



# China Building Decoration Industry 12th Five-Year Plan Report

Nov. 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 (CBDA) etc.

## Abstract

With the aggressive development of economy, China's pace towards urbanization over the years has been accelerated, a large number of new houses and public facilities have provided huge space for the development of building decoration industry. In 2006-2010, China's urbanization rate rose from 42.99% to 49.68%, with an average annual increase of 1.34 percentage points, which stimulated construction demand of 800 million square meters, and total output value of building decoration industry went up from RMB1.4 trillion to RMB2.1 trillion, with an AAGR of 10.7%. In order to promote healthy and rapid development of the industry, China Building Decoration Association introduced the China Building Decoration Industry 12th Five-Year Plan in June 2011.

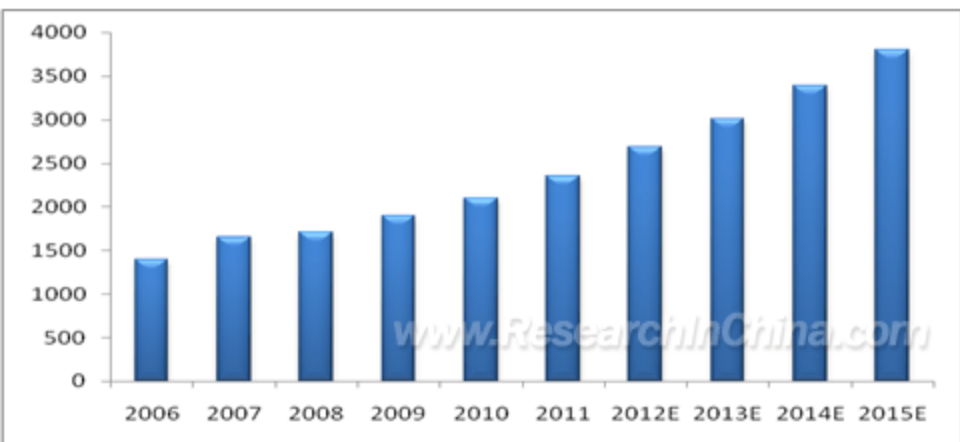
The Plan makes a review of the industry development over the past five years in all aspects of environment, enterprises, influencing factors and existing problems; meanwhile, based on the current economic situation as well as prospects for urbanization propulsion process, combined with the industry development status, it formulates clear goals for the building decoration industry and specific measures to achieve them. In addition, the Plan elaborates the development status

and future development objectives for building decoration industry segments i.e. public building decoration, housing, residential decoration and curtain wall engineering.

It is expected that in the 12th Five-Year Plan period (2011-2015), China's urbanization ratio will see annual growth of nearly one percentage point, and about 13 million agricultural population will transform into urban population, thus directly stimulating construction demand of over 600 million square meters. Then, China's industrial restructuring, improvement of industrialization level and development of emerging industries require more advanced production environment, and will also generate enormous demand for industrial building decoration. Furthermore, the Emission Reduction Reconstruction Project for the existing 40-billion-m<sup>2</sup> high energy-consuming buildings will shape a new professional engineering market, even an ever-growing huge market for the future building decoration industry. Engineering output value, according to forecasts, will reach RMB3.8 trillion in 2015, an increase of RMB1.7 trillion over 2010, with an overall growth rate of 81% and an average annual growth rate of 12.3% or so.

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## Total Output Value of China Building Decoration Industry, 2006-2015 (Unit: RMB billion)



Source: China Building Decoration Association

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### 1. Review of Industry Development in the 11th Five-Year Plan Period (2006-2010)

#### 1.1 Industry Scale Continues Growth & Specialized Markets Sustain Development

##### 1.1.1 Industry Scale

##### 1.1.2 Practitioner Team

##### 1.1.3 Specialized Market for Public Building Decoration

##### 1.1.4 Specialized Market for Building Curtain Wall

##### 1.1.5 Specialized Market for Residential Decoration

#### 1.2 Main Features of Industry Development in the 11th Five-Year Plan Period

##### 1.2.1 Significant Progress in Industrialization

##### 1.2.2 Certain Improvement in Corporate Concentration

##### 1.2.3 Advancement in Market Flexibility, with Obvious Results in Management Structure/Layout Adjustment, Access to Capital Market, etc..

##### 1.2.4 Technological Innovation Receives New Development & Scientific-Technical Progress Sees Improvement

#### 1.3 Key Factors for Achievements in the 11th Five-Year Plan Period

##### 1.3.1 Sound Macroeconomic Situation

##### 1.3.2 Enterprises' Positive Response to Opportunities from Major International Activities and Market

##### 1.3.3 Specific Targets for Industry Development

##### 1.3.4 Active Role of Industry Association

#### 1.4 Insufficiencies of Industry Development in the 11th Five-Year Plan Period

##### 1.4.1 Still Low Level of Industrialization

##### 1.4.2 Annual Decline in Corporate Profitability

##### 1.4.3 Non-standard Market Management

##### 1.4.4 Low Integrity Level

##### 1.4.5 Weak Innovation Capability

##### 1.4.6 Unsettled Underlying Problems

### 2. Guiding Ideology and Goals for Industry Development in the 12th Five-Year Plan Period (2011-2015)

#### 2.1 Macroeconomic Environment and Market Situation in the 12th Five-Year Plan Period

##### 2.1.1 Social Demand for Building Industry Remains Strong and Scale of Construction Maintains Significant Growth

##### 2.1.2 China's Real Estate Control Policies will Proceed, but Real Estate Position as Pillar Industry in National Economy Remains Unchanged

##### 2.1.3 Energy Conservation, Environmental Protection and More Stringent Technological Standards Impose Higher Technical Requirements on Building Decoration Engineering

##### 2.1.4 Goal for Establishment of Innovative Country Will Raise a Series of New Requirements on Industry Development

#### 2.2 Guiding Ideology

#### 2.3 Development Objectives

### 3. Main Measures for Development of China Building Decoration Industry in the 12th Five-Year Plan Period

#### 3.1 To Firmly Focus on Priority of Raising Industrialization Level, To Realize Industry Transformation and Upgrade via Revolution in Production Mode

#### 3.2 To Improve the Ability of Taking Advantage of Market in Resource Allocation, To Enhance Developmental Vitality

#### 3.3 To Promote Enterprises' Professional Development Capability, To Create a Batch of Professional Firms with Brand Influence

#### 3.4 To Increase Scientific-Technical R&D Investment, To Improve Pertinence and Effectiveness of Technical Progress

#### 3.5 To Take Design Work Seriously, To Boost Cultural & Creative Level of Engineering Products

#### 3.6 To Make the Utmost of the Two Markets and Two Resources, To Carry out the Development Strategy of "Going-out"

#### 3.7 To Strengthen Lessons Learned and Theoretical Study of Industry Development, To Raise Consciousness in Sustainable Industrial Development

#### 3.8 To Concentrate on Integrity Construction, To Purify and Standardize Market Environment

#### 3.9 To Improve Talent Aggregation Ability, To Erect High Quality Human Resource Support

#### 3.10 To Conscientiously Strengthen Building of Associations at All Levels, To Regularize Associate Behavior, To Play Associate Role

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