

China

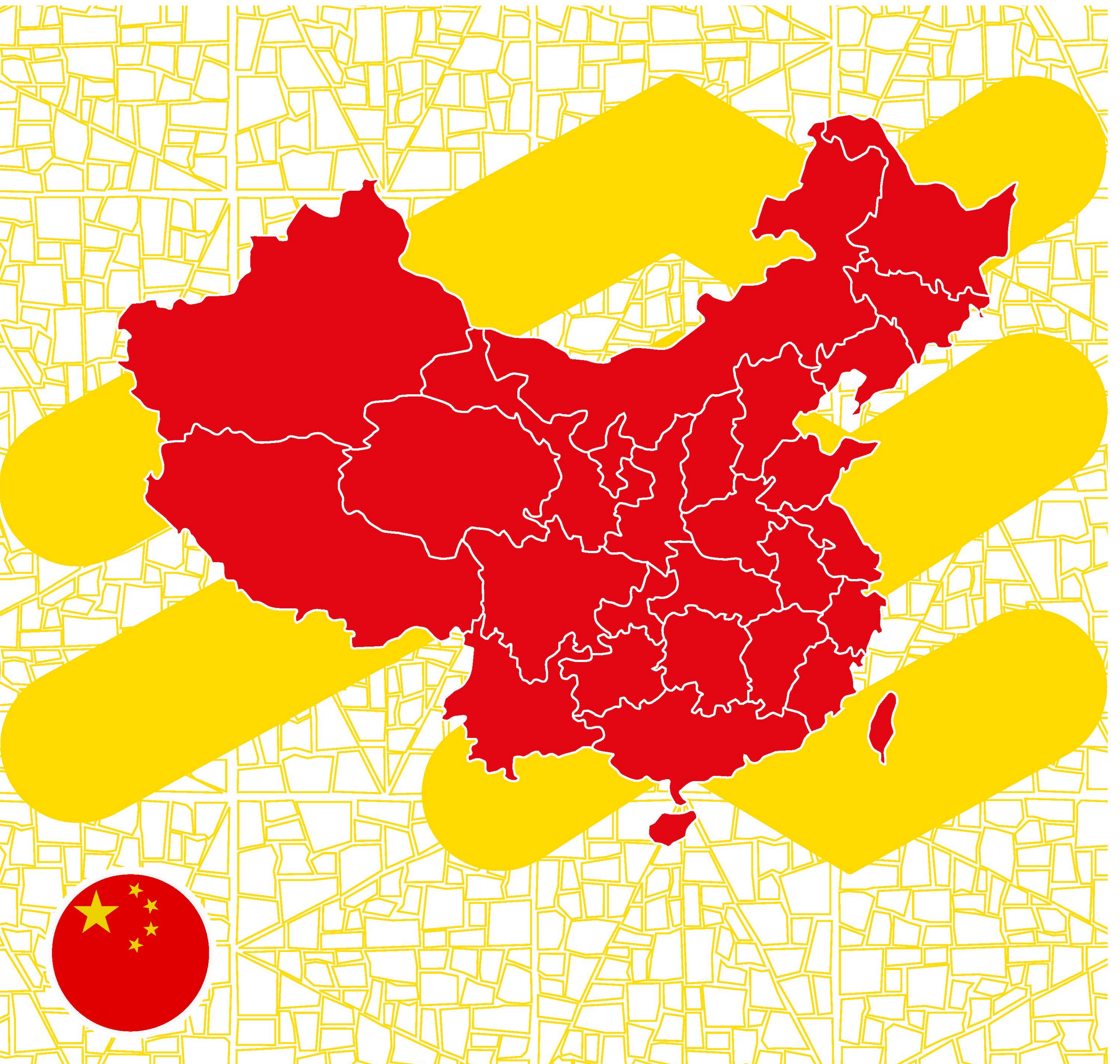
Ceramic Tiles & Slabs

EDITION 2021

Identikit of more than
1,000 companies:
Products, capacity, pro-

duction lines,
Brands and investments
Edition Year 2021

A journey through the world largest producer country



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- ALPHABETICAL LIST OF COMPANIES PER REGION

AHANHUI	HEHEBEI	JXJIANGXI	SXSHANXI
CQCHONGQING	HLHEILONGJIANG	JLJILIN	SCSICHUAN
FJFUJIAN	HAHENAN	LNLIAONING	TJTIANJIN
GSGANSU	HBHUBEI	NXNINGXIA	XJXINJIANG
GDGUANGDONG	HNHUNAN	SNSHAANXI	YNYUNNAN
GXGUANGXI	NMINNER MONGOLIA	SDSHANDONG	ZJZHEJIANG
GZGUIZHOU	JSJIANGSU	SHSHANGHAI	

LIST OF 1,161 NAMES

the finale part of the report contains complete sheet of companies

A 472
A 473
A 473
A 474
A 474
613
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Abstract

This report provides a complete and detailed overview of all the large and small Chinese ceramic producers with information on the location of plants, installed production lines, current and planned investments and - where available - data on turnover and employees. It is also a useful tool for investigating the characteristics and economic strength of the 27 regions of China where ceramic tiles and slabs are produced.

*After a brief **overview** of the **Chinese ceramic production with overall figures**, the study starts with an analysis of **manufacturing companies, production lines, production capacity** with **trends over the last ten years** and a **focus on investment**, with particular attention to **porcelain slabs**. It also features a series of maps that help to set all the indicators within a clear **geographical context**.*

*The third section presents ceramic production divided up by **product type and the field of specialization of the different Chinese regions**. It provides nomenclature for the different product categories and definitions of tiles used in the Chinese market and attempts to bring them into line with the standards most widely in use in the western market.*

*The fourth section presents the **top ceramic manufacturing groups/companies in detail**: the 25 leading players produce around 20% of China's ceramic tiles and slabs.*

*The fifth section looks at **the individual regions** in greater detail with a country profile and overview of key figures, followed by details of the development of companies, lines, production capacity and tile types for each of the 27 regions from 2011 to 2020.*

*The final section provides **unique information on each of the 1,161 Chinese ceramic companies**, with data sheets divided up by region and in alphabetical order. To make the Chinese names (and their English translations or transliterations) clearer, images of the company's logo and/or brand are provided, along with the unique governmental identification code and data on the company's size, location, year of foundation, production capacity, area of specialization and current or planned investments.*

Key numbers



N. Companies
1,161



N. Employees
462,529



Slab lines
173

589 mln sqm/year
capacity



Tile lines
2,275

12.4 bln sqm/year
capacity



Investments
247

of which 59 slab lines

Roof lines
297

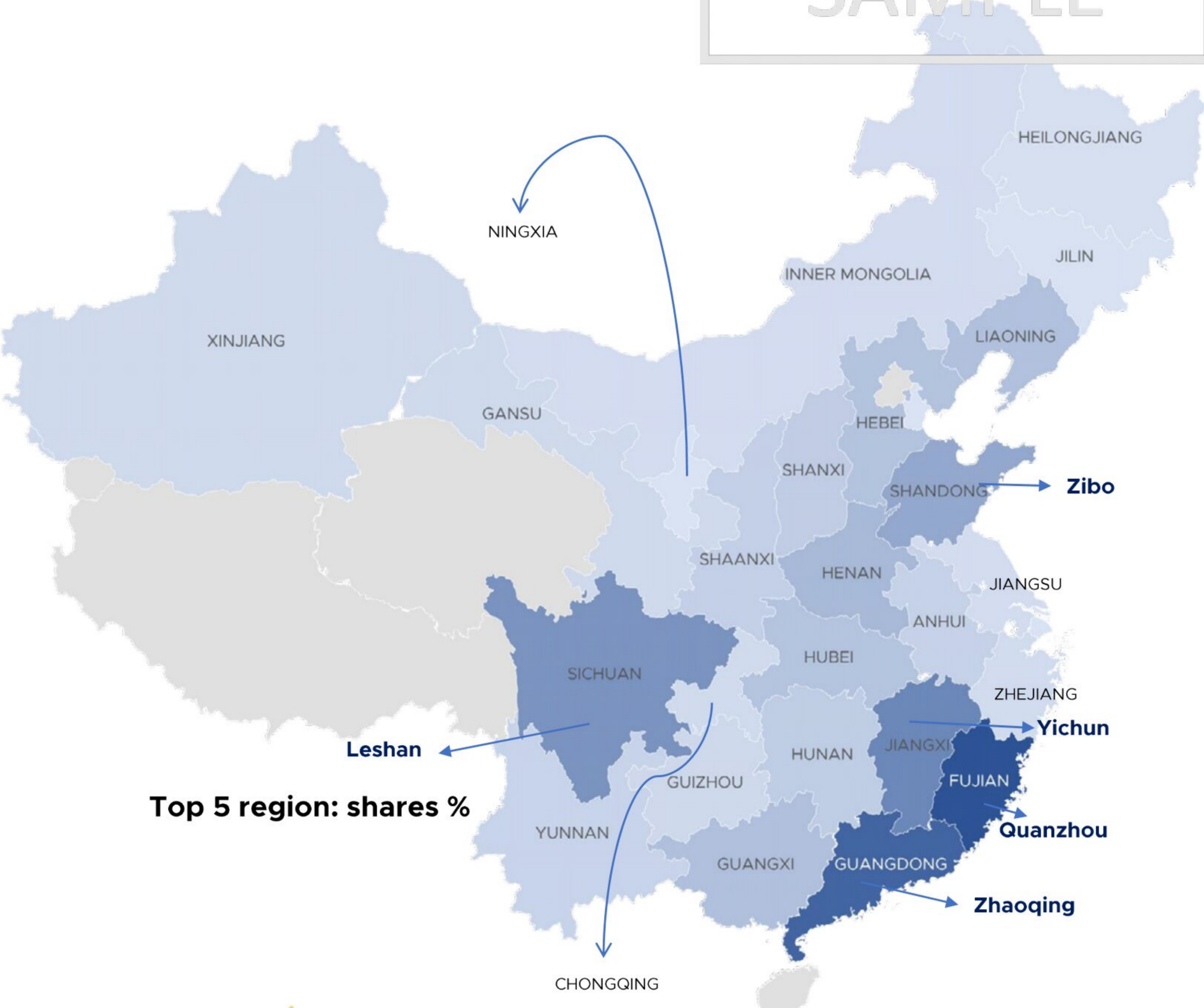


Roof tile production capacity: 2.5 bln sqm/year (12.5 bln pcs/year)
8.04 mln sqm/day capacity (40.2 mln pcs/day capacity)

