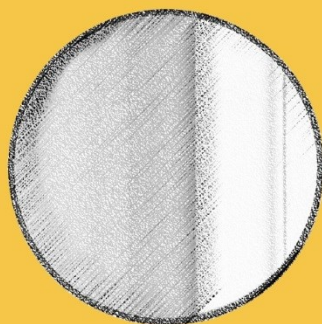




July 2022
S12 – R3594

THE EUROPEAN MARKET FOR BATHROOM FURNITURE, FURNISHINGS AND WELLNESS



-  FURNITURE
-  UPHOLSTERED FURNITURE
-  MATTRESSES
-  OFFICE & WORKPLACE
-  CONTRACT FURNITURE
-  OUTDOOR FURNITURE
-  KITCHEN FURNITURE
-  BATHROOM FURNITURE
-  MAJOR APPLIANCES
-  LIGHTING FIXTURES

A global perspective of the furniture sector with insights into all furniture segments and in-depth knowledge of the entire value chain.



CSIL publications are available
for online purchase
www.worldfurnitureonline.com

Reports are also available in printed form.
For further information, please contact:
csil@csilmilano.com





BATHROOM FURNITURE

July 2022
S12 – R3594

THE EUROPEAN MARKET FOR BATHROOM FURNITURE, FURNISHINGS AND WELLNESS

© Copyright CSIL



All rights reserved. Neither this publication nor any part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission by CSIL. Any such action is an infringement of Italian Law (Law 18 August 2000 no. 248) and may give rise to legal action for damages and may be prosecuted as a criminal offence.

All information in this report is verified to the best of the author's and the publisher's ability. However, CSIL does not accept responsibility for any errors and/ or omissions resulting from any source and for any loss arising from reliance on it.



TABLE OF CONTENTS

METHODOLOGY	6
Table 0.1 Exchange rates between national currencies and EUR, 2016-2021. Yearly average	7
1. BASIC DATA	9
1.1 European market for bathroom sector	9
Figure 1.1 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by product, 2021. Million Eur, % share in value	9
Table 1.1 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by product, 2020-2021. Eur million at factory prices and percentage change in value	10
Table 1.2 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by product, 2021. Eur million at factory prices, thousand units and average factory prices	10
Figure 1.2 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by country, 2021. % share in value	11
Table 1.3 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by country, 2020-2021. Eur million at factory prices and percentage change in value	11
1.2 Construction activity and bathroom stock in Europe	12
Figure 1.3 Europe. European building stock. Breakdown by sector. Square metre	12
Figure 1.4 Europe. Residential floor space per capita. Square metre	12
Figure 1.5 Europe. Housing construction for selected countries. Share of housing completed as a percentage of the total existing housing stock. 2010 and 2021	13
Table 1.4 Europe. Residential buildings stock and breakdown by equipment. Million units and % share, 2021.	13
Table 1.5 Europe. Total bathroom stock and breakdown by segment. Thousand units, 2021.	14
2. ACTIVITY TREND AND FORECASTS	15
2.1 The bathroom furniture, furnishings and wellness sector in Europe	15
Table 2.1 Europe. The bathroom furniture, furnishings and wellness sector and comparison with economic indicators, 2016-2021	16
Table 2.2 Europe. Economic indicators. Forecasts, 2022-2025	16
2.2 Northern Europe	17
Denmark	17
Finland	18
Norway	19
Sweden	20
2.3 Western Europe	21
Belgium	21
France	22
Ireland	23
United Kingdom	24
2.4 Central Europe	25
Austria	25
Germany	26
Netherlands	27
Switzerland	28
2.5 Southern Europe	29
Greece	29
Italy	30
Portugal	31
Spain	32
2.6 Eastern Europe	33
Poland	33
Czech Republic, Hungary and Slovakia	34



