Windows & Doors in China

Industry Study with Forecasts for 2014 & 2019

Study #2760 | June 2011 | $5300 | 262 pages
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Gains will be driven primarily by strong building construction activity, and by a rise in the average size of a housing unit, requiring more windows and doors per unit.

Demand in China to rise 7.7% yearly through 2014

Demand for windows and doors in China is forecast to rise 7.7 percent annually to ¥365 billion in 2014, a deceleration from the 2004-2009 pace but still among the fastest rates of increase in the world. Gains will be driven primarily by strong building construction activity, spurred by the country’s further industrialization and urbanization. A rise in the average size of a housing unit -- requiring more windows and doors per unit -- will also contribute to gains.

Plastic windows to gain share on metal types

Sales of windows are forecast to grow at a strong annual rate through 2014. Metal windows comprise about 60 percent of the market. The second most popular material is plastic, which is growing at the fastest rate and is taking share from metal windows, particularly in the residential market. Wood windows comprise a very small portion of the total, with their use generally limited to high-end residential construction.

Doors to be fastest growing segment

Demand for doors in China is expected to advance at an even faster rate than windows through 2014. In the door segment, wood is the dominant material due to its ubiquitous use in interior doors for both residential and nonresidential applications. The emergence of wood doors made from new composite materials such as plastic/wood composites, will further support advances in overall wood door demand. Metal doors account for nearly a quarter of the door market in China where they mainly serve as entrance doors in both residential and nonresidential applications.

Central-North to be fastest growing regional market

Benefiting from rapid progress in urbanization and industrialization, demand in the Central-North will grow the fastest of any regional market through 2014. However, the Central-East region will remain the largest window and door market, accounting for nearly one-half of total sales in 2014 due to its large population and economy.
Sample Text, Table & Chart

METAL WINDOWS & DOORS

Metal Doors

Demand for metal doors in China is expected to advance 7.5 percent per annum to ¥25.5 billion in 2014. Construction of new buildings, primarily driven by the residential segment, as well as demand for specialty doors in the commercial market will benefit from security doors having near-perfect performance over the past decade, while improving as well as raw material costs rising. Most security doors are made from ordinary steel, but some manufacturers are introducing new products, such as stainless and wood- or vinyl-coated metal doors, to improve aesthetics leading to higher prices.

Gains in metal door demand will also be driven by growth in the nonresidential construction market. Metal doors offer commercial architects, property managers and designers the physical properties needed to withstand heavy use patterns, such as frequent openings and closings and damages caused by impacts. For example, shipping docks on warehouses and manufacturing plants are most often made from metal due to their ability to withstand damages caused by trucks, materials handling equipment, unsteady loads and operator error. Moreover, increasing concerns about security will lead to the installation of doors with thicker metal plates. These doors feature enhanced protection against blasts, fire and physical attack, making them ideal for a wide range of applications, such as airports, manufacturing plants, warehousing facilities, utility plants, banks and shopping malls.

Demand for metal doors will also be affected by increased competition from doors made from other materials. For example, in residential bathroom and kitchen applications, metal doors are being replaced by doors made from plastic, plastic-clad wood, and metal-clad wood. Windows & Doors in China - Industry Study with Forecasts for 2014 & 2019

<table>
<thead>
<tr>
<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
</tr>
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<td>Building Construction Expenditures</td>
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<tr>
<td>¥ plastic windows/doors/000¥ constr.</td>
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<tr>
<td>Plastic Window &amp; Door Demand</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windows</td>
<td>6.6</td>
<td>32.9</td>
<td>65.0</td>
<td>97.5</td>
<td>152.5</td>
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<tr>
<td>Doors</td>
<td>0.9</td>
<td>2.1</td>
<td>3.3</td>
<td>4.0</td>
<td>6.0</td>
</tr>
<tr>
<td>By Material:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vinyl</td>
<td>6.5</td>
<td>33.7</td>
<td>61.9</td>
<td>90.0</td>
<td>135.5</td>
</tr>
<tr>
<td>Fiberglass &amp; Other</td>
<td>0.1</td>
<td>1.3</td>
<td>6.4</td>
<td>11.5</td>
<td>23.0</td>
</tr>
<tr>
<td>+ net exports</td>
<td>0.1</td>
<td>0.3</td>
<td>0.8</td>
<td>1.5</td>
<td>2.0</td>
</tr>
<tr>
<td>Plastic Window &amp; Door Shipments</td>
<td>6.7</td>
<td>35.3</td>
<td>69.1</td>
<td>103.0</td>
<td>160.5</td>
</tr>
</tbody>
</table>

