

Mattress Supports

Industry Analysis Report

2013.07



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Focus Technology Co., Ltd.

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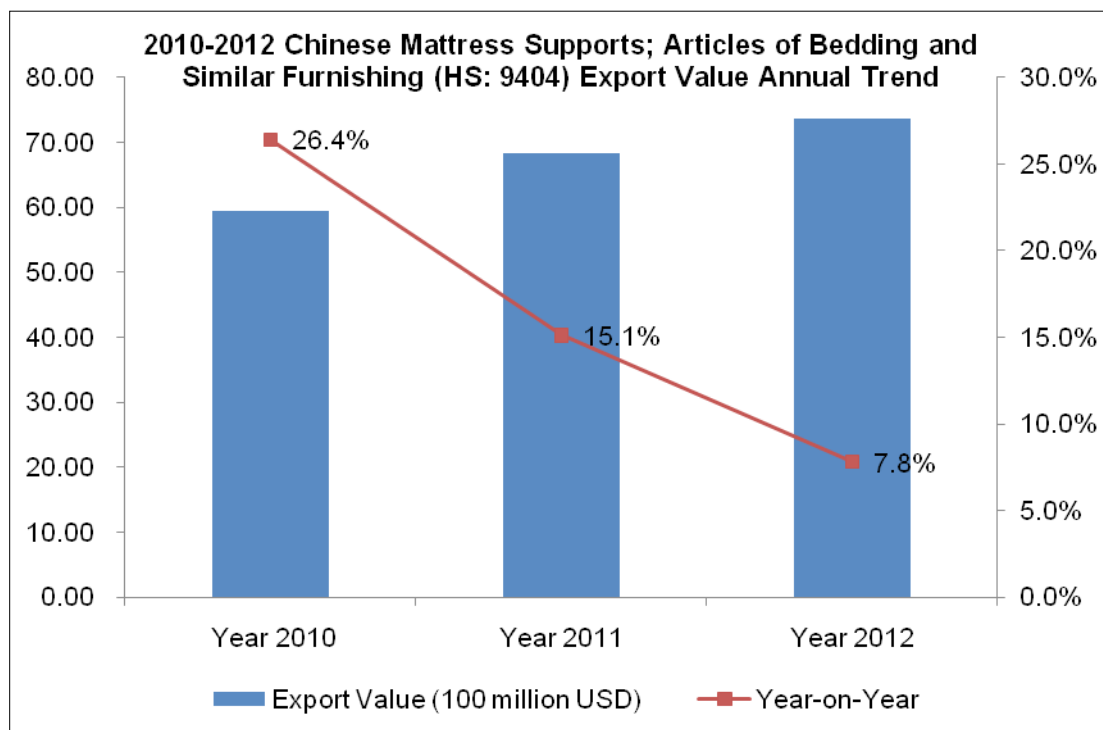
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1. 2010-2012 Chinese Mattress Supports Industry Export Trend Analysis

Note:

HS Code: 9404, Mattress supports; articles of bedding and similar furnishing (for example, mattresses, quilts, eiderdowns, cushions, pouffes and pillows) fitted with springs or stuffed or internally fitted with any material or of cellular rubber or plastics, whether or not covered, hereinafter referred to as “Mattress supports; articles of bedding and similar furnishing”

1.1. 2010-2012 Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Export Trend



2010-2012 Chinese Mattress Supports; Articles of Bedding and Similar Furnishing total exports increased year by year, of which, in 2012 exports totaled approximately \$ 7.372 billion, with an increase of 7.8%.

