

China Adhesives and Tape Industry Association

Adhesive Market of Mainland China

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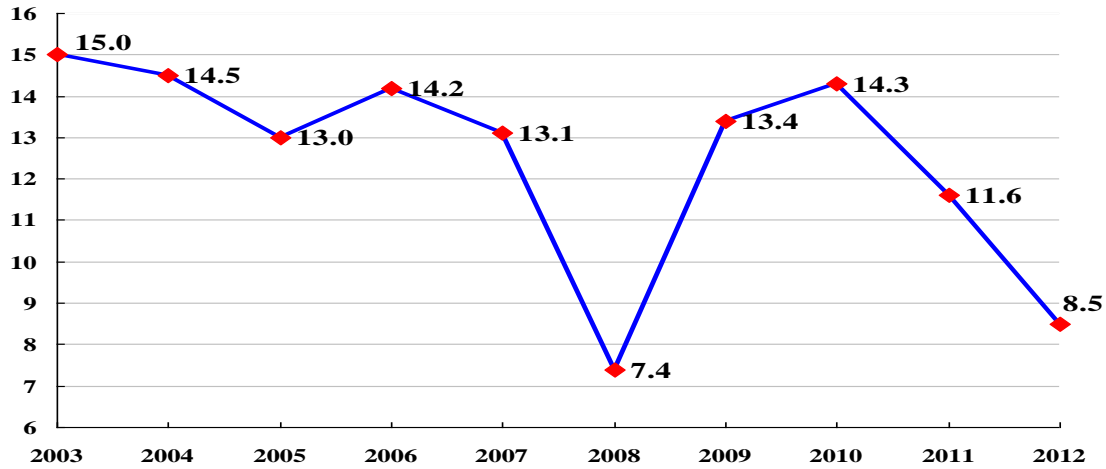
Secretary General of CATIA



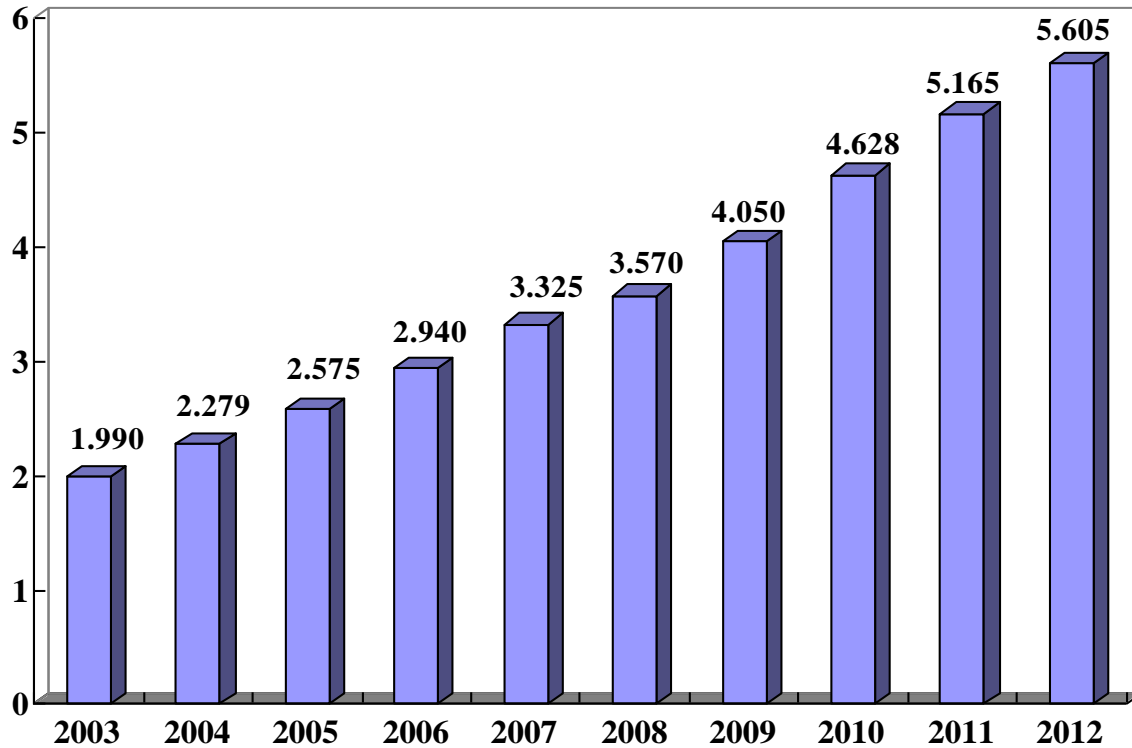
1. Overview of Adhesive Industry in Mainland China

