- Geberit Mapress CuNiFe
- Geberit Mepla
- Tools and Accessories

PIPING SYSTEMS FOR BUILDING DRAINAGE

- Geberit Pluvia
- Geberit SuperTube
- Geberit HDPE
- Geberit Silent-db20
- Tools and Accessories

Source: Company Website



6.2.5 GEBERIT INTERNATIONAL SALES AG – STORE LOCATIONS



Source: Company Website



6.2.6 ARABIAN CERAMICS – OVERVIEW



www.arabian-ceramics.com

DUNS Number: 55-771-7191

OVERVIEW

- ACMC produces an exclusive range of porcelain and ceramic tiles.
- Arabian Ceramics produces high-quality ceramics and porcelain to compete with internationally recognized brands, which are imported mainly from Spain and Italy, which Middle Eastern and Gulf markets are keen to absorb.
- ACMC factory is certified by Saudi Standard (SASO) quality mark SSA 10 31 and European & international standard EN 144111 & ISO 130006 as well as management system as per EN ISO 9001: 2008.

USD 41.76 million

Revenue

~ 420

Employees

2006

Founded

Jeddah, Saudi Arabia

Headquarters

CORE BUSINESS SEGMENTS

- Ceramic Products



6.2.6 ARABIAN CERAMICS – LOCATIONS – DEALERS

LOCATIONS



Source: Company Website

DEALERS

- Traco
- AI NAJAH AI ZAHABYA Co.
- Al Thuraiya Int. Co.
- Mimas Int. Est
- Ebaa House
- AI AWAD FOR Ceramics
- EBDA AI MAWASEM Est.
- Rowad Al Talug Est.
- Bayader Jeddah For Ceramic
- ABDULLAH Alomairin Est.
- Al Omaraa Ceramics
- Tri-union
- Mabkhot Saleh Ahmed Bin Eshaq & Sons
- Ali Saqaf



6.2.6 ARABIAN CERAMICS – COLLECTIONS

- Alma
- Apollo
- Aqua
- Aragon
- Area
- Arcadia
- Artic
- Atrium
- Avenue
- Baikal
- Bistro
- Barsha
- Bologna
- Brada
- Bronze
- Calacatta
- Canica
- Capri
- Carrara
- Cement

- Circle
- Code
- Coliseo
- Cotto
- Cotton
- Daka
- Darco
- Dayana
- Devon
- Diverse
- Dogana
- Duomo
- Finnis
- Joly
- Lake cream
- Lolita
- Lounge
- Maria
- Tierra
- Venecia

Source: Company Website





6.2.7 ROCA SANITARIO SA - OVERVIEW



www.roca.com

DUNS Number - 46-002-4953

GLOBAL OVERVIEW

- Roca SANITARIO SA specializes in the design, production, and distribution of bathroom products and solutions.
- Roca began its activity in 1917, manufacturing cast iron radiators for domestic heating in its factory in Barcelona. In addition to the first cast iron radiators, it complemented its catalog with the production of boilers and entered the bathroom sector with the manufacturing of baths.
- Today, Roca's commercial network reaches more than 170 countries, supplied by its 76 production plants and more than 24,492 employees worldwide.
- Similor AG, Keramik Holding Ag Llaufen, Akvaton, OOO Keramika, Laufen Ceramics Inc, and Industrias Cosmic SAU are some of the subsidiaries of Roca Group.

EUR 2,053 million (FY 2021)

Global Revenue

~21,000

Employees

1917

Founded

Barcelona, Spain

Headquarters

CORE BUSINESS SEGMENTS

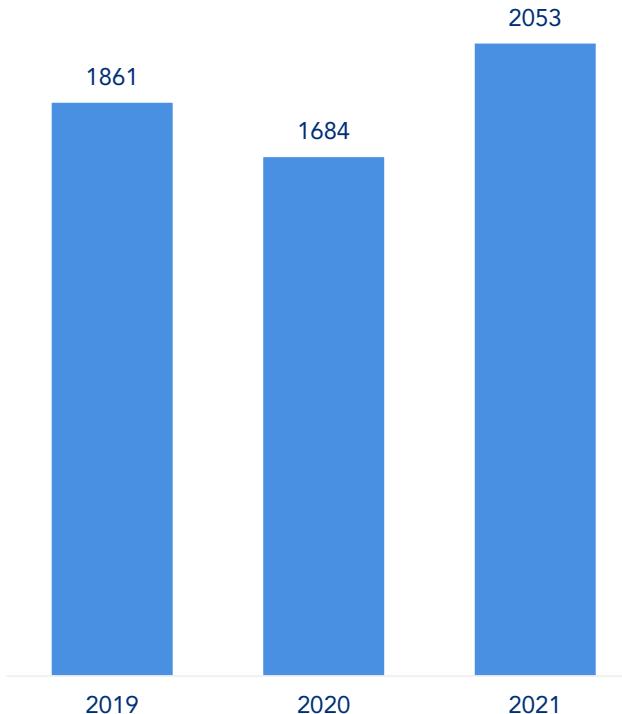
- Bathroom Collection
 - Furniture
 - Faucets
 - Accessories



