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# World Packaging Machinery

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Industry Study with Forecasts to **2010 & 2015**

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*A growing need for shippers worldwide to accurately track items for safety and security reasons, as well as to minimize counterfeiting, will help drive gains in world packaging machinery demand through 2010.*

## World demand to rise 4.9% annually through 2010

Global demand for packaging machinery is projected to expand 4.9 percent per year through 2010 to over \$33 billion, accelerating from the 2000-2005 period. Developing parts of the world will provide suppliers with some of the best sales opportunities going forward, most notably in Asia and Eastern Europe. China will record the largest gains of any country and become the second largest market in the world behind the US. Sales are also expected to be strong in India, Russia, Mexico and South Korea, as well as in lower-volume markets such as Indonesia, Malaysia, Thailand and Turkey. Although the rate of growth will be less robust than in developing areas, packaging equipment demand in the US and Japan will show renewed strength following a period of relatively sluggish gains, and market advances in Western Europe will also accelerate through 2010.

## Labeling, coding equipment to grow the fastest

Labeling and coding equipment is expected to register the strongest gains of any major product category through 2010, stimulated by rising consumption of label-intensive nondurable goods and by mandated use of radio frequency identification (RFID) tags by suppliers to large buyers like the US Department of Defense and Wal-Mart. A growing need for shippers to accurately track items for safety and security reasons, as well as to help combat counterfeiting, will also



contribute to market increases. Demand for filling and form/fill/seal machinery, the most widely used type of packaging equipment, will also expand at an above-average pace. New generations of machinery with improved efficiency and flexibility are boosting replacement demand, as well as the number of applications for this equipment.

## Drug, personal care products offer best prospects

Pharmaceutical and personal care products will represent the fastest growing market for packaging machinery through 2010. Sales will be driven by increased spending for pharmaceuticals in many developing nations, by the growing use

of disposable medical devices, and by an aging of the population in developed countries. Personal care product manufacturers' continuing efforts to improve efficiency will contribute to gains. However, the food industry will remain by far the largest single market for packaging equipment, accounting for more than two-fifths of all product demand in 2010. Suppliers will benefit from rising personal incomes in the developing world, which are enabling consumers to buy a widening array of packaged foods, and from increased consumption of prepared, ready-to-eat foods in developed nations. Ongoing efforts to increase food processing efficiency, lengthen shelf life and reduce spoilage will also help bolster demand for food packaging equipment.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### South Korea: Supply & Demand

South Korea has emerged as a major producer of packaging machinery over the past decade, with industry output growing 13 percent annually from 1995 to 2005, when shipments reached 1.5 million. Most of the machinery made is sold locally, but exports have grown. Nevertheless, South Korea remains a net importer of packaging equipment, with a trade deficit equating to \$1.2 billion in 2005. Major foreign sources of supply include Italy, Japan and the US.

The market for packaging machinery in South Korea is expected to expand 5.6 percent annually through 2010 to \$1.2 billion, up from the 2000-2005 and lagging the region as a whole. This represents healthy growth. Equipment suppliers are seeing a pickup in industrial fixed investment activity in a recovering economic climate. For instance, in April 2006 R&D spending at Onsan, with work expected to be completed by 2008, is expected to be completed by 2008.

Market gains through 2010 will be dampened by a slowdown in manufacturing sector growth, with a large amount of refurbished packaging machinery also acting as a constraint.

Equipment from plants in South Korea are expected to reach \$1.2 billion per year through 2010 to \$860 million, approximating increases in domestic demand. Advances will be spurred by healthy sales conditions locally and many export markets. However, strong competition from foreign suppliers in both domestic and overseas markets will tend to limit industry production gains, and South Korea's trade deficit in packaging machinery will widen through 2010.

Packaging equipment manufacturers headquartered in South Korea include Dawoo Precision Machinery, Hanshin Labelling Machine, and others.

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**TABLE VI-7**  
**SOUTH KOREA**  
**KEY INDICATORS FOR PACKAGING MACHINERY DEMAND**

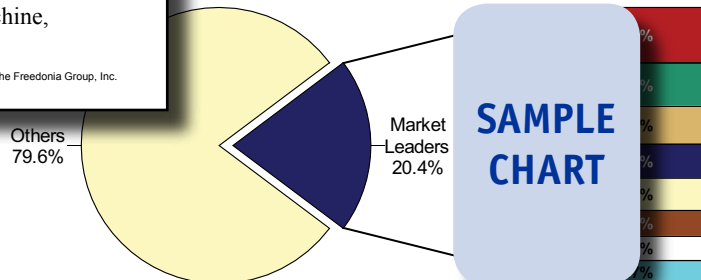
Item	1995	2000	2005	2010	2015
Population (million persons)	45.1				
per capita GDP	13530				
Gross Domestic Product (bil 2000\$)	610				
% fixed investment	38.9				
Gross Fixed Investment (bil 2000\$)	237.0				
\$ machinery/capita	8.0				
\$ machinery/mil \$ GDP	590				
\$ machinery/mil \$ GFI	1519				
Mfg Value Added (bil 2000\$)	162				
\$ machinery/000\$ MVA	2.22				
Packaging Machinery Demand (mil \$)	360				
% South Korea	5.5				
Asia/Pacific Pkg Mach Dmd (mil \$)	6580				

