



***China Engineering Adhesive Industry  
Report, 2009-2010***

**Dec. 2010**

## ***This Report***

- ◆ **Gives an overview of Engineering Adhesive Market;**
- ◆ **Analyzes Market Segments, including Polyurethane Adhesive , Silicone Adhesive, and others;**
- ◆ **Elaborates the operation and development prospect of relatively competitive Global and Chinese manufacturers of Adhesives.**

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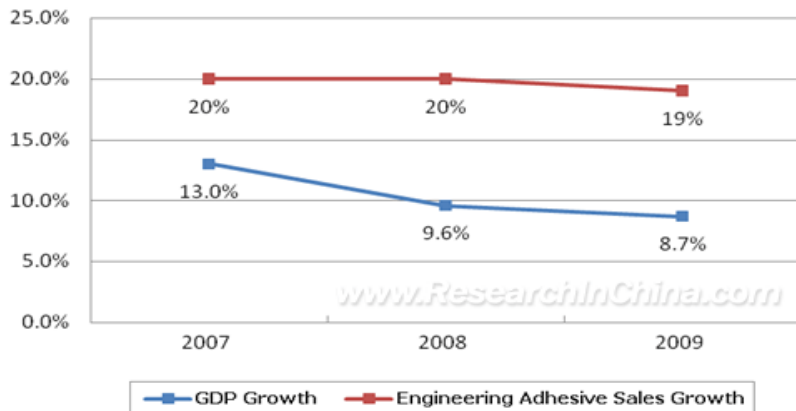
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## Abstract

In 2009, the sales volume and value of engineering adhesives in China totaled 748 kilotons (a 19% share in total sales volume of adhesives) and RMB18.8 billion (accounting for 37% of the total adhesive sale) respectively. Concerning industrial growth, the sales growth rate of engineering adhesives during the recent two years approximated 20%, more than doubling the growth rate of GDP, and the growth momentum of the engineering adhesive industry will continue in the future along with the rapid development of downstream sectors.

### GDP Growth Rate and Engineering Adhesive Sales Growth Rate, 2007-2009



Source: ResearchInChina

As for the market segments of engineering adhesives in 2009, the sales volume of polyurethane adhesives (including part of the solvent adhesives) reached 394 kilotons with the proportion of 52.7%, that of high-performance silicone adhesives arrived at 226 kilotons with the proportion of 30.2%, and that of other adhesives (including epoxy resin adhesives, acrylate adhesives, etc.) amounted to 128 kilotons with the proportion of 17.1%. The future markets of engineering adhesives vary and they are elaborated as follows:

1) Polyurethane Structure Adhesives: the track pavement of high-speed railways will become the most explosive field that demands polyurethane structure adhesives. According to the planning of Ministry of Railways of the People's Republic of China, China will accomplish the high-speed railway track pavement of 13 thousand kilometers in 2012, and up to the end of 2009, China had newly built high-speed railway mileage of 3,459 kilometers, i.e. 9,541 kilometers of high-speed railways will be paved during 2010-2012. Supposing that the track pavement of per-kilometer high-speed railway needs seven tons of polyurethane adhesives, the demand for polyurethane adhesives of Chinese high-speed railway construction can be up to 66.8 kilotons across 2010-2012.

2) High-Performance Silicone Adhesives: over a half of the high-performance silicone adhesives get used in the construction sector which might see the oversupply in the future due to the comparatively mature technology, pure competition, and fast rising capacity. The application of silicone adhesives in such industrial fields as automobile, and electronics & electrical appliances will maintain a growth rate of more than 20% in the following five years; nevertheless, great disparities exist in the requirements on product performance and index from downstream clients, which asks for powerful R&D strength of enterprises, so there are few local manufacturers.

The report underlines not only the overall development, downstream demand, and market segments of Chinese engineering adhesive industry, but also the key manufacturers of engineering adhesives at home and abroad.

The major engineering adhesive enterprises in China consist mainly of Hubei Huitian Adhesive Enterprise Co., Ltd., Beijing TONSAN Adhesives Inc., and Shanghai Kangda Chemical Co., Ltd. (Kangda Chemical).

In 2009, Hubei Huitian Adhesive Enterprise Co., Ltd. achieved the operating income of RMB239 million, of which automotive adhesives contributed more than a half; in H1 2010, it made a breakthrough in high-speed railway adhesives with the revenue of RMB8.43 million. Hubei Huitian Adhesive Enterprise Co., Ltd. is the sole company that highlights engineering adhesives among the five assignees of 'the technology of polyurethane adhesives for high-speed railway convex block platform'. Beijing TONSAN, the leading enterprise in PV components adhesive field, and Kangda Chemical, the domestic No.1 private enterprise in the arena of engineering adhesives for wind turbine blade bonding, both obtained the revenue of over RMB200 million in 2009. Companies like Hangzhou Zhijiang Silicone Chemicals Co., Ltd., Guangzhou Baiyun Chemical Industry Co., Ltd., and Guangzhou Xinzhan Sealant Factory (XINZHAN) all take high-performance silicone adhesives for construction field as main business and they are in the dominant position in this field domestically.

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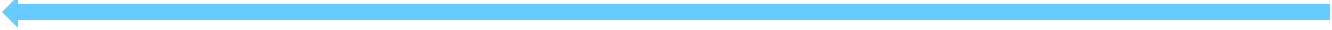
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