

EXECUTIVE SUMMARY CHINA MUSICAL INSTRUMENT INDUSTRY REPORT

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Ministero dello Sviluppo Economico

ITA 
ITALIAN TRADE AGENCY

INTRODUCTION

Objectives

- This research report is an update of the 2018 Edition of the China Musical Instrument Industry Report, and was conducted with the following key objectives:
 1. Provide an update on the high-level overview of musical instrument industry overview, competitive landscape concerning domestic production, sales and distribution of key musical instruments (especially piano and violin), as well as consumer groups in terms of their preferences and purchasing channels.
 2. Identify key market trends, potential barriers and opportunities for Italian manufacturers interested in approaching and/or entering the Chinese market, and provide practical considerations supported by database of potential distributors and musical conservatories.

Conducting Market Research in China and Our methodology

- Generally speaking, conducting market research in China is different and significantly more challenging than it is in developed countries because of 1) the size and diversity of the country; 2) lack of fully reliable centralized / official information databases; 3) constant and extremely rapid change – the whole Chinese economic system is still far from being in equilibrium. Therefore, solid market research work must be based on multiple resources and activities.
- Our methodology leverages a combination of resources / activities such as:
 - All relevant background information from Italian Trade Commission regarding the import and export statistics on relevant product categories, report's priority focuses;
 - Secondary research (in both Chinese and English), which includes multiple sources from China Customs, trade associations, company websites, relevant news articles, other government websites, etc.;
 - Primary research, which includes access to external business network, interviews with industry insiders, private music schools, conservatories, visits to stores for musical instruments, etc.; and
 - Collective China knowledge / sector expertise / market research expertise with hundreds of research projects executed in and outside China.

Format of this report

- The report is organized in such a way as to provide various level of details in different places – executive summary, overviews, and paragraphs in the body of the report, summaries, and appendices; bullet points are used throughout the entire report to make reading easier.

Information Sources

This report is based on information sources detailed below. Therefore, there may be some cases where individual companies had different experience from those found in this report or experience from a different perspective that is not reflected in this report.

- Key sources of information for this report include:
 - All background information from the Italian Trade Commission;
 - Various secondary sources such as China Musical Instrument Association (CMIA), China Light Industry Information Center, China Customs, etc.;
 - Interviews with industry insiders and experts; and
 - Ongoing analysis of all key facts and data collected
- In the report, sources are mentioned for charts, tables and key data; secondary sources include dozens of Chinese sources (news reports, magazines, publications, government statistics, etc.) as well as all companies' websites, press releases from various magazines, etc.
- We mention "Sovereign Analysis" as a key reference; this refers to our elaboration and analysis of qualitative and quantitative data collected throughout the project.
- Ongoing analysis and re-elaboration of all data collected is key to cross-check data and information and identify key trends and industry dynamics.

Note for the report

- Exchange rate: We use the exchange rate of US \$1 = 6.75 RMB, where appropriate throughout this report.
- This report is an update of the high-level overview of the musical instrument industry in China, for easy reading with essential information for Italian musical instrument enterprises operating in or intend to enter the China market; it focuses on:
 - Providing general statistics and information with most up-to-date information; and
 - Capturing the latest key trends and market dynamics.

EXECUTIVE SUMMARY

Industry Overview

- China is currently the largest manufacturer, consumer, and exporter of musical instruments; over 60% of musical instruments sold in the world are manufactured in China. Although this sector has been experiencing fast development in recent years, over half of the instruments produced in China are mid to low level products.
- China's high-end musical instrument sales account for only a small proportion of the total musical instrument market; the high-end segment is dominated by imported brands while domestic production remains focused on the mid-end and mainstream segments.
- The market is comprised of 6,000+ manufacturers; micro and small-sized enterprises represent 96% of western and traditional Chinese musical instruments and relevant manufacturing businesses in China.
- China's musical instrument market is fragmented in terms of the separated retail networks; however, the piano and violin sectors are still dominated by a number of established foreign and domestic players including *Pearl River* and *Yamaha*.
- China's continuously rising demand for imported and foreign branded musical instruments has driven many international players to establish joint production bases in China to manufacture mid-end and mainstream products.
- Both high-end and mainstream market segments are anticipated to experience increasing competition, with the leading domestic and Japanese and Korean brands attempting to move upmarket and continuous upsurges in manufacturing costs in China.
- Overall, the musical instrument sector in China is experiencing a shift towards higher end products and better quality; meanwhile, the uncertain international trading environment and impact from artificial intelligence bring both challenges and opportunities to the sector.

Supply Side Analysis

- There are about 240 above-scale enterprises that achieved a combined turnover of US \$5.8 billion (RMB 39 billion) in 2018. Over half are specialized in production of western musical instruments, 14% produce traditional Chinese musical instruments, 9% produce electric musical instruments, and 19% produce other instruments, parts and accessories.
- Guangdong, Shandong, Zhejiang, Tianjin, Hebei, and Jiangsu remained the top 6 provinces for musical instrument production, accounting for more than 70% of total domestic production value.
- String instruments occupy a small part of the musical instruments sector, around 30%. The town of Huangqiao located in Jiangsu province is specialized in producing violins while Huiyang (Guangdong province) and Zheng'an (Guizhou province) are specialized in guitars. The local governments there offer preferential policies to support the industry development.

