

景德鎮陶瓷業可以重振雄風嗎？

Is it possible for Jingdezhen porcelain industry to be prosperous again?

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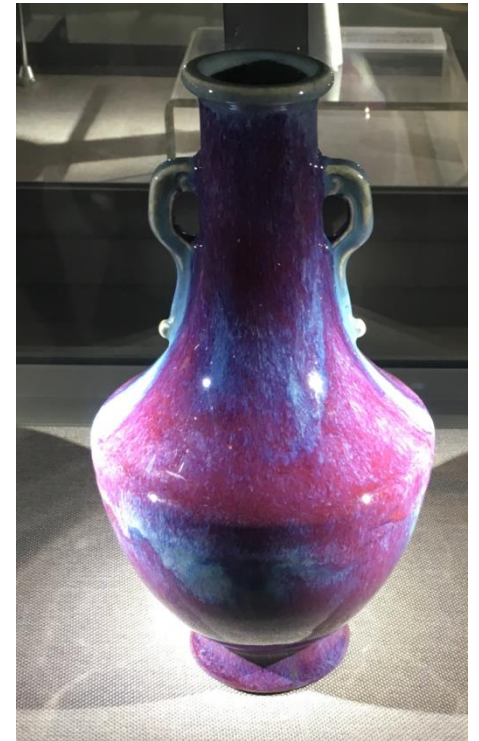


Presentation Outline

- Introduction
- History of Jingdezhen
- Methodology
- SWOT Analysis
- Suggestion

Historical and cultural backgrounds

- 「新平冶陶，始於漢世」
- 「白如玉，明如鏡，薄如紙，聲如磬」
- Song Dynasty (1004): Name after the Jingde period 「景德鎮」
- Yuen Dynasty: 「浮梁磁局」
- Ming and Qing: 「御器廠」、督陶官
- Serving the emperor for 600 years
- One-thousand-year celebration in 2004



Decline in modern times

- 1960-1980s
- Porcelains in Jingdezhen: 20% of China
- 2003
- Chaozhou porcelain: 11.7 billion yuan, 47% of city GDP
- Jingdezhen porcelain: 2 billion yuan, 15% of city GDP



Methodology

1. Literature review
2. Field observation
 - Agglomeration of porcelain shops locating at the 3 porcelain streets
 - Stress the name of Porcelain Capital (千年瓷都)
City slogans, advertisement etc.
 - Traces of porcelain found everywhere:
Street lamps, city decorations etc.



Methodology

3. Interview

- 5th June, 2016
- Ms Xia, owner of 朴炫坊, a porcelain shop in 2nd street of XiangJiangDong in Jingdezhen



Findings from interview

- Most revenue are generated from export, little from store business
- Worsening situation of fake “made in Jingdezhen” porcelain
- Heavily relies on digital marketing and sales



- Not many young people engage in porcelain crafting, except for family business or tradition



Strengths

1. Long history
 - A renowned porcelain town: 千年瓷都
 - Jingdezhen is a symbol of good quality porcelain
 - Cluster of skilled professionals



Strengths

2. Natural resources

- 高嶺山 and 高嶺土 (Kaolin)
- Rich in reserve and of high quality (300 years)
- Was the porcelain production base for the ancient emperors
- Rich in other kinds of mineral resources: chinastone, coal, tungsten, copper, fluorspar etc.

Strengths

3. Branding effect

- “To make people aware of the location and then linking desirable associations” (Keller, 2003)
- “Brands” of Jingdezhen: Porcelain

-E.g. Ancient Kiln Folk Customs Museum
(景德鎮古窯民俗博覽館)

