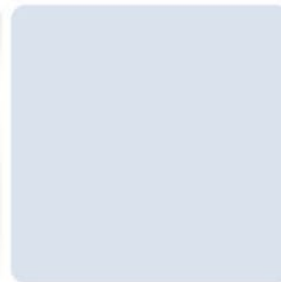


Blow Molding Machine

Industry Analysis Report

2012.08



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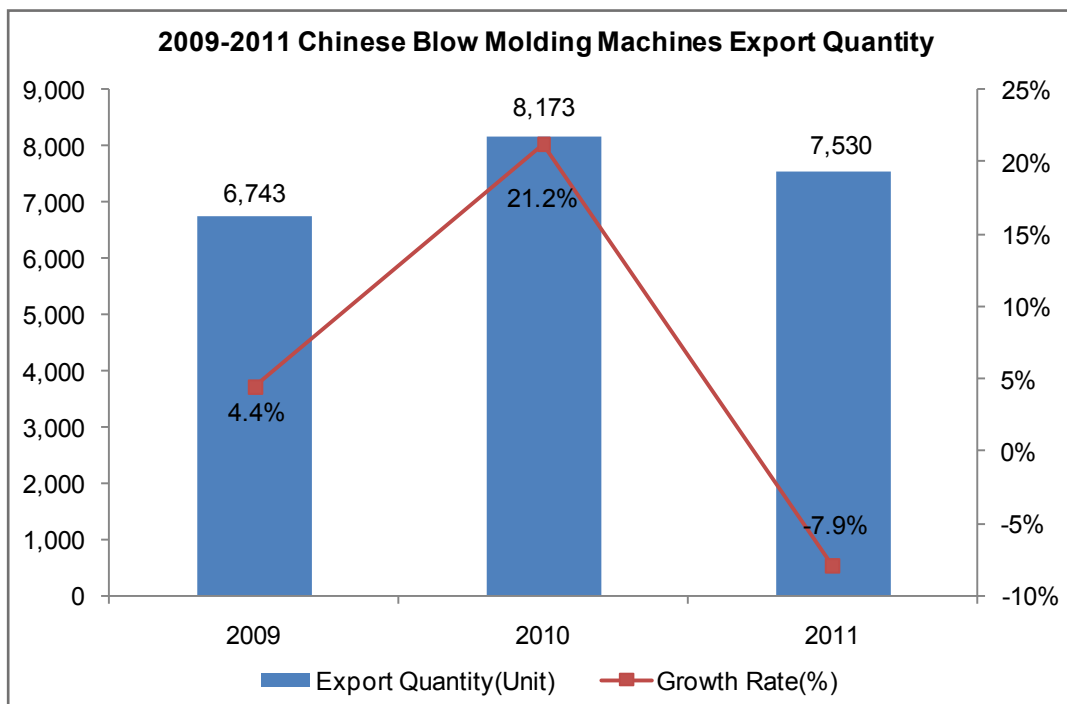
Produced by IAR Team
Focus Technology Co., Ltd