- Imported string instruments occupy a small fragment of the market, and the main buyers are music professionals, conservatories and collectors, and so on.
- The major brands in the string instruments segment are *Jiangsu Fengling (Fine Legend)*, *Guangdong Kopak*, *Hebei Jinying*, *Stentor (United Kingdom)*, *Franz Sandner (Germany)* and *GCV (Italy)*, *Suzuki (Japan)*, *Fender (USA)*, and *Ibanez (Japan)*.
- The entire string instruments segment is emphasizing innovation, it not only encourages manufacturers to improve the technique, but also exploring the possibility to apply AI, 5G, 4K and VR in the production and products.
- A large number of leading musical instrument manufacturers and retailers have extended their business lines by incorporating music education, due in part to the teachers' significant influence on students regarding what instruments to purchase.
- Many established domestic and foreign players in the musical instrument market leverage cross-channel sales and marketing strategy, using more than distribution channels in building and maintaining brand awareness among consumers.
- Business-to-Consumer (B2C) ecommerce platforms like *Tmall* and *JD* are increasingly popular among Chinese consumers for purchasing musical instruments; however, high-end musical instrument brands still choose to bypass it due to the rampant counterfeiting problem.

Demand Side Analysis

- The demand for western musical instruments has been growing steadily in the past decade, primarily driven by the improving living standards and growing household income especially in the Tier 1 and 2 cities such as Shanghai, Beijing, Guangzhou, Hangzhou, and Qingdao.
- Specifically, Chinese parents in middle and upper middle-class households are still the major buyers of musical instruments, because they have become increasingly willing to dedicate substantial budget towards the personal development of their children.
- It is estimated that the market size of general art education and training could reach US \$11.9 billion (RMB 80 billion); this drives the demand for musical instruments.
- Key consumer groups of high-end musical instruments (including *Italian* violins, cellos, pianos, harps, and so on) are music professionals, high net worth households and established musical institution such as conservatories and theatres.
- China's demand for high-end and mainstream musical instruments is expected to continue growing, coupled with the central government's continuously increasing investment in musical facilities, cultural enterprises, and music education.

- Consumers are paying more attention to the brand and value for money when they purchase musical instruments; after-sales service has also become a more important purchase consideration for them as well.
- Consumers now tend to prefer individualized, high technology and mid to high end musical instruments to meet their individual needs; distributors usually order a small quantity of different SKUs which diversifies their offerings.

Considerations for Italian Players

- Opportunities exist for *Italian* musical instrument enterprises to access and expand in the China market, especially with the central government's continued endeavor in different fields to promote cultural sophistication and build a cultural superpower.
- *Italian* musical instruments, despite generally being revered as high-end with superior craftsmanship, remain relatively obscure to the majority of the Chinese buyers; *Italian* brands remain a cult favorite among music professionals and instrument collectors.
- Moreover, the intensifying competition particularly in the high-end market segment and relatively nascent stage of musical literacy among Chinese consumers pose further challenges to *Italian* players attempting to penetrate the market.
- Therefore, *Italian* players could consider direct concerted efforts through partnership with reliable local partners with strong sales network and connections with target customers in educational marketing campaigns to strengthen brand identity.

For the whole report, please refer to Italian Trade Agency, Shanghai office:
shanghai@ice.it

APPENDIX A.1 – Key Distributors & Importers of Musical Instruments in China

No.	Company Name (English)	Company Name (Chinese)	Website	Headquarter	Legal Entity	Established Year	Instrument	Contact	Notes
1	Parsons Music	柏斯琴行	www.parsonsmusic.com.cn	Shanghai	WFOE (HK)	1986	Guitars, Violins, Violas, Cellos, Basses, etc.	021-6431 6337	1. The largest musical instrument retailer in China with 100+ retail stores in Tier 1 and 2 cities 2. Works with 500+ distributors across China 3. Proxy brands - Fazioli, Kawai, Toyama, Casio, Roland, Selmer and Bach, etc
2	Acton	雅登音响乐器(上海)有限公司	www.actonchina.com	Shanghai	WFOE (HK)	2002	Piano, Guitars, Basses, Keyboard and drums	021-6233 2626 010-8580 3355 (Beijing)	1. A subsidiary of Tom Lee Group (Hong Kong) 2. Distributes more than 60 sound and musical instrument brands worldwide 3. Has 4 retail stores in China; works with 250 distributors 4. Proxy Brands – Sauter, Carl Johann., Martin, Darco strings, Sigma, PRS, SE guitars by PRS, Mesa, Vox, Wittner, Austrian Audio.
3	Qinchuan Culture Music	河北秦川文化乐器有限公司	www.qinchuan.com.cn	Shijiazhuang, Hebei Province	Private Chinese	1989	Various instruments incl. pianos, guitars, drums, clarinets, guzhens, etc	0311-8699 2326	1. Established 30+ retail chains and music schools in Hebei province and Tianjin 2. Proxy brands - Steinway, Baldwin, Schimmel, Heintzman, Bechstein, Boston, Essex, Taylor, Fender, Julius Feurich, Selmer, Roland, Gibson, etc.
4	Best Friend Music	知音琴行	www.bestfriendmusic.com	Shanghai	Private Chinese	1997	Violins, Basses, Pianos, Guitars and many other instruments	021-5241 3636	1. Proxy brands - YAMAHA, Pearl River, Casio, San Carlo, Blast, Lee Guitars, Roland, etc 2. Operates 20+ retail stores and 12 training schools in Shanghai and Jiangsu province 3. Service centres for Yamaha, Pearl River, San Carlo, etc
5	Hai Zhi Yin Music	合肥海知音琴行	www.hfhzypiano.com	Hefei	Private Chinese	2001	Pianos and guzhens	0551-6262 4886 0551-6262 9818	1. Established over 10 direct retail stores in Anhui province, with 110+ franchise stores in China 2. A top distributor in Anhui with wide city coverage in the province; large market share in piano category 3. Master agent in Anhui for Bechstein, Schimmel, Yangtze River, Young Chang, Kawai, Pearl River, etc.
6	KHS	功学社集团	www.chinakhs.com	Tianjin	WFOE (Taiwan)	2005	Guitars, drums, percussion, pianos, woodwind, reed instruments and accessories	022-6712 4640	1. Established 6 direct stores in Tianjin, Beijing, and Guangzhou; 100+ franchise stores across China 2. Covers instrument sales and training courses 3. Employed 2,000+ staff, and established a factory in Tianjin producing own brands incl. Jupiter, Mapex, Majestic, Hercules, Condor, Azumi, etc 4. Proxy Brands – Sonor, Zildjian, Vandoren, Vic Firth, Remo, Hohner, Aulos, Miraphone, Denis Wick, etc

