



Middle East Bathrooms

Publication Date: **March 2006**

Middle East Bathrooms Report

This report gives an in-depth insight into the development of the Middle East bathroom market in 2004. The main product sectors covered are baths, shower trays, taps and mixers, ceramic sanitary ware, plastic cisterns hydrotherapy products, ceramic tiles and Shattafs:

- Trends (volume) 1995-2004 and forecasts to 2009
- Market value & prices 2004
- Market shares (2004 & 2005)
- Distribution of bathroom products
- Company profiles

A Shattaf consists of a flexible hose and spray head and is installed with a WC and is used for personal hygienic reasons.

Market Developments

The Middle East research covers all six of the GCC states; Kuwait, Saudi Arabia, UAE, Qatar, Oman and Bahrain. The market for bathroom products in these countries, although starting from a relatively low level, has been growing rapidly over the last decade. This growth is mainly due to a large increase in new build, particularly UAE, Saudi Arabia and Qatar, while Kuwait and Bahrain are becoming more stable after a decade of strong growth.

As the bathroom market within the GCC states have been growing for several years, most of the European, American and Asian market players have entered the market as they recognized the enormous growth potential. Although there are several local manufacturers present in the

Middle East, a large share of the products is sourced from outside (Europe, Asia, US). In particular the taps and mixers market which is completely dominated by non-domestic manufacturers such as GROHE, HANSA, PAINI, ZUCHETTI, AMERICAN STANDARDS and, with no significant national companies present in the market.

The only market that is largely dominated by domestic manufacturers is the ceramic sanitary ware and ceramic tiles market, with market leaders RAK CERAMICS and SAUDI CERAMICS. SHADUBE (UAE) has a strong position in the baths and shower trays market. As with taps and mixers, the hydrotherapy and shower wall markets are almost entirely dominated by non-domestic companies, either sourcing their products from Europe) or Asia (mainly the cheaper imports which also have a significant impact on the market).

The Middle East bathroom market is largely a project driven market. The retail chain is growing stronger however and several foreign manufacturers increasingly aim at the distributors with showrooms.

In terms of the different bathroom products, the market for ceramic sanitary ware in particular is a key indicator for overall growth. Within all markets, these products have shown strong growth in 2004, from a low of 6.3% in Bahrain to almost 17% in Oman. Unlike most European countries, the market for bathroom furniture does not have a significant impact on the overall ceramics market, although this is expected to change in the future as more and more manufacturers enter the country.

Middle East Bathrooms

In the Middle East there exists a so-called "bath culture", in which shower trays are only sold to the lower segments of the markets, although this is changing slightly because of increasing demand for shower trays from expatriates. Also the number of taps and mixers being sold is comparatively high, largely due to short life cycles as a result of bad water quality. The shattaf market in the Middle East is mainly there for cultural and religious reasons, and has a fairly high replacement rate, not only because of poor quality, but also because of hygienic beliefs.

The forecast for all six markets is favourable, with the continuation of growth in all states, although some states are growing faster than others. Future growth will be largely dependent on new build, as the overall renovation market is almost insignificant compared to new build. Qatar and UAE are expected to continue growing, mainly due to new build in the tourist and business sector, while Saudi Arabia is constructing more houses for its fast growing population. Kuwait and Bahrain are expected to more or less stabilise, having already registered their growth peaks over the last decade. Oman however has only recently and for the first time started growing, and this is also expected to continue at a rapid rate.



For more information about the content of these studies or if you are interested in acquiring one or more of these reports, please contact us.

CONTACT US

Henk van den Berg
Middle East Manager
Email: hvandenber@consultgb.com

Consult GB
The Clocktower
27-39 St Georges Street
Canterbury Kent CT1 2LE England
Tel: +44 (0) 1227 766 810
Fax: +44 (0) 1227 766 811

Table of Contents

1. BACKGROUND

- 1.1 GEOGRAPHY & DEMOGRAPHICS
- 1.2 HOUSEHOLDS & HOUSING
- 1.3 MACRO ECONOMIC TRENDS
- 1.4 CONSTRUCTION
- 1.5 PARK
- 1.6 STRUCTURE OF DEMAND
- 1.7 LEGISLATION

2. BATHROOM PRODUCTS MARKET OVERVIEW

- 2.1 OVERALL BATHROOM PRODUCT MARKETS
- 2.2 OVERALL PRICES AND MARKET VALUE
- 2.3 OVERALL STRUCTURE OF SUPPLY

3. BATHS AND SHOWER TRAYS

- 3.1 MARKET SIZE, TRENDS AND SEGMENTATION
 - 3.11 Baths (cast Iron, Steel, Synthetic)
 - 3.12 Shower Trays (Ceramic, Steel/C. Iron, Synthetic)
- 3.2 MARKET VALUES AND PRICES
 - 3.2.1 Baths
 - 3.2.2 Shower Trays
- 3.3 SUPPLY / MARKET SHARES
- 3.4 IMPORT/EXPORTS