1.2. 2010-2012 Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Export Market Analysis

NO.	Export Country/ Region	Export Value (USD)			Export Value Increase 2012 Compared with 2010
		2010	2011	2012	
1	USA	2,048,373,658	2,139,042,362	2,310,536,463	12.80%
2	Japan	883,874,478	1,148,188,537	1,217,112,970	37.70%
3	Australia	199,190,809	258,318,314	301,982,387	51.60%
4	Germany	222,596,903	263,291,770	257,343,308	15.61%
5	UK	251,237,038	256,966,051	248,770,937	-0.98%
6	Canada	172,880,360	185,518,697	211,628,716	22.41%
7	South Korea	144,920,669	164,922,848	163,636,813	12.91%
8	Netherlands	118,090,392	138,462,435	141,453,963	19.78%
9	UAE	124,261,892	132,379,018	132,010,666	6.24%
10	Hong kong	92,290,459	105,343,694	128,622,197	39.37%
11	France	139,545,715	134,814,269	127,795,392	-8.42%
12	Saudi Arabia	60,205,570	92,124,607	122,003,198	102.64%
13	South Africa	106,501,352	97,313,103	102,550,765	-3.71%
14	Spain	107,511,061	108,493,362	92,919,567	-13.57%
15	Malaysia	43,792,056	72,146,096	87,150,340	99.01%
16	Chile	52,481,594	67,403,573	77,304,887	47.30%
17	Brazil	26,207,240	51,966,024	76,966,747	193.69%
18	Taiwan	67,551,991	80,650,215	74,759,276	10.67%
19	Poland	44,046,283	58,346,353	70,059,022	59.06%
20	Mexico	48,556,123	80,042,850	68,776,734	41.64%

1.3. 2010-2012 Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Export Market Share Analysis

NO.	Export Country/Region	Export Value in Proportion		
		2010	2011	2012
1	USA	34.49%	31.29%	31.34%
2	Japan	14.88%	16.79%	16.51%
3	Australia ↑	3.35%	3.78%	4.10%
4	Germany	3.75%	3.85%	3.49%
5	UK ↓	4.23%	3.76%	3.37%
6	Canada	2.91%	2.71%	2.87%
7	South Korea ↓	2.44%	2.41%	2.22%
8	Netherlands	1.99%	2.03%	1.92%
9	UAE ↓	2.09%	1.94%	1.79%
10	Hong Kong	1.55%	1.54%	1.74%
11	France ↓	2.35%	1.97%	1.73%
12	Saudi Arabia ↑	1.01%	1.35%	1.65%
13	South Africa ↓	1.79%	1.42%	1.39%
14	Spain ↓	1.81%	1.59%	1.26%
15	Malaysia ↑	0.74%	1.06%	1.18%
16	Chile ↑	0.88%	0.99%	1.05%
17	Brazil ↑	0.44%	0.76%	1.04%
18	Taiwan	1.14%	1.18%	1.01%
19	Poland ↑	0.74%	0.85%	0.95%
20	Mexico	0.82%	1.17%	0.93%

Note: ↑ represents import value accounted for the proportion of China's total exports continued to increase from 2010 to 2012, ↓ represents import value accounted for the proportion of China's total exports continued to decrease from 2010 to 2012

(Source: China Customs)

