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IMPORT ANALYSIS

Market Research Support

PLASTIC TOILETS

JANUARY TO DECEMBER 1987

Pub. No.: 88006-RR May 1988



Government
of Canada

Regional Industrial
Expansion

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EXPLANATORY NOTES

Method

The data shown in this analysis is extracted from Revenue Canada Customs documents. These documents provide a description of the products, names of importers, exporters, quantities, dollar values, unit prices, countries of origin, provinces of entry, tariff applications and rates of exchange.

The information presented in this report is more detailed than that generally available from Statistics Canada or other publications. Data which might reveal information about individual importers is aggregated.

Valuation

Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

Rounding

Figures may not add due to rounding.

REFERENCE SOURCES

Department of Regional Industrial Expansion
Statistics Canada
Revenue Canada

FOR MORE INFORMATION PLEASE CONTACT:

Market Information and Analysis Division OR
Market Development Branch
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel: (613) 954-4970

Secondary & Service Industries
Equipment Division
Surface Transportation and
Machinery Branch
Department of Regional Industrial
Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel: (613) 954-3250

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IMPORT ANALYSIS

PLASTIC TOILETS

I. INTRODUCTION AND SCOPE

This Import Analysis is one of a series prepared in order to assist businesses and other organizations in their market research of specific products. The detailed import information provided in these reports supports studies by organizations seeking to expand existing production lines, change individual product characteristics or engage in new manufacturing investment in Canada. The coverage of an import analysis is developed in close consultation with the client, and is tailored to meet those specific requirements. It is important to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

This analysis of imports of plastic toilets, of special design, is based on a detailed examination of Revenue Canada Customs import documents during the period January to December 1987. The following Canadian International Trade Classification (C.I.T.C.) import commodity code was analysed:

671-99-25 Toilets, recirculating or self-contained

In addition, this analysis also includes a small volume of imports of plastic toilets found in C.I.T.C. code 671-68-40: Toilet Bowl - Tank Combinations and in 671-99-23: Toilets, Chemical.

For the purposes of this analysis, import documents were processed which referred to products identified as:

- plastic portable toilets with a self-contained flush toilet system;
- hand-lever or foot-pedal operated mechanical trap-toilets for recreational vehicles (including a small number made of vitreous china);
- portable or hand toilets, not further identified.

Toilets for normal household use, chemical toilets and baby toilets are not included.

II. IMPORT TRENDS

As shown below, total imports of recirculating or self-contained toilets classified to C.I.T.C. code 671-99-25 were valued at \$1.7 million for the period January to December 1987 and witnessed a growth rate of 39.5 per cent over 1986.

Imports of Toilets, Recirculating or Self-Contained

<u>1984</u>		<u>1985</u>		<u>1986</u>		<u>1987</u>		<u>% Value</u>
<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>	<u>Change 1986-</u>
<u>(No.)</u>	<u>(\$000)</u>	<u>(No.)</u>	<u>(\$000)</u>	<u>(No.)</u>	<u>(\$000)</u>	<u>(No.)</u>	<u>(\$000)</u>	<u>1987</u>
27 031	1 620	17 514	995	25 945	1 241	36 016	1 731	+39.5

These figures are published by Statistics Canada and also contain some chemical toilets. The remainder of this analysis deals only with plastic toilets as described in section I above.

III. ANALYSIS OF IMPORTS

During 1987 imports of plastic toilets, as analysed in this report, amounted to 37 021 units valued at \$1.6 million.

Most imports of plastic toilets originated in the United States. The Netherlands and the United Kingdom were the remaining countries of export. In order to maintain confidentiality of Canadian importers, a breakdown of shipments by country cannot be shown.

Almost a third of the imports had only the overall description: Portable and recreational vehicles. These unit prices were between \$36 and \$65. Those explicitly reported as being for recreational vehicles were 42 per cent of the total value, and included some high-priced ones (up to \$175). Vitreous china units were, on average, much more expensive. Those specifically identified as portable made up 26 per cent of the total. Their unit prices were \$20 to \$60.

