

2013Q3 Wind Instrument Industry Analysis Report

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Produced by IAR Team
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1. China Wind Instrument (HS: 9205) Exports from Jan. to October in 2013

Note:

HS Code	Product Name
9205	Wind musical instruments, other than fairground organs and mechanical street organs, the following article hereinafter referred to as "wind instrument".

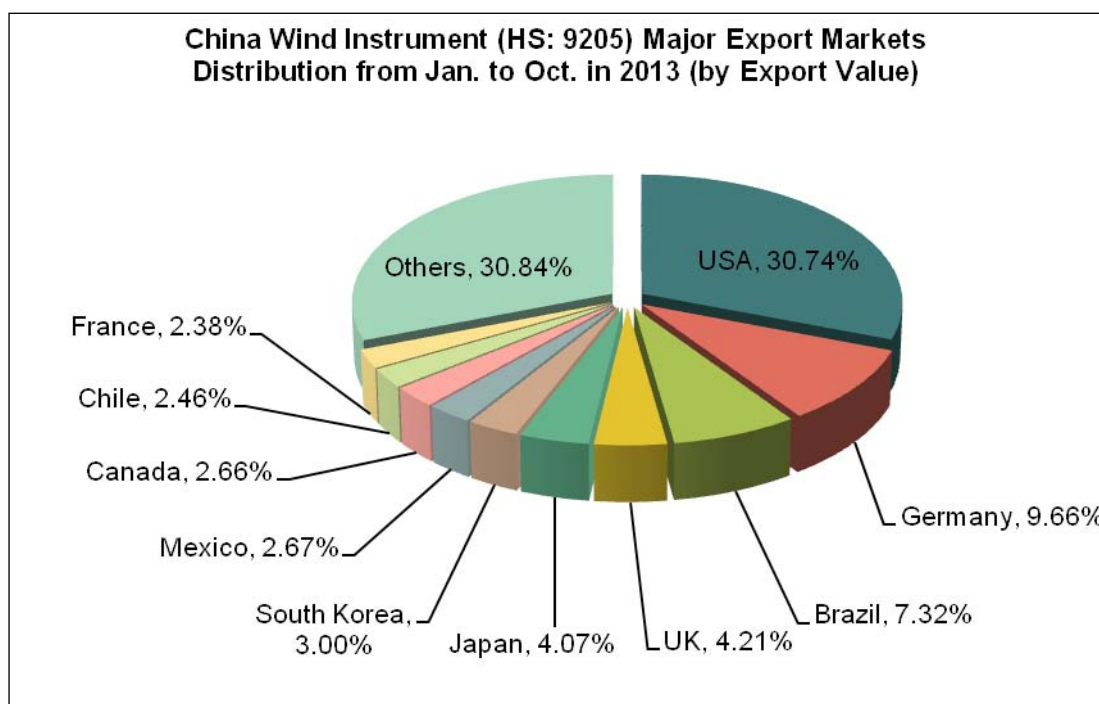
1.1. China Wind Instrument Export Volume and Value from Jan. to October in 2013

Month	Volume (Set)	Value (USD)	Compared to the Same Period of Last Year	
			Volume	Value
January	1,644,605	15,227,645	-7.5%	6.1%
February	1,139,763	12,482,163	63.4%	60.3%
March	1,169,073	9,631,257	-34.2%	-31.4%
April	1,787,546	17,185,987	13.7%	9.5%
May	1,874,443	18,163,198	-6.7%	1.4%
June	1,651,652	16,847,538	-3.1%	-9.6%
July	1,971,297	17,381,444	27.9%	6.2%
August	2,151,031	18,411,588	37.2%	-2.8%
September	1,422,428	14,666,809	-32.4%	-18.8%
October	1,305,478	13,087,729	-42.8%	-5%
Jan. to October Total	16,117,316	153,085,358	-5.4%	-1.6%

The export volume of China wind instrument from Jan. to October in 2013 amounted to 16.117 million sets, with a decrease of 5.4%, while the export value amounted to 153 million US dollars, with a decrease of 1.6%.

