



China Construction Curtain Wall Industry Report, 2011-2012

Jun. 2012

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.

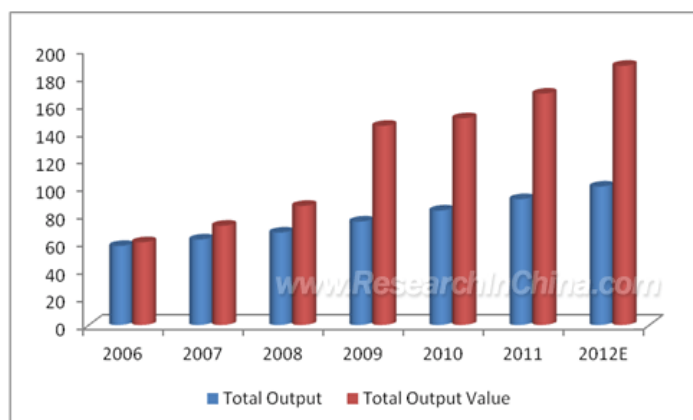
INFORMATION SOURCES

The primary information sources include China Building Decoration Association, China Construction Metal Structure Association and National Bureau of Statistics of China etc .

Abstract

The construction curtain wall industry is an important branch of the building decoration industry. In recent years, under the backdrop of rapid development of Chinese construction industry, China's construction curtain wall output and output value have maintained rapid growth. In 2011, the total output reached 91.3 million square meters, up 10.0% from a year earlier; and the output value got to RMB167.9 billion, rising 11.9% year-on-year, ranking first in the world.

China's Construction Curtain Wall Output and Output Value, 2006-2012 (Unit: million m², RMB bn)



Source: ResearchInChina "China Construction Curtain Wall Industry Report, 2011-2012"

After experiencing the previous extensive development stage, the curtain wall industry of China characterizes the followings:

Industry concentration degree increases gradually, and market competition pattern becomes stable.

During 2006-2011, in Chinese construction curtain wall industry, the output value of top 50 enterprises enjoyed a rising proportion from 20.5% to 59.6%. Meanwhile, in Chinese construction curtain wall market, Jangho and Yuanda became tycoons; more than 50 large-scale curtain wall enterprises play main roles, while numerous firms play supporting roles.

Curtain wall capacity is transferred to central and western regions of China.

During 2009-2010, the proportion of the output value in central and western regions of top 50 companies rose from 20.00% to 22.37%.

Copyright 2012ResearchInChina

PV curtain wall becomes new investment hotspots.

At present, photovoltaic construction curtain walls are the future development priorities for most companies, and they have begun to set up photovoltaic curtain wall production lines, even some ones have transformed into professional photovoltaic curtain wall manufacturers.

The demand for residential curtain walls is potentially huge.

In Chinese curtain wall consumer market, the housing market accounts for less than 4%, far lower than 20% in the developed nations, thus with vast room for the growth of Chinese residential curtain wall market.

The Middle East market is becoming saturated, while the markets in Europe and the United States become the focuses.

Chinese curtain wall companies boasted more than 50% share in the Middle East market in 2010, and it is hard to further raise the market share there. To further explore the international market, Yuanda, Jangho and other leading giants have started to make their efforts to tap into European market.

This report not only analyzes the status quo of Chinese construction curtain wall industry, but also studies 10 Chinese companies (Yuanda China, Jangho, Zhongnan, Keyuan, Shenzhen Sanxin, etc.) as well as five international tycoons (Permasteelisa, SCHUCO, YKK, Apogee, and Far East Global Group).

In 2011, Yuanda continued to give priority to the exploration of domestic and international markets. China's central and western regions, Europe and the United States became the company's revenue growth engines. To degrade the raw material price sensitivity, the company cooperated with Saint-Gobain and SAPA to get involved in glass and aluminum materials business and advance towards the upstream industrial chain.

Jangho acquired Chengda international in May 2012 to access into the field of interior decoration, transferring from a professional curtain wall engineering contractor to an indoor and outdoor decoration contractor. Zhongnan has been engrossed in BIPV in recent years, transferring from a traditional curtain wall manufacturer to a veteran PV curtain wall manufacturer.

Copyright 2012ResearchInChina

International curtain wall giant Permasteelisa Group achieved the revenue of EUR989 million in 2009, down 13% year on year. In 2011, the company was acquired by JS Group Corp which is a well-known Japanese building materials company. Then, Permasteelisa Group quitted from the market in Italy.

