

亚洲现代艺术市场

The Contemporary Art Market in Asia 2009/2010

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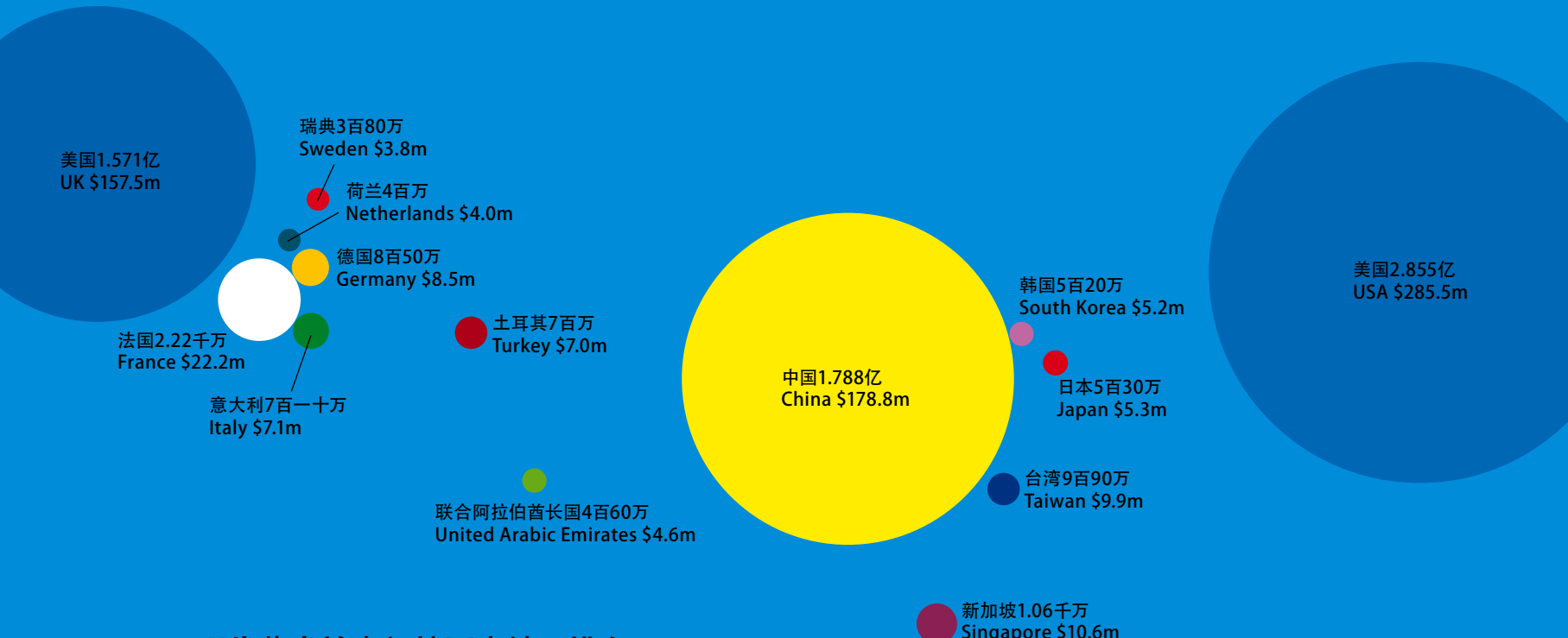


亚洲现代艺术市场

The Contemporary Art Market in Asia
2009/2010

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ART
STAGE
SINGAPORE



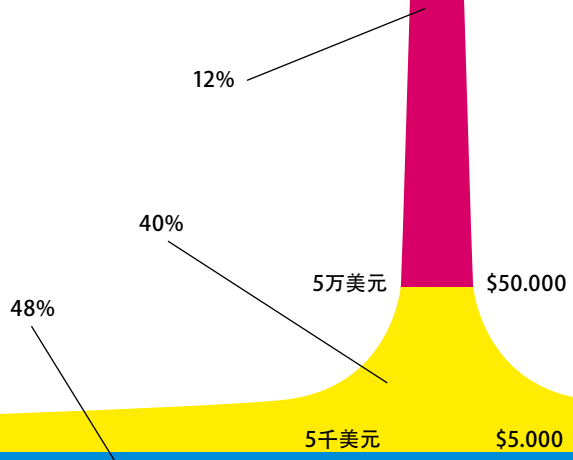
现代艺术拍卖额按国家地区排名
 Contemporary auction sales turnover
 2009/2010 Top 10 by country

其他国家1.93千万
 Rest Of The World \$19.3m

- 7 当代艺术热 / THE CONTEMPORARY ART RUSH
- 9 中国 / CHINA
- 10 中国艺术家的崛起 / Ascension of Chinese artists
- 12 曾梵志 / Zeng Fanzhi
- 15 日本 / JAPAN
村上隆 / Takashi Murakami
- 18 印度 / INDIA
- 19 苏博德-古普塔 / Subodh Gupta
- 21 印度尼西亚 / INDONESIA
- 22 埃·尼欧曼·米斯尼亚迪 / I Nyoman Masriadi
- 24 韩国 / SOUTH KOREA
- 26 弘京泽 / Kyoung Tack Hong
- 28 收藏家洞悉 / COLLECTORS' INSIGHT
阿努帕姆·波达尔先生(印度) / Mr Anupam Poddar (India)
- 29 林运强先生(印度尼西亚) / Mr Deddy Kusuma (Indonesia)
Rudy Tseng先生(台湾) / Mr Rudy Tseng (Taiwan)
- 31 Kim先生(韩国) / Mr Kim (Korea)

2009-2010 当代艺术 按价格分类 Contemporary Art Lots Sold by Price Range

1945年之后出生的艺术家, 2009年11月1日至2010年10月31日之间的拍卖
Artists born after 1945, sales from Nov. 1, 2009 to Oct. 31, 2010



20世纪50年代，欧洲因美国而失去了世界艺术市场的王位。古老的欧洲尚未从此次革命中复原。半个世纪后，另一项革命深刻地改变了艺术和艺术市场的版图：特别活跃的亚洲现代艺术创作和生性倾向于支持同胞的大收藏家的兴起。

随着新千年的到来，创作力量和艺术经济力量在地球东部大幅崛起。中国、印度和印度尼西亚依靠其良性的增长而成为了国际艺术市场的主要参与者。此后，台湾、韩国、新加坡和日本在世界版图上逐步占据了举足轻重的市场地位。它们与中国一起所构成的惊人力量，足以颠覆美国人建立起来的秩序：2009年，亚洲的业务量首次赶超作为龙头老大的美国(亚洲地区为1.55亿美元，美国为1.42亿美元)。

艺术市场的世界版图被打乱了……Artprice(全球艺术市场信息网)为我们就艺术市场的地理迁移做了总结。

In the 1950s, Europe lost its supremacy on the global art market to the United States. That was a revolution from which Old Europe never recovered. Half a century later, another revolution has profoundly modified the geography of the art world and its market: the emergence of a particularly dynamic Contemporary Asian art scene and of collectors willing to support their compatriots.

Since the turn of the new millennium, the centre of gravity of artistic creation and demand has moved very markedly to the East. Underpinned by strong economic growth, China, India and Indonesia, amongst others, have rapidly imposed themselves as major players on the international art market. Today, Taiwan, South Korea, Singapore and Japan have become unavoidable marketplaces on the global art map. Along with China, these markets are generating enough revenue to topple the USA's leadership of the global art market: in 2009 Asia's total auction revenue was

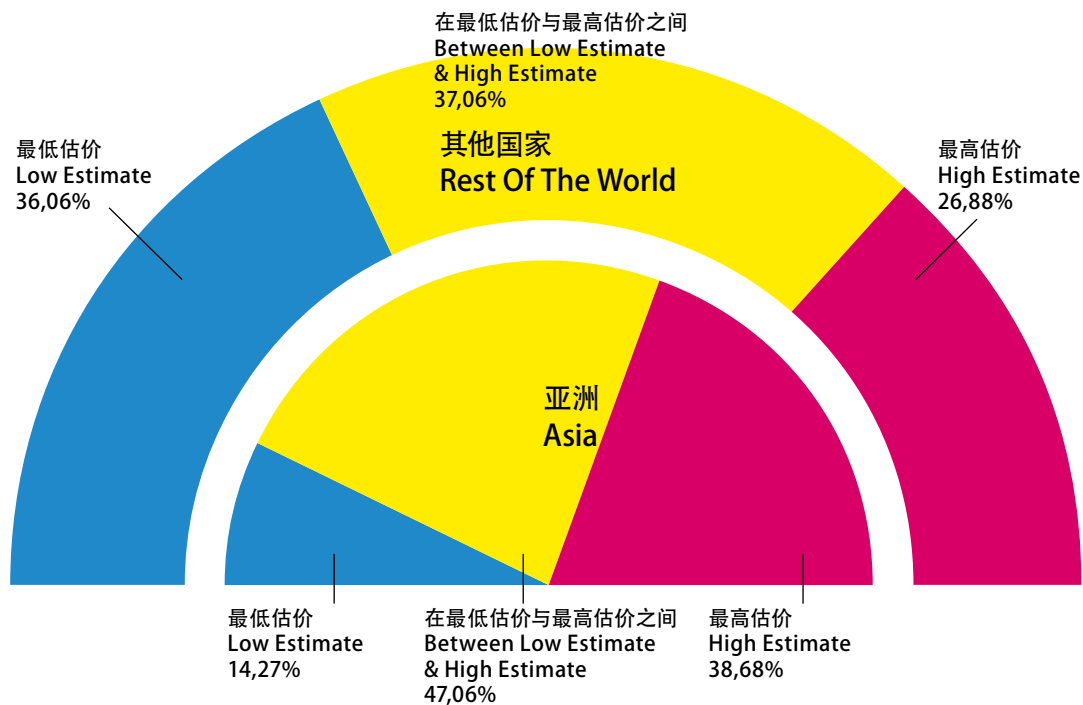
substantially higher than USA's (\$155m vs. \$142m) for the first time ever.

