



**China Structural Adhesive Industry Report,
2014-2016**

Jun. 2014

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 sort of adhesive with high strength and high performance among adhesives, consisting mainly of silicone structural adhesive, epoxy structural adhesive, polyurethane adhesive, etc.

Along with the development of industries such as real estate, automobile, photovoltaic (PV) and electronics & appliances in China over the recent years, Chinese structural adhesive market size grows rapidly. In 2013, China's output of structural adhesives approximated 589.3kt and achieved the revenue of RMB15.1 billion, among which the output of silicone structural adhesive, being still the largest segmented product category in Chinese structural adhesive adhesive market, accounted for roughly 44.7% in 2013.

The world's renown adhesive producers such as H.B. Fuller, Henkel, 3M, Sika, and Cytec Industries sweep the most shares of Chinese structural adhesive market due to their complete product mix and advanced technologies. Additionally, those multinational corporations still have been aggressively increasing their investments in China, in a bid to hold more market shares. Take Henkel for example, it established the world's largest industrial adhesive plant with production

capacity of 428kt/a (targeted at the demand for adhesives from automotive field and sundry consumer goods in China and other Asia-Pacific regions) in Shanghai in 2013.

Most local Chinese structural adhesive enterprises were established in the period between 1980s and 1990s. Although with a late start, they have been developing rapidly and some of them such as Huitian Adhesive, Shanghai KangDa New Materials Co., Ltd, Chengdu Guibao Science & Technology Co., Ltd., Beijing COMENS New Material Co., Ltd., Hangzhou Zhijiang Silicone Chemicals Co., Ltd, and Guangzhou Xinzhan Silicone Co., Ltd have been the competitors challenging overseas counterparts in some market segments.

Silicone structural adhesive market: as the production capacity of the industrial players like Chengdu Guibao Science & Technology Co., Ltd., Guangzhou Xinzhan Silicone Co., Ltd., and Hangzhou Zhijiang Silicone Chemicals Co., Ltd are expanding aggressively, the competition in Chinese silicone structural adhesive market has become increasingly fierce.