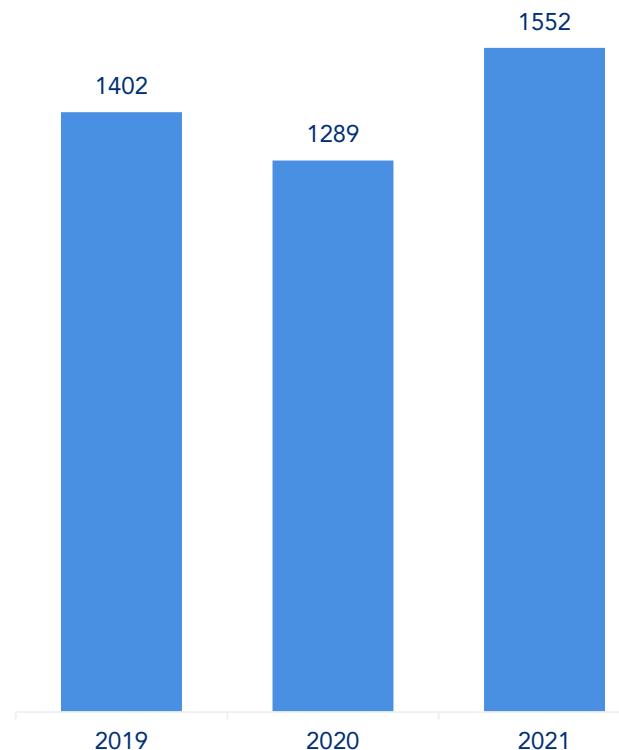


6.2.7 ROCA SANITARIO SA - FINANCIALS

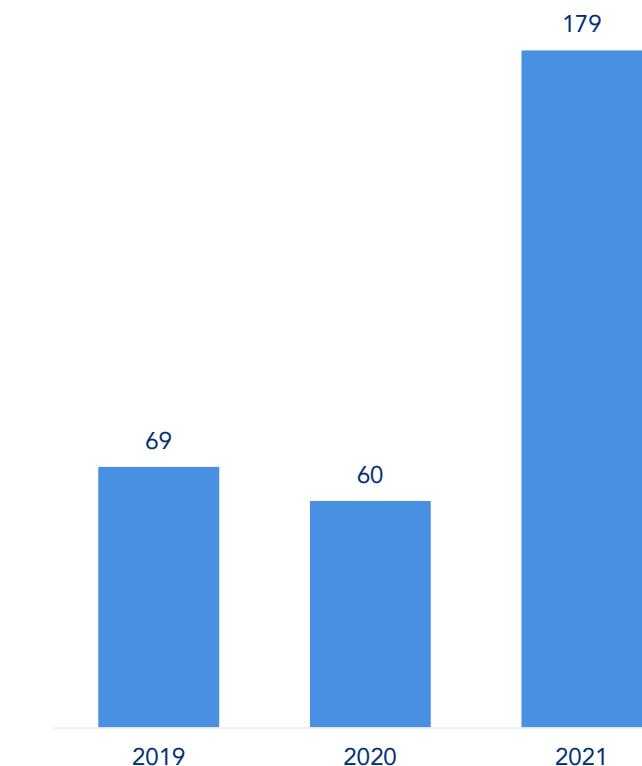
ROCA SANITARIO SA, REVENUE IN EUR MILLION, 2019-2021



ROCA SANITARIO SA, TOTAL NET EQUITY IN EUR MILLION, 2019-2021



ROCA SANITARIO SA, NET PROFIT IN EUR MILLION, 2019-2021



Source: Company Website, Annual Report





6.2.7 ROCA SANITARIO SA - PRODUCTS



The company offers following products in Saudi Arabia –

- Basin
- Faucets
- Seats and Covers
- Furniture
- Shower
- Toilet Mechanisms
- Mirrors
- Shower Trays
- Installation Systems
- Smart Toilets
- Baths
- Urinals
- Toilets
- Shower Screens
- Other Ceramic Products
- Bidets
- Accessories
- Kitchen Sinks

Source: Company Website





6.2.7 ROCA SANITARIO SA - SUBSIDIARIES

LAUFEN

JohnsonSuisse
Bathroom Solutions



SK
SIMILOR
KUGLER



ECONAX

CESAROM®

Source: Company Website



6.2.8 HOCHENG CORPORATION – OVERVIEW



www.hcg.com.tw

DUNS Number – 65-601-9775

GLOBAL OVERVIEW

- HCG Corporation is one of the leading players in manufacturing sanitary ware, kitchen utensils, and water supply copperware.
- The company also offers its products in a wide range of fields such as construction, precision ceramics, stoves, and residential equipment.
- Initially, the company focused on producing porcelain products, including tableware and decorative items. Over time, it shifted its focus to the bathroom industry, becoming one of the pioneers in the manufacturing of sanitary ware in Taiwan.
- The company has manufacturing facilities in Taiwan, China, and Vietnam, enabling it to serve both domestic and international markets.

USD 167.97 million

Global Revenue

1,066

Employees

1961

Founded

Taipei City

Headquarters

CORE BUSINESS SEGMENTS

- Bathroom
- Kitchenware
- Accessories





6.2.8 HOCHENG CORPORATION – PRODUCTS



Source: Company Website



The company offers following Bathroom Sanitaryware products in Saudi Arabia –

- Toilet
- Faucet
- Washbasin
- Bathroom Cabinet
- Integrated Bathtub
- Vanity Mirror
- Mesa
- Urinal
- Automatic Appliance
- Toilet Seat Covers and Grab Bars
- Bioenergy Ceramic Material Series Products
- Electric Lifting Drying Machine
- Shower Door
- Shower Column
- Jacuzzi
- Bathroom Multifunction

6.2.8 HOCHENG CORPORATION – QUALITY CERTIFICATION



台灣精品獎



台灣精品銀質獎



台灣百大品牌



MIT 微笑標章



金點設計標章



iF 設計大獎



省水標章



環保標章



節能標章



CNS正字標記



綠建材標章

Source: Company Website



6.2.9 KOHLER MIDDLE EAST - OVERVIEW



me.kohler.com

DUNS Number - 00-607-3225

GLOBAL OVERVIEW

- Kohler Middle East is the regional subsidiary of Kohler Co., a leading global manufacturer of kitchen and bathroom fixtures, plumbing products, furniture, and other related products.
- The company has a strong presence in the Middle East; Kohler Middle East caters to residential, commercial, and hospitality sectors, offering innovative and high-quality solutions for the bathroom and kitchen.
- Kohler has more than 50 manufacturing facilities worldwide. The organization creates solutions to address urgent problems, such as clean water and sanitation, for underprivileged communities worldwide to improve the quality of life for present and future generations.