The global map of the art market has radically changed... in this article, Artprice focuses on some of the key trends within the art market's new physiognomy.

最终成交结果与预先估价之比较

Auction records against price estimates

2009-2010



当代艺术热

当代艺术实际上是一个炙手可热的市场。艺术品不再需要经过时间的考验来获得古代或当代艺术家的天文数字价格。进入新千年后，当代创作(1945年后出生的艺术家的作品)的价格持续上升，这有利于冲动投资。当然，收藏家越来越少，特别是在亚洲，但是纯粹的投资者不断加入买家的行列。艺术品供应的更新和全球化的需求不仅改变了亚洲市场，并使之成为了现代艺术市场不容忽视的力量。

证明：2009年当代艺术品拍卖世界排名前10位的拍卖公司中，亚洲公司占据了5个席位。这项排名显示出亚洲区域在金融危机中的抵抗，尽管荣耀的背面是异常的痛苦。实际上，在2008年艺术品价格达到顶峰时，艺术市场，特别是当代艺术品市场，受到了金融危机的波及。

在亚洲，2006/2007年度以及2007/2008年度(一个年度是指从当年的11月至次年的10月)，投机泡沫使拍卖场内的现代艺术品收入飙升了61.5%。然而

THE CONTEMPORARY ART RUSH

市场的下跌如上升一样猛烈：随后的一年(2008/2009年度)，销售利润下降了62.5%。很明显，受到冲击最严重的是高端市场(2007/2008年度和2008/2009年度价格超过百万元的拍品数量减少到1/7)，但是去年高端市场强劲回升，价格超过百万元的拍品数量从7件增加到16件(2008年11月/2009年10月和2009年11月/2010年10月期间)。

Contemporary art is by nature a “hot” market. Its creations no longer need to pass the test of time before fetching the astronomical prices paid for works by Old and Modern Masters. Since 2000, the constant rise in the prices of Contemporary art (by artists born after 1945) has attracted a good deal of speculative buying. Thus, alongside the growing ranks of new and wealthy art collectors, particularly in Asia, demand has been amplified by the speculative appetites of “pure investors”. The expansion of the supply of artistic offer coupled with the globalisation of demand have not only transformed Asian art markets but also imposed Asia as an unavoidable pole of today’s global Contemporary art market.

In accordance with this new reality, in 2009, 5 of the world’s 10 largest auction houses for Contemporary art sales (by revenue) were Asian. This fact also reflects the astonishing resistance of the Asia zone through

the recent crisis, despite having experienced a particularly sharp meltdown when Contemporary art prices dropped from their peak in 2008 after being contaminated by the global financial and economic crisis.

In Asia, the speculative bubble had swelled revenue totals from Contemporary art in Asian auction rooms by 61.5% between 2006/2007 (Nov-Oct) and 2007/2008 (Nov-Oct). But, the fall was just as sharp as the previous ascension with revenue totals dropping 62.5% the following year (2008/2009). The high end of the market was clearly the worst affected (the number of 7-figure dollar results was divided by seven between 2007/2008 and 2008/2009) but it began to recover the following year, rising from 7 to 16 (between Nov. 2008/Oct. 2009 and Nov. 2009/Oct. 2010).

中国

排在美国之后的全球第二大经济实体中国于2001年加入了世贸组织。此后，外国拍卖行纷纷抢占这片新的黄金市场，以便在香港举行拍卖(苏富比拍卖，佳士得拍卖，英国邦翰斯拍卖，巴黎艾/德拍卖)。

在2005年创下价格超过百万元以上的首批中国当代艺术品，其价格在2007年加速飙升。2007年是世界艺术市场具有历史意义的一年，因为中国以其实力震惊了全世界，并成为了世界第三大艺术品拍卖市场，排名在法国之前。

中国惊人的表现使中国当代艺术品价格指数在2004年到2008年期间上升了500%，直到世界艺术市场受到金融危机冲击后才偃旗息鼓。此外，2008年10月和11月拍卖时，香港是第一个遭受金融危机负面影响的市場。第一个明显征兆是佳士得拍卖和苏富比拍卖的当代和现代亚洲艺术品的流拍纪录(分别达到35%和43%，而通常为9%到14%)。2008和2009年间，中国失去了当代艺

术销售利润的63%。

世界艺术市场，特别是中国现代艺术高端市场，严重萎缩。冲动投资不再，全世界的艺术玩家对顶级敏感作品出手谨慎。实际上，中国售出的当代艺术品的均价已从2008年第1季度的65500美元下跌到2009年第1季度的26800美元。

2009年，当欧洲和英国市场倾其所能来安抚竞买人，使价格回升时，中国市场却还在继续赶超世界其他市场。2008年中国艺术销售利润(古董除外)比世界市场高出7.8%，而2009年末则要高出17%以上。三大拍卖行：保利拍卖、中国嘉德和北京匡时，实现了一半的销售利润(接近4亿美元)。此外，佳士得拍卖和苏富比拍卖的香港分部的年度收益为2亿美元。更令人惊奇的是，中国拍卖行在金融危机时期售出的当代作品与快速发展时期时一样多。为了取得这样的收益，它们懂得如何迅速适应经济环境，提供投机性略低的当代艺术作品。

CHINA

China, the world's second economic power behind the United States, joined the WTO in 2001. Since then, European auction houses have rushed to this new Eldorado setting up branches in Hong Kong (Sotheby's, Christie's and Bonhams).

The first 7-figure auction results for Contemporary Chinese art were generated in 2006. By 2007, their number had substantially increased (from 9 in 2006 to 76 in 2007). Indeed, 2007 was a historic year for the global art market as it marked China's accession to the top three marketplaces by auction revenue in the world, relegating France to fourth place.

The astonishing prices recorded – raising the price index for Contemporary Chinese art by 500% from 2004 to 2008 – quickly shrank back when the market was hit by the global financial crisis. In fact, Hong Kong was the first marketplace to feel the chill winds of the crisis at its October and November sales in

2008. The first palpable signs of the new climate were the high unsold rates recorded at Christie's and Sotheby's *Modern & Contemporary Asian Art Sales* (35% to 43% vs. 9% to 14% normally). China lost 63% of its auction revenue from Contemporary art between 2008 and 2009.

The global art market contracted very severely, particularly at the high end of the Contemporary Chinese art market. With speculative buying almost immediately withdrawing from the arena, it quickly became clear that offering very expensive and price-sensitive works of Contemporary art at auction was not a good idea. As a result, the average price of Contemporary works sold in China fell from \$65,500 in the first half of 2008 to \$26,800 a year later.

In 2009, while the US and UK auction houses did all they could to reassure bidders and stabilise the market, the Chinese market was already well on the road to recovery - at a faster pace than anywhere else. By the end of 2009, the total revenue from