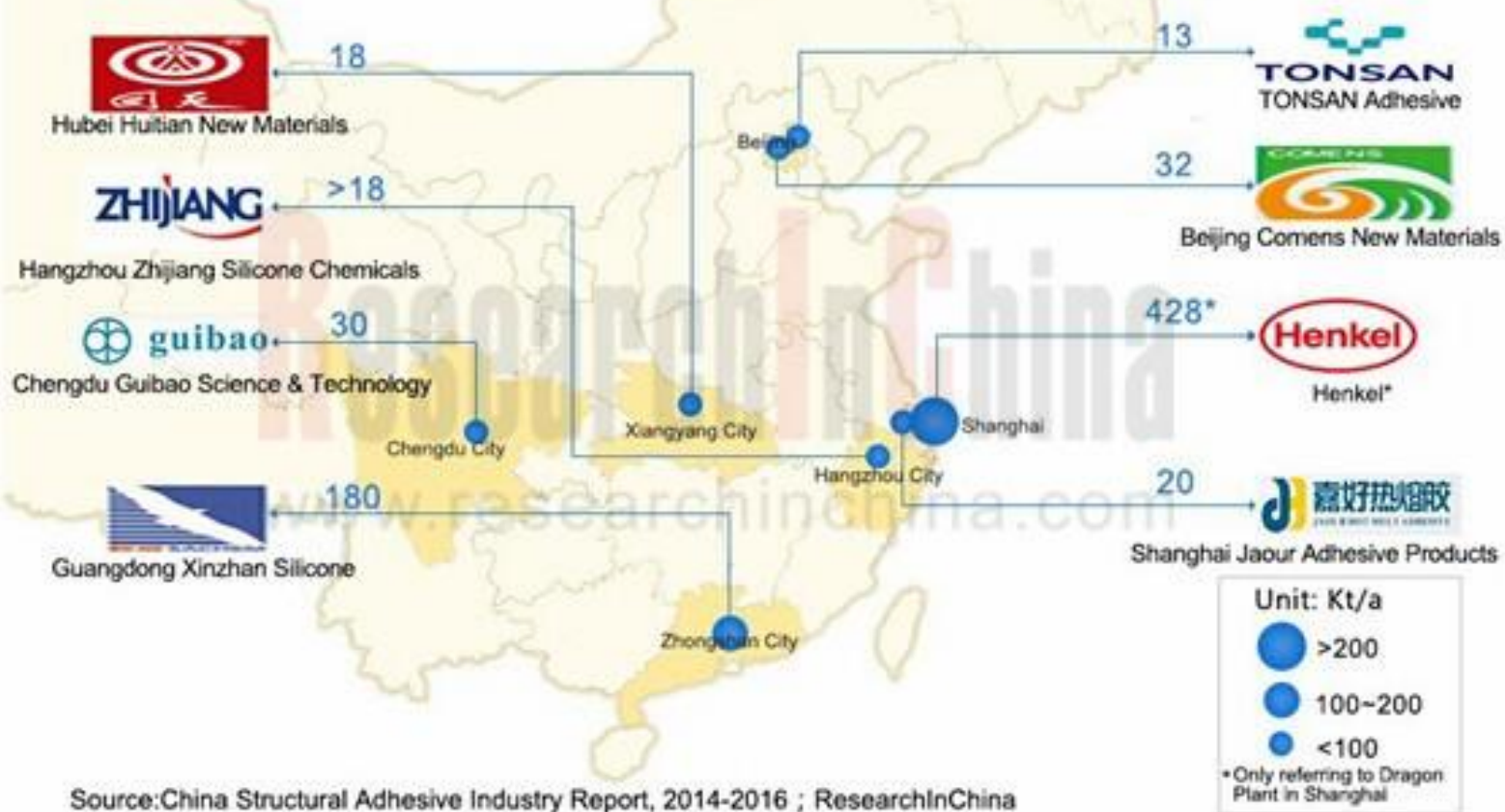
In March, 2013, Guangzhou Xinzhan Silicone Co., Ltd added the silicone sealants capacity of 120kt/a and realized total production capacity of 180kt/a; Hangzhou Zhijiang Silicone Chemicals Co., Ltd is expected to embrace the silicone sealant capacity of 80kt/a to 100kt/a in the second half year of 2014; Chengdu Guibao Science & Technology Co., Ltd is scheduled to raise the silicone room temperature adhesive capacity up to 80kt/a in 2015, an increase of 50kt/a compared with 2013.

Polyurethane structural adhesive market: Beijing COMENS New Material Co., Ltd is the leading player in composite polyurethane adhesive market, and its sales-output ratio has been always above 95% since 2008, the figure even hit 101.1% in 2013. Currently, the company is actively expanding the production capacity of composite polyurethane adhesive, and it is expected that, till the end of 2014 the company's capacity of composite polyurethane adhesive will reach 42kt/a.

China Structural Adhesive Industry Report, 2014-2016 resolves around the followings:

- ✘ Operating environment, status quo, market supply & demand, competition pattern, development forecast, etc of Chinese structural adhesive industry;
- ✘ Analysis on the demand for structural adhesive from downstream markets such as building, automobile, windpower & PV, electronics & appliances, etc. and analysis on market segments such as silicone, epoxy and PU structural adhesives;
- ✘ Operation, adhesive business, development in China, development tendency, etc of 17 global and 16 Chinese Mainland and Taiwanese structural adhesive manufacturers.

Capacity of Major Chinese Structural Adhesive Manufacturers by the end of 2013



Source: China Structural Adhesive Industry Report, 2014-2016 ; ResearchInChina

1 Overview of Structural Adhesive

- 1.1 Definition and Classification of Adhesive
- 1.2 Definition and Classification of Structural Adhesive

2 Overview of China Structural Adhesive Market

- 2.1 Operating Environment
 - 2.1.1 Market Environment
 - 2.1.2 Policy Environment
- 2.2 Status Quo
- 2.3 Supply and Demand
 - 2.3.1 Global
 - 2.3.2 China
 - 2.3.3 Market Demand
- 2.4 Competitive Landscape
- 2.5 Downstream of Structural Adhesive
 - 2.5.1 Construction Field
 - 2.5.2 Automotive Field
 - 2.5.3 Windpower and PV Fields
 - 2.5.4 Electronics and Appliances Field
 - 2.5.5 Other Fields
- 2.6 Development Prospects

