China Structural Adhesive Industry Report, 2012-2015

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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

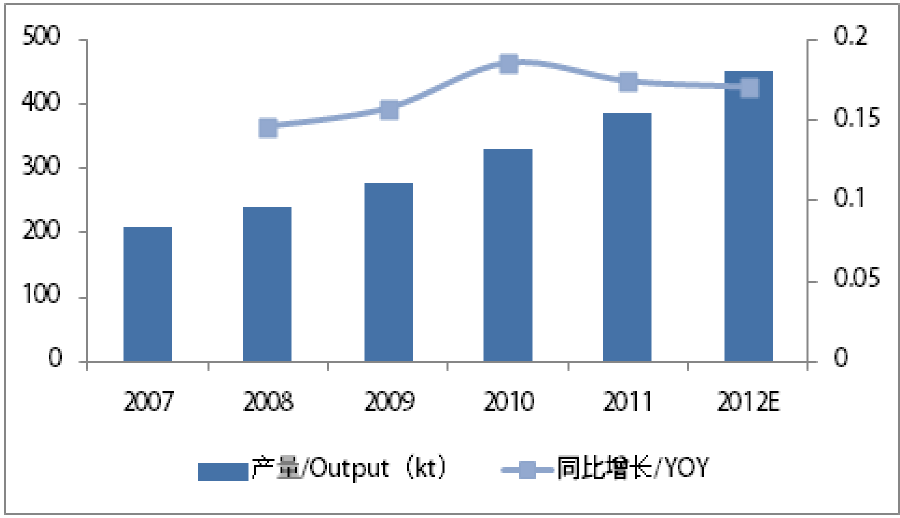
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Structural adhesive is a kind of high value-added adhesive with higher technical content and higher conditions for production and application than average adhesives. In 2007-2011, China's output of structural adhesive presented a CAGR of 16.6%, higher than the growth rate of 13.6% of the adhesive industry in the same period. In 2012, China had a total of nearly 300 professional Structural Adhesive manufacturers with the output rising by 19.6% year-on-year to 453,000 tons. In particular, silicone adhesive, epoxy adhesive and PU adhesive were the three that enjoyed highest output, with the combined proportion as high as 90% or more.

Driven by the robust demand from downstream building, wind power and automotive manufacturing sectors as well as the advances in industrial technology, China-made structural adhesives, especially top-grade special adhesives with silicone adhesive, epoxy adhesive and PU adhesive as base materials, are expected to see an AAGR of 15%-20% when it comes to output.

China's Output of Structural Adhesive and YoY Growth Rate, 2007-2012



Source: CNAIA; ResearchInChina *China Structure Adhesive Industry Report, 2012-2015*

At the early stage, the development of Chinese structural adhesive industry was heavily reliant on the introduction of overseas technologies and was long monopolized by foreign brands such as Fuller, Henkel, Momentive, 3M and Sika. However, after several decades of years of development, domestic players including Huitian Adhesive, Shanghai KangDa New Materials, Chengdu Guibao Science & Technology and TONSAN Adhesive have been provided with competitive technological R&D and independent innovation capabilities, seizing considerable share in some market segments. A case in point is Huitian Adhesive, which is one of major suppliers in automotive adhesive field with the revenue in 2012 hitting RMB226 million. Another case is Shanghai KangDa New Materials, which is leader in wind power epoxy adhesive industry of China with the market share in 2012 high up to 41%.

In addition, given the great confidence in Chinese market and business strategies, international tycoons like Henkel continue their hefty investment in China. In early 2011, Henkel launched the world's largest adhesive plant project-"Long Project" which was conducted in three phases.

Elaborately, the first phase of 270,000 tons/a industrial adhesive and metal surface treatment agent project is estimated to be put into production in mid-2013; the second phase of 140,000 tons/a automotive, general industry and adhesive for civilian use is expected to be finished in 2014H1 after the environmental assessment result was published in Aug.2012.

The report highlights the followings:

Operating environment, status quo, competition pattern, demand & supply, import & export and prospect of China structural adhesive industry;

Status quo, demand & supply and development outlook of China structural adhesive market segments such as silicone, epoxy and PU adhesives.

Operation, adhesive business and prospects of 8 international and 9 Chinese structural adhesive companies.

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