

China Packaging Machinery Industry Report, 2014-2017

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Abstracts

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.

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.

Contents

1. OVERVIEW OF PACKAGING MACHINERY INDUSTRY

- 1.1 Definition and Classification
- 1.2 Industry Characteristics
 - 1.2.1 Periodicity, Regionality, Seasonality
 - 1.2.2 Relevance between Upstream and Downstream
- 1.3 Industry-related Policies

2. PACKAGING MACHINERY MARKET

- 2.1 Market Size
 - 2.1.1 Global
 - 2.1.2 China
- 2.2 Regional Landscape
 - 2.2.1 Global
 - 2.2.2 China
- 2.3 Competitive Landscape

3. PACKAGING MACHINERY AUTOMATION MARKET

- 3.1 Scale and Structure
- 3.2 Servo
- 3.3 PLC

4. IMPORT & EXPORT

- 4.1 Global
 - 4.1.1 Import
 - 4.1.2 Export
- 4.2 China
 - 4.2.1 Import
 - 4.2.2 Export

5. APPLICATION DEMAND FOR PACKAGING MACHINERY

- 5.1 Distribution of Demand for Packaging Machinery in China
- 5.2 Food & Beverage Packaging Machinery Industry

- 5.2.1 Competitive Landscape
- 5.2.2 Liquid Food Packaging Machinery
- 5.2.3 Huge Potential for Metal Packaging Machinery
- 5.3 Pharmaceutical Packaging Machinery Industry
- 5.4 Household Chemicals Packaging Machinery Industry

6. FOREIGN PACKAGING MACHINERY COMPANIES

- 6.1 Krones
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Operating Revenue Structure
 - 6.1.4 Business in China
- 6.2 Sidel
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Business in China
- 6.3 Sacmi
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Business in China
- 6.4 KHS
 - 6.4.1 Profile
 - 6.4.2 Operation
- 6.5 Newlong
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Business in China

7. CHINESE PACKAGING MACHINERY COMPANIES

- 7.1 J.S. Corrugating Machinery Co., Ltd
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Operating Revenue Structure
 - 7.1.4 Cost Structure
 - 7.1.5 Major Customers and Suppliers
 - 7.1.6 Strategic Transformation in Industrial Automation
- 7.2 Guangzhou Tech-Long Packaging Machinery Co., Ltd.

- 7.2.1 Profile
- 7.2.2 Operation
- 7.2.3 Primary Businesses
- 7.2.4 Cost Structure
- 7.2.5 R&D and Investment
- 7.3 Newamstar Packaging Machinery Co., Ltd.
 - 7.3.1 Profile
 - 7.3.2 Operation
 - 7.3.3 Major Customers and Suppliers
 - 7.3.4 Revenue Breakdown by Product
 - 7.3.5 Revenue Breakdown by Region
 - 7.3.6 Operating Costs
 - 7.3.7 Gross Profit and Gross Margin
 - 7.3.8 Main Subsidiaries
- 7.4 Hangzhou Youngsun Intelligent Equipment
 - 7.4.1 Profile
 - 7.4.2 Operation
 - 7.4.3 Major Customers and Suppliers
 - 7.4.4 Revenue Breakdown by Product
 - 7.4.5 Revenue Breakdown by Region
 - 7.4.6 Operating Costs
 - 7.4.7 Profitability
 - 7.4.8 30,000 Sets/a Packaging Equipment Construction Project
- 7.5 Harbin Boshi Automation
 - 7.5.1 Profile
 - 7.5.2 Operation
 - 7.5.3 Operating Revenue Structure
 - 7.5.4 R&D Costs
 - 7.5.5 Progress of New Products
- 7.6 Beijing Dingsheng Rigao Packing Machinery Co., Ltd.
- 7.7 Anhui Zengran Packaging Technology Co., Ltd.
- 7.8 Foshan Soonk Packaging Machine Co., Ltd.
- 7.9 Zhongshan TO-U Packaging Machinery Co., Ltd
- 7.10 Nanjing Light Industrial Machinery Group

8. SUMMARY AND FORECAST

- 8.1 Market
 - 8.1.1 Scale

8.1.2 Development Trends
8.2 Companies

Selected Charts

SELECTED CHARTS

Classification of Packaging Machinery

Confidence Index and Prosperity Index of China Packaging Machinery Industry, 2012-2014