3 Structural Adhesive Market Segments in China

- 3.1 Silicone Structural Adhesive
- 3.2 Epoxy Structural Adhesive
- 3.3 Polyurethane Structural Adhesive
- 3.4 Acrylic Ester Structural Adhesive and Others

4 World's Leading Suppliers

- 4.1 H.B. Fuller
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure
 - 4.1.4 Gross Margin
 - 4.1.5 R&D and Investment
 - 4.1.6 Adhesives
 - 4.1.7 Development in China

- 4.1.8 Development Forecast
- 4.2 Henkel
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 R&D and Investment
 - 4.2.6 Adhesive Business
 - 4.2.7 Development in China
 - 4.2.8 Development Forecast
- 4.3 Threebond
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Development in China
- 4.4 3M
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Gross Margin
 - 4.4.5 R&D and Investment
 - 4.4.6 Development in China
 - 4.4.7 Development Forecast
- 4.5 ITW
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Revenue Structure
 - 4.5.4 R&D
 - 4.5.5 Development in China
 - 4.5.6 Development Forecast
- 4.6 SIKA
- 4.7 CYTEC Industries
- 4.8 Momentive
- 4.9 Dow Corning
- 4.10 ASHLAND
- 4.11 AVERY DENNISON

- 4.12 BOSTIK SA
- 4.13 OMNOVA Solutions
 - 4.13.1 Profile
- 4.14 ALTECO CHEMICAL
- 4.15 LORD
- 4.16 Franklin Adhesives & Polymers
- 4.17 JOWAT AG

5 Leading Suppliers in Mainland China

- 5.1 Huitian Adhesive
 - 5.1.9 Development Forecast
- 5.2 Shanghai KangDa New Materials Co., Ltd.
- 5.3 Chengdu Guibao Science & Technology Co., Ltd.
- 5.4 Beijing COMENS New Material Co., Ltd.
- 5.5 Beijing TONSAN Adhesive Co., Ltd.
- 5.6 Shandong North Modern Chemistry Industry Co., Ltd.
- 5.7 Guangzhou Baiyun Chemical Industry Co., Ltd.
- 5.8 Hangzhou Zhijiang Silicone Chemicals Co., Ltd.
- 5.9 Guangzhou Xinzhan Silicone Co., Ltd.
- 5.10 Dongguan Pustar Adhesives & Sealants Co., Ltd.
- 5.11 Shanghai Donghe Adhesive Co., Ltd.
- 5.12 SINWE Electronic Materials
- 5.13 Shanghai Jaour Adhesive Products Co., Ltd.

6 Leading Suppliers in Taiwan

- 6.1 Great Eastern Resins Industrial Co., Ltd (Greco)
- 6.2 Nanpao Resins Chemical Co., Ltd
- 6.3 Texyear

7 Summary and Prediction

- 7.1 Summary
- 7.2 Prediction

- Definition and Classification of Adhesive
- Classification and Application of Structural Adhesive
- Structural Adhesive Industry Chain
- Main Policies about Structural Adhesive in China, 2006-2014
- China's Adhesive Output and YoY Growth, 2003-2013
- China's Adhesive Revenue and YoY Growth, 2003-2013
- Global Adhesives and Sealants Market Capacity, 2013
- Global Adhesive Market Structure by Chemical Composition, 2013
- Global Adhesive Market Structure by Application, 2013
- China's Structural Adhesive Output and YoY Growth, 2009-2016E
- China's Structural Adhesive Output Structure by Chemical Composition, 2013
- China Structural Adhesive Market Structure by Application, 2013
- New Housing Starts, Construction Area and Completed Area in China, 2007-2014
- Automobile Production in China, 2005-2016E
- Newly Installed Wind Power Capacity in China and Beyond, 2007-2013
- Cumulative PV Installed Capacity in China, 2007-2013
- China's Silicone Structural Adhesive Output and YoY Growth, 2008-2016E
- China's Epoxy Structural Adhesive Output and YoY Growth, 2008-2016E
- China's PU Structural Adhesive Output and YoY Growth, 2008-2016E
- China's Other Adhesive Output, 2008-2016E
- Revenue and Net Income of H.B. Fuller, 2008-2014
- Revenue Structure (by Division) of H.B. Fuller, 2013
- Gross Margin of H.B. Fuller, 2008-2014
- R&D Costs and % in Revenue of H.B. Fuller, 2008-2013
- Revenue and Net Income of H.B. Fuller, 2012-2016E