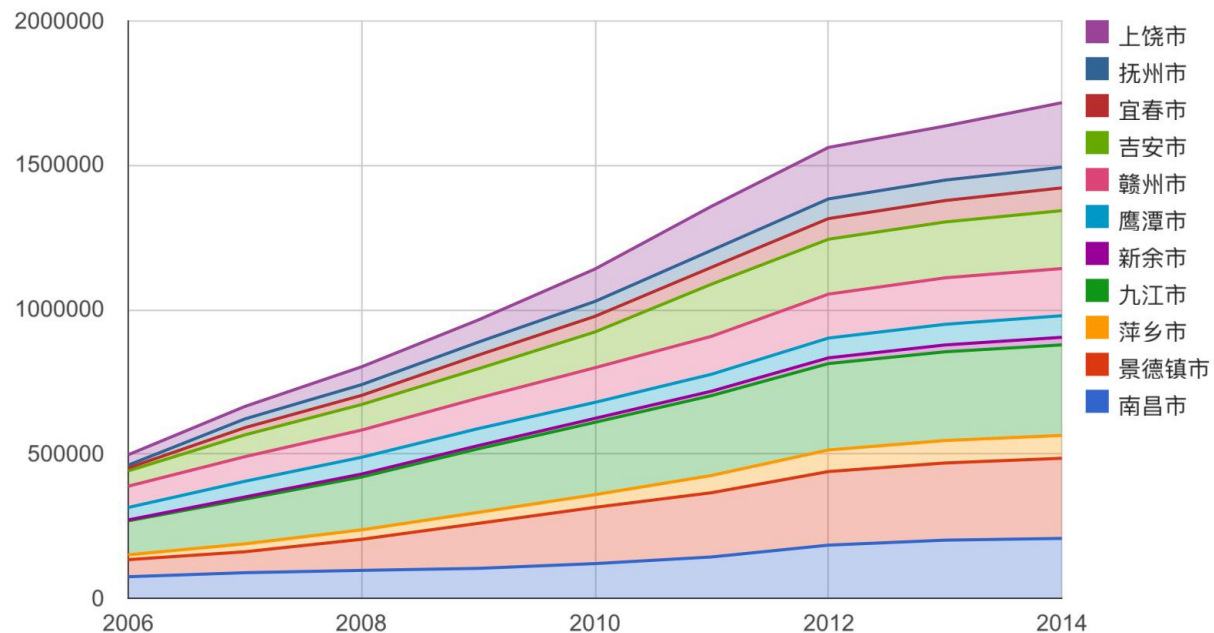
AAAA national tourist scenic spot

Provincial cultural heritage of special
importance(省級重點保護文物)

National Intangible Cultural Heritage

Guinness World Records





Strengths

5. Education for professionals

- The first and only official porcelain academy in China (景德鎮陶瓷大學)
- Dated back in 1910
- Ceramics research institutes: new technology and new products; 2000 researchers (half of the whole China)
- Constant supply of well-trained porcelain artists and makers
- Advancement on porcelain-making skills
- Reinforce the uniqueness and the quality of Jingdezhen's porcelain



Weakness

1. Depletion of natural resources

- Raw materials of porcelain production: Kaolin (高嶺土)
- Non-renewable resource
- Year extraction: 350,000 tonnes in 1980s to 88,000 tonnes in 2007
- In 2009: List of "Resource-Exhausted Cities" announced by the State Council
- Need government permits to extract Kaolin



Weakness

2. Drawbacks of Jingdezhen industrial organisation (Zhang, 2002)

- Production of handicrafts industry
- Too complex division of labour of every process
- 宋應星《天工開物》「共計一坯工力，過手七十二，方克成器」
- 「能分不能合，能散不能聚，不能積小體而為大體」
- Problems of laid off workers and small scale production after reform of "Ten Great Porcelain Factories"



【景德镇十大国营瓷厂一览表】

名 称	成立时间	生 产 重 点	职工人数
建国瓷厂	1949年8月	颜色釉瓷	1258 (1985年)
艺术瓷厂	1958年	高中档彩瓷	2098 (1985年)
宁波瓷厂	1958年	出口盘类和杯碟	1782 (1985年)
红星瓷厂	1958年7月	盘类和杯碟	1694 (1985年)
东风瓷厂	1959年2月	各种瓷类产品	2045 (1985年)
红旗瓷厂	1960年	釉下彩瓷	1738 (1985年)
光明瓷厂	1961年8月	玲珑瓷	1869 (1985年)
新华瓷厂	1964年	民族用瓷	1009 (1985年)
为民瓷厂	1966年6月	出口杯碟和咖啡具	1772 (1985年)
人民瓷厂	1969年	青花瓷	1717 (1985年)

