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Ceramics



Essential sourcing intelligence for buyers

India manufacturer profiles

Detailed profiles of 14 suppliers with verified manufacturing and export credentials

Product & price trends

Prices and specifications of 72 top-selling export products ranging from vases and figurines to mugs and dinnerware sets

Design & material innovations

Coverage of the latest trends in style and materials

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CERAMICS

Supplier capability in India

EXECUTIVE SUMMARY

Ceramics from India are renowned for their design and artistic qualities. These competitive advantages have helped the country to develop into one of the world's leading supply centers for ceramic products.

The industry is propelled by strong design capability stemming from thousands of skilled artisans who are employed by ceramic manufacturers for their styling expertise.

A stable supply of raw materials also supports the line. Ceramic makers have easy access to key components as India has numerous mines from which several types of clay are extracted.

The industry is highly export-oriented and ships to different foreign markets. The EU is the main overseas destination, with 20 percent of total shipments going to this region. The US is the line's secondary market, taking up about 10 percent of overall export turnover.

Among interviewed suppliers, crafts dominate as the top product category accounting for almost 40 percent of exports. Tableware is the second-largest line as it takes up more than a third of overseas shipments. Pottery is the smallest line, with close to a quarter of featured companies involved in this product segment.

For the most part, India's ceramics industry is composed of small and midsize suppliers owned by local entrepreneurs. Most have been in operation for at least 10 years, with a few having been in business for generations. Traditional manufacturing processes done by hand are still widely in use.

Khurja in Rajasthan state is one of the most important supply zones in the country as it hosts hundreds of ceramic craft and tableware companies. Other major sourcing centers include Jaipur in Rajasthan state, which is notable for a special class of pottery. Delhi and its surrounding environs are also significant hubs for pots and vases.

Export figures for the fiscal year 2008 to 2009 showed a dramatic drop of almost 40 percent due to the global economic crisis. Suppliers are nonetheless expecting better market conditions in the next 12 months as key markets start to recover.

The following are some of the key trends we see in India's ceramic industry:

- Suppliers expect prices to increase over the next six months in anticipation of stronger demand from recovering markets. As such, many are preparing to adjust quotes upward by as much as 10 percent.

- Underscoring the line's general optimism, export turnover is seen to jump by a significant margin. Half of featured suppliers indicated that overseas shipments are expected to increase by more than 10 percent. An equal number expressed confidence that revenue will rise by more than 20 percent.

- Price competition is the most critical challenge confronting manufacturers. Since many are unable to match lower prices offered by suppliers from a few other countries, India makers are employing many strategies to stay competitive.

This report covers the main types of ceramic products made in India, including figurines, oil burners, candle holders, door and cabinet knobs, vases, pots, mugs, bowls, plates, jars, coasters, serveware, and condiment and dinnerware sets.

The *Products & Prices* section details the features and price ranges of each key product category. It also includes the latest trends in style and materials.

The *Industry Overview* discusses key issues affecting exporters and elaborates on the composition of the industry, highlighting key characteristics of different types of suppliers.

In this report

- 8 in-depth company profiles
- 6 short company profiles
- 72 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics and charts

OBJECTIVE & METHODOLOGY

This India Sourcing Report is part of a series designed to provide buyers with information on new products from export manufacturers in supply markets that specialize in handmade merchandise.

The Developing Country Sourcing Report series is part of Global Sources' corporate social responsibility initiatives. It is offered in conjunction with The Kearny Alliance, whose mission is Aid Through Trade. The objective is to help create jobs in developing Asia through export promotion.

To produce this report, larger, midsized and emerging manufacturers—all with substantial export experience—were surveyed. The selection of suppliers is designed to reflect the composition of the industry in India in terms of geographic location, materials used and range of products offered.

For in-depth profiles, our researchers visited the facilities of each company and interviewed senior executives who discussed their recent performance and provided forecasts for the next 12 months. All other companies in this report were either visited or contacted by phone.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including a breakdown of exports by product type and market. Suppliers also participated in a survey designed to provide insight into the industry.

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INDUSTRY OVERVIEW

India is one of the world's most important sourcing centers for ceramics. Regarded as a strong alternative to other supply zones with limited capability in terms of design, the country is capable of producing a wide array of models ranging from traditional to contemporary.

Manufacturers of ceramic items are located in numerous districts and cities throughout the country. These hubs are also home to almost 550,000 skilled artisans who are employed by suppliers to impart knowledge on conventional design processes.