- Revenue and Net Income of Henkel, 2008-2014
- Sales Structure (by Business) of Henkel, 2010-2014
- Sales Structure (by Region) of Henkel, 2010-2014
- Gross Margin of Henkel, 2009-2014
- R&D Costs and % in Revenue of Henkel, 2009-2014
- Adhesive Technology Business Sales and YoY Growth of Henkel, 2009-2014
- Revenue and Net Income of Henkel, 2012-2016E
- Sales of Threebond, 2001-2012
- Sales Structure (by Product) of Threebond, 2012
- Revenue and Net Income of 3M, 2008-2014
- Revenue and Operating Income (by Division) of 3M, 2011-2013
- Revenue and Operating Income (by Region) of 3M, 2011-2013
- Gross Margin of 3M, 2009-2014
- R&D Costs and % in Revenue of 3M, 2008-2013
- Capital Expenditure (by Division) of 3M, 2011-2013
- Revenue and Net Income of 3M, 2012-2016E
- Revenue and Operating Income of ITW, 2008-2014
- Revenue (by Business) of ITW, 2011-2013
- Revenue (by Region) of ITW, 2011-2013
- R&D Costs and % in Revenue of ITW, 2008-2013
- Revenue and Operating Income of ITW, 2012-2016E
- Revenue and Net Income of Sika, 2008-2014
- Revenue Structure (by Application Market) of Sika, 2009-2013
- Revenue (by Region) of Sika, 2013
- R&D Costs and % in Revenue of Sika, 2008-2013

- Acquisitions (Adhesive Sector) by Sika, 2013-H1 2014
- Subsidiaries of Sika in China by the End of 2013
- Revenue and Net Income of Sika, 2012-2016E
- Revenue and Net Income of Cytec Industries, 2008-2014
- Revenue Structure (by Applications) of Cytec Industries, 2011-2014
- Revenue Structure (by Region) of Cytec Industries, 2011-2014
- Gross Margin of Cytec Industries, 2008-2014
- Revenue and Net Income of Cytec Industries, 2012-2016E
- Revenue and Net Income of MSC, 2008-2014
- Revenue (by Product) of MSC, 2013
- Revenue and Net Income of MPM, 2008-2014
- Revenue Structure (by Product) of MPM, 2008-2013
- Revenue and Net Income of Dow Corning, 2008-2014
- Revenue and Net Income of Ashland, 2009-2014
- Revenue and Net Income of Avery Dennison, 2009-2014
- Revenue (by Division) of Avery Dennison, 2013
- Revenue of Bostik, 2009-2013
- Revenue and Net Income of OMNOVA Solutions, 2010-2014
- Revenue and Net Income of Huitian Adhesive, 2008-2014
- Revenue of Huitian Adhesive by Product, 2008-2013
- Revenue of Huitian Adhesive by Application, 2012-2013
- Revenue of Huitian Adhesive by Region, 2008-2013
- Gross Margin of Huitian Adhesive by Product, 2008-2014
- R&D Costs and % in Revenue of Huitian Adhesive, 2008-2013
- Huitian Adhesive's Revenue from Top 5 Customers and % of Total Revenue, 2009-2013

