

Toilet Market

TABLE OF CONTENTS

SECTION 1	U.S. TOILET MARKET SALES	1
	Executive Summary	1
	U.S. Toilet Market Trends	2
	Product Sales Mix	2
	Source Of Supply	3
	End-Use Markets And Factors Driving Demand	3
	Competitive Environment And Plant Profit Margins	4
	Outlook	5
Table 1-1	U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Supply And Share Of Total Plumbing Fixture Supply, 1992-2012 (dollars and percent)	7
Table 1-2	Value Of U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Supply, 1992-2012 (dollars): Shipments And Imports	8
Table 1-3	Quantity U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Supply, 1992-2012 (number): Shipments And Imports	9
Table 1-4	U.S. Supply Of One-Piece And Two-Piece Toilets, 1992-2012 (number)	10
Table 1-5	Average Value Per U.S. Toilet Supplied, 1992-2012 (dollars)	11
Table 1-6	U.S. Monthly Producer Price Index For Vitreous Plumbing Fixtures, 2004-2007 (index)	12
	SCOPE AND METHODOLOGY	13
SECTION 2	U.S. TOILET SHIPMENTS AND IMPORTS	15
	Summary Of Major Findings	15
	U.S. Shipments And Imports	15
	Water Closet Bowl Source Of Supply	16
	Flush Tank Source Of Supply	17
	Bidet And Urinal Supply	18
	Foreign Sources Of Supply	18
	High Efficiency Toilets	19

Toilet Market

Table 2-1	Value Of U.S. Vitreous China Water Closet Bowl, Flush Tank, Urinal, And Bidet Shipments, 1987-2012 (dollars).....	20
Table 2-2	Quantity U.S. Vitreous China Water Closet Bowl, Flush Tank, Urinal, And Bidet Shipments, 1987-2012 (units).....	21
Table 2-3	Average U.S. Value Per Unit Shipped Of Vitreous China Water Closet Bowls, Flush Tanks, Urinals, And Bidets, 1987-2012 (dollars)	22
Table 2-4	Value Of U.S. Flushmeter Valve And Flush Valve Shipments, 1992-2007 (dollars)	23
Table 2-5	Total U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Imports, 1998-2012 (dollars and units)	24
Table 2-6	Product, Freight And Insurance Costs, And Tariff Charges For Vitreous China Toilet And Related Product Imports And For The Top Five Countries Of Origin, 1997-2007 (dollars).....	25
Table 2-7	Value Of U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Imports For The Top Twelve Countries Of Origin, 2002-2007 (dollars).....	26
Table 2-8	Quantity U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Imports And Average Value For The Top Twelve Countries Of Origin, 2002-2007 (units and dollars)	27
Table 2-9	U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Imports By Product Type, 2002-2007 (number and dollars): Flushmeter, One-Piece, And Other Water Closet Bowls; Flush Tanks; And Urinals And Bidets.....	28
SECTION 3	TOILET END-USE MARKETS AND DISTRIBUTION.....	29
	Summary Of Major Findings.....	29
	U.S. Toilet Demand	29
	Residential Replacement And Remodeling Market	30
	New Residential Construction Market.....	31
	Nonresidential Market.....	31
	Retail Distribution Channels	32
	Export Shipments	32
Table 3-1	Number Of Toilets Installed In The United States By End-Use Market, 1992-2012 (number): New Housing Units, Residential Replacement And Remodeling, And Nonresidential Buildings	34
Table 3-2	Number Of Toilets Installed In New U.S. Housing Units By Type Of Structure, 1992-2007 (number): Single-Family Homes, Multi-Family Units, And Mobile Homes.....	35

Toilet Market

Table 3-3	Toilets Installed In New U.S. Housing Units And By Type Of Unit And Region, 1992-2005 (number): Single-Family Homes, Multi-Family Buildings, And Mobile Homes	36
Table 3-4	New U.S. Privately Owned Single-Family Homes By Number Of Bathrooms And By Region, 1992-2005 (number and percent): 1 1/2 Bathrooms Or Less, 2 Bathrooms, 2 1/2 Bathrooms, And 3 Bathrooms Or More	38
Table 3-5	New U.S. Housing Units In Multi-Family Buildings By Number Of Bathrooms And By Region, 1992-2005 (number and percent): 1 Bathroom, 1 1/2 Bathrooms, And 2 Bathrooms Or More	40
Table 3-6	U.S. Retail Plumbing Fixtures And Supplies Sales By Type Of Outlet And Number Of Stores Carrying Line, 2002 And 2007 (dollars and number): Kitchen-Bath Showrooms And Plumbing Supply Stores, Home Centers, Hardware Stores, And Other Building Material Dealers.....	42
Table 3-7	Lowe's Sales Of Fashion Plumbing Products, 1998-2007 (dollars)	43
Table 3-8	Total U.S. Vitreous China Water Closet Bowl, Flush Tank, Urinal, And Bidet Exports, 1987-2012 (dollars and units).....	44
Table 3-9	U.S. Vitreous China Water Closet Bowl And Flush Tank, And Urinal And Bidet Exports By Product Type, 2002-2007 (number and dollars): Flushmeter And One-Piece Water Closet Bowls, Other Water Closet Bowls And Flush Tanks, And Urinals And Bidets	45
Table 3-10	U.S. Vitreous China Water Closet Bowl, Flush Tank, And Urinal And Bidet Exports For The Top Seven Countries Of Destination, 2002-2007 (dollars and units).....	46
Table 3-11	High-Efficiency Toilets, 2007	47
SECTION 4	FACTORS AFFECTING U.S. DEMAND	49
	Summary Of Major Findings.....	49
	New Residential Construction Markets.....	49
	Residential Remodeling And Replacement Market	50
	Nonresidential Markets.....	51
Table 4-1	U.S. Spending On Building Construction, 1977-2007 (dollars): Total Buildings, Residential Buildings, And Nonresidential Buildings.....	52
Table 4-2	U.S. Spending On Nonresidential Construction By Building Type, 2003-2007 (dollars)	53

