China Wood Flooring Industry Report, 2010-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and State Forestry Administration, P.R. China etc.

Abstract

In 2010, Chinese wood flooring saw increase in both output and sales volume due to the rebound of real estate industry and the implementation of "building materials going to the countryside", with the output growing by 26.7% year on year to 479 million m2 and the sales volume increasing by 9.4% year on year to 398.5 million m2.

In 2011, affected by the tightened real estate regulation policy, rising wood price and the USA's anti-dumping and anti-subsidy investigation on a number of Chinese wood floor enterprises, Chinese wood flooring industry experienced a decline in prosperity, output and sales volume, and the decline was expected to exceed 6% throughout the year.

In 2012, China will continue to increase the control of the real estate industry, and the import environment of wood will face multiple tests; however, the termination of the USA's anti-dumping and anti-subsidy investigation and the further implementation of indemnificatory housing construction will bring about certain benefits to the wood flooring industry.

China Wood Flooring Industry Report, 2010-2012 published by ResearchInChina focuses on the development status of Chinese wood flooring industry, and researches 5 big wood flooring market segments and 13 key enterprises.

In China, wood flooring can be classified into the following five categories in general: solid wood flooring, engineered solid wood flooring, laminate wood flooring, bamboo wood flooring and cork wood flooring. Among them, engineered solid wood flooring and laminate wood flooring are generally known as engineered wood flooring.

In recent years, engineered wood flooring has witnessed rapid development in China due to its low price as well as its advantages of easiness for cleaning, wear resistance and impact resistance, etc. In 2010, engineered wood flooring occupied 56.0% and 82.1% of the total output and sales volume of wood flooring in China respectively, of which laminate wood flooring took the predominant position.

Comparatively, the output and sales volume of solid wood flooring have declined continuously, mainly owing to the restriction on wood export in many countries due to the lack of forest resources, which has promoted the price of solid wood flooring, thereby reducing manufacturers' profit and weakening the purchasing demand of consumers.

With the development of Chinese wood flooring market, large enterprises and big brands have led the way of development, such as Power Dekor, Nature, Elegant Living, DER, Anxin, Vohringer and Sichuan Shengda.

As one of the earliest wood flooring brands in China, **Power Dekor** has developed four product series including laminate wood flooring, engineered solid wood flooring, solid wood flooring and bamboo flooring, with an annual capacity of 58 million m2, including 46 million m2 of laminate wood flooring and 2 million m2 of solid wood flooring.

Nature is a core brand subordinated to China Flooring (**02083**), and its solid wood flooring, laminate wood flooring and engineered flooring take strong predominance. In recent years, with the improvement in the brand awareness of Nature, China Flooring has also seen increasing sales volume. In 2010, the sales volumes of the company's laminate wood flooring and solid wood flooring were 13.915 million m2 and 4.604 million m2 respectively, up 31.8% and 24.7% year on year separately. In H1 2011, the sales volumes maintained stable growth, rising 31.6% and 38.7% year on year respectively.

In 2011, **Elegant Living** delivered an outstanding performance; in terms of new product, it researched and developed the 'flooring' capable of being mounted on walls even ceilings; in marketing, it introduced two group purchase methods, namely, M2C (manufacturer to consumer) and W2C (warehouse to consumer); and in overseas layout, it successfully expanded markets in the Middle East and Russia.

DER is mainly engaged in the R & D, production and sales of 'DER' branded wood flooring. In production, the company adopts the mode combining independent production and entrusted processing; in marketing, it employs a flat in-depth marketing mode. Up to Jun. 30, 2011, its primary dealers and specialty stores were numbered 134 and about 1500 separately.

Anxin's business mainly involves the following five brands: Anxin, Weiguang, Baounite, xeeredu and ARK. In addition to the development of wood flooring, the company is actively expanding to the upstream wood market, and successfully set foot in the downstream redwood furniture market in 2011.

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