

# Tableware & Cutlery



November 2009 US\$395

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# TABLEWARE & CUTLERY

## Supplier capability in China

### EXECUTIVE SUMMARY

China's tableware and cutlery industry looks forward to higher overseas revenue in 2010 as the economic slowdown eases. Thanks to various cost-cutting measures and revised export strategies, many companies in the country are able to sustain their businesses amid the global financial crunch.

In fact, key categories such as ceramic, porcelain and glass tableware, and flatware all experienced modest YoY sales growth in the first nine months of 2009.

The increased focus on alternative foreign markets, as well as the shift to the midrange, a price segment that has become more popular during the crisis, helped cushion the impact of the recession.

The following are some of the trends we see in China's tableware and cutlery industry:

- More suppliers of tabletop accessories are taking the environment-friendly route to address the rising demand for "green" home products. Examples of these include cork and bamboo placemats, and RoHS-compliant electronic pepper mills.
- Some ceramic and porcelain dinnerware makers switched from high-end to midrange manufacture, in response to the reduced purchasing power of buyers.
- Conversely, a number of melamine dinnerware and flatware suppliers are moving upmarket to give their products better margin potential.
- Companies are highlighting product durability through the use of better materials. A handful of glass tableware makers, for instance, are now releasing models in scratch-resistant tempered glass.
- While the US and the EU are still the primary target markets, exports to emerging destinations such as Southeast Asia, South Africa and the Middle East are increasing.

- Suppliers are either raising their prices by up to 10 percent to have bigger room for profit, or keeping quotes stable to stay competitive.

This report covers glass, ceramic and porcelain, and melamine dinnerware—China's major tableware segments. Tabletop accessories, mainly placemats, condiment sets, and salt and pepper mills and shakers are likewise included.

For each product segment, the report details the latest design trends, materials and surface treatments employed by makers.

It also highlights key factors that influence the price and quality of low-end, midrange and high-end releases. The manufacturing processes, industry composition and export hubs of each product category are likewise discussed here.

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

The Industry Overview section stresses the key issues surrounding China tableware and cutlery exporters, and their means of coping with these challenges.

Reflecting the industry structure, nearly 40 percent of makers interviewed for this report are located in Guangdong, while about 25 percent come from Zhejiang. The majority of these companies are manufacturers with direct export rights. Enterprises from other hubs such as Fujian, Shandong and Shaanxi provinces are also featured.

Further, almost 95 percent of the featured suppliers are mainland China-owned, and the other are foreign- and Hong Kong-invested.

Many of them have been offering tableware and cutlery and related home products for 10 to 20 years, and exporting more than 75 percent of their output.

### In this report

- 32 in-depth company profiles
- 29 additional suppliers
- 125 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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## INDUSTRY OVERVIEW

While most manufacturing and export segments in China continue to feel the impact of the global economic slowdown, the tableware and cutlery sector is among those that are showing concrete signs of recovery. In fact, the majority of the companies interviewed for this report anticipate sales growth of 10 to 20 percent in the next 12 months.

Based on customs statistics, the country's export value of ceramic and porcelain dinnerware, glass tableware and flatware from January to September 2009 posted YoY increases of varying degrees.

Of these, the glass segment exhibited highest growth. During the period, overseas revenue amounted to \$917 million, up 30 percent from the same period last year. Volume rose as well. Shipments reached 696 million kilograms, gaining by 10 percent.

Products covered by these figures include regular and lead crystal glassware used in dining tables and kitchens.

In the ceramic and porcelain segment, sales from January to September 2009 rose by 10 percent YoY to reach \$130 million. Growth, however, is mainly because of higher unit prices. In fact, shipment size dipped 5 percent during the period.

The flatware line shares the same scenario. Overseas revenue topped \$500 million, up 8 percent, while volume dropped by almost 50 percent YoY to 146 million kilograms.

The export performance of plastic dinnerware, on the other hand, suffered in sales and quantity terms. China shipped \$927 million worth in the first three quarters of 2009, down 6 percent. Volume also fell 6 percent YoY, reaching 376 million kilograms.

Helping suppliers cope with the bleak period, the central government in China has raised the tax rebate on some categories. In the ceramics segment, for instance, the rate went up from 11 to 13 percent in April 2009.

Local governments are also giving

monetary incentives to companies that upgrade production facilities or shift to energy-saving manufacturing. These inducements, however, are going mostly to the larger suppliers as they are the ones with greater financial means.

