

# Plumbing & Sanitaryware

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Detailed profiles of 29 verified suppliers and contact details of an additional 10 exporters

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Prices and specifications of 150 top-selling export products

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# PLUMBING & SANITARYWARE

## *Supplier capability in China*

### EXECUTIVE SUMMARY

China's plumbing and sanitaryware is optimistic that export sales will revert to precrisis levels within the next 12 months. Demand is expected to strengthen as economic recovery takes a firmer hold in North America and the EU, and development continues in emerging markets.

Customs statistics in the first four months of 2010 support the outlook, with year-on-year growth in the revenue of certain categories exceeding 85 percent.

Exports of faucets and related parts, for instance, rose nearly 90 percent to \$1.5 billion after the sector saw overseas sales for the whole of 2009 fall 16 percent. If business goes at the same rate for the rest of the year, results may even go beyond 2008 earnings.

To accelerate growth, most suppliers have adopted a two-prong strategy aimed at expanding their customer base overseas, as well as domestically. The following are some of the key trends we see in China's plumbing and sanitaryware industry in line with this approach:

- Companies will continue exploring emerging economies for opportunities, even as they fortify their positions in the US and other traditional export destinations. A number of enterprises are especially optimistic about sales in Southeast Asia, with the average tariff for many products down to zero thanks to the China-ASEAN Free Trade Area agreement.

- Under efforts to reach more markets, suppliers will resume their expansion of midrange and high-end selections. Releases for the low end, however, are also anticipated to grow, targeting developing countries.

- Heeding environmental and safety concerns, greater water efficiency and user friendliness will be recurring themes in product development. Across various

categories, makers will adopt LEDs and other electronic technologies to enhance consumer protection and promote health.

- As regards aesthetics, streamlined constructions suitable for various bathroom and kitchen interiors will continue to grow in number. Nonetheless, for higher-value lines, more ornate and novelty designs are anticipated.

- Prices will remain at or near current levels in coming months, as the cost of key manufacturing inputs are expected to remain relatively stable, with fluctuations limited to the 10 percent range.

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

Each category has its own section, which 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 operations are highlighted.

The Industry Overview discusses the key strategies most companies are implementing to take advantage of growth opportunities in various markets. It also provides the sector's outlook on sales, exports and prices, and the factors driving forecasts.

To reflect the industry structure, the bulk of suppliers featured in this report are private, locally owned enterprises.

More than three-fourths of the companies are based in Guangdong and Zhejiang provinces. The two hubs are the primary sources of various plumbing and sanitaryware in China, accounting for more than 50 percent of export revenue in some categories.

### In this report

- 29 in-depth company profiles
- 10 short company profiles
- 150 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 are verified by Global Sources.

Each supplier is confirmed to be authentic with a legally registered business. All companies are visited 3 or more times to ensure they are export-ready and have real offices and products.

The listed contact person has been verified to represent the registered company. In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials.

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.

Suppliers are ranked based on a six-star ranking system. Companies with a higher star ranking provide more business information and verification reports on their Global Sources online homepages.

Suppliers rated 5 or 6 stars have a Credit Check report from First Advantage or Sino-Trust and a Supplier Capability Assessment report provided by Bureau Veritas online.

The rankings are correct at the time of publication and may be subject to change.

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## INDUSTRY OVERVIEW

Encouraged by projections of continued economic recovery, suppliers of plumbing and sanitaryware in China are implementing a range of strategies to boost competitiveness overseas. Forecasts for the remaining months of the year and through early 2011 see exports going back to precrisis levels.

Customs statistics for the first four months of 2010 attest to growing demand, fueling the industry's optimistic outlook.

Revenue from shipments of faucets and related parts, for instance, surged nearly 90 percent year on year to exceed \$1.5 billion. This is in contrast to the whole of 2009, when overseas sales declined 16 percent from the previous year to just over \$3 billion.

The copper pipes and fittings sector posted an increase of 41 percent during the same four-month period, with export earnings amounting \$659.5 million. In 2009, the value of transactions was down 40 percent at \$1.6 billion.

Plastic variants generated nearly \$325 million, 35 percent more than the same timeframe in 2009. Sales from last year's overseas deliveries slid 14 percent from 2008 levels to \$863.5 million.

Sinks and basins experienced a relatively modest year-on-year increase of 17 percent, with \$340 million worth of shipments. The surge was still considerable, however, when compared with the 46 percent slump in 2009.

Exports of toilets and other types of sanitaryware remained on a downturn, but the pace of decline has slowed. Sales from shipments during the first four months of 2010 dipped less than 1 percent from the same period the year before.

### R&D in high gear

To accelerate the rebound in sales, enterprises are probing new outlets even as they are fortifying footholds

in traditional destinations.

