

Plumbing & Sanitaryware



Essential sourcing intelligence for buyers

China manufacturer profiles

Detailed profiles of 19 suppliers with verified manufacturing and export credentials

Product & price trends

Prices and specifications of 62 top-selling export products

Supply centers & market trends

Coverage of leading and emerging supply centers, plus insight into capacity, output and R&D

July 2009

US\$395

global sources

Choose verified suppliers



Online • Trade shows
Magazines • Research

www.globalsources.com

www.ChinaSourcingReports.com

PLUMBING & SANITARYWARE

Supplier capability in China

EXECUTIVE SUMMARY

China's plumbing and sanitaryware is optimistic of prospects for the rest of 2009 and early next year. Despite export sales between January and April declining more than 10 percent year on year, suppliers are generally confident that revenue will rebound in the months ahead. Some are even expecting growth to exceed 20 percent.

Export sales in the past few months dipped mainly as a result of weak demand and low prices. Most companies cut quotes in a bid to attract more clients as orders started to fall in latter half of 2008 due to the financial crisis that affected the US and other key markets.

Positive projections in coming months are buoyed primarily by expectations of economic recovery. Further, makers are actively boosting revenue by releasing high-value products for a better sales mix.

The following are some of the key trends we see in China's plumbing and sanitaryware industry in line with efforts to enhance competitiveness and increase revenue:

- R&D at many companies is being geared toward more visually appealing and durable designs. As part of this, sets consisting of matching basins, toilets, urinals, tubs and other types of sanitaryware are expected to be released.

- Water-saving features and constructions will come to the fore as well. These will be seen mainly in products targeting developed economies such as the US and the EU, where consciousness about water conservation and other environmental issues is strong.

- A number of enterprises will also launch models that enhance user safety. Such designs will target primarily the geriatric and handicapped segments, which are considered markets with high growth potential.

- In terms of pricing, most companies intend to hold off upward adjustments for existing products. Those planning to raise quotes will limit increases to less than 5 percent.

- To minimize expenses, manufacturers will be improving production efficiency in coming months. Several are also expanding into related lines instead of specializing in only one or two categories to achieve greater economies of scale.

- The Asia-Pacific region, the EU and North America will continue to be the main destinations of China-made plumbing and sanitaryware. Shipments to these markets currently account for more than 70 percent of export sales.

The scope of this report includes sinks and basins, faucets, sanitaryware such as toilets and tubs, bathroom fixtures and plumbing supplies.

Each product category has its own section that provides details on the common features and price determinants of major product lines. The latest trends in terms of design and materials are also discussed.

A description of the supplier base can be found in each segment. Key characteristics of small, midsize and large suppliers are highlighted.

The Industry Overview illustrates the effects of the global economic slowdown on the industry. It also identifies the strategies that are being employed at most companies to stimulate demand and boost revenue.

To reflect the industry structure, more than 60 percent of the suppliers interviewed for this report are based in Guangdong and Zhejiang provinces, which account for more than half of China's exports of plumbing and sanitaryware. In 2008, shipments from the two hubs reached nearly \$7 billion.

In this report

- 19 in-depth company profiles
- 62 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 in-depth company profiles, 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 capability of each supplier.

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

CONTENTS

INDUSTRY OVERVIEW	7
Supplier summary	
Export statistics	
Major customers	
Main production centers	
Supplier demographics	
Sinks & basins	10
Faucets	13
Sanitaryware	15
Bathroom fixtures	18
Plumbing supplies	21
Supplier survey	24
Export prices, export sales, major challenges, target markets, capital expenditure, product trends, efficiency, capability	
SUPPLIER PROFILES	27
Supplier locations	
Industry composition	
Exporter ranking	
Supplier matrix	
Production checklist	
Supplier profiles	
PRODUCT GALLERY	75
Top-selling export products	

Copyright 2009 Trade Media Limited. All rights reserved. Reproduction in whole or in part in any form or medium without express written permission of Trade Media Holdings Limited and Trade Media Limited is prohibited.

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 978-988-8004-89-8

Disclaimer: Any recommendation contained in this report may not be suitable for all investors or businesses. Moreover, although the information contained in this report is obtained from sources believed to be reasonably reliable, the accuracy or completeness of such information cannot be guaranteed. The author and the publisher of this report (and the publisher's affiliates, agents, sales representatives and service contractors) do not make any representation or warranty whatsoever (whether express or implied) in relation to any of the contents of this report (including any information, opinion, recommendation or conclusion contained in this report) (collectively, "Contents"), whether as to the accuracy, completeness, quality, fitness, suitability or reliability of such Contents (or any portion thereof) or otherwise, and shall not be liable under any circumstances whatsoever for any error, omission, defect or deficiency in, or for any use of or reliance on, such Contents (or any portion thereof).