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No.	Company Name (English)	Company Name (Chinese)	Website	Headquarter	Legal Entity	Established Year	Instrument	Contact	Notes
7	Cadenza Musical Instruments	北京卡丹萨文化艺术有限公司	www.cadenzayueqi.com	Beijing	Private Chinese	1984	Handmade violins, violas, cellos, harps, pianos, etc	010-6641 6075 185 110 34718	1. Has strong connections with multiple music schools and conservatories in China 2. Works with dozens of distributors across China 3. Proxy brands – Klaus Ludwig Clement, Pollmann, Alfred Meyer, Semmliner, Baroco Luthier, etc. 4. Manufactures pianos under its own Cadenza brands
8	Otto Musica	欧德提琴	www.ottomusica.com	Shanghai Beijing	WFOE (Taiwan)	2005	Handmade Violins, violas, cellos and accessories	+86 950-4033-9739 (Shanghai) 010-6950 8253	1. One of the earliest violin sellers in mainland China 3. Proxy brands – Otto Jos. Klier, Aubert, etc 4. Collaborates with National Strings (HK) which carries various string products of European brands such as Liutheria Dimitri Atanassov, and Diego del Valle
9	Ivan Music	千帆乐器有限公司	www.ivan-music.com	Shenzhen, Guangdong Province	Private Chinese	2004	Guitars, Basses, Acoustics, Percussion and other accessories	0755-2306 8406 0755-2376 3621	1. Master agent of a few premium foreign music instrument in China; works with dozens of distributors across China 2. Proxy brands - Taylor, Breedlove, Almansa, Deering Banjo, Elixir, Randall, etc 3. Extensive distribution network coverage across China
10	Guitar Square	吉他平方乐器有限公司	www.guitarsquare.com	Qingdao, Shandong Province	Private Chinese	2005	Guitars, Basses and Accessories	0532-8727 6977	1. Works with 30+ distributors across China 2. Has their own contracted artists, and organizes acoustic guitar competitions in China 3. Proxy brands - Lowden, G7th, Santa Cruz, Lakewood, Larrivee, L.R. Baggs, TUSQ, MONO, Fred Kelly, Clayton, Prohans, Augustine, LuteHole, etc 3. Dealers mostly locate coastal areas in Beijing, Liaoning, Shandong, Jiangsu, Zhejiang, Fujian, Guangdong province
11	Ouge Piano	欧歌钢琴城	www.ougepiano.com	Shenzhen, Guangdong Province	Private Chinese	2001	Mid to high-end Pianos	0755-8379 8982	1. One of the largest piano distributors in China, with 90+ branches across China 2. Carries 70+ international brands including high-end ones such as Petrof, Bechstein, Steinway, Seiler, and Fazioli as well as mid-end ones manufactured in China through joint or OEM production such as Bachendorff and Heintzman 3. Sells 36,000+ pianos every year
12	Song of Songs Music	盛世雅歌琴行	http://www.sosmusic.cn	Beijing	Private Chinese	1997	Pianos, violins, guitars, wind organs, drums, accordions, percussion, etc	010-6406 9939	1. Proxy brands: Steinway, Essex, Boston, Bechstein, Schimmel, Yamaha, W. Hoffmann, Pearl River, Roland, Suzuki, Martin, Jupiter, Fender, etc 2. Established 11 stores in Beijing 3. Offers musical instrument rental and maintenance

