



China Biaxially Oriented Polypropylene (BOPP) Industry Report, 2010-2011

May 2011

This report

- ◆ Analyzes the status quo of China BOPP industry.
- ◆ Focuses on the China BOPP upstream and downstream industries.
- ◆ Highlights the operation of major manufacturers in BOPP industry.

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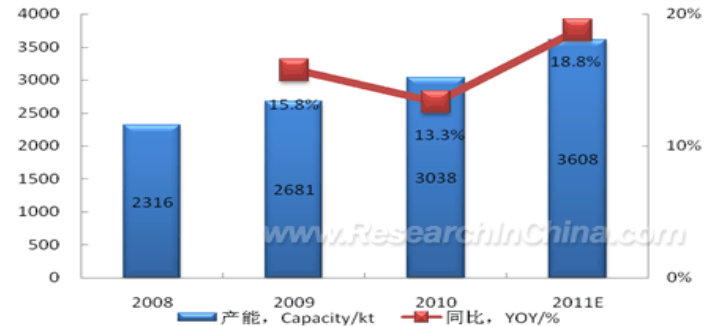
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Abstract

Biaxially oriented polypropylene (BOPP) is an excellent transparent flexible packaging material with good transparency, luster and moisture-resistance. It's widely used in packaging, printing, compounds and other fields.

In 2010, China's BOPP capacity reached 3.038 million tons, up 13.3% year on year. According to the projects under construction/planning announced by enterprises, China will increase the BOPP capacity of 570,000 tons in 2011; by then, the total capacity will be 3.608 million tons. However, the rapid growth of BOPP capacity has led to the declining industry profit, and many enterprises cannot make profits any more.

China's BOPP Capacity and YoY Growth Rate, 2008-2011
(Unit: 1,000 tons; %)



Source: ResearchInChina

Although BOPP is oversupplied in China, the domestic output of high-tech products (e.g., high-end capacitor film and film for cigarette packing) is still tiny, most of such products are imported. In response to severe competition, major companies in this industry such as Zhejiang Great Southeast Packaging and Foshan Plastics Group Co., Ltd. have started to develop high-end BOPP products to raise the gross margin and enhance competitiveness.

This report analyzes BOPP supply and demand, consumption structure, price trend, BOPP market segments, upstream and downstream industries, as well as operation, competitive advantages and development prospect of 9 major companies in this industry.

Foshan Plastics Group Co., Ltd. and Zhejiang Great Southeast Packaging are leaders in BOPP industry. The former accounted for 3.9% of the total capacity in 2010, and its capacity of BOPP film for cigarette packing reached 65,000 tons; it is the largest production company of BOPP film for cigarette packing in China. Zhejiang Great Southeast Packaging has a good product structure and strong profitability; in 2010, its main business achieved a gross margin of 16.4%.

Anhui Tongfeng Electronics Company Limited and Zhejiang Nanyang Technology Co., Ltd. are major capacitor film production companies. The former ranks first in capacitor film capacity in China, its capacity accounted for 19.4% of the total capacity in 2009. The latter achieved a main business gross margin of 37.1% by virtue of its high-end electronic film products in 2010.

Sichuan Dongfang Insulating Material Co., Ltd is China's first BOPP electrical film manufacturer. In 2010, its BOPP electrical film output was 4837.7 tons, and the sales-output ratio was 101.2%. It went public on May 20, 2011 to raise funds for its “3500 ton / year BOPP Electrical Film Technical Innovation” and other projects. With the release of new capacity, its competitiveness in BOPP electrical film market will be further enhanced.

1. Overview of BOPP

- 1.1 Definition and Properties
- 1.2 Classification and Application
- 1.3 Industry Chain

2. Chinese BOPP Market

- 2.1 Status Quo of China BOPP Industry
- 2.2 Supply
- 2.3 Consumption
- 2.4 Competition Pattern
- 2.5 Price
- 2.6 Market Segments
 - 2.6.1 BOPP Capacitor Film
 - 2.6.1.1 Market Analysis
 - 2.6.1.2 Development Trends
 - 2.6.2 BOPP Film for Cigarette Packing
 - 2.6.2.1 Introduction
 - 2.6.2.2 Market Analysis
 - 2.6.2.3 Development Trends

3. China BOPP Upstream and Downstream Industries

- 3.1 Upstream PP Industry
 - 3.1.1 Overview of PP
 - 3.1.2 Supply
 - 3.1.3 Import and Export
 - 3.1.4 Consumption
 - 3.1.5 Price
 - 3.1.6 Competition Pattern

3.2 Downstream Industry

- 3.2.1 Demand of Tobacco Industry for BOPP
- 3.2.2 Demand of Capacitor Industry for BOPP

4. Major Manufacturers

- 4.1 Zhejiang Great Southeast Packaging Co., Ltd.
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 BOPP Business
 - 4.1.4 Current Situation
 - 4.1.4.1 Expansion of BOPP and BOPET Projects
 - 4.1.4.2 Investment in High Temperature-resistance Ultra-thin Capacitor Film Project
 - 4.1.4.3 Deployment in Other High-tech Film Fields
- 4.2 Anhui Guofeng Plastic Industry Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 Operation
- 4.3 Foshan Plastics Group Co., Ltd.
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Current Situation
- 4.4 Jiangsu Zhongda New Material Group Co., Ltd.
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 BOPP Business
- 4.5 Hebei Baoshuo Co., Ltd.
 - 4.5.1 Profile
 - 4.5.2 Operation