Under this strategy, many suppliers are expanding their selections for the upscale segments of the EU and North America. The few companies that have done so have achieved up to 40 percent increases in outbound sales, having found more buyers opting for China's less-expensive midrange and high-end bathroom furnishings.

The two areas rank consistently among the top three destinations for various China-made plumbing and sanitaryware, even through the economic slowdown. This year, based on sales between January and April, the EU is the leading market for faucets and related components, while North America is the primary outlet for sinks and basins.

Lessons from the 2008 financial crisis, however, have left many manufacturers wary of depending on one or two markets for revenue. Consequently, while they are increasing options for the midrange and high end, suppliers also have lower-priced releases for the emerging economies of Asia, Africa, the Middle East and the rest of the Americas in the pipeline.

Sales projections in developing countries are positive, with healthy construction activity expected to fuel demand in coming months.

In Southeast Asia, the China-ASEAN Free Trade Area agreement is projected to further boost business. CAFTA, which came into effect January this year, reduced the tariffs for more than 7,000 goods to zero. The pact is now in force in the six original ASEAN members, namely Brunei, Indonesia, Malaysia, the Philippines, Singapore and Thailand. It will extend to the other four countries in the bloc, Cambodia, Laos, Myanmar and Vietnam, by 2015.

The two-prong strategy is giving rise to a wider selection of plumbing and sanitaryware for different interiors, budgets and lifestyles.

### Supplier summary

Suppliers surveyed	29
Export sales	\$229.5mn
Export ratio	57%
OEM business	48%
Capacity utilized	64%
Annual R&D spending	\$11.7mn
Full-time employees	8,080

Data: All surveyed suppliers

Across the various categories and price points, performance and aesthetics have both gained increased attention.

With regard to performance, greater water efficiency is the primary objective. Upgrades in line with this are prevalent in toilets and related fittings, faucets and showerheads.

In the first category, the latest releases are mostly designs with a flush volume of 6L or less, which is the requirement in the EU, the US and several other markets. Some large enterprises have even introduced models capable of using as little as 3.8 or 4.8L, although the salability of such products is still being tested domestically.

Dual-flush designs are also becoming more common. These typically offer 3 and 6L options for washing down liquid and solid wastes, respectively.

Cistern fittings are following the trend for toilets with partial and full flush modes. Many suppliers are now offering kits that will transform conventional systems into dual-flush types.

In faucets and showerheads, companies are using aerators, sensors and other devices to achieve greater water efficiency. For lavatory taps, in particular, some are targeting the WaterSense specification on residential models, which is a maximum flow rate of 1.5gpm at 60psi and a minimum of 0.8gpm at 20psi.

At the upper end of the price spectrum in the aforementioned

### Chaoan County Guxiang Huada Ceramic Co. Ltd



Founded in 1997, Chaoan County Guxiang Huada is an ISO 9001:2000-compliant maker of sanitaryware and bathroom fixtures. Its selection includes sinks, vanities, bidets, toilets and urinals.

Production takes place at a 30,000sqm factory in Guangdong province. The plant can yield 45,000 pieces monthly.

In 2009, total sales of the company amounted to \$35 million, with \$10 million attributed to exports.

Shipments averaged 10,000 pieces each month. Fifty percent of these

comprised models bearing the in-house KAERQ brand, while the rest consisted of products under OEM and ODM agreements.

Europe, absorbing 70 percent of exports, was the primary destination. The other key markets were the Asia-Pacific region and the Middle East. In coming months, the maker intends to boost exports to the EU.

The company invests about 5 percent of annual sales in R&D and has a six-member team for related tasks. QC procedures are carried out by 12 employees.

#### Company facts

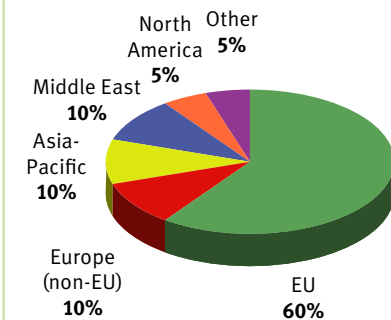
Year established	1997
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Chaozhou (Guangdong)
Number of factories	1
Factory location(s)	Chaozhou (Guangdong)
Total factory area	30,000sqm
No. of full-time employees	125
No. of R&D/design staff	6
No. of QC staff	12
Annual sales (all products)	\$35.0mn
Annual R&D spending	\$1.8mn
ISO certification	Yes

#### Sales & output: Plumbing & sanitaryware

Annual sales	\$35.0mn
Share of total sales	100%
Annual export sales	\$10.0mn
Total monthly capacity	45,000 pieces
Average monthly output	35,000 pieces
Capacity utilized	78%
Average monthly exports	10,000 pieces
Export ratio	29%
OEM % of exports	20%
ODM % of exports	30%
OBM % of exports	50%

