

China Ceramic Industry Report, 2010-2011

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Abstracts

Ceramic industry is a typical daily consumption industry, which is less affected by the economic cycle. China's ceramic industry, as a traditional competitive industry of the country, maintained a CAGR of 18.6% in 2005-2010, and accounts for 70% of the global ceramic output, with total output value exceeding RMB 170 billion, annual output and export value both ranking No.1 in the world. In Jan.-May 2011, China's ceramic industry achieved sales and total profit of RMB 72.75 billion and RMB4.76 billion respectively.

This report not only analyzes the overall development trend of ceramic industry, but also delves into the market conditions in five key provinces and five market segments in China.

China ceramic industry presents distinct regional concentration. In 2010, in terms of sales revenue, the top 4 provinces were Guangdong, Shandong, Jiangxi and Henan, whose total revenue and total profit accounted for 67.8% and nearly 80% of the nation's total respectively.

Regarding the market segments, there are building ceramic, household ceramic, special ceramic, sanitary ceramic and artistic ceramic. Occupying relatively large proportion of the industry, household ceramic achieved operating revenue of RMB60.189 billion in 2010, up 31.6% YoY. With excellent profitability, special ceramic achieved total profit of RMB5.76 billion in 2010, a rise of 71.44% against the previous year.

Although there are many ceramic manufacturers in China, the industry concentration degree is very low. The total operating income of top 10 enterprises merely accounts for less than 8% of the industry's total. Influenced by the weak foreign demand during 2008-2009 and relatively low gross margin of some products, most of the ceramic enterprises suffered losses, especially those household ceramic manufacturers.

Currently, in spite of the stagnant circumstance of household ceramic industry, artistic ceramic, with high collection value, has relatively huge development potential. In 2010, the Great Wall Group, whose main business focuses on artistic ceramic, realized the operating income of RMB357 million, up 11.48% YoY, wherein, the foreign sales accounted for 85.66% of its total sales. Meanwhile, artistic ceramic export value of the Great Wall Group ranked only second to Tangshan Yali Ceramic Co., Ltd., a 100% Italian invested enterprise.

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