4. CERAMIC SANITARY WARE AND ALTERNATIVES

- 4.1 MARKET SIZE, TRENDS AND SEGMENTATION
 - 4.11 CERAMIC SANITARY WARE
 - WCs (floor standing / wall hung)
 - WC cisterns
 - washbasins/countertops
 - hand washbasins
 - bidets
 - urinals
 - sinks
 - shower trays
 - 4.12 Non-Ceramic Sanitary Ware (Plastic Cisterns)
- 4.2 MARKET VALUES AND PRICES
 - 4.2.1 CERAMIC SANITARY WARE
 - 4.2.2 Non-Ceramic Sanitary Ware (Plastic Cisterns)
- 4.3 SUPPLY / MARKET SHARES
 - 4.3.1 Ceramic Sanitary Ware
 - 4.3.2 Plastic Cisterns
 - Concealed Plastic Cisterns
 - Exposed Plastic Cisterns
- 4.4 IMPORTS/EXPORTS

5. TAPS AND MIXERS AND SHOWER ACCESSORIES

- 5.1 MARKET SIZES, TRENDS AND SEGMENTATION
 - Historical Trends, 2004 Market and Forecasts to 2009
 - Market Analysis by Type of Product
 - Pillar Taps
 - Two Head Mixers

- One Head Mixers
- Thermostatic Mixers
- 5.2 MARKET VALUES AND PRICES
 - Market Value
 - Prices and Price Segmentation
- 5.3 SUPPLY / MARKET SHARES
- 5.4 IMPORTS/EXPORTS
- 5.5 SHOWER ACCESSORIES

6. SHOWER WALL PRODUCTS

- 6.1 MARKET SIZE, TRENDS AND SEGMENTATION
 - Shower Enclosures
 - Bath Screens
 - Conventional Shower Cubicles
- SALES BY TYPE OF MATERIAL (GLASS/PLASTIC)
- ENCLOSURES SALES BY TYPE:
 - Door
 - Side Wall
 - Corner Entry
 - Round
 - 5 Angle
- ENCLOSURES SALES BY DOOR TYPE:
 - Sliding
 - Hinged
 - Folding
 - Pivoting
- 6.2 SHOWER WALL PRODUCTS: MARKET VALUES AND PRICES
- 6.3 SUPPLY / MARKET SHARES

7. HYDROTHERAPY PRODUCTS

- 7.1 MARKET SIZE, TRENDS AND SEGMENTATION
 - HISTORICAL TREND, 2004 MARKET AND FORECAST TO 2009
 - Hydromassage Baths
 - Hydrotherapy Cubicles
 - Shower Panels
 - Combined Products
- 7.2 HYDROTHERAPY PRODUCTS: MARKET VALUES AND PRICES
- 7.3 SUPPLY / MARKET SHARES

8. OTHER BATHROOM PRODUCTS

- 8.1 THE SHATAFF MARKET

9. TILES

- 9.1 MARKET SIZE, TRENDS AND SEGMENTATION
- 9.2 MARKET VALUES AND PRICES
- 9.3 SUPPLY

9. DISTRIBUTION

- 9.1 STRUCTURAL ANALYSIS

APPENDIX A: MANUFACTURER PROFILES

Clients

Our Clients

Consult GB is worldwide regarded as the market leading supplier of information in the heating and bathroom industry. With over 30 years' experience, we have built up a close relationship with the industry. Among our bathroom clients are:

- KERAMAG/SANITEC
- VILLEROY & BOCH
- ROCA
- IDEAL STANDARD
- KOHLER
- GEBERIT
- GROHE
- HANSGROHE
- KLUDI
- NOVELLINI
- INDA
- SEALSKIN
- ALLIBERT
- ARMATURA
- CERSANIT
- SANPLAST
- EKOM/VITRA
- FORTUNE BRANDS
- DAMIXA
- GEORG FISCHER
- LUCITE
- KERMI
- MOEN
- ORAS
- JACUZZI
- TEUCO
- TOPRAK
- ZUCCHETTI

The No. 1 in the Industry:

"During a long term relationship with GROHE, CONSULT GB has developed an unparalleled research facility on the European bathroom products market, combining a high level of reliability and accuracy with a pan-European perspective."

Dr Reinhard Häufele: Vice President Corporate Development, **GROHE**

"It is CONSULT GB which provides our industry with the most coherent and comprehensive market information service available on a European scale."

Gerd Zinke: Vice President Marketing, **AMERICAN STANDARD**

"We've found CONSULT GB to be a very valuable source of information on the European markets."

Manuel Gutierrez: Director - Market Research, **KOHLER**
(Kitchen & Bathroom Group)

"I have shared with CONSULT GB a long experience in the European bathrooms industry and I consider them to be pre-eminent in their field. Their annual report on the European bathrooms market has become a standard work in the industry".

Ton van Osch: Market Intelligence Manager **VILLEROY & BOCH**