USD 1.43 billion

Global Revenue of Kohler (Parent Company)

~40,000

Employees

1873

Founded

Wisconsin, United States

Headquarters

BUSINESS SEGMENTS

- Bathroom
- Kitchen





6.2.9 KOHLER – PRODUCTS



The company offers the following Bathroom Sanitaryware products in Saudi Arabia –

- Bathroom faucets (Lavatory Faucet, Bath Faucets, Exposed Bath Shower Faucet, Bathroom Fittings)
- Showering (Shower Columns and Panels, Rainheads, Handshowers, Valves and Trims, DTV, Shower Kits, Bodysprays, and Shower Fittings)
- Toilet
- Toilet Seats (Manual Bidet Seats and Bidet Seats)
- Bathtub
- Commercial Bathroom (Sensor Faucets, Urinals, Toilet and Urinal Sensors, In-Walk Tanks, In-Wall Faceplates)
- Shower Doors
- Steam generator
- Bathroom Furniture
- Mirrored Cabinets
- Mirrors
- Bathroom Accessories

Source: Company Website





6.2.9 KOHLER – KEY DEVELOPMENTS

DATE	TYPE OF KEY DEVELOPMENTS	DETAILS
August 2022	Product Innovation	The intelligent toilets from Kohler's Numi 2.0, Eir, Innate, and Veil series offer cutting-edge technology features, such as heated seats and built-in nightlights. The company's Numi 2.0 toilet, a part of Kohler's smart home line with many networking features, has an ultramodern, angular form.

Source: Company Website





6.2.10 CERAMICA CLEOPATRA GROUP – OVERVIEW



www.cleopatraceramics.com

DUNS Number – 64-500-4326

GLOBAL OVERVIEW

- The Ceramica Cleopatra Group is an Egyptian multinational company specializing in the manufacturing and distributing ceramic tiles and sanitary ware products.
- The company was Founded in 1983, the company has grown to become one of the largest ceramic manufacturers in Egypt and the Middle East region.
- Ceramica Cleopatra Group owns 17 industrial plants in the North-West Gulf of Suez. The company's production is exported worldwide, reaching 108 countries.

~USD 27.88 million

Global Revenue

~25,000

Employees

1983

Founded

Ramadan City, Egypt

Headquarters

CORE BUSINESS SEGMENTS

- Sanitaryware
- Porcelain Tiles
- XXL Porcelain tiles
- Ceramic Tiles





6.2.10 CERAMICA CLEOPATRA GROUP – SANITARYWARE PRODUCTS

WASHBASIN



BIDET



WATER CLOSET



URIN BOWLS



SHOWER TRAY



BATHROOM ACCESSORIES



Source: Company Website

6.2.10 CERAMICA CLEOPATRA GROUP – PROJECTS IN EGYPT

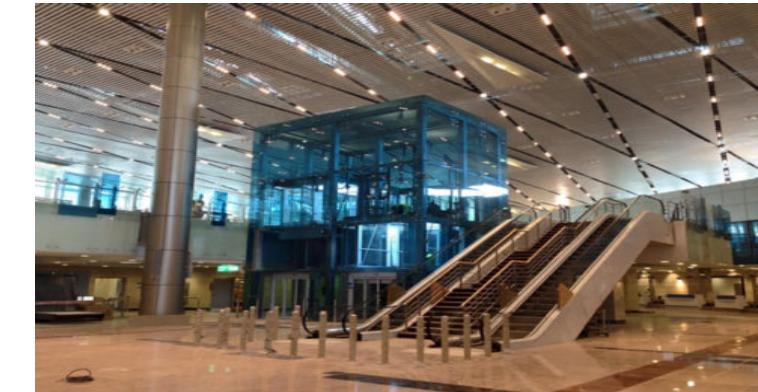
HYATT REGENCY HOTEL SHARM EL SHEIKH



AL- ASMARAT COMPOUND MOKATTAM



CAIRO INTERNATIONAL AIRPORT



SUN CITY MALL



SAUDI EMBASSY IN CAIRO



FUTURE UNIVERSITY IN EGYPT



Source: Company Website



6.2.10 CERAMICA CLEOPATRA GROUP – INTERNATIONAL PROJECTS

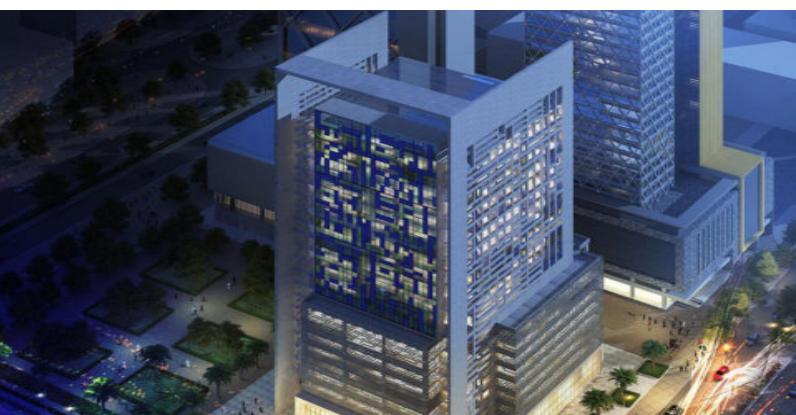
RUAKA HOUSING PROJECT IN NAIROBI CITY



REGA ROYAL HOTEL



MARINA TOWER



LSOKAWA OSHIKUMA SHOP



Source: Company Website





6.2.11 PORSALINA – OVERVIEW



porsalina.com.sa

DUNS Number – 55-784-7483

GLOBAL OVERVIEW

- Porsalina is a bath product manufacturing and exporting company based in Saudi Arabia. The company was established in 1990.
- Its products include squat pans, bathroom sets, and wash basins. Porsalina factory with an area of 133,333 square meters.
- Porsalina's sanitary ware is a superfine product originating from Europe living standards. Porsalina's products sell well around the Middle East and are exported to many nations, such as GCC countries & middle east.
- The company aims to increase its market share for sanitaryware to 35% by the end of this calendar year.