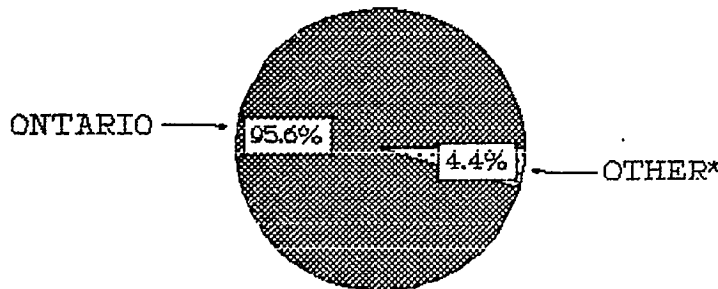
IMPORTS OF PLASTIC TOILETS BY TYPE & PRICE RANGE
JANUARY TO DECEMBER 1987

<u>Type</u>	<u>Price Unit Range (\$)</u>	<u>Quantity (No.)</u>	<u>Value (\$000)</u>	<u>Average Price Per Unit (\$)</u>	<u>% of Total Value</u>
Portable	20 to 60	11 289	423	37	26
Recreational Vehicle:					
Plastic	36 to 160	12 596	594	47	37
Vitreous China	48 to 175	1 126	89	79	5
* Portable & Recreational Vehicle	36 to 65	11 936	503	42	31
Type Not Known	160 to 375	74	15	201	1
TOTAL		37 021	1 623		100

* Described on import documents as such, with no further breakdown.

Ontario was the major province through which the imports of plastic toilets were cleared accounting for 36 217 units (98 per cent) for a value of \$1 553 000 (96 per cent). Appendix A contains more details.

PROVINCE OF CONSIGNEE



100% = \$1.6 MILLION

*OTHER CONSISTS OF ALBERTA, BRITISH COLUMBIA, QUEBEC,
NOVA SCOTIA AND MANITOBA

There were at least 23 known consignees/importers of plastic toilets during the calendar year 1987. The principal three consignees/importers accounted for \$1.5 million or 94 per cent of the dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix B.

IMPORT MARKET CONCENTRATION, 1987

<u>Principal Consignees/Importers (By Value)</u>	<u>Cumulative Quantity (No.)</u>	<u>Cumulative % of Total Quantity</u>	<u>Cumulative Value (\$000)</u>	<u>Cumulative % of Total Value</u>
3	35 951	97	1 528	94
6	36 471	98	1 570	97
10	36 815	99	1 598	98
All Consignees/ Importers (23)	37 021	100	1 623	100

IV. CANADIAN PRODUCTION

According to industry sources, plastic toilets as described in this report are made in Canada. However, for reasons of confidentiality, data on production or shipments by Canadian manufacturers are not available.

V. MARKET SUMMARY

The general term "plastic toilets" relates to two distinct market groups. The first market is the lightweight portable toilet that campers generally keep inside their tents or camping trailers for night use and then empty. These portable toilets are sold through hardware stores and sporting goods stores.

The second market is for fixed or stationary plastic toilets. These are installed as permanent fixtures inside mobile units such as camping trailers, mobile homes, and recreational vehicles. They are bolted to the floor and connected to the water circulating system of the trailer or vehicle. A limited number of these stationary plastic toilets are also installed in cottages.

The channels of distribution for plastic toilets are well defined. For the portable units that are sold to campers through retail stores, the manufacturer would locate the appropriate buyers in the major Canadian hardware wholesale and retail chains. For the stationary plastic toilets, the manufacturer would have to identify the various Canadian manufacturers and/or assemblers of camping trailers, recreational trailers, recreational vehicles, trailer homes and mobile homes.

At the supply level, three Canadian companies manufacture plastic toilets, supplying over one half of the Canadian market for the portable plastic toilets and about one third of the market for the stationary plastic toilets. There are minimal exports of Canadian-made plastic toilets. Hence, opportunities exist for significant import replacement in these well defined markets as well as for export to the United States.

