

Sanitaryware Market in India 2013

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Abstracts

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Netscribes' latest market research report titled Sanitaryware Market in India 2013 states that sanitaryware manufacturers are experiencing high demand for their products due to multiple factors. These include an increase in average household income levels among Indian consumers, along with shift in lifestyle patterns, both of which has led to booming demand for high-end premium products over the past few years. More and more people are viewing sanitaryware products as a medium through which they can showcase their wealth and premium lifestyle. Besides, companies are also manufacturing products to suit the upbeat lifestyles of new age Indians by laying greater emphasis on looks and comfort. The rapid growth of the real estate sector also has an important role to play in the growth of the domestic sanitaryware market. With new residential and commercial establishments coming up at a very fast pace, demand for sanitaryware has also increased. Moreover, builders have also started to understand the importance of having bathrooms with a premium look, as a result of which they are investing more in installing high-end products. The replacement demand in the country is very low at present. This however, offers a vital growth opportunity for the sanitaryware manufacturers. Moreover, entry-level products are also likely to experience high demand in future owing to the low level of penetration of sanitation facilities in India. Around one-third of the country's population does not have access to basic sanitation facilities at present. As awareness and affordability of such products increases, more people will be willing to spend on sanitaryware.

The market is characterized by a large unorganized sector. Nearly 250 companies operate in the unorganized sector that caters largely to the low-end segment and the export market. While the organized players generally manufacture premium products, the unorganized sector manufactures low-end products. Price sensitive consumers looking to purchase low-end products generally choose products from the unorganized

players due to the relatively lower prices vis-à-vis low-end products from the organized players' portfolio. Moreover, several foreign players operate in the market who mostly concentrate on the premium segment.

The various state governments and the central government are implementing various sanitation campaigns and schemes that will ultimately benefit the market players, especially those manufacturing entry-level products. Government target of having sanitation facilities installed in every household of the country and the steps taken by it in this direction will ensure a higher uptake of products. Moreover, the 675% increase in the proposed allocation for sanitation in the 12th Five Year Plan compared to the fund allocation during the 11th Five Year Plan will provide a major boost to the market. Public toilet schemes such as installing 'Sulabh' toilets in public places as well as the various housing policies undertaken by the government over the years to reduce housing shortages will prove beneficial for the players.

With the steady growth in the market, several foreign companies have entered the domestic sanitaryware industry recently. These companies are trying to gain an entry by focusing on retail sales or by entering into joint ventures with established domestic players. Growing preference for premium products has also ensured that some of these new entrants have registered a growth rate of as much as ~30% on a y-o-y basis.

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