



China Ceramic Tile Industry Report, 2014-2018

May. 2014

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

With economic growth, increasing urbanization rate and people's disposable income, the requirement on housing quality and comfort is augmenting, China's ceramic tile market is also booming, with market scale increasing from RMB131 billion in 2007 to RMB380 billion in 2013, representing a CAGR of 19.4%. However, as the growth of investment in real estate slowed down, China's ceramic tile market also entered a period of adjustment. In 2013, the penetration of ceramic tile consumption for new house decoration in China reached 74.7%, but in 2008 this rate is estimated to drop to 68.5%, with market scale hitting RMB402.1 billion.

Chinese building ceramics enterprises are mainly concentrated in southeast coastal areas and Jiangxi province. With better equipment, strong technical force, excellent quality and high brand awareness, enterprises in these areas attach most importance to the production and sales of medium and high-end building ceramics. Among them, Guangdong and Fujian belong to the traditional production base of building ceramics, while Jiangxi is a significant emerging production base with the influx of a large number of good brands resulting from the transfer of ceramics industry from Guangdong and coastal cities.

TOP10 Production Areas of Ceramic Tile in China, 2013 (Sq m mln)

Ranking	Province	Output
1	Guangdong	1,905
2	Fujian	874
3	Jiangxi	867
4	Liaoning	766
5	Shandong	682
6	Henan	331
7	Hubei	287
8	Guangxi	278
9	Sichuan	208
10	Hebei	199

Source: ResearchInChina, WIND

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The Chinese ceramic tile market now features numerous brands, showing serious homogenization of products and low concentration of enterprises. High-end brands include Dongpeng, Marco Polo, Hongyu, Newpearl, New Zhongyuan, Oceano, Nabel, Bode, Eagle Ceramic, etc., of which the top ten tile manufacturers hold a combined market share of only 9.93% and the market competition is very intense. In the future, as the industrial transfer and government's strengthening protection of environment, the technically backward capacity will be gradually eliminated, accompanied by more corporate mergers and rising market concentration (especially in the high-end market segment).

China Ceramic Tile Industry Report, 2014-2018 contains the following studies:

- ✘ Overview of China ceramic tile industry, including development history, policies and regulations, market size, competition pattern, regional markets, import and export, trends, etc;
- ✘ Development of China ceramic tile related industry chain, involving market size and prospects of housing, decoration and other industries;
- ✘ Analysis of 12 companies namely Dongpeng, Marco Polo, Hongyu, Newpearl, New Zhongyuan, Oceano, Nabel, Bode, Eagle Ceramic, Monalisa, Cimic and China Ceramics, covering profile, operation, flagship products, distribution of production bases, technical characteristics and so on.

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