Relationship Diagram for Upstream and Downstream of Packaging Machinery Industry

Policies about Packaging Machinery Industry

Packaging Equipment Output and Growth Rate in China, 2007-2014

Total Revenue and Growth Rate of China Packaging Machinery Industry, 2007-2014

Total Profit and Growth Rate of China Packaging Machinery Industry, 2007-2014

Gross Margin of China Packaging Machinery Industry, 2007-2014

Buyers of Packaging Machinery Industry on Made-in-China.com (by Inquiry), Jan.-Nov. 2013

Packaging Equipment Output and Growth Rate in China (by Province & City), 2013-2014

Packaging Equipment Output in China (by Province & City), 2014 H1

Number of Packaging Machinery Manufacturers above Designated Scale in China, 2007-2014

Revenue from Packaging Equipment and Market Share of Major Packaging Machinery Companies in China, 2012-2013

Gross Margin of Packaging Equipment of Major Packaging Machinery Companies in China, 2013

Packaging Machinery Automation Market Scale in China, 2011-2017E

Revenue from and Market Share of Main Automatic Packaging Equipment in China, 2013

Proportion of Packaging Machinery Industry to Overall Servo Market, 2013

Market Share of Servo Suppliers in China Packaging Machinery Industry, 2013

Application of Various PLCs in Packaging Machinery

“Top of Mind” PLC Brands in Packaging Machinery Industry, 2013

Main Sources of Demand for Container Filling, Seaming and Labeling Machines, Container Wrapping Machines and Beverage Inflators (HS: 842230) (by Import Value), Jan-Jun 2013

Main Sources of Demand for Other Packing or Wrapping Machines (Including Shrink-packaging Machine) (HS: 842240) (by Import Value), Jan-Jun 2013

Main Exporters of Container Filling, Seaming and Labeling Machine, Container Wrapping Machines and Beverage Inflators (HS: 842230) (by Export Value), Jan-Jun 2013

Main Exporters of Other Packing or Wrapping Machine (Including Shrink-packaging Machine) (HS: 842240) (by Export Value), Jan-Jun 2013

Volume and Value of Imported Packaging Machinery by China, 2012-2014

Top 10 Sources of Imported Beverage and Liquid Food Filling Machines by China (by Import Value), Jan-Jul 2014

Top 10 Sources of Other Imported Filling Machines and Packing Machines by China (by Import Value), Jan-Jul 2014

Top 10 Sources of Imported Container Filling, Seaming, Labeling and Wrapping Machines and Beverage Inflators (by Import Value), Jan-Jul 2014

Volume and Value of Exported Packaging Machinery from China, 2012-2014

Top 20 Destinations of Exported Beverage and Liquid Food Filling Machines from China (by Export Value), Jan-Jul 2014

Top 10 Destinations of Exported Fully Automatic Cement Sack Filling Machines from China (by Export Value), Jan-Jul 2014

Top 10 Destinations of Other Exported Cement Sack Filling Machines from China (by Export Value), Jan-Jul 2014

Top 20 Destinations of Other Exported Filling Machines and Packing Machines from China (by Export Value), Jan-Jul 2014

Top 20 Destinations of Other Exported Container Filling, Seaming, Labeling and Wrapping Machines and Beverage Inflators from China (by Export Value), Jan-Jul 2014

Distribution of Demand for Packaging Machinery in China

Buzzword in Packaging Machinery Industry on Made-in-China.com, Sept-Nov 2013

Relationship between Upstream and Downstream of Liquid Food Packaging Machinery

Development Trend of Global Packaging Material, 2013-2017E

Pharmaceutical Packaging Machinery Output and Growth Rate in China, 2012-2017E

Pharmaceutical Packaging Machinery Sales Volume in China, Jan-May 2014

Synthetic Detergent/Washing Powder Output and Growth Rate in China, 2007-2014

Main Financial Indices of Krones, 2014H1

Revenue Structure of Krones by Division, 2013-2014

Revenue Breakdown of Krones by Region, 2013-2014

Branch Offices of Krones in China

Branch Offices of Sidel around the World

Revenue of Sidel, 2008-2013

Branch Offices of Sidel in China

Revenue Breakdown of Sacmi by Region, 2009-2013

Revenue from Packaging Division of Sacmi, 2013

Revenue and Employees of KHS, 2008-2013

Revenue Structure of KHS by Region, 2013

Revenue of Newlong, 2008-2012

Main Products of Newlong

Main Financial Indices of J.S. Machine, 2013-2014

Paper Product Packaging Machinery Output, Sales Volume and Inventory of J.S. Machine, 2012-2013