1.2. China Wind Instrument Major Export Countries/Regions Distribution from Jan. to October in 2013

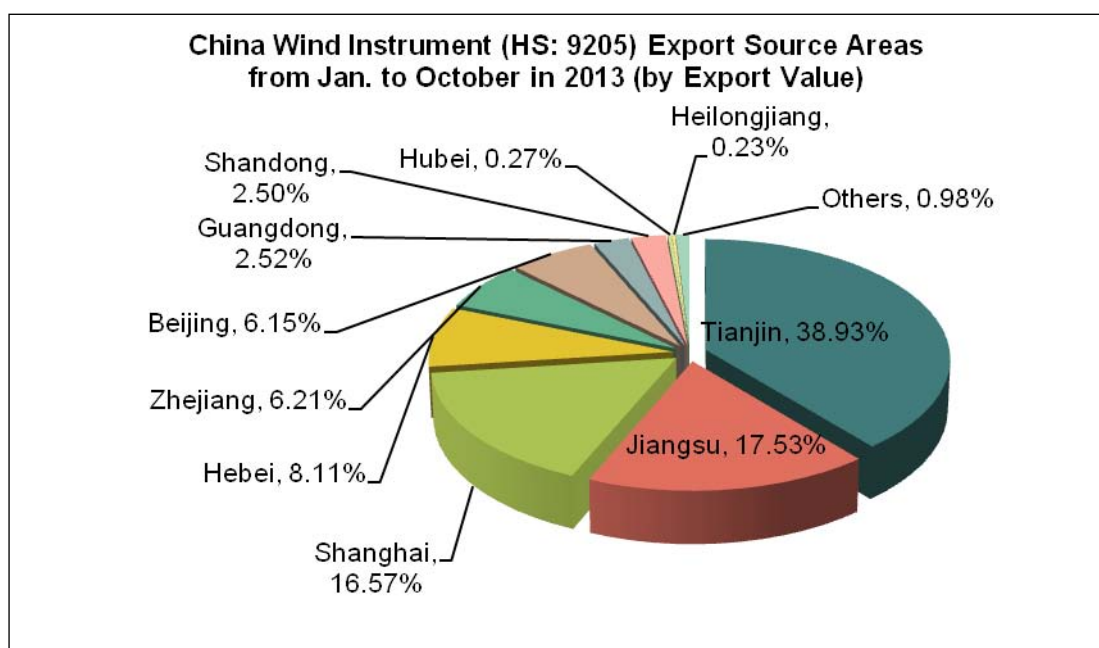
No.	Countries	Volume (Set)	Value (USD)	Compared to the Same Period of Last Year	
				Volume	Value
1	USA	3,605,915	47,053,104	-11.4%	-7.7%
2	Germany	787,791	14,789,658	-22.2%	-3%
3	Brazil	428,739	11,199,144	14.4%	-3.3%
4	UK	245,750	6,445,596	-36.3%	-11.1%
5	Japan	779,206	6,227,993	6.2%	-1.2%
6	South Korea	397,664	4,596,504	-19.7%	8%
7	Mexico	692,322	4,093,760	-20.4%	-28.1%
8	Canada	195,263	4,065,343	-12.3%	8.6%
9	Chile	325,403	3,762,625	-24.9%	6%
10	France	234,291	3,645,658	-17%	-8.2%



China's main export markets of wind instrument were the United States, Germany, Brazil, the UK and Japan from Jan. to October in 2013. The export value to the five countries accounted for 30.74%, 9.66%, 7.32%, 4.21% and 4.07% of our country's total export value of the product respectively and totally accounted for 55.99%.