【为民瓷厂职工生活】

【景德镇十大国营瓷厂一览表】

Weakness

2. Geographic location: low accessibility

- Located in inner region
- Rely on highways and waterways of Changjiang
- Contrast to coastal cities
- Benefits of Open Door policy and international trade

通湖达江 器走天下——景德镇水陆交通

By water or land, ceramic wares traveled to the world

——Jingdezhen land and water transportation, by “the silk road over the sea”

景德镇四面环山，自古陆路交通相对闭塞，比较重要的有徽饶古道、浮宁大道。而水路交通十分便利，昌江，作为景德镇物资供应和瓷器外运的重要通道，成为景德镇与外部世界沟通的纽带，被景德镇人亲切地称为“母亲河”。

昌江，主河道全长 182 公里，属鄱阳湖水系，发源安徽省祁门县，由北向南贯穿景德镇，最后汇入鄱阳湖。昌江除有东河、南河、西河、北河四条支流外，还有五十多条小支流织成纵横交错的交通河网。

自唐宋以来到 20 世纪初叶，昌江河东西两岸码头遍布，从观音阁到小港咀 13 华里的区间，有著名的“三洲”（黄家洲、西瓜洲、拜天洲）、“四码头”（许家码头、曹家码头、湖南码头、刘家码头）。码头各有分工，繁忙有序。清代郑廷桂在《陶阳竹枝词》中说道：“上下纷争中渡口，柴船才拢棹船开。码头柴棧各分堆，伙计收筹记数来。”可见昌江这条水上交通运输线的繁忙盛况。



〔景德镇瓷器远销海外线路〕

Weakness

3. Lack of quality control

- Ceramics shops in Jingdezhen
- Search Jingdezhen Ceramics in Taobao



淘宝网 Taobao.com 更多市场 宝贝 景德镇陶瓷 搜索

所有宝贝 天猫 二手 我的搜索 惠发现

所有分类 > 显示筛选 >

您是不是想找: 景德镇陶瓷花瓶 景德镇陶瓷花瓶仿古 景德镇陶瓷摆件 景德镇餐具 景德镇陶瓷摆件客厅 景德镇瓷器

综合排序 人气 销量 信用 价格 > < 发货地 > < 1/100 >

☐ 包邮 ☐ 赠送退货运费险 ☐ 货到付款 ☐ 海外商品 ☐ 二手 ☐ 天猫 ☐ 正品保障 更多 > 合并卖家

您好, "景德镇陶瓷" 相关的宝贝: 黄钻爱店铺 找到 500+ 件 | 回头客爱店铺 找到 500+ 件

¥58.00 183人付款
三勤堂功夫茶杯 景德镇陶瓷品 茗杯 手绘粉彩定窑白青瓷茶具
三勤堂旗舰店 江西 景德镇
掌柜热卖

¥75.00 947人付款
包邮 景德镇陶瓷器水点桃花 三件套花瓶现代时尚家饰客厅
鸿轩家居旗舰店

¥125.00 342人付款
包邮 景德镇陶瓷器 名家吴文瀚手绘青花瓷花瓶石榴 瑞池清
鸿轩家居旗舰店

¥6.50 2788人付款
包邮 陶瓷杯子带盖茶杯水杯 办公杯 景德镇瓷器定制 酒店
鹏博陶瓷旗舰店

¥12.16 销量: 306

¥98.00 销量: 29

¥58.00 141人付款
包邮 景德镇陶瓷富贵竹花瓶 摆件客厅加厚大号落地直筒水
蓝玉旗舰店 江西 景德镇

限时特价 ¥128.00 135人付款
景德镇陶瓷酒坛10斤20斤30斤古陶瓷带龙头酒坛子骨瓷
恒益家居旗舰店

¥29.00 104人付款
包邮 景德镇陶瓷器 手工影青瓷小花朵点提桌面摆设小口
昂高旗舰店 江西 景德镇

新品 买就送木质底座。 ¥26.00 861人付款
包邮 简约时尚摆设陶瓷小花瓶 景德镇工艺品摆件 客厅酒
a过期的面包 江西 景德镇

¥72.00 销量: ?