2. 2013 Chinese Mattress Supports Industry Export Situation

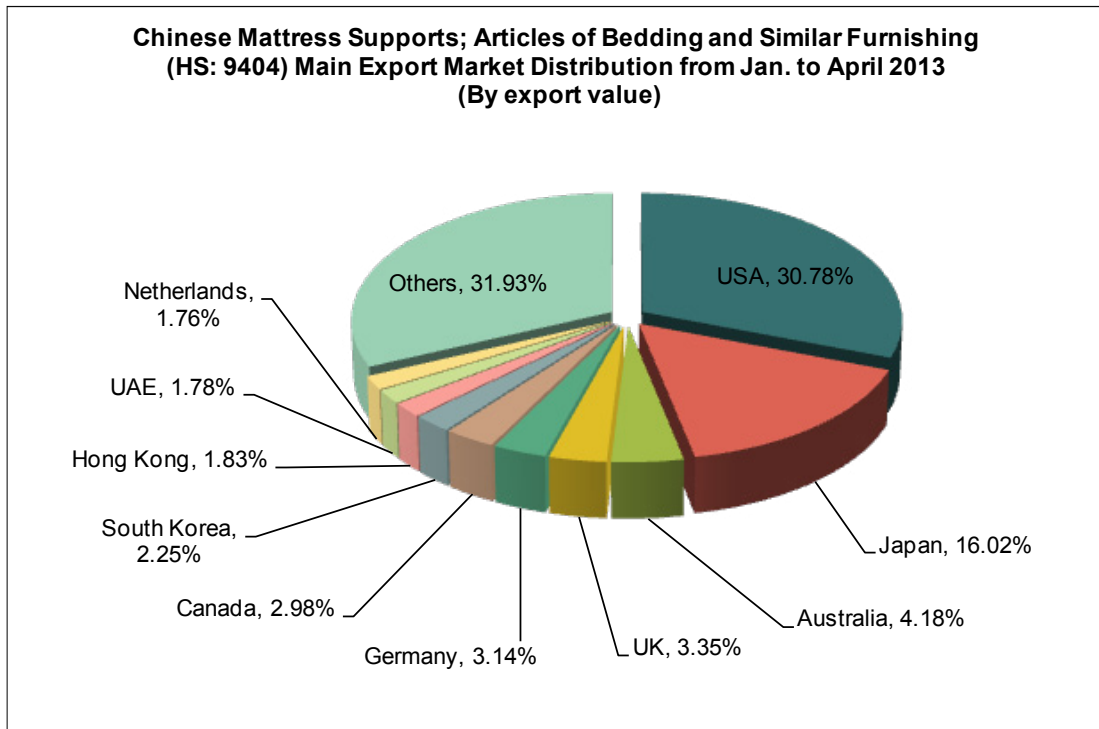
2.1. Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Export Volume and Value from Jan. to April 2013

Month	Volume (-)	Value (USD)	Year on Year	
			Volume	Value
January	86,077,330	661,314,330	-10.3%	14.8%
February	55,372,566	439,205,075	7.1%	53.4%
March	66,918,081	523,793,990	-36.7%	-13.6%
April	82,264,251	644,792,788	-15.4%	3%
Jan.-April Total	290,632,228	2,269,106,183	-17.1%	8.3%

Chinese Mattress Supports; Articles of Bedding and Similar Furnishing export value amounted to 2.269 billion U.S. dollars, with an increase by 8.3% year on year from Jan. to April 2013.

2.2. Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Export Countries/Regions Distribution from Jan. to April 2013

NO.	Country	Volume (-)	Value (USD)	Year on Year	
				Volume	Value
1	USA	98,035,730	698,500,322	8%	6.4%
2	Japan	45,688,443	363,466,249	-55.4%	-3.5%
3	Australia	9,875,929	94,903,021	-0.6%	0.7%
4	UK	9,856,355	76,003,953	1%	1.1%
5	Germany	9,265,691	71,219,048	-13.4%	-7.6%
6	Canada	8,759,776	67,698,120	12.6%	8.8%
7	South Korea	6,483,569	50,946,503	29.4%	27.7%
8	Hong Kong	3,224,373	41,513,094	-51.9%	26.8%
9	UAE	5,120,714	40,314,144	-5.1%	9.9%
10	Netherlands	5,315,697	39,975,259	-10.2%	-15%



Among the top ten export destination countries / regions, our country Mattress Supports; Articles of Bedding and Similar Furnishing export volume to four countries / regions increased from Jan. to April in 2013. From the export volume year on year, there was a larger increase in South Korea (with an increase of 29.4% year on year), while there was a larger decrease in Japan (with a decrease of 55.4% year on year), followed by Hong Kong (with a decrease of 51.9% year on year). From the export value year on year, there was also a larger increase in South Korea (with an increase of 27.7% year on year).

