China Ceramic Tile Industry Report, 2015-2018

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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

After thirty years of rapid development, China's economy has entered a new normal state, in which real estate investment and development slows down, construction area declines and the demand for decoration falls. As a result, the architectural ceramics industry witnesses a lower growth rate. In 2015, the full-year revenue of the industry will reach RMB447 billion, a year-on-year increase of 4.9%.

China architectural ceramics industry has been booming nationwide through decades of development and several rounds of industrial transfer. There are now 1,452 ceramics enterprises and 3,621 production lines (including 181 Spanish tile production lines) in China except Beijing, Tianjin, Hong Kong, Macao and Taiwan, with the daily ceramic tile capacity of 45.036 million square meters, according to statistics of China Building Ceramics & Sanitaryware Association.

In terms of competition pattern, China building ceramics industry features a low market concentration rate. The top ten manufacturers have total annual capacity of 676 million square meters, only occupying 4.12% of the whole industry. With the implementation of new environmental protection laws, some of backward capacity will be phased out; meanwhile, the slow development of China's economy and real estate industry will lead to the fiercer market competition in the architectural ceramics industry, and mergers and acquisitions will be the mainstream of the industry.

As for manufacturers:

- China's largest architectural ceramics enterprise NewPearl Group is made up of Guangdong NewPearl Ceramics Group, Guangdong Summit Ceramics Group and Jiangxi NewPearl Ceramics Group, with the ceramic tile capacity of more than 200 million square meters;
- The second-ranked New Zhongyuan has nine production bases located in Foshan, Gao'an and other places, with the capacity of 100 million square meters;
- The third-ranked Nabel has set up its five production bases in Hangzhou, Jiujiang and Deqing, with the investment of more than USD425 million and the capacity of over 78 million square meters.
- Currently, Wonderful has the capacity of 58 million square meters. It plans to invest RMB3 billion in a project with the capacity of 40 million square meters in Chongqing. Once the project is completed in 2018, Wonderful's capacity will hit 100 million square meters and rank among top three.

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Capacity Distribution of China's Top 10 Ceramic Tile Origins

No.	Region	Daily Capacity (sqm mln)	Representative Manufacturers
1	Zhaoqing, Guangdong	3.93	NewPearl, Marshal Ceramics, Hongrun Ceramics
2	Foshan, Guangdong	3.30	Dong Peng , Hongyu, NewPearl, New Zhongyuan, Oceano, Bode, Monalisa
3	Jinjiang, Fujian	3.27	China Ceramics, Tengda Tile
4	Zibo, Shandong	3.09	Dong Peng, Tongyi Ceramics, Xinbo Ceramics, Guorun Ceramics
5	Gao'an, Jiangxi	2.62	NewPearl, New Zhongyuan, China Ceramics
6	Qingyuan, Guangdong	2.48	Dong Peng , Wonderful, Hongyu, Eagle Ceramics, Monalisa
7	Linyi, Shandong	1.97	Jiangquan Industry , Diwang Group
8	Jiangmen, Guangdong	1.66	NewPearl, Heshi Ceramics
9	Jiajiang, Sichuan	1.56	New Zhongyuan, Jintao, Jianhui Ceramics
10	Faku, Liaoning	1.18	New Zhongyuan
Total	-	25.06	-

Source: China Building Ceramics & Sanitaryware Association; ResearchInChina

China Ceramic Tile Industry Report, 2015-2018 studies the following:

- Overview of China ceramic tile industry, including product definition, classification, development process and major policies;
- Analysis of factors about China ceramic tile industry, such as real estate development and decoration industries;
- Overview of China ceramic tile industry, embracing market size, capacity, output, import and export, competitive landscape, etc.;
- Profile, financial condition, flagship products, capacity / output, R & D, distribution of production bases, technical characteristics and so on of 14 ceramic tile companies, namely Dong Peng, Wonderful, New Zhongyuan, NewPearl, Nabel, Eagle Ceramics, China Ceramics, Hongyu, Oceano, Bode, Monalisa, Shanghai Everjoy (formerly Cimic), Champion and Huida Sanitary Ware.

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