

Kitchenware



April 2009 US\$395



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KITCHENWARE

Supplier capability in China

EXECUTIVE SUMMARY

Kitchenware suppliers in China are taking a number of steps to keep export sales afloat amid the economic slowdown affecting key markets. In fact, some makers anticipate their overseas revenue to increase by up to 10 percent in 2009 despite the crisis.

To stimulate demand, these companies are reducing minimum order requirements and expanding design selections. They are also reaching out to alternative markets such as Asia, South America and the Middle East in hopes of propping up revenue.

In an effort to draw buyer interest further, a growing number of makers are emphasizing aesthetics, mostly in the color and shape choices for cookware, bakeware and kitchen utensils.

Further, many suppliers are planning to raise quotes by up to 10 percent, even though buyers are not receptive to price adjustments especially at this time of global economic recession. They are pointing to the fluctuating cost of raw materials, primarily steel, as the foremost reason behind looming markups.

The following are some of the key trends we see in China's kitchenware industry:

- Many suppliers, especially large companies, will boost capital expenditure by 20 to 50 percent to upgrade capability. Financing will go mainly to enhancing R&D and design capability. Companies will also shorten delivery time and increase staff training.
- Rising prices will be prevalent in coming months to cover for diminishing sales. Suppliers are also looking at export destinations apart from the traditional US and European markets.
- Makers are introducing more cookware and bakeware pieces in novelty shapes and colors to help stimulate sales. Multipurpose units such

as pots and pans designed for storage, cooking and serving are receiving increased attention as well.

- Alternative materials in the kitchen knives line are seen as having potential, as more suppliers release blades in ceramic and zirconia. Stainless steel, however, continues to be the most commonly used material.

This report covers cookware, bakeware, food storage containers, and kitchen utensils and knives – China's major kitchenware segments.

For each product, the report details the latest design trends, materials and surface treatments employed by makers. It also highlights key factors that influence the export price and quality of low-end, midrange and high-end releases. The industry composition and export hubs of each product category are likewise discussed here.

Projections for the next six to 12 months on prices, overseas sales, capacity expansion plans and R&D focus are detailed in the Supplier Survey.

The Industry Overview section stresses the key issues affecting China kitchenware exporters, and their means of coping with these challenges. It also provides information on Guangdong and Zhejiang provinces, the key sourcing centers.

Reflecting the industry structure, nearly 60 percent of makers interviewed for this report are located in Guangdong, while about 30 percent come from Zhejiang.

The majority of these companies are manufacturers with direct export rights.

Further, close to 90 percent of the featured suppliers are mainland China-owned, and the other are publicly listed, and US- and Hong Kong-invested. Many of them have been offering kitchenware and related home products for 10 to 20 years, and are OEM-oriented.

In this report

- 29 in-depth company profiles
- 22 additional suppliers
- 96 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in-person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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Published by Publishers Representatives Limited (on behalf of Trade Media Limited)
4th Floor, Century Yard, Cricket Square, Elgin Avenue, P.O. Box 32322 SMB, George Town, Grand Cayman, Cayman Islands
c/o 22/F Vita Tower, 29 Wong Chuk Hang Road, Aberdeen, Hong Kong
ISBN 978-988-8004-65-2

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INDUSTRY OVERVIEW

The export-oriented kitchenware industry in China is currently facing difficult times, mainly because of the global economic crisis. Fluctuating material costs and domestic competition are also major challenges for suppliers.

Many customers in the US, traditionally the main market, have either reduced or withdrawn their orders.

Small suppliers are particularly affected because of the lack of financial resources, which makes it difficult for them to cover operating expenses during lean periods.

In fact, it is estimated that between 10 and 20 percent of small cookware makers either closed or reduced the scale of their operations in 2008. Currently, the line is composed of about 5,000 suppliers.

Material expenditure is another difficulty faced by China's kitchenware suppliers.

Steel costs have gone through fluctuations in the past year. While outlay increased between 30 and 50 percent in the first part of 2008, reductions of 30 to 40 percent were seen in the second half.

Currently, expenditure for this material is again on an upward trend. This is due mainly to the supply, which shrank considerably as domestic providers slashed their output.

In fact, steel mills in China have been running at 60 to 70 percent capacity for several months as they struggle to balance demand and output.

Significant increases in the cost of steel and food-grade plastic, however, are not expected.

The majority of kitchenware makers consider price competition as another challenge.

Despite this, most small and midsize companies plan to raise quotes in coming months. Such increases, though, will be held to a maximum of 10 percent.

Some suppliers, however, will be

keeping prices at current levels. These are primarily large enterprises that can afford to reduce their margins in order to boost competitiveness.