Under efforts to augment sales, an increasing number of makers are paying attention to alternative markets, regardless of product specialization. These locations were also not as severely affected as the EU and the US.

While traditional markets remain the major destination, shipments to Southeast Asia, South Africa, the Middle East are growing.

According to the China Chamber of Commerce for Import and Export of Light Industrial Products and Arts-Crafts or CCLA, the country's ceramic and porcelain shipments from January to June 2009 amounted to \$3.5 billion. Of this, \$792 million were daily-use products, including tableware.

During the period, orders from Southeast Asia, the Middle East and Africa increased, while Western-bound orders declined.

In the first half of 2009, exports of ceramic and porcelain daily-use products to the US were worth \$154 million, down 15 percent YoY.

On the other hand, products bound for the Middle East totaled \$128 million, posting growth of 48 percent.

Similarly, deliveries to Africa were valued at \$67 million, up 60 percent. Exports to the region account for 8 percent of China's total. Products that went to Southeast Asia climbed 25 percent to reach \$13 million.

To compensate for diminished overseas demand further, a number of makers are emphasizing their presence in the domestic arena.

Costwise, however, this approach is not that feasible to small manufacturers with narrow profit margins. Setting up distribution channels in China and competing

### Supplier summary

Suppliers surveyed	32
Export sales	\$117.3mn
Export ratio	51%
OEM business	55%
Capacity utilized	40%
Annual R&D spending	\$9.8mn
Full-time employees	9,136

Data: All surveyed suppliers

with companies that have already established themselves in the local arena necessitate a hefty budget.

But as the local market is already saturated with established nonexporting manufacturers and the overseas business climate is improving, this will only be a temporary strategy.

### More suppliers target midrange

The reduced purchasing power of export markets is urging more China suppliers of ceramic and porcelain dinnerware to move away from high-end manufacturing.

This is particularly the case among midsize and large companies, which traditionally devoted 25 percent of production to expensive designs.

The midrange segment, meanwhile, is becoming stronger. Demand for models at this price point has been growing from July 2008. While the bulk of last year's shipments were \$9 to \$15 per 16-piece set, most exports in the last few months averaged \$7.

Consequently, midsize and large companies are now focusing on the midrange. Previously accounting for half of their total output, this currently makes up 70 percent. Some suppliers still produce high-end versions but only if requested. Compared with upscale releases, midrange designs are as much as 50 percent less expensive. The materials used and the production processes are the major price differentiators.

On the other hand, some glass and melamine tableware, and flatware makers are shifting from midrange

### Best Ceramic Houseware Ltd

Best's tableware and cutlery line accounts for 100 percent of its annual sales totaling \$7 million. The company allots 7 percent of this amount to product development every year.

OEM orders make up 50 percent of exports, while OBM shipments account for 20 percent. The rest are ODM. The manufacturer offers the in-house Best Ceramic brand.

Best is ISO 9001:2000-certified. Its QC team comprises 150 of its 800 full-time employees.

Almost all international shipments are ceramic and porcelain dinnerware.

Flatware and glass dish sets account for the rest.

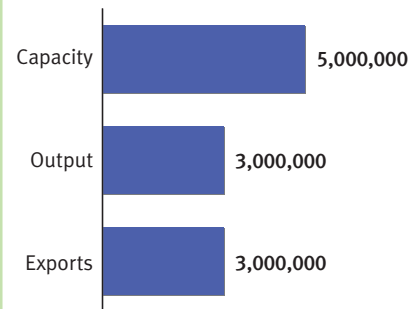
North America, Europe, the Asia-Pacific region and the Middle East are the main export destinations. Aside from these, Best caters to the Africa market.

The EU will be the focus in the next few months. It is the company's biggest market to date, making up 30 percent of total overseas sales.

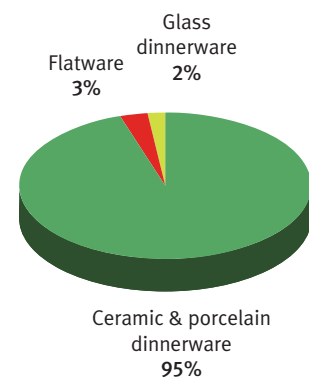
To improve export capability, Best plans to widen its product range. Additionally, R&D focus in the next six months will be on safer materials.

