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# **ASIAN ADHESIVES & SEALANTS**

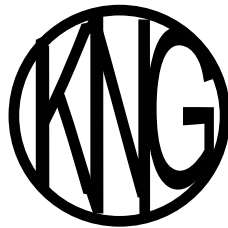
**2008-2013**

## **A Multiclient Study Prospectus**

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Kusumgar, Nerlfi & Growney is pleased to announce their newest technical and business multiclient market research study, **ASIAN ADHESIVES & SEALANTS**. This in-depth technical and economic analysis will provide subscribers with detailed information on formulated adhesive and sealant consumption by country, end use, and technology. Information on the supplier structure of adhesive and sealant formulators by country will be provided. The study compliments several of our published reports including **ADHESIVES IN DEVELOPING REGIONS** (2003), **THE ASIAN COATINGS INDUSTRY** (2005), and **ASIAN COATING ADDITIVES** (2008).

The study will characterize formulated adhesive and sealant consumption by end use and technology for base year 2008, and provide projections for usage in 2013. Materials, technologies, competitive dynamics, supplier structure, and industry concentration via mergers and acquisitions will be evaluated.



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## A CHANGING REGION

Asia has some three billion inhabitants and a combined gross domestic product (GDP) of some \$14 trillion. The region is a mix of modern industrialized countries and emerging economies. Japan, Australia, and South Korea are the most developed countries in the region with mature growth outlooks. China is at the other extreme, with an economy rapidly expanding at about 10% per year. The Asian region consumes some \$10 billion worth of formulated adhesives and sealants. Growth in developing economies of the region is high as industrial output and construction activity continues to expand.

Australia, Japan, Taiwan, and South Korea are the more developed countries in Asia. Japan has the largest economy, representing about one-third of the region's GDP total. Like Europe and North America, adhesive and sealant growth in Japan is largely tied to its mature economy. The economies of Australia, South Korea and Taiwan are also mature and together comprise 12% of the regions GDP. China and India are the world's most populous countries. They contain about three-quarters of the regions inhabitants, but currently represent less than one-quarter of the total GDP output. The economies in China and India have surged, fueled in part by strong construction activity and the investment in manufacturing facilities. Rising standards of living and a growing middle class are increasing the domestic consumption of goods.

Asia is the world's largest producer of cars, capturing about 40% of the world's production in units. Automotive adhesive and sealant usage in China and India is fast growing. Vehicle production in China is largely through ventures with Japanese, Korean, and western car companies; adhesive and sealant usage per vehicle is growing. In contrast to China and India, Japan and South Korean vehicle output and adhesive and sealant consumption is mature.

Asia is a leading producer of the world's wood furniture. China in particular has seen enormous growth; Vietnam production is exploding, but from a much smaller base. Woodworking adhesive growth in emerging economies of the region is robust. Infrastructure and home building in many Asian countries is also growing rapidly as are construction adhesives and sealants. Flooring adhesives, pipe cement, panel and framing adhesives, etc. are largely used in the mature economies, as are construction sealants. Construction adhesives and sealants continue to expand in developing countries.

Japan and China are the largest consumers of packaging adhesives in the region with Japanese growth sluggish while China's growth is some five times higher. Excluding flexible packaging, water-based and hot melts types are essentially all of the volume. Flexible packaging largely employs solvent-based adhesives: rapid growth continues in India and China. Most of the adhesives for pressure sensitive products are consumed in Japan, China, and Taiwan. Together they consume for over 80% of the pressure sensitive adhesive dollars. Water-based acrylics are most of the volume followed by solvent-based acrylics, solvent-based rubbers, and hot melts.

## **THE STUDY**

**ASIAN ADHESIVES & SEALANTS** will characterize consumption in 2008 and estimate usage in 2013. The report will provide a comprehensive analysis of adhesives and sealants and their technologies in the Asian region. An Executive Summary will give subscribers a concise, easy to read representation of individual country consumption and end use markets. A thorough business analysis will be provided which includes profiles of leading suppliers. Significant trends, new developments, regulatory implications, mergers and acquisitions, and technology will be covered.

Subscribers will find **ASIAN ADHESIVES & SEALANTS** the definitive reference work. Current participants, and those contemplating entry, will find the study essential in their planning process. Firms contemplating introducing new materials and technologies will find the study particularly attractive. The report will accurately portray adhesive and sealant consumption in the individual countries and provide critical insight into future developments.

## **METHODOLOGY**

**ASIAN ADHESIVES & SEALANTS** will be based on over 200 interviews with formulators, raw material suppliers, end users, trade associations, and governmental agencies. Additionally, current literature, company web sites, government web sites and reports, etc. will be reviewed and analyzed. Kusumgar, Nerlfi & Growney's extensive knowledge of the adhesive and sealant industries, gained over the past three decades, insures an accurate and comprehensive report

## **COMPLETION**

**Kusumgar, Nerlfi & Growney** plans on initiating research on **ASIAN ADHESIVES & SEALANTS** in the first quarter of 2008. Completion of the study is expected year end 2008. The final study will be approximately 400 pages in length.