Tab. 1 Adhesive output, sales value and growth rate during 2010-2012

Year \ Type	Output (million tons)	Sales Value (billion RMB)	Growth Rate (%)	
			Output	Sales Value
2010	4.628	58.73	14.3	11.7
2011	5.165	66.93	11.6	14.0
2012	5.605	70.88	8.5	5.9



Growth Rate (%)



Output (million tons)



Tab. 2 Classification of Adhesive in Mainland China in 2012

Type of Adhesive	Name of Adhesive	2012 Year	
		Sales Volume (1,000 tons)	Sales Value (billion RMB)
Water-based Adhesive	PAE Emulsion	2,250	—
	PVAc Emulsion	690	—
	VAE Emulsion	437	—
	PU Dispersion	34	—
	CR Latex	2.6	—
	Total	3,413.6	25.36



Classification of Adhesive in Mainland China in 2012 (Cont'd)

Type of Adhesive	Name of Adhesive	2012 Year	
		Sales Volume (1,000 tons)	Sales Value (billion RMB)
Solvent-based Adhesive	SBS Resin	207	—
	CR	170	—
	PA	178	—
	Total	555	8.46
Hot Melt Adhesive	EVA Resin	222	—
	Synthetic Rubber	164	—
	Others	125	—
	Total	511	10.29



Classification of Adhesive in Mainland China in 2012 (Cont'd)

Type of Adhesive	Name of Adhesive	2012 Year	
		Sales Volume (1,000 tons)	Sales Value (billion RMB)
Reactive Adhesive	PU	580	—
	Epoxy	124	—
	Cyanoacrylate	22.5	—
	Modified Acrylate	10	—
	Anaerobic	3.1	—
	Total	739.6	17.61
Others	Silicone	360	—
	Polysulfide	26	—
	Total	386	9.16



Market Drivers for Fast Growth

Silicone Adhesive

Polyurethane Adhesive

Acrylate Adhesive



2. Adhesive Import and Export

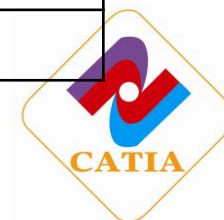
Tab. 3 Adhesive import and export during 2010-2012

类别 时间	Import				Export			
	Volume		Value		Volume		Value	
	1,000 tons	Growth Rate (%)	Billion USD	Growth Rate (%)	1,000 tons	Growth Rate (%)	Billion USD	Growth Rate (%)
2010	202.5	22.95	1.696	45.21	326.4	18.95	1.026	31.03
2011	191.1	-5.63	1.961	15.63	356.2	9.13	1.238	20.66
2012	181.7	-4.92	2.209	12.65	368.8	3.54	1.315	6.22