Opportunity

1. Potential for developing culture and creative industry
 - Over 5000 porcelain enterprises, mostly produce art pieces
 - Other cities: focus on producing functional, daily-used porcelain products
 - Jingdezhen: focuses more high-end, value-added art products
 - Target at customers with higher purchasing power
 - Consolidating its own uniqueness
 - Porcelain culture and creative industry is listed as one of the eight pillar industries of Jingdezhen by City government

Opportunity

2. Window to world market

- Used to be a porcelain producer to the royal family → Seek business themselves
- Mostly rely on walk-in customers
- Expand to digital market

Opportunity



- Export to the world: 和世界對話的城市
- 1990: First-ever Jingdezhen International Porcelain Festival
- 2004: First-ever China Jingdezhen International Ceramic Fair
 - celebration 1000th year of setup of Jingdezhen
 - State-level international fair
 - One of the most important exhibition fairs among 12 fairs in China
- Cultural exchange with other cities famous for porcelain in the world, e.g. Lichuan in Korea and Seto in Japan

Opportunity

3. Technological advancement

- Past: traditional manual forming
 - Present: semi-mechanized
 - Future: fully mechanized forming
- More efficient use of energy with machinery
- Potential to produce more with fewer resource
- Reduce production time
- Enhance productivity
- Better quality control

Threats

1. Internal competition

- Other porcelain production regions in China
- 2003, China National Art and Crafts Society (中國工藝美術協會) : Fujian Dehua as 「中國瓷都」、Zhejiang Longchuan as 「中國青瓷之都」、Henan Yuzhou as 「中國鈞瓷之都」、Fujian Yongchun 福建永春 as 「中國陶瓷燈飾之都」
- April, 2004, China National Light Industry Council (中國輕工業聯合會)、China Ceramics Industrial Association (中國陶瓷工業協會) name 廣東潮州 as 「中國瓷都」
- May, 2015, World Crafts Council (世界手工藝理事會) named Dehua as "World Capital of Porcelain"
- 「瓷都」稱號泛濫
- Jingdezhen loses its regional advantage and uniqueness

Comparison of porcelain industries in 2004

地名	產值 (億元)	稅收 (億元)	就業 (萬人)	出口 (萬美元)	陶瓷城(平方米)	上市公司(個)
佛山	220	4.9	15	15476	94000	1
潮州	65	2.5	10	26680	25000	0
泉州	38	1.8	8	12563	20000	0
景德鎮	14	0.2	8	1819	5000	0

Threats

2. Foreign competition

- Ming and Qing Dynasties: 1 million porcelains exported to Europe and America every year
- Importance of Jingdezhen in global porcelains trade
- Lack of Kaolin material and temperature technology in the West in Middle Age
- Industrial revolution: Production of high-quality porcelains
- Loss of material and technological advantages

Threats

3. Labor depletion

- Jingdezhen Ceramic Institute
- Students specialising in ceramics industry
- Attracted to coastal cities with higher salaries and better working environment
- Estimates in 2006: 3000 graduates from Jingdezhen work in ceramics industry in Foshan

Suggestions

1. Shifting from manufacturing industry to creative industry
 - Designate “porcelain art studio village”
 - Attract artists and young people to engage in porcelain-making
 - Transform old, conservative tradition to fusion of new age and tradition
2. More inputs in tourism marketing tourist attraction
 - Smile curve of value creation
3. Incentives for labor attraction
 - Cheaper tuition fee, more career opportunities
4. Certification system
 - For improving tourism branding in Jingdezhen
 - For digital sales of porcelain

Conclusion

- Facing internal disadvantages and external competition
- Branding effect remains strong in tourism
- Requires adjustment in government policy, transformation in porcelain industry, and future development in online marketing