



**China Wood Flooring Industry Report,
2012-2013**

May 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

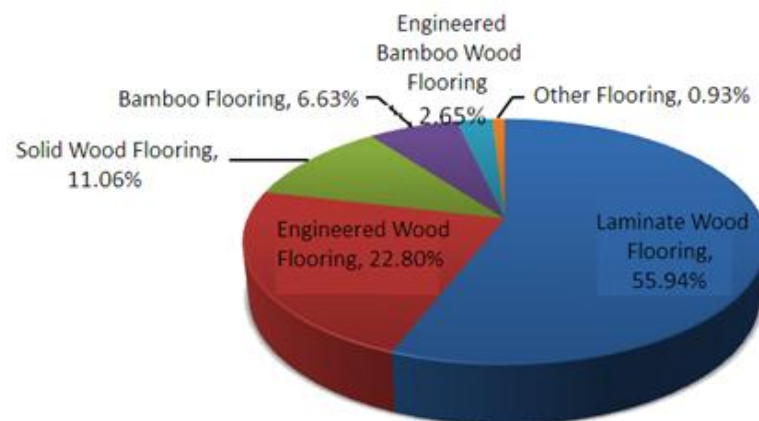
Compared to 2011, China's flooring market boom showed decline in 2012, mainly affected by the rising costs of labor, store rentals, etc., regulatory policies on downstream real estate sector, and otherwise. In 2012, China's wood flooring market reached sales volume of 377 million square meters, a YoY fall of 5%.

Relative to the market downturn, China's wood flooring production capacity driven by investment saw excessive growth. In 2012, China's flooring output amounted to 679 million square meters, a year-on-year increase of approximately 8%, and the problem of periodic overcapacity already emerged.

In 2012, there were more than 2,300 wood flooring manufacturers in China, primarily located in Zhejiang, Jiangsu, Shanghai, Guangdong, Yunnan, Beijing, northeast and other places.

Judging from the market segments, laminate wood flooring still held the first position in sales volume, yet accompanied by a decreasing market share. Falling prices of high-end products such as solid wood flooring and engineered wood flooring weakened the price advantage of laminate wood flooring. In 2012, laminate wood flooring, engineered wood flooring and solid wood flooring accounted for market share of 55.94%, 22.8% and 11.06%, respectively.

Sales Volume Breakdown of Wood Flooring in China (by Product), 2012



Source: Floor Committee of China National Forest Product Industry Association
www.researchinchina.com China Wood Flooring Industry Report, 2012-2013

On the basis of analyzing Chinese wood flooring industry environment and market competition, China Wood Flooring Industry Report, 2012 also focuses on the operation and development planning of leading domestic companies.

As a producer of medium-to-high grade laminate flooring and engineered wood flooring, Der International Home Furnishing Co., Ltd. embarked on the gradual fulfillment of the flooring supply agreement with Poly Real Estate Group, Vanke Real Estate and Evergrande Real Estate Group in the second half of 2012. As the three real estate leaders had stronger bargaining power than ordinary purchasers, Der's household products over the corresponding period saw a decline in gross margin.

In March, 2013, A&W (Shanghai) Woods Co., Ltd. won the bidding of Vanke Group 2013-2014 CD Flooring Supplier. In the next two years, Vanke's CD projects are expected to consume 6.505-million-square-meter flooring products. In April 2013, A&W won the bidding of GreenLand Group 2013 Share-Controlling Supplier. According to the framework agreement, the flooring pavement will cover an area of over 700,000 square meters.

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