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Construction Chemicals in China

Industry Study with Forecasts for **2012 & 2017**

Study #2420 | December 2008 | \$5100 | 251 pages

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INDUSTRY STRUCTURE

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Factors driving growth include an increase in both new construction and improvement and repair projects, as well as a higher volume of chemicals used to improve construction quality.

Demand in China to grow 10.1% yearly through 2012

Demand for construction chemical products used in on-site applications in China is forecast to approach ¥40 billion in 2012, expanding 10.1 percent per annum from 2007. Growth will be driven by an increase in both new construction, and improvement and repair projects. These advances will in turn be fueled by continuing industrialization and urbanization in China.

A focus on improving the general quality of construction will also boost gains by increasing the volume of chemicals used in construction applications, as well as spurring demand for higher priced, value added types. Production cost increases will contribute to growth in value terms, although competition within the industry will prevent suppliers from fully passing these effects through to end users. A slowdown in urban real estate markets in China -- characterized by falling prices and difficulties for developers in accessing credit -- will result in a deceleration in construction expenditure gains, and associated chemical product sales, from levels seen over the past decade.

Protective coatings and sealers to be fastest growing product segment

Caulks and adhesives will remain the largest construction chemical product category in 2012, accounting for about 40 percent of total industry sales.

Construction Chemical Demand in China, 2012 (39.8 billion yuan)

Caulks & Adhesives
39%

Cement & Asphalt Additives
29%

Protective Coatings & Sealers
22%

Polymer Flooring 6%

Other 3%

Demand will be driven by continuing increases in the number of fenestration products and plumbing fixtures per structure in China, as well as by the use of high performing adhesives in place of mechanical fasteners. Cement and asphalt additives will be the second largest product category in China in 2012, with sales benefiting from increasing paved surface and high-rise building construction. Protective coatings and sealers will be the fastest growing major product segment, with advances primarily deriving from improvements in the quality of construction in China. Polymer flooring will also see strong gains, driven by increasing penetration of these products in high-end residential and commercial car park applications, as well

as by continuing investment in industrial construction. Demand for sprayed polyurethane foam will be boosted by its increasing usage in insulation applications.

Central-East to remain largest regional market

The Central-East, the region at the forefront of China's economic growth over the past decade, will continue to account for the largest portion of chemical product demand going forward. The relatively underdeveloped western regions of China will see fast gains, mainly due to government efforts to divert investment into these areas.

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Sample Text, Table & Chart

MARKETS

Residential Building

Demand for construction chemicals used in the residential market in China will climb to 2017, driven by the construction of advanced housing. Modernization continues in China, as well as the construction of new housing which will require greater use of construction chemicals. Residential building construction is a major mode of economic growth, and historical performance levels are high. Rising construction expenditures as house prices rise, and rising real estate prices cause potential buyers to postpone their purchase decisions, restraining demand for new residential units.

China's urban housing stock primarily consists of apartments with ten or more floors dating from the 1980s onwards, and older four- to eight-floor structures. The urban housing stock also contains a small share of single-unit housing, mainly consisting of a shrinking number of traditional courtyard housing units, as well as high-end villas in small but rapidly expanding wealthy suburbs outside major urban centers such as Beijing; Shanghai; and Shenzhen, Guangdong. Most new urban housing development is undertaken by large construction contractors, using large numbers of migrant laborers. The urban sector, characterized by rising income levels and fast modernization of lifestyles, will continue to drive the Chinese construction chemical market.

China's rural housing stock is much more primitive, and is primarily made up of single-floor units constructed by local village residents. Larger villages and townships in rural China, as well as large industrial facilities which feature staff accommodation, often feature multiple family units similar to the four- to eight-floor structures found in urban areas. These residences will usually be constructed by small, local construction firms and typically feature a lower intensity of chemical use than construction projects in cities. The rural residential building stock also

98

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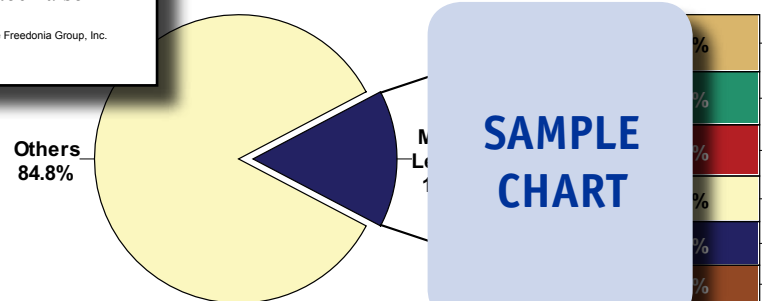
TABLE III-2
CAULK & ADHESIVE DEMAND IN CHINA
BY MARKET, SEGMENT & TYPE
(million yuan)

Item	1997	2002	2007	2012	2017
Construction Expenditures (bil ¥)					
¥ caulk & adhesive/000¥ construct					
Caulk & Adhesive Demand					
By Market:					
Residential					
Nonresidential					
Nonbuilding					
By Segment:					
New Construction					
Improvements & Repairs					
By Type:					
Caulks					
Adhesives					

**SAMPLE
TABLE**

CHART VI-1

CONSTRUCTION CHEMICAL MARKET SHARE
IN CHINA BY COMPANY, 2007
(24.6 billion yuan)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-9