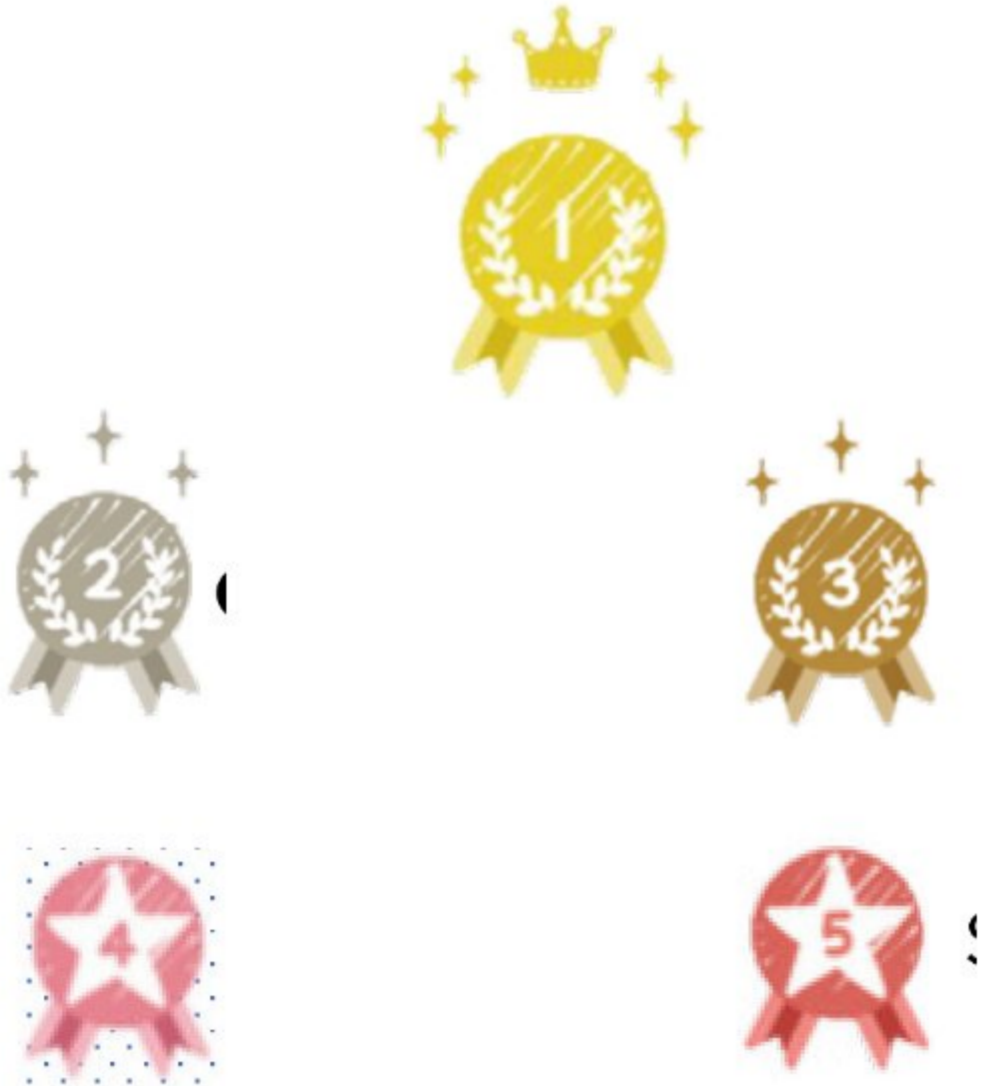
(5 pcs of roof tiles = 1 sqm)

Map of companies

SAMPLE



Top 5 region: shares %

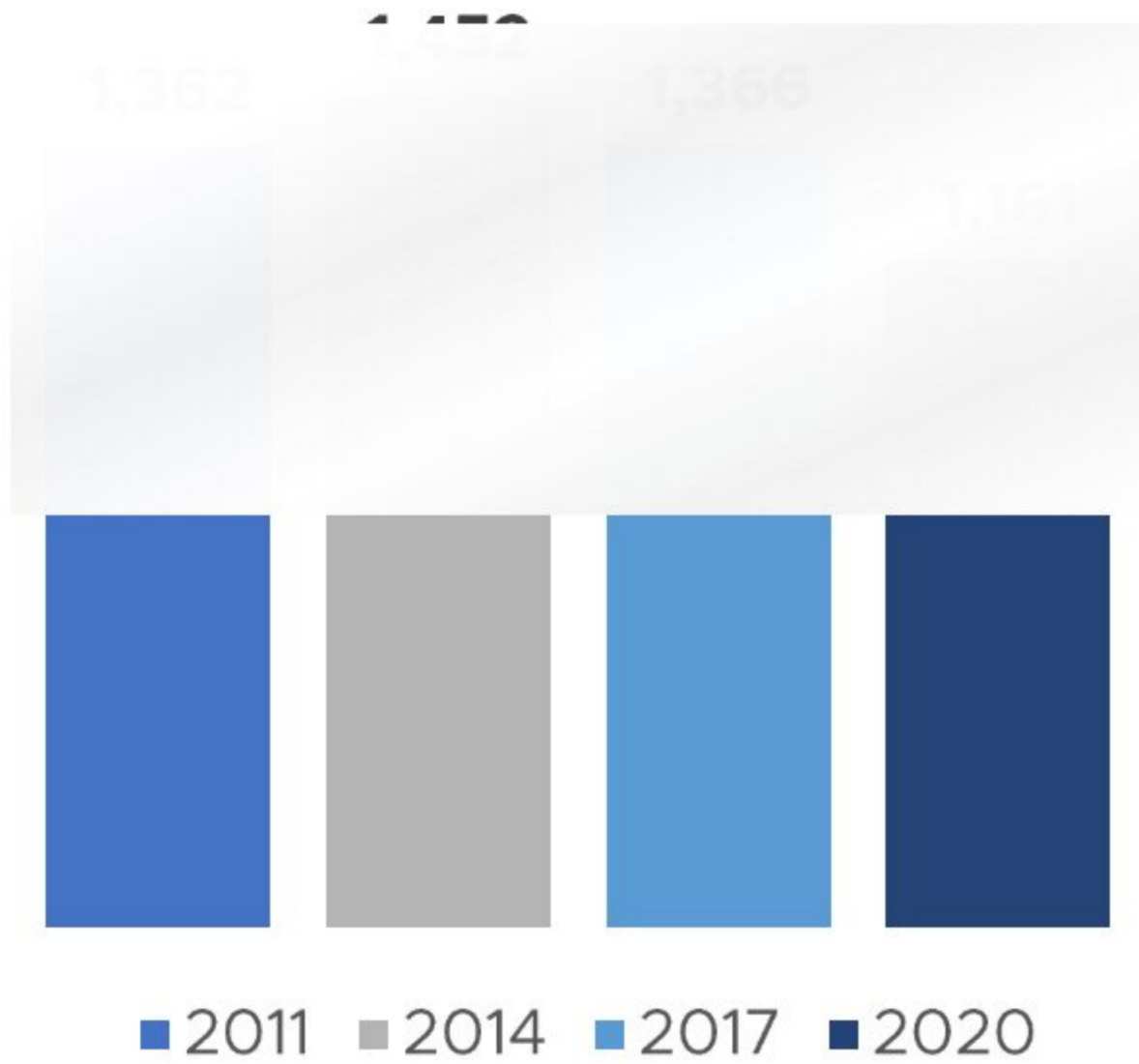


REGION	COMPANIES
FUJIAN	193
GUANGDONG	174
JIANGXI	105
SICHUAN	100
SHANDONG	92
HENAN	83
GUANGXI	83
OTHER REGIONS	5
TOTAL	1,101

Ten-year evolution (2011-2020)

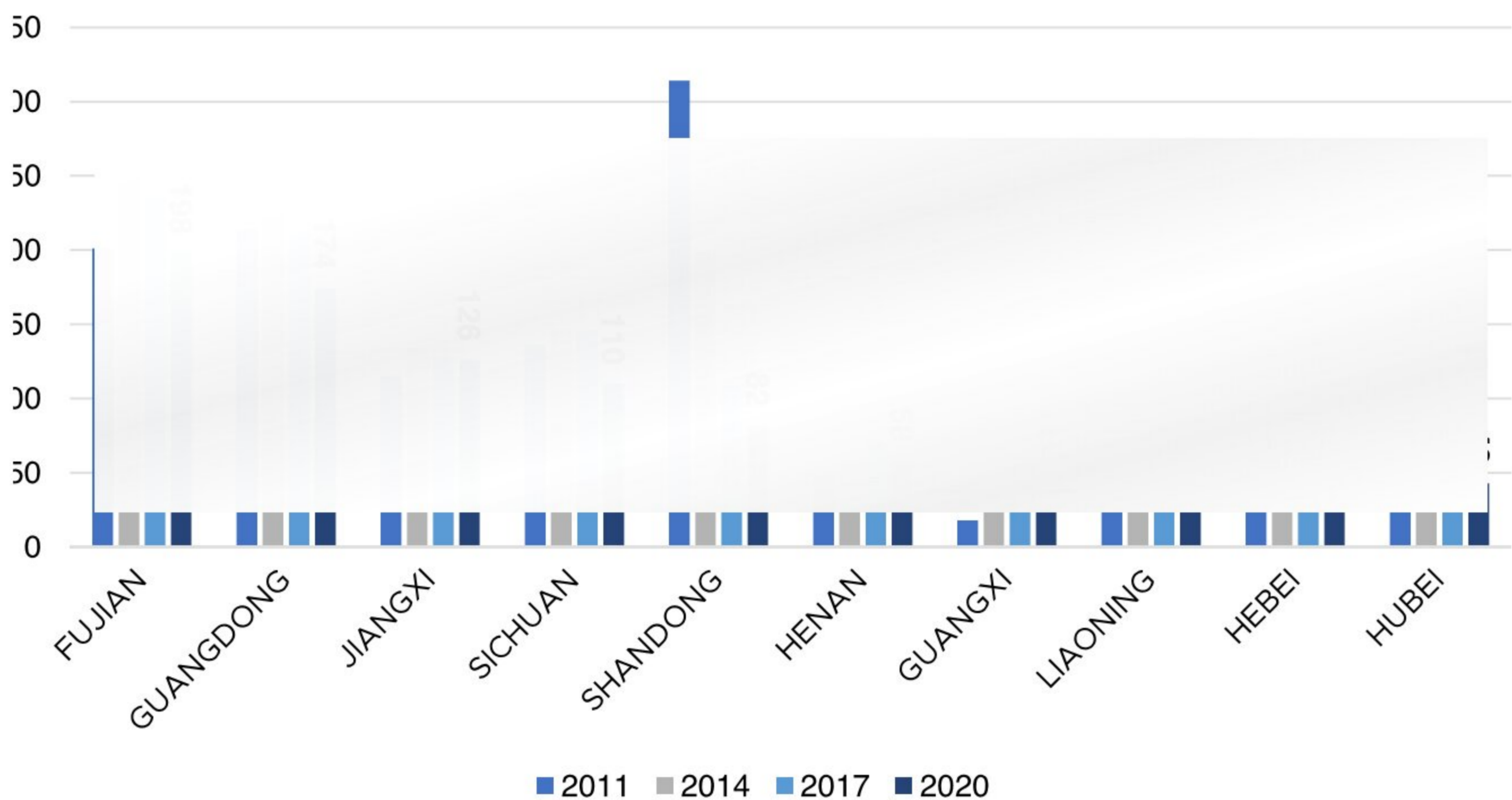


The trend



The number of Chinese ceramic companies has decreased by 15% in the last decade (from 1,362 companies to 1,161), but if the comparison is made on 2014 - peak year of activity - the drop is high as 20%. The decrease has not affected uniformly, quite the contrary.

