

# Afera's Global Adhesive Tape Summit 2018

## CATIA Introduction and Market Overview

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**China Adhesives and Tape Industry Association (CATIA)**



# Agenda

**1. CATIA Introduction**

**2. Overview of China Adhesive Tape Market**

**3. China Adhesive Tape Outlook**



# 1. CATIA Introduction

On Sept. 7, 1987, China National Adhesives Industry Association (CNAIA) was founded in Beijing.

The 6th World Adhesive Conference was convened in Beijing.



1987

2004

2015

2017

CATIA was awarded again as AAAA Grade by Ministry of Civil Affairs.

The 30th anniversary celebration of CATIA was held in Shanghai.

1997

1997

The 1st China International Adhesive and Sealant Exhibition was organized with cooperation of CCPIT Sub-Council of Chemical Industry.

2012

The association was renamed as China Adhesives and Tape Industry Association (CATIA) since 2012.

2016

Global Tape Forum/Global Test Methods Committee Meetings & CATIA Technical Conference 2016 was held in Beijing.

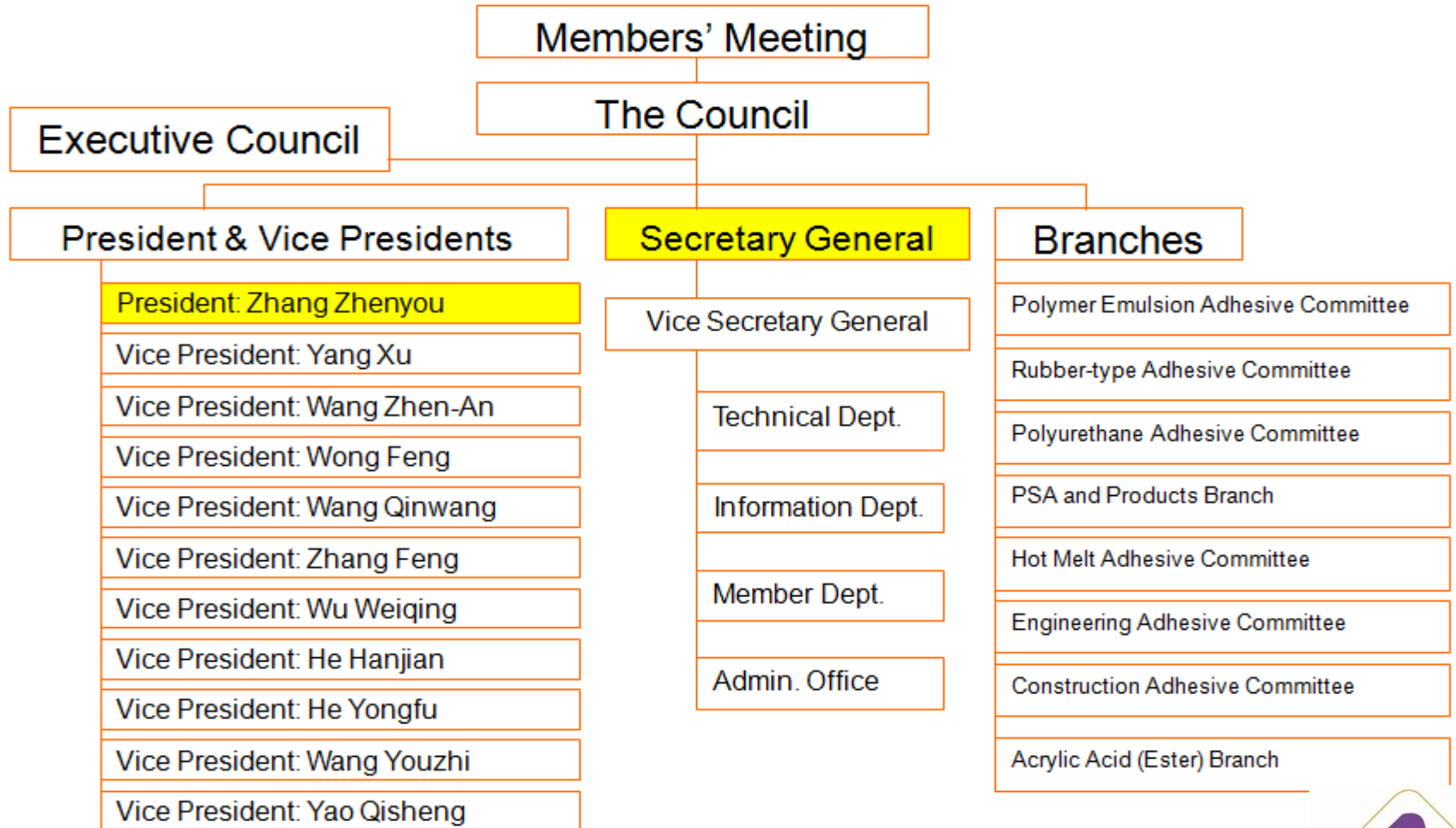
2018

2018

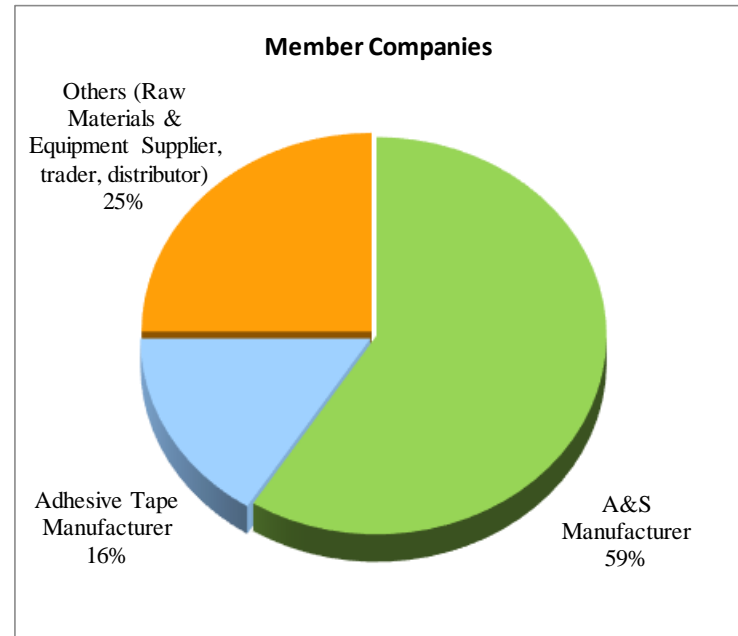
The 6th Conference of Asia Regional Adhesive Council will be organized by CATIA in September, 2018.



# Structure of CATIA



# CATIA Member Companies



There are 369 member companies till today.



## CATIA Member Service

### Service

1

New member registration, management, and service

2

Production data collection and analysis

3

Receive members' visit and provide consultation service

4

Encourage and support members' application for quality, famous brand evaluation

5

Anti-dumping, anti-trust investigation case

6

Market investigation and report

# Exchange Platforms of CATIA

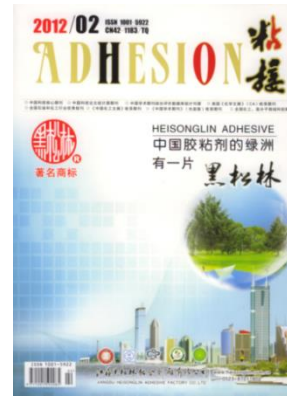
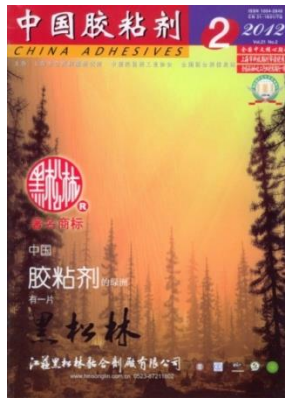
Website

[www.cnaia.org](http://www.cnaia.org)



