

Building Materials



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China manufacturer profiles

Detailed profiles of 21 verified suppliers and contact details of an additional 15 exporters

Product & price trends

Prices and specifications of 82 top-selling export products

Supply centers & market trends

Coverage of leading and emerging supply centers, plus insight into capacity, output and R&D

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BUILDING MATERIALS

Supplier capability in China

China's exports of building materials will continue to be geared primarily toward the Asia-Pacific region in 2009, a move that helped sustain sales last year as orders from the key markets of the EU and the US plummeted.

Customs statistics support this projection. In the first two months of 2009 alone, the Asia-Pacific absorbed nearly \$1.6 billion worth of China-made building materials to account for 50 percent of total sales during the period. Shipments consisted of doors, windows, tiles, flooring, insulation, construction panels and sheets, extrusions, wire netting and wallpaper.

Suppliers are optimistic that orders from the region will remain strong throughout 2009, thanks to the reinvigorated construction industries of certain countries.

In fact, higher government spending for public and civil engineering work has already helped propel South Korea to the top. Last year, the country procured nearly \$860 million worth of building supplies from China to become the single-largest importer globally.

Another market offering strong opportunities for growth is India after the country received a \$3 billion loan from the World Bank. The grant has been allocated for highway, rail, port and housing projects that are part of the national government's eleventh five-year plan.

Amid this focus on the Asia-Pacific, suppliers are also exploring options in South and Central America and Africa.

The following are some of the key trends we see in China's building materials industry:

- Pricing strategies will vary due to current and projected growth threats. Suppliers planning to cut quotes in the next half-year will use the recent upswing on export tax rebates to help prevent price

reductions from drastically eroding margins. Other companies, however, are poised to raise quotes as a way of protecting themselves against possible fluctuation in material costs.

- Product development efforts in the year ahead will target durability, aesthetics and environmental awareness. Companies plan to introduce improved surface treatments, additional shape and color options, and use materials that contain less, or even zero, toxic substances.

- Anticipating continuous orders from the Asia-Pacific, many suppliers will raise capital expenditure in the coming year. Part of the funds will be invested in upgrades to boost manufacturing efficiency, which consequently, is expected to help control outlay.

This report covers the industry's main categories, namely tiles, doors and windows, flooring, paneling and framework, insulation, building supplies, and building compounds.

They are described separately according to the type and quality of materials used, construction and key features.

The discussion also lists the most-common types of products available for every category and the factors that determine pricing and market positioning.

The composition of the supplier pool is likewise explained, with emphasis on the manufacturing and exporting capability of small, midsize and large makers.

The Industry Overview focuses on the major issues affecting production and exports and how companies are coping with these challenges.

To reflect the industry structure, most of the suppliers in this report are mainland China-owned with direct exporting capability. The report also includes companies with Taiwan or Hong Kong investment.

In this report

- 21 in-depth company profiles
- 15 additional suppliers
- 82 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

CONTENTS

INDUSTRY OVERVIEW	7
Supplier summary	
Export statistics	
Main production centers	
Supplier demographics	
Tiles	10
Doors & windows	12
Flooring	16
Paneling & framework	19
Insulation	21
Building supplies	22
Building compounds	25
Supplier survey	27
Export prices, export sales, major challenges, target markets, capacity expansion plans, product trends, efficiency, capability	
SUPPLIER PROFILES	31
Supplier locations	
Industry composition	
Exporter ranking	
Supplier matrix	
Production checklist	
Supplier profiles	
PRODUCT GALLERY	83
Top-selling export products	
ADDITIONAL SUPPLIERS	99
Key products, contact details	

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INDUSTRY OVERVIEW

With orders from North America and the EU waning, China's building materials industry will continue to rely on the Asia-Pacific region to drive exports in the months ahead.

This market focus helped keep sales on a growth track in 2008.