# **TENTATIVE TABLE OF CONTENTS**

## **FOREWORD**

## **TABLE OF CONTENTS**

## **SCOPE AND EXPLANATION ON HOW TO USE THIS REPORT**

## **ABBREVIATIONS**

## **EXECUTIVE SUMMARY**

- Country Overview
- Adhesive End Use Review
- Sealant End Use Review
- Supplier Structure, Formulators
- Country Comparisons
- Significant Trends

## **BUSINESS ANALYSIS**

- Overview
- Technology Assessment
- Supplier Structure
- Supplier Profiles
- Mergers and Acquisitions

## **COUNTRY CONSUMPTION**

- Australia & New Zealand
- China
- India
- Indonesia
- Japan
- Malaysia
- Philippines
- Singapore
- South Korea
- Taiwan
- Thailand
- Vietnam

## **TENTATIVE TABLE OF CONTENTS (Continued)**

### **END USES**

#### **Adhesives**

- Automotive
- Bookbinding
- Construction
- Consumer
- Packaging
- Pressure Sensitive
- Product Assembly
- Woodworking/Furniture
- Other

#### **Sealants**

- Automotive
- Construction
- Other

### **ADHESIVE & SEALANT TYPES**

- Acrylic
- Cyanoacrylate & Anaerobic
- Emulsion
  - Acrylic
  - Vinyl Acetate Polymers
  - Other
- Epoxies
- Ethylene-Vinyl Acetate Copolymers
- Polychloroprene
- Polyurethane
- Silicone
- Styrenic Block Copolymers
- Other

### **RESPONDENTS, INDEX**

## **OUR QUALIFICATIONS**

Kusumgar, Nerlfi & Growney is a consulting firm specializing in market research and business analysis for the polymer and chemical industries. Members of the firm possess some 70 years of experience analyzing the coating, ink, adhesive, and sealant industries. Kusumgar, Nerlfi & Growney is dedicated to providing comprehensive and accurate information and insight on technology driven markets.

The information and analysis contained in **ASIAN ADHESIVES & SEALANTS** will be developed by Michael Growney, Steven Nerlfi and Minesh Kusumgar. No outside contractors will be employed. Our expertise has been gained from conducting over 35 multiclient, and numerous proprietary, studies.

## **ADDITIONAL SERVICES**

Kusumgar, Nerlfi & Growney's current project is **ASIAN COATING ADDITIVES**. The study will characterize additive consumption in Asia by country and type. Biocides, dispersants, foam control, rheology modifiers, slip/rub materials, UV stabilizers, and wetting agents will be covered in the report. Completion of the study is expected in early-2008.

Our newest study is **THE U.S. PAINT & COATINGS INDUSTRY, 2006-2011**. This study provides detailed information on paint and coating consumption by end use, technology, and base resin binder. Interested parties should contact Kusumgar, Nerlfi & Growney for brochures and additional information. Kusumgar, Nerlfi & Growney welcomes inquiries for projects of a proprietary nature.

## **SUBSCRIPTION INFORMATION**

**ASIAN ADHESIVES & SEALANTS** is available through subscription. Completion of the study is expected year-end 2008. The price of the study is \$9,000 to early subscribers; \$10,500 to those subscribing while in progress; and \$12,000 for post publication subscription. Subscribers will receive five copies of the report. To subscribe, please complete the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please contact Kusumgar, Nerlfi & Growney at 973/439-0030 or [nerlfikng@cs.com](mailto:nerlfikng@cs.com). Additional information about Kusumgar, Nerlfi & Growney can be obtained at our web site: [www.kusumgar-nerlfi-growney.com](http://www.kusumgar-nerlfi-growney.com).

# CONTRACT FOR THE ASIAN ADHESIVES & SEALANTS

## KUSUMGAR, NERLFI & GROWNEY

One DeBaun Avenue C  
West Caldwell, NJ 07006

Please initiate our participation in **ASIAN ADHESIVES & SEALANTS**. We understand our subscription entitles us to five copies of the final report.

We agree that for a period of three years from publication to:

1. Not reproduce the study, in whole or in part, by any means.
2. Restrict use of the study to our own employees.
3. Prevent the disclosure of its contents, to the best of our ability, to any other firm or person.

We understand that we may disclose the contents of this study to any firm that we own more than half of, or to a company that maintains more than a half interest in our firm. We may use or disclose any information in the study which is public knowledge, in our possession before receiving the report, or that has been obtained from third parties, but not from this study.

Kusumgar, Nerlfi & Growney will take reasonable precautions to prevent disclosure of the contents of this study, except to subscribers, for a period of three years after it is issued.

We understand the fee for **ASIAN ADHESIVES & SEALANTS** is \$9,000 for early subscription; \$10,500 during progress; and \$12,000 after publication.

Kusumgar, Nerlfi & Growney will invoice us for the full amount upon acceptance of our participation, after a countersigned copy of this contract is returned to us for our records. We will pay this invoice within thirty days.

**Accepted: Kusumgar, Nerlfi & Growney**

**Subscriber**

Signature

Signature

Name

Name

Title

Title

Date

Date

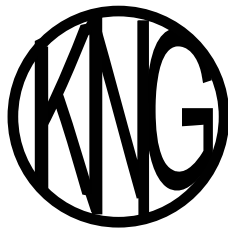
# **POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH**

## **ADDITIONAL SERVICES**

**ASIAN ADHESIVES & SEALANTS** is Kusumgar, Nerlfi & Growney's fourteenth multiclient study. Studies immediately available, or scheduled for completion, include:

- **ADHESIVES IN DEVELOPING REGIONS**, December 2003
- **ADDITIVES, 2003-2008**, September 2004
- **THE ASIAN COATINGS INDUSTRY**, September, 2005
- **RADIATION-CURED PRODUCTS**, July, 2006
- **THE U.S. PAINT & COATINGS INDUSTRY, 2006-2011**, Summer 2007
- **ASIAN COATING ADDITIVES**, Early 2008

Interested parties should contact Kusumgar, Nerlfi & Growney for subscription information. We also welcome inquires for projects of a proprietary nature.



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