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Bathroom Newsletter

February 2026

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CONSULT GB NEWS

CHINA BATHROOM SPECIAL

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

Sweden: SVEDBERGS I DALSTORP AB to cooperate with STYLE PRODUCT LTD

26 January 2006

The Swedish bathroom interior company SVEDBERGS I DALSTORP AB announced that it has signed a cooperation agreement with the UK-based sales company STYLE PRODUCTS LTD. STYLE PRODUCT LTD, based in Manchester, distributes bathroom products in the UK and Ireland.

Source: Nordic Business Reports

India: Spain's ROCA leads race to buy 50% in PARRYWOOD

5 January 2006

EID PARRY INDIA LTD has taken the decision to separate their sanitary division, PARRYWARE, into a new company. Following this decision, the company is looking for partners to offload about 50% of its stake in PARRYWARE. The company is in discussion with various players such as ROCA, KOHLER, DURAVIT and AMERICAN STANDARDS. However, it is said that the ROCA GROUP is leading the race for the stake. EID PARRY expects to finalise the deal by April-May 2006.

Source: Indian Business Insight

Mexico: TOTO plans bathroom fixture plant in Mexico

30 January 2006

TOTO LTD. announced that it will build a plant in the state of Neuvo Leon in Mexico. The construction is planned to start in the beginning of 2007 and will cost around 30.3 euros. The new plant will manufacture bathroom fixtures including high-end toilets for sale to the United States. The capacity will be around 500,000 units of bathroom fixtures per year, and will employ 260 workers locally.

Source: Dow Jones International News

USA: CLEARWATER COLLECTION to expand to America

30 January 2006

CLEARWOOD COLLECTION, one of the biggest free-standing bath manufacturers in Europe, is expanding its sales area with America. The company is momentarily already active in 20 other countries, in which America should increase the turnover by over 4.5 million euros to an overall turnover of 15 million euros. CLEARWATER COLLECTION employs 79 people at its factory in Bratford, but also has its own companies in India and China.

Source: Prime Tass news

Russia: ROCA to open factory in Russia

25 January 2006

Spain's ROCA plans to complete construction of the first stage of a 45 million euro bathroom equipment factory in the town of Tosno in Russia's Leningrad Region in June 2006. Although the plant will be opened in June, the first batch of bathroom equipment will be produced in April. The factory will have an annual output of 550,000 pieces per year. The second stage of the factory is expected to be build by 2008 and requires and additional investment of 8 million euros. After the completion of the second stage, the factory will have an output of 1.2 million pieces per year. The construction started end 2004.

Source: Prime Tass News

Germany: ECZACIBASI buys German ENGERS KERAMIK GMBH

29 *December 2005*

Turkeys ECZACIBASI BUILDING GROUP bought German ceramics institution ENGERS KERAMIK GMBH, a company that has been active in the ceramics market since 1911. The company was taken over for nearly 20 million euros. ENGERS which is located in the center of the German ceramic sector (Rheinland Pfalz region) has 2.3 million cubic meters of annual production capacity. After this purchase, ECZACIBASI share in the ceramics market will reach around 5%.

Source: Anadolu Agency

Sweden: OPTIMERA buys Swedish EKBOMS

10 January 2006

Norwegian building materials retailer OPTIMERA announced early January 2006, that the company had taken over Swedish based EKBOMS from its chief executive Per Axelson for an undisclosed sum. The deal was closed via OPTIMERA's Swedish unit, OPTIMERA SVENSKA AB. OPTIMERA is part of the French glass and building materials group SAINT GOBAIN, and has a strong market position in Southern Sweden and started an expansion to other regions of the country in December 2005, when it bought local construction material retailers BYGGA I VARMLAND and P E BYGGPRODUCTER AB, both located in western-central Sweden.

