

Global and China Piano Industry Report, 2012-2013

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Abstracts

Since 2008, the financial crisis, the fall in the birth rate and other unfavorable factors has impacted on major traditional piano consumer markets such as Europe, America and Japan, while China, India, Brazil, Russia and other emerging countries have showed increasing demand for pianos. The global piano production and consumption are transferring from Europe, America and Japan to emerging markets, especially China has become the world's largest piano producer and consumer.

In 2012, China's piano output reached 379,746 units, accounting for 76.9% of the global piano output; in 2010-2012, the piano import volume surpassed the export volume in China, helping China be a leading piano importer in the world.

Based on the supply & demand and the competitive structure in the global and China piano industry, the report makes a profound analysis on market development, brand management and capacity expansion of major domestic and foreign piano manufacturers.

Yamaha Group is one of the most important piano manufacturers in the world, and it focuses on the Japanese market. In recent years, it has performed poorly. In FY2013, Yamaha's musical instrument products generated JPY22.9 billion in the Chinese market, growing by 19.9% year on year and accounting for 8.4% of its total revenue. In accordance with the company's development plan, Yamaha's musical instrument revenue in China will hit JPY36.3 billion in FY2014.

Founded in 1956, Pearl River Piano went public on the Shenzhen Stock Exchange on May 30, 2012. Currently, it acts as the world's largest piano manufacturer. The company has three major production bases for horizontal pianos, upright pianos and wood processing, with the annual output of more than 100,000 pianos. The company owns four piano brands, namely Pearl River, Litemile, Caesar fort, and Beijing-Zhuhai. It

is the first Chinese piano manufacturer whose annual output and sales volume exceed 100,000, and its domestic market share remains at 20% or more. In 2014, when the investment project of the company is finished, its piano output and sales volume will climb to 160,000 units/year.

Hangzhou Goodway Piano is engaged in the manufacturing of medium and high-end pianos, with the designed annual output of 80,000. In 2011, the company exported 48% of the pianos made by it, becoming China's second largest export piano enterprise following Pearl River Piano.

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