



**China Aluminum Plastic Film Industry  
Report, 2014-2017**

**Feb. 2015**

## 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

Aluminum plastic film is a packaging material of polymer li-ion battery (also known as soft-package lithium-ion battery). It is one of the most technically complicated taches in the field of battery materials.

In recent years, China's soft-package lithium-ion battery market has expanded rapidly. During 2009-2013, there were up to 131 new entrants in Chinese soft-package lithium battery industry. In 2013, the market size of soft-package lithium battery in China totaled RMB10.83 billion, up 27% from a year earlier. It is projected that in 2014 this figure will climb to about RMB14 billion.

Benefiting from the rapid growth of soft-package lithium-ion battery market, the demand for aluminum plastic film in China keeps expanding year by year, with aluminum plastic film accounting for around 15% of costs of soft-package lithium battery. In 2013, the demand for aluminum plastic film in China reached 36.5 million square meters and the market size hit RMB1.5 billion, occupying 13.9% of soft-package lithium battery market size. It is estimated that in 2014 the aluminum plastic film demand in China might amount to 45.81 million square meters and the market size would hit RMB1.95 billion.

Aluminum Plastic Film Related Companies in China, 2014

LOGO	Headquarters	Profile
	Tokyo, Japan	The world's largest aluminum-plastic film producer, dominating China's aluminum-plastic film industry with 90% market share together with Showa Denko.
	Tokyo, Japan	The world's second largest aluminum-plastic film producer, occupying roughly 90% market share of aluminum-plastic film industry in China with DNP; in 2014 its aluminum-plastic film capacity was expanded to three times than that of 2010.
	Seoul, South Korea	A major aluminum-plastic film production enterprise in South Korea, with products passing the test of Dongfang Electric Corporation and Rainbow Group, thus occupying a certain market share in China
	Tokyo, Japan	The subsidiary T & T Enerotechno Co., Ltd. is engaged in the lithium-ion battery packaging material sales consisting of flexible packaging materials and rigid packaging materials, occupying a certain market share in China.
	Shanghai, China	A leader in China's aluminum-plastic film industry, with products mainly used in mobile phones and laptop computers (still in the test in electric vehicles). The monthly supply of 80,000-100,000 square meters makes it possible to replace imported products to occupy a larger market share in China in the future.
	Foshan, Guangdong	The subsidiary Foshan Yishida Capacitor Materials Co., Ltd. specializes in the production of lithium battery aluminum-plastic film but with low output.
	Lianyungang, Jiangsu	China's earliest aluminum-plastic film production enterprises, applied for lithium battery flexible packaging film patent in 2001, no big movements in aluminum-plastic film over recent two years.
	Yongkang, Zhejiang	Started the 5-million-square-meter Lithium Battery Packaging Film Project in 2013; in Nov 2014, the project's capacity was adjusted to 15 million square meters. The aluminum-plastic film samples have been produced and inspected, not yet put into production.

Source: China Aluminum Plastic Film Industry Report, 2014-2017 by ResearchInChina

Like the global competitive landscape, China's aluminum plastic film market has been dominated by the Japanese and south Korean companies, including DNP, Showa Denko, Toppan Printing, and Youl Chon Chemical. Driven by the factors like rapid growth of market demand and technological progress, a few companies including Zijiang Enterprise, FSPG, Zhongjin Matai, Heze Tianxin, as well as Daoming Optics began to set foot in aluminum plastic film industry, among which Zijiang Enterprise, FSPG, Zhongjin Matai, and Heze Tianxin have achieved mass production. In future, China's aluminum plastic film industry is expected to embrace growth in both demand expansion and import substitution.

The aluminum plastic film of Zijiang New Material, a subsidiary of Zijiang Enterprise, has obtained the certification from large lithium battery manufacturers such as ATL, Coslight Group, and Lishen Battery. Meanwhile, the company began to supply products to ATL in small patch, with the current monthly supply of 80,000-100,000 square meters.

FSPG's aluminum-plastic film project started the approval procedure in 2008, and the product structure design was completed in 2008-2011 and the construction of the plant and supporting facilities was finished in 2011-2012. In mid-2012, it began trial production and invited the customer to mass trial-evaluation. In 2013, the company started small-batch sales. At present, the company has delivered aluminum plastic film products to more than 100 customers, and most of the battery plants are conducting battery packaging in batch.

In 2013, Daoming Optics & Chemical began to venture into aluminum plastic film industry by constructing a 5-million-m<sup>2</sup> lithium battery packaging film production line. In November 2014, the company announced a non-public offering plan, under which its capacity would be expanded to 15 million square meters through fundraising. At present, Daoming Optics has produced the samples of aluminum plastic film and has delivered them to customers for testing. But they have not achieved mass production.

China Aluminum Plastic Film Industry Report, 2014-2017 mainly focuses on the following:

- Current situation, competition pattern, and development trend, etc. of China's aluminum plastic film industry;
- Influences of downstream sectors on the development of aluminum plastic film industry;
- Operation, revenue structure, gross margin, and aluminum plastic film business of 4 foreign companies and 4 Chinese enterprises;
- Development forecast of China's aluminum plastic film industry and operation of major enterprises.

### 1 Overview

- 1.1 Definition
- 1.2 Production Methods
- 1.3 Characteristics

### 2 Development of Aluminum Plastic Film Industry in China

- 2.1 Global Development
- 2.2 Development in China
- 2.3 Competitive Landscape
- 2.4 Development Trend
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  - 2.4.2 Growth in Demand for Soft-package Lithium Battery Propels the Development of Aluminum Plastic Film
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- 5.3 Jiangsu Zhongjin Matai Medicinal Packaging Co., Ltd.
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- 5.4 Daoming Optics & Chemicals Co. Ltd.
- 5.5 Heze Tianxin New Material Technology Co., Ltd.
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### 6 Prediction and Anticipation

- 6.1 Development of China's Aluminum Plastic Film Industry
- 6.2 Operation of Key Enterprises
  - 6.2.1 Revenue
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  - 6.2.3 Gross Margin
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- Shipments of Global Lithium Batteries for Notebook PCs, Tablet PCs, and Mobile Phones, 2012-2017E
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- Zijiang New Material's Specification Parameter for ZJA88B-type Aluminum Plastic Film
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