

## **Saudi Arabia Sanitaryware - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Saudi Arabia Sanitaryware Market Analysis

Saudi Arabian sanitaryware market size in 2026 is estimated at USD 409.31 million, growing from 2025 value of USD 387.41 million with 2031 projections showing USD 538.78 million, growing at 5.65% CAGR over 2026-2031. Robust residential construction under Vision 2030, combined with USD 1.5 trillion in mega-projects such as NEOM and the Red Sea development, is elevating demand for premium, water-efficient bathroom fixtures. Heightened homeownership targets, aggressive wastewater-reuse mandates, and rising hospitality investments are steering procurement toward smart, durable, and compliant solutions. Developers are favoring suppliers that can deliver large, standardized consignments while ensuring quick on-site installation through modular bathroom pods, thereby compressing project timelines. Together, these forces are strengthening price premiums for certified low-flow products and integrated smart toilets while broadening opportunities for innovators offering end-to-end bathroom packages.

Saudi Arabia Sanitaryware Market Trends and Insights

Housing Construction Boom Under Vision 2030

Vision 2030 has triggered an unprecedented pipeline of 400,000 residential units under the Public Investment Fund's ROSHN brand, together with mixed-use precincts that require uniform yet high-quality sanitaryware. The scale allows bulk purchasing, pushing the Saudi Arabia sanitaryware market toward suppliers with reliable, factory-certified output. Uniform water-efficiency

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targets mean toilets, basins, and showers must meet strict flow-rate thresholds, a shift that favors brands offering pre-certified ranges compliant with the Saudi Building Code. NEOM's linear city adds logistical complexity by necessitating remotely serviceable, modular bathroom solutions. As homeownership rises toward 70% by 2030, standardized fixtures that balance cost and durability become a baseline expectation, reinforcing steady volume growth.

#### Expansion of Hospitality Infrastructure

More than 362,000 hotel rooms are on the books for delivery by 2030, pivoting coastal and heritage destinations into premium sanitaryware hubs. Global operators specify smart toilets, sensor faucets, and corrosion-resistant finishes that enhance guest experience while satisfying Mostadam sustainability criteria. Luxury resorts along the Red Sea insist on IoT-integrated systems to monitor water consumption and maintenance cycles in real time. The emphasis on international-grade bathrooms elevates average selling prices, lifting revenue faster than unit volumes within the Saudi Arabia sanitaryware market. Suppliers that bundle installation training and after-sales support gain a competitive edge as hotel developers mitigate the local skills gap.

#### Raw-Material Price Volatility

While Saudi Arabia enjoys domestic clay and feldspar deposits, specialized glazes and fittings remain import-dependent, exposing producers to fluctuating freight and commodity costs. A 9.9% year-over-year rise in energy tariffs has compounded kiln-firing expenses, squeezing margins even for vertically integrated plants. Suppliers hesitate to pass full increases to developers bound by fixed-price contracts, heightening competitive pressure within the Saudi Arabia sanitaryware market. Consequently, manufacturers are re-engineering product designs to reduce material intensity and exploring long-term supply contracts to lock in pricing. Inventory optimization and near-sourcing of sub-components are also gaining traction to buffer volatility.

Other drivers and restraints analyzed in the detailed report include:

Water-Saving Regulations & Green Codes  
Modular Bathroom Pod Adoption  
High Manufacturing Energy Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Toilets and cisterns generated 37.10% of the 2025 value, securing the largest slice of the Saudi Arabia sanitaryware market, as every new dwelling requires at least two units. Luxury towers in Riyadh upgrade to rimless dual-flush designs that satisfy water-saving codes while adding aesthetic appeal. The wash-basin segment is advancing at 6.65% CAGR, buoyed by statement countertop designs in Red Sea resorts and smart faucets in grade A offices. Bathtubs and whirlpool spas represent a niche, but lucrative category confined to five-star suites and high-end villas where developers can justify premium pricing. Urinals, though lower in value, enjoy steady institutional demand as airport and mall refurbishments mandate sensor-based flush valves for hygiene. Bidets and integrated bidet toilets gain traction among health-conscious urban homeowners, aided by multi-function washlets that simplify installation. Suppliers bundle matching ceramic accessories, soap dishes, towel bars, and robe hooks-to promote full-bathroom packages. This portfolio breadth locks in repeat orders and reinforces brand presence across the Saudi Arabia sanitaryware market.

Value growth within basins outpaces volume because hospitality designers increasingly specify solid-surface or glass vessels that double as focal art pieces. Smart basins with touch-free temperature control support infection-control protocols in hospitals and airport lounges, widening commercial uptake. Technology add-ons such as anti-bacterial glazing and LED level indicators lift average selling prices. Market leaders offer easy-clean nano-coatings to reduce hard-water staining, a key issue in high-salinity Western coastal cities. Toilet makers focus R&D on pressure-assist mechanisms that flush efficiently with 3 liters of water, aligning

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with Mostadam credits. By consolidating procurement across toilets, basins, and accessories, large contractors negotiate volume discounts that stabilize supply schedules. These dynamics keep toilets as the backbone segment while basins capture disproportionate innovation budgets within the Saudi Arabia sanitaryware market.

Ceramics held a 67.85% share in 2025, thanks to abundant domestic mineral inputs and entrenched firing expertise. Familiarity among installers and end-users' anchors ceramics as the default choice across budget and mid-range housing. The Saudi Arabia sanitaryware market is gradually adopting solid-surface and composite materials that post a 6.50% CAGR, fueled by hospitality projects seeking seamless finishes and custom colors. Acrylic tubs remain price leaders for entry-level villas, yet durability improvements have broadened acceptance into three-star hotels. Pressed stainless steel wash troughs meet vandal-resistance requirements in stadiums and schools, albeit on a smaller scale.

Composite manufacturers promote lower porosity and lighter weight, which reduces shipping costs to remote Red Sea islands. Marble-effect engineered stone basins allow luxury aesthetics without the maintenance burden of natural marble, attracting boutique hotel developers. Ceramics still dominate heavy-traffic public restrooms because glazed surfaces resist abrasion and harsh cleaners. Energy-efficient kilns lower ceramic production costs, counterbalancing composites' material savings over time. Rising landfill fees motivate builders to favor recycled composite content, a selling point for most LEED-aligned projects. As material choices align with distinct performance envelopes, suppliers carry multi-material catalogs to serve every price and usage tier in the Saudi Arabia sanitaryware market.

The Saudi Arabia Sanitaryware Market Report is Segmented by Product Type (Toilets & Cisterns, Wash Basins and Sinks, and More), Material (Ceramic, Pressed Metal, and More), End-User (Residential, Commercial, Institutional), Distribution Channel (B2C/Retail, B2B/Project), and Geography (Central Region, Western Region, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Saudi Ceramics Company RAK Ceramics Kohler Co. Geberit AG Grohe (Lixil) Ideal Standard Toto Ltd. Roca Sanitario Duravit AG Villeroy & Boch American Standard (Lixil) Jaquar Group Lecico Egypt Hafele Al-Jomaih Sanitaryware Petra Ceramics Al-Khalij Ceramics Globe Union (Gerber) Turkuaz Seramik Rosa Sanitaryware

Additional Benefits:

- <ul> The market estimate (ME) sheet in Excel format
- 3 months of analyst support </ul>

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