Number of companies in 2011-2020 (Top 10 regions)



Among the areas with the greatest ceramic vocation there are regions such as Guangdong and Sichuan where one company in six closed. Shandong, the most important ceramic region in China, where three out of four ceramic companies disappeared from the map, down from 314 to 232 companies between 2011 and 2020.

Number of manufacturing companies per region in 2011-2020

SAMPLE

Region	2011	2014	2017	2020	Var % 20/11	Var % 20/17	Shares % 2020
FUJIAN	221	246	225	199	-15	-15.7	17.1
GUANGDONG	214	223	210	174	-18.7	-17.5	15.0
JIANGXI	115	134	125	126	9.6	-2.3	10.9
SICHUAN	138	147	145	110	-19.1	-24.7	9.5
SHANDONG	314	199	103	82	-73.9	-24.8	7.1
HENAN	47	63	71	58	23.4	-18.3	5.0
GUANGXI	19	47	47	48	166.7	2.1	4.1
LIAONING	53	55	60	47	-11.3	-21.7	4.0
HEBEI	38	51	53	45	18.4	-15.1	3.9
HUBEI	38	49	45	43	13.2	-4.4	3.7
HUNAN	16	27	35	32	100.0	-8.6	2.8
SHANXI	27	31	31	31	14.8	0.0	2.7
SHAANXI	29	31	33	27	-6.6	-18.2	2.3
ANHUI	19	22	30	24	26.3	-20.0	2.1
YUNNAN	12	16	19	22	83.3	16.2	1.9
GUIZHOU	10	13	16	15	50.0	-6.2	1.3
GANSU	7	15	17	14	100.0	20.6	1.2
XINJIANG	16	19	15	13	-18.8	-20.0	1.1
CHONGQING	8	8	11	12	50.0	9.1	1.0
ZHEJIANG	8	10	23	11	37.5	-52.2	0.9
INNER MONGOLIA	5	10	6	9	80.0	50.0	0.8
JIANGSU	15	14	9	9	-40.0	0.0	0.8
HEILONGJIANG	1	3	4	5	400.0	25.0	0.4
JILIN	6	6	5	3	-50.0	-40.0	0.3
NINGXIA	3	3	1	1	-66.7	-100.0	0.1
SHANGHAI	3	2	2	1	-66.7	-50.0	0.1
TIANJIN	0	0	1	1	100.0	100.0	0.1
QINGHAI	1	1	1	0	-100.0	-100.0	0.0
HAINAN	1	1	1	0	-100.0	-100.0	0.0
TIBET	1	1	0	0	-100.0	-100.0	0.0
TOTAL COMPANIES	1,352	1,452	1,355	1,151	-14.9	-15.9	100.0

5. Ceramic investment in China

The most interesting aspect for Western companies operating in the ceramics industry is certainly to understand how Chinese competitors are performing, i.e. in which types of products and technologies they are investing primarily. Data on investments in the ceramics industry is updated by MECS

At the time of publishing this report, 56 new ceramic production lines are under construction in China and there are plans for a further 191 lines. This means that a total of 247 more lines will be built in the next three years, accounting for 10% of the lines currently installed in the country. Of these, 59 will be for the production of slabs.

Over 40% of new lines are for slabs

REGION	COMPANY	LINES	SLABS
JIANGXI		15	19
GUANGXI		4	2
GUANGDONG		7	3
SICHUAN		7	0
XINJIANG		2	1
ANHUI		2	2
HUBEI		1	2
FUJIAN		1	1
GUIZHOU		1	1
HUNAN		1	1
INNER MONGOLIA		1	0

Of the 56 new production lines being built in 2021, 20 (35%) are in Jiangxi, 9 in Guangxi and 8 each in Guangdong and Sichuan.

Almost half of the new lines (23 out of 56, 41%) will produce slabs, 12 of which are being built in Jiangxi and 2 in Sichuan, 3 in Guangdong

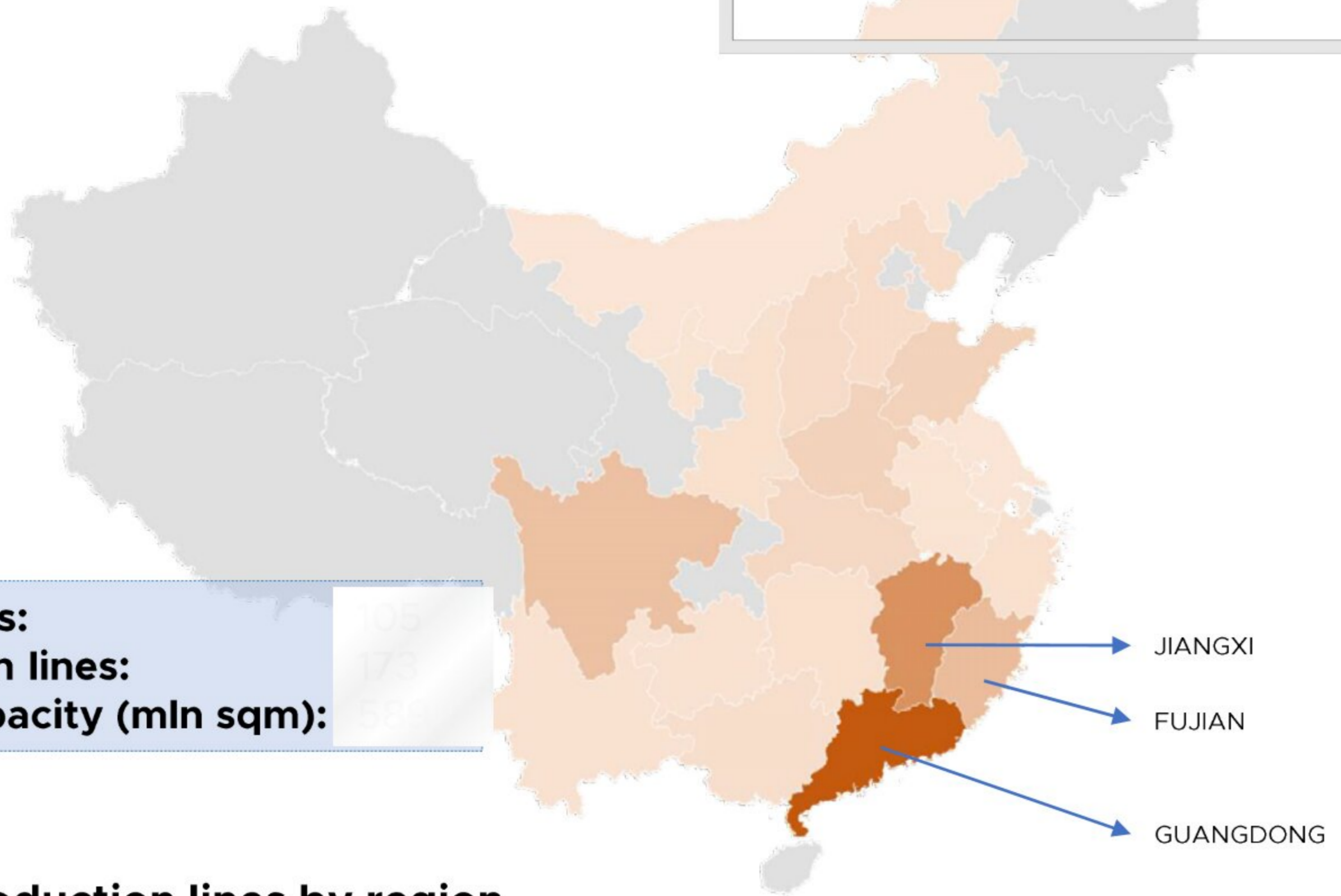
36 new slab lines are planned

REGION	COMPANY	LINES	SLABS
GUANGDONG		21	22
GUANGXI		11	1
HUNAN		3	1
JIANGXI		5	0
CHONGQING		2	11
SICHUAN		7	8
HEBEI		2	7
SHANDONG		3	3
XINJIANG		2	2
HUBEI		2	0
GUIZHOU		1	0

The new investments planned for 2021 and 2023 will be built mainly in Guangdong (75 lines out of 191, 39% of the total), Guangxi (49 lines, 26%) and Hunan (20, 10%). 36 slab production lines account for 18.8% of the total (191 of 131), and they will be located in Guangdong (2, 61% of the total), Chongqing (11), Hebei and Guizhou (2), Hubei (2) and Guangxi (1).



