China Engineering 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

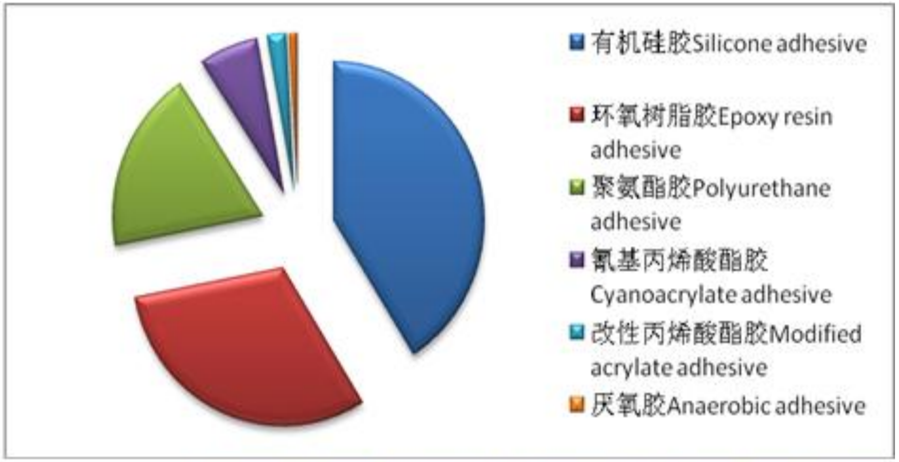
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Engineering adhesive is a sort of product with high intensity and high performance, and it is also called as structural adhesive or half structural adhesive. From 2007 to 2012, China's output of engineering adhesives kept a growth rate of 15.3% and in 2012 it rose to 427,700 tons. At present, engineering adhesive mainly finds application in such areas as construction, wind power generation & photovoltaic, and automobile in China, and the consumption in these three fields accounts for at least 50%.

Engineering adhesives divide into six major categories, i.e., silicone adhesive, epoxy resin adhesive, polyurethane adhesive, cyanoacrylate adhesive, modified acrylic adhesive and anaerobic adhesive; wherein, silicone adhesive is the kind with the largest output, making up around 40% of total output in 2012; followed by epoxy resin adhesive and polyurethane adhesive with their output occupying 30% and 20% or so respectively. In point of development prospects, silicone adhesive and polyurethane adhesive are developing fairly fast and expected to maintain a growth rate between 15%-20% in the upcoming several years, and the proportion of total output of the two will see a rising trend.

Engineering Adhesives Structure (by Chemical Composition) in China, 2012



Source: China National Adhesives Industry Association; ResearchInChina *China Engineering Adhesive Industry Report, 2012-2015*

Chinese engineering adhesive industry mainly depended on introduction of overseas technologies in its initial development stage. For instance, the world's adhesive giants like Fuller, Henkel, Momentive, 3M and Sika all have made investments and established their plants in China, and they hold the majority of engineering adhesive market shares in China by dint of technology superiority and complete product mix. Still, those multnational corporations are expanding their investment in China so as to sweep more market shares. For example, Henkel is constructing a new adhesive factory in Shanghai, China, with the designed capacity of 428,000 tons/a, and the factory will become the largest adhesive manufacturing plant of Henkel in the world once it puts into production.

In the recent years, the engineering adhesive industry of China develops quite rapidly. There were close to 300 manufacturers of engineering adhesive in China in 2012. Some enterprises can compete with the world's renown adhesive companies in some market segments and realize import substitution. For instance, the players like Hubei Huitian Adhesive Enterprise Co., Ltd, Chengdu Guibao Science & Technology Co., Ltd, Beijing Tonsan, and Guangdong Xinzhan have held handsome market shares in the silicone adhesive market, while Shanghai Kangda New Materials Co., Ltd and Beijing Comens New Materials Co., Ltd boasts strong competitiveness respectively in the markets of epoxy adhesive and polyurethane adhesive.

China Engineering Adhesive Industry Report, 2012-2015 by ResearchInChina highlights the followings:

Development status, operating environment, demand and supply analysis, etc of China's adhesive industry;

Supply & deamdn analysis, consumption structure, demand from downstream sectors, competition pattern and development prediction of China's engineering adhesive industry;

Introduction to and output analysis of market segments covering silicone adehsive, epoxy adhesive, polyurethane adhesive and acrylate adhesive;

Operation, engineering adhesive business analysis, prediction and outlook, etc of 17 engineering adhesive manufacturers in China and beyond.

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