1.3. China Wind Instrument Export Source Areas from Jan. to October in 2013

No.	Regions	Volume (Set)	Value (USD)	Compared to the Same Period of Last Year	
				Volume	Value
1	Tianjin	1,196,707	59,589,440	-16.8%	-12.5%
2	Jiangsu	4,677,320	26,835,271	-7.3%	12.2%
3	Shanghai	1,898,885	25,360,704	-2.2%	1.4%
4	Hebei	239,955	12,413,204	17.1%	13.5%
5	Zhejiang	5,684,523	9,511,055	-9.1%	3.1%
6	Beijing	68,368	9,414,912	-48.5%	23.8%
7	Guangdong	939,315	3,863,334	-8.4%	-8.8%
8	Shandong	535,906	3,824,932	-21.9%	-13%
9	Hubei	21,379	417,532	-7.4%	102.3%
10	Heilongjiang	320,702	354,954	322.2%	399.1%

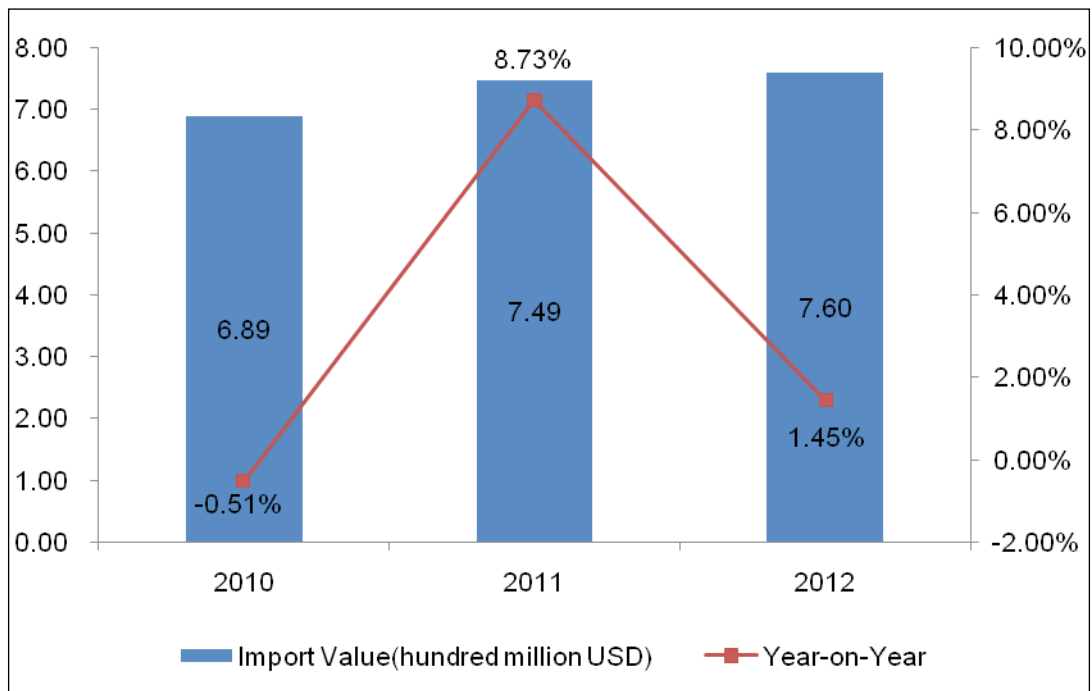


Tianjin, Jiangsu and Shanghai are our country's wind instrument major export source areas. From Jan. to October in 2013, the export value of the above three areas totally accounted for 73.02% of the total export value of the product. Among the top ten our country's export source areas of wind instrument, the export volume and value of Heilongjiang increased the largest rate. The export volume increased by 322.2% year on year, while the export value increased by 399.1% year on year.

(Source: China Customs Network)

2. Global Wind Instrument (HS: 9205) Import Trend Analysis from 2010 to 2013

2.1. The Trend of Global Demand for Wind Instrument from 2010 to 2012



The import value of global wind instrument increased year by year from 2010 to 2012. And the total import value of the three years amounted to 689 million US dollars, 749 million US dollars and 760 million US dollars respectively, among of which, the import value of 2012 increased slightly by 1.45% year on year.

