



**Ceramic Tile And Stone Consultants, Inc.**

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*Ceramic Tile and Stone Consultants (CTaSC) and Catalina Research Present...*

## **CERAMIC TILE CR044: Released April 2007**

CTaSC and Catalina Research announces the release of our 230-page Catalina Report on Ceramic Tile. This fact-filled report provides the action-oriented executive with up-to-date information on North American and World markets, and ceramic tile's position in the U.S. floor coverings and hard surface flooring industry. Each page will assist the ceramic tile executive exploit growing product lines, review new technologies and new products, strengthen distribution, penetrate end-use markets, maximize plant profit margins, and plan for 2007 and beyond.

Catalina Reports contain the timely data that allows users to evaluate market size, growth potential, end-use markets, profitability, market share, and the competitive environment. So turn to a Catalina Report when developing strategies to take advantage of the growth in residential and nonresidential sales, shifting distribution channels, and new ceramic tile products.

The content matter shows the significant data and information included in this report. This vast wealth of information is summarized to clearly point to the pertinent industry trends. Look it over, fill out the order form, and receive your Catalina Report promptly. You will find it a valuable planning tool.

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### **CONTENT MATTER**

#### **1. U.S. CERAMIC TILE INDUSTRY TRENDS (1987-2012)**

- U.S. market sales
- Quarterly production, shipments, imports, and exports
- Ceramic tile's share of U.S. floor coverings market sales
- Ceramic tile price comparison with other floor covering materials
- Ceramic tile growth trends and comparison with factors driving demand
- Ceramic tile supplied by major country of origin
- Analysis of U.S. ceramic tile plant profit margins and the U.S. manufacturing average

#### **2. U.S. CERAMIC TILE SHIPMENTS (1977-2007)**

- Square foot and dollar shipments
- Share of U.S. floor covering shipments
- Shipments by tile size, glazed and unglazed
- U.S. manufacturer price trends and by type of product

#### **3. U.S. IMPORTS AND WORLD MARKETS (1987- 2007)**

- Total import costs: product, insurance, freight, and tariff charges
- Import's share of U.S. market sales
- Import price trends
- Imports by tile size, glazed and unglazed
- Imports for the 15 top countries of origin
- Total world output and for top 20 countries
- Per capita consumption for 20 leading markets
- Sales for 53 leading foreign-based manufacturers
- Share of world production for 20 leading producers
- Sales/operating ratios for Internacional de Ceramica, Villeroy & Boch, and 5 Italian producers

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### 4. END-USE MARKETS AND FACTORS AFFECTING DEMAND (1982-2007)

- Residential and nonresidential purchases
- New construction and remodeling markets
- Housing starts, permits, and factory-built housing
- Regional and state housing markets: new and existing homes
- Construction spending by building type
- Major U.S. home builders
- Price and size of new homes
- New and replacement kitchens and bathrooms
- Bathrooms per new and existing housing units
- Kitchen and bathroom remodeling spending
- Homeowner remodeler demographics
- Interest rates and personal income
- Age of U.S. housing stock

### 5. U.S. CERAMIC TILE DISTRIBUTION AND CONSUMER DEMOGRAPHICS (1987-2007)

- Retail hard surface flooring sales by type of retailer
- Ceramic tile's share of hard surface flooring sales and per capita sales
- Number, revenues, material costs, and work by type of building for ceramic tile contractors
- Contractor employment & wage trends
- Contractor revenues for new construction, remodeling, and repair work
- Revenues per square foot of ceramic tile installed
- Contractor revenues by region and state
- Number of contractors by regional and state and average revenues per contractor
- Household spending on hard surface flooring and installation by homeowners and renters
- Household spending on hard surface flooring and installation by demographic characteristic
- Demographics of U.S. households

### 6. U.S. CERAMIC TILE EXPORTS AND CANADIAN IMPORTS (1977-2007)

- Square foot and dollar exports
- Export price trends
- Export's share of U.S. shipments
- Exports of glazed and unglazed tiles
- Exports by major country of destination
- Foreign sales for 15 top exporting countries
- Canadian square foot and dollar imports
- Canadian import price trends
- Canadian imports of glazed and unglazed tiles by major country of origin
- Canadian building permits and housing starts

### 7. U.S. CERAMIC TILE PLANT PROFITABILITY AND THE COMPETITIVE ENVIRONMENT (1977-2007)

- Number and revenues of U.S. plants
- Number of domestic manufacturers
- Payroll and material costs
- Plant profit margins
- Material input price trends
- Plant labor situation
- Inventory trends
- Capital expenditures
- Number of plants by state
- Number of plants, shipments, and operating ratios by employee-size
- Market shares for 11 leading U.S. manufacturers & marketers
- Sales, operating ratios, and plants for Dal-Tile and IWT Tesoro

### 8. COMPANY PROFILES

- Catalina Research has profiled 38 leading U.S.- and foreign-based ceramic tile manufacturers and marketers. Some of the top companies include:
  - American Marazzi
  - Crossville Ceramics
  - Dal-Tile
  - Florida Tile
  - Gruppo Ceramiche Ricchetti
  - Internacional de Ceramica
  - Iris Group
  - Kalerseramik

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- Florim USA
- Granitifiandre
- Laufen USA
- Porcelanosa USA

**About Catalina Research and CTaSC:**

**Catalina Research offers a wealth of knowledge and experience to assist action-oriented executives in uncovering industry intelligence. They provide the most comprehensive, up-to-date, and insightful data on construction materials and building equipment markets. Catalina Reports include pertinent information from government agencies, proprietary research sources, and competitor intelligence. Thanks to its strong ties with leading business associations and trade publications, Catalina is able to deliver the most insightful industry intelligence.**

**Ceramic Tile and Stone Consultants (CTaSC) has over 25 years of hands-on experience and specializes in providing marketing and business services for the ceramic tile and stone industries. CTaSC also provides Forensic Failure Investigations, Expert Witness, Quality Control and Remediation Services.**

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