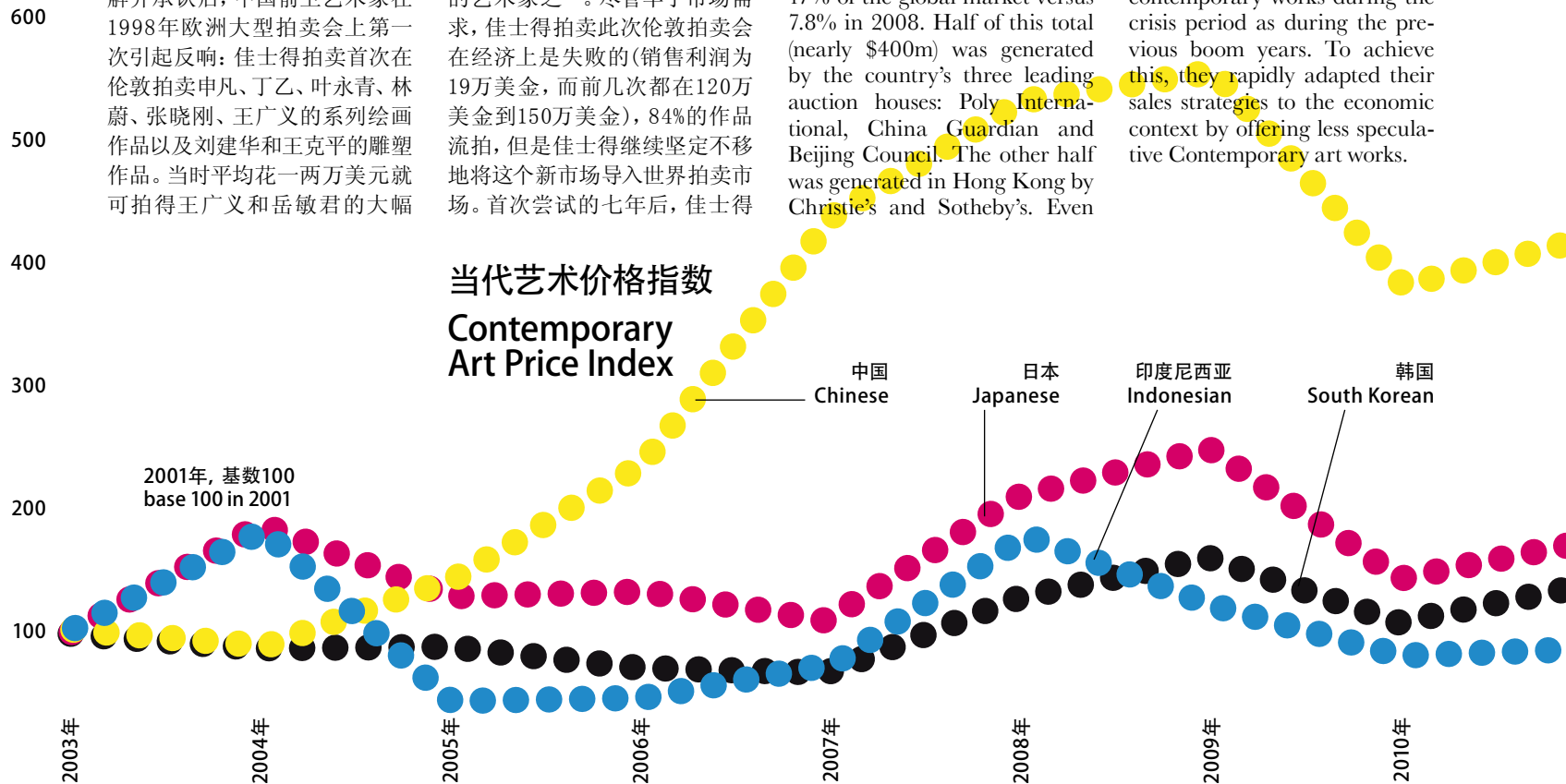
中国艺术家的崛起

在被全世界艺术品爱好者了解并承认后，中国前卫艺术家在1998年欧洲大型拍卖会上第一次引起反响：佳士得拍卖首次在伦敦拍卖申凡、丁乙、叶永青、林蔚、张晓刚、王广义的系列绘画作品以及刘建华和王克平的雕塑作品。当时平均花一两万美元就可拍得王广义和岳敏君的大幅

作品，而今他们是市场行情最高的艺术家之一。尽管早于市场需求，佳士得拍卖此次伦敦拍卖会经济上是失败的(销售利润为19万美金，而前几次都在120万美金到150万美金)，84%的作品流拍，但是佳士得继续坚定不移地将这个新市场导入世界拍卖市场。首次尝试的七年后，佳士得

Fine Art sales in China (excl. antiques) represented more than 17% of the global market versus 7.8% in 2008. Half of this total (nearly \$400m) was generated by the country's three leading auction houses: Poly International, China Guardian and Beijing Council. The other half was generated in Hong Kong by Christie's and Sotheby's. Even

more surprising, the Chinese auction houses sold as many contemporary works during the crisis period as during the previous boom years. To achieve this, they rapidly adapted their sales strategies to the economic context by offering less speculative Contemporary art works.



拍卖不再在伦敦而是在香港组织中国当代艺术品拍卖会，成交价格首次比估价高出十倍。实际上，2005年11月27日，中国创作的新星们冉冉升起，比如岳敏君的作品《轰轰》以430万港币(约合55.47万美元)成交，而估价为35万到45万港币。当同一作品在2008年5月24日的拍卖会上(还是佳士得拍卖香港分部举行的拍卖会)重新拍卖时，它再次大大超出了上一次的记录，落槌价飙升至约合615万美元(4800万港币)。

2005年至2008年间，中国当代艺术品的拍卖价格炒作惊人，达到六七位数，2006年中国当代艺术品的全球销售利润翻了十倍，之后竞争更加激烈...2006年，张晓刚、岳敏君和陈逸飞三人联手创造了四件价格超过百万美元的拍品，而截至到2007年，他们共有44件作品拍卖价格超过百万美元！

2007年全球艺术市场信息网编制的当代艺术家100强中有36位中国艺术家(根据拍卖销售利润排名)。依靠不断增长的国内需求和被艺术家的爆炸性行

情所吸引的国际需求(2001年到2007年，中国当代艺术的行情暴涨了780%)，令人难以置信的流星张晓刚超越了杰夫·昆斯(Jeff Koons)，占据了排名的第二位！张晓刚并未止步不前。次年，他的作品《血缘：大家族系列3》以542.5万美元的价格成交。创造这项拍卖记录的是一幅著名红色线条(既是联系也是象征性断片)穿越的灰暗布景。这项记录是在拍卖Estella的藏品时，于2008年4月9日在苏富比拍卖香港分部创造的(售出了90%的拍品)。次年，曾梵志充满阳光和忧虑的双连画以高出300万美元的价格突破了此项百万元以上的记录。

Ascension of Chinese artists

Nowadays known and recognised by art enthusiasts throughout the world, the Chinese avant-garde received its first significant coverage at a major European auction sale in 1998 when Christie's London offered a panoramic of works by Shen Fan, Din Yi, Ye Yongqing, Lin Wei, Zhang Xiaogang, Wang Guangyi as well as sculptures by Liu Jianhua and Wang Keping. At that time, large format works by Wang Guangyi and Yue Minjun could be acquired for 10 to 20 thousand dollars on average. Today these artists are among the most expensive signatures on the global art market. Although that sale was somewhat premature vis-à-vis the demand (84% of the works remained unsold) it nevertheless represented a decisive introduction of this new market into the global auction landscape. Seven years later, Christie's started selling Chinese art on a regular basis in Hong Kong where the same artists be-

gan to fetch massive prices, often dwarfing their pre-sale estimates by at least 10 times. In fact, on 27 November 2005, the new stars of Chinese artistic creation suddenly found themselves subject to very strong bidding: Yue Minjun's *Gweong-Gweong* fetched roughly \$554,700 (HK\$ 4.3 million) against a pre-sale estimate of HK\$ 350,000 - 450,000. When the same work was offered for sale on 24 May 2008 (again at Christie's Hong Kong), it added yet another zero to its pre-sale estimate by fetching the equivalent of \$6.15m (HK\$ 48m).

Between 2005 and 2008, speculative buying was impressive. Contemporary Chinese art started fetching 6 and 7-figure results... and the race continued in top gear with the trio Zhang Xiaogang, Yue Minjun and Chen Yifei generating forty-four results above the million-dollar line in 2007 compared with just four the previous year!

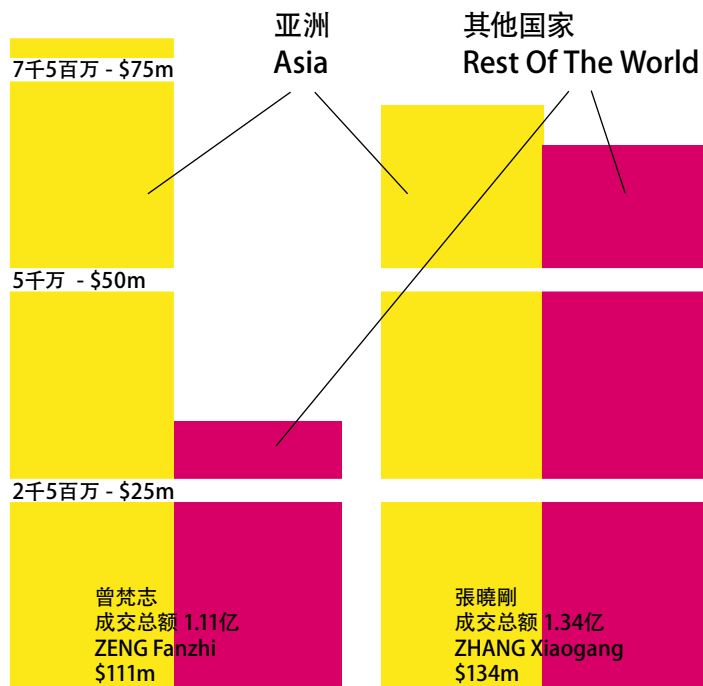
In 2007 China already had 36 artists in Artprice's global Top 100 Contemporary Artists by auction revenue. Fuelled by ra-

曾梵志PK张晓刚

ZENG Fanzhi

Versus ZHANG Xiaogang

2006-2010
按各地区拍卖额排名
Auction Turnover
Breakdown by Region



pidly growing national demand and an international clientele eager to invest in artists with rocketing prices (the price index for Contemporary Chinese art rose 780% between 2001 and 2007), Zhang Xiaogang found himself in the ranking's second position ahead of Jeff Koons! But Zhang Xiaogang didn't stop there. The following year (9 April 2008) his *Bloodline* painting (*Big Family No.3*, a sombre portrait with its famous red line symbolising both a link and a rupture) fetched his auction record of \$5.425m at the Sotheby's Hong Kong sale of the Estella Collection (90% of lots sold). Just a month later, however, this multi-million dollar record was substantially beaten (by \$3m) by a bright and yet disturbing diptych signed by another Contemporary Chinese artist: Zeng Fanzhi.

Zeng Fanzhi

In the spring of 2008, auction records were still frequent occurrences as the contamination of the art market by the global financial crisis did not kick in until the autumn. On 24 May 2008, Christie's hosted its Asian Contemporary Art evening sale in Hong Kong with high hopes. The sale's top lot was a diptych entitled *Mask series 1996 No.6* by Zeng Fanzhi depicting eight masked figures against a yellow background. The work elicited fervent bidding and a hammer price equivalent to \$8.6m, generously tripling its pre-sale high estimate and setting a new world record for a Contemporary Chinese artist! Behind Zeng Fanzhi, the best results of the sale were generated by two Yue Minjun paintings and three works by Zhang Xiaogang.