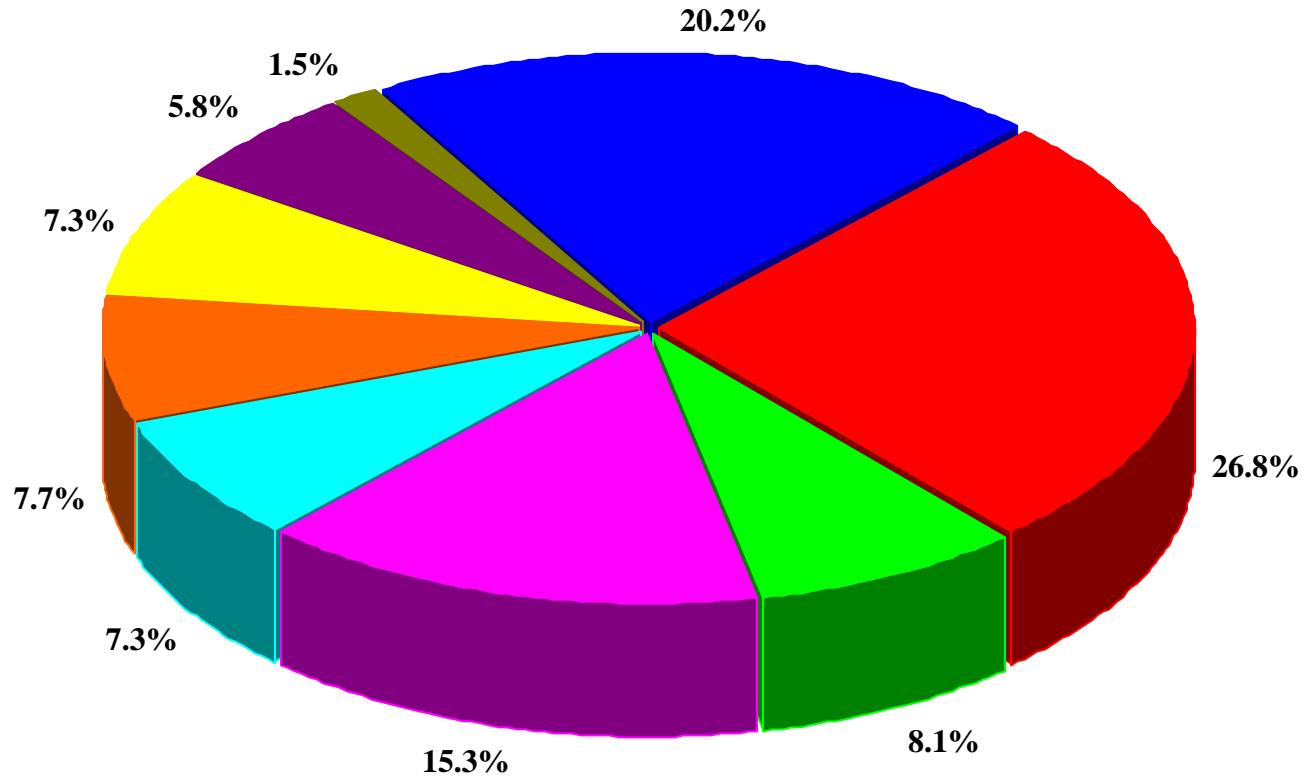
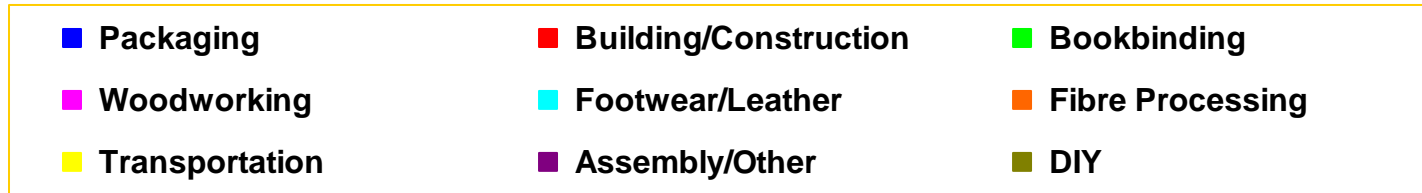
3. Adhesive Market Segments

Tab. 4 Market segments consumption and share in 2012

No.	Application Market	Consumption (1,000 tons)	Market Share (%)	Growth Rate (%)
1	Paper Converting and Book Binding	455	8.1	6.3
2	Packaging and Labelling	1,135	20.2	9.9
3	Fibre Processing	430	7.7	7.0
4	Transportation	410	7.3	12.0
5	Footwear and Leather	408	7.3	5.2
6	Consumer/Do-It-Yourself (Retail)	84	1.5	7.7
7	Building/Construction/Civil Engineering/Craftsmen	1,503	26.8	7.4
8	Woodworking and Joinery	856	15.3	7.7
9	Assembly Operations/Other	324	5.8	17.8
Total		5,605	100	--