2.3. Chinese Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Export Source Area from Jan. to Dec. 2012

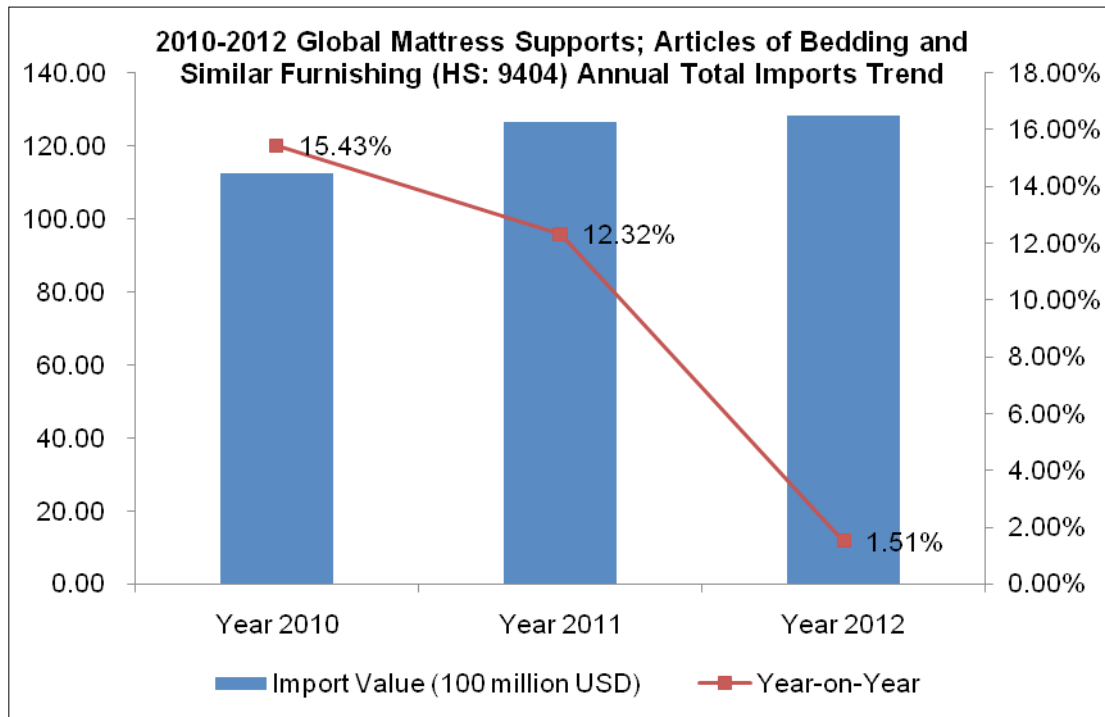
NO.	Region	Volume (-)	Value (USD)	Year on Year	
				Volume	Value
1	Zhejiang	102,634,511	674,284,325	9%	7.9%
2	Jiangsu	90,266,377	593,350,287	0.8%	4.2%
3	Guangdong	20,537,468	355,249,744	-17.8%	33.9%
4	Shanghai	27,292,833	216,066,850	1.8%	2.8%
5	Shandong	26,029,267	184,658,151	0.8%	-3.7%
6	Fujian	5,429,725	72,744,325	46.1%	24.8%
7	Anhui	6,514,727	51,538,169	7.6%	19.5%
8	Liaoning	1,608,270	19,036,431	-26%	13.7%
9	Jiangxi	1,090,296	18,150,231	-42.8%	-5.2%
10	Tianjin	1,288,202	14,777,690	-7.5%	-9.7%

Zhejiang, Jiangsu, Guangdong, Shanghai and Shandong are our Mattress Supports; Articles of Bedding and Similar Furnishing main export source area. the Mattress Supports; Articles of Bedding and Similar Furnishing export volume of the above five provinces accounted for 91.79% of total export volume, and the export value together accounted for 89.18% of total export value. Among Our top ten Mattress Supports; Articles of Bedding and Similar Furnishing export source area, there was the largest increase of export volume in Fujian Province, with an increase of 46.1% year on year. And there was the largest increase of export value in Guangdong Province, with an increase of 33.9% year on year.

