

China Engineering Adhesive Industry Report, 2012-2015

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Abstracts

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.

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 multinational 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 & demand 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 adhesive, 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.

Contents

1. OVERVIEW OF ENGINEERING ADHESIVE

- 1.1 Profile of Adhesive
- 1.2 Profile of Engineering Adhesive

2. CHINA ENGINEERING ADHESIVE MARKET

- 2.1 Operating Environment
 - 2.1.1 Global Market Environment
 - 2.1.2 China Policy Environment
- 2.2 Overall Status Quo
- 2.3 Demand & Supply
 - 2.3.1 Supply
 - 2.3.2 Demand
- 2.4 Competition Pattern
- 2.5 Downstream Demand for Engineering Adhesives
 - 2.5.1 Construction
 - 2.5.2 Automobile
 - 2.5.3 Wind Power
 - 2.5.4 PV
 - 2.5.5 Electrical & Electronics
 - 2.5.6 Other Fields
- 2.6 Development and Forecast
 - 2.6.1 Development Tendency
 - 2.6.2 Production Forecast

3. CHINESE ENGINEERING ADHESIVE MARKET SEGMENTS

- 3.1 Silicone
 - 3.1.1 Overall Situation
 - 3.1.2 Silicone Engineering Adhesive
 - 3.1.3 Outlook
- 3.2 Epoxy Resin Adhesive
- 3.3 Polyurethane Adhesive
- 3.4 Acrylate Adhesive

4. GLOBAL ENGINEERING ADHESIVE PRODUCERS

4.1 Henkel

4.1.1 Profile

4.1.2 Operation

4.1.3 Revenue Structure

4.1.4 R&D

4.1.5 Business in China

4.2 Threebond

4.2.1 Profile

4.2.2 Operation

4.2.3 Business in China

4.3 ITW

4.3.1 Profile

4.3.2 Operation

4.3.3 Adhesive Business

4.3.4 Business in China

4.4 3M

4.4.1 Profile

4.4.2 Operation

4.4.3 Business in China

4.5 Sika

4.5.1 Profile

4.5.2 Operation

4.5.3 Business in China

4.6 Dow Corning

4.6.1 Profile

4.6.2 Operation

4.6.3 Business in China

4.7 H.B. Fuller

4.7.1 Profile

4.7.2 Operation

4.7.3 Adhesive Business

4.7.3 Business in China

5. ENGINEERING ADHESIVE PRODUCERS IN CHINA

5.1 Hubei Huitian Adhesive Enterprise Co., Ltd

5.1.1 Profile

5.1.2 Operation

- 5.1.3 Revenue Structure
- 5.1.4 Gross Margin
- 5.1.5 R&D
- 5.1.6 Adhesive Business
- 5.1.7 Prediction & Outlook
- 5.2 Shanghai Kangda New Materials Co., Ltd.
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Revenue Structure
 - 5.2.4 Gross Margin
 - 5.2.5 R&D
 - 5.2.6 Adhesive Business
 - 5.2.7 Forecast and Outlook
- 5.3 Chengdu Guibao Science & Technology Co., Ltd.
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Revenue Structure
 - 5.3.4 Gross Margin
 - 5.3.5 R&D
 - 5.3.6 Customers and Suppliers
 - 5.3.7 Adhesive Business
 - 5.3.8 Forecast and Outlook
- 5.4 Beijing Comens New Materials Co., Ltd.
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Revenue Structure
 - 5.4.4 Gross Margin
 - 5.4.5 R&D
 - 5.4.6 Customers and Suppliers
 - 5.4.7 Adhesive Business
 - 5.4.8 Forecast & Outlook
- 5.5 Beijing Tonsan Adhesive
 - 5.5.1 Profile
 - 5.5.2 Adhesive Business
- 5.6 North Modern
 - 5.6.1 Profile
 - 5.6.2 Adhesive Business
- 5.7 Guangzhou Baiyun
 - 5.7.1 Profile

- 5.7.2 Operation
- 5.7.3 Adhesive Business
- 5.8 Hangzhou Zhijiang
 - 5.8.1 Profile
 - 5.8.2 Operation
- 5.9 Guangzhou Xinzhan
 - 5.9.1 Profile
 - 5.9.2 Operation
 - 5.9.3 Adhesive Business
 - 5.9.4 Xinzhan Chemical
- 5.10 Zhejiang Golden Roc
 - 5.10.1 Profile
 - 5.10.2 Operation