Japan YKK and USA Apogee saw significant decline in the economic crisis. In 2011, their performance rebounded. In the same year, YKK gained the revenue of JPY308.4 billion from building materials business, up 2.2% year on year; and the revenue of Apogee amounted to USD662 million, a 13.7% YoY rise.

1 Overview of Construction Curtain Wall Industry

- 1.1 Definition
- 1.2 Classification and Application
- 1.3 Industry Chain
- 1.4 Operating Mode
- 1.5 Industry Features
 - 1.5.1 Periodicity
 - 1.5.2 Regionality
 - 1.5.3 Seasonality
- 1.6 key Technologies
- 1.7 Technology Tendency

2 Development of China Construction Curtain Wall Industry

- 2.1 Development Environment
 - 2.2.1 Policy Climate
 - 2.1.2 Industry Environment
- 2.2 Market Size
- 2.3 Supply
- 2.4 Demand
 - 2.4.1 Public Building
 - 2.4.2 Commercial Building
 - 2.4.3 Residential Property
- 2.5 Development of Oversea Business
 - 2.5.1 The Middle East Market
 - 2.5.2 USA Market
 - 2.5.3 European Market
- 2.6 Price Trend

3 Market Analysis of Construction Curtain Wall Raw Material In China

- 3.1 Aluminum Material
- 3.2 Architectural Glass
- 3.3 Sealant
- 3.4 Hardware Fitting
- Summary

4 Competitive Landscape of China Construction Curtain Wall Market

- 4.1 Regional Competition
- 4.2 Corporate Competition
 - 4.2.1 Overall Competitiveness
 - 4.2.2 R&D Strength
- 4.3 Product Competition
- Summary

5 Key Enterprises Worldwide

- 5.1 Permasteelisa group
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 R&D
 - 5.1.4 Business in China
- 5.2 SCHUCO
- 5.3 Apogee
- 5.4 YKK
- 5.5 Far East Global Group

6 Key Enterprises in China

- 6.1 Yuanda China Holdings Limited
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Key Projects
 - 6.1.6 Orders
- 6.2 Beijing Jangho Curtain Wall Co., Ltd
- 6.3 Zhejiang Zhongnan Construction Group Co., Ltd
- 6.4 Shenzhen Keyuan Construction Group Co.,Ltd
- 6.5 Wuxi Wangxing Curtain Wall Decorative Engineering Co., Ltd
- 6.6 Shanghai Meitesh Curtain Wall Co.,Ltd
- 6.7 Guangdong Golden Curtain Wall Engineering Co.,Ltd
- 6.8 Shenzhen Sanxin Curtain Wall Engineering Co.,Ltd
- 6.9 Zhuhai Singyes Curtain Wall Engineering Co.,Ltd
- 6.10 Shenzhen Kingfacade Decoration Engineering Co.,Ltd

- 
- Classification of Construction Curtain Walls
 - Industry Chain of Construction Curtain Wall
 - Key Business Processes of Curtain Wall Enterprises
 - Laws and Policies on China Construction Curtain Wall Industry, 1996-2007
 - Total Output Value of China Building Industry, 2006-2011
 - Total Output Value of China Building Decoration Industry, 2006-2011
 - Total Output Value and Growth Rate of China Construction Curtain Wall Industry, 2006-2012
 - Output and Cumulative Output of Construction Curtain Wall in China, 2006-2012
 - Consumption Structure of Curtain Wall in China, 2006-2012
 - Fixed Asset Investments in Culture, Recreation and Sports in China, 2006-2011
 - Number of Airports in China, 2006-2012
 - Total Consumption Value of Public Building In China, 2006-2012
 - Construction Area of Office Buildings in China, 2000-2011
 - Completion Area of Office Buildings in China, 2000-2011
 - Construction Area of Commercial Buildings in China, 2000-2011
 - Completion Area of Commercial Buildings in China, 2000-2011
 - Number of Various Star Hotels in China, 2006-2012
 - Total Consumption Value of Commercial Buildings, 2006-2012
 - Total Consumption Value of Residential Property in China, 2006-2012
 - Growth Rate of Curtain Wall Demand of Residential Property Market in China, USA and Europe, 2006-2012
 - Construction Curtain Wall Market Scale in UAE, 2006-2012
 - Construction Curtain Wall Market Structure of UAE by Building Types, 2006-2012
 - Construction Curtain Wall Market Scale in USA, 2006-2012
 - Construction Curtain Wall Market Structure of USA by Building Types, 2006-2012
 - Construction Curtain Wall Market Scale in UK, 2006-2012

