China Ceramic Tile Industry Report, 2015-2018

Description:
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.

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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