Customs statistics show that revenue from aggregate shipments of doors, windows, tiles, flooring, insulation, construction panels and sheets, extrusions, wire netting and wallpaper rose 25 percent to \$47.3 billion last year. Countries in Asia and the Pacific accounted for 48 percent, with sales surging 31 percent year on year to \$22.4 billion. Among the top importers were South Korea, Vietnam and India.

Aggressive exports to the region helped cushion the blow from shrinking markets, particularly the EU. Its share of outbound shipments slid 4 percentage points from 2007's 22 percent to 18 percent last year.

After surging 86 percent in 2007, the value of door and window shipments to the EU dipped 4 percent in value terms to \$323.3 million.

Sales of insulation and tiles to North America plunged 43 and 51 percent, to \$22.2 million and \$220.3 million, respectively. Figures from the previous year, in contrast, posted a 37 and 61 percent jump.

Slowing exports to these two key destinations hampered overall export growth, which fell sharply from 50 percent in 2007 to 25 percent in 2008.

Early 2009 figures are pointing to a slower year. Total exports between January and February generated only \$3.1 billion, 41 percent lower than revenue from the same two months in 2008. About half of products went to the Asia-Pacific. The EU's share dropped to 15 percent while North America absorbed 12 percent.

All categories registered significant declines in sales. Hit the hardest was building supplies, which saw revenue cut by nearly half to just \$1.7 billion from \$3.3 billion.

Sales of flooring fell 43 percent to \$163.5 million.

Demand projections for the Asia-Pacific, however, remain buoyant. The region's spending on construction activity is expected to continue increasing this year.

To maximize business opportunities, China suppliers are gearing up shipments of building materials for infrastructure and housing projects.

One of their target markets is South Korea, where government expenditure on public and civil engineering works is on the rise. In 2008, the country procured \$857.7 million worth from China each month, making it the single-largest importer in the line worldwide.

Companies are also eyeing Vietnam, as more consumers there are planning to repair or build new homes. Orders are also expected to increase in view of the \$450 million stimulus package, which includes allocations for low-income housing.

Vietnam is the fifth-biggest market for China-made building materials, with monthly shipments valued at \$139.3 million last year.

India, regarded as another key driver of growth, follows closely with \$136.8 million worth of imports a month. The World Bank granted the country a \$3 billion loan for infrastructure spending in December 2008. This will facilitate the implementation of highway, rail, port and housing projects covered in the government's eleventh five-year plan from 2007 to 2012.

Supplier summary

Suppliers surveyed	21
Export sales	\$366.1mn
Export ratio	58%
OEM business	54%
Capacity utilized	69%
Annual R&D spending	\$14.5mn
Full-time employees	14,984

Data: All surveyed suppliers

To expand their client base and help prop up sales, China markets are also cultivating emerging economies in South and Central America and Africa. In fact, combined shipments to these locations more than doubled in 2008, exceeding \$4.5 billion.

Manufacturers are setting their sights on Brazil, South Africa, Nigeria, Venezuela, Colombia and Chile.

Many companies are prioritizing Brazil whose national government is working to support infrastructure investment through its ongoing growth acceleration program.

Suppliers of windows and skylights are banking on trade show participation to touch base with buyers in South and Central America and Africa. Similar to those bound for the EU, models targeting the aforementioned destinations come in European style. But as the designs are meant for the low-end and midrange segments, the frames have thinner widths of 0.8 to 1.4mm. Prices are 20 percent lower.

Roof and wall insulation manufacturers intend to work closely

Major customers

Company	
Fujian Sanyuan	TPV (China); Costco (US)
Jiangyin Hetai	Knauf (Germany); Siam Steel (Thailand); Saewook (South Korea)
Jin Lan	PT Citra (Indonesia)
Nanjing New Kangjia	Nomadic Display (US)
Shanghai Brilliance	Bosch (Germany); Dewalt, SVC, Wal-Mart (US)
Zhangjiagang Elegant	Home Depot (US); Kingfisher (UK)

Changshu Jingcheng Aluminium Co. Ltd

Paneling and framework account for 50 percent of Changshu Jingcheng's annual sales. Products are exported to North America and the Asia-Pacific region.