WeChat

Magazine



Member List

Member newsletter, news release



## Business Activities of CATIA in 2017



**The 20th China Adhesive and Tape Annual Conference, August 2017, Shanghai**

**The 20th China International Adhesive and Sealant Exhibition, August 2017, Shanghai**





# Business Activities of CATIA in 2017 (Cont'd)

2017 China Hot-melt Adhesive Forum

**March**



5th Engineering Adhesives Technology and Information Conference

**April**



6th China Acrylic Acid & Ester Market and Application Forum

**June**



6th Construction Adhesives Technology and Information Conference

**October**



2nd China Self-Adhesive Label Forum

**November**



5th Adhesion Technology Short Course

**December**



**June 13, 2018, Munich**





**The 6th Conference of Asia Regional Adhesive Council  
The 21st China Adhesive and Tape Annual Conference**

*Main Theme: New Technology Inspires The Future*

**September 17-19, 2018 (Monday - Wednesday)  
Shanghai, China**

[www.arac2018.org](http://www.arac2018.org)



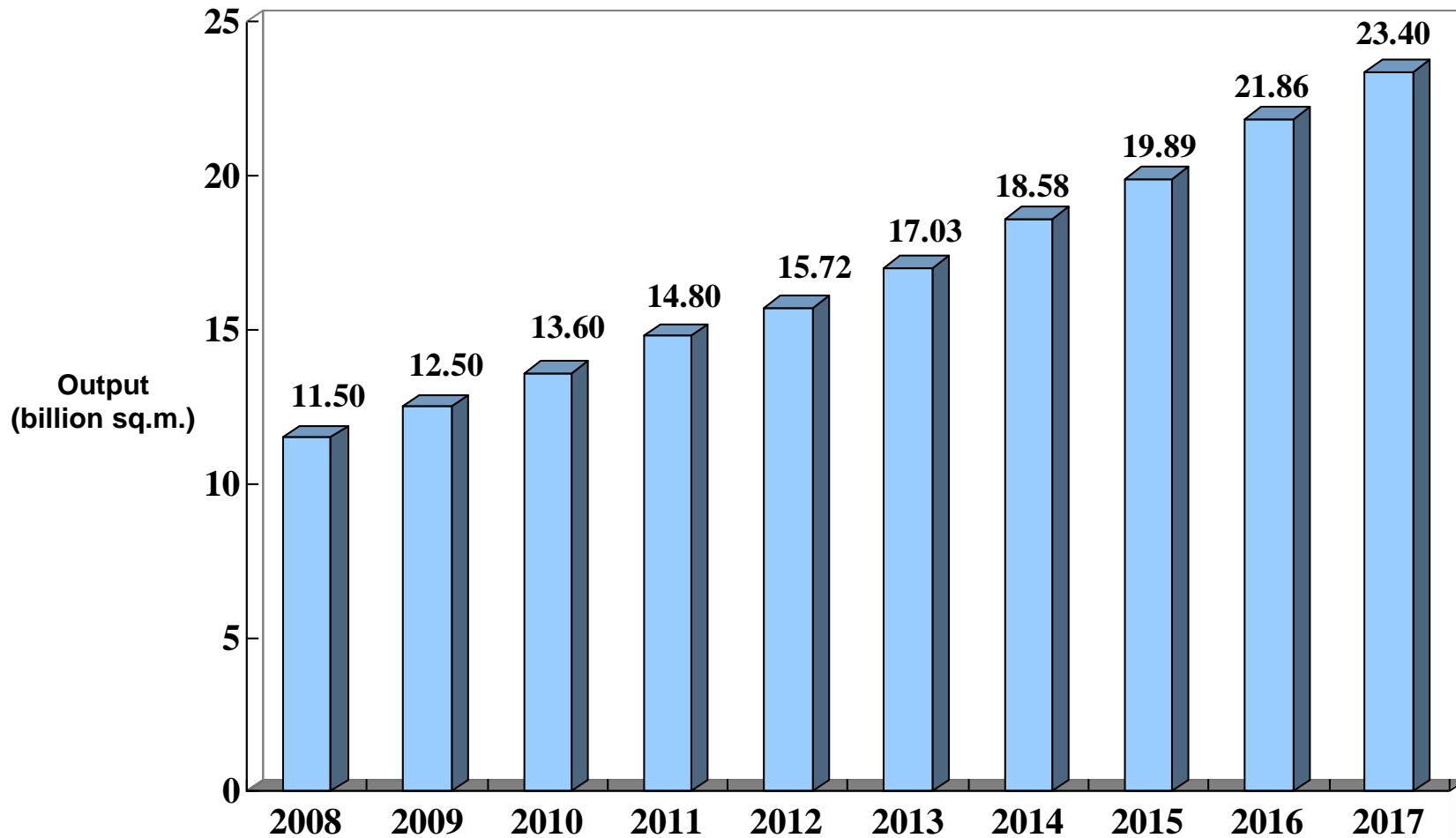
## 2. Overview of China Adhesive Tape Market