TABLE V-1

PLASTIC WINDOW & DOOR SUPPLY & DEMAND IN CHINA
(billion yuan)

CHART VIII-2

WINDOW & DOOR DEMAND IN CHINA BY REGION, 2009
(251.1 billion yuan)
Sample Profile, Table & Forecast

China Simto Group Company Limited
Chengxi Industrial Zone
No. 16, Lantian Road
Yongkang, Zhejiang 321300
China
86-579-8725-3699
http://www.xinduo.com

Annual Sales: ¥1.2 billion [US$176 million] (2009, reported by company)
Employment: 5,000 (2009, as reported by company)
Key Products: security, armored, steel fireproof, interior & garage doors
International Contact: Mr. Xingui Cheng, General Manager

China Simto Group is a manufacturer of a wide range of products, including doors, leisure products, electric tools, scooters, garden tools, plastic ware, electronic scales, lamps and stainless steel products. The Company is privately held.

It is active in the Chinese window and door market via the production of security, armored, steel fireproof, interior and garage doors. China Simto Group produces these doors in a wide range of styles. For example, the Company’s security doors include the HEXIE, YAJIA, CLASSIC, JUNYUE, PRESIDENT and AUSPICIOUS collections.

Production activities for China Simto Group are carried out at a complex in Yongkang, Zhejiang, China that includes twelve production lines for security doors. The complex comprises workshops occupying an aggregate of 250,000 square meters of space. The Company also maintains a sales network serving customers in 31 Chinese provinces, as well as 580 dealers in China.

TABLE VI-4
WOOD DOOR DEMAND IN CHINA BY TYPE
(billion yuan)

<table>
<thead>
<tr>
<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
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<tr>
<td>Building Construction Expenditures</td>
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<td>¥ wood doors/000¥ construction</td>
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<td>Wood Door Demand</td>
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<tr>
<td>Composite Wood:</td>
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<tr>
<td>Molded</td>
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<tr>
<td>Other</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Solid Wood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% doors</td>
<td>77.8</td>
<td>87.9</td>
<td>93.9</td>
<td>95.3</td>
<td>96.3</td>
</tr>
<tr>
<td>Wood Window &amp; Door Demand</td>
<td></td>
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</tbody>
</table>

“Metal is still the leading material used for residential replacement windows and doors, accounting for 48 percent of total demand in 2009. Demand for metal products in residential improvement and repair applications is forecast to rise 6.5 percent annually to ¥31.7 billion in 2014 in China. More than doors, metal windows are particularly vulnerable to competition from plastic products in replacement applications.”

--Section VII, pg. 125
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Page 7
Other Studies

World Windows & Doors
This study analyzes the world window and door industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (wood, metal, plastic), market (residential, nonresidential), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2751 ............ August 2011 ............ $6300

Wall Coverings
This study analyzes the US wall coverings industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., wall paneling, decorative tile, wallpaper, finished gypsum board), market (e.g., residential, nonresidential, new construction, improvements and repairs) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2759 ............ July 2011 ............ $4800

Precast Concrete Products
US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the $8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

#2746 ............ March 2011 ............ $4800

World Flat Glass
Global flat glass demand will rise six percent yearly through 2014. Gains will be spurred by ongoing robust growth in the Asia/Pacific region, and by recovery in the building construction and motor vehicle industries of North America and Western Europe. Fabricated flat glass will benefit from rapid growth in more expensive products. This study analyzes the 6.1 billion square meter world flat glass industry. It presents forecasts for 2014 and 2019 by market, world region and for 21 major countries. It also evaluates company market share and profiles industry players.

#2715 ............ January 2011 ............ $6200

Windows & Doors
US window and door demand will rise 6.6 percent yearly through 2014. Plastic products will grow the fastest, driven by fiberglass entry doors and vinyl windows. Metal windows and doors will remain the top segment, supported by population growth in the South and West and by efforts in coastal regions to prevent storm damage. This study analyzes the $22.7 billion US window and door industry with forecasts for 2014 and 2019 by material, market and region. It also evaluates company market share and profiles industry players.

#2699 ............ November 2010 ............ $5100

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