

Research Report on Global and China Aerosol Industry, 2013-2017

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Abstracts

Global consumer markets suffered seriously in the financial crisis in 2008. As a result, residents curtailed unnecessary expenses, which made the market demand decline. In return, global aerosol output volume also declined. However, since 2010, global markets have gradually recovered. In the past few years, global aerosol output volume showed a rising trend. It increased from 12 billion cans in 2006 to 14.4 billion cans in 2012, with CAGR of 3.1%.

It is estimated that the global output volume of aerosol products will exceed 16 billion cans by 2017. The CAGR will maintain around 3% during 2011-2016. Proportion of China aerosol output volume in the world will increase from 11.2% in 2012 to 18.8% in 2017. China has become an important aerosol producer, aerosol OEM and aerosol consumer in the world.

In China market, there are more than 1,000 aerosol brands, which mainly concentrated in insecticide, paint and auto-care. In the early stage, most factories were low-end product manufacturers and original equipment manufacturers with lagging production lines and technology. The major product strategies were following strategies. With the rapid development in ASEAN and other BRICS, China's industry advantages in international competition gradually become weak. The performance in domestic market is also inconsistent with the huge Chinese market. In recent years, some leading aerosol enterprises actively engage in developing new aerosol products and bring in foreign advanced production lines. Since the second half of 2010, the demand for auto-care products, personal care products and aluminum aerosol cans home and abroad has been increasing. As a result, the aerosol industry achieved a full recovery. At present, there are various aerosol products in Chinese market, which include insecticide aerosol, paint aerosol, household aerosol, personal-care aerosol, auto-care aerosol,

food aerosol, medical aerosol and industrial aerosol.

Aerosol industry in China develops rapidly in recent years with huge market prospect. Aerosol industry started in the early 1980s in China and the aerosol output volume was only 30 million cans in the mid 1980s. The output volume rocketed to 560 million cans in 2000 and even reached 1.61 billion cans in 2012. China has already been one of the largest aerosol producers in the world. In 2008-2012, although the cardinal number was very large, CAGR still reached 11.3%, which is higher than the GDP growth rate. However, in terms of consumption per capita, the annual consumption per capita of aerosol was 0.79 cans in 2008 and it was 1.19 cans in 2012. It is greatly different from that of the world, which is 2 cans. It is equivalent to less than 1/10 of that in the U.S. (12.3 cans). The data also shows that there is huge potential for aerosol products in Chinese market. It will be a superb opportunity to develop for aerosol manufacturers.

Aerosol product structure is constantly optimizing in China. Presently, insecticide and paint are the Top 2 products by the proportion in China aerosol market. However, personal care products and household goods are the Top 2 products by the proportion in the global aerosol market. The two proportions can separately reach 40% and 30% in mature markets. In recent years, the proportion of insecticide and paint is declining while the proportion of personal products and household products is obviously rising in China aerosol market. It is mainly caused by the rapid development of economy. Household products and auto products have close relationship with livelihood, so the consumption of them increases with the increase of disposable income. Therefore, in terms of product structure, there is huge space in domestic market for aerosol products. Industry concentration is strengthening. Along with the gradually maturing aerosol market in China, the leading enterprises are constantly expanding the production scale and developing high-value products. As a result, their market share will become higher. Although aerosol brands are still rather decentralized, after a new round of self-elimination and shuffle, the concentration of aerosol industry will be improved constantly.

Aerosol is direct-to-consumer products. In recent years, consumer markets develop rapidly, which brings great market demand in aerosol industry. With the continuous development of national economy, people's consumption level improved, life quality and spending habits changed and knowledge on aerosol products deepened. All of these will provoke the consumption and output volume of aerosol and China aerosol industry will enter a rapid development stage. According to China Research and Intelligence, the annual output volume of aerosol will reach 3.15 billion cans by 2017 and the annual per capita consumption will reach the world average.

China Research and Intelligence composed this report by investigating aerosol manufacturers and trade companies and interviewing the industry experts. Through this report, the readers will acquire the following information:

Global and China Aerosol Market Overview

Supply and Demand of Aerosol in China

Development of Aerosol Sub-sectors in China

Market Competition of Aerosol in China

Major Manufacturing Enterprises and Their Operation Status

Forecast on China Aerosol Industry Development

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