Rapid development of building materials, automotive, food, daily chemical, electronics, logistics, communications, medical, protection and packaging areas

Use of new material, hot melt type or UV curable PSA, new coating technology, automatic processing equipment

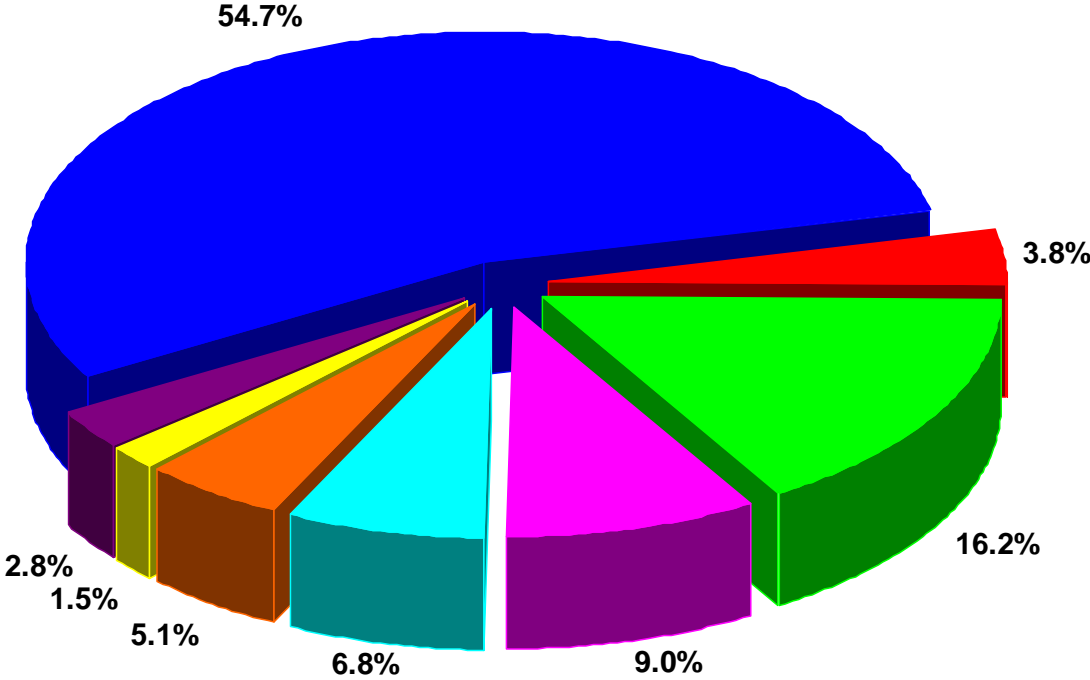


## Rapid Growth of China Adhesive Tape in Ten Years



# China Tape Market by Product Segment in 2017

- |                       |                            |                      |                           |
|-----------------------|----------------------------|----------------------|---------------------------|
| ■ BOPP Packaging Tape | ■ PVC Electrical Tape      | ■ Label & Graphics   | ■ Protective Tape         |
| ■ Double-Sided Tape   | ■ Crepe Paper Masking Tape | ■ Aluminum Foil Tape | ■ Specialty Tape & Others |