**SAMPLE  
TABLE**

**SAMPLE  
TEXT**

**CHART VIII-1**

**WORLD PACKAGING MACHINERY  
MARKET SHARE BY COMPANY, 2005  
(\$26.2 billion)**



**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Guangdong Light Industrial Machinery Plant 2 Limited

Xi Shan Guo Jing Across  
 Guangshan Road, Chaoyang District  
 Shantou, Guangdong 515100  
 China  
 86-75-4322-2347  
 http://www.glr

Annual Sales: any, 10/06)  
 Employment: 06)

Key Products: nes and individual ma-  
 chines

**SAMPLE  
PROFILE**

Guangdong Light Industrial Machinery Plant 2 is a privately held manufacturer of beer/beverage bottle filling lines, as well as individual machines. In August 2006, KHS AG (Germany), a subsidiary of Kloeckner-Werke AG (Germany), signed an agreement to acquire a 70 percent interest in Guangdong Light Industrial Machinery Plant 2, with the remaining 30 percent to be held by two managing owners. The transaction is expected to be completed following governmental approval.

The Company's beer/beverage bottle filling lines are produced in models with capacities ranging from 12,000 to 40,000 bottles per hour. Guangdong Light Industrial Machinery Plant 2 reports that its 40,000-bottles-per-hour beer/beverage bottle filling line is the largest capacity beer/beverage bottle filling line in China. Examples of the individual machines made by the Company are unloading, palletizing and capping types.

**TABLE VI-8**  
**SOUTH KOREA**  
**PACKAGING MACHINERY SUPPLY & DEMAND**  
 (million dollars)

Item	1995	2000	2005	2010	2015
Mfg Value Added (bil 2000\$)	162				
\$ machinery/000\$ MVA	2.22				
Packaging Machinery Demand	360				
By Type:					
Filling & Form/Fill/Seal	82				
Labeling & Coding	46				
Wrapping, Bundling & Palletizing	47				
Case Forming, Packing & Sealing	25				
Other Machinery	95				
Parts	65				
By Market:					
Food	168				
Beverages	65				
Pharmaceuticals/Personal Care	19				
Chemical Products	33				
Other	75				
net exports	-170				
Packaging Machinery Shipments	190				

**SAMPLE  
TABLE**

"Demand for packaging machinery in South Korea totaled \$770 million in 2005, the third largest market in the Asia/Pacific region behind Japan and China. Sales grew at a robust 9.5 percent annual pace between 2000 and 2005, stimulated by ..."

--Section VI, pg. 159





**OTHER STUDIES**

**Packaging Machinery in China**

China is one of the fastest growing packaging machinery markets in the world. This study presents historical demand data (1996, 2001, 2006) and forecasts to 2011 and 2016 by product (e.g., filling and form/fill/seal machinery, bundling and palletizing machinery); by market (e.g., food, beverages, medical, pharmaceutical, personal care products); and by region (e.g., Central-North, Central-East). The study also considers market environment factors, evaluates company market share and profile leading suppliers.

#2257 ..... 01/2008..... \$4900

**Gears**

US demand for gears will grow 3.3% annually through 2011. The best prospects will come from the aerospace industry, which will post the fastest advances. Due to the dominant size of the motor vehicle market, vehicular gear assemblies will remain the largest segment, with individual types such as helical and bevel gears leading gains. This study analyzes the \$24.9 billion US gear industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major players.

#2273 ..... 11/2007..... \$4400

**World Elevators**

World elevator and escalator demand will rise 5.1% yearly through 2011. Gains will be driven by the ongoing migration to cities in developing regions, and by mandated retrofit services and nonresidential construction in developed markets. Escalators and moving walkways will outpace elevators. This study analyzes the \$44.5 billion world elevator and escalator industry, with forecasts for 2011 and 2016 by type, market, world region and for 15 countries. It also details market share and profiles major players.

#2248 ..... 09/2007..... \$5500

**Bearings**

Ball, roller and plain bearing demand in the US will reach \$10.4 billion in 2011. Growth will be driven by largely favorable market conditions and by a shift toward more expensive, better performing products. Unmounted plain bearings will grow the fastest while aerospace, automotive and engine/turbine manufacturing will lead gains by market. This study analyzes the US bearing industry, with forecasts for 2011 and 2016 presented by product and market. It also details company market share and profiles major players.

#2207 ..... 07/2007..... \$4500

**World Commercial Refrigeration Equipment**

World commercial refrigeration equipment demand will rise 4.8% yearly through 2010. Developing Asian countries will outpace the global average, led by China and India. Prospects are also favorable in Eastern Europe. Reach-in and walk-in coolers and freezers will be the fastest growing types. This study analyzes the \$21.3 billion world commercial refrigeration equipment industry for 2010 and 2015 by product, world region and for 27 countries. It also evaluates market share and profiles major players.

#2141 ..... 01/2007..... \$5400

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