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No.	Company Name (English)	Company Name (Chinese)	Website	Headquarter	Legal Entity	Established Year	Instrument	Contact	Notes
13	Tian Mu Music	浙江天目琴行	N/A	Hangzhou, Zhejiang Province	Private Chinese	1992	Pianos, Chinese Traditional Instruments, Guitars and Basses	0571-8883 9893	1. Established 50+ retail locations across China, selling 3,000+ types of musical instruments 2. Offers music education and instrument training services, with 600+ training locations and 200,000+ trained students
14	Jason Harp Center	上海捷森竖琴文化发展有限公司	www.harp.com.cn	Shanghai	Private Chinese	2011	Harps and accessories	021-6473 0108 158 0068 4971	1. Established harp centers in Beijing and Shanghai, offering harp training courses offline and online 2. Also provides rental services 3. Proxy brands – Salvi and Lyon & Healy
15	Ishibashi Music	石桥乐器	www.ishibashi-music.cn	Shanghai	WFOE (Japan)	2011	Guitars, Basses, Drums, Electronic Pianos and Other Accessories and Equipment	021-5307 9132	1. Registered capital US \$3.8 million 2. A Japanese brand formulated in 1938 3. Brands – Gibson, Taylor, Fender, YAMAHA, Cakamine for string instruments, as other worldwide brands 4. Has a Tmall monopolized store selling musical instruments, of which many were imported from Japan 5. Also operates a JD monopolized store selling various second-hand musical instruments
16	Global Sound Network	博声联众电子商务有限公司	www.globalsoundhk.com	Beijing	WFOE (HK)	2008	Violins and accessories	010-8598 5055	1. Master agent of a number of violin brands for Greater China 2. Proxy Brands: Ciro Caliendo, TWI, Codabow, Warchal, Prim, Melos, VLM, Bachmann, Josef Teller, Karl Klier, Old Wood, etc 3. Operates a Taobao store selling various musical instruments
17	Lige Musical Instrument	里歌乐器	www.ligemall.com	Beijing	WFOE (HK)	2005	Violins, Basses, Pianos, Guitars, and many other music instruments	010-5879 1944	1. The first one-stop instruments purchasing company 2. Distributes over 300 brands already 3. Cooperates with various music schools and conservatories as well as orchestras such as China Conservatory of Music and Shanghai Conservatory of Music 4. Offers instrument training and maintenance services
18	DS Musical	帝声专业乐器通路睿达乐器(杭州)有限公司	www.ds-musical.com	Beijing Hangzhou, Zhejiang province	WFOE (Taiwan)	2014	Percussion, electric musical instruments, wind organs, etc	010-8788 8958 010-8788 9958	1. A subsidiary of Dixon Taiwan 2. Works with ~40 distributors across China 3. Proxy brands – Cort, Alvarez, Fernandes, Hamilton, Ovation Guitars, Traveller Guitar, SIT Strings, Antigua, Canopus, Vic Firth, SJC, Gibraltar, etc
19	Haiyin	上海海音乐器有限公司	www.sh-haiyin.com	Shanghai	Private Chinese	1999	Pianos, accordions, percussion, keyboard, etc	021-6318 8518	1. Established 12 retail stores and 7 musical instrument training schools in Shanghai 2. Proxy brands – Yamaha, Hailun, Strauss, Fender, Suzuki, AXL, Roland, Dunhuang, Jinbao, etc 3. Also sells second-hand musical instruments
20	Da Tong Piano	大同琴行	www.dtqh.com	Guangzhou, Guangdong province	Private Chinese	1954	Pianos, guitars, violins, accordions, flutes, drums, etc	020-8383 5150	1. Established art training school in 1995 and its own brand Harrison, with 2,000 sqm flagship store in Guangzhou 2. Carries 50+ proxy brands – Xinghai, Palatino, May-Berlin, Harmony, etc

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No.	Company Name (English)	Company Name (Chinese)	Website	Headquarter	Legal Entity	Established Year	Instrument	Contact	Notes
21	Daqian Pianos	广州大千琴行	www.dqpianos.cn	Guangzhou, Guangdong province	Private Chinese	1999	Pianos, Guitars, violins, percussion, keyboards, wind organs, traditional Chinese instruments, and accessories	020-3882 7663	1. Established 12 retail stores and 7 music training schools in Guangdong and Fujian province 2. Also operates a Tmall monopolized store 3. Proxy brands: Bluthner, Yamaha, Vibra, Baldwin, Schulze Pollmann, Fazioli, Schiller, Irmeler, etc
22	Hongsheng	江西宏声文化艺术发展有限公司	N/A	Nanchang, Jiangxi province	Private Chinese	2003	Pianos, keyboards, violins, guitars, guzheng, wind organs, etc	0791-8833 2160	1. Established 15+ retail stores and multiple music training schools in Jiangxi province 2. Proxy brands: Schimmel, Pearl River, Haessler, Irmeler, Schiller, Jinyin, Fine Legend, Kapok, etc
23	Siming Music	宁波四明琴行	www.nbsmqh.com	Ningbo, Zhejiang province	Private Chinese	1994	Pianos, keyboards, guitars, violins, percussions, and accessories	0574-87265448	1. Established 4 retail stores located in Zhejiang province 2. Offers music and instrument training services 3. Proxy brands – Yamaha, Strauss, Schimmel, Pearl River, Irmeler, Paiste, Jinbao, Fine Legend, Palatino, etc
24	Fuyin Music	大连福音琴行	www.fuyinmusic.cn	Dalian, Liaoning province	Private Chinese	1994	Pianos, keyboards, guitars, wind organs, percussions, and accessories	0411-83704332	1. Established 4 retail stores and a training school with 5 branches located in Dalian, Liaoning province 2. Offers art and instrument training services 3. Proxy brands – Steinway, Boston, Bechstein, W.Hoffmann, Yamaha, Kayserburg, Pearl River, Martin, Taylor, Fender, Gibson, Farida, Recording King, Warwick, Bluthner, Buffet, Selmer, Bach, Mapex, etc
25	Fly Music	飞琴行乐器	www.flymusic.cn	Changzhou, Jiangsu Province	Private Chinese	2003	Guitars, Basses, Keyboards and Accessories	0519-8685 7720 0519-8338 7720	1. Established 3 branches in total locate in Jiangsu and Zhejiang province, and a Tmall monopolized store 2. Cooperate with certain music collages in such as Nanjing University of the Arts 3. Proxy brands – Yamaha, Kurzweil, Korg, Flymusic, Farida, Martin, Gibson, Taylor, Mayson, Lando, Dove, Ovation, Dreambow, Ayers, Kempa, Majic, etc. 4. Also offers instrument lease, training and maintenance
26	Wangzu Music	沈阳旺族琴行有限公司	N/A	Shenyang, Liaoning province	Private Chinese	1994	Pianos, guitars, drums, basses, violins, wind organs, etc	024-2399 6615	1. Established 4 retail stores and 3 music training schools 2. Also operates a Tmall monopolized store 3. Proxy brands: Steinway, Bluthner, Yamaha, Pearl River, Ritmuller, Fender, Squier, Ibanez, Ayers, Kapok, etc
27	Simon Music	杭州珠江三毛琴行有限公司	www.3maomusic.com	Hangzhou, Zhejiang Province	Private Chinese	1981	Pianos	0571-8805 0757	1. Established 4 retail stores in Hangzhou 2. Proxy brands: Steinway, Boston, Kawai, Pearl River, Yangtze River, Simon, Lang Lang, etc 3. Offers music and instrument training, rental, and maintenance services