In fact Zeng's *Mask series* – the

曾梵志

世界艺术市场是在2008年秋季才受到突如其来的世界经济危机的影响，所以2008年春天仍利于创造记录。5月24日，佳士得拍卖在香港举行《亚洲当代艺术》夜场拍卖。拍卖会最吸引人的部分是曾梵志的《面具系列1996 No.6》双连画。这幅黄色背景上八个带面具的人物画册比高额估价翻了三倍，最终以等值860万美元的价格成交。它创下了中国当代艺术家的世界纪录！紧随曾梵志之后，成交价最高的是岳敏君的两幅作品，然后是张晓刚的三幅作品。

2007年艺术家曾梵志获得最高评价的作品《面具系列》的行情开始启动，并在香港首次成为价格超过百万元的拍品。此后，伦敦和纽约的拍卖场成为了曾梵志高端市场的追随者。需求诚然是国际性的，但他的作品在中国市场的地位也相当稳固。他三分之一价格超过百万元的拍品纪录都是在中国创造的。

2008年人们对拍卖市场失去兴趣，而这朵中国当代艺术奇葩也未能幸免。于是佳士得拍卖希

望通过介绍曾梵志在著名的《从群众中来，到群众中去》来重现六个月前《面具系列1996 No.6》创造的成绩，这部作品诞生于面具系列之前，是于1993年创作的“历史”作品来。这件作品的估价保密，但是当代艺术之星在当晚没有遇到任何愿意出价几百万的买家……全世界都在争夺面具系列的雕版作品，可以一万美元以内的预算在上海、香港、汉城、伦敦或巴黎购得艺术家的单张作品。

曾梵志的风格从2004年开始彻底转变。环境成为了新的灵感源泉，无论是风景画和还是人物画，都被狂乱的笔触擦伤。收藏家们没有一上来就将其新作价格提升到面具系列的价格水平。2010年这些作品中只有一幅曾经达到过有象征性意义的百万美金：《路》。2008年5月28日，这幅沙漠之路的巨大油画(220x400cm)以等值一百万美元的价格在保利拍卖行成交。这件博物馆作品是曾梵志从未拍卖过的名作之一。最近在上海外滩美术馆(RAM)举办的该系列作的展览对这种新艺

artist's most sought-after works – rocketed in price the previous year, crossing the 7-figure US dollar threshold in Hong Kong. Since then, Zeng's top Hong Kong prices have been repeated in both London and New York. Nevertheless, although demand for his works was clearly international, its base was still firmly rooted in China, which accounted for one third of his million-plus results.

Predictably, this star of Contemporary Chinese art did not escape the meltdown of Contemporary art prices in 2008. Christie's had hoped to repeat its success with *Mask series 1996.No.6* when it presented *From the Masses, to the Masses*, a 1993 work that was announced in the catalogue as a historic piece that anticipated the famous *Mask series*. Unfortunately, that night no-one was willing to spend several million dollars on a work by this Contemporary art star (the work's pre-sale estimate was in fact never publicised).

Today prints from the *Mask series* sell at auctions throu-

ghout the world and drawings by the artist can be acquired in Shanghai, Hong Kong, Seoul, London and Paris for less than \$10,000.

Since 2004, Zeng has radically changed his style. The environment has become a new source of inspiration and his landscapes (like his portraits) are now composed with scratch-like brush strokes. But collectors have not raised the prices of these later works to the same levels as those fetched by his *Mask series*. Only one of these paintings had crossed the symbolic \$1m threshold before 2010: *Road*, an immense oil on canvas of a deserted road (220 x 400cm) fetched the equivalent of \$1m on 28 May 2008 at Poly International. This museum-quality piece is one of the largest works by Zeng Fanzhi ever auctioned. However, a recent exhibition of works from this series at the Rockbund Art Museum (RAM) in Shanghai has given substantial market impetus to Zeng's new artistic orientation. Moreover, the recent resale of *Sky series*,

术态度给与了鼓励。此外，2005年的作《天空系列》最近的转手证明了曾梵志新系列作品的价格在一路上攀升：事实上，2006年11月，《天空系列》在北京华辰拍得等值23万美元，一年以后，在中国嘉德以60.4万美元成交，并且最后在罗芙奥拍得107万美元。它的标价在四年内增长了84.7万美元！

a work realised in 2005, proves that prices of his new series are growing: in November 2006, *Sky series* fetched the equivalent of \$23,000 (Beijing Huachen), then \$604,000 the next year (China Guardian) and finally \$1.07m on 29 November 2010. Its price increased \$847,000 in four years!

日本

简要地回顾一下历史：在1987年到1990年的上一次投机性泡沫期间，日本人是艺术市场的主要参与者，他们对印象派和现代艺术最伟大的艺术家的作品进行投资。提醒大家，1990年在纽约创下拍卖世界纪录的梵高的《加谢医生》就是被一名日本商人 Ryohei Saito 先生拍下(7500万美元，佳士得拍卖纽约分部)。不久之后，艺术价格暴跌，而日本人曾试图不惜任何价格转售他们的收藏品。艺术市场花了三年半的时间才开始从这次猛烈的危机中复原。

如今，具有世界知名度的日本艺术家使日本声名远播。特别是摄影家，著名的当代摄影家中就有(日本是第一个自1850年开始接纳摄影的亚洲国家)：吉田公子(Kimiko Yoshida)，杉本博司(Hiroshi Sugimoto)，荒木经惟(Nobuyoshi Araki)和Yasumama Morimura。

然而，创作思潮从民俗文化、漫画、波普艺术和视频中汲取养料，这是日本当代艺术最具

思辨性的趋势。其代表艺术家包括森万里子(Mariko Mori)(在东京还有一家以他的名字命名的博物馆)，奈良美智(Yoshitomo Nara)，青岛千穗(Chiho Aoshima)，高野绫(Takano Aya)，但最特别的还是村上隆(Takashi Murakami)。

村上隆

他是继葛饰北斋(Hokusai)和藤田嗣治(Foujita)之后，在西方最富盛名的日本艺术家，常被视为沃荷的精神之子。他想与沃荷比试作品的数量。村上隆于1996年创建Hiropon工厂，之后成为了生产Kaikai Kiki的公司。2001年，HIRONPON工厂雇用了上百名员工生产限量版的唯一作品、衍生产品、动画电影和唱片封套，以满足他的野心。巴黎卡地亚基金会首次展出(2002年)以及与路易维登的合作所积聚的Kaikai Kiki效应引发了真正的购买狂潮。2003年，拍卖场内的交易数量增加了650%，从而推动它的营业额上涨了258%。2003年是其事业的里程碑，因为它标志

JAPAN

A brief reminder of the background: the Japanese were the main actors of the art market in the previous speculative bubble between 1987 and 1990, investing in the major signatures of Impressionist and Modern art. Remember that the world record bid on 15 May 1990 for Vincent Van Gogh's *Portrait of Docteur Gachet* was delivered by a Japanese businessman Ryohei Saito (\$75m, Christie's New York). Not long after that, art prices began to contract and the Japanese tried to sell their collections at any price. It took the market three and a half years to start recovering from the 1990 meltdown.

Today a number of Contemporary Japanese artists enjoy international fame and recognition. Many of Japan's photographers count among the world's most sought-after Contemporary artists (Japan was the first Asian country to have adopted photographic technology as of the 1850s) including Kimiko Yoshida, Hiroshi Sugimoto, No-

buyoshi Araki and Yasumama Morimura.

However, the most speculative segment of the Contemporary Japanese art market is the creative wave that merged with popular culture, with manga, with Pop art and with video. This wave is dominated by artists like Mariko Mori (a Tokyo museum has even been named after him), Yoshitomo Nara, Chiho Aoshima, Takano Aya but, above all, Takashi Murakami.

Takashi Murakami

The best-known Japanese artist in the West since Hokusai and Foujita is often perceived as the spiritual son of Andy Warhol (whose artistic productivity he has said he wants to equal in volume). Takashi Murakami launched the Hiropon factory in 1996, which subsequently became the production company Kaikai Kiki Co. In 2001, the firm had a hundred or so employees working on unique works, limited editions, acces-

sories, cartoon films and CD covers, allowing Murakami to satisfy his production ambitions. The Kaikai Kiki effect, together with his private view at the Fondation Cartier in Paris (2002) and his collaboration with Louis Vuitton, led to an impressive wave of sales. In 2003, the number of his auction transactions rose 650%, inflating his annual total auction revenue by 258%. Indeed, 2003 was a turning point in Murakami's career as it was the year he started his successful collaboration with Louis Vuitton. Both parties have benefited from this joint venture: the French luxury label Louis Vuitton launched a new campaign to boost sales in its leading market, Japan, while Murakami's work became sustainably fashionable, appearing in the streets of numerous cities around the world. After the splendour and glam of the fashion podiums, the artist contributed to the pomp and prestige of Versailles with a major retrospective this year in the town's historic Château.

The rise of the artist's price

着与路易维登之间硕果累累的合作开始。双方都从中受益匪浅：法国奢侈品品牌由此推出了吸引人的产品，重振他们的第1大市场：日本，而村上隆的审美观最终成为流行趋势，蔓延到大都市的大街小巷。继在时尚T台上快速发展后，2010年，艺术家在历史名胜庄严的凡尔赛宫内举办了艺术回顾展。

艺术家的价格行情随着他知名度的提高而不断水涨船高，显示出他与众不同的成功。爆炸性的需求使他在拍卖会上的销售总额从2002年的一百万美元上升至2008年的3000万美元以上！

2008年叹为观止的营业额要归功于2.54米高的雕塑《我孤寂的牛仔男孩》，共有四个雕像，表现了漫画版色鬼以胜利的姿态射精的形象。该作品成为历史性的话题，并于五月在纽约创造了1350万美元的成交纪录，而估价则仅为300到400万美元。

2009年，继高端当代艺术市场萎缩后，日本的成绩岌岌可危。2009年没有一件拍品的成交价超过百万元以上，而上一一年则有五件。自2010年伦敦秋

拍开始，竞争力开始恢复，佳士得拍卖10月14日推出的Kaikai Kiki (5/5) 雕塑以预期价格成交。作品以估价范围三倍价格成交，即高出170万英镑，合约270万美元，这也给年末的拍卖会带来了好兆头，价格超过百万元的拍品重受万众瞩目（在11月8日菲力普赛加洛先生为菲力普斯拍卖行策划的拍卖会上，Miss ko²的起拍价格为600万美元）。

有足够预算获得一幅油画或一件重要雕塑作品的艺术家的粉丝们可以购买大量发行的小雕塑和石版画来自我安慰。它们的价格从几十美元到几百美元不等。市场上也有大量丝网印刷品，并占到了艺术家委托世界拍卖行出售的作品的63%。

index mirrored that of his blossoming public notoriety, reflecting an exceptionally successful career. Indeed, demand for Murakami's work sent his annual auction revenue from less than \$1m in 2002 to more than \$30m in 2008!

