

**China Wood Flooring Industry
Report, 2014-2018**

May 2015

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

As people's consumptive level gets improved and they are in pursuit of high-quality life, wood flooring sees a growing proportion in the flooring industry of China, up from 33.9% in 2009 to 36.2% in 2014, being the second largest flooring product only behind ground tile.

In 2014, Chinese wood flooring market, affected by the depressed real estate sector at home, witnessed a slowdown in growth rate, and the sales volume reached 390 million square meters with a year on year decline of 2.8%. In 2015, Chinese Government issued a series of favorable policies such as lowering the proportion of down payment for second house loans and the exemption of sales tax for ordinary housing (the for-sale house has to be the one he/she bought at least two years ago), which helped the gradual recovery of commercial housing market and spurred the demand for wood flooring. It is expected that, the sales volume of wood flooring will grow by 4.2%.

Seen from wood flooring market segments, laminate wood flooring enjoys highest sales volume, and its sales figure in 2014 approximated 210 million square meters, accounting for 54.7% of total sales volume of wood flooring in China, but seeing a drop of 1.3 percentage points year on year; while engineering hardwood flooring and bamboo flooring are increasingly welcomed by the consumer due to merits like environmental friendliness and high price-to-performance ratio.

Wood Floor Sales Volume and Production & Marketing Layout of China Main Manufacturers, 2014

| Manufactures | Sale Volume (㎡ mln) | Production and Marketing Layout |
|---|-----------------------|--|
|  | 44.3 | Having 10 floor and accessory plants, with the capacity of 52 million square meters/a; Setting up 50 branches around the globe (including 5 overseas companies, which are located in America, Germany, Korea, Canada, etc.); Establishing 3,000 floor stores in China, mainly situated in North and South China; |
|  | 26.8 | Having four wood floor production bases (3 in Guangdong, 1 in Jiangxi); Establishing 3,404 floor stores in China; Officially launching "O2O+DFC" marketing mode in 2015; |
|  | 12.8 | Wood floor production bases are distributed in Zhejiang and Paraguay; There are 1,750 floor stores in China and 125 sales outlets in America, Japan, India and other places; |
|  | 9.2 | Wood floor production bases are distributed in Liaoning, Chengdu, Suzhou, Hebei, and other places; There are around 2,500 floor stores and 7 logistics centers in China, as well as experience centers in Asia Pacific, Europe and North America; |
|  | 6.4 | Wood floor production bases are distributed in Chengdu, Tianjin and Shanghai; |
|  | 1.8 | Wood floor production bases are distributed in Jiangsu, Jiangxi, Zhejiang, etc.; Planning to open Tubaoobao Online Mall based on the existing Tmall and Alibaba business platforms; |

Source: China Wood Floor Industry Report, 2014-2018; ResearchInChina

The famous brands in Chinese wood flooring market consist of Power Dekor, Nature, Der, Shengda and Tubaobao, among which Power Dekor has realized nationwide layout, while other brands still adhere to operational mode focusing on sales in some regions and radiating towards neighboring areas, take examples for Nature Home mainly targeting Beijing market, Shengda aiming at Sichuan market, and V?hringer with advantages in cities like Xi'an and Shenyang.

Dare Technology: with its flagship brand Power Dekor, the company's sales volume amounted to 44.3 million m² in 2014, ranking first nationwide. In 2015, Dare Technology spun off non-core assets including aluminum business, printing business, filter materials, wheel hubs, information technology, etc., in a bid to be primarily involved in timber sector (wood-based panel, wood flooring, etc.).

Nature Home: it mainly produces laminate wood flooring, solid wood flooring and engineered flooring, and boasts 3,404 stores (as of 2014) in China. In April 2015, the offline life experience hall of company's e-commerce brand Nature HOME was opened in Hangzhou city, marking the formal starting the O2O+DFC marketing mode.

Der Int'l Home: In March 2015, the 6-million-m²/a laminate flooring project of Liaoning Der Flooring Co., Ltd and the 120,000-m² medium- and high-density fiberboard project of Liaoning Der New Materials Co., Ltd completed construction and put into production successively, which will conduce to the company's deep exploration of markets in Northeast China and North China.

China Wood Flooring Industry Report, 2014-2018 by ResearchInChina sheds light on the following:

- Status quo of and key players in global wood flooring market;
- Industrial environment and policy climate for wood flooring in China;
- Size, structure, competitive landscape, export, etc of Chinese wood flooring market;
- Status quo, competition pattern, characteristics and otherwise of Chinese wood flooring market segments;
- Supply & demand, import & export, etc of China wood flooring raw materials market;
- Operation, revenue structure, wood flooring business and so forth of 14 Chinese flooring manufacturers.

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