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No.	Company Name (English)	Company Name (Chinese)	Website	Headquarter	Legal Entity	Established Year	Instrument	Contact	Notes
28	Neuschwan Musical Instrument (NMI)	广州市领弦乐器	www.neuschwan.com	Guangzhou, Guangdong province	Private Chinese	2016	Acoustic guitars and components	020-3696 9695	1. Works with 20+ distributors across China 2. Has 4 authorized Taobao stores 3. Proxy brands: Hanika, Gomra, Lago, Schertler, Philippe Bosset, Univox, etc
29	Zhu Que Music	西安音乐学院朱雀琴行	www.xayxyzqqh.com	Xi'an, Shaanxi province	State-owned	1989	Pianos, string instruments such as violins, guitars, guzhen, erhu, etc	029-8523 3242 029-8525 2558	1. Part of Xi'an Conservatory of Music 2. Offers instrument distribution and maintenance services 3. Proxy brands: Ritmuller, Kayserburg, Pearl River, Strauss, Hailun, Wendt & Lung, Kapok, Dunhuang, etc 4. Makes guzhen under its own brand "Zhu Que"
30	Seven Stars	哈尔滨七星乐器	N/A	Harbin, Heilongjiang province	Private Chinese	2016	Percussion, drums, other electric instruments, and accessories	0451-8432 4947	1. Importer of dozens of foreign brands 2. Works with dozens of distributors across China 3. Proxy brands: C&C Drum, Black Swamp Percussion, Dunnett, Gon Bops, Bergantino, SJC, Acoustic Custom, Trick Drums, AXIS, Crescent, etc
31	Master Music Education	深圳市玛斯特文化艺术发展有限公司	www.mastdoo.com	Shenzhen, Guangdong province	Private Chinese	2010	Violins, strings, and other accessories	0755-8822 8500 0755-8822 8501	1. Established 3 exhibition showrooms and music training schools in Shenzhen specifically for violins and pianos 2. Master agent of GCV Violins in Shenzhen 3. Proxy brands: GCV Violins, FOM, Euro String, etc 4. Operates a Taobao store
32	Huayi Musical Instruments	北京华宜天成乐器进出口有限公司	www.huayimusical.com/	Beijing	Private Chinese	2016	Guitars, Bases, other electric musical instruments and accessories	010-5826 3700	1. Currently works with 7 distributors in Beijing, Hebei, Henan, and Jilin province 2. Master agent of GCV Violins in Shenzhen 3. Proxy brands: Corona, Relish, SJC, Buffalo, KHDK, Istanbul, etc
33	Pastorale Music	深圳市田园琴行	N/A	Shenzhen, Guangdong Province	Private Chinese	1997	Pianos, Guitars, Electroacoustic Musical Instruments	0755-8219 3409	1. Importer of various musical instruments 2. Offers music education and training services 3. Proxy brands: Samick, Yamaha, Kawai, Franz Sandner, Pearl River, Ibanez, Squier, etc
34	HYSZ Music	苏州华韵琴行	www.hysz-music.com	Suzhou, Jiangsu province	Private Chinese	2011	Pianos, string, percussion Instruments, etc	0512-6519 9899	1. Established 7 retail stores in Suzhou and carries more than 20 brands in Suzhou 2. Offers music and art education and training 3. Proxy brands: Seiler, Bernstein, Samick, Pramberger, Xinghai, Yamaha, Pearl River, Kapok, Medeli, Vibra, Ringway, etc
35	Cristofori Music School	歌德音乐学校	www.cristofori.asia	Shenyang, Liaoning province	WFOE (Singapore)	2011	Music instrument education and training	+86 158 4008 4045	1. Mainly offers music instrument training in Shenyang, Chengdu (Sichuan province), and Chongqing 2. Singapore parent company carries violins and pianos under its own brand "Cristofori" 3. Proxy brands: Suzuki, Greg Bennett, etc
36	Dallas	达利斯(天津)商贸有限公司	www.dallasmusic.com.cn	Tianjin	Private Chinese	2012	Pianos, Guitars, drums, violins and accessories	022-82153230	1. Mainly offers music instruments and accessories 2. Has its own brand Dallas 3. Proxy brands: Altus, Jupiter, etc.