Murakami's spectacular 2008 auction total was achieved largely thanks to *My Lonesome Cowboy*, a 2.54 metre high sculpture of a Manga-like satyr triumphantly ejaculating. The piece made headline news in May of that year when it fetched an auction record of \$13.5m in New York vs. an estimated pre-sale range of \$3m to \$4m.

In 2009, following the contraction of the top end of the Contemporary art market, Murakami's auction results shrank considerably. There were no 7-figure results in 2009 compared with five the previous year. However, acquisitive competition returned to his market at the 2010 autumn sales in London with all eyes focused on his *Kaikai Kiki (5/5)* sculpture presented on 14 October at Christie's. The

piece fetched three times its estimated pre-sale range at £1.7m (\$2.7m). The recent November sales of Murakami's work therefore began with a stronger baseline, and the bidding went quickly into 7-figures (notably, *Miss ko²* fetched \$6m at the Phillips de Pury & Co's New York sale organised by Philippe Ségalot on 8 November).

Of course, Murakami fans who cannot afford his paintings or large sculptures can always treat themselves to a little of the Murakami magic by investing in his small figures and lithographs that are produced in very large editions and range in price from ten to several hundred dollars. In addition, his screen prints have flooded the market and today represent 63% of his works sold at auction.

印度

90年代中期，印度强劲的经济增长催生了新一代艺术事业的赞助者，他们准备好随时投资同胞创作的艺术品。香港和迪拜、伦敦和纽约、新德里和巴黎都在讨论印度的艺术新星在。

在专业销售的助力之下，

印度当代艺术获得了惊人的发展：2008年1月，当代艺术市场价格指数在10年中上涨了830%！印度当代艺术在全球艺术市场信息网2007年3月编制的最具上升势头的潮流排行榜中排名第四，仅次于英国的波普艺术。国际需求如此迫切，所以2007年创设了印度现代和当代艺术品拍卖专场（2007年3月22日苏富比拍卖举办的纽约专场；2007年12月

INDIA

In the mid-1990s, India's strong economic growth produced a new generation of patrons and sponsors with an appetite for investment in Indian art. Today works by the new stars of Indian art change hands in auction houses around the globe – Hong Kong, Dubai, London, New York, Paris – and of course in New Delhi. Driven by the proliferation of specialised “Indian art” sales, Contemporary Indian art posted a spectacular price progression: over the ten years to January 2008, our price index for this category showed growth of 830%! According to Artprice's ranking of the most dynamic art movements drawn up in March 2007, Contemporary Indian art was in fourth place, just behind English Pop art. Indeed, international demand for Indian art became so intense that certain auction houses began organising Modern & Contemporary Indian art sales in 2007 (Sotheby's New York, 22 March 2007, Artcurial Paris,

3 December 2007). Today the market is gathering pace in London, New York, Hong Kong and also in Paris where a major prestigious exhibition, «Paris Delhi Bombay, l'harmonie des contraires», is being prepared for May 2011 at the Centre Pompidou before moving to New Delhi.

In London, Contemporary Indian art receives a particularly warmly reception (e.g. at Saatchi's and Phillips de Pury & Company's BRIC sale in 2010) and its most prominent figure, Anish Kapoor (born in Bombay in 1954, studied in London), is also the segment's best investment. Turner Prize winner in 1991, Kapoor has since become an internationally recognised artist. In 2010 Kapoor was officially “consecrated” in India with a majestic exhibition jointly organised by the British Council, the Lisson Gallery, the Indian Ministry of Culture and the New Delhi National Gallery of Modern Art (NGMA). Nevertheless, London and New York are where Kapoor's works generate his highest results (in

3日巴黎艾/德拍卖举办的巴黎专场)。它们在伦敦、纽约、香港和巴黎市场引起骚动,并准备于2011年5月在巴黎蓬皮杜中心举行名为《巴黎、德里、孟买,矛盾的和谐》展览,而巡展的下一站为新德里。

印度当代艺术在伦敦特别受到好评(2010年沙奇画廊和菲力普斯拍卖行举行的拍卖会)。印度当代艺术的首席价格安全保障者安妮施卡普尔支撑着这个新兴市场:1954年出生于孟买,创作生涯始于伦敦。1991年荣获泰纳奖后,安妮施卡普尔一跃成为国际知名的艺术家。2010年,英国领事馆、里森画廊、印度文化部和新德里现代艺术国家画廊(NGMA)联合举办了安妮施卡普尔的个人展,这也是他在印度的祝圣仪式。今天,伦敦和纽约在争夺他最美丽的拍品,这些拍品已攀升至百万美元以上,而他在亚洲的市场仅刚刚起步。艺术家运用的各种媒体以及升值幅度是作品出口的真正王牌。实际上,如果说他的最高纪录为172万英镑(2008年7月1日苏富比拍卖售出的一件白石雕塑售价为340

万美元),那么以5000美元以下的价格就可得到图画、石版画,甚至小瓷器(2010年9月14日佳士得拍卖的一件这类作品的起拍价为4320美元)。

比他小十岁的苏博德-古普塔自2005年才开始创出拍卖佳绩。如果说哥哥卡普尔的市场中心徘徊于伦敦和纽约之间,那么我们经常可以在亚洲的拍卖目录上发现古普塔的作品(特别是佳士得拍卖香港分部和印度的Emami Chisel Art)。

苏博德-古普塔

2005年,苏富比拍卖拍卖了一幅苏博德-古普塔年轻时时期名为《渔人》的作品(151x167cm)。作者于27岁时创作的这幅丙烯作品估价在10000美元到15000美元,而落槌价为13000美元。一年以后,继第一件在纽约拍卖的作品后,艺术家以一件其他类型的作品而为大众所知:《饥饿的上帝》,使用不锈钢传统厨房用具设计的鲜红的自负。2006年作品在巴黎展出(《白夜》),被法朗索瓦皮诺先生购得,之后在

7-figures) and by comparison his Asian market is still in its infancy. The different media used by the artist and the breadth of his price range are two factors that contribute to the exportability of his works. In fact, while his personal auction record is £1.72m (\$3.4 m for an alabaster sculpture at Sotheby's on 1 July 2008), his drawings, lithographs or even small pieces in ceramic and glass can be acquired for less than \$5,000 (one such piece fetched \$4,320 at Christie's on 14 Septembre 2010).

Ten years younger, Subodh Gupta has begun his auction career in 2005 only. While the heart of his market oscillates between London and New York, Gupta's work is already more frequently included in Asian sales catalogues than Kapoor (notably at Christie's Hong Kong and Emami Chisel Art in India).

Subodh Gupta

In 2005, Sotheby's sold an early work by Subodh Gupta intitled *Fisherman* (151 x 167 cm). The piece, an acrylic on canvas the artist painted when he was 27, was offered with a pre-sale estimate of \$10,000 - \$15,000 and, in effect, it sold for \$13,000. A year after this first auction appearance in New York the artist acquired public notoriety for a completely different type of work: *Very Hungry God*, a sparkling vanity made from stainless steel cooking utensils. The work was exhibited in Paris in 2006 (*Nuit Blanche*), acquired by François Pinault... and then exposed at the Palais Grassi in Venice. In that same year Gupta's schedule included international exhibition in New York, Paris, Brussels, Istanbul, New Delhi, Beijing, and London amongst places, and his price index shot up. For example, when Sotheby's offered his painting *Before the Plunge* (same size and style as *Fisherman*) on 29 March 2006, also estimated at between \$10,000 and \$15,000,

威尼斯葛拉西宫展出。2006年，艺术家参加了多个国际性展览（纽约、巴黎、布鲁塞尔、伊斯坦布尔、新德里、北京、伦敦，等等）而作品行情暴涨。

证明：2006年3月29日苏富比拍卖举行拍卖时，油画《跳入之前》，一幅与《渔人》一脉相承，并尺寸相同的作品，其估价也在10000美元到15000美元，然而拍卖成交价格飙升至4.25万美元。翌日，佳士得拍卖创造了首件成交价格六位数的拍品：Ok Mili 双层装置，以三倍，然后四倍估价成交，成交价格飙升至12万美元！国际化的需求变得如此猛烈，在2008年著名的秋拍前，没有一件作品流拍。

2008年11月当代艺术的退潮是灾难性的：由于拍卖价格过高，古普塔超过百万美元的作品流拍。诚然，《Cheap Rice》（一辆人力车上堆放大量铜罐）在11月12日以70万美元售出，然而佳士得拍卖想拍出的价格要高很多（估价在90万到120万美元）。必须等到2010年夏季才能观察到拍卖复苏的初步征兆：庄严的Chimta 以高于估价两倍的价格成交，成

成交价44万英镑（大约64万美元，佳士得拍卖，6月10日）。9月，另一件Ok Mili在苏富比纽约分部拍出了22万美元的高价，比2006年3月30日的拍出价格高出10万美元。因此经济危机对于这位艺术家市场的干扰只是过客，他的油画作品比雕塑作品的行情更好（2008年5月和7月有两件作品拍到百万元以上）。

the bidding stopped at \$42,500. The following day, Christie's posted his first ever 6-figure result: the installation *Ok Mili* tripled then quadrupled its high estimate fetching \$120,000! After that, demand for Gupta's work became intense – and all the more so for being international – and none of his works failed to sell until the famous meltdown in the autumn of 2008.