All product images are provided by the companies interviewed and are for reference purposes only. Those product images featuring products with trademarks, brand names or logos are not intended for sale. Products that are not the specific topics of editorial articles are shown for illustrative and/or demonstrative purposes only. We, our affiliates, and our affiliates' respective directors, officers, employees, representatives, agents or contractors, do not accept and will not have any responsibility or liability for product images (or any part thereof) which infringe on any intellectual property or other rights of a third party.

INDUSTRY OVERVIEW

China's plumbing and sanitaryware industry is optimistic that business will rebound in the months ahead. Besides projections of economic recovery, revenue is expected to rise as suppliers stimulate external demand by moving up the value chain and improving their product mix.

At many companies, a slowdown in exports was noted down during the latter half of 2008. Makers of kitchen faucets, for instance, estimated that the shipment volume during the period was 10 percent fewer than the total figure for the first half of the year.

Customs statistics show that for 2008, even as overseas sales remained on a growth track, the rate of increase decelerated to 15 percent from 66 percent the year before. In terms of volume, the total slowdown is difficult to estimate since data for some categories are recorded in pieces, while others are in kilograms.

Shipments of plumbing supplies, which are documented in kilograms, increased by 2 percent to 1.1 billion. Even so, the economic downturn did not leave the industry unscathed, as growth decelerated by 70 percentage points.

For faucets, which are recorded in pieces, the slump reached more than 10 percent. Exports of the line in 2008 fell to 654 million pieces from nearly 738 million in 2007.

Early 2009 saw overseas sales slip off the growth track. With suppliers reining in quotes to attract more orders and counter the downturn in shipment volume, revenue between January and April dropped 13 percent year on year to \$3.4 billion.

Exports of pipes, fittings, tubes and other plumbing supplies during the period plunged 33 percent to below 260 million kilograms. At a little over \$683 million, total sales were down 40 percent as average export value also fell by 10 percent.

Faucet exports, which amounted to

nearly \$606 million, posted a year-on-year decline of 21 percent, with export volume and per-unit value down 20 and 1 percent, respectively.

In bathroom fixtures, export sales fell 10 percent to \$425 million, even as per-unit value rose 3 percent to \$2.97 per unit or kilogram.

The sanitaryware line saw revenue climb a marginal 3 percent, exceeding \$1 billion, primarily as a result of higher per-unit value. The average revenue from each kilogram and unit exported rose 13 percent to \$0.50.

Sinks and basins were the only products that bucked the trend for lower sales. Overseas revenue from the line for the first four months of 2009 grew 21 percent to over \$656 million, even as average export value declined 70 percent to \$2.56 per unit or kilogram.

In coming months, more than 70 percent of suppliers surveyed for this report are confident that export sales will increase. Some are even anticipating that growth will exceed 20 percent.

Upbeat projections are driven mainly by the fact that a number of business opportunities opened up in recent years and have yet to be fully tapped.

One of these is the thriving market for environment-friendly products, especially amid international regulations and projects encouraging efficient water usage. The US

Supplier summary

Suppliers surveyed	19
Export sales	\$137.4mn
Export ratio	58%
OEM business	40%
Capacity utilized	58%
Annual R&D spending	\$13.5mn
Full-time employees	5,513

Data: All surveyed suppliers

EPA, for instance, has sponsored a WaterSense labeling program. A similar system, the Water Efficiency Labeling and Standards Scheme, is being adopted in Australia.

To heed demand, suppliers are moving upscale with models that provide 20 to 50 percent water savings. Options include toilets that dispense 3.8, 4 or 4.8L per flush, instead of the standard 6L.

Faucets with aerators and regulators are coming to the fore as well. The former injects air into the water, generating soft and bubbly streams to reduce splashing. Regulators permit users to adjust the amount of water dispensed.

In the urinals segment, waterless alternatives are emerging. Such designs do not require flush valves to operate. Instead, they are fitted with replaceable cartridges that contain a liquid sealant.

Even bathtub manufacturers are jumping on the bandwagon, developing 500 to 700mm-deep models that prevent overflow. Versions featuring a filtration system

Major customers

Company

Anping Nanhai Sanitary	ISM (Russia); VTB, Signature Hardware (US)
Bleujay	Hindware (India)
GL	Global Bath (US)
Horizon	Wal-Mart, Target (US)
Taihe	Home Depot, American Standard (US)
Vico	Vaillant (Germany); Cose (Italy)

Anping Nanhai Sanitary Ware Co. Ltd

Anping Nanhai Sanitary specializes in cast-iron tubs, although bathroom fixtures are also offered. It generates \$20 million in sales annually, all from exports.