Two-thirds of shipments are under OEM contracts. The rest consists of ODM designs.

The factory in Suzhou, Jiangsu province, has 108 workers, including four QC technicians.

A team of three is in charge of R&D. About \$100,000 is allocated for the task each year.

The plant covers an area of 4,000sqm. It is ISO 9001:2000-certified

and turns out 40 metric tons of paneling and framework every month by utilizing two-thirds of current capacity.

Exports account for 75 percent of production and generate \$1 million in revenue annually. Growth of less than 10 percent is expected in the next 12 months, during which the Middle East will be the target market.

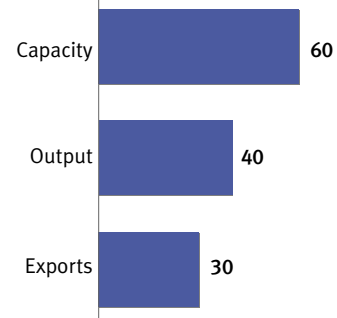
Changshu Jingcheng will hold capital expenditure at current levels. Prices are expected to rise between 5 and 10 percent in the next half-year.

Sales from all products totaled \$9.5 million in 2008.

Profile

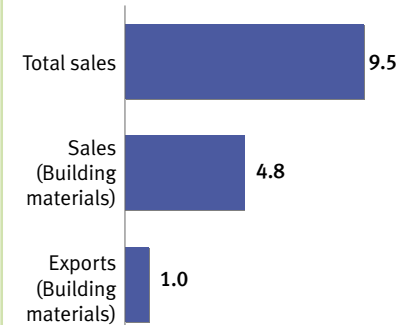
Production

metric tons/mth



Sales

\$mn/year



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Company facts

Year established	2005
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Suzhou (Jiangsu)
Number of factories	1
Factory location(s)	Suzhou (Jiangsu)
Total factory area	4,000sqm
No. of full-time employees	108
No. of R&D/design staff	3
No. of QC staff	4
Annual sales (all products)	\$9.5mn
Annual R&D spending	\$100,000
ISO certification	Yes

Sales & output: Building materials

Annual sales	\$4.8mn
Share of total sales	50%
Annual export sales	\$1.0mn
Total monthly capacity	60 metric tons
Average monthly output	40 metric tons
Capacity utilized	67%
Average monthly exports	30 metric tons
Export ratio	75%
OEM % of exports	65%
ODM % of exports	35%
OBM % of exports	—

Capability

Production checklist

Automated painting line	No
Cutting machines	10
Dryers/drying ovens	—
Punching machines	5
Extrusion machines	3
Polishing machines	4
Mixers/mixing machines	1
Materials with zero or low lead content	No

Exports by product

Tiles	—
Doors & windows	—
Flooring	—
Paneling & framework	100%
Insulation	—
Building supplies	—
Building compounds	—

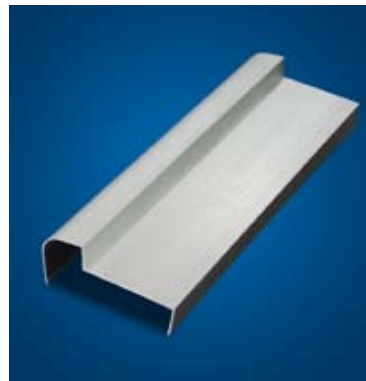
Exports by market

North America	60%
European Union	—
Europe (non-EU)	—
Asia-Pacific	40%
Middle East	—
Other	—

Outlook

- **Export prices**
Increase
- **Export price increase**
5-10%
- **Export sales**
Increase less than 10%
- **Target market**
Middle East
- **Capital expenditure**
No increase
- **Major challenge**
Price competition
- **Export capability**
Widen product range
- **R&D focus**
Improved designs/aesthetics