- 
- Construction Curtain Wall Market Structure of UK by Building Types, 2006-2012
 - Output Value of Unit Curtain Wall Engineering in China, 2005-2010
 - Output and Total Output Value of Curtain Wall Industry in China, 2006-2012
 - Cost Structure of Key Curtain Wall Enterprises in China, 2011
 - Output and Apparent Consumption of Aluminum Material, 2006-2011
 - Import & Export of Aluminum Material, 2006-2011
 - Spot Price of Aluminum in China, 2006-2012
 - Monthly Output and Growth Rate of Flat Glass in China, 2010-2011
 - Monthly Sales and Growth Rate of Flat Glass of Key Enterprises in China, 2010-2011
 - Monthly Inventory and Growth Rate of Flat Glass of Key Enterprises in China, 2010-2011
 - Ex-factory Price Indices of Flat Glass in China, 2009-2011
 - Production Capacity of Silicone Sealant Manufacturers in China, 2011
 - Demand for Silicone Sealant in China, 2005-2011
 - Output, Apparent Consumption, Import and Export Volume of Aluminum Materials, 2006-2011
 - Regional Distribution of Top 50 Construction Curtain Wall Enterprises in China, 2006-2010
 - Output Value Distribution of Top 50 Construction Curtain Wall Enterprises in China, 2009-2010
 - Top 20 Construction Curtain Wall Enterprises in China, 2010
 - Total Output Value and % of Industry of Top 50 Enterprises in China, 2006-2011
 - Market Share of Curtain Wall Manufacturers in China (by Revenue from Curtain Wall)
 - Ranking by the Number of Patents of Curtain Wall Enterprises in China, 2006-2010
 - Total Output Value and % of Industry of Top 50 Enterprises in China, 2006-2011
 - Revenue and Net Income of Permasteelisa Group, 2007-2010
 - Revenue Breakdown of Permasteelisa Group by Products, 2010
 - Revenue Breakdown of Permasteelisa Group by Region, 2010
 - R&D Costs and % of Revenue of Permasteelisa Group, 2007-2010

- 
- Curtain Wall Projects of Permasteelisa Group in China, 2004-2010
 - Revenue of Permasteelisa Group in China, 2007-2010
 - Revenue of SCHUCO, 2006-2010
 - Businesses of Apogee
 - Revenue and Net Income of Apogee, FY2008-FY2012
 - Revenue of Apogee by Businesses, FY2009-FY2012
 - R&D Costs and % of Total Revenue of Apogee, FY2009-FY2012
 - Gross Margin on Sales of Apogee, FY2009-FY2012
 - Main Businesses and Products of YKK AP
 - Revenue and Operating Income of Building Products of YKK, FY2008-FY2011
 - Revenue and Net Income of Far East Global Group, 2007-2011
 - Revenue and Gross Margin of Far East Global Group by Region, 2010-2011
 - Gross Margin on Sales of Far East Global Group, 2007-2011
 - Revenue and Net Income of Yuanda, 2008-2011
 - Revenue and Proportion of Yuanda by Region, 2008-2011
 - Gross Margin of Main Businesses of Yuanda, 2008-2011
 - Proposed and Ongoing Construction Curtain Wall Projects of Yuanda, 2011
 - Contract Value of Yuanda by Region, 2008-2012
 - Projects and Contract Value of Yuanda, 2011
 - Revenue and Net Income of Jangho, 2009-2012
 - Revenue of Jangho by Product, 2009-2011
 - Revenue of Jangho by Region, 2009-2011
 - Gross Margin of Jangho, 2009-2011
 - Key Ongoing Construction Curtain Wall Projects of Jangho, 2011
 - Contract Value of Jangho, 2008-2011

- 
- R&D Costs and % of Total Revenue of Jangho, 2008-2011
 - Bidding Projects Won by Zhejiang Zhongnan Construction Group, 2011-2012
 - Bidding Projects Won by Shenzhen Keyuan Construction Group, 2011
 - Key Curtain Wall Projects of Wuxi Wangxing
 - Bidding Projects and Value of Wuxi Wangxing, 2011-2012
 - Bidding Projects Won by Guangdong Golden, 2011-2012
 - Revenue and Net Income of Shenzhen Sanxin, 2009-2011
 - Revenue of Traditional Curtain Wall Projects of Zhuhai Singyes, 2009-2011
 - Bidding Projects Won by Shenzhen Kingfacade, 2011-2012
 - Revenue and Net Income of Key Curtain Wall Enterprises in China, 2011

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

Hard copy2,100 USD
 PDF (Single user license)2,000 USD
 PDF (Enterprisewide license)..... 3,200 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.