In response to the numerous industry difficulties, kitchenware makers are taking various steps to maintain competitiveness.

Regardless of company size, the MOQ may be lowered to attract orders. This is in line with the reduced purchasing power of buyers in the main overseas destinations.

In addition, many suppliers will be increasing exports to areas other than the US. The EU, which has traditionally been a solid market, is now expected to receive the bulk of shipments from small makers.

Midsize and large companies, on the other hand, have already begun exploring alternative destinations. Such locations include South America, the Asia-Pacific region and the Middle East. As these areas are typically price-sensitive, most shipments are of low-end models.

Buyers in these destinations have also been negatively affected by the crisis, but not as badly as customers based in the US.

Supplier summary

Suppliers surveyed	29
Export sales	\$158.4mn
Export ratio	76%
OEM business	59%
Capacity utilized	62%
Annual R&D spending	\$3.7mn
Full-time employees	7,472

Data: All surveyed suppliers

Makers are also exerting an effort to boost in-house R&D capacity. They are developing unique designs to differentiate themselves from competitors.

Companies that offer bakeware, for example, are augmenting typical products with versions that come in a range of nontraditional shapes and bright colors.

In light of these steps, kitchenware suppliers in China have a positive outlook for coming months.

Revenue from overseas sales is generally expected to rise by at least 10 percent.

As a result, companies will be increasing their capital expenditure in coming months. This will allow makers to cope with the projected higher demand. Currently, most are

Major customers

Company	
Anhui Light	Gold Prestij (Turkey)
Cleverest Son's Wife	Carrefour (France); Wal-Mart (US)
Foshan City Shunde Daffodil	Wal-Mart, Target, Kmart, Focus (US); Superstore (UK); Mapa (France)
J&J	Kesko (Finland); Arnest (Japan)
Jiangmen City Hong Hua	Wal-Mart, Target (US)
Lin'an Tianmu	Target (US); WMF (Germany)
Qianxing	Oggi (US)
Wuyi Fuhua	Kovea (South Korea)
Yangjiang Hondee	Chef-Mate (UK); Fackelmann (Germany)
Zhejiang Jintuo	MD (Algeria)

Accompany Houseware Co. Ltd

Exporting an average of 35,000 kitchenware pieces each month, Accompany is a Shanghai-based manufacturer with total sales of \$10 million.

Revenue in the line amounted to \$2 million last year, all of which came from overseas shipments. North America, the EU, Eastern Europe, the Asia-Pacific region and the Middle East were the main destinations.

With \$500,000 allotted to product development every year, the company assigns 10 of its 300 workers to conduct design work.

Occupying 20,000sqm, Accompany's factory runs at 58 percent of capacity.

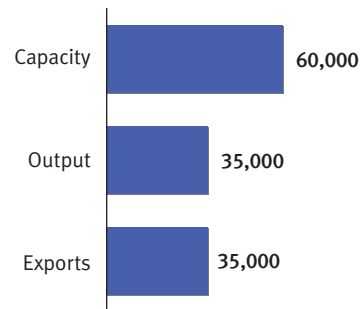
The supplier is holding capital expenditure at current levels. It is also planning to boost shipments to the Asia-Pacific market.

Prices are projected to rise less than 5 percent in the next six months. In addition, export sales are expected to increase between 10 and 20 percent.

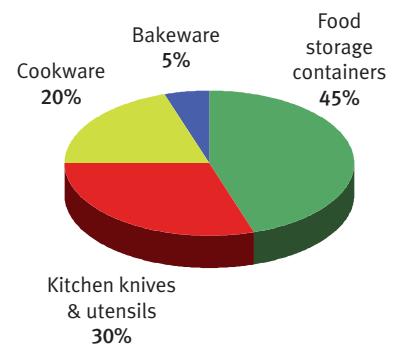
Bakeware, cookware, kitchen knives and utensils, and food storage containers are offered. These together account for 20 percent of total sales.

