China Anti-Corrosion Coating Industry Report, 2010-2011

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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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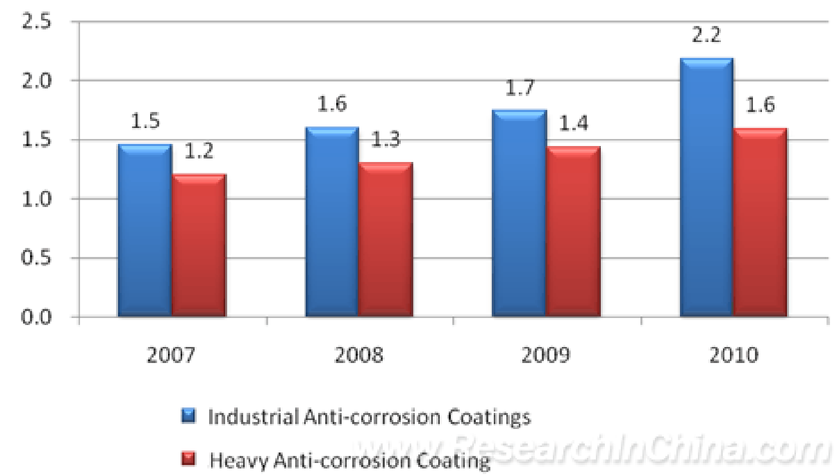
Abstract

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.

Output of Industrial Anti-Corrosion Coating and Heavy Anti-Corrosion Coating in China, 2007-2010 (mln tons)



Source: China National Coatings Industry Association; ResearchInChina

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.

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.

Table of contents

Selected Charts

- Purposes and Specific Applications of Anti-corrosive Coatings
- GDP and YOY of China, 2006-2010
- Competitive Characteristics and Typical Enterprises of China Coating Resin Industry by Region
- Distribution of Coating Resin Market in China (By Region), 2009
- Output of Coating Resins in China, 2004-2009
- Sales Volume of Key Enterprises of Coating Resins, 2009
- Supply and Demand of Titanium Dioxide in China, 2004-2010
- Market Share of Ferric Oxide Industry in China (by Product), 2009
- Major Economic Indicators of Ferric Oxide Industry in China, 2009
- Export of Organic Pigments and Dyes, 2009
- Output of Coating in China, 2001-2010
- Output of Industrial Anti-corrosion Coatings and Heavy Anti-corrosion Coating in China, 2007-2010
- Constitution of Industrial Heavy Anti-corrosion Coating in China (by Raw Material), 2010
- Output of Coating in China (by Region), 2009
- Applications and Coating Supply System of Anti-corrosion Coating of Concrete Structures in China
- Constitution of Automotive Anti-corrosion Coating in China (by Application), 2009
- Capacity of Automotive Coating in China (by Region), 2009
- Major Suppliers of Automotive Coating in China
- Demand for Marine Coating in China, 2001-2010
- Output of Container Coating in China, 2005-2010
- Market Share of Container Coating in China, 2009
- Market Competition of Container Coating in China
- Steel Consumption of Architectural Steel Structure in China, 2008-2009
- Consumption of Architectural Steel Structure Coating in China, 2008-2009
- Structure of Architectural Steel Structure Coating in China (by Raw Material), 2009

Selected Charts

- Structure of Architectural Steel Structure Coating in China (by Solvent), 2009
- Market Shares of Foreign-invested Companies or Joint Ventures in Architectural Steel Structure Market of China, 2008-2009
- Demand for Wind Power Coating in China, 2011-2020E
- Financial Situation of AkzoNobel, 2009-2010
- Revenue of AkzoNobel (by Product), 2008-2010
- Revenue of AkzoNobel (by Region), 2008-2010
- Operation of Some Enterprises of AkzoNobel in China, 2009
- Financial Situation of PPG, 2009-2010
- Revenue of PPG (by Region), 2008-2010
- Revenue of PPG (by Product), 2010
- Operation of Some Enterprises of PPG in China, 2009
- Paint Production Base of COSCO Kansai Paint & Chemicals
- Sales Volume of Jotun COSCO Marine Coatings (by Product), 2009-2010
- Operation of Some Enterprises of Nippon in China, 2009
- Relationship Between Northwest Yongxin Chemical and Actual Controllers
- Operating Revenue of Northwest Yongxin Chemical, 2006-2010
- Operating Income and Net Income of Northwest Yongxin Chemical, 2006-2010
- Operating Revenue of Northwest Yongxin Chemical by Product, 2010
- Operating Revenue of Northwest Yongxin Chemical by Region, 2010
- Operating Revenue and Profit of Paint Products of Northwest Yongxin Chemical by Raw Material, 2010
- Relationship Between Chongqing Sanxia Paints and Actual Controllers
- Operating Revenue of Chongqing Sanxia Paints, 2006-2010
- Operating Income and Net Income of Chongqing Sanxia Paints, 2006-2010
- Operating Revenue of Chongqing Sanxia Paints by Product, 2010
- Operating Margin of Chongqing Sanxia Paints by Product, 2010

Selected Charts

- Operating Income Structure of Chongqing Sanxia Paints by Region, 2010
- Major Aerosol Products of Rainbow Fine Chemical by Sector, 2010
- Operating Revenue Structure of Rainbow Fine Chemical by Product, 2010
- Operating Revenue and Total Profit of Rainbow Fine Chemical, 2008-2010
- Gross Margin of Rainbow Fine Chemical by Product, 2005-2010
- Operating Revenue Structure of Rainbow Fine Chemical by Region, 2010
- Top 5 Suppliers and Clients of Rainbow Fine Chemical, 2008-2010
- R & D Expense and Its Proportion in Total Revenue of Rainbow Fine Chemical, 2008-2010
- Three Industrial Zones of Shijiazhuang Paint Factory
- Operating Revenue and Profit of Shijiazhuang Paint Factory, 2007-2009
- Gross Margin of Shijiazhuang Paint Factory, 2007-2009

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