(Source: China Customs)

3. Global Mattress Supports Industry Import and Export Situation and Analysis

3.1. 2010-2012 Global Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Annual Total Imports Trend



Global Mattress Supports; Articles of Bedding and Similar Furnishing Total Imports increased year by year from 2010 to 2012, of which, in 2012 import value totaled approximately \$ 12,808,000,000, with an increase of 1.51%.

3.2. 2010-2012 Global Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Demand Countries/Regions Total Imports

NO.	Import Country/ Region	Import Value (Thousand USD)			Import Value Increase 2012 Compared with 2010
		2010	2011	2012	
1	USA	2,574,175	2,607,620	2,714,241	5.44%
2	Japan	1,037,953	1,324,522	1,425,127	37.30%
3	Germany	935,901	1,054,297	970,472	3.69%
4	France	608,504	672,538	631,711	3.81%
5	UK	498,994	512,575	512,201	2.65%
6	Canada	430,767	452,947	487,258	13.11%
7	Netherlands	385,809	442,468	380,901	-1.27%
8	Australia	233,975	282,876	320,315	36.90%
9	Sweden	258,416	301,197	288,596	11.68%
10	Switzerland	238,385	278,483	277,609	16.45%
11	Belgium	262,923	295,402	270,719	2.97%
12	Spain	317,038	329,259	268,421	-15.33%
13	South Korea	172,351	209,238	238,960	38.65%
14	Austria	220,325	246,058	236,873	7.51%
15	Italy	260,648	291,083	232,960	-10.62%
16	Denmark	172,498	197,825	192,346	11.51%
17	UAE	173,134	191,753	186,561	7.76%
18	Norway	159,699	186,899	179,819	12.60%
19	Mexico	120,230	150,058	157,783	31.23%
20	Saudi Arabia	80,952	109,831	150,707	86.17%

The United States is the world's largest Mattress Supports; Articles of Bedding and Similar Furnishing importer, and the import value in 2012 amounted to approximately \$ 2.714 billion, with an increase of 5.44% compared to 2010. Japan and Germany were respectively ranked second and third, and in 2012 import value grew by 37.30% and 3.69% separately. From 2010 to 2012, among the world's top twenty Mattress Supports; Articles of Bedding and Similar Furnishing importing countries / regions, there was the largest increase of import value in India compared 2012 to 2010, with an increase of 86.17%.

3.3. 2010-2012 Global Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Demand Countries/Regions Market Share

NO.	Import Country/Region	Import Value in Proportion		
		2010	2011	2012
1	USA	22.91%	20.67%	21.19%
2	Japan ↑	9.24%	10.50%	11.13%
3	Germany	8.33%	8.36%	7.58%
4	France	5.42%	5.33%	4.93%
5	UK ↓	4.44%	4.06%	4.00%
6	Canada	3.83%	3.59%	3.80%
7	Netherlands	3.43%	3.51%	2.97%
8	Australia ↑	2.08%	2.24%	2.50%
9	Sweden	2.30%	2.39%	2.25%
10	Switzerland	2.12%	2.21%	2.17%
11	Belgium	2.34%	2.34%	2.11%
12	Spain ↓	2.82%	2.61%	2.10%
13	South Korea	1.53%	1.66%	1.87%
14	Austria ↓	1.96%	1.95%	1.85%
15	Italy ↓	2.32%	2.31%	1.82%
16	Denmark	1.54%	1.57%	1.50%
17	UAE ↓	1.54%	1.52%	1.46%
18	Norway	1.42%	1.48%	1.40%
19	Mexico ↑	1.07%	1.19%	1.23%
20	Saudi Arabia ↑	0.72%	0.87%	1.18%

Note: ↑ represents import value accounted for the proportion of world's total import value continued to increase from 2010 to 2012, ↓ represents import value accounted for the proportion of world's total import value continued to decrease from 2010 to 2012.