Toilet Market

Table 4-3	Total U.S. Housing Demand By Sector By Region, 2002-2007 (number): Existing Home Resales, New Housing Completions, And Mobile Home Placements	54
Table 4-4	New U.S. Privately Owned Housing Units Started And By Type Of Structure, 1980-2007 (number): Total Starts; In Structures With 1 Unit, 2 To 4 Units, And 5 Units Or More	55
Table 4-5	Monthly New Private U.S. Housing Units Authorized By 20,000 Building Permit Places By Region, 2006 And 2007 (number)	56
Table 4-6	New U.S. Single-Family Houses Sold By Sales Price, 1985-2006 (number): Under \$150,000, \$150,000 To \$199,999, \$200,000 To \$299,999, \$300,000 To \$499,999, And \$500,000 And Over	57
Table 4-7	U.S. Homes Closed By Ten Leading Domestic Home Builders, 2001-2006 (number).....	58
Table 4-8	U.S. Kitchen And Bathroom Remodeling Spending By Ownership Of Residential Property, 1993-2006 (dollars): Kitchen Remodeling, Bathroom Remodeling, And Kitchen And Bathroom Remodeling; Homeowners And Rental Properties.....	59
Table 4-9	Average U.S. Homeowner Spending On Plumbing Equipment And Repair Services By Demographic Characteristic, 2005 (dollars): Income, Age, Household Size, And Region.....	60
Table 4-10	Distribution Of U.S. Housing Units By Number Of Bathrooms, Total Number Of Residential Bathrooms, And Average Bathrooms Per Unit, 1995-2007 (number).....	
Table 4-11	U.S. Housing Units By Year Built By Region, Before 1960 And 1960-2006 (number).....	62
Table 4-12	U.S. Home Mortgage Interest Rates And Personal Income, 1982-2007 (percent and dollars)	63
Table 4-13	Distribution Of U.S. Households By Demographic Characteristic, 1985-2005 (percent): Household Income, Age Of Household Head, Household Size, Region, And Total Households	64
Table 4-14	Number Of U.S. Hotels And Motels, Number Of Guest Rooms, And Lodging Industry Construction Spending, 1982-2006 (number and dollars)	65
Table 4-15	U.S. Recreation Vehicle Shipments, 1987-2007 (number).....	66
SECTION 5	MARKET COST STRUCTURE AND THE COMPETITIVE ENVIRONMENT	67
	Summary Of Major Findings.....	67
	Competitive Environment And Market Shares.....	67
	Leading Competitors	68

Toilet Market

Increased Reliance On World Markets	69
Industry Cost Structure And Profit Margins	71
Table 5-1 Operating Ratios And Profit Margins For U.S. Vitreous China Plumbing Fixture Plants, 1987-2007 (percent): Payroll, Other Labor Costs, Material Costs, And Gross Profit Margins	73
Table 5-2 U.S. Vitreous China Plumbing Fixture Plant Labor Situation, 1987-2007 (number, dollars, and percent): Employees, Shipments Per Employee, And Production Worker Average Hourly Wages And Weekly Hours	74
Table 5-3 U.S. Producer Price Trends For Clay, Ceramic, And Refractory Minerals, 1987-2007 (index).....	75
Table 5-4 U.S. Toilet Sales For The Top Eight Manufacturers And Share Of The U.S. Supply, 2006 (dollars and percent).....	76
Table 5-5 American Standard Bath And Kitchen Product Sales By Market Application And World Area, 2004-2006 (dollars): Residential And Commercial; New Construction And Replacement; Europe And Middle East, Americas, And Asia/Pacific.....	77
Table 5-6 Toto Sales And Operating Income By World Area, 2005 And 2006 (dollars): Japan, United States, China, And Other.....	78
SECTION 6 COMPANY PROFILES	79
American Standard Companies, Inc.	80
Toilet Sales And Markets.....	80
Manufacturing And Distribution.....	80
Toilet Product Lines.....	81
Briggs Industries	82
Toilet Products And Manufacturing.....	82
Toilet Sales And U.S. Market Share	83
Crane Plumbing, LLC.....	84
Toilet Products.....	84
Sales And Market Share.....	84
Eljer, Inc.	85
Toilet Products.....	85
Sales And Market Share.....	85
Gerber Plumbing Fixtures Corp.	86
Toilet Products And Manufacturing.....	86

Toilet Market

Sales And Market Share.....	86
Kohler Co.	87
Worldwide Plumbing Product Lines and Production Facilities	87
Toilet Products.....	88
Sales And Market Share.....	89
Mansfield Plumbing Products, LLC.	90
Toilet Products And Markets.....	90
Sales And Market Share.....	91
Toto Ltd.	92
Toto Products And World Network	92
Toto USA and Market Share.....	92

Catalina Market Profile CP049

Publication Date: May 2007