



**MARKET INFORMATION
& APPLICATIONS OF
POLYIMIDE
VARNISH/ENAMEL**

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The background of the slide is a light gray gradient with several realistic water droplets of various sizes scattered across it. The droplets have highlights and shadows, giving them a three-dimensional appearance.

**POLYIMIDE
VARNISH & ENAMEL
MAJOR PLAYERS**

UBE

IST

ELANTAS

PICOMAX

SUZHOU JUFENG ELECTRICAL INSULATING SYSTEM

DANYANG SIDA CHEMICAL

SHANGHAI TONGHAO INDUSTRIAL TRADE

CHANGZHOU HONGBO PAINT

The background of the slide is a light gray gradient with several realistic water droplets of various sizes scattered across it. The droplets have highlights and shadows, giving them a three-dimensional appearance. The largest droplets are located in the top-left and bottom-right corners, while smaller ones are more numerous in the center and bottom areas.

APPLICATIONS

WIRE COATING

ELECTRICAL MACHINERY

AUTOMOBILES

AEROSPACE AND DEFENSE

SMART PHONES, OLED/LCD DISPLAY

The global Polyimide Varnish market is valued at 15 million US\$ in 2018 is expected to reach 24 million US\$ by the end of 2025, growing at a CAGR of 6.3% during 2019-2025.

MARKET SHARE OF POLYIMIDE VARNISH

THE MAJOR APPLICATIONS OF POLYIMIDE VARNISH ARE **WIRE COATING,**
AEROSPACE AND DEFENSE AND OLED/LCD DISPLAY. **AEROSPACE AND DEFENSE**
ACCOUNTED FOR THE LARGEST MARKET WITH ABOUT 47% OF THE GLOBAL
CONSUMPTION FOR POLYIMIDE VARNISH IN 2017.

TOP COMPANIES

THE TOP FOUR COMPANIES ACCOUNT FOR MORE THAN 76.37 % OF MARKET SHARE. UBE, IST, ELANTAS AND SUZHOU JUFENG ELECTRICAL INSULATING SYSTEM ARE THE TYCOONS OF POLYIMIDE VARNISH.

UBE IS THE LARGEST MANUFACTURER, WITH THE MARKET SHARE OF 25.6% IN 2017. THIRD, IN TERMS OF APPLICATION, POLYIMIDE VARNISH IS A KIND OF COATS. POLYIMIDE VARNISH HAS A VERY WIDE RANGE OF USES

POLYIMIDE AND SPECIALTY PRODUCTS CASE STUDY OF A COMPANY

NET SALES OF POLYIMIDES INCREASED SIGNIFICANTLY IN FISCAL 2017. FOR A LONG TIME, THE POLYIMIDE BUSINESS WAS **SLOW** THROUGH FISCAL 2016. DURING THIS TIME, THE COMPANY UNDERTOOK VARIOUS INITIATIVES SUCH AS **LOWERING DEVELOPMENT COSTS** BY FOCUSING ON CERTAIN AREAS OF DEVELOPMENT, RECORDING AN IMPAIRMENT OF FACILITIES, AND REDUCING TOTAL COSTS FOR THE BUSINESS. ON TOP OF THIS, **PROFITS IMPROVED** SIGNIFICANTLY DUE TO POSITIVE BUSINESS CONDITIONS, DRIVEN BY STRONG SHIPMENTS OF **SMARTPHONES AND GROWTH IN SALES OF OLED FLEXIBLE DISPLAYS.**

THE COMPANY IS PROJECTING THAT DEMAND FOR SMARTPHONES IN FISCAL 2018 WILL NOT REACH THE LEVELS IN FISCAL 2017. HOWEVER, THEY HAVE DEVELOPED PRODUCTS TO COMPENSATE FOR THE DROP IN SMARTPHONE DEMAND. THEREFORE, EXPECT TO BE ABLE TO JUST MATCH THE BUSINESS RESULTS THAT WAS RECORDED IN FISCAL 2017.

PROJECTING GROWTH IN **VARNISHES FOR OLED FLEXIBLE DISPLAYS, PARTICULARLY FOR THE CHINESE MARKET. THERE IS NEED TO** DEVELOP NEW FILM GRADES AND FILM GRADES THAT ARE COMPATIBLE WITH NEW PRODUCTION PROCESSES, WHICH WE WILL INTRODUCE OVER TIME.



QUESTIONS?

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