

China Structural Adhesive Industry Report, 2014-2016

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Abstracts

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 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.

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