

**China Sanitary Ware Industry
Report, 2014-2018**

Apr. 2015

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

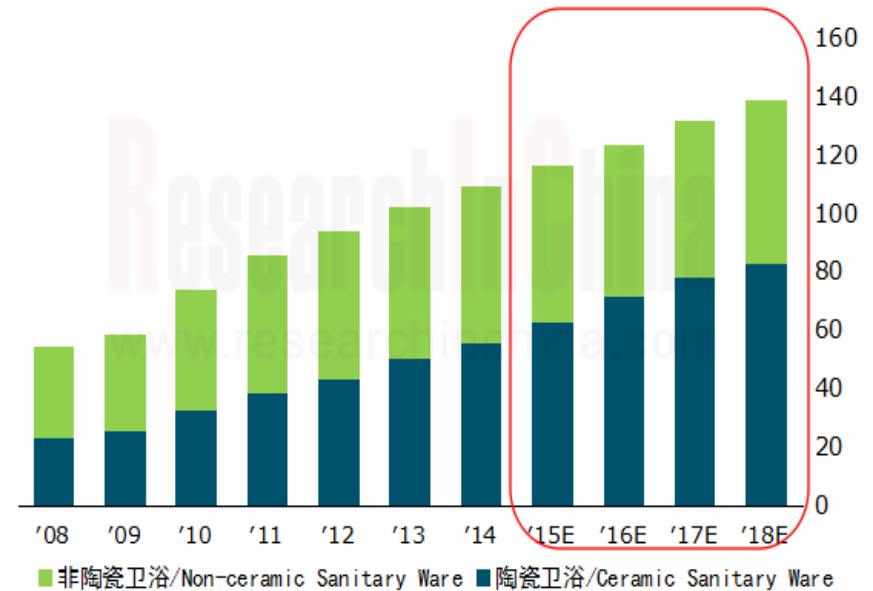
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

With the deepening of China's urbanization, continuous improvement of people's living standards and increasing requirements on housing comfort, the demand for sanitary ware has grown, leading to steady growth of sanitary ware market in China. In 2014, China's sanitary ware market size reached RMB109.5 billion, registering a CAGR of 12.4% from RMB54.2 billion in 2008.

The Chinese sanitary ware products can be divided into ceramic sanitary ware (e.g. toilet, bidet, wash basin, sink, mop sink, toilet roll holder and soap box) and non-ceramic sanitary ware (e.g. bathtub, bathroom cabinet, faucet, flusher, hand dryer and electronic parts). In 2014, the ceramic sanitary ware market size rose 15.8% year on year to RMB55.52 billion, making up about 50.7% of the total sanitary ware market size, firstly exceeding the non-ceramic sanitary ware market worth RMB54 billion.

China's Sanitary Ware Market Size, 2008-2018E



Source: China Sanitary Ware Industry Report, 2014-2018

China's sanitary ware industry features a high degree of marketization, fierce competition and low concentration. Sanitary ware companies there can be roughly grouped into the three. First, sole-proprietorship or joint-venture ones of world-renown companies which boast rich capital and R&D strength, such as TOTO, KOHLER, AmericanStandard and Roca; second, some joint ventures and stronger Chinese companies whose products are positioned at high and mid-end markets, represented by ARROW, FAENZA, MONARCH, HUIDA, HEGII, Bolina, etc.; third, small and medium-sized private ones with small scale and decentralized production, aimed at low-end market. On the one hand, foreign well-known companies have occupied the high-end sanitary ware market in China and seen product line gradually extending towards the local-counterpart-based mid-end market. On the other hand, local Chinese enterprises become more competitive through continuous research and development, independent innovation, brand management, and expanding their product structure from the low and mid-end market to the foreign-brand-dominated high-end market.

China Sanitary Ware Industry Report, 2014-2018 highlights the followings:

- Overview of sanitary ware industry in China, including definition and classification, historical development, policies and regulations, etc.;
- Analysis of sanitary ware market in China, consisting of market size, competition pattern, imports and exports, regional markets, etc.;
- Analysis of sanitary ware market segments in China, involving market size and competition pattern of ceramic and non-ceramic sanitary ware market, etc.
- 7 sanitary ware companies at home and abroad e.g. TOTO, KOHLER, LIXIL, Roca, HCG, ARROW, FAENZA, MONARCH, RYOWA, ANNWA, HEGII and Bolina, including their profile, financials, production and sales, customers, featured products, R&D, distribution of production bases, technical features, etc.

