



China Construction Curtain Wall Industry Report, 2012-2013

July 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

In recent years, the urbanization in China has been accelerating, with the mushrooming of numerous large public buildings, commercial buildings and high-end residences, which conduces to the swelling market size of the construction curtain wall industry. In 2006-2011, the gross output value of China construction curtain wall industry rose from RMB60 billion to RMB180.3 billion at the CAGR of 24.6%. In 2012, the industry attained the engineering output value of about RMB220 billion, with a year-on-year increase of 22%.

In 2013, in the context of the monetary tightening of the People's Bank of China and the slowdown of the investment in the construction industry, it is expected that the output value growth rate of China construction curtain wall industry will decline to 15% or so. According to Twelfth Five-year Development Plan of China Architectural Decoration Industry released by China Building Decoration Association (CBDA), the output value of China construction curtain wall industry will hit RMB400 billion by 2015, and the CAGR during 2011-2015 will be 21.7%.

In terms of construction curtain wall consumption structure in China, the downstream markets include commercial buildings, public buildings and high-end residences. In 2012, commercial buildings took the lion's share 67.5% of the total spending on curtain walls; public buildings consumed 29.2%; high-grade residences only used about 3.3%.

In the next few years, as China strengthens the macro-control on real estate sector and the People's Bank of China conducts tightened monetary policies, the growth rate of the curtain wall consumption applied to commercial properties and housings will drop somewhat, while the consumption in public buildings will see steady growth.

China Construction Curtain Wall Industry Report, 2012-2013 mainly analyzes current situation, market size, competitive structure and raw materials of the construction curtain wall industry, as well as studies the operation, financial indicators and construction projects of domestic and foreign curtain wall companies.

The Italian architectural decoration firm Permasteelisa Group is one of the world's leading manufacturers of construction curtain wall. The company has two production bases in China, namely Dongguan Production Base and Suzhou Production Base. In 2007-2012, Permasteelisa's revenue from Mainland China increased from EUR22.57 million to EUR133 million, with the CAGR of 42.6%.

As an exclusively funded subsidiary of Yuanda China, ShenYang YuanDa Aluminium Industry Engineering Co., Ltd is the largest manufacturer of construction curtain wall in the world, with four major industrial bases in Shenyang, Shanghai, Chengdu and Foshan. Besides, it boasts the world's largest curtain wall manufacturing base covering an area of 1.1 million square meters. The total area of the industrial bases reaches 1.37 million square meters. All these bases are equipped with nearly 700 sets of advanced automatic processing equipment and tools. As of 2012, the company's curtain wall capacity had been 12.5 million s.qm/year.

Jangho Curtain Wall Co., Ltd. is a provider of curtain wall system solutions. In 2013-2014, Beijing Headquarters Base Construction Project and its sequent expansion project as well as Photovoltaic Curtain Wall Project built by the company with raised funds will be completed and put into operation. After the production, the company's curtain wall capacity will increase by 2 million square meters.

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