The continuing high level of imports, the popularity of camping, and the increasing time spent on recreational activities, indicate that there is significant potential for the production of plastic toilets in Canada. A new manufacturer could design its own line or enter into a joint venture/manufacture-under-license agreement with a foreign manufacturer from the United States or from Europe.

APPENDIX A

IMPORTS OF PLASTIC TOILETS
BY PROVINCE OF CONSIGNEE
JANUARY TO DECEMBER 1987

<u>Province</u>	<u>Quantity</u> <u>(No.)</u>	<u>Value</u> <u>(\$000)</u>	<u>Average</u> <u>Price Per Unit</u> <u>(\$)</u>	<u>% of Total</u>	
				<u>Quantity</u>	<u>Value</u>
Ontario	36 217	1 553	43	98	96
Alberta & Manitoba	367	34	93	1	2
British Columbia	308	23	74	1	1
Québec & Nova Scotia	<u>129</u>	<u>14</u>	108	<u>*</u>	<u>1</u>
TOTAL	37 021	1 623		100	100

* Less than one per cent

CANADIAN IMPORTERS

Importers of plastic toilets during the period January to December 1987, as indicated in this report, are listed below in alphabetical order. Where the importer is not the same as the consignee, (i.e. the recipient of the goods shipped), the name of the consignee rather than that of the importer is listed. The importer or consignee is not necessarily the end-user of the product.

NOTE: This list includes all importers except individuals.

<u>Name</u>	<u>Address</u>
Atlas Trailer Coach Products	Calgary, Alta.
B & B Trailer Supplies (Ont.) Ltd.	London, Ont.
Blue Seas Boat Co.	Clinton, Ont.
C.S. Yachts Ltd.	Brampton, Ont.
Canadian Leisure Travel Co. Ltd.	Calgary, Alta.
Canoe Cove Manufacturing Ltd.	Sidney, B.C.
Caravanes Caron Inc.	Neuville, Qué.
H & A Travelways Ltd.	Truro, N.S.
Hinterhoeller Yachts Ltd.	St. Catharines, Ont.
Home Hardware Stores Ltd.:	St. Jacobs, Ont.
	Wetaskiwin, Alta.
Home and Park Motorhomes, A Div. of Hanmar	
Home Equipment Limited	Kitchener, Ont.
Intermann Marine Marketing Ltd.	Vancouver, B.C.
Lake Navigation Kenora Ltd.	Kenora, Ont.
Lycro Products Ltd.	Burnaby, B.C.
Margro Custom Haulage Limited	Parry Sound, Ont.
Mitchell Distributors Ltd.	Winnipeg, Man.
Reynolds Associates Limited	St. Catharines, Ont.
Sea World Inc.	Baffin Island, N.W.T.
Thetford Sanitation Ltd.	Mississauga, Ont.
Thundercraft Industries Inc.	Lachute, Qué.
Wes Pac Trailer Supply Inc.	Burnaby, B.C.
Western Marine Co.	Vancouver, B.C.
Whitby Boat Works Ltd.	Whitby, Ont.

FOREIGN EXPORTERS TO CANADA

Exporters to Canada of plastic toilets during the year 1987, as shown in this report, are listed in descending order of dollar value.

<u>Name</u>	<u>Address</u>	<u>Value of Imports</u> <u>(\$000)</u>
Thetford Corporation	Dexter, MI United States)	
Thetford Production B.V.	Etten-Leur, The Netherlands)*	1 564
Sealand Technology Inc.	Big Prairie, OH United States)	
North and Judd Inc.	Middleton, CT United States)	
Monogram, A Nortek Company	Redondo Beach, CA United States)*	42
B.J. Equipment Inc.	Model City, NY United States)	
Valterra Products Inc.	San Fernando, CA United States)*	11
Raritan Engineering Co. Inc.	Millville, NJ United States)	
Blake & Sons, Marine Products)	
Division	Hants England)*	6
John A. Biewer Co. Inc.	Marysville, MI United States)	
Sea World Inc.	San Diego, CA United States)	
		<u>1 623</u>

* Aggregated in order to preserve confidentiality of Canadian importers.