Bulgaria, Croatia, Romania and Slovenia	35
3. MARKET STRUCTURE	36
Table 3.1 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by segment, 2019-2020-2021. Eur million at factory prices and percentage share	36
Table 3.2 Europe. Bathroom furniture, furnishings and wellness. Estimated sales by segment in a sample of companies, last available year. % share	37
3.1 Bathroom vanities	38
Figure 3.1 Europe. Bathroom vanities. Estimated consumption in Europe by product, 2019-2021. Million Eur, Thousand Units, % change 2019-20, % change 2020-21	38
3.2 Showers	38
Figure 3.2 Europe. Showers. Estimated consumption in Europe by product, 2019-2021. Million Eur, Thousand Units, % change 2019-20, % change 2020-21	39
3.3 Faucet	39
Figure 3.3 Europe. Faucet. Estimated consumption in Europe by product, 2019-2021. Million Eur, Thousand Units, % change 2019-20, % change 2020-21	40
3.4 Ceramic hydrosanitary	40
Figure 3.4 Europe. Ceramic hydrosanitarities. Estimated consumption in Europe by product, 2019-2021. Million Eur, Thousand Units, % change 2019-20, % change 2020-21	40
3.5 Bathtubs	41
Figure 3.5 Europe. Bathtubs. Estimated consumption in Europe by product, 2019-2021. Million Eur, Thousand Units, % change 2019-20, % change 2020-21	41
4. FINANCIAL ANALYSIS	42
4.1 Financial results	42
Figure 4.1 Europe. Bathroom sector (*). Sample size, operating revenues (turnover), EBITDA, net income, 2015-2018. Million EUR	42
Table 4.1 Europe. Bathroom sector (*). Key financial data and ratios. 2016-2020	43
Table 4.2 Europe. Bathroom sector (*). Profitability indicators (ROI, ROE, EBIT, EBITDA) in a sample of companies. 2020	44
Table 4.3 Europe. Bathroom sector (*). ROI (%) in a sample of companies. 2016-2020	45
Table 4.4 Europe. Bathroom sector (*). EBITDA (%) in a sample of companies. 2016-2020	46
Table 4.5 Europe. Bathroom sector (*). Financial structure indicators (Assets, Shareholder funds, Cash flow, solvency ratio) in a sample of companies. 2020	47
4.2 Employment	48
Figure 4.2 Europe. Bathroom sector (*). Number of employees, 2016-2020. Million Eur	48
Table 4.6 Europe. Bathroom sector (*). Labour indicators (number of employees, turnover per employee, av. cost of employee, cost of empl./turnover) in a sample of companies. 2020	49
Table 4.7 Europe. Bathroom sector (*). Number of employees for a sample of 60 companies, 2016-2020.	50
Figure 4.3 Europe. Bathroom sector (*). Number of employees and average turnover per employee in a sample of companies, 2020	51
5. DISTRIBUTION	52
5.1 Distribution channels	52
Figure 5.1 Europe. Bathroom furniture, furnishings and wellness. Estimated sales by distribution channel by product, 2019-2020-2021. Million Eur, average % change 2019+2020, percentage share in value	53
Table 5.1 Europe. Bathroom furniture, furnishings and wellness. Estimated sales by distribution channel by product, 2021. Percentage share in value	54
Table 5.2 Europe. Bathroom furniture, furnishings and wellness. Estimated sales by distribution channel by product, 2021. Eur million	54
Table 5.3 Europe. Bathroom furniture, furnishings and wellness. Estimated sales by distribution channel in a sample of companies, last available year. % share	55
Northern Europe	55
Table 5.4 Northern Europe. Bathroom furniture, furnishing and wellness stores, 2021	57



