



China Packaging Machinery Industry Report, 2014-2017

Sep. 2014

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.

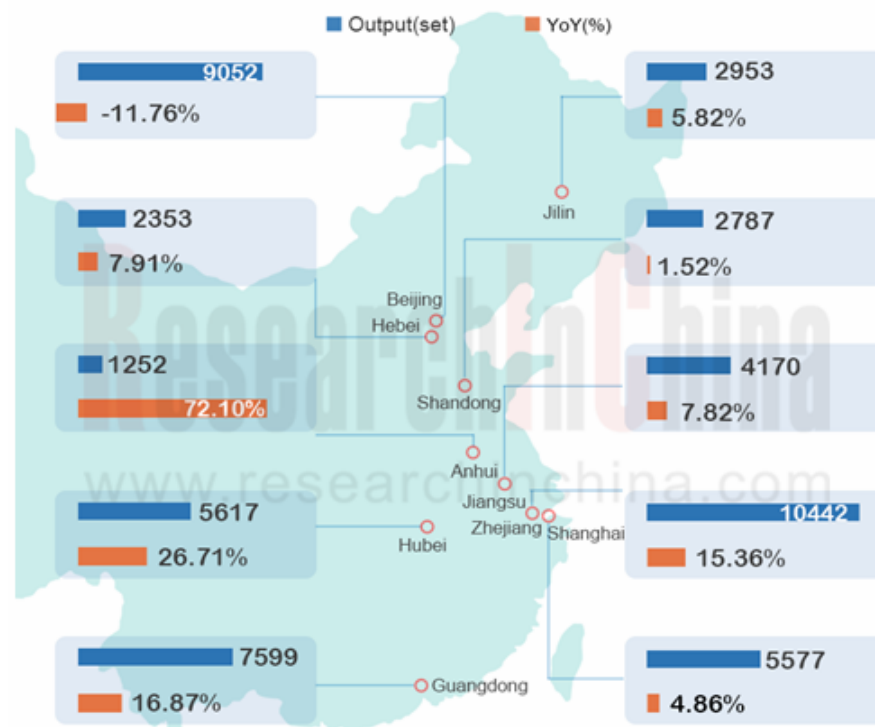
Abstract

In 2013, China manufactured 109,800 sets of packaging equipment, up 13.46% year on year, generating total revenue of RMB27.095 billion, a jump of 7.75% from a year earlier. The industry's total revenue presented a CAGR of 16.38% during 2007-2013. The development of industries like food packaging, pharmaceutical packing and household chemicals packaging will conduce to strong growth momentum of packaging machinery industry.

In 2013, sales of RMB1.988 billion were achieved in the Chinese packaging machinery automation market, of which low-voltage motor, low-voltage converter and servo were top three best-selling products, separately accounting for 25.8%, 21.2% and 19.1% of packaging machinery automation market. Servo, as an important component for automatic packaging machinery, has significant pulling effect on packaging machinery automation market and will usher in a stage of rapid development in the future.

Affected by a combination of multiple factors, such as capital, technology, talent and experience, most of domestic packaging equipment manufacturers in China operate in small scale, resulting in a low market concentration. However, the industry is becoming increasingly concentrated, with five large companies holding a combined 10.38% market share in 2013, up 1.25 percentage points against 2012 and expected to further improve in the future.

Output and Growth Rate of Main Packaging Equipment Regions in China, H1 2014



Source: China Packaging Machinery Industry Report, 2014-2017, by ResearchInChina

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As the first listed company in China beverage packaging machinery industry, Guangzhou Tech-Long Packaging Machinery Co., Ltd. (Tech-Long) has a 140,000 m² beverage packaging machinery plant, and it has been the largest beverage packaging equipment manufacturing base in Asia. In 2013, Tech-Long manufactured 415 sets of liquid packaging machinery, soaring by 221.7% from the previous year, and sold 422 sets, rising by 34.39% on a year-on-year basis.

J.S. Corrugating Machinery Co., Ltd (J.S. Machine) is the first listed paper product packaging machinery manufacturer in China, the largest base for R&D, manufacture and export of paper product packaging machinery in the country, and the world's largest producer of corrugated mechanical equipment and follow-up processing equipment. In 2013, the company earned revenue of RMB470 million from packaging machinery, a 48.62% rise from the prior year, making up 1.73% of the market, up 0.47 percentage points from the year before.

China Packaging Machinery Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- Overview of machinery industry, covering definition, classification, industry characteristics, industry policies, etc.;
- Overview of Chinese packaging machinery market, including output, total revenue, gross margin, market competitive landscape, etc.;
- Downstream application of packaging machinery in China, involving food & beverage packaging market, pharmaceutical packaging market, etc.;
- Import and export of packaging machinery in China, including import & export volume and value, major countries;
- Key Chinese packaging machinery companies, containing operation, output and sales volume, major customers and new products.

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