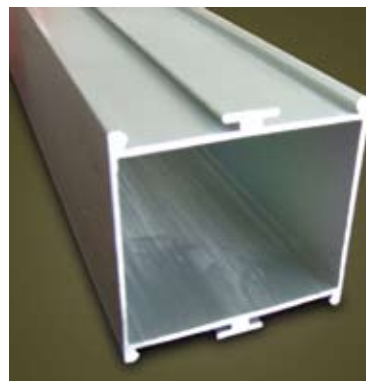
Popular export models



Description: Aluminum profile; 6063T5 aluminum alloy; 0.95kg/m; can be used as a component in hand tools

Paneling & framework

Model	9676
Minimum order	0.5 metric ton
Packaging type	PVC shrink wrap
Delivery time	10 to 15 days
Indicated price	\$2,794.20 per metric ton



Description: Aluminum profile; 6063T5 aluminum alloy; ≤1mm deformation; 221.4sqmm area; 0.8mm thickness; 0.6kg/m; anodized; fewer than three stain points within 20cm; for purification rooms, trailers

Paneling & framework

Model	9656
Minimum order	0.5 metric ton
Packaging type	PVC shrink wrap
Delivery time	10 to 15 days
Indicated price	\$2,708.70 per metric ton



Description: Aluminum profile; 6063T5 aluminum alloy; ≤1mm deformation; 217.17sqmm area; 0.8mm thickness; 0.589kg/m; anodized; fewer than three stain points within 20cm; for purification rooms, trailers

Paneling & framework

Model	9666
Minimum order	0.5 metric ton
Packaging type	PVC shrink wrap
Delivery time	10 to 15 days
Indicated price	\$2,708.70 per metric ton

PRODUCT GALLERY

Tiles



Foshan Nanhai William
(profile page 40)
Model: W162203
Minimum order: TEU
Packaging type: Carton
Delivery time: 7 to 15 days
Indicated price: •
Description: Porcelain floor/wall tile; polished; nonslip surface; 300x300x9.5 to 9.7mm; 7.5kg; CCC



Foshan Nanhai William
(profile page 40)
Model: W162201
Minimum order: TEU
Packaging type: Carton
Delivery time: 7 to 15 days
Indicated price: •
Description: Porcelain floor/wall tile; polished; nonslip surface; 300x300x9.5 to 9.7mm; 7.5kg; CCC



Foshan Nanhai William
(profile page 40)
Model: W162202
Minimum order: TEU
Packaging type: Carton
Delivery time: 7 to 15 days
Indicated price: •
Description: Porcelain floor/wall tile; polished; nonslip surface; 300x300x9.5 to 9.7mm; 7.5kg; CCC



Foshan Nanhai William
(profile page 40)
Model: W162204
Minimum order: TEU
Packaging type: Carton
Delivery time: 7 to 15 days
Indicated price: •
Description: Porcelain floor/wall tile; polished; nonslip surface; 300x300x9.5 to 9.7mm; 7kg; CCC



Fuzhou Sinopower
(profile page 48)
Model: 50DM3011
Minimum order: TEU
Packaging type: Carton, pallet
Delivery time: 15 days
Indicated price: •
Description: Porcelain mosaic floor tile; glazed; surface pattern resembling wood grain, natural stone; versions available: 300x300x7.5mm, 1.15kg; 400x400x8mm, 2.17kg; CCC



Fuzhou Sinopower
(profile page 48)
Model: 50N3045C8050
Minimum order: TEU
Packaging type: Carton, pallet
Delivery time: 15 days
Indicated price: •
Description: Floor tile: 7% water absorption; wall tile: 13 to 17% water absorption; 300x450x8.6mm; 1.733kg; other sizes, colors available; buyers' designs accepted

• Information not disclosed

