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World Packaging Machinery

Industry Study with Forecasts for **2014 & 2019**

Study #2727 | February 2011 | \$6100 | 417 pages



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Packaging machinery sales growth will be driven by an acceleration in manufacturing output, as well as by a favorable fixed investment environment worldwide.

Global demand to rise 4.7% yearly through 2014

Global demand for packaging machinery is projected to rise 4.7 percent annually through 2014 to \$35.9 billion, an improvement over market growth during the recession-impacted 2004-2009 period. Sales growth will be driven by an acceleration in manufacturing output, as well as by a favorable fixed investment environment worldwide.

Developing nations to be driving force behind gains

Gains in developing nations will be the driving force behind advances in the global market for packaging equipment. China, for example, will alone account for 41 percent of all additional demand through 2014, with growth stimulated by increases in manufacturing production and the use of packaging as industrialization efforts continue and income levels rise. Other nations in Asia with smaller, less-developed economies, such as India, Indonesia, Malaysia and Thailand, will also record healthy market gains. In developed areas of the world, most notably the US, Western Europe and Japan, demand will rebound after a period of decline, although sales advances will not be as strong as those in developing nations.

Labeling, coding machines to be fastest growing types

Growth in sales of labeling and coding machines, and filling and form/fill/seal

World Packaging Machinery Demand, 2014 (\$35.9 billion)



Asia/Pacific
49%

Western Europe
18%

North America
17%

Other Regions
16%

photo: Ciba

machines will be the fastest of any major product category through 2014. Demand for labeling and coding equipment will be driven by an increasing need for shippers to accurately track items for safety and security reasons, particularly in the food, beverage and pharmaceutical industries, as well as to help combat counterfeiting. Advances in sales of filling and form/fill/seal machinery will be spurred by continuing technological advances aimed at improving efficiency and flexibility, as well as by an expanding number of applications for this type of packaging equipment. As a result, filling and form/fill/seal machinery will solidify its position as the largest product segment, accounting for just under one-fourth of all packaging equipment demand in 2014.

Packaging equipment production will grow the fastest in the Asia/Pacific region. By 2014, this region's output will approximate that of the traditional packaging machinery manufacturing center of Western Europe, with each region accounting for over two-fifths of the global total. China, in particular, will post rapid output gains in the coming years. The country's packaging equipment shipments are forecast to grow rapidly through 2014, when they will account for 23 percent of worldwide production. Output advances in China will be attributable to growth in domestic consumption, additional investment by foreign multinationals in local plants and increased demand for Chinese machinery in a number of export markets.

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Sample Text, Table & Chart

ASIA/PACIFIC

to use outdated packaging machinery or purchase less expensive equipment. In addition, improvements in the quality and capacity of domestically made packaging equipment will dampen replacement demand through 2014. The enactment of the ordinance Restricting Export of Packaging on Food and Cosmetics on April 1, 2010 will likely increase demand for packaging machinery used in the food and cosmetics markets to some degree in the coming years, as the packaging process will require less equipment because fewer layers of packaging will be used by manufacturers not currently in compliance with these rules.

Shipments of packaging machinery from factories in China are expected to expand faster than demand, leading to a trade deficit. In addition, the current conditions and uncertainty of export markets for Chinese plants will affect the quality of machinery made. As a result, the industry is expected to become more competitive in global markets, resulting in strong export sales growth. Nevertheless, increases in shipments will be limited by the country's continued reliance on foreign suppliers for a number of sophisticated and specialized types of equipment.

More than 2,000 enterprises manufacture packaging equipment in the country, most of which are small companies making a limited range of machine types. Among the larger locally headquartered companies are Guangzhou Tech-Long Packing Machineries, Hunan China's Hualong Mechanical Machinery, Nanjing Light Machinery and Shanghai Light Machinery. Foreign multinationals with packaging equipment manufacturing operations in China include Avery Dennison, Bosch Packaging Technology, Coesia, Domino Printing Sciences, Ishida, Klöckner OPTIMA packaging group, SIG Combibloc, Sidel and SIPAC.

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SAMPLE TEXT

TABLE VI-3

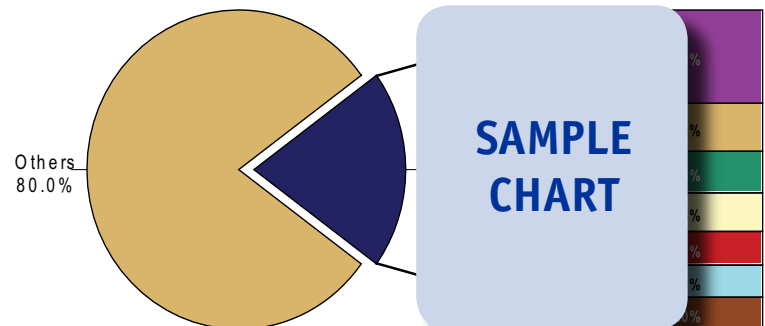
CHINA PACKAGING MACHINERY SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Population (million persons)	1,212	1,328	1,371	1,414	1,457
per capita GDP	959	1,914	3,124	4,124	5,124
Gross Domestic Product (bil 2008\$)	10,163	30,663	58,796	86,916	115,036
% fixed investment	35.2	36.1	37.0	37.9	38.8
Gross Fixed Investment (bil 2008\$)	3,583	11,068	21,756	32,869	44,624
Manufacturing Value Added (bil 2008\$)	10,163	30,663	58,796	86,916	115,036
\$ machinery/capita	8.3	14.4	22.4	29.0	35.0
\$ machinery/000\$ fixed investment	23.5	15.8	12.7	9.0	7.8
\$ machinery/000\$ mfg value added	0.82	0.47	0.38	0.33	0.30
Packaging Machinery Demand (mil \$)	83	144	224	290	350
net exports	0	0	0	0	0
Packaging Machinery Shipments (mil \$)	0	0	0	0	0
% China	0	0	0	0	0
Asia/Pacific Pkg Machinery Shpts (mil \$)	0	0	0	0	0

