

Assessment of China's Market for Architecture Membrane

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Abstracts

BEIJING, November 20th, 2013 – GCiS China Strategic Research estimates that the domestic market of architectural membrane in China is valued at over RMB 900 Mn as of the year end of 2013, or roughly 6.8 Mn m².

The study finds that the market will continue to grow at above GDP growth rate in the next few years, driven by China's continued rapid development of public infrastructures, primarily in tier-2 cities.

The report features in-depth analysis of the three key membrane products, PVC, PTFE and ETFE membrane and finds that the market is gradually shifting towards higher quality PTFE and ETFE products. The majority of architectural membrane is used in sports structures such as stadiums, closely followed by the transportation structure application mainly from newly constructed and expanding train stations as well as airports. Other key applications of consideration include scenic structures, cultural structures, commercial structures and industrial structures, though growth is expected to be relatively slower in these sectors.

Though government funded projects may take headwind from local government debt burden and China's economic transition, suppliers are generally optimistic about demand for architectural membranes in the coming years. The demand for architectural membranes is already starting to become saturated in tier-1 cities and demand is continually shifting towards tier-2 cities. Even with much higher prices, foreign suppliers are successfully penetrating into the tier-2 cities' large scale projects with significantly better quality products.

About the GCiS China Architectural Membrane Study

This GCiS market study draws on a three month in-depth primary survey of 65 of the market's suppliers, channel players and experts. It is essential reading for any professional needing accurate and detailed strategic information of this market. Major areas covered include: market size and shares, five-year projections, market structure, pricing trends, distribution, an assessment of key suppliers and more.

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APPENDIX I: SUPPLIER PROFILES

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Chukoh Fibers
DEJIA Fabric
Duraskin
Ferarri
Guangdong Yilong Innovative Material Technologies
Heytex
HIRAOKA
Jiangsu VEIK Technology Materials
Kyung In (Korea)
Mehler
Naizil
Saint-Gobain
Seaman Corporation
Shenda Kobond Industrial Textile
Sijja New Material
Sioen
Supertex
Taconic
Taixing Fleet Hi-Tech Material
Walton
Wuxi First Special-type Fiberglass
Zhejiang Xingyida Reinforce Materials
Zhejiang Botai Plastic
Zhejiang Jinda New Materials

APPENDIX II: CHANNEL PROFILES

Beijing N&L Fabric Technology
Canobbio-Asiatex Construction Technology
Hangzhou Tiding Membrane Engineering
Hangzhou Zhihui Membrane Structure
Henan Dayuan Membrane Structure
Hunan Chuang Xin Steel Membrane Structure Manufacturing
KING TENSILE

Kingwolf
Meixiang Membrane Structure Shenzhen
Shanghai Qicai Decoration Engineering
Shanghai TENT Membrane Structure
Shanghai Tianwang Membrane Structure
Shanghai Yanlinzhen Membrane
Shenzhen Huading

LIST OF CONTACTS

Suppliers
Channel Players

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