The Contemporary art sales in November 2008 produced catastrophic results: more than a million dollars worth of Gupta's works were bought in. At the Christie's sale (12 November 2008) his *Cheap Rice*, a pile of copper pots on a trolley, did manage to sell for \$700,000 despite a pre-sale estimate of \$900,000 - \$1.2m. There was no sign of recovery in demand for Gupta's work until the summer of 2010 when his majestic *Chimta* doubled its pre-sale estimate with a winning bid of £440,000 (approx. \$640,000) at Christie's on 10 June. In September of this year another version of *Ok Mili* fetched \$220,000 at Sotheby's

New York, \$100,000 more than on 30 March 2006. In short, the crisis appears to have had only a temporary impact on the market for this artist whose canvases fetch higher prices than his sculptures (which scored two 7-figure results in May and July 2008).

印度尼西亚

印度尼西亚当代艺术也在蓬勃发展,推动其向前发展的画家包括阿凡迪、古那弯、尤尼扎、鲁迪·曼度凡尼、翰迪怀儿曼·萨普川和尼欧曼·米斯尼亚迪。一些收藏家的巨大投入稳固地支撑着他们的同胞,维持着印度尼西亚当代艺术市场的稳定。收藏家黄鸿仁毫不犹豫地创建了一家、两家,然后是三家博物馆,来保存和展出壮观的收藏品,而他收藏的全部都是印度尼西亚艺术家的作品。然后,香港的佳士得拍卖和苏富比拍卖将印度尼西亚前卫作品加入了他们的拍品行列,刺激了亚洲收藏者的胃口。十年来,蓬勃发展的印度尼西亚艺术新生代与中国一样令人爱慕。在香港推出的印度尼西亚当代艺术品在新千年之初,为谨慎的投资者提供了经济上更有优势的替代方案,所以价格象中国艺术品那样迅速暴涨。这个新市场的获利刺激了微弱的购买欲望,首先是在亚洲,然后是全世界…此后,印度尼西亚吸引了艺术市场的最大买家(他们坦白的

装束在印度尼西亚并不陌生),比如苏富比拍卖,它于2009年在雅加达设立了办事处。以韩国当代艺术为榜样,印度尼西亚艺术不断走出国门:此外,在印度尼西亚当代艺术品大收藏家林运强策划的平台: The Grass Looks Greener Where You Water It, Art Paris+Guests沙龙在2011年目录中专设了印度尼西亚艺术品的章节。

INDONESIA

Contemporary Indonesian art is also booming, driven forward by artists like Affandi, Hendra Gunawan, Yunizar, Rudi Mantofani, Handiwiman Saputra and I Nyoman Masriadi. In effect, particularly strong support from certain Indonesian collectors has provided a relatively solid base for the market for Indonesian Contemporary art. A collector like Oei Hong Djien has not hesitated to create one

museum, then a second and then a third to conserve and exhibit a monumental collection, exclusively devoted to Indonesian artists. Christie's and Sotheby's of Hong Kong have integrated Indonesian avant-garde creations into their sales, stimulating the appetites of Asian collectors. This strategy was highly successful as the new generation of Indonesian artists was much more affordable in the middle of the decade than Chinese art for example. Indonesian Contem-



for such works, initially in Asia and then on a broad international level... Thereafter, Indonesia attracted the planet's biggest art market players (its Free Port also contributed) like Sotheby's who opened a branch in Jakarta in 2009. Just like Contemporary Korean art, Indonesian art is increasingly finding new ways to break beyond its national boundaries: in 2011, the fair ArtParis+Guests will devote a section to Indonesian art entitled *The Grass Looks Greener Where You Water It*, a platform organised by Deddy Kusuma, a major collector of Contemporary Indonesian art.

I Nyoman Masriadi

porary art presented in Hong Kong offered an economically advantageous alternative to prudent collectors at the beginning of the millennium. Prices rose rapidly, carried by the spectacular inflation in the prices of Chinese art. Very quickly, the lucrative prospects offered by this new market amplified demand

The fierce humour of I Nyoman Masriadi's canvases has the potential to seduce an increasingly international audience. For the time being, the artist's work is being sold through auctions in Hong Kong, Singapore, Taiwan, Seoul and Jakarta, five cities that have fuelled the ultra-rapid increase in his price index. Even

埃·尼欧曼·米斯尼亚迪

尼欧曼·米斯尼亚迪油画的幽默笔触懂得如何征服越来越国际化的大众。目前,艺术家在香港、新加坡、台湾、汉城和雅加达如日中天,四个市场使他的作品行情迅速暴涨。即使没有占领英国市场,艺术家在2008年(创纪录的一年)累计的拍卖销售利润达到了810万美元以上,接近国际市场上行情最高的当代艺术家,比如奈良美智(Yoshitomo Nara),马丁·基彭伯格和安德烈亚斯古尔斯基。自2007年开始,他的市场加速发展,作品拍卖成交价格首次超过10万美元。次年,艺术家在他的油画《对不起英雄,我忘记了》中拿美国喜剧英雄开玩笑:蝙蝠侠和超人处于最不英雄的情况下,他们在如厕时办事!2008年10月7日(香港),最差姿势的超级英雄以苏富比拍卖估价的十倍成交,落槌价等值于51.48万美元。两天后,苏富比拍卖推出《班图尔人(最终回)》,三名带着手套,肌肉肥大的士兵围绕一名矮子裁判在打架。长度超过4米的作品令人感到震惊,同样令人震惊

的还有它的价格:650万港币,不含费用,即到手价83.655万美元。2009年,拍卖行曾两次减少拍品并把米斯尼亚迪作品的销售利润下降到四分之一。2010年仍减少了拍卖作品的数量,但是销售利润重新开始大幅上升(一年350万美元)。收藏者恢复了情绪,重新争创纪录,从而使米斯尼亚迪在2010年创造了其三项拍卖纪录中的两项: Sok Ngirit (Pretending to be Prudent) 于10月4日在苏富比拍卖香港分部拍得等值54.1万美元的高价,另一幅作品《我依然幸运》于4月5日在同一拍卖行中拍得53万美元。尽管有大量竞价,但是仍旧比中国当代艺术新星的价格要低100万美元。中国新星之一岳敏君的作品《在湖上》,在《我依然幸运》的拍卖当日,在苏富比拍卖香港分部以161万美元落槌。

without any exposure to US and UK auctions, in 2008 (year of his personal auction record) the artist generated an auction revenue total of more than \$8.1m, equal in stature to the revenue totals of some of the most expensive Contemporary artists on the international market such as Yoshitomo Nara, Martin Kippenberger or Andreas Gursky. His market started accelerating in 2007 with his first 6-figure results. The following year, the artist mocked the American comic heroes in his painting *Sorry Hero, Saya Lupa*. Batman and Superman were portrayed in extremely unheroic postures, conducting their business in public toilets! On 4 October 2008 in Hong Kong, these two undignified super-heroes fetched ten times Sotheby's estimates at the equivalent of \$514,800. Two days later Sotheby's presented *The Man from Bantul (The Final Round)*, with its hypertrophied muscles of three gloved boxers fighting around a tiny umpire. The painting, a triptych measuring more than 4 metres, is im-

pressive... and so is its price: HK\$6.5m (excl. fees), equivalent to \$836,550. In 2009, the auction houses offered just half the number of Masriadi's lots compared with the previous year and this reduced his year-total to a quarter of its 2008 level. In 2010, the number of Masriadi auction lots offered has remained limited, but the revenue total is up (\$3.5m for the year so far). With morale in better shape, collectors are once again fighting over record sums and 2 of Masriadi's 3 best auction results have been generated in 2010: *Sok Ngirit (Pretending to be Prudent)* fetched the equivalent of \$541,000 on 4 October at Sotheby's Hong Kong and *I'm Still Lucky* fetched nearly \$530,000 on 5 April at the same auction house. Although these are big numbers, they are still roughly \$1m beneath the prices commanded by the stars of Contemporary Chinese art. One of the latter, Yue Minjun, saw his painting *On the lake* fetch \$1.61m at the same Sotheby's sale in Hong Kong where *I'm Still Lucky* sold (5 April).

