China Structural Adhesive Industry Report, 2011-2012

Mar. 2012

ResearchInChina
www.researchinchina.com

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

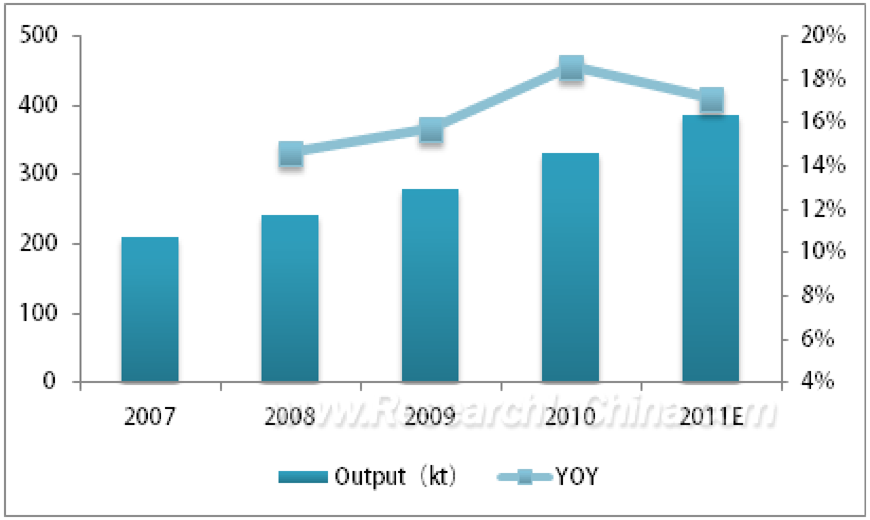
The primary information sources include NBS(National Bureau of Statistics of China), China National Adhesives Industry Association and China Customs etc.

Abstract

As high value-added adhesive products, structural adhesives put forward higher requirements on technical content, manufacturing and use conditions than ordinary adhesives. China's structural adhesive development mainly relied on the introduction of foreign technology at the initial stage; however, in recent years, with the improvement in technology, expansion of downstream application as well as support from national policies, China's structural adhesive industry has stepped into the stage of rapid development.

As of end-2011, there were over 280 professional manufacturers of structural adhesives in China, with output hitting 386 kilotons or so, a YoY increase of 17.1%, accounting for more than 7% of the adhesive output over the same period. Organic silicon structural adhesive is the structural adhesive variety with the largest output in China, which was estimated to be 150 kilotons in 2011, sharing 38.9% of the structural adhesive output over the same period, followed by epoxy structural adhesive and polyurethane structural adhesive with 34% and 18% respectively.

Structural Adhesive Output in China, 2007-2011



Source: CNAIA;
ResearchInChina <China Structural Adhesive Industry Report, 2011-2012>

Construction, automobile, new energy (mainly referring to wind power and photovoltaic industries) and electrical & electronics are still the main application fields for China structural adhesive industry, nevertheless, following the rapid development of wind power, photovoltaic, new energy vehicle and other emerging markets, the future consumption will shift focus to these areas.

China Structural Adhesive Industry Report, 2011-2012 lays stress on the operating environment at home and abroad, overall situation, market supply & demand, market segments, downstream applications and development prospects of China structural adhesive industry, and makes a detailed analysis on its competitive landscape as well as the operation, development advantages and dynamics of 17 structural adhesive enterprises in China.

China structural adhesive industry, unlike the market of ordinary adhesives, has a high concentration ratio. Foreign-funded enterprises or joint ventures, represented by Fuller, Henkel, Momentive, 3M and Sika, occupy most of the mid to high-end market by virtue of their complete product structure and leading technology. Domestic enterprises like Hubei Huitian Adhesive Enterprise, Shanghai KangDa New Materials, Chengdu Guibao and Beijing Tonsan also hold significant share in some market segments for their earlier entrance, strong technology R&D and independent innovation capabilities. For example, in the market of epoxy resin structural adhesive for wind power, Shanghai KangDa New Material obtained market share of 27.4% and 38.5% respectively in 2010 and H1 2011.