USD 15.27 million

Global Revenue

~200

Employees

1990

Founded

Riyadh, Saudi Arabia

Headquarters

CORE BUSINESS SEGMENT

- Bathroom Ceramics





6.2.11 PORSALINA – PRODUCTS

SANITARYWARE PRODUCTS

The company offers Sanitaryware such as –

- Water Closet
- Toilet
- Washbasin
- Squatting pan
- Bidet

COLLECTION

These compact and elegant cloakroom bathroom suite collections contains a toilet with a neat 620mm projection and a slimline basin. Its one-piece coupled toilet ensures all pipework is well concealed, while the clever rimless design improves flushing hygiene and reduces bacteria. Pair the D-shaped pedestal basin with a striking matt black mixer tap for a statement finishing touch. The 3 or 4-piece bathroom suite has a handy fixing kit to make installation nice and simple. Following are the collections –

- Royal
- Robi
- Kanari
- Marina
- Romance
- Faal



6.2.12 GROHE – GLOBAL OVERVIEW



www.grohe.com

DUNS Number: 34-256-6721

OVERVIEW

- Grohe Holding GmbH is a prominent global brand known for its comprehensive portfolio of high-quality sanitary fittings and water-related products.
- Grohe is a German plumbing fixtures manufacturer with its registered office in Hemer and headquarters in Düsseldorf.
- Since 2014, GROHE has been part of the strong brand portfolio of the Japanese manufacturer of pioneering water and housing products LIXIL.

USD 12.44 billion

Revenue (2022)

7,000+

Employees

1936

Founded

Düsseldorf, Germany

Headquarters

CORE BUSINESS SEGMENTS

- Bathroom
- Kitchen





6.2.12 GROHE – SAUDI ARABIA OVERVIEW



www.grohe-mena.com

DUNS Number: 56-180-3233

OVERVIEW

- Grohe Saudi Arabia Ltd Co. is primarily engaged in the wholesale distribution of hydronic plumbing and heating equipment and supplies.

USD 5.83 million

Revenue (2022)

+966-122845625

Contact

1936

Founded

Jeddah, Saudi Arabia

Headquarters

CORE BUSINESS SEGMENTS

- Bathroom and Kitchen Products





6.2.12 GROHE – SAUDI ARABIA – PRODUCTS

BATHROOM

- Wash Basins
- Showers
- Bathtubs
- Bathroom Accessories
- GROHE Ceramics
- WC, Urinal & Bidet

KITCHEN

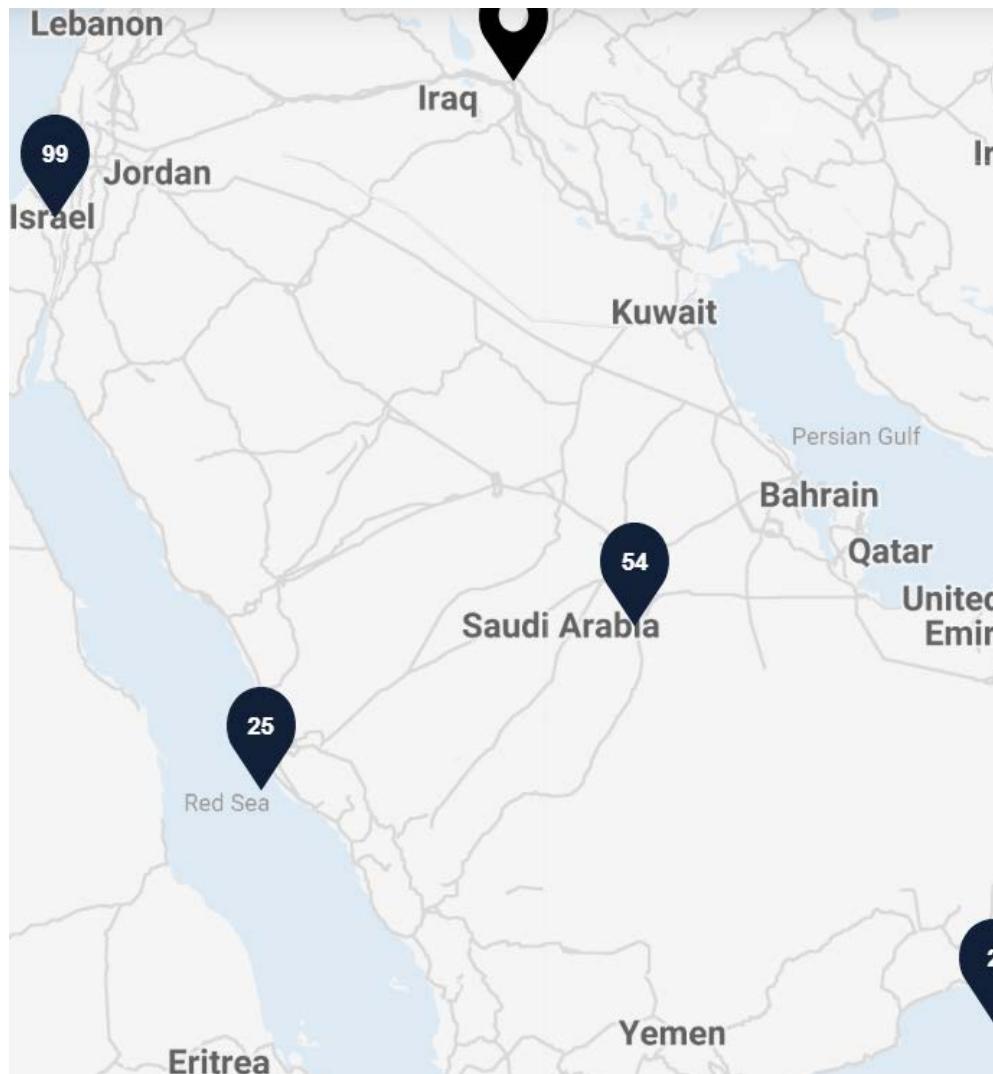
- Kitchen taps
- GROHE Watersystems
- Kitchen Sinks
- Kitchen Accessories
- GROHE Watersystems App