韩国

1988年汉城奥运会和总统选举一致通过标志着韩国发生根本性转变的开端。同时，80年代是韩国当代艺术为世界所认识的开端：比如，韩国画廊首次参加1984年巴黎当代艺术国际展(F. I. A. C.)，1986年韩国艺术家首次参加威尼斯双年展，1995年威尼斯双年展上首次有韩国国家馆，以及1996年邀请韩国参加F. I. A. C.。

两年后，汉城拍卖中心揭幕，成为世界上第十一个当代艺术拍卖行。2008年，尽管发生经济危机，拍卖行在香港设立办事处，以便在国境之外支持韩国艺术家。另一家拍卖行领头羊K Auction于2005年成立，拍品中包括了西方和亚洲当代艺术品。随着新千年的到来，韩国发生了经济奇迹(人均收入从2006年的1.6万美元上升至2010年的2.4万美元)，韩国不仅向世界展示了科技革命，还向世界展现了文化革命，博物馆和研究所的设立就是明证(其中包括2008年开设的白南准博物馆)。

韩国当代艺术不断加大输出力度：佳士得拍卖和苏富比拍卖从2007年开始将韩国当代艺术加入他们的拍卖目录中；2008年在法国巴黎路易威登展示厅举办展览《变形，韩国轨迹》(10月1日到12月31日)，展品包括艺术家徐道获、金范、李炯玖、咸进、Sookyung Yee、吴墉硕、Heryun Kim、全浚皓、郑秀真和Flying City集体的作品。次年，韩国眼、渣打银行和沙奇画廊联合在伦敦举办了《韩国眼：月亮一代》(2009年6月20日至9月13日)，使韩国当代艺术最终进入了全球各大文化都市的视野。2010年又举行了展览《荒诞的现实》，并将于2011年和2012年继续举办。

韩国从此面向世界。但是，相对已经获得一定知名度的中国、日本和印度艺术家而言，西方大众对韩国艺术家仍很陌生。

今天，行情最高的当代艺术家是金東圃、姜亨九和李桓權。金東圃的最高拍卖纪录为576520美元的《Mao vs Monroe》(苏富

SOUTH KOREA

In 1988, the Olympic Games in Seoul and the first election of a President by universal suffrage marked the beginning of a radical transformation of South Korea. At the same time, the 1980s saw the beginnings of international recognition for Korean Contemporary art: a number of Korean galleries participated in the Paris FIAC of 1984... several Korean artists were featured at the Venice biennial in 1986... South Korea had its own national pavilion at the same event in 1995 and South Korea was the guest of honour at the 1996 FIAC.

Two years later, the Seoul Auction Center was inaugurated and it has since become the world's eleventh auction company for Contemporary art sales. In 2008, defying the crisis, the company opened a new branch in Hong Kong allowing it to support Korean artists outside of its national frontiers. Another Korean auction company, K auction, started operations

in 2005 mixing Western with Asian Contemporary art in its sales catalogues. With the turn of the new millennium, the economic miracle continued (per capita income rose from \$16,000 in 2006 to more than \$24,000 in 2010) and South Korea began to shine not just for its technological prowess but also for its cultural revolution with the opening of museums and institutions (including the Nam June Paik museum which opened in 2008).

In recent years, Contemporary Korean art has been promoted abroad with increasing force: Christie's and Sotheby's have been integrating Korean works into their catalogues since 2007. In 2008, the Louis Vuitton centre in Paris held an exhibition entitled *Métamorphoses, Trajectoires coréennes* (1 October - 31 December) with the artists Do Ho Suh, Beom Kim, Hyungkoo Lee, Ham Jin, Sookyung Yee, Yong-seok Oh, Heryun Kim, Jeon Joonho, Suejin Chung and the collective Flying City. The following year, Contemporary Korean art firmly claimed its

status as an unavoidable feature of the planet's major cultural capitals with the highly publicised Korean Eye: Moon Generation exhibition (20 June - 13 September 2009) organised in London by Korean Eye, Standard Chartered and the Saatchi Gallery. The operation was so successful that it was repeated in 2010 with an exhibition entitled Fantastic Ordinary and plans exist for additional events in 2011 and 2012. The country of 'peaceful dawns' is now open to the world. Nevertheless, compared with the public notoriety already gained by certain Chinese, Japanese and Indian artists, Korean artists are still largely unknown to Western audiences.

Today, the most expensive Contemporary Korean artists are Kim Dong-Yoo, Hyung-Koo Kang, Hwan-Kwon Yi. Kim Dong-Yoo's personal auction record is \$576,520 for *Mao vs Monroe* (Sotheby's London); Hyung-Koo Kang scored a best of \$488,680 for his *Vincent Van Gogh in Blue* (Christie's Hong Kong) on 25 November 2007 and Hwan-

比拍卖伦敦分部),而姜亨九的最高纪录是成交价50万美元的《蓝色的文森特梵高》(488 680 美元,2007年11月25日佳士得拍卖香港分部),而李桓樞凭借《Becoming a book》突破11万美元(113802美元,2008年6月27日,上海泓盛拍卖行)。然而这三位领先者都没有达到弘京泽的一幅作品所创下的高价:2007年5月27日,巨大的三部曲《铅笔I》在佳士得拍卖香港分部以70.29万美元成交。

弘京泽

2007年5月27日,《铅笔I》以十倍估价成交而轰动一时。巨幅作品(将近6米宽)展现了大量的具有催眠作用的艺术工具(彩色水笔和铅笔),创造了本场拍卖的第九个纪录,排在中国当代艺术明星岳敏君、张晓刚、曾梵志、刘野和周春芽之后。弘京泽是一位善于运用感觉的艺术家,把戏剧性的强度赋予平庸的物品(比如书本,他偏爱的主题)或者使人头晕的抽象构造。2008年和2009年市场骤然紧缩对他

的一些作品造成了不幸的后果,行情一泻千里,价格跌到将近三分之一。比如《铅笔》(2002年)的彩色焰火在2007年11月25日以等值70730美元售出(佳士得拍卖香港分部),然后在2009年5月25日再次拍卖时,成交价低于2.5万美元(仍旧是佳士得拍卖香港分部)。如果艺术家曾受经济危机的拖累,那么他还显示了惊人的反弹能力,以下两次拍卖可以说明这点:首先是2002年创作的油画作品《图书馆》(73x60cm),在2006年到2010年价值翻了一倍(第一次于2006年11月26日以等值6425美元的价格售出,然后在2010年11月28日以12880美元售出),然后是2001年和2005年间创作的油画《图书馆V》(130x162cm),在2005年到2010年期间行情几乎翻了十倍。第一次以等值16700美元的价格成交,而五年后,以11万美元成交(两次都是在佳士得拍卖香港分部)。

Kwon Yi's *Becoming a book* fetched a personal record of \$113,802 on 27 June 2008 (Shanghai Hosane Auction). However, none of these three leaders has beaten Kyoung Tack Hong's auction record of \$702,900 generated by a huge triptych entitled *Pencil I* at Christie's in Hong Kong on 27 May 2007.

Kyoung Tack Hong

On 27 May 2007, Hong's *Pencil I* caused a sensation when it fetched ten times its pre-sale price range. The monumental work (nearly six metres wide) representing a hypnotic explosion of artists' tools (felt pens and coloured pencils) fetched the ninth best result of the sale behind the stars of the Contemporary Chinese art like Yue Minjun, Zhang Xiaogang, Zeng Fanzhi, Liu Ye and Zhou Chunya. Kyoung Tack Hong is an artist who plays with perception and who attributes dramatic intensity to anodyne objects (books are one of his favourite subjects) or heady abstract constructions. The sharp

总而言之，中国作为艺术市场亚洲区域的引擎，正在不断发展。在2009-2010期间，中国当代艺术销售利润是世界当代艺术收入的25.6%，紧随霸权遥遥欲坠的美国之后。亚洲目前的转变引起了中心偏移，亚洲正在成为全球艺术市场的核心。

contraction of his market in 2008 and 2009 seriously reduced the prices of certain pieces, some of which lost nearly two thirds of their value. For example, his “firework” coloured *Pencil* (2002) sold for the equivalent of \$70,730 on 25 November 2007 (Christie’s Hong Kong) and then reappeared at auction on 25 May 2009 where it fetched less than \$25,000 (again at Christie’s Hong Kong). Although the artist has suffered from the crisis, he has shown a remarkable capacity to bounce back as illustrated by two recent repeat sales: his *Library*, an oil on canvas painted in 2002 (73 x 60 cm) doubled in value between 2006 and 2010 (first sold for \$6,425 on 26 November 2006 then for \$12,880 on 28 November 2010). Then his *Library V*, a larger work created between 2001 and 2005 (130 x 162 cm) which sold for the equivalent of \$16,700 in 2005, fetched \$109,000 five years later (both sales at Christie’s in Hong Kong).

In conclusion, China, the Asian continent’s most powerful art market motor, has not finished its progression. Over the 2009-2010 period, total auction revenue from Contemporary art in China represented 25.6% of global revenue, just behind the share generated in the United States, whose hegemony now appears very fragile.

The mutation of the art market currently underway is leading to a polarity shift in which Asia looks set to emerge as the market’s new centre of gravity.

收藏家洞悉

亚洲，作为现代创造的全新神经中枢，已逐渐变成世界艺术市场上的主角之一。如今重要的艺术收藏家们已经不仅是深谙全球艺术市场，沉醉其中的能人，他们在藏品的选择上通常都具有不凡的洞察力，有时甚至会成为潮流趋势的引领者。

在准备这份报告时，四位收藏家将告诉读者，他们从事艺术收藏的因由以及他们所钟爱的藏品有何特性。

阿努帕姆·波达尔先生 (印度)

我涉足收藏主要受我母亲影响，她收藏了大量印度民间和部落艺术品、纺织品、以及诸多孟加拉学校和孟买进步主义者的艺术品。当我完成学业回到印度，我们开始关注周围新建的农舍。我们热衷于将房间浸淫于艺术，使其充分施展魅力，我希望找到这样的艺术品，能与我们这个时代的主题与语言相映成趣。刚开始，只是找些东西铺满墙壁，可

是对艺术的强烈激情马上变得一发不可收拾。

我购买的第一件艺术品是 Subodh Gupta 的粉色母牛，Rani。它曾是 Peter Nagy 家中大件摆设的一部分，我看到后不禁思考，为何母牛是印度的典型象征。我们沟通了一段时间后，他将纤维玻璃重新粉刷成粉红色。

目前，我们将视角延伸到印度以外，希望从拥有众多充满活力的艺术家的国度，诸如伊朗，网罗艺术珍品，这些地区的艺术收藏正在蓬勃发展。

林运强先生(印度尼西亚)

我的朋友一直问我在过去十年里为什么坚持收藏各种各样的艺术品，又是怎样进行收集的。我的答案一直很简单：这是天性，是本能，最重要的一点，这是我一项“爱好”。然而，在这看似简单的答案背后，漫长曲折的历程构成诸多奇闻异事，各种酸甜苦辣的回忆缠绕其中。大约在

COLLECTORS' INSIGHT

Asia, a new nerve center for contemporary creation, has established itself as one of the leading players on the world podium of art market. Today's important art collectors are not only fascinated human beings and bright people who know about the global art market but the relevance of their choices is often visionary and sometimes turn them into trendsetters.

