

Home Furnishings



August 2009 US\$395

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HOME FURNISHINGS

Supplier capability in China

EXECUTIVE SUMMARY

China's home furnishings suppliers are implementing a number of measures to stimulate demand as the global economic downturn continues to affect overseas shipments adversely.

In the first four months of 2009, export volume fell 9 percent to 1.1 billion pieces while value was down 8 percent to \$2.5 billion year on year.

Companies are facing a gamut of challenges, primary among which is the weakening demand from US and Europe, the major overseas markets.

These areas have also imposed various standards and anti-dumping duties, further aggravating the situation.

In addition, material costs have also begun to rise after a period of relative stability.

In response, makers have begun taking various steps intended to boost sales and ensure commercial viability.

These include increasing the attention given to alternative destinations such as Japan, the Middle East and Russia, and improving product attributes such as appearance and capability.

Suppliers hope to see the positive effects of these measures within the next few months. In fact, all makers interviewed in this report said they plan to boost their capital expenditure in preparation for renewed interest in the home furnishings line.

The following are some of the key trends we see in the industry:

- Suppliers are adopting a cautious approach to the still-uncertain business climate in coming months. As such, prices at most makers were generally not increased in the past three months.

- The majority of companies that raised quotes restrained such hikes to less than 5 percent in an effort to maintain competitiveness.

- To reduce production outlay, most suppliers will be revamping their facilities for better efficiency.

- The US and the EU will still be

the focus of exports from the majority of companies, as these locations are still seen to have the most long-term potential despite the current situation.

- The use of environment-friendly materials and the creation of designs meant to integrate with contemporary interior decoration styles are among the top R&D concerns of most suppliers.

Lamps, bedding, carpets and rugs, window coverings, table linen, and home accents are the main home furnishings exported from China. These are also the scope of this report.

For each product, the report describes the latest designs, materials, finishes and treatments employed by makers. It also highlights the factors that are key in determining the price and quality of low-end, midrange and high-end releases.

Projections for the next 12 months for prices, overseas sales, capacity expansion plans and R&D focus are detailed in the Supplier Survey.

The Industry Overview section looks into the key issues faced by manufacturers of home furnishings, and their methods of coping with such challenges. The latest figures from China customs are also discussed here, in addition to the industry composition and export hubs for each major category.

Reflecting the industry structure, about 87 percent of the enterprises interviewed for this report are mainland-China owned. The rest is backed by Hong Kong and Western investors.

Most are manufacturers with direct export rights, and have at least 10 years of experience in the industry.

The provinces of Guangdong, Zhejiang and Jiangsu are the key manufacturing centers for China-made home furnishings. To represent this accurately, 63 percent of profiled suppliers are from these centers.

In this report

- 30 in-depth company profiles
- 24 additional suppliers
- 129 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

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 each company profile, 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 capabilities of each supplier.

All 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.

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INDUSTRY OVERVIEW

China suppliers of home furnishings are taking a series of steps aimed at boosting sales amid sluggish demand due to the global financial tsunami.

Among the strategies is an increased emphasis on alternative destinations, such as Japan, South Korea, the Middle East, Russia and Brazil. Some companies are also dedicating more output to the domestic market.

The main cause for this is lower demand in the traditional markets of the US and the EU, which have been significantly affected by global economic crunch. Further, both have implemented stricter standards and anti-dumping duties, impacting especially the home accents industry.

Nevertheless, the US and the EU are expected to remain the primary focus in coming months, as they are seen to have the best potential for long-term growth.

Emphasis is also being placed on improving product attributes. The appearance may be modified to suit demand in the lucrative high-end segment, although a number of companies are keeping prices stable or even moving downmarket in order to maintain competitiveness.

In addition, lamp makers are adding value to their models. Many of the latest releases have intelligent features such as the capability to preset power and light intensity. Upcoming models may come with a remote control for added convenience.

Responding to the trend for energy-efficiency, lamps with LEDs are gaining popularity. Products equipped with such parts typically have between 24 and 100 diodes.

The implementation of these varied strategies comes as home furnishing exports for the first four months of 2009 reflect a 9 and 8 percent decrease in volume and value, respectively. From January to April 2008, China customs statistics show that 1.1 billion pieces worth \$2.5 billion were shipped abroad.

