



# Global and China Plastic Packaging Industry Report, 2010-2012

Jan. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and China Packaging Federation (CPF) etc.

## Abstract

In the global plastic packaging industry, the CAGR was roughly 7.2% between 2001 and 2010, featuring the fastest growth in packaging industry breakdown. For China, the market scale of plastic packaging industry approximated USD66.4 billion in 2011, accounting for 31.2% of the total worldwide. Currently, the growth in the output of plastic packaging is in proportion to the growth of demand, with the overall industry presenting a balanced supply-demand situation.

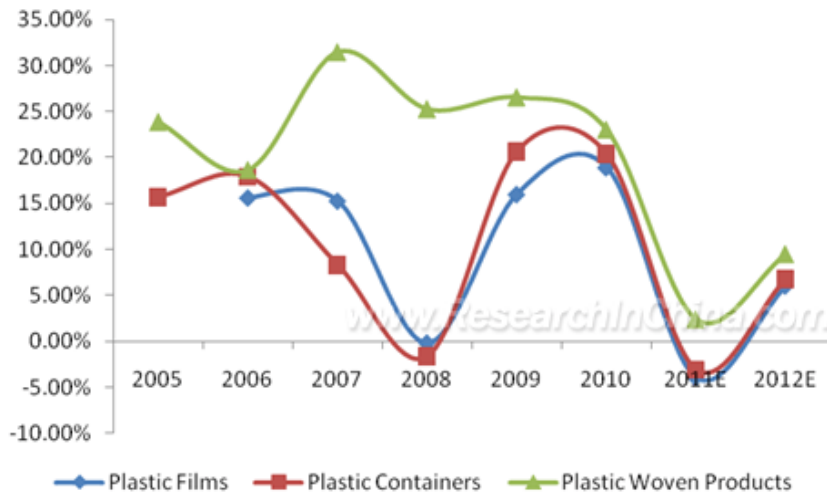
### Operating Features of China Plastic Packaging Industry

©**Low Industrial Concentration:** the top five businesses in plastic flexible packaging industry accounted for 19.4% market share in 2010. In particular, Huangshan Novel Co., Ltd. was the champion, with the market share making up 7.2%. And the top five businesses in cosmetic plastic packaging industry stood at 26% market share. In particular, Shenzhen Beautystar Company Limited occupied a lion's share of 8.6%.

©**Pharmaceutical Packaging Expecting to Become New Contributor for the Growth of Plastic Packaging Industry:** in terms of downstream sectors, plastic packaging witnesses the widest application in consumer goods industries like foods & drinks, daily chemical articles and pharmaceutical industries. In 2010, the application of plastic packaging in downstream foodstuff industry, daily chemical articles, pharmaceutical industry and others made up around 70%, 13%, 9%, and 8%, respectively. In developed countries, pharmaceutical packaging occupies 30% of the value of the medicines, while the figure in China is less than 10%. Hence, China pharmaceutical packaging industry is expected to see skyrocketing development in upcoming years.

©**Plastic Wire, Rope & Knitting Seeing Rapid Growth in Output:** among all the plastic packaging materials, the output of plastic film is the highest, while the output of plastic wire, rope and woven products among the subdivided products has seen the fastest growth. For example, the average output growth of plastic wire, rope and woven products in 2005-2010 reached 24.8%, compared with 13.1% and 13.5% for plastic film and plastic packaging container respectively.

## Growth in Output of Plastic Packaging by Product, 2005-2012



Source: WIND; ResearchInChina

### The report highlights:

- ✓ Current development, market size, competition pattern, supply and demand of global and China plastic packaging industry;
- ✓ Import & export, industry barrier, outlook and development trend of China plastic packaging industry;
- ✓ China plastic packaging upstream and downstream; focus on the status quo and demand of the three downstream sectors including food & drinks plastic packaging, pharmaceutical plastic packaging and cosmetic plastic packaging;
- ✓ Operation, project planning, prospect concerning five global plastic packaging giants and 14 Chinese plastic packaging giants;

It is noteworthy that plastic packaging downstream consumer goods enterprises are very optimistic about the long-and medium-term development of China's consumer goods market and have increased their investment in China. For instance, Unilever lavished over RMB12 billion to set up a base in Hefei; PepsiCo is set to invest additional USD2.5 billion in China and to set up 10-12 new plants. Overall, The continuous expansion of downstream consumer goods enterprises is bound to further fuel the demand for plastic packaging.

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