

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form & Corporate
Use License 7](#)

[About Freedonia,
Custom Research,
Related Studies, 8](#)



Packaging Machinery in China

Industry Study with Forecasts for **2016 & 2021**

Study #2918 | July 2012 | \$5400 | 204 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Economic Overview.....	4
Recent Economic Performance.....	5
Economic Outlook.....	7
Demographic Overview	11
Population.....	12
Urbanization.....	14
Households.....	15
Personal Income Trends.....	16
Gross Fixed Capital Formation Outlook.....	19
Industrialization & Manufacturing Trends.....	21
Packaging Material Outlook.....	28
Technology Trends.....	31
Legal & Regulatory Environment.....	33
The Twelfth Five-Year Plan.....	35

OVERVIEW

Supply & Demand.....	39
Pricing Trends.....	41
International Environment.....	43
World Outlook	44
Foreign Trade	45

PRODUCTS

General	48
Filling & Form/Fill/Seal Machinery	51
Liquid Filling	53
Form/Fill/Seal.....	54
Dry Filling	55
Labeling & Coding Machinery	56
Labeling.....	58
Coding, Dating, & Marking	59
Wrapping, Bundling, & Palletizing Machinery...60	
Wrapping & Bundling	62
Palletizing.....	64
Other Packaging Machinery.....	64
Cartoning.....	66
Case Forming, Packing, & Sealing.....	67
All Other	68
Packaging Machinery Parts.....	69

MARKETS

General	71
Food	74

Fruits & Vegetables	76
Bakery & Confectionery	77
Meat Products	78
Other Food Products.....	78
Beverages	79
Beer & Alcohol.....	81
Milk.....	82
Carbonated Beverages	83
Water.....	84
Fruit Beverages	85
Tea & Coffee	86
Other Beverages	87
Medical, Pharmaceutical, & Personal Care Products.....	87
Medical & Pharmaceutical Products.....	89
Personal Care Products.....	90
Chemical Products	91
Detergents & Cleaners	93
Agricultural Chemicals	94
Paints & Coatings	95
Other Chemical Products	95
Other Markets.....	96
Electrical & Electronic Equipment.....	98
Tobacco Products.....	98
Textiles & Apparel.....	99
All Other	100

REGIONAL TRENDS

General	102
Regional Demographic & Economic Trends.....	104
Population Patterns	105
Economic Outlook.....	107
Regional Manufacturing Activity.....	108
Regional Packaging Machinery Demand.....	110
Central-North.....	113
Overview.....	113
Packaging Machinery Demand.....	115
Northeast	117
Overview.....	117
Packaging Machinery Demand.....	119
Central-East.....	121
Overview.....	121
Packaging Machinery Demand.....	123
Central-South.....	125
Overview.....	125
Packaging Machinery Demand.....	127
Southwest	129
Overview.....	129
Packaging Machinery Demand.....	131
Northwest	133
Overview.....	133
Packaging Machinery Demand.....	135

INDUSTRY STRUCTURE

General	138
Industry Composition	139
Market Share	142
Product Development & Manufacturing	145
Marketing & Distribution	146
Cooperative Agreements.....	148
Foreign Participation in China.....	150
Legal & Regulatory Issues	151
Joint Ventures.....	153
Wholly Owned Foreign Enterprises	155
Representative Offices	156

COMPANY PROFILES

Avery Dennison	158
Beijing Omori Changkong Packing Machinery ..	159
Bosch (Robert) GmbH	161
Coesia SpA.....	163
Guangzhou Tech-Long Packing Machinery.....	165
Hanguang Machinery Plant	167
Hangzhou Youngsun Intelligent Equipment ...	168
Hangzhou Zhongya Machinery	169
Harbin Saide Hi-Tech	170
Hualian Machinery Group.....	171
Hunan China Sun Pharmaceutical Machinery ..	172
Jiangsu Tengtong Packing Machinery.....	173
JS Corrugating Machinery.....	174
Krones AG.....	176
MeadWestvaco Corporation	178
Mettler-Toledo International	179
Nanjing Light Industrial Machinery	181
Reynolds Group.....	182
Salzgitter AG.....	184
Sato Corporation.....	186
Shanghai BOZN Packing Machinery.....	187
Shanghai Saidone Technologies.....	188
Shanghai Tobacco Machinery	189
Shantou Jinxin Machinery	190
Shenyang Baihualin Light Industry Food Machinery.....	191
Tetra Laval International.....	192
Tianjin Huayi.....	196
Truking Technology	197
Wuxi Changjiang Machinery	198
Xutian Packing Machine	199
Yanbian Longchuan Packaging Machinery	200
Zhejiang Hualian Pharmaceutical Machinery ..	201
Other Companies Mentioned in Study	203