- Huitian Adhesive's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2013
- Major Rivals of Huitian Adhesive
- Revenue and Net Income of Huitian Adhesive, 2012-2016E
- Revenue and Net Income of Shanghai KangDa New Materials, 2008-2014
- Revenue of Shanghai KangDa New Materials by Product, 2008-2013
- Revenue of Shanghai KangDa New Materials by Region, 2008-2013
- Gross Margin of Shanghai KangDa New Materials by Product, 2008-2014
- R&D Costs and % in Revenue of Shanghai KangDa New Materials, 2011-2013
- Project Investment and Progress of Shanghai KangDa New Materials by the End of 2013
- Revenue of Shanghai KangDa New Materials from Top 5 Customers and % of Total Revenue, 2009-2013
- Procurement of Shanghai KangDa New Materials from Top 5 Suppliers and % of Total Revenue, 2009-2013
- Adhesive Output, Sales Volume and Revenue of Shanghai KangDa New Materials, 2011-2013
- Revenue and Net Income of Shanghai KangDa New Materials, 2012-2016E
- Revenue and Net Income of Chengdu Guibao Science & Technology, 2008-2014
- Revenue of Chengdu Guibao Science & Technology by Product, 2008-2013
- Revenue of Chengdu Guibao Science & Technology by Region, 2008-2013
- Gross Margin of Chengdu Guibao Science & Technology by Product, 2008-2013
- R&D Costs and % in Revenue of Chengdu Guibao Science & Technology, 2008-2013
- Revenue of Chengdu Guibao Science & Technology from Top 5 Customers and % of Total Revenue, 2009-2013
- Name List and Revenue Contribution of Top 5 Customers of Chengdu Guibao Science & Technology, 2013
- Procurement of Chengdu Guibao Science & Technology from Top 5 Suppliers and % of Total Procurement, 2009-2013
- Revenue of Chengdu Guibao Science & Technology from Silicone Room-temperature Adhesive by Application, 2011-2013
- Running Trend of Silicone Room-temperature Adhesive Capacity of Chengdu Guibao Science & Technology, 2008-2015
- Revenue and Net Income of Chengdu Guibao Science & Technology, 2012-2016E
- Revenue and Net Income of Beijing COMENS New Material, 2008-2014

- Revenue of Beijing COMENS New Material by Product, 2008-2013
- Gross Margin of Beijing COMENS New Material by Product, 2008-2013
- R&D Costs and % in Revenue of Beijing COMENS New Material, 2008-2013
- Revenue of Beijing COMENS New Material from Top 5 Customers and % of Total Revenue, 2009-2013
- Name List and Revenue Contribution of Beijing COMENS New Material, 2013
- Procurement of Beijing COMENS New Material from Top 5 Suppliers and % of Total Procurement, 2009-2013
- Composite PU Adhesive Capacity, Output & Sales Volume, Capacity Utilization and the Sales-output Ratio of Beijing COMENS New Material, 2008-2013
- Revenue and Net Income of Beijing COMENS New Material, 2012-2016E
- Structural Adhesive Output of Beijing TONSAN Adhesive by Product, 2008-2010
- IPO Projects and Investment Amount of Beijing TONSAN Adhesive, 2011
- Newly Developed Products and Characteristics of Guangzhou Baiyun Chemical Industry, 2013-H1 2014
- Revenue and Net Income of Texyear, 2008-2014
- Revenue of Texyear by Business, 2008-2013
- Gross Margin of Texyear, 2008-2014
- R&D Costs and % in Revenue of Texyear, 2008-2013
- Texyear's revenue from Hot Melt Adhesive and Other Adhesives and % of Total Revenue, 2008-2013
- Capacity, Output, Output Value and Capacity Utilization of Texyear's Hot Melt Adhesive, 2008-2012
- Sales Volume and Sales Value of Texyear's Hot Melt Adhesive, 2008-2012
- Name and Prime Businesses of Texyear's Shareholding Subsidiaries in China and Texyear's Shareholding Ratios of Them as of 2013
- Revenue and Net Income of Texyear, 2012-2016E
- Ranking of World's Major Structural Adhesive Manufacturers by Revenue, 2010-2014
- Ranking of World's Major Structural Adhesive Manufacturers by Net Income, 2010-2014
- Ranking of World's Major Structural Adhesive Manufacturers by Net Profit Margin, 2010-2014
- China's Output of Structural Adhesive (Segmented Products), 2012-2016E

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