1. Slabs

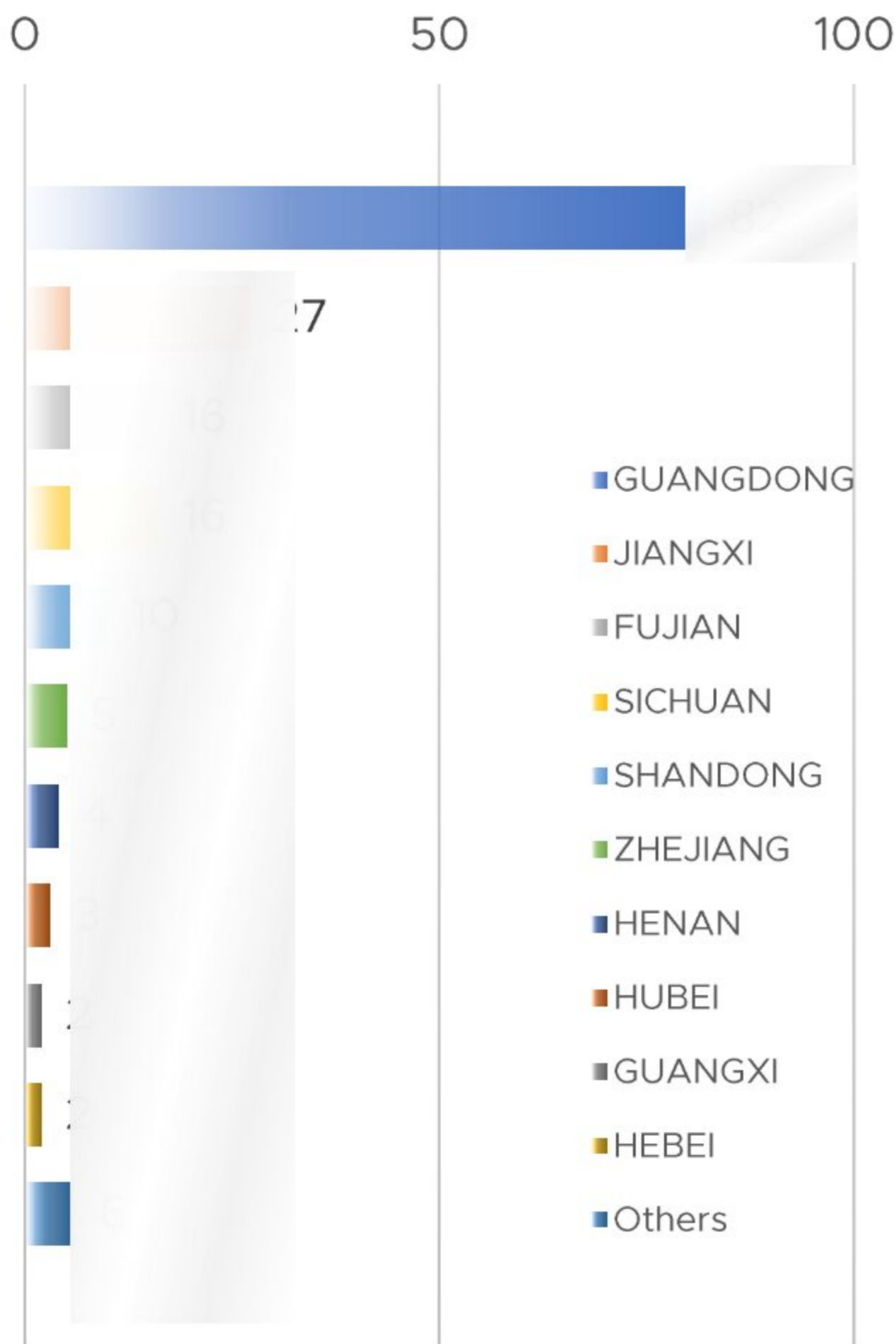


Companies: 105
Production lines: 173
Yearly capacity (mln sqm): 585

JIANGXI
 FUJIAN
 GUANGDONG

Slabs: production lines by region

The map refers to the number of production lines



There are currently 173 ceramic slab lines installed in 105 manufacturing companies in China, concentrated as usual in the south-east, between Guangdong, Jiangxi and Fujian.

Guangdong also leads in the ranking by production lines (82 out of 173, 47% of the total) followed by Jiangxi with 27, and Fujian and Sichuan with 16 lines each. Also by production capacity Guangdong is first with 41% of the total slab capacity. Another 39% of capacity is installed in Jiangxi. Sichuan ranks in: the four regions together with 80% of China's slab production capacity.

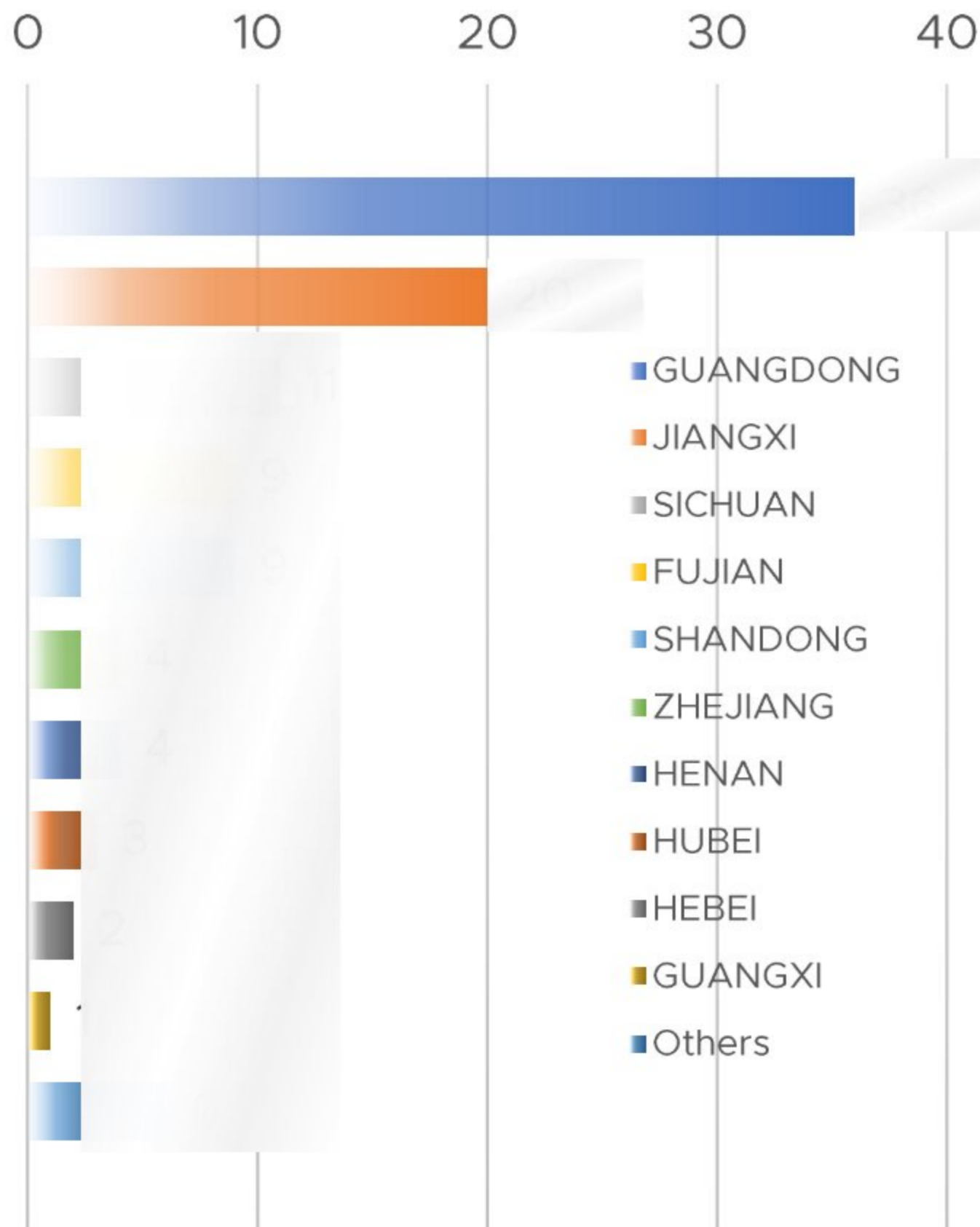
Slab production is sure to increase by 2023, considering the 100 million lines to be installed, mainly in Guangdong (5), Jiangxi (12) and Sichuan (5).



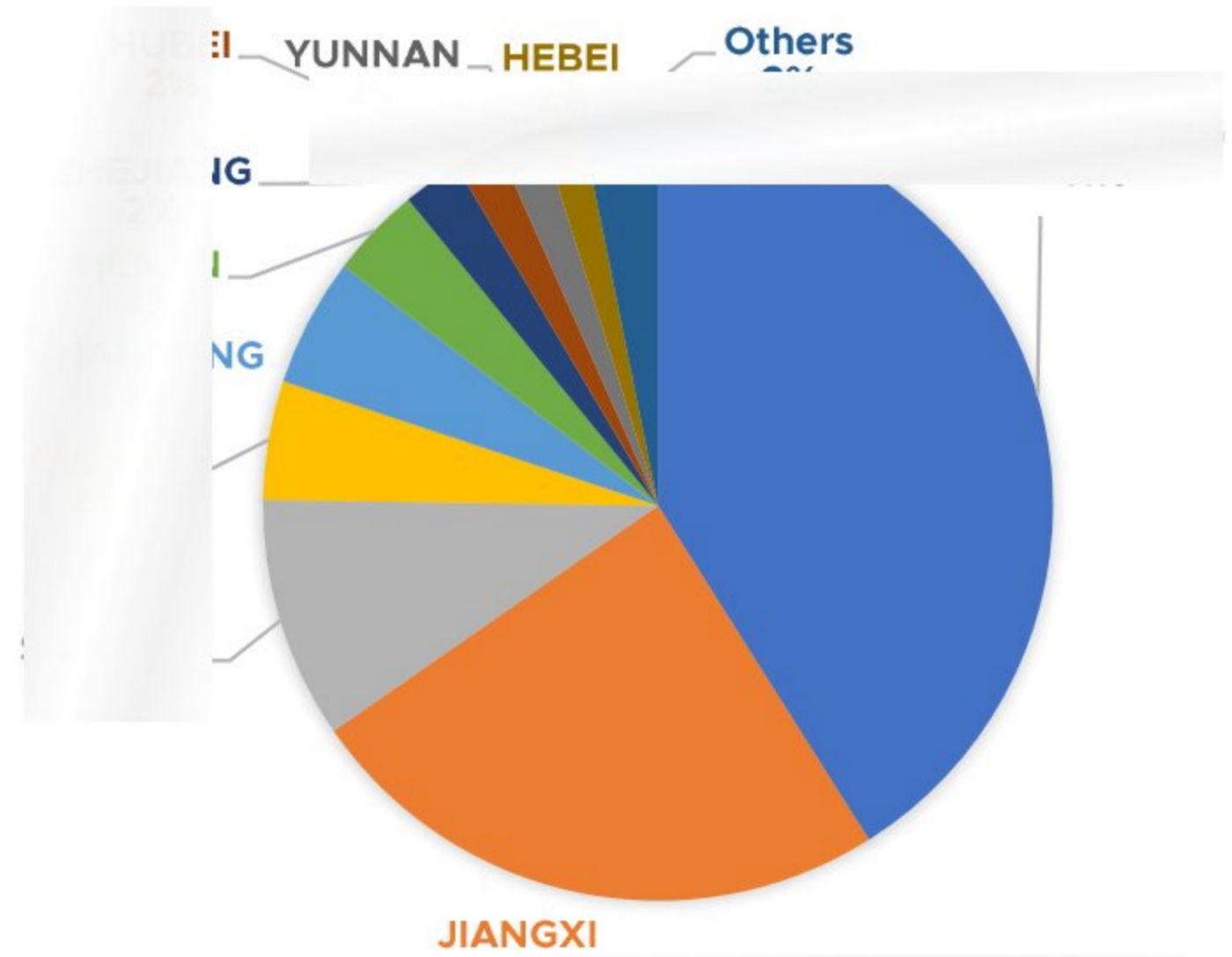
SLABS

SAMPLE

Companies by region



Production capacity by region



Slab manufacturing companies (by production capacity) are mainly concentrated in Guangdong (36 out of 105 companies, 34.3% of the total), followed by Jiangxi (20, 19%), and Sichuan (19, 18%).

