World Packaging Machinery

Industry Study with Forecasts for 2014 & 2019

Study #2727 | February 2011 | $6100 | 417 pages
# World Packaging Machinery

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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 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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Asia/Pacific

to use outdated packaging machinery or purchase less expensive rebuilt equipment. In addition, improvements in the quality and capabilities of domestically made packaging equipment will dampen replacement sales through 2014. The enactment of the ordinance Restricting Excessive Packaging on Food and Cosmetics on April 1, 2010 will likely constrain 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 applied by manufacturers not currently in compliance with these rules.

Shipments of packaging machinery from factories in China are forecast to expand 9.7 percent per year through 2014 to $8.3 billion, growing faster than demand and leading to a reduction in the size of the country’s trade deficit. Production growth will be spurred by healthy local market conditions and increased demand for Chinese equipment in a number of export markets. Additional investment by foreign multinationals in Chinese plants will help boost manufacturing capacity and improve 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 producers are Guangzhou Tech-Long Packing Machineries, Hunan Chinasun Pharmaceutical Machinery, Nanjing Light Machinery and Shanghai Tobacco Machinery. Foreign multinationals with packaging equipment manufacturing operations in China include Avery Dennison, Bosch Packaging Technology, Coesia, Domino Printing Sciences, Ishida, Klöckner-Werke, OPTIMA packaging group, SIG Combibloc, Sidel and Sipa.

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**Table VI-3**

<table>
<thead>
<tr>
<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (million persons)</td>
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<td></td>
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</tr>
<tr>
<td>per capita GDP</td>
<td></td>
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<td></td>
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<tr>
<td>Gross Domestic Product (bil 2008$)</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>% fixed investment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Fixed Investment (bil 2008$)</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Manufacturing Value Added (bil 2008$)</td>
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<tr>
<td>$ machinery/capita</td>
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<tr>
<td>$ machinery/000$ fixed investment</td>
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<tr>
<td>$ machinery/000$ mfg value added</td>
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<td></td>
</tr>
<tr>
<td>Packaging Machinery Demand (mil $)</td>
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<td></td>
<td></td>
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<tr>
<td>net exports</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Packaging Machinery Shipments (mil $)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia/Pacific Pkg Machinery Shpts (mil $)</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Chart VIII-1**

**World Packaging Machinery Market Share by Company**

($28.6 billion, 2009)

- Others 80.0%
- $2.6 billion, 2009
- $2.0 billion, 2009
- $1.8 billion, 2009
- $1.6 billion, 2009
- $1.2 billion, 2009
- $1.0 billion, 2009
- $0.8 billion, 2009
- $0.6 billion, 2009
- $0.4 billion, 2009
- $0.2 billion, 2009
Sample Profile, Table & Forecast

COMPANY PROFILES

Fuji Machinery Company Limited
4-380, Nakaotai, Nishi Ku
Nagoya 451
Japan
81-52-502-1211
http://www.fujikikai-inc.co.jp

Annual Sales: $130 million (estimated)
Employment: 550 (estimated)

Key Products: Horizontal, vertical, stretch film and other wrapping equipment; inline feeders; and case packing and cartoning 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).

TABLE VI-4

CHINA PACKAGING MACHINERY DEMAND BY PRODUCT & MARKET
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia/Pacific Pkg Machinery Demand</td>
<td>6580</td>
<td>8570</td>
<td>12600</td>
<td>17450</td>
<td>23400</td>
</tr>
<tr>
<td>% China</td>
<td>22.6</td>
<td>27.5</td>
<td>45.6</td>
<td>50.2</td>
<td>54.1</td>
</tr>
<tr>
<td>China Packaging Machinery Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Product:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filling &amp; Form/Fill/Seal</td>
<td>430</td>
<td>680</td>
<td>1680</td>
<td>2600</td>
<td>3820</td>
</tr>
<tr>
<td>Labeling &amp; Coding</td>
<td>230</td>
<td>380</td>
<td>940</td>
<td>1480</td>
<td>2190</td>
</tr>
<tr>
<td>Wrapping, Bundling &amp; Palletizing</td>
<td>220</td>
<td>360</td>
<td>900</td>
<td>1360</td>
<td>2000</td>
</tr>
<tr>
<td>Case Forming, Packing &amp; Sealing</td>
<td>120</td>
<td>190</td>
<td>480</td>
<td>760</td>
<td>1100</td>
</tr>
<tr>
<td>Other Machinery</td>
<td>280</td>
<td>430</td>
<td>1050</td>
<td>1570</td>
<td>2240</td>
</tr>
<tr>
<td>Parts</td>
<td>210</td>
<td>320</td>
<td>690</td>
<td>990</td>
<td>1300</td>
</tr>
<tr>
<td>By Market:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>470</td>
<td>790</td>
<td>1840</td>
<td>2830</td>
<td>4120</td>
</tr>
<tr>
<td>Beverages</td>
<td>270</td>
<td>460</td>
<td>1150</td>
<td>1850</td>
<td>2780</td>
</tr>
<tr>
<td>Pharmaceuticals &amp; Personal Care</td>
<td>150</td>
<td>260</td>
<td>720</td>
<td>1220</td>
<td>1870</td>
</tr>
<tr>
<td>Chemical Products</td>
<td>180</td>
<td>230</td>
<td>610</td>
<td>860</td>
<td>1190</td>
</tr>
<tr>
<td>Other</td>
<td>420</td>
<td>620</td>
<td>1420</td>
<td>2000</td>
<td>2690</td>
</tr>
</tbody>
</table>

"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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