SAMPLE TABLE

CHART VIII-1

WORLD PACKAGING MACHINERY MARKET SHARE BY COMPANY (\$28.6 billion, 2009)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-4
CHINA PACKAGING MACHINERY
DEMAND BY PRODUCT & MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Asia/Pacific Pkg Machinery Demand % China					
China Packaging Machinery Demand					
By Product:					
Filling & Form/Fill/Seal					
Labeling & Coding					
Wrapping, Bundling & Palletizing					
Case Forming, Packing & Sealing					
Other Machinery					
Parts					
By Market:					
Food					
Beverages					
Pharmaceuticals & Personal Care					
Chemical Products					
Other					

SAMPLE PROFILE

SAMPLE TABLE

COMPANY PROFILES

Fuji Machinery Company Limited

4-380, Nakaotai, Nishi Ku
 Nagoya 451
 Japan
 81-52-502-12
<http://www.fuji-machinery.com>

Annual Sales:
 Employment:

Key Products: The Company manufactures a wide range of wrapping equipment; including horizontal form-fill-seal (FFS) wrapping systems.

Fuji Machinery is a privately held producer of wrapping and other machines for confectionery, meat, bakery, cheese, coffee and prepared food markets. The Company operates manufacturing sites in Nagoya and Mino, Japan.

The Company's packaging machinery offerings include horizontal, vertical, stretch film and other wrapping equipment. Fuji Machinery's horizontal form/fill/seal (FFS) wrapping machines are available in standard, extra large, high-speed, shrink, stainless steel, and three- and four-side varieties. The Company makes vertical FFS units for use in the packaging of liquids, powders, flowable products and bulk solids. Stretch film wrapping machines are designed to produce a leak-proof package. Other types of wrapping equipment from Fuji Machinery include FW30ASW compact models for wrapping cakes and FW39 compact varieties for wrapping triangular sandwiches. In addition to wrapping machines, it manufactures other packaging machinery, including inline feeders, and case packing and cartoning systems.

Fuji Machinery markets its products via its headquarters office in Nagoya, Japan, as well as via the Fuji Packaging GmbH (Germany)

"Demand for packaging machinery in China is projected to rise at an 8.8 percent annual pace through 2014 to \$8.8 billion, significantly decelerating from the pace of the 2004-2009 period but remaining one of the fastest growing markets in the world. Product sales will be driven by continued advances in manufacturing production and packaging materials use as industrialization efforts continue and income levels rise."
 --Section VI, pg. 161-2

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OTHER STUDIES

World Commercial Refrigeration Equipment

Global demand for commercial refrigeration equipment will rise 5.2 percent annually through 2014. Demand will benefit from an acceleration in the key US market and above-average growth in the Asia/Pacific region. Beverage equipment will post the fastest gains among products. This study analyzes the \$23.1 billion world commercial refrigeration equipment industry. It presents historical demand data and forecasts for 2014 and 2019 by product, world region and for 27 countries. It also evaluates company market share and profiles industry players.

#2706 January 2011 \$5900

World Material Handling Products

Global demand for material handling products will rise 6.5 percent annually through 2014. The US will be among the fastest growing markets, along with India and China. Conventional products will benefit from recovery in developed areas while advanced/automated types will post the best gains. This study analyzes the \$82 billion global material handling product industry, with forecasts for 2014 and 2019 by type, market, world region and for 37 countries. It also evaluates company market share and profiles industry participants.

#2687 October 2010 \$6100

World Aquaculture: Feed, Equipment & Chemicals

Global demand for aquaculture supplies and equipment will grow 11.6 percent annually through 2014. The Asia/Pacific region will continue to dominate both production and consumption. Aquafeed will remain the largest product segment and be the fastest growing. This study analyzes the world aquaculture supplies and equipment industry, with forecasts for 2014 and 2019 by product, species, world region and for 15 countries. It also evaluates company market share and profiles industry participants.

#2680 October 2010 \$5800

World Agricultural Equipment

Global demand for agricultural equipment will rise 4.5 percent per year through 2014, paced by the accelerating mechanization of the farm sectors in developing countries. Replacement demand will define the industrialized world, led by "precision agriculture" equipment that use GPS and wireless sensors. This study analyzes the \$99.2 billion world agricultural equipment industry, with forecasts for 2014 and 2019 by type, world region and for 26 countries. It also evaluates company market share and profiles industry participants.

#2666 August 2010 \$5900

Packaging Machinery in China

Demand for packaging machinery in China will grow 8.7 percent yearly through 2014, driven by growth in packaged food and beverages, drugs and personal care products. Filling and form/fill/seal equipment will remain the largest segment, while labeling and coding types grow the fastest. This study analyzes the 39.2 billion yuan packaging machinery industry in China, with forecasts for 2014 and 2019 by product, market and Chinese region. It also evaluates company market share and profiles industry participants.

#2638 May 2010 \$5300

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