Western Europe	57
Table 5.5 Western Europe. Bathroom furniture, furnishing and wellness stores, 2021	59
Central Europe	60
Table 5.6 Central Europe. Bathroom furniture, furnishing and wellness stores, 2021	62
Southern Europe	64
Table 5.7 Southern Europe. Bathroom furniture, furnishing and wellness stores, 2021	65
Eastern Europe	68
Table 5.8 Southern Europe. Bathroom furniture, furnishing and wellness stores, 2021	69
5.2 A selection of contacts for the Contract market: architectural offices	70
5.3 Prices	92
Table 5.9 Europe. Bathroom furniture, furnishings and wellness. Estimated sales in Europe by product, 2021. Eur million at factory prices, thousand units and average factory prices	92
Table 5.10 Standard retail prices for bathroom furniture in Europe for a sample of companies, 2022. Eur	94
Table 5.11 Standard retail prices for bathroom furnishings/accessories in Europe for a sample of companies, 2022. Eur	94
Table 5.12 Standard retail prices for bathroom mirrors in Europe for a sample of companies, 2022. Eur	95
Table 5.13 Standard retail prices for shower screens in Europe for a sample of companies, 2022. Eur	96
Table 5.14 Standard retail prices for shower arms in Europe for a sample of companies, 2022. Eur	97
Table 5.15 Standard retail prices for shower trays in Europe for a sample of companies, 2019. Eur	97
Table 5.16 Standard retail prices for whirlpools bathtubs in Europe for a sample of companies, 2022. Eur	97
Table 5.17 Standard retail prices for bathroom faucets in Europe for a sample of companies, 2022. Eur	98
Table 5.18 Standard retail prices for kitchen faucets in Europe for a sample of companies, 2019. Eur	98
Table 5.19 Standard retail prices for wc seats in Europe for a sample of companies, 2022. Eur	99
Table 5.20 Standard retail prices for ceramic sanitary ware in Europe for a sample of companies, 2022. Eur	99
Table 5.21 Standard retail prices for acrylic sinks in Europe for a sample of companies, 2022. Eur	100
Table 5.22 Standard retail prices for acrylic bathtubs in Europe for a sample of companies, 2022. Eur	100
5.4 Furniture demand in a selected sample of cities and brands glocalization	101
Table 5.23 Selected European cities. Population, 2013 and 2018 estimates, 2023 forecast. Thousand, average annual growth rate 2018-2023	102
Table 5.24 Selected European cities. GDP, 2013 and 2018 estimates, 2023 forecast. EUR million, average annual growth rate 2018-2013	103
6. COMPANY MARKET SHARES BY PRODUCT	164
6.1 Total bathroom sales in Europe	164
Table 6.1 Total Bathroom Sector. Estimated sales in Europe and market shares of a sample among the leading companies, 2021.	169
6.2 Bathroom sales in Europe by product	170
Bathroom furniture	170
Table 6.2 Bathroom furniture. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	174
Bathroom furnishings/accessories, mirrors	175
Table 6.3 Bathroom furnishings/accessories. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	176
Table 6.4 Bathroom mirrors. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	177
Shower screens	178
Table 6.5 Shower screens. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	180
Shower arms	181
Table 6.6 Shower arms. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	181
Shower trays	182