List of Tables

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 Gross Domestic Product of China . 11
2 Population of China 13
3 Households in China by Region... 16
4 Consumer Income & Expenditures in China..... 19
5 Gross Fixed Capital Formation in China 21
6 Manufacturing Value Added in China..... 24
7 Packaging Demand in China 31

OVERVIEW

1 Packaging Machinery Supply & Demand in China 41
2 Pricing Patterns for Packaging Machinery in China 42
3 Chinese Foreign Trade in Packaging Machinery 47

PRODUCTS

1 Packaging Machinery Supply & Demand in China by Product.... 50
2 Filling & Form/Fill/Seal Machinery Supply & Demand in China 53
3 Labeling & Coding Machinery Supply & Demand in China 58
4 Wrapping, Bundling, & Palletizing Machinery Supply & Demand in China 62
5 Other Packaging Machinery Supply & Demand in China 66
6 Packaging Machinery Parts Supply & Demand in China 70

MARKETS

1 Packaging Machinery Demand in China by Market..... 73
2 Food Market for Packaging Machinery in China 76
3 Beverage Market for Packaging Machinery in China 81
4 Medical, Pharmaceutical, & Personal Care Product Market for Packaging Machinery in China.. 89
5 Chemical Products Market for Packaging Machinery in China.. 93
6 Other Markets for Packaging Machinery in China 97

REGIONAL TRENDS

1 Population of China by Region...106
2 Gross Domestic Product of China by Region.....108
3 Manufacturing Value Added in China by Region.....109
4 Packaging Machinery Demand in China by Region.....112
5 Central-North Region of China: Packaging Machinery Demand .117
6 Northeast Region of China: Packaging Machinery Demand .121
7 Central-East Region of China: Packaging Machinery Demand .125
8 Central-South Region of China: Packaging Machinery Demand .129
9 Southwest Region of China: Packaging Machinery Demand .133
10 Northwest Region of China: Packaging Machinery Demand .137

INDUSTRY STRUCTURE

1 Revenue Data: Selected Packaging Machinery Sales by Company, 2011.....141
2 Selected Cooperative Agreements150

List of Charts

MARKET ENVIRONMENT

1 Population of China by Age, 2001-2021..... 14
2 Manufacturing Value Added in China by Product, 2011 25

OVERVIEW

1 Pricing Trends for Packaging Machinery in China, 2001-2021 43

PRODUCTS

1 Packaging Machinery Demand in China by Product, 2011 51

MARKETS

1 Packaging Machinery Demand in China by Market, 2011 74

REGIONAL TRENDS

1 Packaging Machinery Demand in China by Region, 2011.....113
2 Central-North Region of China ...115
3 Northeast Region of China119
4 Central-East Region of China123
5 Central-South Region of China...127
6 Southwest Region of China131
7 Northwest Region of China.....135

INDUSTRY STRUCTURE

1 Packaging Machinery Market Share in China by Company, 2011142

Gains will be led by manufacturing output as consumption of Chinese goods grows, and the development of e-commerce will allow producers' efforts to distribute to more areas in China.

Demand to increase 7.5% per annum through 2016

Demand for packaging machinery in China is forecast to rise 7.5 percent per annum to ¥40 billion in 2016. Advances will be led by growth in manufacturing output as consumption of Chinese goods grows both internationally and domestically. The development of e-commerce in China and producers' efforts to expand distribution to more areas in China will lead to the greater consumption of packaging, resulting in growth of associated packaging machinery sales. In addition, the intensity of packaging use in China will continue to rise for both functional and aesthetic reasons, further driving demand for packaging machinery. More stringent safety and hygiene standards for food, beverage, and medical products will drive demand for more advanced packaging equipment. However, government efforts to conserve resources by reducing packaging material and restrictions related to over-packaging will limit growth through 2016.

Filling, form/fill/seal equipment largest type

Filling and form/fill/seal equipment will continue to be the largest product segment in value terms in 2016. Suppliers will benefit from increasing consumption of packaged food and beverages in China as lifestyles continue to change in line with rising personal income levels. Demand for these types of machinery will also grow due to the development of the pharmaceutical industry and improved medical technology. Demand for labeling and coding equipment is ex-

Packaging Machinery Demand in China (40 billion yuan, 2016)



Filling & Form/Fill/Seal
30%

Labeling & Coding
17%

Wrapping/Bundling/
Palletizing 15%

Other Machinery
27%

Parts
11%

pected to record the strongest advances of any packaging machinery product. Gains will be aided by stricter product labeling requirements in the food and beverage industries in China.