NONBUILDING CONSTRUCTION CHEMICAL DEMAND IN CHINA BY TYPE (million yuan)

Item	1997	2002	2007	2012	2017
Nonbuilding Construction (bil ¥) ¥ chemical/000¥ construction					60 4
Construction Chemical Demand	2				50
Caulks & Adhesives					00
Cement & Asphalt Additives					00
Protective Coatings & Sealers					00
Polymer Flooring					25
Other					25

**SAMPLE
TABLE**

COMPANY PROFILES

Antas Chemical Company Limited

1/F, 8 Jiangong Road
West Zhongshan Avenue
Tianhe Hi-Tech Industrial Park
Guangzhou 510665
China
86-20-8557-6000
<http://www.antas.com.cn>

Annual Sales:
Employment:
Key Products:

International Contact: 86-20-8557-6000

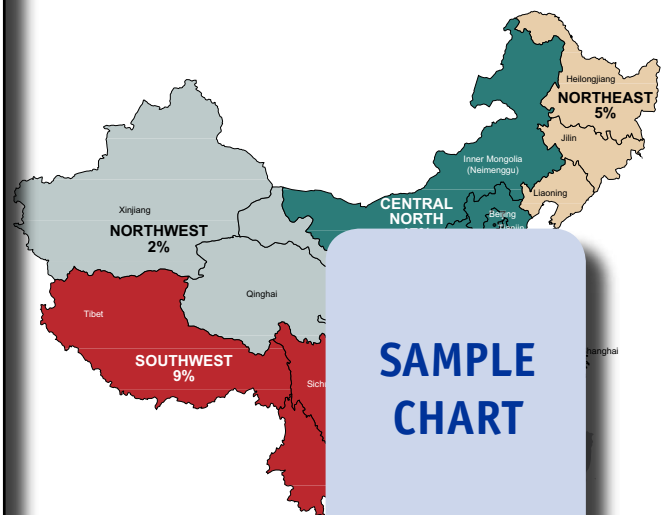
**SAMPLE
PROFILE**

Antas Chemical is a manufacturer and distributor of sealants and undercoatings for the construction, container and automobile industries in China. The Company, which is privately held, operates a 20,000-square-meter facility in Conghua, Guangzhou.

The Company serves the construction industry through the production of more than 40 types of sealants sold through the ANTAS, LEBOL and LEJAR product lines. Among these products are silicone, polyurethane, butyl rubber and neoprene sealants that are formulated specifically for construction operations. In general, Antas Chemical's sealants can be used for both interior and exterior applications, including sealing and joining of stone, wood, concrete, metal, glass and aluminum surfaces. Examples of ANTAS sealants include ANTAS 103, an acetic-cure silicone sealant suitable for use on glass and aluminum alloy surfaces, such as window joints; ANTAS 101, a moisture-curing polyurethane sealant that offers good thixotropy and elasticity; ANTAS 133, a one-component butyl rubber sealant specifically designed for

CHART V-1

CONSTRUCTION CHEMICAL DEMAND IN CHINA BY REGION, 2007 (24.6 billion yuan)



**SAMPLE
CHART**

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OTHER STUDIES

World Cement & Concrete Additives

Global demand for cement and concrete additives will rise 6% yearly through 2012. Gains will be driven by more penetration of chemical and fiber additives in concrete construction, in both emerging markets in Asia and Eastern Europe as well as the more mature cement industry in North America. This study analyzes the \$12.1 billion world cement and concrete additive industry, with forecasts for 2012 and 2017 by type, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2425 12/2008 \$5700

World Flooring & Carpets

World floor covering demand will rise 4% yearly through 2012, driven by nonresidential building construction in less developed areas. Nonresilient flooring will stay the largest product segment and grow the fastest. China will remain the largest national market and account for 43% of total gains. This study analyzes the 12.5 billion square meter world flooring and carpet industry, with forecasts for 2012 and 2017 by product, market, world region and for 32 countries. It also evaluates market share and profiles industry players.

#2417 12/2008 \$5800

Sealants & Caulks

US sealants and caulks demand will rise at an improved rate of 2.9% yearly through 2012. Gains will be driven by recoveries in the residential building and nonbuilding construction markets, and improved prospects for motor vehicles and aircraft. High performance materials such as silicones and polyurethanes will lead gains. This study analyzes the \$3.2 billion US sealants and caulks industry, with forecasts for 2012 and 2017 by material, type and market. It also evaluates market share and profiles major players.

#2393 09/2008 \$4600

Paint & Coatings

US demand for paint and coatings will rise 3.1% annually through 2012, aided by an improving outlook for construction and manufacturing activity and favorable export opportunities. A rebounding residential market will pace the dominant architectural paint segment, with interior paint outpacing exterior. This study analyzes the \$19.7 billion US paint and coating industry, with forecasts for 2012 and 2017 by market, application, end use and formulation. It also evaluates company market share and profiles industry players.

#2386 08/2008 \$4600

World Architectural Paints

Global demand for architectural paints will grow 3.9% annually through 2011. Gains will be paced by developing Asia/Pacific countries, especially China and India. Water-based paints will continue to supplant solvent-based types to claim 73% of demand. This study analyzes the 17.8 million metric ton world architectural paint industry, with forecasts for 2011 and 2016 by formulation, market, end use, world region and for 23 major countries. It also evaluates company market share and profiles major players.

#2311 02/2008 \$5600

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