Source: Company Website





6.2.12 GROHE – SAUDI ARABIA – STORE LOCATIONS



Source: Company Website





6.2.13 AL GHAMDI - OVERVIEW



www.amghamdi.com

DUNS Number: 55-906-8646

OVERVIEW

- Al Ghamdi Sanitary Materials Stores primarily manufactures enameled iron, cast iron, or pressed metal sanitary ware. This company is the agent in the Kingdom for American Standard / Ideal Standard and Bobrick.
- The production ranges from stainless-steel accessories, vitreous China fixtures, and acrylic Bathtubs/ Whirlpool to a common bathroom.

USD 34.50 million

Revenue

~ 350

Employees

1970

Founded

Riyadh, Saudi Arabia

Headquarters

CORE BUSINESS SEGMENT

- Sanitaryware Products





6.2.13 AL GHAMDI – BRANDS



Ideal Standard



American
Standard



VIGLACERA HA LONG



Armitage
Shanks



BLANCO



GEBERIT SLOAN ELKAY

Source: Company Website





6.2.13 AL GHAMDI – PRODUCTS

Wash Basin

Shower Mixers

In-Wall Valves

Kitchen Mixers

Control Valves

Bidet Faucets

Wash Basin Mixers

Shower Trays

Toilets (Commercial)

Bathtubs

Countertop Lavatories

Pesdtal Lavatories

Wall-hung Lavatories

Urinals

Push Plates

Flushometer Valves

Wall-Mount Utility

Hand Spray

Cisterns

Shower Curtains Rods

Shower Curtains



6.2.13 AL GHAMDI – PRODUCTS

Baby Changing Station

Soap Dispenser

Hand Dryers

Clothes Lines

Tissue Dispenser Hooks

Medicine Cabinets

Toilet Brush Holders

Unit Grab Bars

Combination
Towel/Waste

Waste Receptacles

Sanitary Napkin

Toilets Tissue Dispenser

Paper Towel Dispenser

Mirrors

Towel Rods

Soap Dishes

Shelves

Hooks

Door Bumpers

Shower Seats

Ash Trays



6.2.13 AL GHAMDI – MAJOR PROJECTS (AIRPORTS AND HOTELS)

AIRPORTS

- Najran Airport (**Najran**)
- Tabuk Airport (**Tabuk**)
- Jeddah Airport (**Jeddah**)
- Madain Saleh Airport (**Madain Salih**)
- Air Base Project (**Jeddah**)

HOTELS

- KAEC - Waterfront Mall & Hotel (**Jeddah**)
- Sheraton Hotel (**Jeddah**)
- Nor Beach Resort (**Jeddah**)
- Al Asema Hotel {Renovation} (**Riyadh**)
- Al Fahad Hotel (**Riyadh**)
- Intercontinental Hotel {Renovation} (**Riyadh**)
- Intercontinental Hotel {Renovation} (**Riyadh**)
- Marriot Hotel (**Riyadh**)
- Taibah Palace Hotel (**Madinah**)
- Invest Insurance (**Madinah**)
- Al Jawad Al Abyad Hotel (**Makkah**)
- Elaph Hotel (**Makkah**)
- Aqeel Hotel (**Makkah**)
- Habitat Hotel (**Al Khobar**)
- Al Makarim Hotel (**Arar,Jouf & Quaryat**)

Source: Company Website





6.2.13 AL GHAMDI – MAJOR PROJECTS (TOWERS , VILLAS, AND COMPOUND)

TOWERS

- Al Mezan Tower (Riyadh)
- Al Olayan Tower (Riyadh)
- Al Rashed Tower (Riyadh)
- Al Anoud Tower (Riyadh)
- Al Mezan Tower (Riyadh)
- Al Muthawa Tower (Riyadh)
- Al Olayan Tower (Riyadh)
- Al Rashid Tower (Riyadh)
- Sky Towers (Riyadh)
- Spemaco Tower (Riyadh)
- Al Waseel Tower (Riyadh)
- Olaya Towers (Riyadh)

- Spemaco Tower (Riyadh)
- Burj Al Sultan Tower (Jeddah)
- Zahran Business Tower (Jeddah)
- Rocco Forte Hotel (Jeddah)
- Mahabes Aljen Tower (Makkah)
- Al Safi Towers (Hotels) (Madinah)
- Meridian Towers (Madinah)
- ZakiFaresi Tower (Jeddah)
- Royal Commission Doctor's Housing (Yanbu)

