



China Packaging Machinery Industry Report, 2014-2017

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.

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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.

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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.

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Table of Content

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

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