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Beverage Containers in China

Industry Study with Forecasts for **2012 & 2017**

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Beverage Containers in China

Industry Study with Forecasts for *2012 & 2017*

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INDUSTRY STRUCTURE

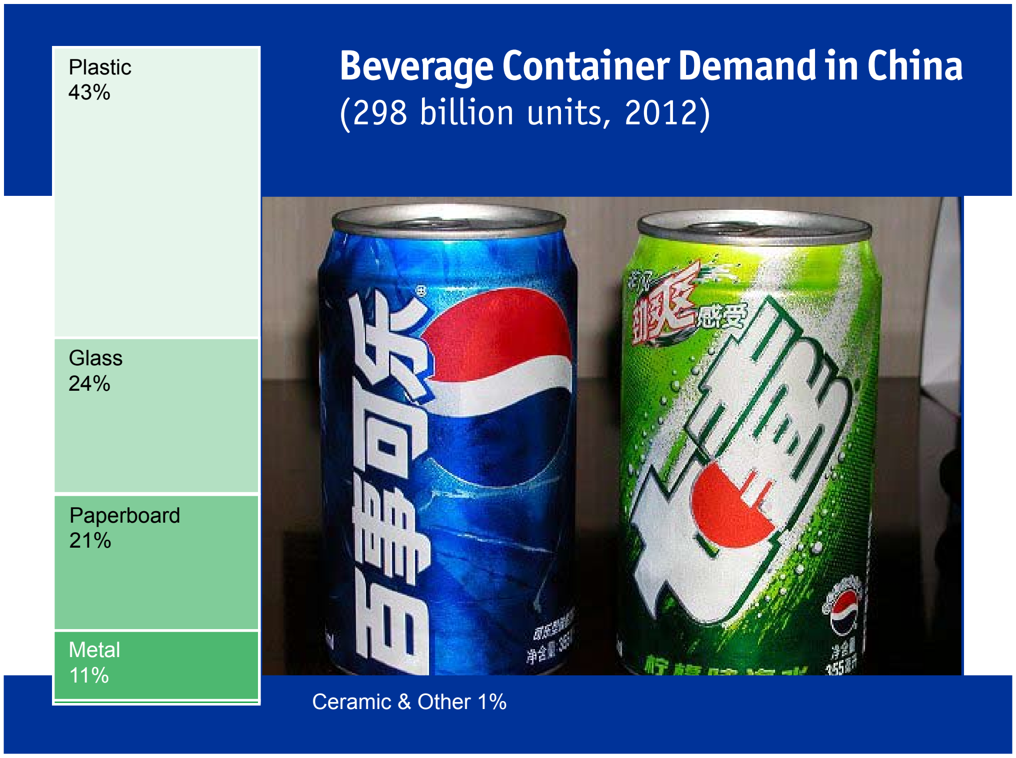
Beverage Containers in China

Industry Study with Forecasts for ***2012 & 2017***

Continued utilization of single-serving containers in many markets and high levels of new products with aggressive marketing efforts will help contribute to beverage container gains.

Demand in China to grow 8.2% yearly through 2012

Demand for beverage containers in China is projected to increase 8.2 percent per annum to 298 billion units in 2012. Gains will be driven by increasing personal income levels, which in turn will support robust growth in packaged beverage consumption. Continued utilization of single-serving containers in many markets and high levels of new product introductions accompanied by aggressive marketing efforts will also contribute to beverage container gains. In value terms, beverage container demand will outpace unit gains as a result of increases in average unit prices.



Beverage Container Demand in China
(298 billion units, 2012)

Plastic to continue supplanting metal, glass

Plastic containers, which accounted for 42 percent of unit beverage container demand in 2007, will continue to lead the market and capture market share from traditional metal and glass containers. Advances will be buoyed by plastic's increasingly widespread usage in almost all market segments. The rising popularity of smaller plastic bottles, such as single-serving PET bottles, will also support unit gains. In addition, improvements in plastic barriers, hot- and cold-fill processing, and other technologies will broaden the applications for plastic containers in beverages. Milk will remain the largest market for plastic containers as a result of the popularity of small-sized plastic pouches and single-serving bottles. Healthy growth is also expected in markets such as bottled water and fruit beverages.