Top 15 slab companies

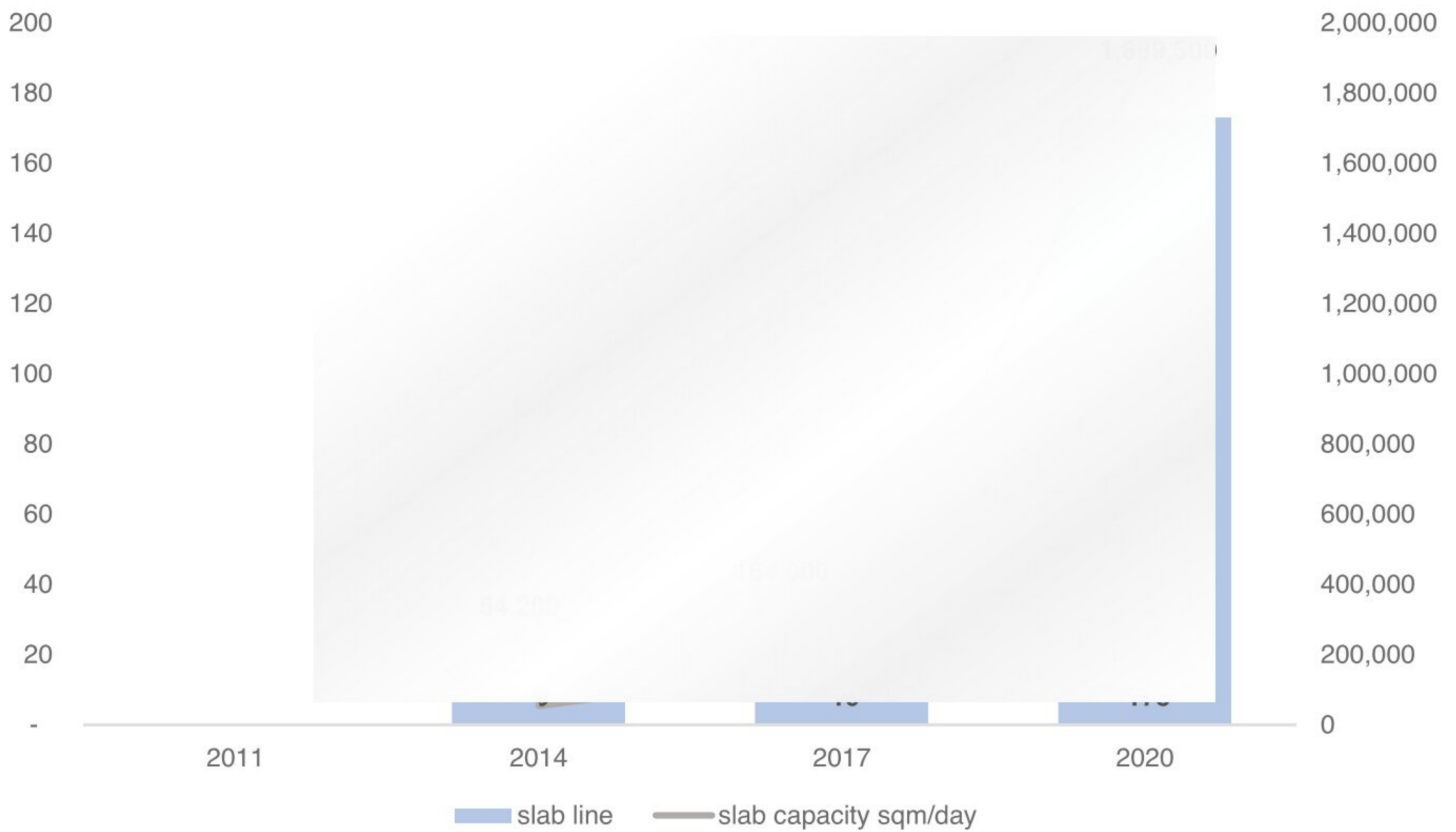
Name	City	Regions	Lines	Capacity/year (mIn sqm)	cap/lines
Guangdong Jialian Enterprise Ceramics Co., Ltd.	ZHAOQING	Guangdong	6	17.4	2.9
Emeishan Jintao Ceramics Industry Development Co., Ltd.	LESHAN	Sichuan	6	16.1	2.7
Enping Xiangda Ceramics Co., Ltd.	JIANGMEN	Guangdong	3	14.3	4.8
Guangdong Jiabin Ceramics Co., Ltd.	ZHAOQING	Guangdong	5	14.0	2.8
Jiangxi Xinruijing Ceramics Co., Ltd.	YICHUN	Jiangxi	2	14.0	7.0
Jiangxi Lousi Ceramics Co., Ltd.	YICHUN	Jiangxi	2	13.2	6.6
Zhaoqing Jiangjun Ceramics Co., Ltd.	ZHAOQING	Guangdong	4	12.4	3.1
Jiangxi Jinliyuan Ceramics Co., Ltd.	YICHUN	Jiangxi	2	11.8	5.9
Jiangxi Shenzhou Ceramics Co., Ltd.	YICHUN	Jiangxi	1	11.2	11.2
Guangdong Jinpai Ceramics Co., Ltd.	FOSHAN	Guangdong	3	11.2	3.7
Guangdong Summit Ceramics Co., Ltd.	ZHAOQING	Guangdong	5	11.2	2.2
Jiangxi Xinjingxiang Ceramics Co., Ltd.	YICHUN	Jiangxi	1	11.2	11.2
Yunnan Yimen Jiahe Porcelain Co., Ltd.	YUNNAN	Yunnan	1	11.2	11.2
Jiangxi Xinhuanbao Ceramics Co., Ltd.	JIUJIANG	Jiangxi	1	11.2	11.2
Jiangxi Dongyuan Ceramics Co., Ltd.	YICHUN	Jiangxi	1	9.9	9.9



Ten years ago, not a single square metre of slabs was being produced in China. The first production lines were set up in 2014. In 2017 there were only 13 slab production lines, corresponding to a daily capacity of 154,000 sqm.

13 in 2017, 139 in three years, with a production capacity of 1.9 million sqm, a tenfold increase in just three years. And this trend does not seem to be stopping: 59 new lines are due to be built by 2020.

Slab lines + daily production capacity 2011-2020 (sqm)



Slab production city

City	Regions	Lines	Capacity / year (mln pcs)	Capacity / line
YICHUN	Jiangxi	25	127.6	.1
ZHANGJING	Guangdong	40	115.6	.9
FOSHAN	Guangdong	20	45.3	.5
LESHAN	Sichuan	13	37.7	.7
QINGYUAN	Guangdong	15	43.5	.9

Glossary: Tile type descriptions



The following pages contain a description of the different categories into which ceramic products have been sorted, using criteria that are more understandable to the Western market (the roof tile segment will not be discussed in detail here).

In particular, the tiles macro-category is divided up in this report, according to Chinese statistics, into: rustic, polished, glazed, thin (four categories mostly for indoor floor use), indoor wall, outdoor floor and outdoor wall.

The Chinese market use different categories-labels to categorize ceramic floor and wall materials. Among tiles, slabs and panels you can find descriptions of over 150 different

types of ceramic products, which are often very similar to each other and differ, for example, only by a few centimeters in size or different uses.

The standardization work conducted in this study involved a degree of simplification and consequently loss of detail.

If you need even more detailed data than those contained in this study please contact :

Mecs Research Center
info@mecs.org
 +39 059 723 18 70 (Italy)

Top 25 groups*

Group	Headquarters	Factories	Number of factories	Lines	Cap / Year (mln sqm)
NEW DEARL group	Guangdong	GD, HD, JX	4	44	222.0
WONDERFUL group	Guangdong	GD, CO, JX	6	53	204.9
HUA SHUO	Jiangxi		4	18	140.0
HONGYU group	Guangdong	GD	4	48	137.3
DONGPENG group	Guangdong	SD, SX, CQ, HN, JX, GD	6	31	134.8
QUANYE	Guangdong	GX, GD	4	13	132.4
MORALISA group	Guangdong	JX, GX, GD	4	34	111.0
HACSHENG	Guangdong	GD	3	17	107.6
SHUICHENG	Guangdong	GD	3	22	97.7
TAIYANG	Jiangxi	JX	4	14	83.4
NEW JINCHENG group	Guangdong	GD	3	15	80.0
CHUYI	Guangdong	GX, GD	2	10	70.6
XINZHONGYUAN group	Guangdong	LN, HA, HB, HN, JX, GD	7	20	69.1
OCEANO	Guangdong	JX, GX, GD	6	25	65.5
ANJ	Guangdong	GD	1	5	51.5
RIRISHENG	Henan	HA	2	5	49.9
ZHONGSHENG	Guangdong	GD	3	5	43.3
RUIYANG	Jiangxi	JX	1	3	36.6
MILANO	Sichuan	GZ, SC	2	3	31.1
WHITE RABBIT	Guangdong	HN, GD	2	3	29.9
OUYA	Guangdong	JX, GD	2	3	28.8
Golden ceramics group	Jiangxi		1	2	27.2
QUANSHENG	Guangdong	GD	1	2	26.7
JINYI	Shaanxi	SN	1	2	26.1
XIANJIA	Guangdong	GD	1	2	25.1

GD: Guangdong
 GX: Guangxi
 GZ: Guizhou
 JX: Jiangxi
 LN: Liaoning
 SD: Shandong
 SC: Sichuan
 SX: Shanxi
 SN: Shaanxi
 CQ: Chongqing
 HB: Hubei
 HN: Hunan
 HA: Henan

The 25 largest Chinese ceramic manufacturing groups **account for 49% of the total national production capacity**. They are **mainly headquartered in Guangdong** (only 1 of them are based outside Guangdong), but many of the groups also have plants in other regions.