Selected Charts

SELECTED CHARTS

Definition and Classification of Adhesives

Classification and Application of Engineering Adhesives

Engineering Adhesive Industry Chain

Major Policies Concerning Engineering Adhesive in China

Adhesive Output and YOY Growth Rate in China, 2003-2012

Adhesive Sales and YoY Growth Rate in China, 2003-2012

Engineering Adhesive Output and YoY Growth Rate in China, 2007-2012

Engineering Adhesive Product Structure in China by Chemical Composition, 2012

Engineering Adhesive Demand Structure in China by Application, 2012

Downstream Demand for Engineering Adhesives

Production Capacity and Revenue of Main Engineering Adhesive Enterprises in China, 2012

China Building New Construction Area and YoY Growth Rate, 2003-2012

China's Automobile Output and YoY Growth Rate, 2003-2012

Types and Functions of Engineering Adhesives for Wind Power Industry

China's Installed Wind Power Capacity, 2003-2012

China's Installed Solar PV Capacity, 2003-2012

China's Engineering Adhesive Output and % of Total Adhesive Output, 2012-2016E

Silicone Product Industry Chain

Classification and Application of Silastic

Application Breakdown of Silicone Room-Temperature Adhesives in China, 2012

Major Silicone Room-Temperature Adhesive Enterprises and Their Capacity in Mainland China, 2012

Consumption and YoY Growth Rate of Silicone Room-Temperature Adhesives in China, 2008-2012

Output and YoY Growth Rate of Silicone Engineering Adhesives in China, 2008-2012

Classification and Application of Epoxy Resin Adhesives

Output and YoY Growth Rate of Epoxy Engineering Adhesives in China, 2008-2012

Classification of Polyurethane Adhesive

Output and YoY Growth Rate of China Polyurethane Engineering Adhesive, 2008-2012

Classification of Acrylate Adhesive

Output of China Acrylate Engineering Adhesive by Product, 2008-2012

Revenue and Net Income of Henkel, 2008-2012

Revenue Breakdown of Henkel by Product, 2010-2012

Revenue Structure of Henkel by Product, 2010-2012

Revenue Breakdown of Henkel by Region, 2010-2012
Revenue Structure of Henkel by Region, 2010-2012
R&D Costs and % of Total Revenue of Henkel, 2010-2012
R&D Costs Proportion of Three Business Departments of Henkel, 2012
Main Products and Capacity of Stage One of Henkel's Shanghai Adhesive Project
Sales Value of Threebond, 2001-2012
Revenue Structure of Threebond by Product, 2012
Product Application Fields and Their Revenue Proportion of Threebond, 2012
ThreeBond Organizations in China
Revenue and Operating Income of ITW, 2010-2012
Revenue Structure of ITW by Business, 2012
Revenue Structure of Polymers & Fluids' Downstream Markets of ITW, 2012
Business of ITW's Polymers & Fluids in China, 2012
Net Sales and Net Income of 3M, 2008-2012
Revenue Structure of 3M by Business, 2012
Development of 3M in China
Net Sales and Net Income of Sika, 2008-2012
Revenue Structure of Sika by Region, 2012
Revenue Structure of Sika by Industry, 2012
Development History of Sika in China
Sales and Net Income of Dow Corning, 2008-2012
Development History of Dow Corning in China
Net Revenue and EBITDA of H.B. Fuller, 2008-2012
Net Revenue Structure of H.B. Fuller by Division, 2010-2012
Operating Income Structure of H.B. Fuller by Division, 2010-2012
Production Equipments of Fuller, 2012
Revenue and Net Income of Hubei Huitian Adhesive Enterprise, 2008-2013
Revenue of Hubei Huitian Adhesive Enterprise by Product, 2010-2012
Revenue Structure of Hubei Huitian Adhesive Enterprise by Product, 2010-2012
Revenue of Hubei Huitian Adhesive Enterprise by Sector, 2010-2012
Revenue Structure of Hubei Huitian Adhesive Enterprise by Sector, 2010-2012
Revenue of Hubei Huitian Adhesive Enterprise by Region, 2010-2012
Revenue Structure of Hubei Huitian Adhesive Enterprise by Region, 2010-2012
Gross Margin of Hit Products of Hubei Huitian Adhesive Enterprise, 2010-2012
Main R&D Projects of Hubei Huitian Adhesive Enterprise, 2012
R&D Costs and % of Total Revenue of Hubei Huitian Adhesive Enterprise, 2010-2012
Output and Sales Volume of Engineering Adhesives & Chemicals of Hubei Huitian Adhesive Enterprise, 2011-2012
Revenue and Net Income of Hubei Huitian Adhesive Enterprise, 2011-2015E