Table linen makers, in particular, were significantly affected by the global

financial crisis. In the same time period, volume shrank by approximately 12 percent YoY to 160 million pieces while the value was 9 percent lower at \$146 million than in the previous year.

Similarly, lamp exports were down 6.5 and 19 percent in value and volume, respectively. The first reached \$193 million, while the latter was 33 million units.

From January to April 2009, shipments of curtains were at 135 million pieces worth \$477 million. Both were 9 less than the same period in the previous year.

Likewise, the value and volume of bedding exports in the same time frame dropped by 13 and 8 percent,

Supplier summary

Suppliers surveyed	30
Export sales	\$298.3mn
Export ratio	44%
OEM business	67%
Capacity utilized	40%
Annual R&D spending	\$40.0mn
Full-time employees	16,097

Data: All surveyed suppliers

respectively. The 2009 figures showed 510 million pieces with a total price of \$1.3 billion.

In the artificial flowers segment, 67 million pieces worth \$194 million were shipped in the first four months of 2009. This was 8 and 7 percent less than in the previous year.

Major customers

Company	
Anhui Light	Kaufland, Aldi, Herding, Bettenwelt, Kik Textile (Germany); Netto (Poland, Germany); Target (Poland); JYSK (Denmark, Sweden, Poland); Sears (US); Wal-Mart (Canada)
Anhui Technology	Wal-Mart (US); Carrefour (France)
Canfine	Auchan (France); Tesco (UK); Li & Fung (Hong Kong); Senario (US)
Cnlight	Osram (US); GE (Germany)
Dalian Overseas	Wal-Mart (US)
Hangzhou Xiaoshan Huafeng	Tesco (Korea); Wal-Mart (US)
High Hope	Coop (Spain, Denmark, Italy)
Ningbo ETDZ Victor	Quelle, Pajama (Germany); Melden, Xtrees, New View (US)
Ningbo Homeshine	Carrefour (France)
Qingdao Yinlongfei	Columbia Frame (Canada)
Shanghai Daofu	Wal-Mart (US)
Shaoxing Esther	Macy's (US)
ShuiBao	Target, Atico, Mattel (US)
Wuxi Tianxiu	Wal-Mart, Target, BRU (US); Itouch (Japan); Nemcor (Canada); Baby Nat (Spain)
Zhejiang East	TSG Group (India); Romantex (Israel)
Zhejiang Native	Disney (Germany)
Zhejiang Orient	Wal-Mart, Dollar Tree (US)
Zhejiang Yulong	TJX, Target (US)

Canfine Toys Ltd

ISO 9001:2000-certified Canfine manufactures 80,000 pieces of home furnishings each month, all of which are exported. The line makes up half of total annual sales, which amounted to \$8 million last year.

OEM orders account for 95 percent of shipments, with the rest under the in-house E-Plush brand. The overseas markets are North America, Europe, the Asia-Pacific region and the Middle East.

In coming months, export sales from home furnishings are expected to stay the same. The company is

also holding its capital expenditure at current levels.

Canfine has two factories in Guangdong and Jiangxi provinces with a combined workforce of 2,000. Eighty technicians handle QC inspections.

A 20-member team carries out product development. On average, the company invests 10 percent of revenue in R&D annually. New releases will come in environment-friendly materials.

Besides home furnishings, Canfine offers portable media players, digital photo frames, touch lamps and toys.

Company facts

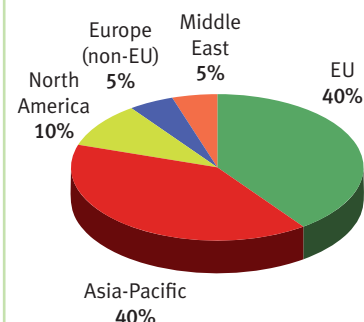
Year established	1991
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Dongguan (Guangdong)
Number of factories	2
Factory location(s)	Dongguan (Guangdong), Ganzhou (Jiangxi)
Total factory area	20,000sqm
No. of full-time employees	2,000
No. of R&D/design staff	20
No. of QC staff	80
Annual sales (all products)	\$8.0mn
Annual R&D spending	\$800,000
ISO certification	Yes