*The largest groups manufacturing ceramic tiles and slabs

Top 25 groups headquarters location

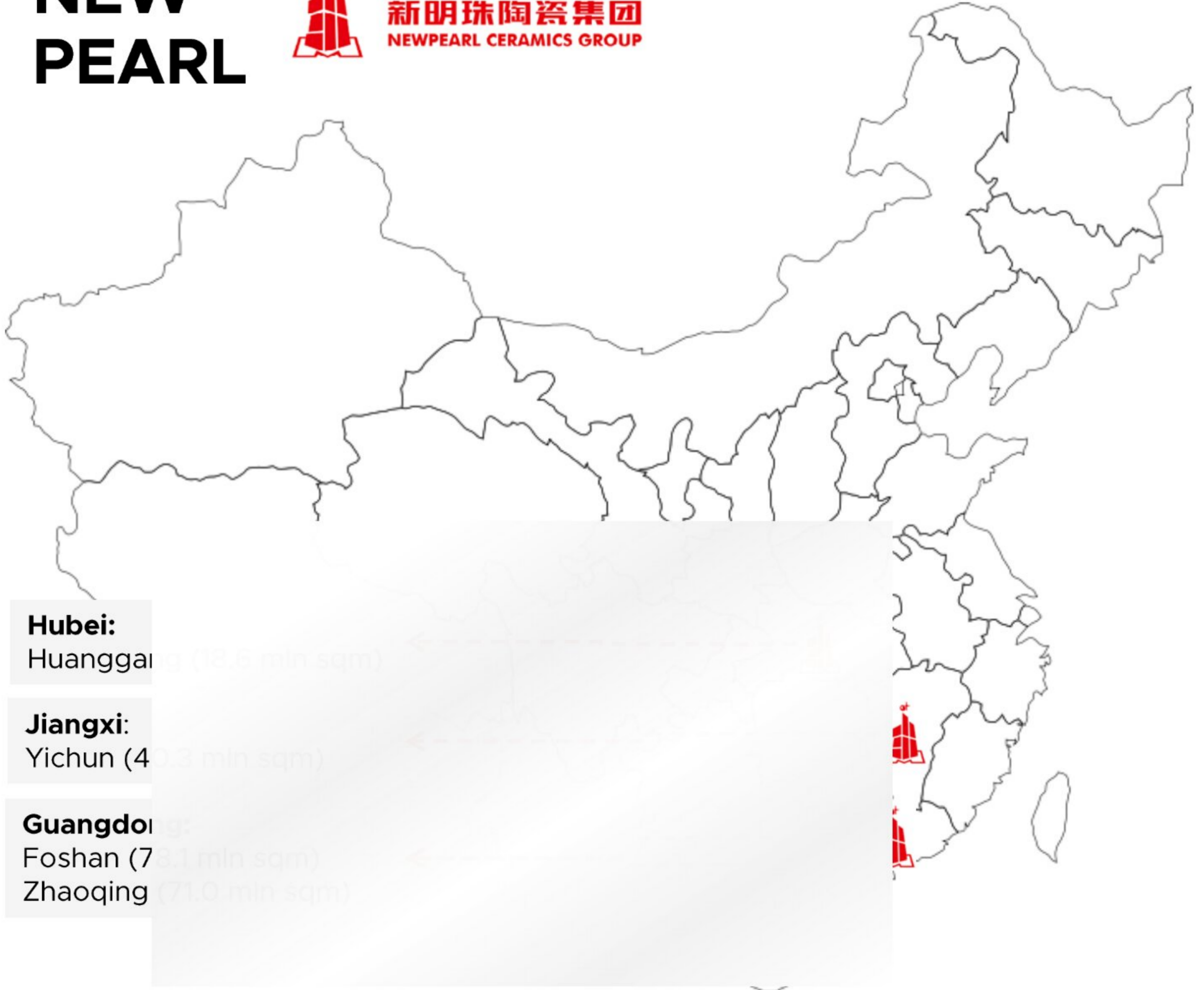


MAIN GROUPS

NEW PEARL



新明珠陶瓷集团
NEWPEARL CERAMICS GROUP



Hubei:

Huanggang (18.6 mln sqm)

Jiangxi:

Yichun (20.3 mln sqm)

Guangdong:

Foshan (73.1 mln sqm)

Zhaoqing (71.0 mln sqm)

- Number of factories: 4 factories
- Installed lines: 4 lines
- Yearly capacity = 208.0 mln sqm

Line detail:

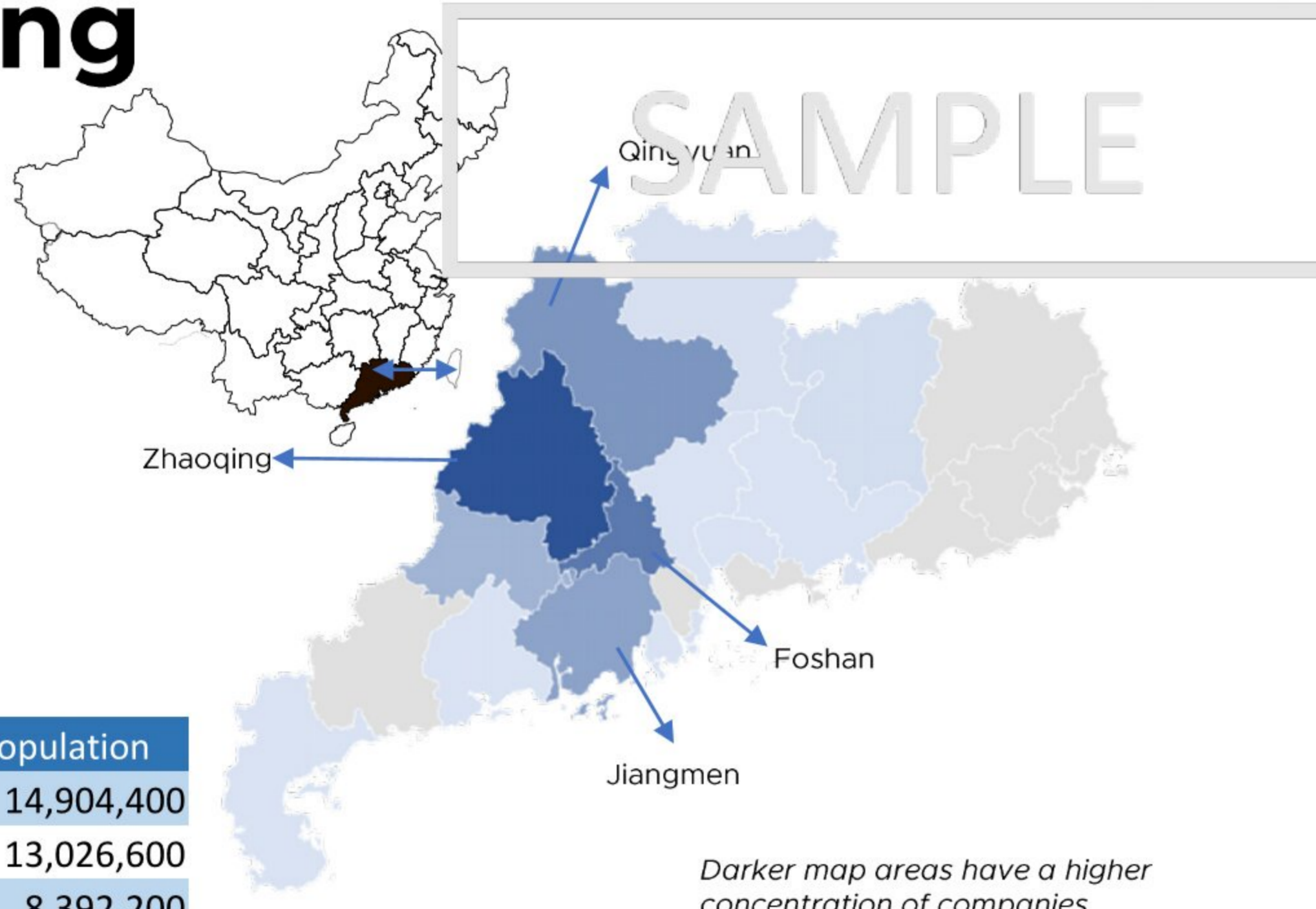
- 1 glazed: 8 Zhaoqing (34.1 mln sqm), 3 Hubei (18.6 mln sqm)
- 1 polished: 6 Zhaoqing (25.7 mln sqm), 5 Yichun (20.3 mln sqm)
- 8 indoor wall: 6 Foshan (46.5 mln sqm), 2 Yichun (16.6 mln sqm)
- 7 slab: 5 Zhaoqing (11.2 mln sqm), 2 Foshan (14.8 mln sqm)
- 6 outdoor wall: 6 Foshan (24.8 mln sqm)
- 1 rustic: 1 Foshan (3.7 mln sqm)



Brands:




1. Guangdong



General info	
Area	179,800 km ²
Population (2019)	115,210,000
Density	622/km ²
GDP (2019)	CN¥ 10.77 trillion US\$ 1.66 trillion

Biggest cities	Area in km ²	Population
Guangzhou	7,247	14,904,400
Shenzhen	1,992	13,026,600
Dongguan	2,460	8,392,200
Foshan	3,798	7,905,700
Zhanjiang	13,260	7,332,000
Maoming	11,426	6,313,200
Jieyang	5,265	6,089,400
Shantou	2,180	5,638,500

Main ceramic production areas	Tile daily capacity	Slab daily capacity	Roof tiles capacity	Companies
Zhaoqing	2,571,500	373,000	270,000	3
Foshan	2,092,500	161,000	225,000	3
Qingyuan	1,830,000	152,000	50,000	3
Jiangmen	1,461,700	63,500		4

 **Ceramic companies**

Guangdong has 174 active ceramic manufacturing companies, most of which operate in the districts of Zhaoqing, Foshan and Qingyuan, 642 tile production lines with a total capacity of 2.9 billion square meters per year, 15 slab production lines with a capacity of 1.5 million pieces per year, and 15 roof tile lines with a capacity of 1.5 million pieces per year.

