

# Research Report on Chinese Ceramics Industry, 2010-2011

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## Abstracts

In China, the ceramics manufacturing industry includes four sub-industries – sanitary ceramics manufacture, special ceramics manufacture, domestic ceramics manufacture, manufacture of garden ceramics, artistic ceramics and other ceramics. In 2009, the production of domestic ceramics in China exceeded 15.01 billion, 23.23% increase over 2008; the production of sanitary ceramics was over 145 million, rising by 16.69% YOY; the production of ceramic wall and floor tiles totaled 5.38 billion m<sup>2</sup>, going up by over 15.41% YOY.

Ceramics produced in China are exported to near 200 countries and regions in the world. The annual production and export value of ceramics in China both rank the world Top. In 2009, Chinese ceramics production took up about 2/3 of the global total production and the number of ceramics producers in China exceeded 2,000.

In 2008, due to the financial crisis, Chinese ceramics industry underwent demand decline, significant reduction of export and considerable growth of inventory. Ceramics producers suffered great losses.

In 2009, the production and operation of Chinese ceramics industry took an upturn. The total output value maintained growth. Given the close relation between the ceramics industry and the trend of macro economy, the economic recovery is of great significance to the development of the ceramics industry.

The assets of Chinese ceramics industry mainly concentrate in Guangdong, Shandong, Jiangxi, Hebei, Hunan, Jiangsu, Fujian, Henan and Zhejiang, etc. The regions ranking among the Top by sales revenue are Guangdong, Shandong, Jiangxi, Hunan, Henan, Fujian, Jiangsu, Hebei, Guangxi and Zhejiang. The regions with relatively high profit

include Shandong, Jiangxi, Guangdong, Henan, Hunan, Fujian, Shanghai, Jiangsu and Zhejiang. The concentration of profit is higher than that of assets and sales revenue.

The demand of the downstream sectors for ceramics directly influences the supply and demand relation of the ceramics industry. The launch of “ceramics going to the countryside” policy will enlarge the ceramics demand in the domestic market. Internationally, the export of ceramics will increase rapidly with the gradual recovery of the global economy. In recent years, China’s status in the international ceramics market is raised continuously. The total production and export value of Chinese ceramics show an upward trend. Domestic ceramics still play a dominant role with the export proportion exceeding 30%. The export proportion of building ceramics was raised to rank the second. The export of artistic ceramics, sanitary ceramics and other ceramics all show gratifying growth momentum.

The demand in Chinese ceramics industry is predicted to increase by about 20% in 2010.

New types of ceramics developed independently by domestic enterprises emerge constantly. However, in terms of the whole ceramics industry of China, only a few enterprises have high-tech ceramics production lines. The backward equipment and weak technology R&D capacity are common problems in Chinese ceramics industry.

In general, the state of operation of Chinese ceramics industry in 2010-2011 will be better than the state in 2009. Related risks will prompt the industry to accelerate the structure adjustment. The advent of the high cost era will promote the transformation from low-end ceramics to medium-end and high-end ceramics in China.

Through this report, readers can acquire more information:

Status quo of Chinese ceramics industry

Status quo of Chinese domestic ceramics industry

Status quo of Chinese sanitary ceramics industry

Import and export of ceramics in China

Development of Chinese ceramics industry by region

Operation of major enterprises in Chinese ceramics industry

Prediction on the development of Chinese ceramics industry

Following persons are recommended to buy this report:

Ceramics producers

Ceramics traders

Investors concerning the ceramics industry

Ceramics related enterprises

Research institutes concerning Chinese ceramics industry

## Contents

### **1 GENERAL DESCRIPTION OF CHINESE CERAMICS INDUSTRY**

- 1.1 Definition and Classification of Ceramics Industry
- 1.2 Functions of Chinese Ceramics Industry to National Economy
- 1.3 Status Quo of Chinese Ceramics Industry
  - 1.3.1 Production
  - 1.3.2 Sales
  - 1.3.3 Investment and Financing

### **2 ANALYSIS ON DEVELOPMENT ENVIRONMENT OF CHINESE CERAMICS INDUSTRY, 2009-2010**

- 2.1 Macroeconomic Environment
- 2.2 Governmental Policy Environment
- 2.3 Analysis on Social Environment of Chinese Ceramics Industry, 2009-2010
  - 2.3.1 Overview of Social Environment
  - 2.3.2 Major Social Environmental Factors Affecting the Development of Ceramics Industry
  - 2.3.3 Development Tendency of Chinese Ceramics Industry under Social Environmental Changes

### **3 ANALYSIS ON CHINESE CERAMICS INDUSTRY CHAIN, 2009-2010**

- 3.1 Introduction to Chinese Ceramics Industry Chain
- 3.2 Analysis on Upstream Sectors of Chinese Ceramics Industry, 2009-2010
  - 3.2.1 Kaolin Production
  - 3.2.2 Kaolin Demand
  - 3.2.3 Influence of Upstream Sectors on Chinese Ceramics Industry
  - 3.2.4 Influence of Downstream Sectors on Chinese Ceramics Industry

### **4 ANALYSIS AND PREDICTION ON IMPORT AND EXPORT OF CHINESE CERAMICS INDUSTRY, 2009-2010**

- 4.1 Analysis on Import of Chinese Ceramics Industry, 2009-2010
  - 4.1.1 Import Volume and Value
  - 4.1.2 Import Structure, 2009-2010
  - 4.1.3 Import Characteristics, 2009

