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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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; %)

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.
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.

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%.
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