The industry benefits from a readily available supply of raw materials that are easily sourced from local vendors. Clay and quartz, two of the most important components for ceramic products, are extracted from several mines in various parts of the country.

According to the Indian Bureau of Mines, more than 1.57 million tons of clay and 264,664 tons of quartz were excavated in the fiscal year 2008 to 2009. The steady supply of materials helps manufacturers maintain low procurement costs.

The country also boasts many sourcing hubs that are scattered across several states. Each of these supply centers focuses on a specific range of product categories.

Challenges

Although India's ceramics industry is stable, a number of factors threaten to hamper its sustained development.

The continuing effects of the global economic crisis are some of the challenges facing suppliers in the line. Due to sluggish demand from major markets such as the US and the EU, export turnover has decreased dramatically.

According to the Chemical and Allied Products Export Promotion Council, overseas shipments of all types of ceramics from April 2008 to March 2009 reached only \$318.5 million, a reduction of almost 40 percent over the previous fiscal year.

Nonetheless, suppliers are optimistic that demand will pick up once again over the next 12 months as customers from key markets return to their previous purchasing levels. Many expect sales to grow by at least 10 percent over the preceding year.

In addition, the government has extended assistance to the industry by offering easy access to loans intended for factory and equipment upgrades. Funds are provided by the Ministry of Micro, Small and Medium Enterprises, and coursed through different national banks.

The government is also organizing face-to-face meetings between local

Supplier summary

Suppliers surveyed	14
Export sales	\$12.1mn
Export ratio	78%
Capacity utilized	79%
Full-time employees	741

Data: All surveyed suppliers

companies and foreign buyers as a way to directly facilitate trade.

Another hurdle confronting the industry is intense price competition, especially against China suppliers. Compared with India-made products, designs from China are priced 5 to 10 percent less because of lower labor costs. India makers are also affected by higher diesel and furnace oil costs, which have increased by at least 5 percent in 2009.

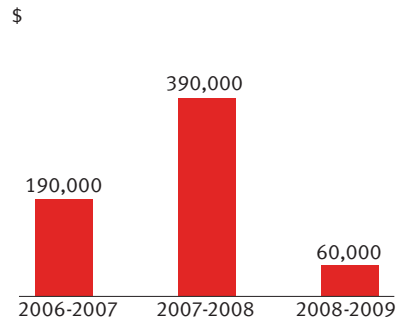
To address these challenges, manufacturers are switching to kilns that run on compressed natural gas, which is only a third of the cost of diesel and furnace oil.

Further, suppliers are enhancing efficiency by acquiring better equipment. As an example, some companies are replacing batch kilns with tunnel kilns. The latter speeds up production and lessens costs by processing more items at once.

Another step taken to offset cutthroat competition is by reducing profit

Export value

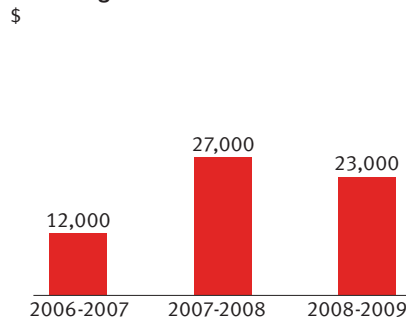
Ceramic tableware



Includes HS code 69120010

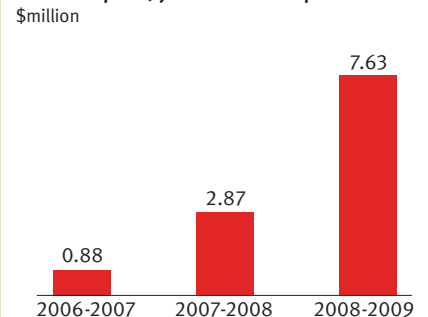
Source: India Department of Commerce Export Import Data Bank

Ceramic glassware



Includes HS code 70131000

Ceramic pots, jars & related products



Includes HS code 69099000 (Ceramic troughs, tubs, pots, jars & the like)

Chhatwal Ceramics

Established in 1973, Chhatwal is a locally owned ceramic tableware specialist. The company started exporting in 1995 and currently ships the bulk of output to the US, the UK and France.

The main products are mugs, cups, pickle jars and serving bowls. Ceramic door knobs and curtain brackets or finials are secondary lines.

Mugs generally have a capacity of 300mL and are priced from \$0.30 to \$0.40. Fancy models feature handles designed in various animal shapes. Motifs and patterns are handpainted on the body. Jars are available for \$1. They come with covers or lids, and are handpainted. Door knobs start at \$0.25.

