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 m2, 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.

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