Profile

Production units/mth



Products made



Contact details

Business contact

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Shanghai, China

Company facts

Year established	1998
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shanghai
Number of factories	1
Factory location(s)	Jinhua (Zhejiang)
Total factory area	20,000sqm
No. of full-time employees	300
No. of R&D/design staff	10
No. of QC staff	20
Annual sales (all products)	\$10.0mn
Annual R&D spending	\$500,000
ISO certification	No

Sales & output: Kitchenware

Annual sales	\$2.0mn
Share of total sales	20%
Annual export sales	\$2.0mn
Total monthly capacity	60,000 pieces
Average monthly output	35,000 pieces
Capacity utilized	58%
Average monthly exports	35,000 pieces
Export ratio	100%
OEM % of exports	—
ODM % of exports	100%
OBM % of exports	—
Other products made	Aluminum and plastic water bottles, coffee pots, hip flasks, lunch boxes, plastic cups, bathroom sets, ceramic, glass and stainless steel mugs

Capability

Production checklist

In-house surface treatment	Yes
Makes molds in-house	Yes
Bending & punching machines	7
Brazing machines	2
Plastic-injection machines	23
Polishing machines	4
Powder-coating lines	1
Licensed user of nonstick coating	Yes

Exports by product

Bakeware	5%
Cookware	20%
Kitchen knives & utensils	30%
Food storage containers	45%

Exports by market

North America	20%
European Union	20%
Europe (non-EU)	10%
Asia-Pacific	40%
Middle East	10%
Other	—

Outlook

- **Export prices**
Increase
- **Export price increase**
Less than 5%
- **Export sales**
Increase 10-20%
- **Target market**
Asia-Pacific
- **Capital expenditure**
No increase
- **Major challenge**
Stricter overseas standards
- **Export capability**
Widen product range

Popular export models



Description: Set of one rectangular and two round containers with lunch bag; airtight lids; PP; stackable; 190, 420 and 490mL

Food storage containers

Model	BXT-04
Minimum order	3,000 sets
Packaging type	White box
Delivery time	30 days
Indicated price	•



Description: Set of three round and five rectangular containers with airtight lids; PP; stackable; two 190 and two 660, 750, 1,100, 1,400 and 3,400mL

Food storage containers

Model	BXT-08
Minimum order	3,000 sets
Packaging type	White box
Delivery time	30 days
Indicated price	•



Description: Set of one round and three rectangular containers with airtight lids; PP; stackable; 660, two 750 and 3,200mL

Food storage containers

Model	BXT-07
Minimum order	3,000 sets
Packaging type	White box
Delivery time	30 days
Indicated price	•

• Information not disclosed

PRODUCT GALLERY

Kitchen knives & utensils



Cleverest Son's Wife
(profile page 36)
Model: KA030-A8
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 45 days
Indicated price: \$23.80
Description: 7-piece kitchen knife set; 203.2x2.5mm chef's, 203.2x2.2mm bread, 203.2x2.2mm trimming, 127x2mm utility and 101.6x2mm paring knives, 203.2mm sharpener, 203.2mm scissors with PP handle; 3Cr13 stainless steel blades; 18/0 stainless steel and black ABS handles



Cleverest Son's Wife
(profile page 36)
Model: CK-01-A4
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 30 days
Indicated price: \$28.50
Description: 3-piece kitchen knife set; 152.4x1.8mm chef's, 127x1.5mm utility and 76.2x1.5mm paring knives; acrylic block; TPR-coated ABS handles; ZrO₂ blades; 87HRC



Cleverest Son's Wife
(profile page 36)
Model: CK-02-A4
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 30 days
Indicated price: \$28.50
Description: Kitchen knife set; 152.4x1.8mm chef's, 127x1.5mm utility and 76.2x1.5mm paring knives; acrylic block; TPR-coated ABS handles; ZrO₂ blades



Cleverest Son's Wife
(profile page 36)
Model: KA001-S6
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 45 days
Indicated price: \$16.80
Description: 5-piece kitchen knife set; 203.2x2.5mm chef's, 203.2x2.2mm bread, 203.2x2.2mm trimming, 127x2mm utility and 101.6x2mm paring knives; 202 stainless steel block; 18/8 stainless steel bolsters; 3Cr13 stainless steel blades; matte finish; 52-54HRC



Cleverest Son's Wife
(profile page 36)
Model: KA016R-A8
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 45 days
Indicated price: \$24.50
Description: 7-piece kitchen knife set; 203.2x2.5mm chef's, 203.2x2.2mm bread, 203.2x2.2 trimming, 127x2mm utility and 101.6x2mm paring knives, 203.2mm sharpener, 152.4mm stainless steel scissors; mirror-finished 18/0 stainless steel and red ABS handles; grind-finished



Cleverest Son's Wife
(profile page 36)
Model: KA026-A8
Minimum order: 1,000 sets
Packaging type: Colored box
Delivery time: 45 days
Indicated price: \$18.50
Description: 7-piece kitchen knife set; 203.2x2.5mm chef's, 203.2x2.2mm bread, 203.2x2.2 trimming, 127x2mm utility and 101.6x2mm paring knives, 203.2mm sharpener, 152.4mm stainless steel scissors; mirror-finished 18/0 stainless steel and black ABS handles; grind-finished