VILLAS & COMPOUND

- Al-Jazirah Compound (Jeddah)
- H.R.H. Beach House - Jeddah (Jeddah)
- Abdulrahman Al Rashed Est.Villas (Riyadh)
- Buqshan (280 Villas) Compound (Riyadh)
- Kingdom Housing Compound (Riyadh)
- Kingdom Housing Compound (Riyadh)
- Civil Defense Head Quarters (Riyadh)
- Buqshan(280 Villas) Compound (Riyadh)
- Marriot Apartments (Riyadh)
- National Guard Staff Housing (Riyadh)
- Prince Mansour Palace (Riyadh)
- YamamaHousing Compound Phase 3 (Riyadh)





6.2.13 AL GHAMDI – MAJOR PROJECTS (UNIVERSITIES AND COLLEGES)

- King Saud University (**Riyadh**)
- Princess Nora University {Girls College} (**Riyadh**)
- Kingdom Schools (**Riyadh**)
- King Faisal University (**Riyadh**)
- King Saud University (**Riyadh**)
- Manarat Schools (**Riyadh**)
- National Guard Military Schools (**Riyadh**)
- National Military Schools (**Riyadh**)
- King Saud Women College (**Riyadh**)
- King Saud University National Guard (**Riyadh**)
- Princess Noora Women University (**Riyadh**)
- Yamama College {Boys} (**Riyadh**)
- Kaust - Residential (Phase-1) (**Thuwal**)
- Kaust - Residential (Phase-2) (**Thuwal**)
- Kaust - Central Support Facilities (**Thuwal**)
- Kaust (Different Projects) (**Thuwal**)
- King Khaled University (**Abha**)
- Girls College University (**Yanbu**)
- Yanbu Technical College (**Yanbu**)
- KAAU (Class Rooms) (**Jeddah**)
- Al Thuraya College (**Jeddah**)
- Al-Andalus School (**Jeddah**)
- KAUST- King Abdullah University of Science And Technologies (**Jeddah**)
- Umm Al Qura University (**Makkah**)
- Umm Al Qura University (**Makkah**)
- College of Engineering {Qassim University} (**Quassim**)
- College Of Languages {Qassim University} (**Quassim**)
- Qassem University (**Qassem**)
- King Khalid University (**Abha**)
- King Saud Bin Abdulaziz University (**Riyadh & Madinah**)
- Najran University (**Najran**)
- Technical College (**Hail**)





6.2.13 AL GHAMDI – MAJOR PROJECTS (SHOPPING MALLS)

- Giant Shopping Mall (**Riyadh**)
- Granada Shopping Center (**Riyadh**)
- Carrefour Super Market Exit-5 (**Riyadh**)
- Giant Shopping Mall (**Riyadh**)
- Carrefour Super Market Exit-5 (**Riyadh**)
- Granada Shopping Centre (Gosi) (**Riyadh**)
- Haifa Mall (**Jeddah**)
- Al Rashid Mega Mall (**Madinah**)
- Al Nour Mall (**Madinah**)
- Carrefour Hyper Market (**Madinah**)
- Makkah Mall (**Makkah**)
- Al Turki Plaza (**Tabuk**)
- **Shopping Malls**
- Egyptian Embassy (**Riyadh**)
- Austrian Embassy (**Riyadh**)
- Civil Defence Head Quarters (**Riyadh**)
- Holiday Inn Minhal (Renovation) (**Riyadh**)
- IKEA Showroom Exit 16 (**Riyadh**)
- Austrian Embassy (**Riyadh**)
- Al Akaria Phase 3 (**Riyadh**)

- Royal Commission Doctor's Housing (**Yanbu**)
- Yanbu Administration Building (**Yanbu**)
- Yanbu Sea Port Administrative Bldg. (**Yanbu**)
- Dormitories (Royal Commission Bldg.) (**Yanbu**)
- Salam Plaza-Madinah (**Madinah**)
- Madinah Car Park Project (**Madinah**)
- Jarir Book Store (Throughout The Kingdom)
- Bilad Bank Branches (**K.S.A**)
- Moi -Civil Defence (**Najran**)
- Ministry of Water Bldg. (**Tabuk**)

- Lebanon Embassy (**Riyadh**)
- National Guard Battalion Site No# 4 5 & 6 (**Riyadh**)
- National Guard Battalion Site No#7 (**Riyadh**)
- NCB Head Quarters (**Riyadh**)
- Prince Sultan City (**Riyadh**)
- R.S.A.F Head Quarters (**Riyadh**)
- Saudi Telecommunication Building (**Riyadh**)
- Al Akariya Phase 3 (**Riyadh**)
- IKEA Showroom Exit 16 (**Riyadh**)
- King Fahd Library (**Riyadh**)
- CITC (Communication & Information Technology Commission) (**Riyadh**)
- Gulf Real Estate Office (**Riyadh**)
- Senegal Embassy (**Riyadh**)
- Gulf Real Estate Office (**Jeddah**)
- Bahra Cable Factory (**Jeddah**)
- Saudi Glass Factory (**Jeddah**)
- Jeddah Gate Development (E4) (**Jeddah**)
- Sedco New Offices (VIP) (**Jeddah**)
- R.C. Public Housing - Phase 2 (Pic G-1625) (**Yanbu**)