37	Home of Music	正一琴行	www.zhengyipiano.com	Qingdao, Shandong province	Private Chinese	2004	Pianos	186 6981 9567	1.Focus on pianos and relevant services 2.Proxy brands: Bluthner, Sauter, Schimmel, Pleyel, Bechstein, Pearl River, etc.
38	Da Yin	大音琴行	www.dayinqh.com	Shanghai	Private Chinese	2001	Pianos, electronic pianos and drums	021-6320 1630	1. Has stores in Shanghai, Wuhan and Beijing 2. Offers musical training as well 3. Proxy brands: Ravenscroft, Yamaha, Pearl River, Hailun, Bechstein, Knabe & Co, Pramberger Young Chang, Steingruber & Sohne, Kawai, Essex, Zimmermann, Petrof, Boston, Samick, Baldwin, Fazioli, Rosler, Hottinghan, etc.
39	Ai Yue	深圳爱乐	www.aiyuego.com	Shenzhen	Private Chinese	2005	Electronic keyboards, drums, guitars, load speakers and accessories	0755-3663 1226	1. In 2016, revenue over RMB 100 million 2. Has a Tmall store as well 3. Proxy brands: Roland, Yamaha, Medeli, Tama, Warwick, Peavey, Orange, Line 6, Ibanez, Fishman, Digitech, Fender, Crush, AKG, Sennheiser, Samson, Meinl, Sabian, etc.
40	Solo	Solo 琴行	www.solomusic.cn	Beijing	Private Chinese	1999	Electronic guitars, guitars, Ukulele, accessories	010-6618 2549	1. Has a Taobao store 2. Proxy brands: Martin, Taylor, Breedlove, Takamine, Gibson, Seagull, Parkwood, Fender, Ibanez, PRS, LTD, Cort, Jackson, etc.
41	Bo Yun	博韵琴行	www.boyunpiano.com	Tianjin	Private Chinese	2009	Pianos and Chinese instruments	022-8388 5162 022-2325 1125 022-2426 8890	1. Has 3 stores in Tianjin 2. Offers musical training and education as well 3. Proxy brands: C Bechstein, W.Hoffmann, Zimmermann, Pleyel, Niedorf, Xinghai, Schumann, Schulze Pollmann, Feurich, Yamaha, Pearl River, etc.
42	Waan Musical	上海维音琴行	www.wyshopping.cn	Shanghai	Private Chinese	2001	Pianos, guitars, electric drums, gu zheng and parts.	021-6288 7895	1. An instruments distributor and wholesaler 2. Offers musical classes too 3. Proxy brands: Roland, Yamaha, Harrodser, Yokoyama, etc.
43	Music Midi	迷笛琴行	www.music-midi.com/	Shanghai	Private Chinese	2013	Guitars, violins and accessories	152 1688 2722	1. Has a Taobao store 2. A large integrated musical instruments distributor and wholesaler 3. Offers musical training too 4. Proxy brands: Carbonado, Casio, Fender, Martin & Co, Yamaha, etc.
44	Zhongyin	中音琴行	www.china-zhongyin.cn	Dalian, Liaoning Province	Private Chinese	2000	Pianos, electric keyboards, guitars and others	0411-8368 3405	1.8 stores in Dalian 2.Proxy brands: Steinway, Kawai, Dokoso, Petrof, etc.
45	Moonlight Art	月光琴行	www.cqyueguang.com/	Chongqing	Private Chinese	2000	Pianos, guitars and accessories.	023-6786 3756	1. One of the largest distributor and retailer in Southwest China 2. Proxy brands: Grotrian, Yamaha, Roland, Kawai, Sauter, Ronisch, Steinberg, Hupfeld, Challen, etc.

Source: Sovereign analysis based on multiple sources including company websites

APPENDIX A.2 – Top Music Schools and Conservatories in China

No.	Institution Name (English)	Institution Name (Chinese)	Website	Headquarter	Established Year	Syllabus	Contact	Notes
1	Central Conservatory of Music	中央音乐学院	www.ccom.edu.cn	Beijing	1950	Musicology, Music Education, Voice and Opera, Piano, Orchestral Instruments and Chinese Traditional Instruments, Music Academic Studies	010-6642 5597	1. Enrolled students numbered ~1,700 with matching number of teaching and administrative staffs of ~700 2. Owns over 500 pianos and a large number of other musical instruments, its educational facilities include an electronic music studio with advanced recording and video equipment, and a violin workshop.
2	The Affiliated High School of Central Conservatory of Music	中央音乐学院附中	www.fuzhong.com.edu.cn	Beijing	1950	Keyboard Instruments, Orchestral Instruments, Chinese Traditional Instruments, Music Composing and Musicology	010-8768 0907	1. Enrolled students numbered ~1000 2. Number of international music competition winners amounted to 459
3	China Conservatory of Music	中国音乐学院	www.ccmusic.edu.cn	Beijing	1964	Performance Arts, Music Composing, Music Theory and Musical Technology	010-6487 4884	1. Has over 300 staff and faculty, more than 120 assistant and full professors 2. Offers music programs for secondary school students, undergraduates, research graduates, adults, as well as foreign exchange students.
4	The Affiliated High School of China Conservatory of Music	中国音乐学院附中	www.msccmusic.com	Beijing	1968	Performance Arts, Music Composing, Music Theory and Musical Technology	010-8582 9992	Top secondary professional music school in Beijing
5	Shanghai Conservatory of Music	上海音乐学院	www.shcmusic.edu.cn	Shanghai	1927	Voice Opera, Orchestral Piano, Music Composing, Music Education, Musicology	021-6431 2000	1. 14 departments and with affiliated Secondary Professional Music School 2. qualified to confer Bachelor's, Master's, and Doctorate degree
6	The Affiliated High School of Shanghai Conservatory of Music	上音附中	www.shmusicsschool.com	Shanghai	1951	Keyboard instruments, Orchestral instruments, Chinese Traditional Instruments, Music Theory, Contemporary Instruments	021-6431 3528	1. Secondary professional music school affiliated with the Shanghai Conservatory of Music 2. Best secondary professional music school in Shanghai
7	Sichuan conservatory of music	四川音乐学院	www.sccm.cn	Chengdu, Sichuan province	1939	Conducting, Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance	028-8543 0202	1. Around 350 professors and associate professors with 16,000 students enrolled at school, with 18 research centres 2. Qualified to confer Bachelor's, Master's, and Doctorate degree
8	Zhejiang Conservatory of Music	浙江音乐学院	www.zjcm.edu.cn	Hangzhou, Zhejiang province	2016	Conducting, Musicology, Music Education, Voice and Opera, Piano, Orchestral Instruments and Chinese Traditional Instruments and Music Academic Studies	0571-2886 7357	1. New music school established recently 2. Has one grand theatre, 3 music halls, 906 instrument rooms, music production center, etc 3. 2,400+ students enrolled at school every year