In preparing this report, four collectors have accepted to tell us what is the genesis of their art collection and what artwork they would love to possess.

Mr Anupam Poddar (India)

My foray into collecting was predicated on my mother's extensive collection of Indian folk and tribal art, textiles and a large body of works by artists from the Bengal School and the Bombay Progressives. When I moved back to India after com-

pleting my education, we shifted into our newly constructed farmhouse. While we were interested in ensuring that art played a significant role in the house, I wanted to find works that echoed the concerns and language of our times. Back then, what started as a need to fill walls, soon became a consuming passion for art.

The first work that I bought was Subodh Gupta's pink cow, *Rani*. I had seen it as a part of a larger installation at Peter Nagy's and thought how the cow was very symbolic of India. We talked about it for a while and he had the fiberglass re-painted to pink.

Currently, we are expanding our horizons beyond India and looking at art from countries like Iran which have many vibrant artists and that is the direction that the collection is growing in.

25年前,我开始“购买”(但还不足以称之为“收藏”)绘画和其它艺术品,例如:雕塑,陶瓷,手工艺品。那时我拥有的第一幅画是出自匿名艺术家的花卉作品,默默无闻,但确是一副让人赏心悦目的作品。

今天,我很骄傲地告知朋友,他们可以放心地称我为“印度尼西亚收藏家”了,自从走上这条路,我低调谦逊,从未梦想,更不用说准备要获得这个赞誉。当我还未意识到的时候,我已经成为一个“艺术的痴迷者”。我的收藏类别很广泛,从表现主义,超现实主义,到现当代艺术。藏品作者大多是来自印度尼西亚的艺术家,其次是中国以及东南亚国家(新加坡,马来西亚,菲律宾,韩国,越南和泰国)。

毫无疑问,作为一个艺术爱好者如果能够拥有出自世界大师,如:伦勃朗,梵高,毕加索,莫奈,赫斯特,沃霍尔等其他著名国际艺术家之手的艺术品,我将感到无比骄傲。

Rudy Tseng先生(台湾)

我30岁时开始收藏艺术品。在那之前,从高中起我就是本地各画廊的常客。由于大学门槛较高,那时我原本要学习商业管理。我的第一份工作是在一家广告公司,然后又进入摄影和发行行业。之后我在迪士尼公司工作了12年。期间我获得创作管理专业硕士学位。在过去的这些年中,我的工作或多或少都与艺术和创作相关,我相信我的生活与艺术密不可分。

我的第一个收藏品是购自二手市场一家业已倒闭的拍卖行,是抽象画家Zhuan Zhe的作品。这件画作我珍藏了20年。总的来说我的收藏品都是当代艺术品,但不限于绘画或雕塑。我更喜爱装置艺术。我和我的艺术品们共同生活在我的家中,而且我还经常给他们挪地儿。

我现在的收藏包括有英国当代艺术家,当代华侨艺术家,例如黄永砵、徐冰、谢素梅和吴山专的作品。我也收藏国际闻名的台湾本地艺术家,包括谢德庆、林明弘、李明维和陈界仁的作品。我的收藏品中也不乏日本,

Mr Deddy Kusuma (Indonesia)

My friends have always asked me how and why I have consistently collected wide varieties of artworks for the past ten years. My answer has always been very simple: it is by nature, by instinct and above all, it is because for me this is a ‘hobby’. However, within this seemingly simplistic answer lies many interesting stories from a long and winding experience that left many bitter-

sweet memories along the way. About twenty-five years ago, I started to “buy” (but it wasn’t enough to call it a “collection”) paintings and other items related to art, for example: sculptures, ceramics and handicrafts. At that time, the first painting I had was a flower-scenery by an anonymous artist, but it was such an enjoyable and entertaining artwork.

Today, I am proud to say that my friends can safely designate me as an “Indonesian Collector”, a designation that I humbly have never dreamt of and let alone preplanned when I set out on this journey. Without realizing it, I have become an “art-addict”. My collections widen from expressionist, surrealism, modern and contemporary art. They are mostly from Indonesian artists, then from China, and Southeast Asian countries (Singapore, Malaysia, Philippines, Korea, Vietnam and Thailand).

As an art-lover of course I would be very proud if I could own artworks from the world masters, i.e.: Rembrandt, Van Gogh, Picasso, Monet, Hirst, Warhol, and other famous international artists.

Mr Rudy Tseng (Taiwan)

I started collecting when I was 30. Before that, I was a frequent visitor to local galleries since high school. Since it was difficult to enter university, I was expected to study business administration. My 1st job was in an advertising agency. Then, I worked in the film and distribution industry. Later, I ran the Walt Disney business for 12 years. I have also taught creative management at graduate school level. Through these past years, my job always related somehow to art and creation. I believe my

life is very close to art.

My first collected work was from the secondary market; from a local auction house that no longer operates. The piece was by artist Zhuan Zhe, an abstract painter. I kept the work for 20 years. In general, I collect mainly contemporary art, but not necessarily paintings or sculpture. I am more fascinated by installation art. I live with my artworks in my home and rotate them from time to time.

My current collection includes works by YBA and overseas Chinese contemporary artists, such as Huang Yun-Ping, Xu Bing, Tse Su-Mei and Wu Shan Zhuan. I also have works by local Taiwanese artists who have become international such as Hsieh Tehching, Michael Lin, Mingwei Lee and Chen Chieh-Jen. My collection includes artists from other Asian countries including Japan, Indonesia, Philippine, Hong Kong

印度尼西亚, 菲律宾的, 香港, 新加坡等其它亚洲国家艺术家的作品。

目前, 我正在关注中国新一代的当代艺术家。我会花时间在亚洲各地, 尤其北京和上海拜访他们的工作室和画廊。毕竟有些艺术品需要亲身品鉴才能决定是否值得珍藏。

Kim先生(韩国)

年轻时, 我很喜欢在汉城仁寺洞的街道上漫步, 那里有许多古董艺术品出售。我可以尽情地欣赏我们国家的传统和精美的艺术。

1979年的某天, 我沿着仁寺洞街道漫步, 一幅奇特的绘画映入眼帘。想象一下一棵枝繁叶茂的大榉树在灼热的夏日开枝散叶。树叶看似平淡无奇, 但人们不是聚集在它们的树荫下乘凉么? 这和艺术异曲同工。

我开始收藏绘画作品正是受到天安城里展出那些画的启发。我想要打造一片拥有清凉树荫的绿洲, 来避开灼灼的夏日阳光。我的第一件藏品是Sang Beom

Lee的水墨画。

个性, 原创性和创造力, 这些是成就一位伟大的当代艺术大师所必需具备的品质。达米恩·赫斯特、马克·奎安、翠西·艾敏、西格玛·波尔克、尼奥·罗施以及苏博德·古普塔正是那些万中选一的伟大艺术家代表。除了美洲和欧洲艺术家之外, 我认为亚洲艺术家同样具有强烈的存在感, 吸引着艺术市场的关注。尤其是印度和中国的艺术家, 具有巨大的潜能。

我认为我们需要一个舞台, 来充分展示这些绚丽夺目的亚洲艺术作品, 因为正如我们所知, 从前那些有名的国外画廊都不曾有过亚洲分支。

这就是ARARIO北京在2005年诞生的历程及原因。它的目的在于为当代艺术开放一个对艺术矢志不渝的空间。

and Singapore.

Currently, I focus on the new generation of Chinese contemporary artists. I spend time visiting studios, gallery hopping throughout Asia, particularly Beijing and Shanghai. Some artworks you need to see in person before making a decision.

Mr Kim (Korea)

In my younger years, I enjoyed wandering the streets of Insa-dong in Seoul where many antique art works were for sale. I could appreciate our tradition and exquisite arts.

It might have been around 1979, I was wandering the Insa-dong streets alone when a marvelous painting caught my eyes. Imagine a big zelkova tree with lush leaves in the burning heat of summer. The leaves seem useless but wouldn't people gather in their shade? It is the same with works of art.

I began collecting paintings from that day and exhibited them in the town of Cheonan.

I wanted to create an oasis of cool shade where to keep out of the glaring heat of summer. The very first piece of my collection was Sang Beom Lee's ink-and-wash painting.

Identity, Originality and Creativity – these are the essential qualities that distinguish great contemporary artists, I believe. Damien Hirst, Marc Quinn, Tracey Emin, Sigmar Polke, Neo Rauch and Subodh Gupta are among these rare individuals. Besides American and European artists, I feel that Asian artists have a strong authenticity, appealing to the art market. Indian and Chinese artists have a particularly great potential.

I figured we needed a place to present these splendid Asian art works since renowned foreign galleries did not have Asian branches back then, as we know.

That is how and why ARA-RIO Beijing opened in 2005. Its purpose is to be an open space for contemporary art with unwavering interest.



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