Source: OPTIMERA SVENSKA AB

China: OEM business to stay strong in 2006

January 2006

Most of the ceramic sanitary exports from China to the US and Europe will still mostly consist of OEM products. This trend is forecasted to continue, especially with the mainland products, of which 70% involve OEM contracts. Companies involved in these segments are still to create strong brand names with strong reputations.

In contrast, the Indian ceramic sanitary ware industry is already doing good business through own-brand manufacturing.

Source: Dow Jones Reuters

UK: GEBERIT to launch customer campaign

January 2006

GEBERIT LTD, the specialist in frame systems for wall mounted sanitary ware will launch a major consumer campaign in the UK. The campaign will be launched in April 2006 and is set to inspire the general public about the wall hung look and dispel people's fears about the technology. The wall hung market is one of the fastest growing markets in the UK and is estimated to continue growing in future years.

Source: www.geberit.co.uk

A Division of Business Research Group

CONSULT GB NEWS

CONSULT GB has published all of its updates on the bathroom markets in Europe. Click on the links below to view more information:

Western Europe (16):

- France
- UK
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- Belgium
- Netherlands
- Austria
- Switzerland
- Portugal
- Greece
- Ireland
- Denmark
- Sweden
- Norway
- Finland

Eastern Europe (14):

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- Poland
- Czech Republic
- Slovakia
- Hungary
- Romania
- Croatia
- Rep Slovenia
- Bulgaria
- Estonia
- Lithuania
- Latvia
- Ukraine
- Turkey

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Country Special: China

Overall Country Background

China covers a total area of 9.6 million km² and extends about 4,000 km from north to south and 4,800 km from east to west. Climatically, China is dominated by monsoonal characteristics. Cold air masses build up over the Asian land mass in winter, and the prevailing winds are offshore and dry. In summer this pattern is reversed, and the rainy season is concentrated in the summer months over the most densely populated parts of the country in the east and the south. Running from south to north there are six broad temperature zones: tropical, sub-tropical, warm-temperate, temperate, cold-temperate and Qinghai-Tibet plateau area.

Administratively, China is divided into 22 provinces, 5 autonomous regions and 4 municipalities in 6 geographic regions: North, Northeast, East, Mid-South, Southwest and Northwest. Provinces, autonomous regions and municipalities are further divided into prefectures and counties. Cities and prefectures are on the same administrative level. There were 662 cities in China by the end of 2001, of which Beijing, Shanghai, Tianjin and Chongqing are municipalities. The East is the region with the highest number of cities, and with most of the large cities, while most of the smaller Chinese cities are concentrated in the Northwest. Guangdong is the province with the most cities, and Tibet is the region with the fewest.

Housing Development

There were about 374 million households registered in China in 2004, of which about 181 million were urban households (48% of total) and 193 million are rural households (52% of total), indicating a striking imbalance in the distribution of households across China. The housing stock has been growing rapidly since 2000 with the boom in new construction in China. Housing saw continuous growth in 2004 after the previous peak in 2001. The total floor space by the end of 2004 was estimated at 32 billion m² up by 10% compared to 2003, accounting for about 336 million dwellings, up 6% from the previous year.

Most dwellings are new in China, built after 1977, when China started its economic reform. About 93% of the housing stock was built after 1977, of which 77% was built after 1990, and 16% was built between 1977 to 1989. The growth in new housing was driven by the privatisation of land in rural areas, housing reforms in urban areas and the general improvement of people's living standards. The urbanisation and city demolition programmes also stimulated the construction of new houses in the 1990s. During the Cultural Revolution (1966-1976), almost no new houses were built. About 7% of the 375 million houses date back 40-55 years, and were built during the first 10-15 years after the establishment of the People's Republic of China. About 2 million dwellings, only 1% of the total housing, were built before 1949.

Multi-flats and high rise flats (46%) are most common in urban areas due to the high density of the population, while ordinary houses (51%, mainly communal houses, terraced or detached houses) are more common in rural areas. In addition, there are a few expensive apartments and villas (3%) built mainly in large cities or suburbs after 1990.

