

Research Report on China's Ceramic Industry, 2013-2017

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Abstracts

In 2011, the total industrial output value of China's ceramic industry was CNY 572.363 billion, with an increase of 35.35% YOY. The total output of China's ceramic tiles was 8,701,410 thousand square meters, with an increase of 14.86% YOY. The output of China's sanitary ceramic products reached 200 million, with an increase of 18.60% YOY. The sales revenue of China's ceramic industry was CNY 547.747 billion, with an increase of 35.45% YOY.

Guangdong Foshan architectural ceramic production base, Guangdong Chaozhou domestic, sanitary and art ceramic production base, Shandong Zibo domestic ceramic production base, Jiangxi Jingdezhen art ceramic production base, etc. are established in China. The development of the whole industry is characterized by regionalization, division of labor, production aggregation of same-type products, etc.

China is a "major" instead of "powerful" ceramic producing country, with the output ranking the first worldwide. Major Products are low and medium-end ones whose prices are inexpensive in the international market. Prices of the same type products only are fractions of that in ceramic powers such as Italy and Spain. Enterprises compete to hold down prices in order to contend for market because of excessive production capacity and oversupply of ceramics, which causes the continuous decline in industrial profits.

Due to the lack of independent innovation capability and severe product homogenization, the competitive strength of enterprises in the international market is not strong. The production of ceramic industry possesses obvious regional characteristics. The continuous expansion of enterprises and extension of production lines result in the severe overcapacity and imbalanced supply & demand, which also brings problems such as serious regional pollution and raw material resource

exhaustion. In the northwest, northeast and other regions, despite advantages in raw materials and energy, the overall level of ceramic industry lags behind because of the limitation of the overall economic level.

The export of China's ceramics is dominated by ceramic tiles in architectural ceramics. In 2011, the export volume of China's ceramic tile products was 1,015,280 thousand square meters, with an increase of 17.07% YOY. The export amount was USD 4.7644 billion, with an increase of 23.72% YOY. In 2011, the export of China's ceramic tile products to EU encountered the largest final verdict of anti-dumping. During this period, impacts of the EU's anti-dumping were exaggerated by media, to severely hit China's ceramic tile export.

According to data, the export of China's ceramic tiles comprehensively increased in 2011. Among it, Saudi Arabia, the United States and South Korea were still three major destination countries for the export of China's ceramic tiles, with relatively considerable growth. Export growth in India and Brazil made them become the fourth and sixth largest destination countries for the export of China's ceramic tiles. As for the export of ceramic tiles nationwide, Guangdong Province was still the largest export province of ceramic tiles, with the export volume and amount separately accounting for 70.71% and 79.21% of the whole country.

For more than a decade, China's ceramic tile products continuously suffer anti-dumping internationally. However, the export grows every year, so did it in 2011. Although the total export volume of China's ceramic tiles already ranks the first worldwide, the export of China's ceramic tile products only accounts for less than 15% of the total annual output of ceramic tiles at home, which is completely different from the relatively export-dependent sanitary (export>30%) and domestic (export>70%) ceramic industries in China. China's ceramic tile industry is less influenced by changes in international economic market.

The export of China's ceramic products is expected to continuously grow in the next few years.

More following information can be acquired through this report:

Supply and Demand Status of China's Ceramic Manufacturing

Development Status of China's Domestic/Sanitary/Architectural Ceramic Industries

Import and Export of China's Ceramic Products

Development of China's Ceramic Industry by Region

Operation of Key Enterprises of China's Ceramic Industry

Prediction on Development of China's Ceramic Industry

Following people are recommended to buy this report:

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Ceramic Trade Enterprises

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