 **Tile**

9,400
2,902
Prod

 **Slab**

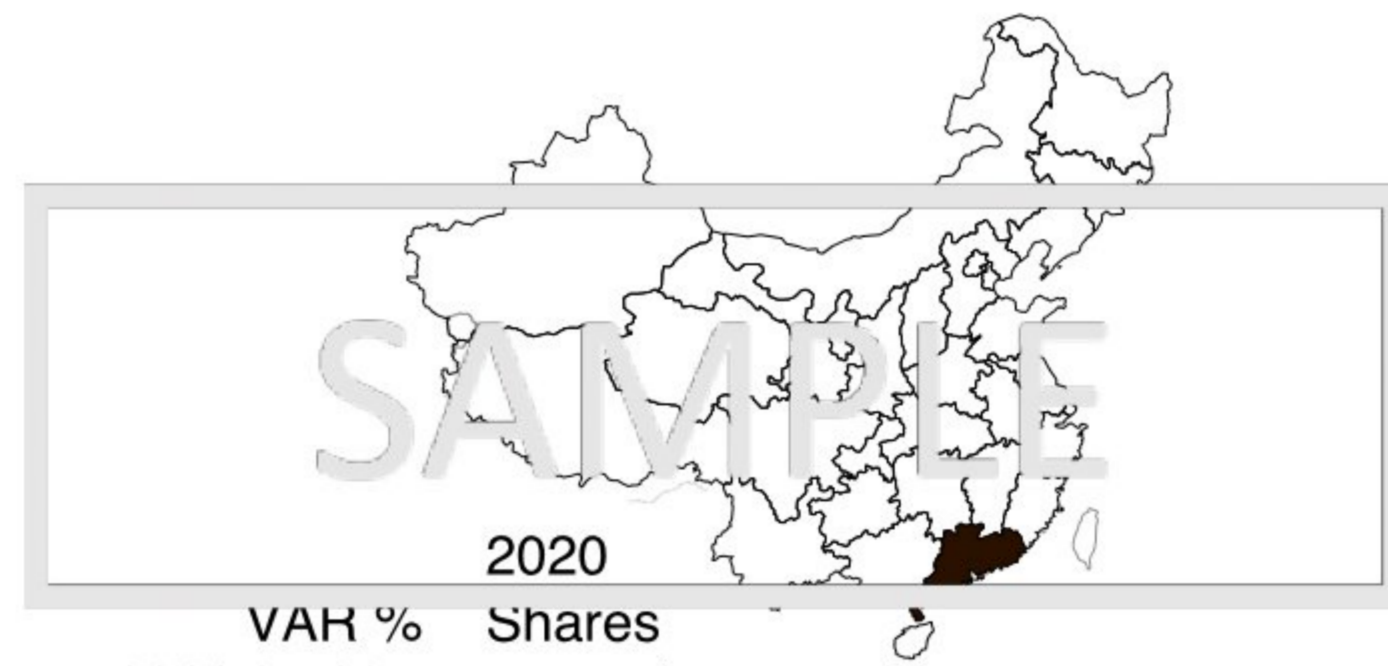
15
1.5
Prod

 **Roof tile**

15
1.5
Prod

Guangdong

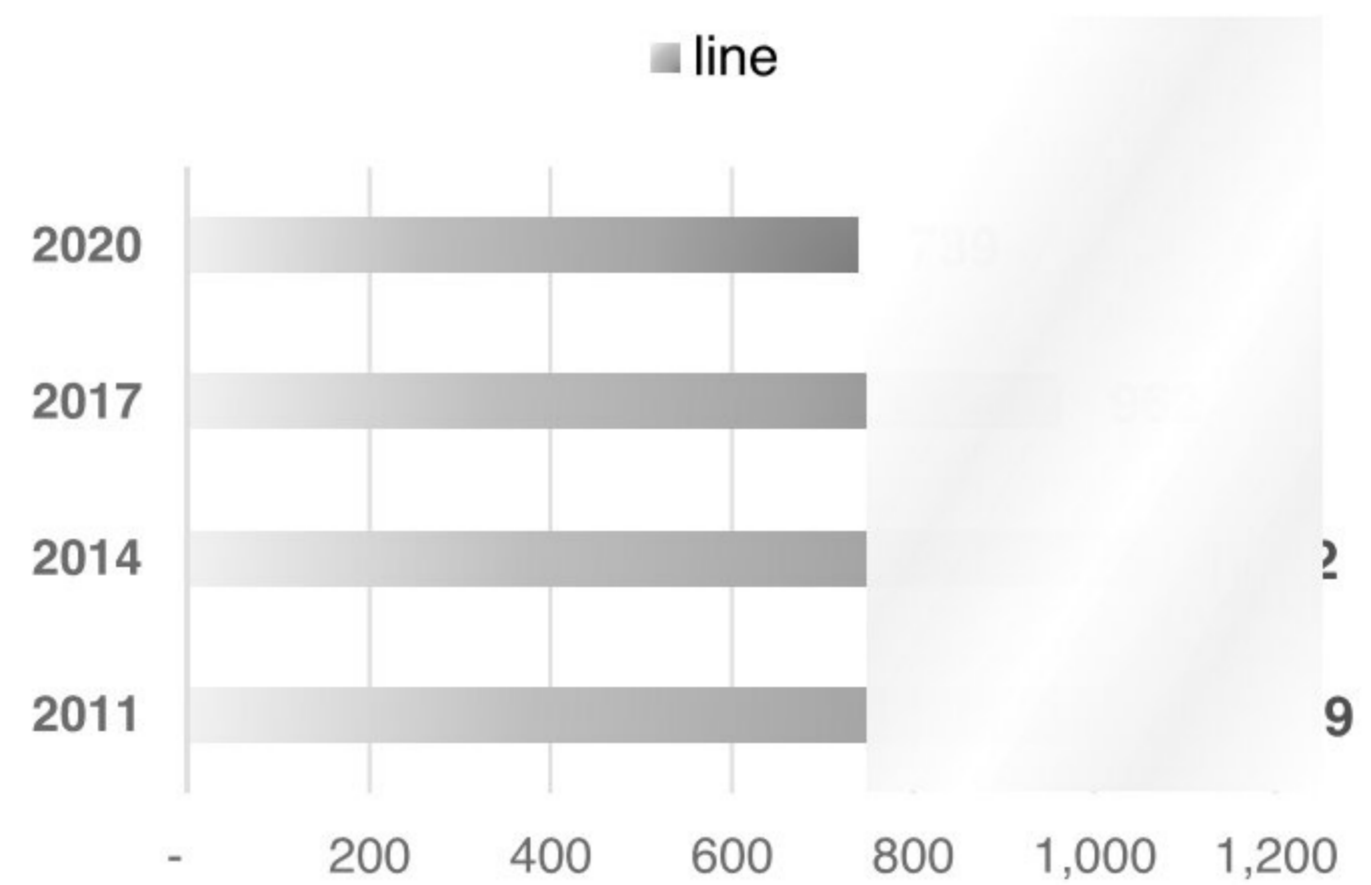
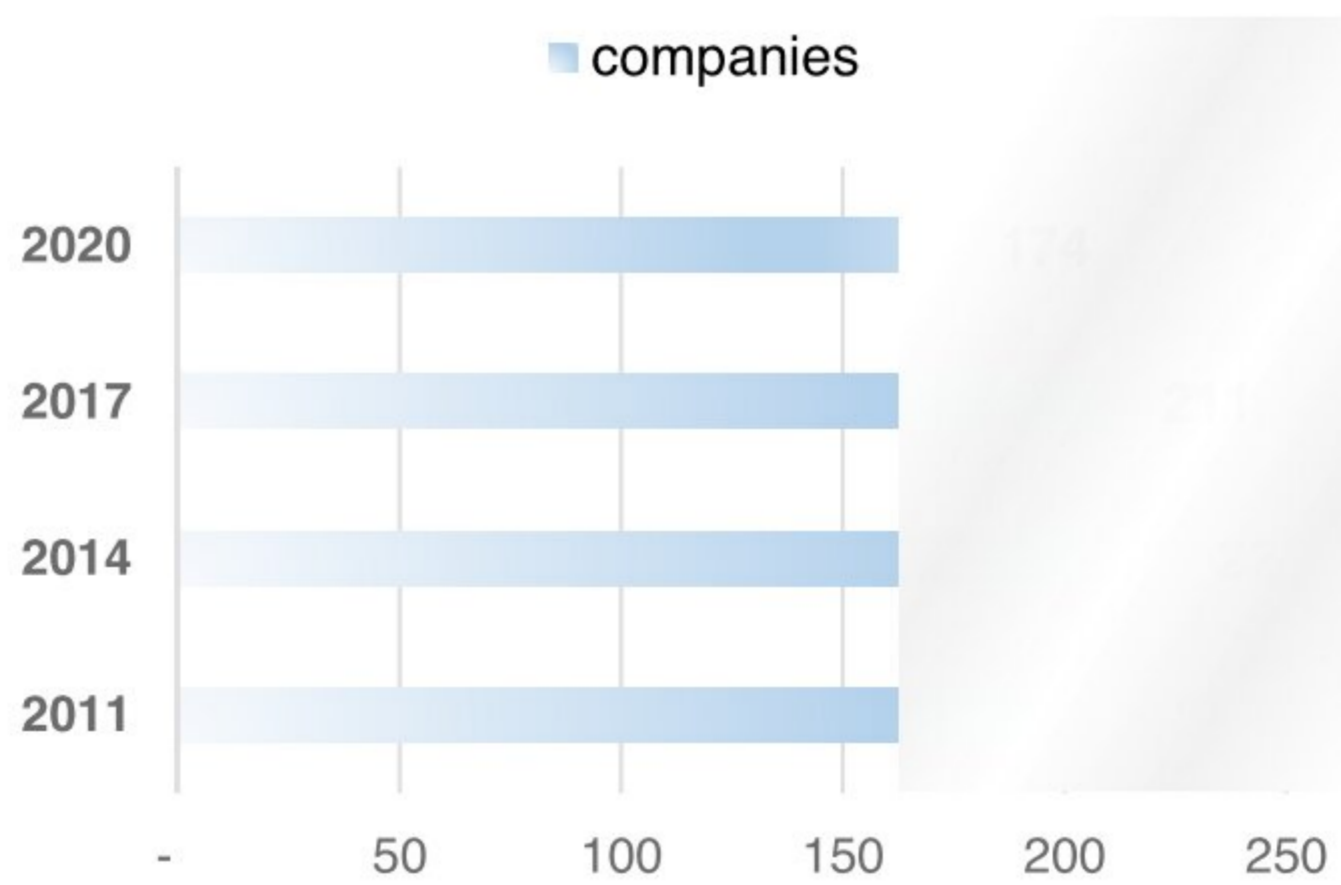
Main indicators 2011-2020



