STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.

◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.

◆ To complement the organizations’ internal competitor information gathering efforts with strategic analysis, data interpretation and insight.

◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.

◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS (National Bureau of Statistics of China), China Customs and WIND Database etc.
Abstract

As China’s traditional competitive industry, ceramics ranks first worldwide in both annual output and export value. The mounting regulatory pressure on real estate market as well as the rising raw material and labor costs in China since 2011 have exerted great impact on the development of the ceramic industry, causing the fall in revenue growth rates of all market segments. In terms of export, the Chinese ceramic products encountered frequent anti-dumping sanctions in 2011, and the high tariffs further cut profit margins of ceramic enterprises.

In future, under the backdrop of continuous control policies on real estate in China, the building ceramic industry is expected to usher in the phase of adjustment, whereupon some small firms with poor brand awareness will be merged. Representative players in this field include Guangdong Newpearl Ceramics Group Co., Ltd., Hangzhou Nabel Group Co., Ltd., Guangdong OUYA Ceramics Co., Ltd, etc..

Sanitary Ceramics: Henan is the province with the largest sanitary ceramic production in China, accounting for 45% of the national total. The Chinese high-end sanitary ceramic market is primarily dominated by foreign brands such as TOTO and KOHLER; local key enterprises refer to Guangdong Summit Ceramics Co. Ltd, Shanghai China Ceramic Sanitary Ware Co., Ltd, Shunde Lehua Ceramic Sanitary Ware Co., Ltd., Guangdong Sitong Group Co., Ltd., etc..

Building Ceramics: In 2011, EU levied a 69.7% tariff on Chinese exported ceramic tiles, which made China’s export volume of building ceramics drop substantially, many small and medium-sized enterprises faced bankruptcy and some turned to the domestic market, thus further exacerbating competition there.

China Ceramic Industry Report, 2011-2012 analyzes the status quo, regional development, import and export, five market segments of Chinese ceramic industry, and 20 typical ceramic companies.

Building Ceramics: In 2011, EU levied a 69.7% tariff on Chinese exported ceramic tiles, which made China’s export volume of building ceramics drop substantially, many small and medium-sized enterprises faced bankruptcy and some turned to the domestic market, thus further exacerbating competition there.
**Household Ceramics:** There is a great variety of domestic ceramic products in China, with annual output in 2011 exceeding 30 billion pieces, sharing over 60% worldwide. As a significant household article, domestic ceramics will largely head for art. The Chinese household ceramic industry features lower concentration but fierce competition, represented by Guangxi Sanhuan Enterprise Group Holding Co., Ltd., Hunan Hualian China Industry Co., Ltd, Tangshan Ceramic Stock Co., Ltd., etc..

**Special Ceramics:** As the fast-growing ceramic market segment since 2007, the market scale of special ceramics presented an AAGR of 37% in 2007-2011. So far, large-scale special ceramic production base hasn’t taken shape in China; leading enterprises consist of Hunan Jingcheng Special Ceramic Co., Ltd., Shandong Luyang Share Co., Ltd., etc..

**Artistic Ceramics:** as the art market develops, artistic ceramics becomes an important category. In 2011, the Chinese artistic ceramic prices went up by about 30%. Compared with other ceramic market segments, artistic ceramics has smaller market scale, less number of brands but greater market potential. Big manufacturers in China are as follows: Tangshan Yali Ceramic Co., Ltd., The Great Wall Group Co., Ltd., Guangdong Sitong Group Co., Ltd., Franz Collection Inc., etc.
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