Shipments target the US and Europe, with half carrying the in-house Southsea brand.

Designed for the high end, the company's bathtubs are coated with enamel powder from Germany-based Wendel Email.

Production is carried out in two factories with a combined area of 100,000sqm. Running at full capacity,

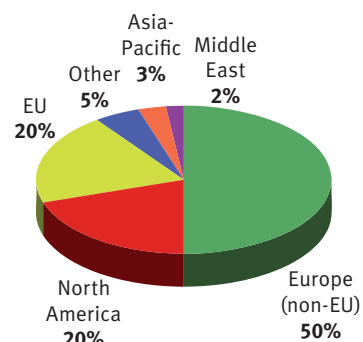
the plants house three tunnel kilns, two cupola furnaces, two foundry lines and one ball mill. The average monthly output totals 8,300 pieces.

Operations are certified to ISO 9001:2000 and 14001 standards. Four technicians, each with more than 15 years of work experience, handle QC.

Up to 10 percent of revenue is allocated for product development. Capable of releasing 10 models each year, a four-member in-house team updates designs based on market trend input from the company's sales offices in the US, Russia and Tunisia.

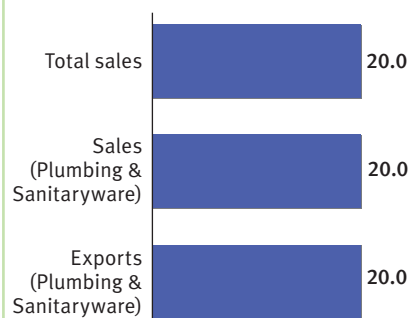
Profile

Export markets



Sales

\$mn/year



Contact details

Business contact

XING Alisa

Phone

(86-318) 706-1761

Fax

(86-318) 756-3383

E-mail

sales@bathtub-china.com
bathtub-china@hotmail.com

URL

www.bathtub-china.com
www.globalsources.com/nanhai.co

Address

Dongbai, Daziwen, Anping,
Hengshui, Hebei, China

Company facts

Year established	1992
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Hengshui (Hebei)
Number of factories	2
Factory location(s)	Hengshui (Hebei)
Total factory area	100,000sqm
No. of full-time employees	220
No. of R&D/design staff	4
No. of QC staff	4
Annual sales (all products)	\$20.0mn
Annual R&D spending	\$2.0mn
ISO certification	Yes

Sales & output: Plumbing & sanitaryware

Annual sales	\$20.0mn
Share of total sales	100%
Annual export sales	\$20.0mn
Total monthly capacity	8,300 pieces
Average monthly output	8,300 pieces
Capacity utilized	100%
Average monthly exports	8,300 pieces
Export ratio	100%
OEM % of exports	15%
ODM % of exports	35%
OEM % of exports	50%
Major customers	ISM (Russia); VTB, Signature Hardware (US)

Capability

Production checklist

Makes molds in-house	Yes
Gravity casting	Yes
Low-pressure casting	No
Tunnel kilns	3
Shuttle kilns	—
Ball mills	1
Metal-punching machines	—
Plastic-injection machines	—
Single/double screw extruders	—
Cold tube mills	—

Exports by product

Sinks & basins	—
Faucets	—
Sanitaryware	95%
Bathroom fixtures	5%
Plumbing supplies	—

Exports by market

North America	20%
European Union	20%
Europe (non-EU)	50%
Asia-Pacific	3%
Middle East	2%
Other	5%

Survey

- **Export prices**
Increased
- **Export price increase**
Less than 5%
- **Export sales**
Increase less than 10%
- **Target market**
Europe (non-EU)
- **Capital expenditure**
Reduce expenditure
- **Major challenge**
Price competition
- **Export capability**
Widen product range
- **R&D focus**
Elegant/fancy designs

Popular export models



Sanitaryware

Model	NH-1001
Minimum order	150 pieces
Packaging type	Wooden pallet
Delivery time	20 days
Indicated price	•

Description: Clawfoot bathtub; cast iron; 301A+ or AA enamel; white; white iron, iron or brass feet; nickel, chrome or black finish for iron feet; 1,700x750x430mm; 140kg



Sanitaryware

Model	NH-1002-1
Minimum order	100 pieces
Packaging type	Wooden pallet
Delivery time	20 days
Indicated price	•

