



**China Engineering Adhesive Industry
Report, 2015-2018**

Aug. 2015

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

It is over the recent years that China's engineering adhesive market has seen rapid development, with a CAGR of 20.6% during 2009-2014. In 2014, the output of engineering adhesives in China totaled approximately 711,000 tons, up 20.7% from a year ago. Moreover, in automobiles, wind power, high-speed rail, and other high-end fields in which adhesives are used, China-made engineering adhesives have partially substituted for imports.

In China, the demand for silicone adhesive, epoxy resin adhesive, and polyurethane adhesive is the largest, and accounted for 45.1%, 30.3%, and 15.9%, respectively, in 2014. However, other small adhesive varieties including anaerobic adhesive, though occupying a small market share, have high prices and handsome gross margins. In 2014, China's output of anaerobic adhesive totaled only 3,850 tons, but with the average ex-factory price of RMB100,000/ton. Even the products from the manufacturers like Huitian Adhesive and Tonsan Adhesive are priced at more than RMB150,000 /ton.

With a full range of product varieties and advanced technologies, the global well-known adhesive manufacturers such as H.B. FULLER, Henkel, 3M, Sika, and ITW have held the larger portion of the engineering adhesive market in China. What's more, these players are still increasing investments in China to sweep more market shares.

In 2013, Henkel established in Shanghai the world's largest industrial adhesive plant with an annual capacity of 428,000 tons, a plant that is positioned to satisfy the demand for adhesives used in automobiles and consumer goods in Asia. At the end of June 2014, H.B. FULLER announced to acquire a 95% stake in Tonsan Adhesive for RMB1.4 billion (USD230 million) in cash. In early 2015, the acquisition was approved by the Chinese government.

The Chinese engineering adhesive enterprises were mostly founded in the 1980s-1990s. These enterprises, which started very late, develop very fast and can compete with foreign counterparts in some market segments. They consist mainly of Hubei Huitian Adhesive Enterprise, Kangda New Material, Chengdu Guibao Science & Technology, Comens New Materials, Zhijiang Silicone, and Guangzhou Xiinzhan, among others.

As an important supplier of engineering adhesive in China, Hubei Huitian Adhesive Enterprise applies its products in the fields of automobile and renewable energy. In 2014, its output and sales volume of engineering adhesives exceeded 20,000 tons, which generated revenue of RMB634.7 million. Among them, silicone adhesive and polyurethane adhesive accounted for a combined 82.8% share of total revenue. In addition, the company increased the projects of 10kt/a silicone adhesive and 10kt/a polyurethane adhesive in 2015.

Output and Revenue of Engineering Adhesive of Major Companies in China, 2014



Source: China Engineering Adhesive Industry Report, 2015-2018 by ResearchInChina

Kangda New Materials mainly produces epoxy structural adhesive. In 2014, the company produced and sold around 16,000 tons of adhesive and realized revenue of RMB527.2 million, of which epoxy structural adhesive represented 70.0%. On March 20, 2015, the company finished construction of the project with raised funds for epoxy structural adhesive and so forth. The company is now working to apply for trial production, and it is expected to partially yield benefits in 2015.

China Engineering Adhesive Industry Report, 2015-2018 by ResearchInChina highlights the followings:

- ✘ Development status, demand and supply, competitive landscape, and development prediction of China's Engineering Adhesive industry;
- ✘ Current situation, competitive landscape, and development forecast of China's engineering adhesive market segments, including silicone adhesive, polyurethane adhesive, epoxy adhesive, and acrylate adhesive;
- ✘ Operation, adhesive business, and development prospects of 11 overseas and 10 Chinese engineering adhesives enterprises.

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