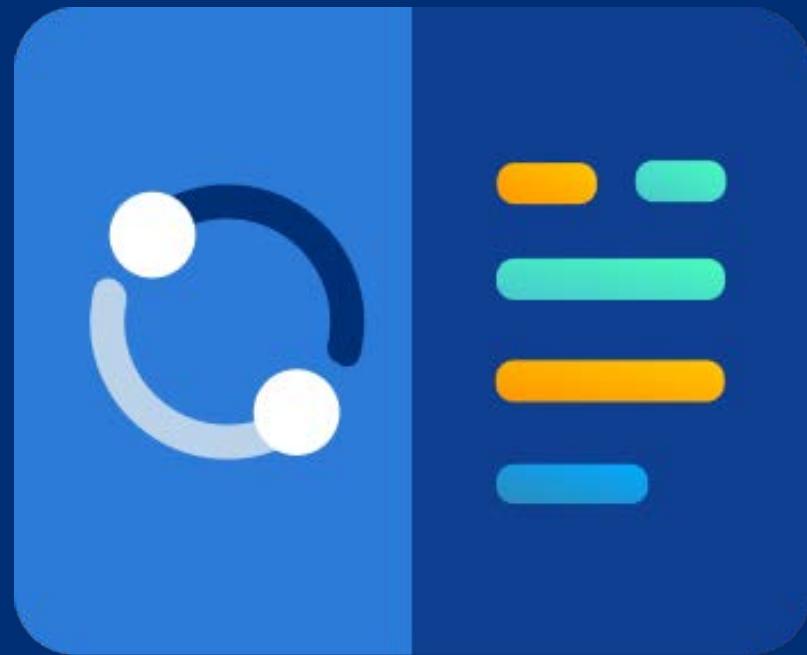
6.2.13 AL GHAMDI – MAJOR PROJECTS (HOSPITALS)

- Cardiac And Lever Plant Center National Gurad King Fahd Hospital (**Riyadh**)
- Dr. Abdulrahman Al Meshary Hospital (**Riyadh**)
- King Faisal Specialist Hospital (**Riyadh**)
- Ambulatory Care Center - National Guard King Fahad Hospital (**Riyadh**)
- National Guard King Fahd Hospital (**Riyadh**)
- Dr. Sulaiman Al Habib Hospital (**Riyadh**)
- King Faisal Specialised Hospital Extension (**Riyadh**)
- King Faisal Specialist Hospital (**Riyadh**)
- National Hospital (**Riyadh**)
- Dental Hospital King Saud University (**Riyadh**)
- Specialised Medical Centere (**Riyadh**)
- East Riaydh500 Bed Hospital (**Riyadh**)
- National Guard Hospital (**Madinah**)
- Mental Healthe Hospital (**Madinah**)
- 100 Bed Hospital, (**Madinah**)
- Minna 500 Bed Hospital MOH (**Makkah**)
- MOI- Psychological Hospital (**Riyadh**)
- King Fahd Hospital (**Jeddah**)
- 100 Bed Hospital, (**Tabouk**)
- 100 Bed Hospital, (**Tabouk**)
- MODA Prince Mansour Military Hospital (**Taif**)
- 100 Bed Hospital Cardiac & Lever Plant Center (**Arar, Jouf & Quaryat**)

Source: Company Website



7 FUTURE OF THE MARKET





7 FUTURE OF THE MARKET



- The market for sanitaryware is evolving rapidly. COVID-19 has further accelerated the development of sanitaryware products. Earlier sanitaryware products were bought only by looking at the functional attributes, but now various technologically advanced features are being incorporated into the sanitaryware products. In the future, the sanitaryware market will further show advancement, and technology will be the major enabler for the development of the market.
- In the current times, Millennials and Gen Y are the major home buyers. The expectations of new buyers are different from that of the buyer of the previous generation. The present generation has different expectations of bathrooms and bathroom products. Earlier generations merely looked at the functional attribute of the bathroom. The bathroom was the least looked at, and the least spending was done, but now in the present generation, the concept of the bathroom is transforming into the wellness space of the home. People are transforming their bathrooms into a space that can help them energize at the end of the day when they reach their homes. Large spending and thought are given to designing the bathroom and uses of the sanitaryware.
- Sanitaryware with advanced technological features is going long into the future. Smart and Intelligent toilets are one of the most popular sanitaryware in the present times. Smart toilets come with automatic flushing, overflow protection, water-saving capabilities, self-deodorizing, sensor-enabled commercial LED lighting, self-cleaning features, and more. These cutting-edge toilets are quickly replacing traditional toilets in smart homes.
- Smart toilets are also associated with health benefits. In the future, internet-connected toilets with sensors will be able to examine waste. This function will help spot the first indications of chronic diseases, including cancer, diabetes, infections, and renal disease. Additionally, these restrooms will communicate information about public health and keep track of illnesses before they spread like epidemics.
- Along with smart toilets, water conservation through sanitaryware will shape the market's future. Recognizing the need for water conservation, manufacturers of sanitaryware in Saudi Arabia are developing technology that reduces water use in sanitaryware.
- With the people becoming more aware of water conservation and the government mandating lower water flow from faucets and taps, manufacturers are bound to implement water-efficient technology in their sanitaryware. The future of sanitaryware products will also be shaped by the water-conserving capacity they possess.
- Since single-flush toilets do not help much in water conservation, double-flush toilets will be more prevalent as they are somewhat water efficient. Furthermore, pressure-enabled flush toilet systems mainly used in the commercial setting will be implemented in the residential setting as they require less water while cleaning and will help conserve the water in the residential setting.