From the three years of market share, countries of which import value in proportion continued to increase are Japan, Australia, Mexico and Saudi Arabia, countries of which import value in proportion continued to decrease are United Kingdom, Spain, Austria, Italy and the United Arab Emirates.

3.4. 2010-2012 Global Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Export Countries/Regions Total Exports

NO.	Export Country/ Region	Export Value (Thousand USD)			Export Value Increase 2012 Compared with 2010
		2010	2011	2012	
1	China	5,939,623	6,837,199	7,373,105	24.13%
2	Poland	824,496	937,098	895,853	8.65%
3	Germany	538,053	663,241	576,920	7.22%
4	Belgium	419,123	436,694	399,866	-4.59%
5	Denmark	313,469	360,782	398,496	27.12%
6	USA	315,766	343,583	367,245	16.30%
7	Italy	322,266	350,298	326,138	1.20%
8	India	226,003	265,225	278,398	23.18%
9	Mexico	251,375	265,607	272,961	8.59%
10	Netherlands	202,542	245,936	232,996	15.04%
11	Estonia	168,837	211,714	197,640	17.06%
12	Austria	197,737	211,922	180,771	-8.58%
13	Sweden	155,240	175,998	173,325	11.65%
14	France	170,741	159,194	158,662	-7.07%
15	Spain	107,136	115,123	127,982	19.46%
16	UK	118,629	119,737	116,143	-2.10%
17	Lithuania	51,475	88,710	108,144	110.09%
18	Turkey	101,165	105,109	106,999	5.77%
19	Portugal	72,251	100,421	106,470	47.36%
20	Norway	69,443	84,039	95,965	38.19%

China is the world's largest Mattress Supports; Articles of Bedding and Similar Furnishing exporter. In 2012 China Mattress Supports; Articles of Bedding and Similar Furnishing total export value accounted for 19.76% of the world's total export value of the products. From 2010 to 2012, among the world's top twenty Mattress Supports; Articles of Bedding and Similar Furnishing export supply countries, there was the largest increase of export value in Vietnam compared 2012 to 2010, with an increase of 66.73%.

3.5. 2010-2012 Global Mattress Supports; Articles of Bedding and Similar Furnishing (HS: 9404) Main Export Countries/Regions Market Share

NO.	Export Country/Region	Export Value in Proportion		
		2010	2011	2012
1	China ↑	49.67%	50.03%	53.19%
2	Poland ↓	6.90%	6.86%	6.46%
3	Germany	4.50%	4.85%	4.16%
4	Belgium ↓	3.51%	3.20%	2.88%
5	Denmark ↑	2.62%	2.64%	2.87%
6	USA	2.64%	2.51%	2.65%
7	Italy ↓	2.70%	2.56%	2.35%
8	India ↑	1.89%	1.94%	2.01%
9	Mexico	2.10%	1.94%	1.97%
10	Netherlands	1.69%	1.80%	1.68%
11	Estonia	1.41%	1.55%	1.43%
12	Austria ↓	1.65%	1.55%	1.30%
13	Sweden ↓	1.30%	1.29%	1.25%
14	France ↓	1.43%	1.16%	1.14%
15	Spain	0.90%	0.84%	0.92%
16	UK ↓	0.99%	0.88%	0.84%
17	Lithuania ↑	0.43%	0.65%	0.78%
18	Turkey	0.85%	0.77%	0.77%
19	Portugal ↑	0.60%	0.73%	0.77%
20	Norway ↑	0.58%	0.61%	0.69%

Note: ↑ represents export value accounted for the proportion of world's total export value continued to increase from 2010 to 2012, ↓ represents export value accounted for the proportion of world's total export value continued to decrease from 2010 to 2012.

From the three years of market share, countries of which export value in proportion continued to increase are China, Denmark, India, Lithuania, Portugal and Norway, countries of which continued to decrease are Poland, Belgium, Italy, Austria, Sweden, France and the UK.

(Source: UN COMTRADE)

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