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No.	Institution Name (English)	Institution Name (Chinese)	Website	Headquarter	Established Year	Syllabus	Contact	Notes
9	Tianjin Conservatory of Music	天津音乐学院	www.tjcm.edu.cn	Tianjin	1958	Music, Dance, Drama, Film and Television	022-6053 1290	1. Department of teaching covers wind and string instrument, piano, accordion, music education, etc 2. Qualified to confer Bachelor's and Master's degree
10	The Affiliated High School of Tianjin Conservatory of Music	天津音乐学院附属中学	www.tjcm.edu.cn	Tianjin	1958	Singing, Chinese Traditional Instruments, Orchestral Instruments, Keyboard Instruments, Contemporary Instruments and Dance Performances	022-2416 0003	1. More than 80 professional teachers & professors, 20 associate professors, 39 lecturers 2. Majors cover keyboard, wind and string instruments, etc
11	Wuhan Conservatory of Music	武汉音乐学院	www.whcm.edu.cn	Wuhan, Hubei province	1985	Composing, Piano and Orchestra, Music Education	027-8806 6354	1. Musical instrument performance is a key major in the conservatory 2. Covers department of piano, wind and string instrument, traditional Chinese instrument, etc 3. The only top independent Conservatory of Music in Central China
12	Shenyang Conservatory of Music	沈阳音乐学院	www.sycm.com.cn	Shenyang, Liaoning province	1958	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance	024-2389 4405	1. Four different campuses in Shenyang 2. Serves around 8,000 students in undergraduate, graduate, and professional studies 3. Best conservatory of music in Northeast China
13	Xi'an Conservatory of Music	西安音乐学院	www.xacom.edu.cn	Xi'an, Shaanxi province	1951	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance	029-8525 1287	1. With 800+ staff 2. Around 3,600 students, of which 350 are master students and 400 are affiliated high school students
14	Xinghai Conservatory of Music	星海音乐学院	www.xhcom.edu.cn	Guangzhou, Guangdong province	1985	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance (Chinese Classical Dance and Chinese Folk Dance) and Singing Performance	020-3936 3636	1. With 660+ staff 2. Around 5,600 students, of which 250 are graduate students and 655 are affiliated high school students
15	The Affiliated High School of Xinghai Conservatory of Music	星海音乐学院附属中等音乐学校	www.fuzhongxh.com	Guangzhou, Guangdong province	1985	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance (Chinese Classical Dance and Chinese Folk Dance) and Singing Performance	020-3724 6575	1. Majors cover piano, wind and string instruments, etc 2. Top secondary professional music school in Southern China
16	Harbin Conservatory of Music	哈尔滨音乐学院	www.hrbcme.edu.cn	Harbin, Heilongjiang province	2016	Music and dance, music theory, Music performance, composing, etc	0451-5859 7677	1. Newly established independent conservatory of music 2. The conservatory was equipped with 300 Steinway & Sons pianos 3. Has a music hall that can hold 800 people, 294 instrument rooms, concert halls, etc

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No	Institution Name (English)	Institution Name (Chinese)	Website	Headquarter	Established Year	Syllabus	Contact	Notes
17	Shanghai Theatre Academy	上海戏剧学院	www.sta.edu.cn	Shanghai	1945	Performance, Directing, Stage art, Film and television, Drama, Drama literature, Dance, etc	021-6248 2920	1. Serves around 2,600 students 2. qualified to confer Bachelor's and Master's, and Doctor's degree
18	The Central Academy of Drama	中国戏剧学院	www.chntheatre.edu.cn	Beijing	1950	Performance, Directing, Stage art, Musical theatre, Peking Opera, Film and television, Drama, Drama literature, Broadcasting and Hosting art, Dance, etc	010-5662 0314	1. Established strategic cooperation with Beijing Star Express Art School which provides art education for teenagers 2. qualified to confer Bachelor's and Master's, and Doctor's degree
19	Beijing Film Academy	北京电影学院	www.bfa.edu.cn	Beijing	1950	Performance, Directing, Sound Art, composing, Musical theatre, Film and television, Photography, Literature, Broadcasting and Hosting art, Dance, etc	010-8204 8291	1. Serves around 3,000 students, and the college is constructing another campus to increase the number of students to 6,000 2. Qualified to confer Bachelor's and Master's, and Doctor's degree
20	Beijing Dance Academy	北京舞蹈学院	www.bda.edu.cn	Beijing	1954	Chinese classical dance, Ballet, ballroom dance, musical theatre, etc	010-6893 5695 010-6893 5854	Serves 2,000 full-time students; 600+ staff
21	Nanjing University of Arts	南京艺术学院	www.njart.edu.cn	Nanjing	1959	Arts, Music and Design	025-8349 8131	Has over 100,000 students, including 8,997 undergraduates, 908 master's degree candidates, 109 doctoral candidates, more than 50 international students, 1,600 registered adult learners and 400 attached middle school students
22	Jilin University of Arts	吉林艺术学院	www.jlart.edu.cn	Jilin	1958	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance and Singing Performance	0431-85618333	Serves around 8,000 students, of which there are 710 master students and ~7,000 undergraduate students
23	Shandong University of Arts	山东艺术学院	www.sdca.edu.cn	Shandong	1958	Piano, Accordion, Wind and String Instrument, Chinese Traditional Instruments, Voice and Opera, Dance	0531-8642 3680	1. music school is one of the key departments 2. Established provincial music culture research foundation 3. Serves 10,400+ full-time students
24	Guangxi University of Arts	广西艺术学院	www.gxai.edu.cn	Guangxi	1938	Fine Arts, Music, Drama, etc	0771-532 3319	1. Serves More than 14,000 students 2. With more than 1,000 staff, including 695 full-time teachers
25	Yunnan University of Arts	云南艺术学院	www.ynart.edu.cn	Yunnan	1959	Drama Studies, Musicology, Study of Art Design, Study of Fine Arts, Dance Studies	0871-624 9078	1. More than 7,000 students and ~600 teachers 2. Significant population of international students on campus
No	Institution Name (English)	Institution Name (Chinese)	Website	Headquarter	Established Year	Syllabus	Contact	Notes
26	Xinjiang Arts University	新疆艺术学院	www.xjart.edu.cn	Urumqi, Xinjiang	1958	Music, Dance, Design, Media, Drama and Film, Culture and Art, etc	0991-255 4104	1. Serves 6,500+ full-time students 2. Keyboard, wind, string, and percussion Instruments are important majors in the Music school