Trends in food and beverage markets have the largest effect on overall packaging machinery sales. Gains are fore-cast to advance faster than the industry average through 2016. Improving income levels and urban lifestyle trends will continue to stimulate growth. Demand for machinery used to package medical, pharmaceutical, and personal care products is expected to expand at the fastest rate through 2016, due to an aging population and growing demand for pharmaceutical products, as personal income levels rise and access to healthcare grows.

Central-East region to remain market leader

Packaging machinery demand among the regions in China varies, mainly due to differing manufacturing activity. Sales in the Central-East will allow the region to remain the largest single market for packaging machinery through 2016. Regional advances will be driven by rapid growth in manufacturing output, a result of a well established economic base, developed transportation infrastructure, large industrial investment, and favorable government policies. Demand for packaging machinery in the Northeast is expected to post the fastest growth of any region through 2016, with gains primarily stimulated by the government's Northeast Revitalization policy.

Copyright 2012 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

MARKETS

Food

Food-related packaging machinery was the largest market for packaging machinery over the 2001-2011 period, with growing the overall market. Gains were driven by strong growth in income levels, particularly in more affluent urbanized areas in provinces, making processed foods more affordable. More changes along with urbanization during this period also contributed to the large level of demand for packaged food. More people are eating fast food and convenience and snack foods, which tend to have a high packaging to product ratio, thus contributing to packaging machinery demand.

Demand for food packaging machinery is expected to grow 10 percent per year through 2016, slightly above the overall market. Demand will be stimulated by further improvements in income levels rise, especially in the less developed areas. However, an increasing urban population will require more machinery to reduce spoilage during transport and shipment, leading to additional sales opportunities. In addition, the country's total food is currently only 60 percent processed (compared to 90 percent or more of the food in the US and other industrialized nations), suggesting that a large potential remains in China for food packaging equipment suppliers.

However, growth will be constrained to some extent by competition among equipment manufacturers as new suppliers enter the market and import prices fall. In addition, government efforts to conserve resources by reducing packaging material use will be going forward. In 2009, the General Administration of Quality Supervision, Inspection and Quarantine of the People's Republic of China issued the Restriction of Over Packaging – Food and Cosmetics.

74

Copyright 2012

TABLE IV-2

FILLING & FORM/FILL/SEAL MACHINERY SUPPLY & DEMAND IN CHINA (million yuan)

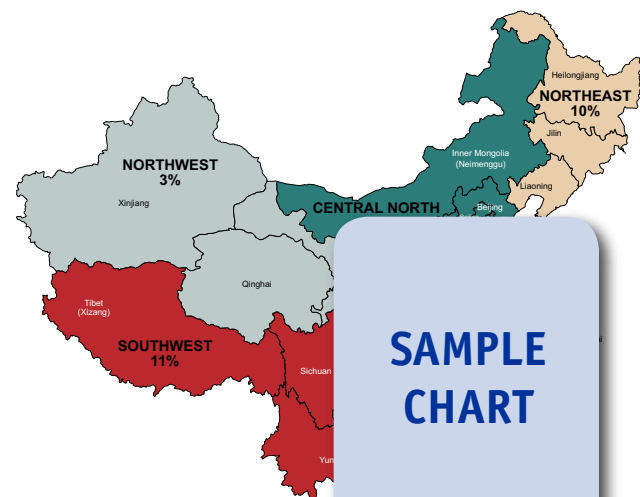
Item	2001	2006	2011	2016	2021
Packaging Demand (bil ¥)					
¥ machinery/000¥ packaging					
Filling & FFS Machinery Demand					
Liquid Filling					
Form/Fill/Seal					
Dry Filling					
- net imports					
Filling & FFS Machinery Shipments					
% filling & FFS					
Total Packaging Machinery Shipments	3170	9350	19700	30000	44000

SAMPLE TABLE

SAMPLE TEXT

CHART VI-1

PACKAGING MACHINERY DEMAND IN CHINA BY REGION (27.8 billion yuan, 2011)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-5
CENTRAL-NORTH REGION OF CHINA:
PACKAGING MACHINERY DEMAND
 (million yuan)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil ¥)					
% MVA					
Manufacturing Value Added (bil ¥)					
¥ packaging machinery/000¥ MVA					
Packaging Machinery Demand					
Food					
Beverages					
Medical/Pharm/Personal Care Prdts					
Chemical Products					
Other					
% Central-North					
Total Packaging Machinery Demand	6770	13500	27800	40000	55000



COMPANY PROFILES

JS Corrugating Machinery Company Limited

No. 22, Jiangxing Road
 Jiangnan Economic Development Zone
 Wuhan
 China
 86-27-83...
 http://w...