Revenue/Operating Costs Breakdown and Gross Margin of J.S. Machine by Product, 2013

Revenue Structure of J.S. Machine by Product, 2013

Operating Costs Structure of J.S. Machine by Product, 2013

Cost Structure of J.S. Machine's Paper Product Packaging Machinery, 2012-2013

J.S. Machine's Revenue from Top 5 Customers and % of Total Revenue, 2013

J.S. Machine's Procurement from Top 5 Suppliers and % of Total Procurement, 2013

Main Financial Indices of Tech-Long, 2013-2014

Liquid Packaging Machinery Output, Sales Volume and Inventory of Tech-Long, 2012-2013

Revenue/Operating Costs Breakdown and Gross Margin of Tech-Long by Product and by Region, 2014H1

Global Marketing Network of Tech-Long

Cost Structure of Tech-Long's Packaging Machinery Products, 2012-2013

R&D Costs of Tech-Long, 2011-2013

Packaging Machinery Projects with Raised Funds of Tech-Long, 2011-2014

Main Financial Indices of Newamstar, 2011-2013

Capacity, Output and Sales Volume of Main Products of Newamstar, 2011-2013

Proposed Investment Projects with Raised Funds of Newamstar

Newamstar's Revenue from Top 5 Customers and % of Total Revenue, 2013

Newamstar's Procurement from Top 5 Suppliers and % of Total Procurement, 2013

Newamstar's Revenue Breakdown and Percentage by Product

Revenue, Sales Volume and Changes in Unit Prices of Main Products of Newamstar, 2013

Revenue Breakdown of Newamstar by Region, 2011-2013

Operating Costs Structure of Newamstar, 2011-2013

Operating Profit Structure of Newamstar, 2011-2013

Consolidated Gross Margin of Newamstar, 2011-2013

Average Unit Prices/Costs and Gross Margin of Main Products of Newamstar, 2011-2013

Main Financial Indices of Youngsun, 2011-2013

Packaging Equipment Output and Sales Volume of Youngsun, 2013

Youngsun's Revenue from Top 10 Customers and % of Total Revenue, 2013

Youngsun's Procurement from Top 10 Suppliers and % of Total Procurement, 2013

Youngsun's Revenue Breakdown and Percentage by Product, 2011-2013

Youngsun's Revenue Breakdown from Packaging Equipment and Percentage by Product, 2011-2013

Youngsun's Revenue Breakdown from Packaging Equipment and Percentage by Region, 2011-2013

Operating Costs Structure of Youngsun, 2011-2013

Main Raw Material Costs of Youngsun, 2011-2013

Cost Structure of Youngsun's Packaging Equipment and Spare Parts

Consolidated Gross Margin, Operating Margin and Net Profit Margin of Youngsun, 2011-2013

Gross Profit and Gross Margin of Packaging Equipment and Spare Parts of Youngsun, 2011-2013

Main Financial Indices of Harbin Boshi Automation, 2013-2014

Revenue/Operating Costs Breakdown and Gross Margin of Harbin Boshi Automation by Product, 2014H1

Revenue/Operating Costs Breakdown and Gross Margin of Harbin Boshi Automation by Region, 2014H1

Cost Structure of Powder and Granule Fully Automatic Packaging and Stacking Complete Equipment, 2012-2013

R&D Costs of Harbin Boshi Automation, 2012-2013

Progress in New Products of Harbin Boshi Automation, 2014

Revenue and Output of China Packaging Machinery Industry, 2014-2017E

Major Chinese Packaging Machinery Manufacturers and Their Products

Output, Sales Volume and Sales-output Ratio of Major Chinese Packaging Machinery Manufacturers, 2013

Sales Volume of Major Chinese Packaging Machinery Manufacturers, 2014-2017E

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