*(Percent in sq.m. of production)*



## China Tape Product Growth Statistics in 2017

		Growth Rate in Sales Value
BOPP Packaging Tape	6.7%	1.1%
PVC Electrical Tape	-9.2%	-9.6%
Label & Graphics	11.8%	9.3%
Protective Tape	6.6%	6.1%
Double-Sided Tape	-0.6%	-3.3%
Crepe Paper Masking Tape	27.7%	14.3%
Aluminum Foil Tape	-5.3%	-7.4%
Specialty Tape & Others	12.1%	7.7%

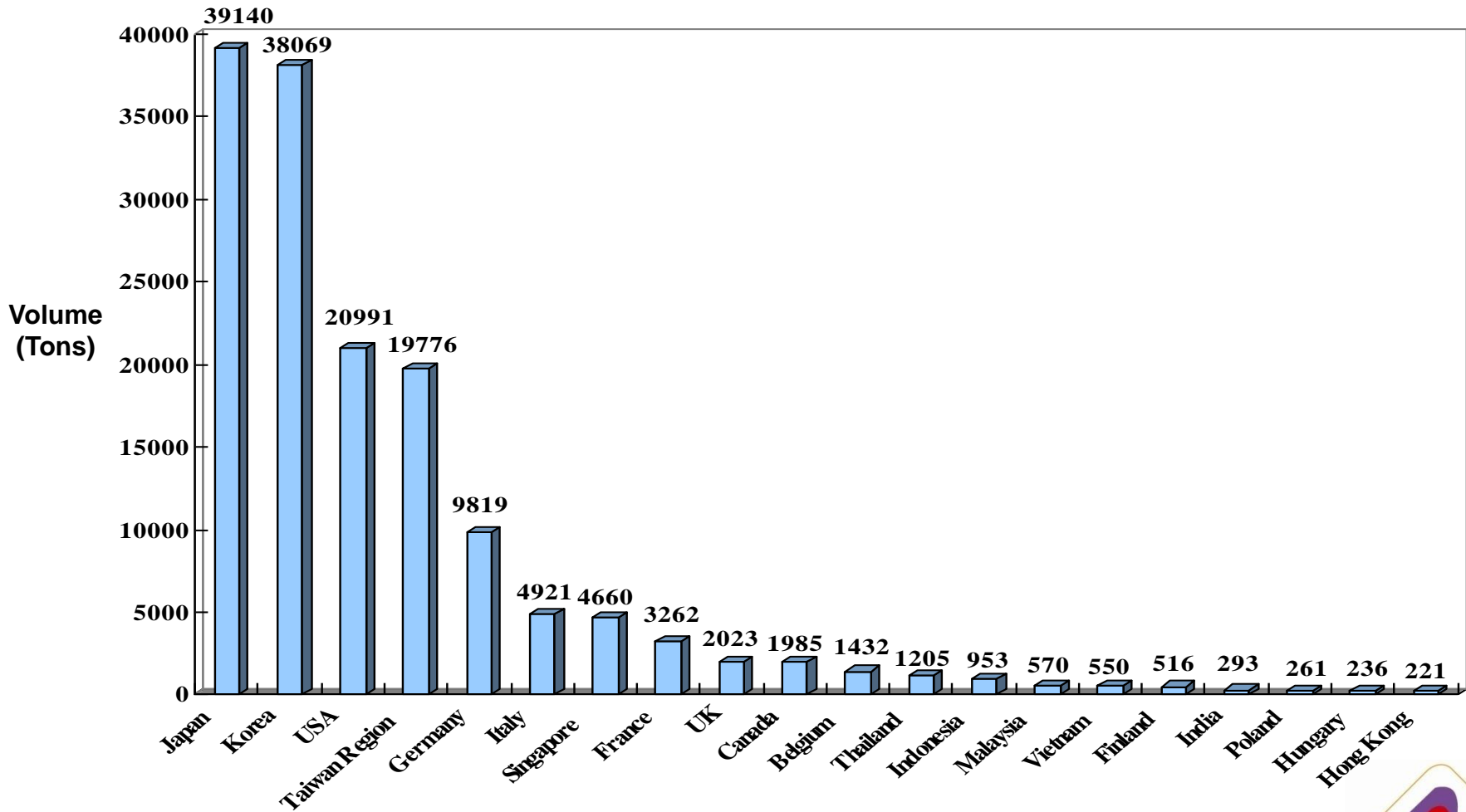
*(Growth rate in sq.m. of production)*



