China Anti-Corrosion Coating Industry Report, 2010-2011
August 2011
This report

◆ Analyzes development environment of anti-corrosion coating industry in China

◆ Focuses on the market demand for anti-corrosion coating

◆ Highlights the operation of anti-corrosion coating enterprises in China

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Abstract

Recent years have seen fast-growing development in China’s anti-corrosion coating industry, with the producers numbering over 650 and the varieties becoming more and more multi-functional. In 2010, the output of industrial anti-corrosion coating realized 2.18 million tons, up 25.3% year-on-year, making up 22.6% of the total. In particular, the output of heavy anti-corrosion coating increased by 11.2% year-on-year to 1.59 million tons, accounting for 72.9% of the total output of industrial anti-corrosion coating.

By application, the anti-corrosion coating consists of concrete anti-corrosion coating, auto anti-corrosion coating, ship anti-corrosion coating, construction steel structure coating and wind power anti-corrosion coating. Because the concrete anti-corrosion coating market scale is influenced by the investment in railway, road, bridge, port, power plant and chemical industry, the present demand approximates 50,000-100,000 tons per year.
Since 2006, the construction industry of China has embraced a new era for further development. In 2009, China’s output value of construction steel structure coating industry hit RMB3 billion, up 12% year-on-year. In particular, multinational corporations hold the leading position thanks to their powerful brand edge. In 2009, the combined market share of big shots such as Jotun, COSCO Kansai Paint & Chemicals, AkzoNobel, PPG and Hempel realized 24.8%.

In 2009, China’s consumption of wind power coating market reported 26,000 tons. Particularly, Hempel, Jotun, AkzoNobel and PPG are major tower coating providers, with Hempel ranking the first place in terms of market share. In addition, Mankiewicz, PPG and BASF are leading manufacturers in blade coating market. Although Chinese equivalents are latecomers gluing the eyes on wind power coating market, many enterprises, such as Northwest Yongxin Chemical Industry, have taken the first step and spread their wings in the industry.

In 2010, China’s output of auto anti-corrosion coating registered 882,000 tons, accounting for 40.5% of the total output of industrial anti-corrosion coating. Moreover, domestic OEM coating and plastic parts coating market is dominated by international brands, with the market share of OEM coating occupying 75%-80%. By contrast, the refinish coating market is occupied by home-grown brands, with the market share approximating 75%.

In 2010, the total demand of shipping industry of China rose by 7.9% year-on-year to 410,000 tons. In particular, the consumption for ship construction reached 220,000 tons, while that for ship repair touched 190,000 tons, approximately. Due to the hysteresis effect of global financial crisis on the shipping industry, the ship anti-corrosion coating market is expected to maintain growth with the development of the shipping industry.

In 2010, China’s output of container coating attained 100,000 tons, making up 4.6% of the total output of industrial anti-corrosion coating in 2010. Industrial heavyweights including COSCO Kansai Paint & Chemicals, Hempel, KCC and Chugoku Marine Paints have long been occupying more than 90% market share of China’s container coating market. However, the figure declined to 77% in 2009 due to the global economic chaos.
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<tr>
<td>Address:</td>
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</tr>
<tr>
<td>Contact Person:</td>
<td>Liao Yan</td>
</tr>
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