The company sources kaolin from Rajasthan, Gujarat, Bihar, West Bengal and Delhi. Plastic ball clay comes from Rajasthan and Madhya Pradesh. Quartz and feldspar are procured from Jaipur, Udaipur, Ajmer and Alwar in Rajasthan state. Paints and glaze are purchased from local suppliers.

Chhatwal has six designers who release one or two new models every

day. Samples can be ready within 15 days.

The manufacturing unit is spread over an area of 3,000sqm. All production steps are performed in-house. These include raw material selection, shaping, molding, casting, firing, glazing, screen-printing, painting, finishing and packing.

The company operates a tunnel kiln that runs on furnace oil. It has a capacity of 30,000 cups and mugs per day. There are 100 full-time workers and 50 temporary employees.

QC is carried out by two inspectors who check all items for defects.

Production time for a batch of mugs or cups usually takes four to five days.

Items are packed individually in cardboard boxes and then shipped in corrugated cardboard master cartons.

The minimum order requirement is 1,000 pieces, deliverable within 30 days after order confirmation.

Chhatwal is a member of the Export Promotion Council for Handicrafts. It is planning to procure new roller ball mills and roller jiggers next year.

Capability

Equipment used

Gas kilns	—
Electric kilns	—
Coal/oil/diesel kilns	1
Ball mills	9
Power presses	—
Extrusion molding machines	Yes

Exports by product

Crafts	10%
Pottery	—
Tableware	90%

Exports by market

United States/Canada	50%
European Union	45%
Europe (non-EU)	—
Asia-Pacific	5%
Middle East	—
Other	—

Company facts

Year established	1973
Head office location	Khurja (Uttar Pradesh)
Ownership	Locally owned
Factory location(s)	Khurja (Uttar Pradesh)
Full-time employees	100
Part-time employees	50
Total annual sales (all products)	\$250,000

Sales & output: Ceramics

Annual sales	\$250,000
Share of total sales	100%
Annual export sales	\$100,000
Total monthly capacity	750,000 pieces
Average monthly output	750,000 pieces
Capacity utilized	100%
Average monthly exports	300,000 pieces
Export ratio	40%

Contact details

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Popular export models



Model: Handi Set
MOQ: 1,000 sets
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Serving bowl set; three pieces; glazed, handpainted; with lid; 12x15, 10x13 and 9x11cm



Model: Handi Set 2
MOQ: 1,000 sets
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Serving bowl set; three pieces; glazed, handpainted; with lid; 12x15, 10x13 and 9x11cm



Model: Ceramic mug with animal handle
MOQ: 1,000 pieces
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Mug; glazed, handpainted; handle in bear design; 10x8cm



Model: Blue colored ceramic mug
MOQ: 1,000 pieces
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Mug; glazed, handpainted; 10x8cm



Model: Jar S1
MOQ: 1,000 pieces
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Jar; glazed; with lid; black-and-white striped design; 18x12cm



Model: Small Handi
MOQ: 1,000 pieces
Packaging: Cardboard box, master carton
Delivery: 30 days
Price: •
Description: Small serving bowl; glazed, handpainted; with lid; 8x8cm

• Information not disclosed

PRODUCT GALLERY

Crafts



Kalra Cera
(profile page 24)
Model: Snake Lady Big
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 75 days
Price: •
Description: Figurine; ceramic stoneware; black glaze; 37cm high, 17cm wide



Kalra Cera
(profile page 24)
Model: Owl
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 75 days
Price: •
Description: Figurine; ceramic stoneware; unfinished; owl design; 33cm high, 27cm wide



Kalra Cera
(profile page 24)
Model: Mushroom figure
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 50 days
Price: •
Description: Figurine; ceramic stoneware; glazed, handpainted; mushroom design; 4.5cm high



Kalra Cera
(profile page 24)
Model: Red Indian Figure
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 50 days
Price: •
Description: Figurine; ceramic stoneware; glazed, handpainted; Native American design; 21.5cm high



Kalra Cera
(profile page 24)
Model: Devil figure
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 50 days
Price: •
Description: Figurine; ceramic stoneware; glazed, handpainted; devil design; 15cm high



Kalra Cera
(profile page 24)
Model: Animals
MOQ: 500 pieces
Packaging: Cardboard box
Delivery: 50 days
Price: •
Description: Figurines; unfinished; in various animal shapes; sizes start at 10cm high

• Information not disclosed

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