

China Heat Shrinkable Materials Industry Report, 2010-2011

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Abstracts

Since 1990s, China heat shrinkable materials industry has been in a stage of rapid development. In 2010, there were approximately 180 manufacturers of heat shrinkable materials in China, with the gross industrial output value accomplishing RMB8.15 billion. It is expected that the gross industrial output value will register RMB12.6 billion by 2015.

This report summarizes the development of China heat shrinkable materials industry, analyzes the scale and competition patterns of the industry, and predicts the demand of electronics, electric power, high-speed railway and automobiles for heat shrinkable materials.

The heat shrinkable materials for electronics and electric power are the leading products in China, where there are numerous manufacturers of electronic heat shrinkable materials, but they mainly compete with each other in the low-end market. Fueled by the growth in investments in power grids across China, the demand for electrical heat shrinkable materials shows robust growth. It is expected that, the output of heat shrinkable cable accessories in China will reach 9.75 million sets in 2011; and the market of electrical heat shrinkable materials will value RMB2.03 billion.

Chinese automotive heat shrinkable materials market is occupied by Raychem and Sumitomo Electric, while domestic counterparts only have 20% shares. However, as domestic enterprises gain the certification in the automotive industry and have the price advantage, their market shares are expected to increase further.

In 2010, Raychem, Changyuan Group and Shenzhen Woer took 66% shares in Chinese heat shrinkable materials market together. This report focuses on the operation and development strategies of 25 heat shrinkable materials manufacturers, including

Raychem, Changyuan Group, Shenzhen Woer, China-Kinwa, Phoenix Technology, Shenzhen Hongshang, Wuxi EL PONT and Jiangsu Dasheng.

Raychem is the world's largest manufacturer of heat shrinkable materials, and its main products include heat shrinkable tubing, heat shrinkable cable accessories and communication cables accessories. It monopolizes the international heat shrinkable product market. Particularly in the fields of aerospace and military, Raychem enjoys absolute competitive superiority.

Changyuan Group mainly produces heat shrinkable tubing used in electronics, automobiles and oil & gas pipelines. In the heat shrinkable materials industry, Changyuan Group ranks first in China and second in the world. In 2010, its heat-shrinkable tubing capacity was 1.64 billion meters, and it gained RMB647 million from heat shrinkable materials, of which the sales of the heat shrinkable materials used in high-speed railway was RMB80 million. Changyuan Group is the only one that obtains the high-speed railway heat shrinkable materials certification in China, this field will become a new profit growth point for it.

Shenzhen Woer is a key heat shrinkable materials production base in China. It mainly produces electronic and electrical heat shrinkable products. In 2010, it sold 1.15 billion meters of electronic heat shrinkable tubing. It ranked first in terms of sales volume in China for consecutive three years. In 2011, as its new projects are put into operation, its production scale will be expanded dramatically.

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