## Import and Export of Adhesive Tape

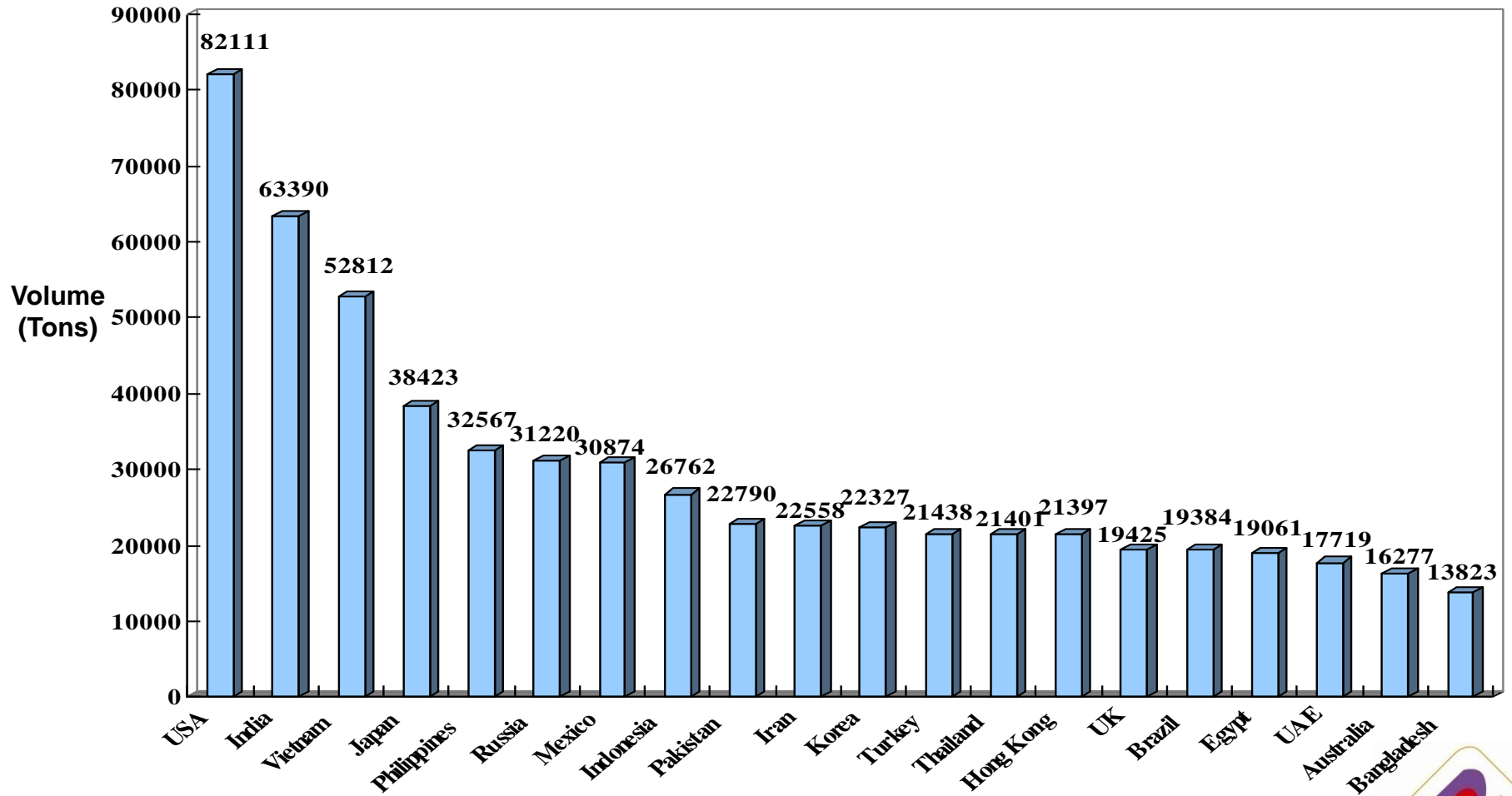
Year	Import				Export			
	Volume		Value		Volume		Value	
	1,000 tons	Growth Rate (%)	Billion USD	Growth Rate (%)	1,000 tons	Growth Rate (%)	Billion USD	Growth Rate (%)
<b>2013</b>	157.2	5.3	3.401	9.2	760.9	2.8	3.227	8.1
<b>2014</b>	159.4	1.4	3.294	-3.2	823.1	8.2	3.619	12.2
<b>2015</b>	147.5	-7.5	3.071	-6.8	852.0	3.5	3.641	0.6
<b>2016</b>	146.2	-0.9	2.872	-6.5	930.5	9.2	3.487	-4.2
<b>2017</b>	157.6	7.8	3.022	5.2	1015.1	9.1	3.746	7.4