1. Overview of Sanitary Ware

- 1.1 Definition
- 1.2 Classification
- 1.3 Historical Development
- 1.4 Standards & Policies

2. China Sanitary Ware Related Industry

- 2.1 Housing
- 2.2 Home Decoration
- 2.3 Other Market Drivers
 - 2.3.1 Urbanization
 - 2.3.2 Per Capita Disposable Income

3. China Sanitary Ware Market

- 3.1 Market Size
- 3.2 Ceramic Sanitary Ware
- 3.3 Competition Pattern
- 3.4 Exports
- 3.5 Market Segments
 - 3.5.1 Market Size
 - 3.5.2 Competition Pattern
- 3.6 Forecast
 - 3.6.1 Overall Market
 - 3.6.2 Segment Market

4 Regional Markets

- 4.1 General Pattern

4.2 Production by Province or City

- 4.2.1 Guangdong
- 4.2.2 Fujian
- 4.2.3 Zhejiang
- 4.2.4 Other

5. Key Players in China

- 5.1 KOHLER
 - 5.1.1 Profile
 - 5.1.2 Main Products
 - 5.1.3 Core Technology
- 5.2 TOTO
 - 5.2.1 Profile
 - 5.2.2 Brief History of TOTO China
 - 5.2.3 Financial Data
 - 5.2.4 Revenue Structure
 - 5.2.5 Core Technology
 - 5.2.6 Production Base
 - 5.2.7 Technical Features and Main Products
 - 5.2.8 Mid-term Goal in China
- 5.3 ARROW
 - 5.3.1 Profile
 - 5.3.2 Technology and Product
 - 5.3.3 Production Layout
- 5.4 LIXIL (AmericanStandard, INAX)
 - 5.4.1 Profile
 - 5.4.2 Key Financial Data

5.4.3 Revenue Structure

5.4.4 Main Products

5.5 Bolina

5.5.1 Profile

5.5.2 Key Financial Data

5.5.3 Revenue Structure

5.5.4 Marketing Channel

5.5.5 Sales and Price

5.5.6 Capacity and Output

5.6 FAENZA

5.6.1 Profile

5.6.2 Technology and Product

5.6.3 Production Layout

5.7 ANNWA

5.8 HCG

5.9 HEGII

5.10 Dongpeng

5.11 YING

5.12 Seagull

5.14 Appollo

5.15 SUNLOT

5.16 MONARCH

5.17 Roca

5.17.1 Profile

5.17.2 Operation

5.17.3 Main Products

5.17.4 Roca in China

- Development History of China Sanitary Ware Industry
- China Buildings Under Construction, 2007-2014 (sqm mln)
- China Construction Starts, 2007-2014 (sqm mln)
- China Buildings Completed, 2007-2014 (sqm mln)
- China Home Decoration and Improvement Market Size, 2008-2018 (RMB bn)
- Urban Population and Urbanization Rate in China, 2008-2018
- Per Capita Annual Disposable Income of Urban Household in China, 2008-2018 (RMB)
- Total Retail Sales of Consumer Goods in China, 2008-2018 (RMB bn)
- China Sanitary Ware Market Size, 2008-2014 (RMB bn)
- China Sanitary Ware Production, 2007-2014 (million pcs)
- China Ceramics Sanitary Ware Market Size, 2008-2014 (RMB bn)
- Penetration Rate of China Ceramics and Non-Ceramic Sanitary Ware, 2008-2014
- Main Competition Pattern of China Sanitary Ware Industry
- China Ceramic Sanitary Ware Market Share by Brand, 2014
- Export Volume of China Household Ceramic Ware, 2007-2014 (million tons)
- Export Value of China Household Ceramic Ware, 2007-2014 (USD mln)
- Monthly Export Price of China Household Ceramic Ware, 2007-2014 (USD/ton)
- Scale of Main Sanitary Ware Market Segments, 2014 (RMB bn)
- Competition Pattern of China Sanitary Ware Market Segments
- Major Smart Toilet Manufacturers and Brands in China
- China Sanitary Ware Market Size Forecast, 2014-2018 (RMB bn)
- China Ceramic Sanitary Ware Market Size Forecast, 2014-2018 (RMB bn)
- Penetration Rate Forecast of China Ceramics and Non-Ceramic Sanitary Ware, 2014-2018
- Distribution of Major Sanitary Ware Producing Area in China
- Production Layout of Major International Sanitary Ware Brands in China