#### 4.2 Analysis on Export of Chinese Ceramics Industry, 2009-2010

- 4.2.1 Export Volume and Value
- 4.2.2 Export Structure, 2009-2010
- 4.2.3 Export Characteristics, 2009
- 4.2.4 Prediction on Chinese Ceramics Export, 2010

### **5 DEVELOPMENT OF CHINESE CERAMICS INDUSTRY BY REGION, 2009-2010**

#### 5.1 Analysis on Regional Distribution of Chinese Ceramics Industry, 2009-2010

- 5.1.1 Characteristics of Regional Distribution
- 5.1.2 Analysis of Regional Distribution by Scale Indicator
- 5.1.3 Analysis of Regional Distribution by Effectiveness Indicator

#### 5.2 Analysis and Prediction on Development of Guangdong Ceramics Industry

- 5.2.1 Scale
- 5.2.2 Economic Operation
- 5.2.3 Comparison of Sub-industries
- 5.2.4 Development Tendency

#### 5.3 Analysis and Prediction on Development of Shandong Ceramics Industry

- 5.3.1 Scale
- 5.3.2 Economic Operation
- 5.3.3 Sub-industries
- 5.3.4 Development Tendency

#### 5.4 Analysis and Prediction on Jiangxi Ceramics Industry

- 5.4.1 Scale
- 5.4.2 Economic Operation
- 5.4.3 Sub-industries
- 5.4.4 Development Tendency

### **6 ANALYSIS ON SUB-INDUSTRIES OF CHINESE CERAMICS INDUSTRY, 2009-2010**

#### 6.1 Analysis on Chinese Sanitary Ceramics Industry, 2009-2010

- 6.1.1 Industry Scale
- 6.1.2 Supply and Demand
- 6.1.3 Operation Characteristics
- 6.1.4 Development Tendency

#### 6.2 Analysis on Chinese Special Ceramics Industry, 2009-2010

- 6.2.1 Industry Scale
- 6.2.2 Supply and Demand

- 6.2.3 Operation Characteristics
- 6.2.4 Development Tendency
- 6.3 Analysis on Chinese Domestic Ceramics Industry, 2009-2010
  - 6.3.1 Industry Scale
  - 6.3.2 Supply and Demand
  - 6.3.3 Operation Characteristics
  - 6.3.4 Development Tendency
- 6.4 Analysis on Chinese Garden, Artistic and Other Ceramics Industry, 2009-2010
  - 6.4.1 Industry Scale
  - 6.4.2 Supply and Demand
  - 6.4.3 Operation Characteristics
  - 6.4.4 Development Tendency

## **7 ANALYSIS ON MAJOR ENTERPRISES IN CHINESE CERAMICS INDUSTRY, 2009-2010**

- 7.1 Analysis on Listed Companies in Chinese Ceramics Industry
  - 7.1.1 Ranking by Profitability
  - 7.1.2 Ranking by Operation Capacity
  - 7.1.3 Ranking by Repayment Capability
  - 7.1.4 Ranking by Development Capacity
  - 7.1.5 Ranking by Comprehensive Competence
- 7.2 Tangshan Ceramic Stock Co., Ltd
  - 7.2.1 Overview
  - 7.2.2 Operation
  - 7.2.3 Development Strategy
- 7.3 Shanghai CIMIC Tile Co., Ltd
  - 7.3.1 Overview
  - 7.3.2 Operation
  - 7.3.3 Development Strategy
- 7.4 Fujian Guanfu Modern Household Wares Co., Ltd
  - 7.4.1 Overview
  - 7.4.2 Operation
  - 7.4.3 Development Strategy
- 7.5 Jiangsu Gaochun Ceramics Co., Ltd
- 7.6 Yuyuan Holding Co., Ltd

## **8 ANALYSIS ON RISKS IN CHINESE CERAMICS INDUSTRY, 2009-2010**

- 8.1 Macroeconomic Risk
- 8.2 Policy Risk
- 8.3 Technology Risk
- 8.4 Supply and Demand Risk
- 8.5 Correlated Industry Risk
- 8.6 Product Structure Risk

## **9 PREDICTION ON INVESTMENT AND DEVELOPMENT OF CHINESE CERAMICS INDUSTRY, 2010-2012**

- 9.1 Prediction on Investment Opportunities
- 9.2 Development Recommendations

## Selected Charts

### SELECTED CHARTS

Chart Sub-industries of Chinese Ceramics Industry

Chart Proportion of the Total Output Value of Chinese Ceramics Industry in GDP, 2005-2009

Chart Contribution of Chinese Ceramics Industry to National Economy

Chart Total Output Value of Chinese Ceramics Industry, 2005-2009

Chart Production of Domestic Ceramics in China, 2005-2009

Chart Production of Sanitary Ceramics in China, 2005-2009

Chart Sales Revenue of Chinese Ceramics Industry, 2005-2009

Chart Sales of Major Ceramics in China

Chart Average Price of Major Products in Chinese Ceramics Industry, 2005-2009

Chart Major M&A Events in Chinese Ceramics Industry, 2009-2010

Chart Operation of Tangshan Ceramic Stock Co., Ltd, 2005-2009

Chart Operation of Shanghai CIMIC Tile Co., Ltd, 2005-2009

Chart Concentration of Chinese Ceramics Industry, 2005-2009

Chart Prediction on Sales Revenue of Chinese Ceramics Industry, 2010-2014



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