Table 6.7 Shower trays. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	182
Whirlpool bathtubs and multifunctional shower booths	183
Table 6.8 Whirlpool bathtubs. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	184
Table 6.9 Multifunctional shower booths. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	184
Bathroom faucets	185
Table 6.10 Bathroom taps, faucets. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	186
Kitchen faucets	187
Table 6.11 Kitchen taps, faucets. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	188
WC seats	188
Table 6.12 Wc seats. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	189
Ceramic sanitary ware	190
Table 6.13 Ceramic sanitary ware. Estimated sales in Europe and market shares of a sample among the leading companies, 2021	191
Acrylic sinks	192
Table 6.14 Acrylic sinks. Estimated sales in Europe and market shares of a sample among the leading companies	192
Bathtubs	193
Table 6.15 Bathtubs. Estimated sales in Europe and market shares of a sample among the leading companies	194
7. COMPANY MARKET SHARES BY COUNTRY	195
7.1 Northern Europe	195
Denmark	195
Table 7.1 Total Bathroom Sector. Estimated sales in Denmark and market shares of a sample among the leading companies, 2021	196
Finland	197
Table 7.2 Total Bathroom Sector. Estimated sales in Finland and market shares of a sample among the leading companies, 2021	198
Norway	198
Table 7.3 Total Bathroom Sector. Estimated sales in Norway and market shares of a sample among the leading companies, 2021	199
Sweden	199
Table 7.4 Total Bathroom Sector. Estimated sales in Sweden and market shares of a sample among the leading companies	201
7.2 Western Europe	202
France	202
Table 7.5 Total Bathroom Sector. Estimated sales in France and market shares of a sample among the leading companies, 2021	203
Belgium	204
Table 7.6 Total Bathroom Sector. Estimated sales in Belgium and market shares of a sample among the leading companies, 2021	205
United Kingdom and Ireland	205
Table 7.7 Total Bathroom Sector. Estimated sales in the United Kingdom and market shares of a sample among the leading companies, 2021	209
Table 7.8 Total Bathroom Sector. Estimated sales in Ireland and market shares of a sample among the leading companies, 2021	210
7.3 Central Europe	211
Austria	211



Table 7.9 Total Bathroom Sector. Estimated sales in Austria and market shares of a sample among the leading companies, 2021	212
Germany	213
Table 7.10 Total Bathroom Sector. Estimated sales in Germany and market shares of a sample among the leading companies, 2021	214
The Netherlands	215
Table 7.11 Total Bathroom Sector. Estimated sales in the Netherlands and market shares of a sample among the leading companies, 2021	217
Switzerland	218
Table 7.12 Total Bathroom Sector. Estimated sales in Switzerland and market shares of a sample among the leading companies	219
7.4 Southern Europe	220
Italy	220
Table 7.13 Total Bathroom Sector. Estimated sales in Italy and market shares of a sample among the leading companies, 2021	221
Greece	222
Table 7.14 Total Bathroom Sector. Estimated sales in Greece and market shares of a sample among the leading companies, 2021	222
Spain and Portugal	222
Table 7.15 Total Bathroom Sector. Estimated sales in Spain and market shares of a sample among the leading companies, 2021	224
Table 7.16 Total Bathroom Sector. Estimated sales in Portugal and market shares of a sample among the leading companies, 2021	225
7.5 Eastern Europe	225
Poland and Baltics	225
Table 7.17 Total Bathroom Sector. Estimated sales in Poland and the Baltics and market shares of a sample among the leading companies, 2021	226
Czech Republic, Hungary and Slovakia	226
Table 7.18 Total Bathroom Sector. Estimated sales in Czech Republic, Hungary and Slovakia and market shares of a sample among the leading companies, 2021	227
Croatia, Slovenia, Bulgaria and Romania	227
Table 7.19 Total Bathroom Sector. Estimated sales in Croatia, Slovenia, Bulgaria and Romania and market shares of a sample among the leading companies, 2021	229
7.6 Sales outside Europe	230
Sales in Russia and other CIS Countries	230
Sales in the Americas	230
Sales in Asia and Pacific	230
Sales in Turkey, Middle East, Africa	230

APPENDIX: DIRECTORY OF EUROPEAN BATHROOM FURNITURE AND FURNISHINGS COMPANIES **231**



BATHROOM FURNITURE

July 2022
S12 – R3594

THE EUROPEAN MARKET FOR BATHROOM FURNITURE, FURNISHINGS AND WELLNESS

© Copyright CSIL



All rights reserved. Neither this publication nor any part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission by CSIL. Any such action is an infringement of Italian Law (Law 18 August 2000 no. 248) and may give rise to legal action for damages and may be prosecuted as a criminal offence.

All information in this report is verified to the best of the author's and the publisher's ability. However, CSIL does not accept responsibility for any errors and/ or omissions resulting from any source and for any loss arising from reliance on it.