



**China Construction Curtain Wall Industry
Report, 2013-2016**

Apr. 2014

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

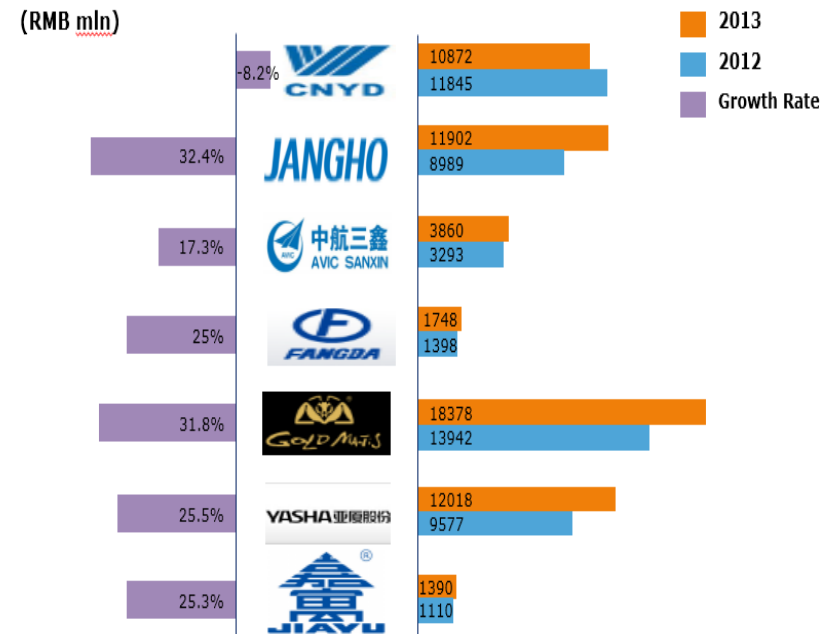
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

The prosperity of construction market has effectively promoted the development of building decoration industry in recent years. In 2013, total output value of China's building decoration industry climbed 12.9% YoY to roughly RMB2.97 trillion, 8-10% of which came from the construction curtain wall industry, an important branch of building decoration industry.

After more than 20 years of development, China has become the world's largest curtain wall producer, with construction curtain wall production approximating 115 million square meters (a year-on-year increase of 15%) in 2013. With the rapid process of urbanization in China, a considerable number of large public buildings, commercial buildings and high-grade residences have sprung up, which triggers rapid growth in demand for construction curtain wall. In 2013, commercial buildings boasted the largest share of China's total consumption of curtain wall, accounting for about 66.8%, followed by public buildings, and high-grade residence occupied the smallest proportion of approximately 3.1%.

Operating Income and Growth Rate of Key Construction Curtain Wall Enterprises in China, 2013



Source: China Construction Curtain Wall Industry Report, 2013-2016; Research In China

China's construction curtain wall enterprises are mainly distributed in the economically developed, highly urbanized Yangtze River Delta, Pearl River Delta and Bohai Economic Rim. However, following China's coastal economic slowdown as well as the implementation of Mid-western Development, Northeastern Old Industrial Base Revitalization and other strategies, there is a general trend towards the three economic outsiders in domestic curtain wall market. Based on the regional distribution of top 50 Chinese enterprises in 2013, the number of enterprises in East China was reduced by 3 to 23, while Northeast and Central China saw increases of 2 and 1, respectively.

Currently, the Chinese construction curtain wall market has established the "large enterprises-based, SME (small and medium-sized enterprises)-supplemented" pattern, of which, Yuanda China, Jangho Curtain Wall, AVIC Sanxin, China Fangda Group, Gold Mantis and YASHA serve as benchmarking enterprises. In 2013, Jangho Curtain Wall reached bid amount of RMB21.7 billion, showing a year-on-year increase of 49% (including RMB8 billion from decoration orders); new orders signed by China Fangda Group climbed 36% YoY to RMB2.84 billion (curtain wall system and material industry contributed RMB2.4 billion, up 26.9% YoY); Gold Mantis gained new orders of RMB24.24 billion, showing a year-on-year increase of 41%.

China Construction Curtain Wall Industry Report, 2013-2016 of ResearchInChina focuses on the followings:

- ✘ Status quo of China construction curtain wall industry, including policy environment, industry environment, market size, supply and demand, overseas business development, price trend, etc.;
- ✘ Raw material market profile of China construction curtain wall industry, including the analysis of aluminum, architectural glass, sealant and hardware fittings markets;
- ✘ Competition market of China construction curtain wall market, involving regional competition, enterprise competition, product competition, etc.;
- ✘ Operation, business (in China), etc. of five key companies worldwide (including Permasteelisa Group, SCHUCO, Apogee, YKK, Far East Global Group);
- ✘ Operation, constructionon curtain wall business, etc. of 11 key companies in China (e.g. Yuanda China, Jangho Curtain Wall, AVIC Sanxin, China Fangda Group, Gold Mantis, Yasha Decoration, Jiayu, Golden Curtain Wall, Wuxi Wangxi, Zhuhai Singyes, King Facade).



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