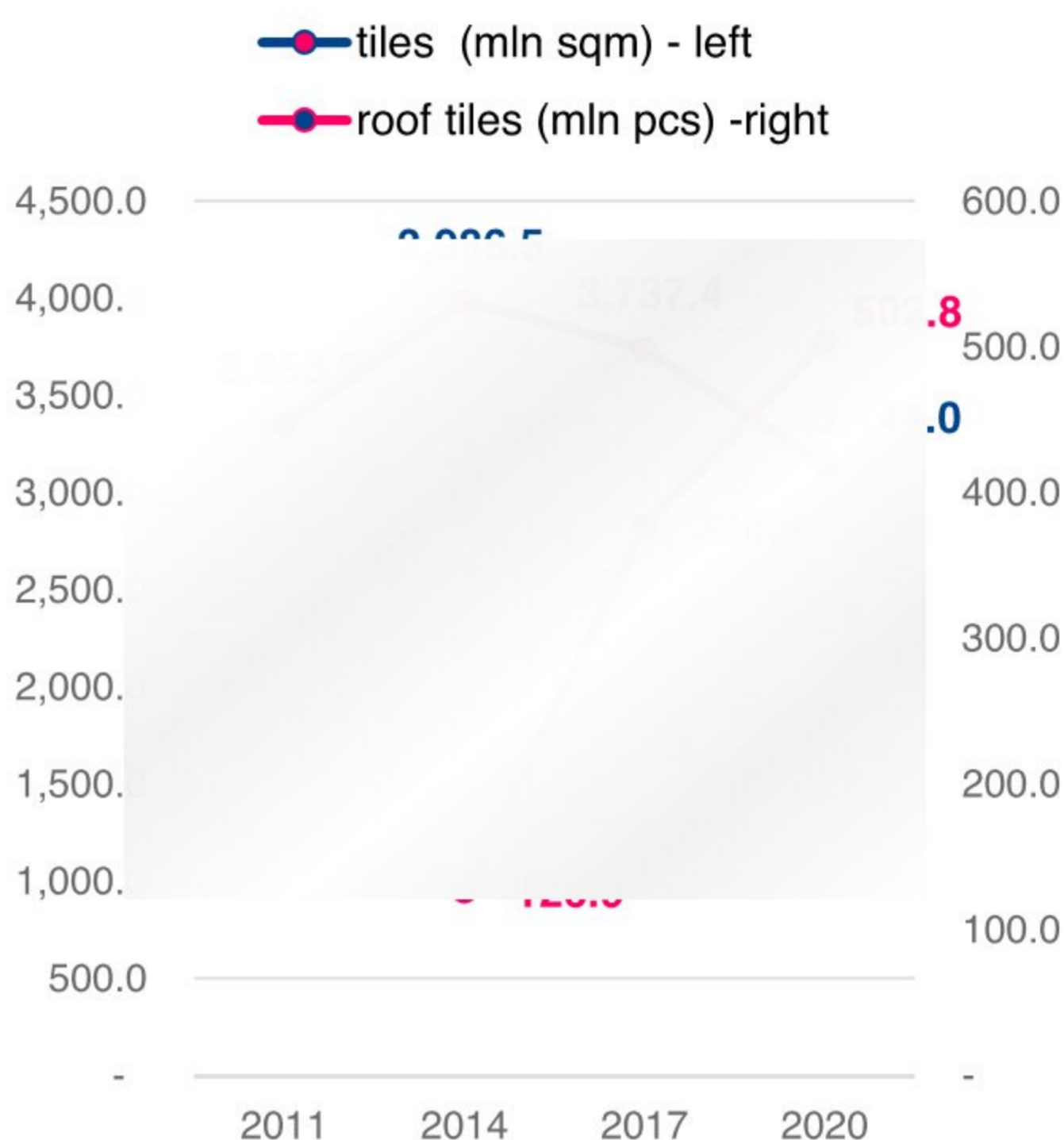
	2011	2014	2017	2020	VAH % 2020 17-20	Shares on total
No. companies	214	223	211	174	-17.5%	1.0%
No. lines	1079	1082	962	739	-23.2%	2.9%
Tile capacity/year (mln sqm)	3,353.9	3,986.5	3,737.4	3,141.0	-15.9%	16.6%
Roof tile capacity/ year (mln pcs)	-	126.9	157	503.3	319.0%	0.1%



Number of companies and production lines 2011-2020



Tile + Roof Tiles yearly production capacity 2011-2020



Guangdong lost 37 operating companies in the last three years (from 211 to 174), and the number of production lines also decreased (23 less than 2017). With a tile production capacity of 3.1 billion sqm (-15.9% with respect to 2017), Guangdong accounts for 26.6% of national production. Its share of roof tile production is much smaller at 503.3 million pcs (-68.2% or 2017), corresponding to 0.1% of national total.

Guangdong



GUANGDONG	Lines	Capacity mln sqm	Capacity/lines mln sqm	%Shares
Glazed tiles	227	1,112.75	4.90	35.4%
Polished tiles	117	564.51	4.82	18.0%
Rustic tiles	137	490.58	3.58	15.6%
Indoor Wall tiles	55	430.75	7.83	13.7%
Slab	82	241.65	2.95	7.7%
Outdoor Wall tiles	65	173.14	2.66	5.5%
Thin tiles	14	90.52	6.47	3.9%
Outdoor Floor tiles	14	21.22	1.52	7.7%
Special tiles	13	18.91	1.45	3.6%
Total tiles (including slabs)	724	3,144.00		100%
Roof tiles pcs	10	33,000	3,300	

Guangdong is specialized in the production of ceramic tiles. Over 98% of its production lines are devoted to tile production and only 2% to roof tiles.

Ceramic tiles are produced by 724 lines, which are mainly devoted to the production of four types of products: **glazed tiles**, which account for more than one third of the regional capacity with 1.1 billion sqm, polished tiles (35% of the total, 564.5 million sqm), **rustic tiles** (15.6% of the total, 490.5 million sqm), and indoor wall tiles (13.7% of the total, 430.7 million sqm).

Guangdong has 82 active slab manufacturing lines with an annual capacity of 241.6 million sqm, the highest capacity anywhere in the country.

Guangdong has a large number of relatively small production lines. The regional average of 4.3 million sqm per line is lower than the national average of 5.1, except for indoor wall production lines which have an average capacity of 7.8 million sqm per line, with their 33.6% share. Slab lines, with their 3.3 million sqm average of 42 million sqm per line,

Guangdong



Main manufacturing groups

Group	City	No. companies	Tile lines	Tiles capacity/year
NEW PEARL group	Foshan	2	34	110.1
HONGYU group	Qingyuan	4	46	137.3
HAOSHENG	Qingyuan	3	17	107.6
NEW JINCHENG group	Zhaoqing	3	15	82.0
GOBOLO	Jiangmen	1	7	77.5
ZHONGSHENG	Foshan	3	15	75.3
QUANYE	Zhaoqing	3	7	67.9
WONDERFUL group	Qingyuan	2	23	70.4
QUANSHENG	Jiangmen	2	12	67.7
SHIJINCHENG	Foshan	2	15	63.9
OLYIA	Qingyuan	2	13	63.7
XINSHUNJING	Yunfu	1	8	57.8
XINRUNCHENG	Foshan	2	11	57.6
GUOSHI ENTERPRISE	Zhaoqing	2	10	57.6
MONALISA group	Foshan	2	11	57.1
HUIYUAN	Yunfu	1	5	55.5
WHITE RABBIT	Zhuhai	1	5	54.0
CHUNYI	Zhaoqing	1	5	53.4
DONGPENG group	Qingyuan	1	5	52.8
NEIJIANG QIANGHU group	Foshan	1	5	51.8



Top tile manufacturers	City	Lines	Yearly capacity mln sqm
Foshan Sanshui Xinmingzhu Jiantao Industrial Co., Ltd. (New Pearl)	Foshan	15	83.1
Enping Baiqiang Ceramics Co., Ltd. (Gobolo)	Jiangmen	7	77.5
Guangdong Summit Ceramics Co., Ltd. (New Pearl)	Zhaoqing	15	71.0
Guangdong Winto Ceramics Co., Ltd. (Hongyu)	Qingyuan	23	63.9
Guangdong Haosheng Ceramics Co., Ltd. (Haosheng)	Qingyuan	17	63.7

How to read the company sheets


佛山市高明贝斯特陶瓷有限公司

Foshan Gaoming Beisite Ceramics Co., Ltd.


Region : GUANGDONG
 City : Foshan Gaoming
 Mail: shunchengjt@163.com
 WEBSITE : www.fsbttc.com
 PHONE : 0757-88831112

	LINES	PROD. CAPACITY (per year)
SLABS 	2	3.1 Mln sqm
TILES 	10	31.0 Mln sqm
TILE LINES DETAILS RUSTIC TILES GLAZED TILES POLISHED TILES	1	3.1 Mln sqm
	8	24.8 Mln sqm
	1	3.1 Mln sqm

INDUSTRIAL GROUP SHUNCHENG

 顺成陶瓷集团 SHUNCHENG GROUP

COMPANY LOGO OR PRODUCT BRAND



 百特陶瓷 BAITE CERAMICS
传承百年贵族

REGION

Foundation: 2000



Employees 1900

Turnover: 37.563

Main Destinations:
 EXPORT
 NATIONAL

USCC: 91440608728 X3

GROUP NAME / GROUP BRAND

INVESTMENT:
 • UNDER CONSTRUCTION 
 • PLANNED 

UNIFIED SOCIAL CREDIT IDENTIFIER/ BUSINESS REGISTRATION NUMBER

DETAILS ON SALES DESTINATIONS : NATIONAL, INTERNATIONAL OR BOTH

LATEST AVAILABLE DATA FROM ORBIS

* ENGLISH COMPANY NAME, OFFICIAL TRANSLATION OR PHONETIC TRANSLATION

