Global and China Marine Coating Industry Report, 2010-2011

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This report

- **Analyzes development environment of global coating industry and market**
- **Focuses on Protective & Marine Coatings (PMC) Market and Industry**
- **Highlights the operation of major PMC manufacturers and Shipbuilding & Offshore Engineering Companies**

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Abstract

Originated in Europe, the marine coating industry primarily serves the shipbuilding industry, ocean shipping industry and offshore engineering. Northern and Western European countries have accumulated rich experience in marine coating production, and the marine coatings they produced have excellent performance and enable construction at extremely low temperatures, as a result, even the aircraft carriers of the former Soviet Union had to use the coatings of Norwegian Jotun.

The global marine coating industry is highly concentrated, with only six major manufacturers, namely, AkzoNobel's International Paints, PPG, Hempel, Jotun, Kansai, and Chugoku. The latter two are Japanese enterprises and the rest are mostly European ones. PPG is an enterprise of the United States, but its marine coating business is originated from Sigma Kalon acquired in January 2008. Sigma is a Dutch company which has provided the Dutch Navy with protective coatings since 1722.

International Paints is a British company founded in 1881 and merged by AkzoNobel in 1998. Jotun is a Norwegian company, and is also the world's largest producer of marine coatings. Hempel is a Danish company. Kansai is mainly engaged in automotive coating business, but after establishing joint venture with COSCO, the world's largest container owner, it successfully became one of the largest container coating manufacturers In China.

With the largest output of shipbuilding, container and port equipment as well as the most cross-sea bridges in the world, China is the largest marine coating market. However, the Chinese marine coating market is almost monopolized by foreign enterprises and joint ventures, domestic enterprises can only be engaged in the business of coatings for small military ships and hold a market share of less than 5%. All the top six marine coating manufacturers have joint ventures in China, with Chinese enterprises offering cheap labor and foreign enterprises providing advanced technologies.

In 2010, the Chinese shipbuilding industry took the lead in the world with new orders of USD36.3 billion, accounting for 38% of the global market, followed by South Korea with 37%. However, the shipbuilding market has seen a reversal recently. As of the end of September 2011, South Korean shipbuilding industry increased its new orders to USD 4.36 billion, while Chinese shipbuilding industry saw its new orders plummet to USD 1.35 billion, less than 40% of the new orders in the same period of 2010. Six of the top 10 Chinese shipbuilding enterprises received no new orders in Q3 2011, which has adversely affected the Chinese marine coating industry.

The backwardness of Chinese marine coating industry resides in the weakness of basic industries. Epoxy resin (especially high-performance epoxy resin), a raw material of coating, is in short supply in China.

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