2.2. Global Wind Instrument Major Import Countries/Regions from 2010 to 2012

No.	Import Countries/ Regions	Import Value (Thousand USD)			Import Value Growth Compared 2012 to 2010
		2010	2011	2012	
1	USA	156,155	167,706	181,112	15.98%
2	Germany	79,163	88,944	85,355	7.82%
3	Japan	73,217	72,401	80,764	10.31%
4	South Korea	40,004	44,242	48,486	21.20%
5	France	37,775	48,555	48,407	28.15%
6	UK	25,559	26,721	25,143	-1.63%
7	Canada	19,556	18,851	20,022	2.38%
8	Switzerland	18,180	21,435	19,027	4.66%
9	Brazil	10,797	14,509	17,048	57.90%
10	Austria	16,587	17,367	16,849	1.58%
11	Spain	20,521	21,360	15,599	-23.99%
12	Australia	13,323	19,175	15,262	14.55%
13	Italy	18,480	18,802	15,247	-17.49%
14	Mexico	6,728	7,973	11,733	74.39%
15	Hong Kong	9,651	10,379	11,314	17.23%
16	China	7,807	7,795	9,821	25.80%
17	Taiwan	7,813	9,257	9,249	18.38%
18	Netherlands	9,815	11,143	8,492	-13.48%
19	Malaysia	6,698	8,272	8,448	26.13%
20	Norway	9,933	9,997	7,960	-19.86%

The United States, Germany and Japan are the world's three largest wind instrument import countries from 2010 to 2012. Among the global top twenty import markets in 2012, Mexico's import value of wind instrument increased by 74.39% compared to that of 2010, which was the largest increase, followed by Brazil, the import value of which increased by 57.90% compared to that of 2010.

2.3. Global Wind Instrument Major Import Countries/Regions Market Share from 2010 to 2012

No.	Import Countries/ Regions	Import Value Percentage		
		2010	2011	2012
1	USA	22.68%	22.40%	23.85%
2	Germany	11.50%	11.88%	11.24%
3	Japan	10.63%	9.67%	10.63%
4	South Korea ↑	5.81%	5.91%	6.38%
5	France	5.49%	6.49%	6.37%
6	UK ↓	3.71%	3.57%	3.31%
7	Canada	2.84%	2.52%	2.64%
8	Switzerland	2.64%	2.86%	2.51%
9	Brazil ↑	1.57%	1.94%	2.24%
10	Austria ↓	2.41%	2.32%	2.22%
11	Spain ↓	2.98%	2.85%	2.05%
12	Australia	1.94%	2.56%	2.01%
13	Italy ↓	2.68%	2.51%	2.01%
14	Mexico ↑	0.98%	1.07%	1.54%
15	Hong Kong	1.40%	1.39%	1.49%
16	China	1.13%	1.04%	1.29%
17	Taiwan	1.13%	1.24%	1.22%
18	Netherlands	1.43%	1.49%	1.12%
19	Malaysia ↑	0.97%	1.10%	1.11%
20	Norway ↓	1.44%	1.34%	1.05%

Note: “↑” represents that the indicators listed continued to increase from 2010 to 2012, “↓” represents that the indicators listed continued to decrease from 2010 to 2012.

Judging from the market share, the import value in proportion of South Korea, Brazil, Mexico and Malaysia continued to rise, while that of the UK, Austria, Spain, Italy and Norway continued to decline from 2010 to 2012.

2.4. Global Wind Instrument Major Demanding Countries from Jan. to June in 2013

Major Import Countries/Regions	Import Value of Jan.-June 2013 (thousand US dollars)	YOY
USA	90,634	-1.28%
Japan	47,645	8.66%
Germany	34,408	-6.87%
South Korea	24,863	-1.74%
France	21,906	-0.62%
UK	13,116	32.32%
Canada	10,563	-0.22%
Switzerland	8,452	-7.70%
Australia	8,064	9.42%
Brazil	7,760	-18.30%

From Jan. to June in 2013, global wind instrument major import countries and regions were the United States, Japan, Germany, South Korea, France, the United Kingdom, Canada, Switzerland, Australia and Brazil.

(Source: UN COMTRADE)

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