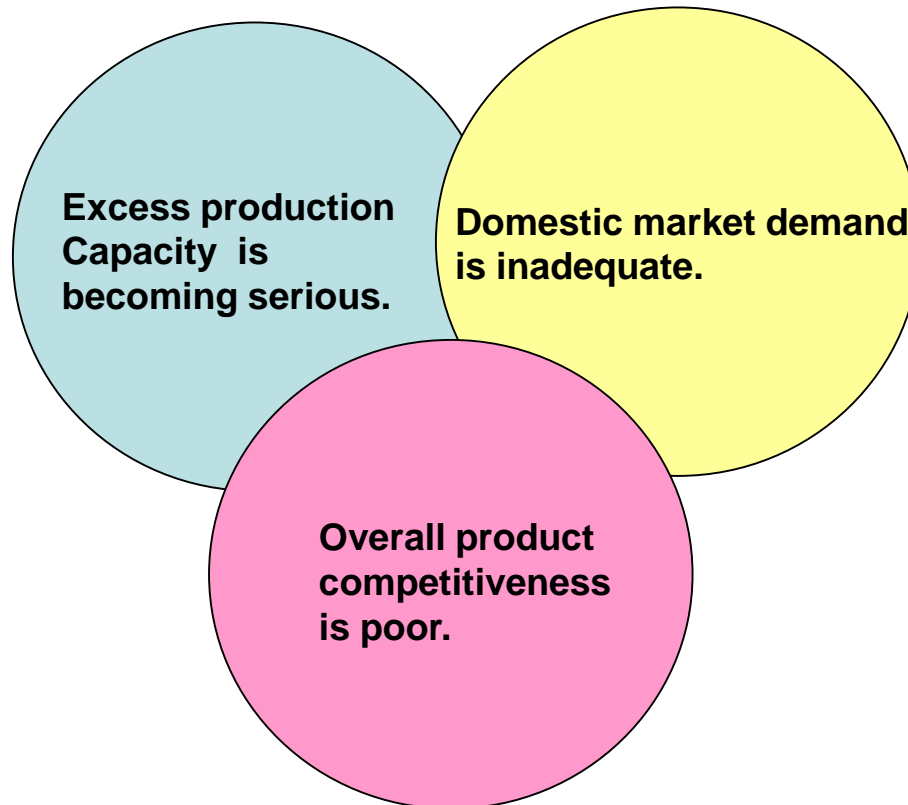


Chinese Adhesive Market Share in 2012



4. Adhesive Development Trend Analysis

1). Main problems of the industry



2). Development trend estimate for 2013



Industry economy has been running stably.

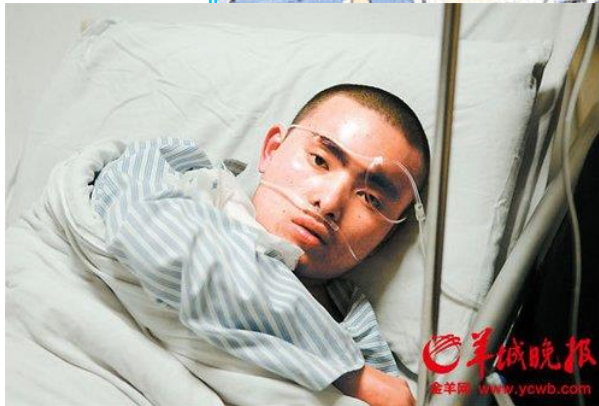


Overall price level has maintained stable.

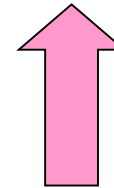


Enterprise performance has improved slowly.

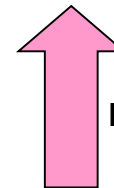
3). Environmental pressure and safety situation



Environmental friendly product



Enterprise



National Standard

Trade association

China Adhesives and Tape Industry Association

Thank You

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