Source: Mordor Intelligence



7 FUTURE OF THE MARKET

- With the limited bathroom space available in the urban area and the need to transform the bathroom into a wellness space, Customers are selecting sanitaryware items with minimalistic, simple designs and clean lines that give off a tranquil vibe. Although eye-catching, these simple designs are never cluttered. The products like washbasins and toilets that don't look bulky and take up little room are currently in style. They are, therefore, perfect for smaller residences in cities.
- Sanitaryware products equipped with leakage detection systems will also be more popular in the future. Plumbing issues can be made less severe with the use of smart leak detectors. The sensors detect leaks and sound an alarm or send out a notice. A few sophisticated systems closed the valves to stop significant harm or water loss. They can warn the homeowner about temperature and humidity problems.
- The toilets are turning smart, meaning they can clean themselves, so customers find clean sanitaryware whenever they want to use it. Manufacturers are developing technology where sanitaryware automatically cleans itself, resulting in cleaner bathroom ware which can't be achieved in other traditional sanitaryware.
- Bathrooms now constitute an important part of the home. The bathroom now garners more funds and attention from home builders and homeowners. People recognize bathrooms to make a style statement about their home. This has created an opportunity for the sanitaryware market. Luxury and high-end sanitaryware enters consumers' houses as people want to make style statements through their bathrooms.
- The future of the sanitaryware market will be oriented more toward technology. Manufacturers are competing to make their products technologically advanced. Consumers in Saudi Arabia also favor the new advancement in sanitaryware products, so in the future, much of the competition among sanitaryware manufacturers will be on the technological front.



Source: Mordor Intelligence

8 DISCLAIMER AND ABOUT US

8.1 Industries Covered

8.2 Our Customized Research Capabilities



ABOUT US

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SNAPSHOT

On-the-ground industry experts in
100+ countries



3000+
Clients served globally



5000+
Projects delivered



350+
In-house analysts



8.1 INDUSTRIES COVERED

ICT	CHEMICALS AND MATERIALS	CONSUMER GOODS	PACKAGING
<ul style="list-style-type: none">• IoT, Big Data, M2M• Analytics• Cloud Computing• Information Technology• Data Centers• Software & Solutions• Telecommunications• IT Hardware• Internet• Security• Advanced Technologies	<ul style="list-style-type: none">• Adhesives & Sealants• Advanced Materials• Aromatics and Intermediates• Composites• Construction Chemicals & Materials• Metals, Ceramics, Industrial Materials• Paints & Coatings• Plastics, Polymers, Elastomers• Specialty & Fine Chemicals• Water & Wastewater Treatment	<ul style="list-style-type: none">• Apparel, Footwear, Accessories• Appliances• Cosmetics• Furniture• Household Care• Luxury Goods & Services• Personal Care• Recreational Goods• Sports & Fitness	<ul style="list-style-type: none">• Packaging Materials & Types• Food Packaging• Beverage Packaging• Pharmaceutical Packaging• Household Packaging• Personal Care Packaging• Industrial Packaging• Advanced Packaging• Country-Level Packaging Industry Analysis• Packaging Equipment
ELECTRONICS	ENERGY & POWER	AUTOMATION	HEALTHCARE
<ul style="list-style-type: none">• Semiconductors• Sensors• Optoelectronics• Electrical & Electronic Components• Display Technology• Security & Surveillance• Monitoring & Testing Equipment	<ul style="list-style-type: none">• Power• Oil & Gas• Renewables• Energy Efficiency• Engineering, Procurement and Construction	<ul style="list-style-type: none">• Industrial Automation & Process Control• Robotics• Engineering Products & Components• Building Automation• Logistics Automation	<ul style="list-style-type: none">• Disease Landscape• Healthcare IT• Medical Devices• Pharmaceuticals• Biotechnology• Veterinary Healthcare• Healthcare Services

8.1 INDUSTRIES COVERED

AGRICULTURE <ul style="list-style-type: none">• Agricultural Commodities• Agricultural Machinery & Tech• Crop Protection• Fertilizers & Seeds 	FOOD & BEVERAGES <ul style="list-style-type: none">• Food• Beverage• Processed Food• Food Additives & Supplements• Food Ingredients• Food Service 	AUTOMOTIVE <ul style="list-style-type: none">• Parts and Components• Automotive Technology• Manufacturing Processes• Automotive Materials & Coatings• Automotive Services• Vehicles• Machinery & Equipment 
ANIMAL NUTRITION <ul style="list-style-type: none">• Compound Feed• Feed Additives & Premixes• Pet Care• Pet Food 	AEROSPACE & DEFENSE <ul style="list-style-type: none">• Defense• Airport Operations• MRO• Technology 	OTHER GROUPS <ul style="list-style-type: none">• Logistics• Processing Technologies• Finance and Insurance• Retail• Real Estate and Construction• Tourism 

8.2 OUR CUSTOMIZED RESEARCH CAPABILITIES

7. CUSTOMER, DISTRIBUTOR, SUPPLIER INTELLIGENCE

- Identification of potential partners
- Shortlisting/finalization of potential partners
- Customer need analysis
- Customer's purchase and usage behavior
- Customer/partner feedback and satisfaction*
- Brand perception analysis*
- Key Opinion Leader Insights

6. PRODUCT INTELLIGENCE SUPPORT

- Import and Export Intelligence*
- Commodity pricing intelligence*
- Product pricing intelligence*
- Product Positioning Assessment
- New product launch tracker*
- Product claims assessment*
- Product Concept Testing

5. INVESTMENT INTELLIGENCE SUPPORT

- Project feasibility analysis
- R&D and Patent analysis support
- M&A, JV support - Scouting, shortlisting, target assessment



*Available as one time effort as well as in the form of periodic updates

1. MARKET STRUCTURE ASSESSMENT

- Macroeconomic analysis
- Value Chain and Supply Chain Analysis
- Regulatory assessment
- Technology scouting and assessment*
- Sourcing and category intelligence

2. MARKET INTELLIGENCE SUPPORT

- Market size and segmentation
- Growth opportunities
- Market dynamics and new developments*
- Go to Market Strategies

3. COMPETITIVE INTELLIGENCE SUPPORT

- Company profiling
- Competition assessment incl. market share
- Drilled down revenue estimations
- Employer value proposition

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- Data analytics and visualization
- Data collection, manipulation incl. web scraping
- B2B and B2C surveys and interviews

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