Description: Clawfoot bathtub; cast iron; 301 A+ or AA enamel; white; white iron, iron or brass feet; nickel, chrome or black finish for iron feet; 1,570x785x485x670mm; 133kg



Sanitaryware

Model	NH-1005
Minimum order	100 pieces
Packaging type	Wooden pallet
Delivery time	20 days
Indicated price	•

Description: Clawfoot bathtub; cast iron; 301A+ or AA enamel; white; white iron, iron or brass feet; nickel, chrome or black finish for iron feet; 1,829x785x455x670mm; 180kg

• Information not disclosed

PRODUCT GALLERY

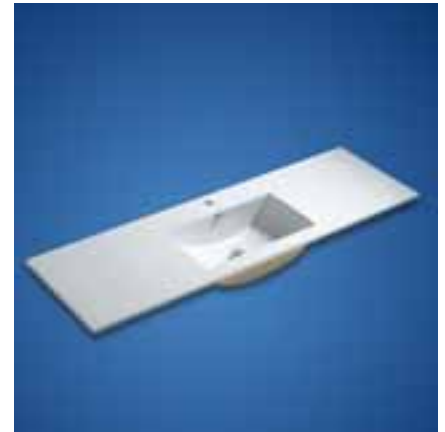
Sinks & basins



Bleujay
(profile page 38)
Model: BJ-922060
Minimum order: 360 pieces
Packaging type: Carton
Delivery time: 40 days
Indicated price: •
Description: Washbasin; ceramic; glazed finish; white or ivory; 600x460x170mm; suitable for mounting on cabinets; part of Ideapad series



Bleujay
(profile page 38)
Model: BJ-922100
Minimum order: 225 pieces
Packaging type: Carton
Delivery time: 40 days
Indicated price: •
Description: Washbasin; ceramic; glazed finish; white or ivory; 1,000x460x170mm; suitable for mounting on cabinets; part of Ideapad series



Bleujay
(profile page 38)
Model: BJ-982150
Minimum order: 200 pieces
Packaging type: Carton
Delivery time: 40 days
Indicated price: •
Description: Washbasin; ceramic; glazed finish; white or ivory; 1,500x460x170mm; suitable for mounting on cabinets; part of Thinkpad series



Foshan City Minjie
(profile page 40)
Model: MJ-B60
Minimum order: 600 pieces
Packaging type: Buyer-specified
Delivery time: 45 days
Indicated price: \$27.00
Description: Washbasin; glazed finish; 46mm tap hole; 36mm faucet hole; 600x480x182mm



Foshan City Minjie
(profile page 40)
Model: MJ-A60
Minimum order: 600 pieces
Packaging type: Buyer-specified
Delivery time: 45 days
Indicated price: \$22.00
Description: Washbasin; glazed finish; 46mm tap hole diameter; 36mm faucet hole; 600x460x210mm; for mounting on cabinets



Foshan Tsobo
(profile page 42)
Model: G608
Minimum order: Negotiable
Packaging type: Foam, brown master carton
Delivery time: 20 days
Indicated price: •
Description: Cabinet sink; 19mm-thick 980x510x165mm tempered glass basin; 450x980x500mm wooden base cabinet; stainless steel hardware

• Information not disclosed

Yes! I'd like to order the full version of the following China Sourcing Reports

For faster service, order online at www.ChinaSourcingReports.com/pdfts

A Please send me

	Report Title:	US\$
1)		
2)		
3)		
4)		
5)		

Total amount US\$

B Please send my reports by

- E-mail (PDF format) Air courier (printed copy)

C My contact details

Mr Mrs Ms _____
Family Name Given Name

Job Title _____

Company Name _____

Address _____

City _____ State/Province _____

Country _____ Postal/Zip Code _____

E-mail _____

Tel _____ Fax _____

Mobile/Cell Phone _____

For faster service, order online at www.ChinaSourcingReports.com/pdfts

For other inquiries

E-mail: service@globalsources.com
 Telephone Hotline: (65) 6547-2800

D My payment method

- US\$ check/bank draft payable to **GLOBAL SOURCES**, drawn on a US bank located in the USA

- Please debit my credit card



Amount (US\$) _____

Card No. _____

Expiry Date _____

Signature _____ Date _____

E Return this form by

Fax North and South America (1-480) 951-4197
 Europe, Africa and Middle East (31-20) 682-7949
 Asia Pacific (65) 6547-2888

Mail Global Sources, c/o Media Data Systems Pte Ltd
 Raffles City PO Box 0199, Singapore 911707

Thank you for your order.