



**International
Market
Strategy**



**International strategic market research and
consultancy on building product and related markets**

April 2006

**PROPOSAL FOR A SYNDICATED RESEARCH
PROGRAMME ON BATHROOM PRODUCT
MARKETS IN THE USA AND CANADA**



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1. INTRODUCTION

BRG CONSULT has established itself as the leading provider of international industrial market research on bathroom products within the global framework. Its annual coverage of 30 countries in Europe has become a standard source of market information within the European bathroom products industry and its gradual expansion to markets further afield has been continuous.

Since its integration into the BRG Group, BRG CONSULT has enjoyed the benefits of being part of a dynamic and growth driven organisation. One such benefit has been the establishment of a 30 employee office in New Jersey through which BRG CONSULT will operate its North American Building Products division with a view to providing a similar service across the pond to its current offering in Europe.

One of the first phases of this development is to re-launch the North American Bathrooms products update (USA and Canada) in 2006.

Therefore, BRG CONSULT is pleased to present this proposal for a multi-client programme covering the two North American markets. The proposal which follows sets out the scope of such a study, the content and reporting formats, how BRG CONSULT would conduct it, and the timing and costs which would be involved.

2. SCOPE

2.1 PRODUCT SCOPE

The product scope for this proposed survey would be based on BRG CONSULT's current World coverage. This would therefore consist of:

- baths (roman/soaker tubs)
 - cast iron
 - steel: stainless/enamelled
 - synthetic
 - gel coat
 - acrylic
- shower trays
 - ceramic
 - steel/cast iron
 - synthetic
- ceramic sanitary ware
 - fireclay and fine fireclay by type of product
 - porcelain by type of product
- sanitary taps and mixers (faucets)
 - single lever mixers by type of product and application
 - two head mixers/three hole by type of product and application
 - four inch center sets by type of product and application
 - pillar taps by type of product and application
 - thermostatic mixers by type of product and application
 - pressure balance valves
- shower wall products
 - shower enclosures
 - bath screens

- conventional shower cubicles
- hydrotherapy products
 - hydromassage baths (jetted tubs)
 - hydrotherapy shower cubicles
 - combined products
 - shower panels.

CONSULT GB would also identify any other sanitary product specific to the two proposed countries and attempt to define and quantify these markets.

CONSULT GB is not however envisaging undertaking bathroom furniture, ceramic tiles or accessories within the scope of this study. Any focus on these products could be undertaken as special projects should clients so desire.

2.2 GEOGRAPHICAL SCOPE

The study would cover the whole of the USA and Canada.

2.3 TIMESCALE

The base year for the study would be 2005 with forecasts to 2010. Historical trends would start at 1995.

3. CONTENT AND FORMAT

3.1 CONTENT

The overall content of each country report will follow much the same lines as BRG CONSULT's European bathrooms reports as they will be generated by the now well known FILEMAKER global bathroom products database. The reports will contain all the quantitative and qualitative data relevant to a comprehensive market study. The layout and content is therefore proposed as follows:

- **Product/Market Summaries and Forecasts (“Yellow Pages”)** for each product family:
 - comments on recent market trends and developments
 - volume sales trends 1995-2005 and forecasts 2006-2010
 - market values and average prices
 - segmentation by product type/material
 - distribution flow summary
 - volume sales and market shares of the main competitors (by holding and subsidiary).

These detailed but condensed summaries in graphic format represent a well known and much appreciated feature of BRG CONSULT's reports. They also form the heart of the interactive database.

The main body of the report is proposed as follows:

- **Introduction and Glossary**
- **Section 1: Background**
 - Geography and Administration
 - Population and Demographic Trends
 - Households and Housing Stock
 - Macro-Economic Trends and Employment Patterns
 - Construction
 - Legislation, Regulations Controls and Incentives
 - Structure of demand for bathroom products
- **Section 2: Bathroom Products Market – Overview**

- Total Bathroom Products Market
- Overall Structure of Supply
- **Section 3: Baths and Shower Trays**
 - Market Size, Trends and Segmentations
 - Prices and Market Values
 - Supply by type of product and material
- **Section 4: Ceramic Sanitary Ware and Alternatives**
 - Market Size, Trends and Segmentations
 - Prices and Market Values
 - Supply
- **Section 5: Sanitary Taps and Mixers and Other Related Products**
 - Sanitary Taps and Mixers
 - Market Size, Trends and Segmentations
 - Prices and Market Values
 - Supply
 - Other Related Products
 - Self Closing Taps
 - Shower Accessories
- **Section 6: Shower Wall Products**
 - Market Size, Trends and Segmentations
 - Prices and Market Values
 - Supply by type of product

- **Section 7: Hydrotherapy Products**
 - Market Size, Trends and Segmentations
 - Prices and Market Values
 - Supply by type of product
- **Section 8: Other Bathroom Products**
 - coverage in summary form of product categories not studied in depth within the annual programme. Varies by country
- **Section 9: Distribution**
 - Overall Patterns and Characteristics
 - Structure: Wholesaling/Merchanting Trades
 - Structure: DIY Retailing
 - Structure: Other Relevant Retail Trades
 - Product Distribution Flows
- **Appendix: Company Profiles**
 - Profiles of the leading manufacturers, importers and distributors of bathroom products, including national subsidiaries of international groups. These Profiles will be created on the database.

3.2 FORMAT

As mentioned above, both the USA and Canada will each have an individual report so that they may be separated if need be. However BRG CONSULT is proposing to offer the 2 studies as a “North American package”. Data will be entered into our database so that clients can add these new studies to their existing database services.

The studies will be published both in electronic format (PDF and interactive CD version) together with one paper copy per subscription.

4. METHOD AND TIMING

4.1 METHOD

CONSULT GB's proven methodology for its multi-client studies is based on classic empirical industrial market research techniques including:

- research of relevant secondary sources in depth
- personal and telephone interviews with:
 - manufacturers
 - importers
 - distributors
 - official bodies.

The project will be managed from New Jersey by Edward Dinicola who will be involved in the interview programme. Overall project supervision will be the responsibility of Dominic Denison-Pender (Managing Director).

4.2 TIMING

BRG CONSULT will be launching the project following KBIS (Kitchen/Bath Industry Show) with a view to delivering a final report in July.

5. PRICES

BRG CONSULT is proposing subscribers a price per order of:

- USA: £3,000 / \$5,250 / €4,425
- Canada: £3,000 / \$5,250 / €4,425
- USA + Canada package: £5,000 / \$8,750 / €7,375
- **Pre-Launch Package*:** **£4,500 / \$7,850 / €6,625**

Note*: Pre-launch package available until 15th May.

