

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.

Contents

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
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Revenue Structure
 - 4.6.5 R&D and Investment
 - 4.6.6 Development in China

- 4.6.7 Development Forecast
- 4.7 CYTEC Industries
 - 4.7.1 Profile
 - 4.7.2 Operation
 - 4.7.3 Revenue Structure
 - 4.7.4 Gross Margin
 - 4.7.5 Investment
 - 4.7.6 Adhesives
 - 4.7.7 Development in China
 - 4.7.8 Development Forecast
- 4.8 Momenitive
 - 4.8.1 Profile
 - 4.8.2 MSC
 - 4.8.3 MPM
 - 4.8.4 Development in China
- 4.9 Dow Corning
 - 4.9.1 Profile
 - 4.9.2 Operation
 - 4.9.3 Development in China
- 4.10 ASHLAND
 - 4.10.1 Profile
 - 4.10.2 Operation
 - 4.10.3 Adhesives
 - 4.10.4 Development in China
- 4.11 AVERY DENNISON
 - 4.11.1 Profile
 - 4.11.2 Operation
 - 4.11.3 Revenue Structure
 - 4.11.4 Divestiture
 - 4.11.5 Development in China
- 4.12 BOSTIK SA
 - 4.12.1 Profile
 - 4.12.2 Operation
- 4.13 OMNOVA Solutions
 - 4.13.1 Profile
 - 4.13.2 Operation
 - 4.13.3 Development in China
- 4.14 ALTECO CHEMICAL
 - 4.14.1 Profile

- 4.14.2 Development in China
- 4.15 LORD
 - 4.15.1 Profile
 - 4.15.2 Development in China
- 4.16 Franklin Adhesives & Polymers
 - 4.16.1 Profile
 - 4.16.2 Development in China
- 4.17 JOWAT AG
 - 4.17.1 Profile
 - 4.17.2 Development in China

5 LEADING SUPPLIERS IN MAINLAND CHINA

- 5.1 Huitian Adhesive
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 R&D and Investment
 - 5.1.6 Customers and Suppliers
 - 5.1.7 Adhesive
 - 5.1.8 Rivals
 - 5.1.9 Development Forecast
- 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 and Investment
 - 5.2.6 Customers and Suppliers
 - 5.2.7 Adhesive
 - 5.2.8 Development Forecast
- 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 and Investment
 - 5.3.6 Customers and Suppliers

- 5.3.7 Adhesive
- 5.3.8 Development Forecast
- 5.4 Beijing COMENS New Material 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 and Investment
 - 5.4.6 Customers and Suppliers
 - 5.4.7 Adhesive
 - 5.4.8 Development Forecast
- 5.5 Beijing TONSAN Adhesive Co., Ltd.
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Development Prospects
- 5.6 Shandong North Modern Chemistry Industry Co., Ltd.
 - 5.6.1 Profile
 - 5.6.2 Adhesive Manufacturer
- 5.7 Guangzhou Baiyun Chemical Industry Co., Ltd.
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 R&D
- 5.8 Hangzhou Zhijiang Silicone Chemicals Co., Ltd
 - 5.8.1 Profile
 - 5.8.2 Operation
- 5.9 Guangzhou Xinzhan Silicone Co., Ltd
- 5.10 Dongguan Pustar Adhesives & Sealants Co., Ltd
 - 5.10.1 Profile
 - 5.10.2 Development
- 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
 - 6.2.1 Profile
 - 6.2.2 Business in China

6.3 Texyear

6.3.1 Profile

6.3.3 Operation

6.3.3 Revenue Structure

6.3.4 Gross Margin

6.3.4 R&D

6.3.5 Adhesives

6.3.6 Business in China

6.3.7 Development Forecast

7 SUMMARY AND PREDICTION

7.1 Summary

7.2 Prediction

Selected Charts

SELECTED CHARTS

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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