Sales & output: Home furnishings

Annual sales	\$4.0mn
Share of total sales	50%
Annual export sales	\$4.0mn
Total monthly capacity	80,000 pieces
Average monthly output	80,000 pieces
Capacity utilized	100%
Average monthly exports	80,000 pieces
Export ratio	100%
OEM % of exports	95%
ODM % of exports	—
OBM % of exports	5%
Major customers	Auchan (France); Tesco (UK); Li & Fung (Hong Kong); Senario (US)
Other products made	Portable media players, digital photo frames, touch lamps, toys

Profile

Export markets



Sales

\$mn/year



Contact details

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Capability

Production checklist

Cutting machines	—
Sewing machines	1200
Needle detectors	6
Metal-tooling machines	—
Silk-screen printers	—
Injection-molding machines	—
Glass-blowing machines	—
Automated painting line	No
Electric kilns	No
Makes shades in-house	No

Exports by product

Lamps	—
Bedding	100%
Carpets & rugs	—
Window coverings	—
Table linen	—
Home accents	—

Exports by market

North America	10%
European Union	40%
Europe (non-EU)	5%
Asia-Pacific	40%
Middle East	5%
Other	—

Survey

- **Export prices**
Increased
- **Export price increase**
Less than 5%
- **Export sales**
Stay the same
- **Target market**
North America
- **Capital expenditure**
No increase
- **Major challenge**
Stricter overseas standards
- **Export capability**
Shorten design/development time
- **R&D focus**
Environment-friendly materials

Popular export models



Description: Pillow; cotton shear fabric filling; machine- and handmade; embroidered; heart-shaped velboa plush embellishment; radio function; flashing LED lights; 12x12in; 360g; CE

Bedding

Model	CF070700
Minimum order	5,000 pieces
Packaging type	PP bag
Delivery time	60 days
Indicated price	•



Description: Pillow; 100% polystyrene bead filling; machine- and handmade; animal patterns; 12x12in; 120g; CE

Bedding

Model	CF051215
Minimum order	5,000 pieces
Packaging type	PP bag
Delivery time	60 days
Indicated price	•



Description: Pillow; 100% cotton shear fabric filling; machine- and handmade; embroidery and 11in 3D animal motif; 12x12in; 350g; CE

Bedding

Model	CF050218
Minimum order	5,000 pieces
Packaging type	PP bag
Delivery time	60 days
Indicated price	•

• Information not disclosed

Lamps



Cnlight
 (profile page 38)
Model: HL-5222
Minimum order: 500 units
Packaging type: Carton
Delivery time: 15 days
Indicated price: \$16.95
Description: Desk lamp; silver; ABS lampshade and base exterior; iron base interior; aluminum lamp strip; machine-made; uses FPL-22W energy-saving bulb; 160cm height; 34cm width; 6.17kg; CE, RoHS



Cnlight
 (profile page 38)
Model: HL-A5091
Minimum order: 1,000 pieces
Packaging type: Carton
Delivery time: 20 days
Indicated price: \$11.87
Description: Desk lamp; red painted surface; ABS; machine-made; 40 LEDs; 3W power consumption; 2000mcd brightness; rechargeable battery; 39cm height; 29cm width; 1kg; CE, RoHS



Cnlight
 (profile page 38)
Model: HL-A5132
Minimum order: 1,000 pieces
Packaging type: Carton
Delivery time: 15 days
Indicated price: \$6.56
Description: Desk lamp; blue painted surface; ABS; machine-made; uses FPL-13W energy-saving bulb; 39cm height; 18cm width; 1kg; CE, RoHS



Cnlight
 (profile page 38)
Model: HL-B5202
Minimum order: 1,000 pieces
Packaging type: Carton
Delivery time: 20 days
Indicated price: \$6.90
Description: Desk lamp; silver; ABS lampshade and base exterior; iron base interior and spring; aluminum lamp strip; machine-made; uses E27-20 full spiral energy-saving bulb; 42cm height; 21cm width; 3.2kg; CE, RoHS



Cnlight
 (profile page 38)
Model: HL-043
Minimum order: 1,000 pieces
Packaging type: Carton
Delivery time: 20 days
Indicated price: \$8.00
Description: Desk lamp; silver; ABS lampshade and base exterior; iron base interior; aluminum lamp strip; machine-made; uses FPL-22W energy-saving bulb; 48.5cm height; 34cm width; 1kg; CE, RoHS

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