#### Profile

##### Production pieces/mth



##### Products made



#### Contact details

##### Business contact

ZHAO Adrian

##### Phone

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www.globalsources.com/

bestceramic.co

##### Address

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#### Company facts

Year established	1993
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Jiaozuo (Henan)
Number of factories	1
Factory location(s)	Jiaozuo (Henan)
Total factory area	66,000sqm
No. of full-time employees	800
No. of R&D/design staff	35
No. of QC staff	150
Annual sales (all products)	\$7.0mn
Annual R&D spending	\$490,000
ISO certification	Yes

#### Sales & output: Tableware & cutlery

Annual sales	\$7.0mn
Share of total sales	100%
Annual export sales	\$7.0mn
Total monthly capacity	5,000,000 pieces
Average monthly output	3,000,000 pieces
Capacity utilized	60%
Average monthly exports	3,000,000 pieces
Export ratio	100%
OEM % of exports	50%
ODM % of exports	20%
OBM % of exports	30%

### Capability

#### Production checklist

Compression-molding machines	30
Computer-controlled kilns	4
Filter presses	10
Ball mills	4
Polishing machines	—
Stamping machines	6
Grinding machines	3
Furnaces	—
Ingredient analysis in-house	No

#### Exports by product

Glass dinnerware	2%
Glass drinkware	—
Ceramic & porcelain dinnerware	95%
Melamine dinnerware	—
Flatware	3%
Tabletop accessories	—

#### Exports by market

North America	20%
European Union	30%
Europe (non-EU)	20%
Asia-Pacific	10%
Middle East	10%
Other	10%

### Survey

- **Export prices**  
Stayed the same
- **Export sales**  
Increase 10-20%
- **Target market**  
European Union
- **Capital expenditure**  
No increase
- **Major challenge**  
Cost of raw materials
- **Export capability**  
Widen product range
- **R&D focus**  
Safer materials

### Popular export models



**Description:** Porcelain; leaf motif; set of 16

#### Ceramic & porcelain dinnerware

Model	16-piece Dinner Set
MOQ	1,000 sets
Packaging	Colored box
Delivery	30 days
Price	•



**Description:** Lovers' mugs; ceramic; heart-shaped handle; 11oz

#### Ceramic & porcelain drinkware

Model	Love Mugs
MOQ	2,000 sets
Packaging	Colored box
Delivery	30 days
Price	•



**Description:** Ceramic; number of items per set can be customized

#### Ceramic & porcelain dinnerware

Model	Dinner Ware
MOQ	2,000 sets
Packaging	Colored box
Delivery	30 days
Price	•

• Information not disclosed

**PRODUCT GALLERY**

**Ceramic & porcelain tableware**



**Best**  
 (profile page 36)  
**Model:** 16-piece Dinner Set  
**MOQ:** 1,000 sets  
**Packaging:** Colored box  
**Delivery:** 30 days  
**Price:** •  
**Description:** Porcelain; leaf motif; set of 16



**Best**  
 (profile page 36)  
**Model:** Love Mugs  
**MOQ:** 2,000 sets  
**Packaging:** Colored box  
**Delivery:** 30 days  
**Price:** •  
**Description:** Lovers' mugs; ceramic; heart-shaped handle; 11oz



**Best**  
 (profile page 36)  
**Model:** Dinner Ware  
**MOQ:** 2,000 sets  
**Packaging:** Colored box  
**Delivery:** 30 days  
**Price:** •  
**Description:** Ceramic; number of items per set can be customized



**Best**  
 (profile page 36)  
**Model:** 16-piece Stoneware Dinner Set  
**MOQ:** 2,000 sets  
**Packaging:** Colored box  
**Delivery:** 30 days  
**Price:** •  
**Description:** Stoneware; number of items per set can be customized



**Biansebao**  
 (profile page 38)  
**Model:** TCB-Q11  
**MOQ:** 1,000 pieces  
**Packaging:** White box  
**Delivery:** 15 days  
**Price:** \$2.00  
**Description:** Color-changing mug; ceramic; 8.5x9.5cm; 11oz; changes color and shows picture clearly when liquid temperature reaches 45 C; FDA



**Biansebao**  
 (profile page 38)  
**Model:** TCB-BG9  
**MOQ:** 1,000 pieces  
**Packaging:** White box  
**Delivery:** 15 days  
**Price:** \$2.00  
**Description:** Color-changing cup; ceramic; 7x11cm; 9oz; changes color and shows picture clearly when liquid temperature reaches 45 C; FDA

• Information not disclosed

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