Glass will remain the second largest beverage container material, with a projected market share of 24 percent of units in 2012. Gains will benefit from the upscale, premium image conveyed by glass. Beer will continue to offer the best prospects for glass bottles based on strong increases in beer consumption. Expanding use of nonreturnable beer bottles will additionally bolster sales gains in glass bottles. Increasing personal income levels will also contribute to the growing consumption of other beverages such as wine and fruit beverages, which have heavy demand for glass bottles.

Paperboard was the third largest beverage container material in 2007. Demand for paperboard containers is projected to represent the fastest growth among all beverage containers in China. Gains will track the favorable production outlook for milk, fruit beverages and other nonalcoholic beverages, benefiting from robust gains in consumer spending and sustained consumer interest in the health benefits of these beverages. Demand for metal cans will expand modestly, as they continue to lose ground to single-serving PET bottles. However, considerable production growth for beer and other non-carbonated soft drinks, which utilize a significant amount of metal cans, will boost demand.

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Sample Text, Table & Chart

PAPERBOARD CONTAINERS

Fruit Beverages

Demand for paperboard fruit beverage containers is exp... increase ... billion units in 2012. Pa... which w... everage container materi... and 200... by 2007, largely as a resu... transitio... tles. Offsetting losses to... degree w... aseptic boxes with long... shelf liv...

SAMPLE TEXT

Gabletop carton fruit beverage demand will benefit from... fruit beverage consumption, supported by increasing persona... levels and rising marketing campaigns that stimulate consum... in juices which tend to be packaged in gabletop cartons. Sale... be bolstered by several technological advances, including the advent of plastic pour spouts, which are easier to open than the traditional fold-out carton tops and offer the advantages of being leakproof and fully resealable, helping to maintain freshness; and the development of multi-ply barrier cartons, which also extend product shelf lives. However, gains will continue to be dampened by heightened competition from PET bottles for the packaging of fruit beverages.

Although aseptic cartons have some performance advantages, including shelf stability and convenience, competition from plastic bottles will continue to result in limited share growth for aseptic cartons. Plastic bottles will continue to supplant aseptic cartons in the fruit juice and drink market due to advantages of lower unit costs and growing preference among consumers for this format. Additionally, heightened competition from small-sized plastic bottles will negatively impact aseptic boxes. However, stacking advantages and the availability of reclosable pour spouts will provide some opportunities for aseptics in larger sizes, especially in foodservice applications. Competition from glass bottles, which are perceived as being superior in quality and better at preserving

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TABLE V-1

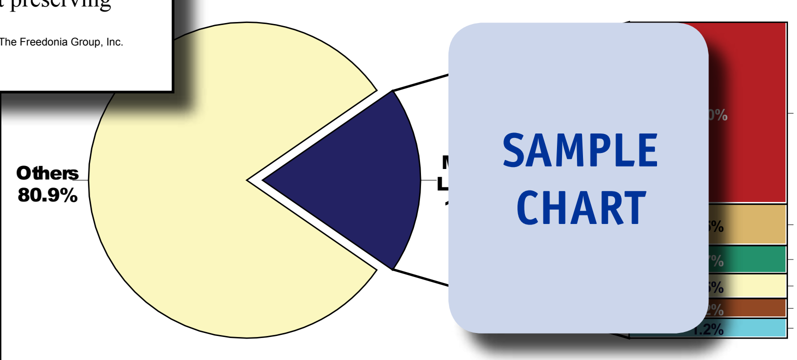
PLASTIC BEVERAGE CONTAINER DEMAND IN CHINA BY TYPE

Item	1997	2002	2007	2012	2017
Packaged Beverage Prdn (mil liters)					
% in plastic					
Bev Packaged in Plastic (mil liters)					
ml/container					
Plastic Bev Containers (mil units)					
Bottles					
Pouches & Other					
% plastic					
Total Beverage Containers (mil units)					
¥/unit					
Plastic Beverage Containers (mil ¥)					

SAMPLE TABLE

CHART IX-1

...EVERAGE CONTAINER MARKET SHARE IN CHINA BY COMPANY, 2007 (¥ 109 billion)



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Sample Profile, Table & Forecast