- Production Layout of Major Domestic Sanitary Ware Manufacturers
- Sanitary Ware Production in Guangdong Province, 2007-2014 (pcs)
- Sanitary Ware Production in Fujian Province, 2007-2014 (pcs)
- Sanitary Ware Production in Zhejiang Province, 2007-2014 (pcs)
- Sanitary Ware Production in Henan Province, 2007-2014 (pcs)
- Sanitary Ware Production in Hebei Province, 2007-2014 (pcs)
- Sanitary Ware Production in Hubei Province, 2007-2014 (pcs)
- Sanitary Ware Production in Hunan Province, 2007-2014 (pcs)
- Main Products of KOHLER in China
- Core Technology of KOHLER
- Revenue and Net Income of TOTO, FY2009-2015 (JPY mln)
- Revenue Breakdown of TOTO by Business, FY2013-2015 (JPY bn)
- Revenue Breakdown of TOTO's Overseas Housing Equipment Business by Region, FY2013-2015 (JPY mln)
- Key Technologies Applied in Sanitary Ware of TOTO
- Distribution of Production/Sales Locations of TOTO in China
- Main Products of TOTO in China
- Revenue and Operating Income Forecast of TOTO, FY2013-2017
- Core Technology of RYOWA
- Sanitary Ware Products of ARROW
- Brands Run by LIXIL
- Revenue and Net Income of LIXIL, FY2009-2015 (JPY bn)
- Revenue Structure of LIXIL by Segment, FY2014
- Overseas Sales Revenue and Ratio of LIXIL, FY2014
- Main Product of INAX Brand
- Revenue and Net Income of Bolina, 2009-2014 (RMB mln)

- Revenue Breakdown of Bolina by Product, 2011-2014 (RMB mln)
- Revenue Breakdown of Bolina by Region, 2013-2014 (RMB mln)
- Revenue Breakdown of Bolina by Channel, 2011-2014 (RMB mln)
- Revenue Breakdown of Bolina by City Category, 2013-2014 (RMB mln)
- Sales Volume, Avery Selling Price and Revenue of Bolina by Product, 2013-2014
- Capacity, Output and Production Line of Bolina, 2009-2014
- Sanitary Ware Products of FAENZA
- Sanitary Ware Products of ANNWA
- Revenue and Net Income of HCG, 2008-2013 (NTB mln)
- Revenue and Net Income Forecast of HCG, 2012-2016 (RMB mln)
- Revenue Breakdown of HCG by Product, 2012-2014 (NTD mln)
- Revenue Breakdown of HCG by Region, 2012-2014 (NTD mln)
- Sanitary Ware Products of HCG
- Capacity, Output and Output Value of Main Products of HCG, 2013-2014 (NTD1,000)
- Sales Volume of Main Products of HCG, 2012-2014
- Sanitary Ware Products of HEGII
- Revenue and Net Income of Dongpeng, 2010-2014 (RMB mln)
- Revenue Breakdown of Dongpeng by Product, 2010-2014 (RMB mln)
- Revenue Structure of Dongpeng by Region, 2013-2014
- Gross Margin of Dongpeng, 2010-2014 (%)
- Main Sanity Ware Product of Ying
- Main Production Location of Ying
- Revenue and Net Income of Seagull, 2009-2014 (RMB mln)
- Revenue Breakdown of Seagull by Product, 2012-2014 (RMB mln)
- Revenue Breakdown of Seagull by Region, 2012-2014 (RMB mln)

- Main Production Bases and Business Networks of Seagull
- Revenue of JOYOU, 2009-2014
- EBIT of JOYOU, 2009-2014
- Revenue Structure of JOYOU by Product, 2013-2014
- Revenue Structure of JOYOU by Region, 2013-2014
- Gross Margin of JOYOU, 2009-2014
- Retail Network of JOYOU around China
- Main Sanity Ware Product of JOYOU
- Growth Strategy of JOYOU
- Sanity Ware Products of Appollo
- Marketing Network of Appollo in China
- Sanitary Ware Products of SUNLOT
- Production Bases of SUNLOT
- Main Products of MONARCH
- Revenue and Net Income of MONARCH, 2011-2013 (RMB mln)
- Revenue Structure of MONARCH by Product, 2011-2013
- Revenue Structure of MONARCH by Region, 2011-2013
- Gross Margin of MONARCH by Product, 2011-2013
- Output, Sales Volume and Capacity of Main Products of MONARCH, 2012-2013
- Unit Price of Main Products of MONARCH, 2011-2013
- Sales of MONARCH by Marketing Channel, 2011-2013
- Number of Dealers and Sales Status of MONARCH, 2011-2013
- Net Sales and Net Income of Roca, 2009-2013 (EUR mln)
- Main Bathroom Products of Roca
- Layout of Roca in China
- Revenue Breakdown of Roca in Asia-Pacific Region (EUR mln)

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