



Global and China Plastic Packaging Industry Report, 2013-2015

Sep. 2013

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.

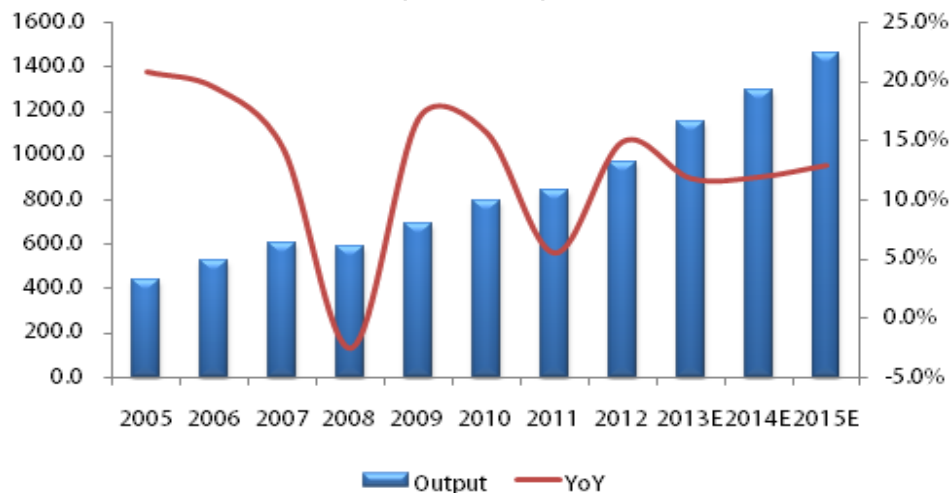
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Traditional plastic packaging markets are founded in the United States and Europe, however, market growth rates in Asia, Latin America and other regions over the years have significantly exceeded that in European and American area. Emerging markets will soon replace the U.S. and European markets to be the main force for plastic packaging products.

Output and YoY Growth Rate of Plastic Film in China, 2005-2015
(Unit: 10kt)



Source: National Bureau of Statistics of China;

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In recent years, China has seen rapid development in packaging market size, which has made it the world's second largest packaging market, but the plastic packaging industry concentration is not high. For example, there are more than 18,000 flexible plastic packaging manufacturers, but mostly with small scale, confronted with product homogeneity, excess capacity, lack of competitiveness and other problems. For now, the top five companies involving HuangShan NOVEL Co., Ltd, Shanghai Zijiang Color Printing & Packing Co., Ltd and VPS Propack Beijing Co., Ltd. accounted for a total market share of less than 15%.

Around the global and China plastic packaging industries, this report makes an analysis on market competition based on the prediction of market size and future trends, but also focusing on major companies at home and abroad.

As one of China's major plastic packaging enterprises, HuangShan NOVEL Co.,Ltd, (002014) is mainly occupied in the production and operation of plastic composite color printing flexible packaging materials, pharmaceutical packaging materials, vacuum aluminised plastic films, multifunctional high-barrier films, etc., of which, composite color printing packaging sales occupied 92.2% of the total revenue. In 2012, influenced by the weak downstream demand and other factors, revenue from composite color printing packaging materials was basically flat with that in 2011.

Being one of the top packing companies in the world, Amcor's revenue harvested AUD6.08 billion in 2012, down 3.7% from a year earlier. It holds a leading position in food, pharmaceuticals, cosmetics, tobacco packaging and other fields, with seven production bases in China, located in Huizhou (Guangdong), Zhongshan (Guangdong), Foshan (Guangdong), Jiangyin (Jiangsu), Chengdu (Sichuan) and Beijing.

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