Special: China Bathrooms market

2004 Market and Forecasts

China, as a country, has seen tremendous economical growth over the last decade or so.
In line with these trends, the baths, hydromassage baths, shower trays and shower enclosures markets have all seen consistent growth throughout the 1990s and are all predicted to continue to grow over the next 5 years. Although the growth for the shower tray, shower enclosure and hydrotherapy markets was very impressive compared to other bathroom products, this was mainly due to the fact that they came from fairly low levels of sales.

The main reasons for the continuation of growth in the next five years will be:

- the development of Western China according to the 10th Five Year Plan. Since 2000 there have been massive new house building programs in the region

- new house building industry has become one of 5 main principal industries at the centre of the 10th Five Year Plan. Non-housing and infrastructure should also see massive development

- housing amenities should develop quickly due to the growth in RMI. The average size of bathrooms should increase from the current average of 3-4 m^2 by 2005

- the population is forecast to reach 1.4 billion by 2005

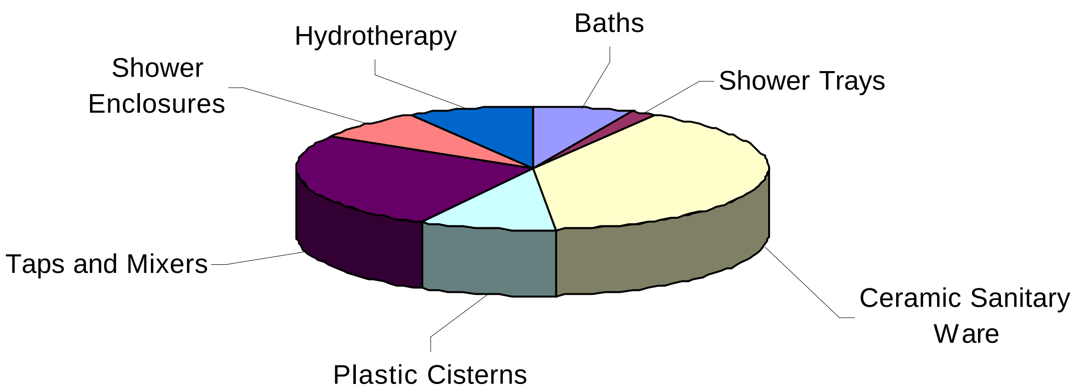
- the government will further regulate the market, which will ban the production of old fashioned and poor quality products such as cast iron mixers. More water saving and environmental products will be developed, e.g. cisterns with over 6 litre flush may be stopped

- GDP is forcast to rise by 7.5% per year, further boosting living standards.

China is the largest producer of ceramic sanitary ware in the world and the table below clearly shows that the main bathroom product in China is also ceramic sanitary ware. Taps and mixers are the second most important product group. The other bathroom product markets are much smaller. The baths market remains relatively small compared to ceramic sanitary ware and mixers. Baths are quite expensive to use in China due to shortages of hot and cold water supply, and public bathrooms still provide a popular alternative to fitting a bath in private family bathrooms.

Unlike European markets, import volumes are very small, and the vast majority of all bathroom products are manufactured in China. Chinese production of bathroom products has traditionally focused on ceramic sanitary ware, taps and mixers, and baths (cast iron and steel). New areas of manufacturing include synthetic baths and shower trays, shower wall products and hydromassage products. Although the volume of exports has increased rapidly during the 1990s, exports account for only a small proportion of total Chinese production. Although China really requires all its domestic production to satisfy the huge demand from the home market, the government has encouraged exports of bathroom products through tax breaks. While Chinese production capacity is overall sufficient, given the generally low level of amenities in the country, domestic supply is unable to satisfy the demand for higher quality bathroom products in China.

Overall Sales Value of Bathroom Products in China by Product Type



[I would like to buy the China Bathrooms Report]