27	Inner Mongolia Arts University	内蒙古艺术学院	www.imac.edu.cn	Hohhot, Inner Mongolia	1957	Music and Dance, Theatre and Film, Design, etc	0471-497 3145	1. Serves nearly 5,000 full-time students 2. The Music school covers departments of opera, wind and string instruments, traditional Chinese instruments, piano, composing, etc
28	School of Arts, Peking University	北京大学艺术学院	www.art.pku.edu.cn	Beijing	2006	Art theory, Film and television, Music, etc	010-6275 1905	1. Serves 400+ full-time students 2. Established Student Orchestra in Peking University
29	The Academy of Music, Shanxi University	山西大学音乐学院	www.aom.sxu.edu.cn	Taiyuan, Shanxi province	1996	Music, Composing, Wind and string instruments, traditional Chinese instruments, keyboard, dance, etc	0351-701 8678	1. Serves 1,000+ full-time students 2. Hires famous professors from other top conservatories of music such as Shanghai Conservatory of Music and international experts as visiting professors
30	School of Arts, Wuhan University	武汉大学艺术学院	www.art.whu.edu.cn	Wuhan, Hubei province	2003	Film and television, Drama, performance, Music, Dancing, Ancient music instrument research centre, etc	027-6875 2945	1. Serves a few hundreds of students 2. Qualified to confer Bachelor's and Master's, and Doctor's degree
31	School of Arts, Communication University of China	中国传媒大学影视艺术学院	www.art.cuc.edu.cn	Beijing	2013	Music Art, Sound and Instrument, Theatre and film, directing, performance, recording art engineering, etc	010-6577 9319	1. Serves 1, 000+ of students 2. Qualified to confer Bachelor's and Master's, and Doctor's degree
32	The Academy of Music, Nanjing Normal University	南京师范大学音乐学院	www.music.njnu.edu.cn	Nanjing	2000	Musicology, composing command, Piano, Vocal, Musical Instrument, Dance, etc.	025-8359 8231	Qualified to confer Bachelor's and Master's, and Doctor's degree
33	Department of Music, East China Normal University	华东师范大学音乐学院	www.music.ecnu.edu.cn	Shanghai	1946	Musicology, Music art language, piano art, sound and instrument art, conducting art, flute performance, violin performance, western music history, music education ,etc	021-5434 5320	1. Serves 600+ students 2. Equipped with 2 music halls, 7 dancing classrooms, 2 digital piano classrooms, 277 instrument rooms, etc 3. Established East China Normal University Orchestra in 2006
34	Dalian Art College	大连艺术学院	www.dac.edu.cn	Dalian	2000	Music, Communication & Media, Film & Television, Fine Arts, Art & Design, Fashion, Culture and Art Management, etc.	0411-3925 6188	1. Nearly 12,000 students 2. Has been granted the 'Excellent Organization Award' by the Ministry of Education
35	Communication University of Zhejiang	浙江传媒大学	www.zjcm.edu.cn	Hangzhou	1978	Broadcast Announcing Arts, Journalism & Communication, Music, Literature, Art & Design, Media & Communication, etc.	0571-8683 2039	1. 13,000 undergraduate students 2. One of the top universities in China in the field of media and communications
36	Sichuan University of Culture and Arts	四川文化艺术学院	www.sca.edu.cn	Mianyang	2001	Music and Dance, Fine Art, Media, Culture & Economic, Vocational Education	0816-6357 889	1. Over 13,580 students 2. Music and Art Design are focused top majors
37	National Academy of Chinese Theatre Arts	中国戏曲学院	www.nacta.edu.cn	Beijing	1950	Chinese Opera, Performance, Director, Music, Theatre Literature, Arts, New Media, etc.	010-6333 6624	1. Around 2,600 students 2. Top theatre school in China 3. Qualified to confer Bachelor's and Master's degree

Source: Sovereign analysis based on multiple sources including company website



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Room 1902 - 1903, The Center,
989 Changle Road, Shanghai 200031
T. 021 - 62488600
shanghai@ice.it
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