Revenue and Net Income of Kangda New Materials, 2009-2013
Revenue Breakdown of Kangda New Materials by Product, 2010-2012
Revenue Structure of Kangda New Materials by Product, 2010-2012
Revenue Breakdown of Kangda New Materials by Region, 2009-2011
Revenue Structure of Kangda New Materials by Region, 2009-2011
Gross Margin of Main Products of Kangda New Materials, 2010-2012
R&D Costs and % of Total Revenue of Kangda New Materials, 2010-2012
Capacity of Major Adhesives of Kangda New Materials, 2009-2012
Engineering Adhesive Output and Sales Volume of Kangda New Materials, 2011-2012
Output Proportion of Major Adhesives of Kangda New Materials, 2011
Prices of Major Adhesives of Kangda New Materials, 2009-2011
Revenue and Net Income of Kangda New Materials, 2011-2015E
Revenue and Net Income of Guibao Science & Technology, 2008-2013
Revenue Breakdown of Guibao Science & Technology by Product, 2010-2012
Revenue Structure of Guibao Science & Technology by Product, 2010-2012
Revenue Breakdown of Guibao Science & Technology by Region, 2010-2012
Revenue Structure of Guibao Science & Technology by Region, 2010-2012
Gross Margin of Guibao Science & Technology by Product, 2010-2012
R&D Costs and % of Total Revenue of Guibao Science & Technology, 2010-2012
Guibao Science & Technology's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012
Name List and Revenue Contribution of Guibao Science & Technology's Top 5 Clients, 2012
Output and Sales Volume of Guibao Science & Technology's Silicone Adhesive and Coupling Agent, 2011-2012
Applications and Revenue of Guibao Science & Technology's Silicone Adhesives, 2011-2012
Classification and Applications of Guibao Science & Technology's Room Temperature Silicone Adhesives
Revenue and Net Income of Guibao Science & Technology, 2011-2015E
Revenue and Net Income of Beijing Comens New Materials, 2008-2013
Revenue Breakdown of Beijing Comens New Materials by Product, 2010-2012
Revenue Structure of Beijing Comens New Materials by Product, 2010-2012
Revenue Breakdown of Beijing Comens New Materials by Region, 2010-2012
Revenue Structure of Beijing Comens New Materials by Region, 2010-2012
Gross Margin of Major Products of Beijing Comens New Materials, 2010-2012
R&D Costs and % of Total Revenue of Beijing Comens New Materials, 2010-2012
Beijing Comens New Materials' Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Name List and Revenue Contribution of Beijing Comens New Materials' Top 5 Clients, 2012

Polyurethane Adhesive Products and Applications of Beijing Comens New Materials

Polyurethane Adhesive Capacity of Beijing Comens New Materials, 2008-2012

Polyurethane Adhesive Output and Sales Volume of Beijing Comens New Materials, 2011-2012

Revenue and Net Income of Beijing Comens New Materials, 2011-2015E

Subsidiaries and Capacities of Major Products of Beijing Tonsan, 2012

Fundraising Investment Project Overview of Beijing Tonsan, 2013

Revenue and Total Profit of Shandong Norinc, 2008-2009

Operating Revenue and Operating Income of Guangzhou Baiyun, 2008-2009

Classification and Application of Guangzhou Baiyun's Adhesive Products

Operating Revenue and Total Profit of Hangzhou Zhijiang, 2007-2009

Operating Revenue and Operating Profit of Guangzhou Xinzhan, 2008-2009

Operating Revenue and Total Profit of Zhejiang Golden Roc, 2007-2008

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