Table of contents

Selected Charts

- Definition & Classification of Adhesive
- Industrial Chain of Structural Adhesive
- Main Policies of Structural Adhesive in China
- Adhesive Output & Growth Rate in China, 2003-2011
- Adhesive Sales & Growth Rate in China, 2003-2011
- Structural Adhesive Output & Growth Rate in China, 2007-2011
- Output Breakdown of Structural Adhesive by Chemical Composition in China, 2010
- Market Demand Breakdown of Structural Adhesive by Application in China, 2010
- New Construction Area in China, 2005-2011
- Output of Automobile in China, 2005-2011
- Installed Capacity of Wind Power in China and Worldwide, 2005-2011
- Cumulative Installed PV Capacity in China, 2006-2011
- Industrial Concentration Ratio of Room Temperature Silicone Adhesive in China, 2009
- Output & Growth Rate of Organic Silicon Structural Adhesive in China, 2008-2011
- Output & Growth Rate of Epoxy Resin Structural Adhesive in China, 2008-2011
- Downstream Application Breakdown of Epoxy Resin Structural Adhesive in China, 2008-2010
- Output & Growth Rate of Polyurethane Structural Adhesive in China, 2008-2011
- Output of Acrylate Structural Adhesive and Other Structural Adhesives in China, 2008-2011
- List of Fuller's Manufacturing Plants as of November 27, 2010
- Revenue & Operating Profit of H.B.Fuller, 208-2011
- Revenue Breakdown of H.B.Fuller by Geographic Regions, 2008-2010
- Operating Profit Breakdown of H.B.Fuller by Geographic Regions, 2008-2010
- Employees of Henkel by Region, 2011
- Sales & EBIT of Henkel by Business, Jan.-Sep., 2011
- Sales & Growth Rate of Henkel' Adhesives Business, 2008-2011

Selected Charts

- Sales of Henkel by Region, 2009-2011
- R&D Expenditures of Henkel by Business Sector, Jan.-Sep., 2011
- Sales of ThreeBond, 1998-2010
- Sales Breakdown of ThreeBond by Product, 2010
- Sales & Operating Income of 3M, 2005-2010
- Sales & Operating Income of 3M by Business, 2010-2011
- Main Products of ITW’s Polymers and Fluids Division, 2010
- Revenue & Operating Income of ITW, 2008-2011
- Revenue of ITW by Segment, 2010-2011
- Sales &Operating Income of Sika, 2008-2011
- Sales Breakdown of Sika by Region, 2011
- Sales Breakdown of Sika by Market, 2011
- Subsidiaries of Sika in China by the end of 2011
- Sales & Operating Income of MSC, 2006-2010
- Sales Breakdown of MSC by Business, 2010
- Sales & Operating Income of MPM, 2008-2010
- Sales Breakdown of MPM by Business, 2010
- Sales & Net Income of Dow Corning, 2008-2011
- Revenue & Operating Income of Huitian Adhesive, 2008-2011
- Operating Revenue Breakdown of Huitian Adhesive by Product, 2010-H1 2011
- Operating Revenue Breakdown of Huitian Adhesive by Industrial Application, 2010-H1 2011
- Operating Revenue Breakdown of Huitian Adhesive by Region, 2011
- Research Projects of Huitian Adhesive by the end of 2010
- Revenue & Operating Income of Kangda Chemical, 2008-2011
- Capacity, Output & Sale Volume of Kangda Chemical by Product, 2008-2011

Selected Charts

- Operating Revenue Breakdown of Kangda Chemical by Product, 2008-2011
- Operating Revenue Breakdown of Kangda Chemical by Region, 2008-2011
- Revenue Breakdown of Kangda Chemical by Sales Pattern, 2008-2011
- R&D Expense and its Proportion to Revenue of Kangda Chemical, 2008-2011
- Planned Projects of Kangda Chemical by the end of 2011
- Operating Revenue & Operating Income of Chengdu Guibao, 2009-2011
- Revenue Breakdown of Guibao TECH by Product, 2010
- Revenue Breakdown of Guibao TECH by Product, H1 2011
- Revenue Breakdown of Guibao TECH by Region, H1 2011
- Operating Revenue & Operating Income of Comens Materials, 2008-2011
- Operating Revenue Breakdown of Comens Materials by Product, 2008-2011
- Operating Revenue of Tonsan Adhesive, 2007-2011
- Intended Fund-raising and Investment Projects of Tonsan Adhesive, 2011
- Operating Revenue & Total Profit of Shandong Norinc, 2008-2009
- Revenue of Guangzhou Baiyun, 2007-2009
- Operating Revenue & Operating Income of Hangzhou Zhijiang, 2008-2009
- Operating Revenue & Operating Income of Guangzhou Xinzhan, 2008-2009

How to Buy

You can place your order in the following alternative ways:

1.Order online at www.researchinchina.com

2.Fax order sheet to us at fax number:+86 10 82601570

3. Email your order to: report@researchinchina.com

4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng,Landianchang,Haidian District,Beijing Bank Account No #: 110060668012015061217 Routing No # : 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

Hard copy ………………….…….1,700 USD

PDF (Single user license) …………..1,600 USD

PDF (Enterprisewide license)…....... 2,500 USD

※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.

ResearchInChina
www.researchinchina.com