- 4.6 Anhui Tongfeng Electronics Company Limited
 - 4.6.1 Profile
 - 4.6.2 Operation
- 4.7 Zhejiang Nanyang Technology Co., Ltd.
 - 4.7.1 Profile
 - 4.7.2 Operation
 - 4.7.3 Current Situation
 - 4.7.3.1 Development of Global Leading 2.8μm BOPP Electronic Film
 - 4.7.3.2 Deployment in Other High-tech Film Fields
- 4.8 Shanghai Zijiang Enterprise Group Co., Ltd.
 - 4.8.1 Profile
 - 4.8.2 Operation
- 4.9 Sichuan Dongfang Insulating Material Co., Ltd.
 - 4.9.1 Profile
 - 4.9.2 Operation
 - 4.9.3 BOPP Business

- Classification and Application of BOPP Thin Films
- BOPP Industry Chain
- China's BOPP Capacity and YoY Growth Rate, 2008-2011
- China's BOPP Capacity (by Province/City), 2009-2010
- BOPP Apparent Consumption and YoY Growth in China, 2004-2010
- Major BOPP Manufacturers and Their Market Shares, 2010
- BOPP Prices of Major Manufacturers in China, 2008-2011
- Capacity of BOPP Capacitor Film in China (by Province), 2009
- Major BOPP Capacitor Film Manufacturers and Their Market Shares in China, 2009
- Gross Margin of Some BOPP Capacitor Film Manufacturers, 2006-2009
- Classification and Application of BOPP Film for Cigarette Packing
- Major Manufacturers of BOPP Film for Cigarette Packing and Their Equipment & Capacity in China, 2009
- Development Tendency of BOPP Film for Cigarette Packing
- Output and YoY Growth of PP in China, 2000-2010
- China Propene Industry Consumption Structure, 2010
- PP Import & Export Volume and Import Dependency Rate in China, 2000-2010
- PP Consumption and YoY Growth in China, 2000-2010
- PP Consumption Structure in China, 2002-2010
- Propene Price in Global Market, 2009-2011
- Major PP Manufacturers and Their Market Shares in China, 2010
- PP Capacity in China (by Province/City), 2010
- Output and YoY Growth of Cigarette in China, 2004-2010
- Sales Volume and Sales-output Ratio of Cigarette in China, 2004-2010
- Output and Consumption of Capacitors in China (by Type), 2010
- Main Products and Their Market Shares in Chinese Capacitor Market, 2010
- Operating Income and Total Profit of Zhejiang Great Southeast Packaging, 2006-2010

- Operating Income of Zhejiang Great Southeast Packaging (by Product), 2008-2010
- Gross Margin of Zhejiang Great Southeast Packaging (by Product), 2008-2010
- Operating Income of Zhejiang Great Southeast Packaging (by Region), 2008-2010
- BOPP Operating Income, Operating Cost and Operating Profit of Zhejiang Great Southeast Packaging, 2008-2010
- Operating Income and Total Profit of Anhui Guofeng Plastic Industry, 2006-2010
- Operating Income of Anhui Guofeng Plastic Industry (by Product), 2008-2010
- Gross Margin of Anhui Guofeng Plastic Industry (by Product), 2008-2010
- Operating Income of Anhui Guofeng Plastic Industry (by Region), 2008-2010
- Operating Income and Total Profit of Foshan Plastics Group, 2006-2010
- Operating Income of Foshan Plastics Group (by Product), 2008-2010
- Gross Margin of Foshan Plastics Group (by Product), 2008-2010
- Operating Income of Foshan Plastics Group (by Region), 2008-2010
- Operating Income and Total Profit of Jiangsu Zhongda New Material Group, 2006-2010
- Operating Income of Jiangsu Zhongda New Material Group (by Product), 2008-2010
- Gross Margin of Jiangsu Zhongda New Material Group (by Product), 2008-2010
- BOPP Operating Income, Operating Cost and Operating Profit of Jiangsu Zhongda New Material Group, 2008-2010
- Operating Income and Total Profit of Hebei Baoshuo, 2006-2010
- Operating Income of Hebei Baoshuo (by Industry), 2008-2010
- Operating Income of Hebei Baoshuo (by Product), 2010
- Gross Margin of Hebei Baoshuo (by Industry), 2008-2010
- Gross Margin of Hebei Baoshuo (by Product), 2008-2010
- Operating Income of Hebei Baoshuo (by Region), 2010
- Operating Income and Total Profit of Anhui Tongfeng, 2006-2010
- Operating Income of Anhui Tongfeng Electronics (by Industry), 2008-2010
- Gross Margin of Anhui Tongfeng Electronics (by Product), 2008-2010

- Operating Income and Total Profit of Zhejiang Nanyang Technology, 2008-2010
- Operating Income of Zhejiang Nanyang Technology (by Product), 2008-2010
- Gross Margin of Zhejiang Nanyang Technology (by Product), 2008-2010
- Operating Income of Zhejiang Nanyang Technology (by Region), 2008-2010
- Operating Income and Total Profit of Shanghai Zijiang Enterprise Group, 2006-2010
- Operating Income of Shanghai Zijiang Enterprise Group (by Industry), 2008-2010
- Operating Income of Shanghai Zijiang Enterprise Group (by Product), 2008-2010
- Gross Margin of Shanghai Zijiang Enterprise Group (by Product), 2008-2010
- Operating Income and Total Profit of Sichuan Dongfang Insulating Material Co., Ltd, 2008-2010
- Gross Margin of Main Business of Sichuan Dongfang Insulating Material Co., Ltd, 2008-2010
- Operating Income of Sichuan Dongfang Insulating Material Co., Ltd (by Product), 2008-2010
- Gross Margin of Sichuan Dongfang Insulating Material Co., Ltd (by Product), 2008-2010
- Operating Income of Sichuan Dongfang Insulating Material Co., Ltd (by Region), 2008-2010
- BOPP Operating Income, Operating Profit and Gross Margin of Sichuan Dongfang Insulating Material Co., Ltd, 2008-2010

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