TABLE III-3

PACKAGED MILK PRODUCTION IN CHINA BY MATERIAL
(million liters)

Item	1997	2002	2007	2012	2017
Population (million persons)					1
liters per capita					4
Fluid Milk Consumption					0
+ net exports					0
Fluid Milk Production					0
% packaged	1				0
Packaged Milk Production					0
Paperboard					0
Plastic					0
Glass					0

SAMPLE TABLE

COMPANY PROFILES

Shanghai Skylong Aseptic Packaging Material Company
No. 1258, Zhuang Wu Road
Zhuanghang Europe Industrial Park
Fengxian District, Shanghai 201425
China
86-21-5746-27
http://www.cn

Annual Sales: company, 2/09)
Employment:

Key Products: g

International C er

SAMPLE PROFILE

Shanghai Skylong Aseptic Packaging Material manufactures multilayer, paper-based aseptic packaging and filling machines. The Company is a privately held enterprise.

The Company's multilayer, paper-based aseptic packaging is marketed under the SKYLONG brand name, and is made through a multilayer lamination process that provides oxygen barrier, thermal insulation and extended shelf-life properties. Typically, this packaging is used for such beverages as fruit and vegetable juices, milk, yogurt drinks and tea. Among the packaging products in the SKYLONG line are brick cartons, pillow pouches, wedge packs, classic packs and gabletop cartons. Shanghai Skylong Aseptic Packaging Material has developed a number of multilayer materials, including seven-layer plastic-paper-plastic compound materials designed to extend shelf life of products under normal temperatures to six to eight months. Gable-top cartons made out of this material is used by such Chinese beverage and food producers as Junyao Group Dairy Company Limited.

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"Demand for milk containers in China is forecast to increase 9.6 percent per year through 2012, reaching 97.6 billion units. Gains will be stimulated by the ongoing increase of milk consumption. However, the growing popularity of milk in larger-sized packaging will prevent container demand from increasing faster. The prevalence of milk from family-raised cows or goats in rural areas will continue to limit the demand for milk containers through the forecast period."
--Section III, pg. 48

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Other Studies

World Pharmaceutical Packaging

This study analyzes the global drug packaging industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by raw material, product (e.g., bottles and jars, blister packaging, pouches and strip packs, prefillable syringes, medication tubes, prefillable inhalers, parenteral vials and ampuls, IV containers, caps and closures), world region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major players

#2504 .... 06/2009..................... $6100

World Caps & Closures

Global cap and closure demand is forecast to rise 4.2% yearly through 2012, supported by the continuing growth of closure-intensive plastic packaging over closureless containers. Emerging markets will lead gains, although the US will see strong value gains based on an ongoing shift toward value-added configurations. This study analyzes the $29.7 billion world cap and closure industry, with forecasts for 2012 and 2017 by material, market, world region and for 18 countries. It also details market share and profiles industry players.

#2479 .... 03/2009..................... $5800

Green Packaging

US demand for packaging designed to lessen environmental impact is projected to grow 3.4% annually through 2013. Biodegradable plastic packaging and recycled content plastic packaging will grow the fastest. Reusable plastic containers and intermediate bulk containers will pace gains in the reusable packaging segment. This study analyzes the $37.2 billion US green packaging industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry players.

#2471 .... 03/2009..................... $4700

Cups & Lids

US demand for cups and lids will advance 4.3% annually through 2012. Drinking cups will remain the dominant cup type while packaging cups will grow the fastest. Growth in lids will outpace cups as more drinking cups use lids, especially higher-value specialty lids. Foodservice will remain the dominant market while food packaging grows more rapidly. This study analyzes the $6.3 billion US cup and lid industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major players.

#2429 .... 11/2008..................... $4600

Beverage Containers

US demand for beverage containers will grow 2.4% annually through 2012. Gains will be driven a healthy outlook for single serving containers and enhanced or functional beverages. Plastic containers will remain the largest and fastest growing segment. Bottled water will continue to post above-average market gains. This study analyzes the $22.5 billion US beverage container industry, with forecasts for 2012 and 2017 by type and market. It also evaluates company market share and profiles major players.

#2423 .... 11/2008..................... $4700

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