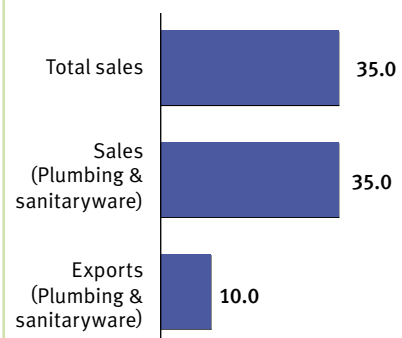
#### Profile

##### Export markets



##### Sales

\$mn/yr



##### Contact details

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### Capability

#### Production checklist

Makes molds in-house	No
Gravity casting	No
Low-pressure casting	No
Tunnel kilns	—
Shuttle kilns	2
Ball mills	—
Metal-punching machines	—
Plastic-injection machines	—
Cold tube mills	—

#### Exports by product

Sinks & basins	10%
Faucets	5%
Sanitaryware	75%
Bathroom fixtures	10%
Plumbing supplies	—

#### Exports by market

North America	5%
European Union	60%
Europe (non-EU)	10%
Asia-Pacific	10%
Middle East	10%
Other	5%

### Survey

- **Export prices**  
Increased
- **Export price increase**  
5-10%
- **Export sales**  
Increase 10-20%
- **Target market**  
European Union
- **Capital expenditure**  
Increase up to 50%
- **Major challenge**  
Price competition
- **Export capability**  
Improve operating efficiency
- **R&D focus**  
Elegant/fancy designs

### Popular export models



#### Sanitaryware

Model	KA-2057
MOQ	200 pieces
Packaging	Export carton
Delivery	25 days
Price	•

**Description:** One-piece toilet; grade A ceramic; glazed finish; S-trap, 300 or 400mm rough-in; siphonic, dual-flush system; with matching soft-close seat cover; 705x385x710mm



#### Sanitaryware

Model	KA-2031
MOQ	200 pieces
Packaging	Export carton
Delivery	20 days
Price	•

**Description:** One-piece toilet; grade A ceramic; glazed finish; S-trap, 300 or 400mm rough-in; siphonic, dual flush system; with matching soft-close seat cover; 745x370x730mm



#### Sink/basin

Model	47
MOQ	100 sets
Packaging	Bubble wrap, foam, carton
Delivery	25 days
Price	•

**Description:** Bathroom vanity; 560x400x180mm ceramic basin, glazed finish; 950x360x480mm cabinet in Thailand-sourced oak, lacquer varnish; 800x16x800mm mirror

• Information not disclosed

## PRODUCT GALLERY

### Sinks & basins



**Chaoan County Guxiang Huada**  
(profile page 36)  
**Model:** 47  
**MOQ:** 100 sets  
**Packaging:** Bubble wrap, foam, carton  
**Delivery:** 25 days  
**Price:** •  
**Description:** Bathroom vanity; 560x400x180mm ceramic basin, glazed finish; 950x360x480mm cabinet in Thailand-sourced oak, lacquer varnish; 800x16x800mm mirror



**Chaoan County Guxiang Huada**  
(profile page 36)  
**Model:** 9090E-Left  
**MOQ:** 400 pieces  
**Packaging:** Bubble wrap, foam, carton  
**Delivery:** 25 days  
**Price:** •  
**Description:** Cabinet sink; grade A ceramic; glazed finish; 900x460x175mm



**Chaoan Jiadebao**  
(profile page 38)  
**Model:** KY612  
**MOQ:** 200 pieces  
**Packaging:** Carton  
**Delivery:** 30 days  
**Price:** \$27.00  
**Description:** Above-counter basin; vitreous china; 480x245x135mm



**Chaoan Jiadebao**  
(profile page 38)  
**Model:** 6  
**MOQ:** 10 sets  
**Packaging:** Carton  
**Delivery:** 30 days  
**Price:** •  
**Description:** Bathroom vanity; 900x460mm basin; oak cabinet, 880x455x500mm; 500x800mm mirror



**Foshan Bleujay**  
(profile page 42)  
**Model:** BJ-927080  
**MOQ:** 360 pieces  
**Packaging:** Export carton  
**Delivery:** 40 days  
**Price:** •  
**Description:** Washbasin; vitreous china; 805x395x170mm; for mounting above cabinets



**Foshan Bleujay**  
(profile page 42)  
**Model:** BJ-926085  
**MOQ:** 360 pieces  
**Packaging:** Export carton  
**Delivery:** 40 days  
**Price:** •  
**Description:** Washbasin; vitreous china; 870x460x160mm; for mounting above cabinets

• Information not disclosed

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