# Top 20 Sources of China Tape's Import in 2017





# Top 20 Sources of China Tape's Export in 2017



## Financial Statements of Listing Companies (Main Board) in 2017

	Revenue	Growth Rate	Gross Profit	Growth Rate	Main Business Income Statement
Company 1	<b>11.789 B. RMB</b>	<b>27.69%</b>	<b>2.474 B. RMB</b>	<b>26.06%</b>	Optical film (display optical film, building/furniture decoration film, auto/building window film, hard coating film, protective film, specialty tape) increased 81.40%, printing and packaging film (pre-coating film) increased 16.50%.
Company 2	<b>2.512 B. RMB</b>	<b>1.87%</b>	<b>105.7 M. RMB</b>	<b>-15.89%</b>	Composite plastic woven material, high barrier nylon film and heat shrinkable smoke film increased 1.30%. Polarizing film, coarsening electric film and high temperature resistance capacitor film increased 8.71%.
Company 3	<b>2.064 B. RMB</b>	<b>24.48%</b>	<b>172.5 M. RMB</b>	<b>244.05%</b>	Significant growth was contributed to consumer electronics, optoelectronic display and new energy lithium batteries. Functional electronic adhesive film and aluminum plastic film for lithium battery increased 26.49%. Purification project contract business increased 13.94%.



## Financial Statements of Listing Companies (Main Board) in 2017 (Cont'd)

	Revenue	Growth Rate	Gross Profit	Growth Rate	Main Business Income Statement
Company 4	2.060 B. RMB	18.39%	52.8 M. RMB	-51.36%	PSA increased 39.62%, finished paper increased 68.79%, carbonless paper increased 14.61%.
Company 5	1.306 B. RMB	26.24%	122.1 M. RMB	47.33%	Wound care dressings increased 7.00%. Surgical sense control products increased 41.34%.
Company 6	727.5 M. RMB	10.78%	41.6 M. RMB	-19.36%	Crepe paper masking tape increased 2.75%. Double-sided tape for electronics increased 23.89%.
Company 7	642.9 M. RMB	17.08%	36.3 M. RMB	-44.03%	Car body sticker increased 65.22%. One way vision film increased 19.88%.