Sales: ¥...
 Employe...

Key Pro... and case forming
 and other...



JS Corrugating Machinery is a producer of equipment used in the fabrication of corrugated materials and packaging. The Company serves customers in the Asia/Pacific region, North and Latin America, Europe, and the Africa/Mideast region.

The Company participates in the Chinese packaging machinery industry through the production of corrugators and related equipment, and case forming and other converting equipment. Corrugators, which are available in wet and dry end models, are used to produce corrugated materials intended for making corrugated boxes and other packaging. Wet end models comprise mill roll stand, preheater and preconditioner, glue, single-facer, and double-facer machines. JS Corrugating Machinery's dry end models include slitter scorer, rotary shear, cut-off, and stacker machines. In 2011, the Company introduced the FYJ-C slitter scorer machine, which enables up to three scoring profiles. Among the Company's related corrugating equipment are armstitcher, automatic spacer, thin-blade slitter scorer, creasing, and creasing and cutting machines.

"Food applications will continue to dominate the packaging machinery market in the Central-North region, and the market share will climb to 36 percent in this region in 2016. Advances will be driven by expanding agricultural output and food processing, especially for products such as corn, wheat, and meat. The beverage market will also post rapid growth, reflecting a rising demand for bottled drinks and milk products through 2016, due to ..."
 --Section VI, pg. 116

ORDER INFORMATION

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

[Click here to learn more about the Corporate Use License](#)

ORDER FORM

F-WEB.-2918

Packaging Machinery in China..... \$5400

Corporate Use License (add to study price) * + \$2600
___ Additional Print Copies @ \$600 each *
Total (including selected option) \$_____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card #

MM YY

Expiration Date

Signature _____

Name _____

Title _____

Company _____

Division _____

Street _____
(No PO Box please)

City/State/Zip _____

Country _____

Phone _____ Fax _____

Email _____

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature _____

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature _____

OTHER STUDIES

World Food Processing Machinery

Global sales of food processing machinery are expected to climb 7.3 percent per year to \$53.3 billion in 2016. The Asia/Pacific region will record the fastest demand gains, led by China, India, Indonesia and Thailand. Bakery and pasta machinery will remain the largest segment and post the highest value gains. This study analyzes the \$37.4 billion world food processing machinery industry, with forecasts for 2016 and 2021 by type, world region and for 21 major countries. The study also evaluates company market share and profiles industry participants.

#2931 November 2012 \$5900

World Material Handling Products

Global demand for material handling products is forecast to climb 4.0 percent annually through 2016 to \$123.6 billion. Opportunities will be best for sales of advanced equipment such as automated conveyors and automated guided vehicles. Among national markets, India and China will see the fastest gains. This study analyzes the \$101.4 billion global material handling product industry, with forecasts for 2016 and 2021 by product, market, world region and for 24 major countries. This study also evaluates company market share and profiles industry participants.

#2919 August 2012 \$6300

Construction Machinery in China

Demand for construction machinery in China is expected to rise 6.2 percent annually to 387 billion yuan in 2015. Cranes and excavators -- the dominant segment -- will be the fastest growing type, along with mixers and related equipment. The Central-East region will remain the largest market, while the Northwest region will grow the fastest. This study analyzes the 287 billion yuan construction machinery industry in China, with forecasts for 2015 and 2020 by product and region. The study also evaluates company market share and profiles industry participants.

#2855 May 2012 \$5400

World Plastics Processing Machinery

Global demand for plastics processing machinery is projected to rise 6.0 percent annually through 2015 to \$28.9 billion. Gains will be driven by developing nations, most notably in the Asia/Pacific region. Extrusion equipment will post the strongest gains by product, while construction will be the fastest growing market. This study analyzes the \$22 billion world plastics processing machinery industry, with forecasts for 2015 and 2020 by product, application, world region and for 30 countries. The study also evaluates company market share and profiles industry players.

#2833 January 2012 \$5900

Machine Tools in China

Machine tool demand in China will rise 14.2 percent annually through 2014, bolstering the country's position as the largest machine tool consumer and producer. The dominant metal cutting machine segment will slightly outpace metal forming types. The transportation equipment market will grow the fastest. This study analyzes the 200 billion yuan machine tool industry in China, with forecasts for 2014 and 2019 by product, market and region. The study also evaluates company market share and profiles industry participants.

#2757 August 2011 \$5400

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)