CANADIAN SUPPLIERS

The following lists are taken from two sources: a) the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the federal Department of Regional Industrial Expansion (DRIE) and b) the Canadian Trade Index, published by the Canadian Manufacturers' Association (CMA). These lists may not include all suppliers of the products in question, as companies must themselves register in BOSS or the Canadian Trade Index. In both cases, information of Canadian products supplied is as given by the companies.

BOSS

Canadian companies are arranged in alphabetical order within the following Canadian International Trade Classification (C.I.T.C.) commodity code.

671-99-25 Toilets, recirculating or self-contained

<u>Name</u>	<u>Address</u>
Clearwater Marine Industries Ltd.	Toronto, Ont.
* Everest & Jennings Canadian Ltd.	Concord, Ont.
* ITT Fluid Products-Guelph, Div. of ITT Ind.	Guelph, Ont.
* ITT Industries of Canada Limited	Toronto, Ont.
James Fitzpatrick Industries Limited	Sault Ste. Marie, Ont.
* Sanitation Equipment Ltd.	Concord, Ont.

* Company engaged in export trade

Any enquiries and/or comments regarding the BOSS list should be directed to:

Business Opportunities Sourcing System (ABOS)
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario K1A 0H5
Tel: (613) 954-5031 - Telex: 053-4123

CANADIAN TRADE INDEX

Canadian companies are arranged in alphabetical order.

Toilets, (not necessarily plastic)

<u>Name</u>	<u>Address</u>
* American-Standard, Division of Wabco-Standard Inc.	Toronto, Ont.
Arista-Newman, Division of Waltec Inc.	Downsview, Ont.
Crane Canada Inc.	Montréal, Qué.
Fitzpatrick, James, Industries Limited	Sault Ste. Marie, Ont.
* Future Group of Companies Ltd.	Markham, Ont.
Josam Manufacturing Canada	Scarborough, Ont.
Sanitation Equipment Ltd.	Concord, Ont.
* Storburn	Grimsby, Ont.
Wessan Plumbing Manufacturing Ltd.	Mississauga, Ont.

* Indicates firms engaged in export trade

Any enquiries and/or comments regarding the Canadian Trade Index list should be directed to:

The Canadian Manufacturers' Association
One Yonge Street
Toronto, Ontario M5E 1J9
Tel: (416) 363-7261 - Telex: 065-24693

CANADIAN AND FOREIGN TARIFFS

Plastic toilets included in this analysis were dutiable under the following most commonly applied tariff item.

Tariff Item	Description	Tariff Treatment				
		British Prefer- ential Tariff %	Most Favoured Nation Tariff %	General General Tariff %	General Prefer- ential Tariff %	U.K. and Ireland %
28900-1	Baths, bathtubs, basins, closets, closet seats and covers, closet tanks, lavatories, urinals, sinks and laundry tubs of earthenware, stone, cement, clay or other material n.o.p. on and after January 1, 1987	11.4	11.4	35.0	Free	11.4

N.o.p. - Not otherwise provided for

Tariff Arrangements and Foreign Countries of Export:

Exporting countries which qualify for the Most Favoured Nation tariff treatment: United States, The Netherlands and United Kingdom.

Enquiries concerning tariffs should be directed to the nearest Customs and Excise office or to:

TARIFF PROGRAMS
REVENUE CANADA
CUSTOMS AND EXCISE
OTTAWA, ONTARIO
K1A 0L5
TEL: (613) 954-6946

Foreign Countries

Enquiries concerning tariffs and other government trade regulations in foreign countries should be directed to:

INFO EXPORT
EXTERNAL AFFAIRS
OTTAWA, ONTARIO
K1A 0G2
TEL: (613) 993-6435 OR 1-800-267-8376