## Other Listing Companies (NEEQ)

Company	Business Scope	Website
Weifang Shengda Technology Co., Ltd.	Removable plastic protective film, PSA	<a href="http://www.wfsdkj.com">www.wfsdkj.com</a>
Huizhou Haoming Technology Co., Ltd.	Self-adhesive label	<a href="http://www.hzhaoming.com">www.hzhaoming.com</a>
Suzhou Bridge Electronic Co., Ltd.	Photoelectric protection film, insulation tape for auto	<a href="http://www.szbridge.com">www.szbridge.com</a>
Suzhou Kuaner New Material Technology Co., Ltd.	Electronics label material	<a href="http://www.kuaner.cn">www.kuaner.cn</a>
Guangdong Yuehui Technologies Co., Ltd.	Tape series	<a href="http://www.shenghuigd.com">www.shenghuigd.com</a>
Jiangxi Banglida Technology Co., Ltd.	Release film, protective film	<a href="http://www.jxbanglida.com">www.jxbanglida.com</a>
Tianjin Tianyuan Electronic Material Co., Ltd.	Polyimide film with FEP adhesive	<a href="http://www.tj-polyimide.com">www.tj-polyimide.com</a>
Taicang Zhanxin Adhesive Material Co., Ltd.	OCA film, optical protective film, tape	<a href="http://www.zhanxin.com.cn">www.zhanxin.com.cn</a>
Haoneng Industries Co., Ltd.	Aluminum foil label, PSA label	<a href="http://www1.haoneng.net">www1.haoneng.net</a>
Yantai Hongqing Packing Material Co., Ltd.	BOPP thermal laminating film, PET film	<a href="http://gb.ythongguang.cn">http://gb.ythongguang.cn</a>
Ningbo Jixiang Plastic Science & Technology Co., Ltd.	Tape series	<a href="http://www.nbjxsj.com">www.nbjxsj.com</a>
Shenzhen Shunxinchang Printing Co., Ltd.	Self-adhesive label	<a href="http://www.shunxinchang.com">www.shunxinchang.com</a>
Henan Yulan Optoelectronics Co., Ltd.	Photoelectric protection film	<a href="http://www.yulantape.com">www.yulantape.com</a>



## Tape Standards Implemented during 2017-2018

1. **GB/T 33332-2016**  
Test method for dynamic shear strength of adhesive tapes, implemented on July 1, 2017.
2. **GB/T 33375-2016**  
Measurement for electrostatic properties of adhesive tape, implemented on July 1, 2017.
3. **GB/T 34712-2017**  
Determination for the flagging of adhesive tape, implemented on May 1, 2018.
4. **HG/T 3949-2016**  
Masking tape, implemented on April 1, 2017.
5. **HG/T 5055-2016**  
Adhesive tapes for electrode protect in lithium battery, implemented on April 1, 2017.



### 3. China Adhesive Tape Outlook

E-commerce promotes significantly courier delivery services in China. Crazy data of courier delivery volume: 40.01 billion parcels in 2017, growing 28%. Express package consumes huge quantity of OPP packaging tape. No one doubts the further development of E-commerce.

Chinese automobile production and sales exceeded 29.0 million vehicles in 2017, ranking first in the world for 9 consecutive years. The automotive industry is expected to grow stably and offers great opportunities for adhesive tape application.

Electronics and electrical appliances – the proportion of high value-added tape products is increasing.



## **Industry Development Trend Analysis During the 13th-Five-Year Plan (2016-2020)**

1. The rapid rise of emerging markets will promote functionalization and high-end orientation of tape industry products.
2. The technological innovation of raw materials and diversification of supply will improve the tape industry profitability.
3. Safety, environmental protection, energy conservation and emission reduction will promote industrial upgrading of adhesive tape.
4. Global economic integration and downstream application market transfer will promote the international development of tape industry products.
5. Standard system of tape industry will improve gradually, leading, restricting and normalizing the industry development at a high level.



## Market Drivers

- Water-borne, hot melt, solvent-free, UV curing, high solid content products, are future direction of encouragement and investment.
- Strategic emerging markets, such as high-speed rail, city rail transit, auto lightweight and after-market repair, industrial assembly automation, prefabricated housing industrialization, intelligent terminal equipment, aviation and space, handheld device and display, green packaging material, medical PSA tape products, will raise the demand for adhesive tape products.
- Enterprise merger, acquisition, expansion and newly construction are increasingly active, capital is quite adequate, and investment prospect is promising.
- Technological innovation, technical progress, cooperation and win-win are the mainstream of future development.





## Outlook of China Tape Industry

- Scale trend of the industry is obvious, enterprise products will be multi-functional, upstream and downstream industry chains will extend, cost control strategy will become the mainstream.
- Industry competition pattern: only backward capacity, no excess capacity.
- The industry will maintain a growth rate higher than the GDP: steady progress, improved quality and efficiency.



***Thank You***

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