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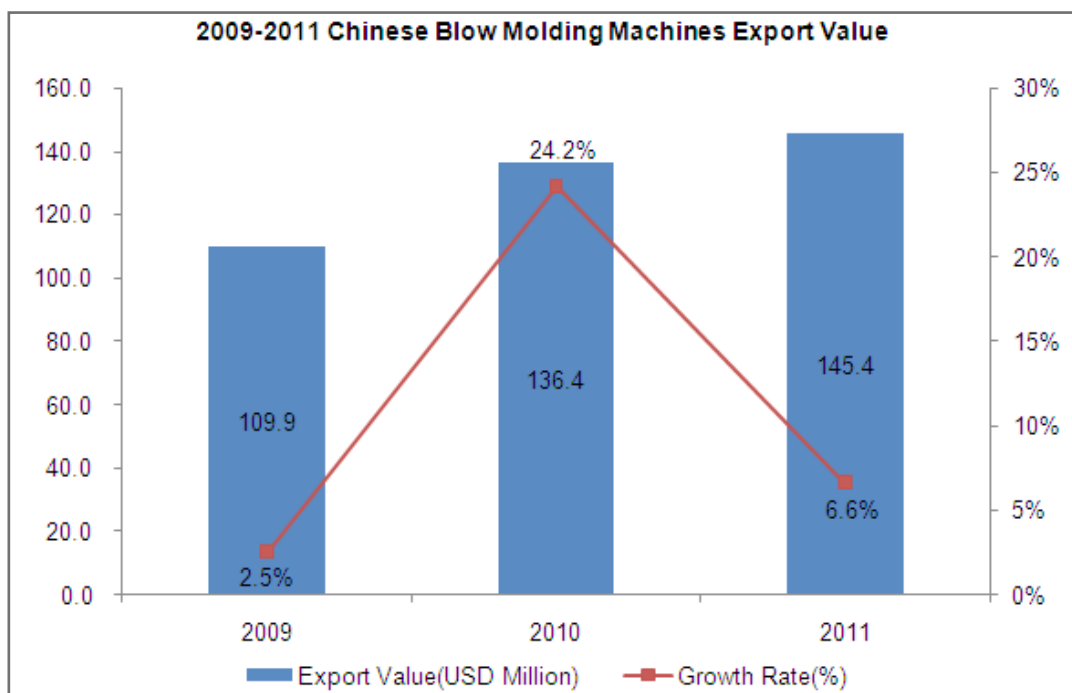
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1. 2009-2011 Chinese Blow Molding Machines (HS: 847730) Export Trend Analysis

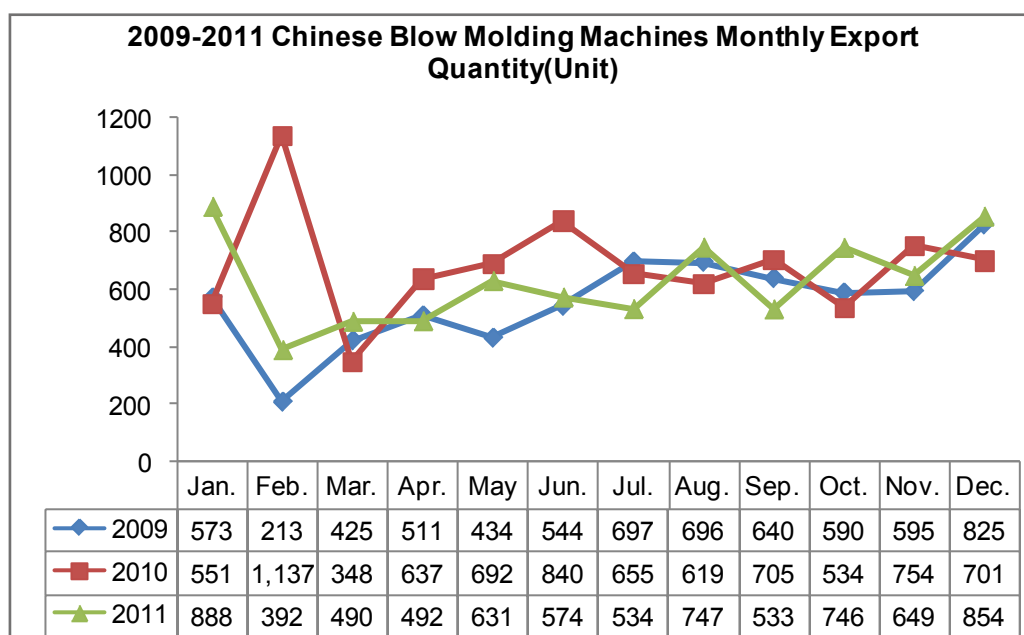
- 2009-2011 Chinese Blow Molding Machines Export Quantity



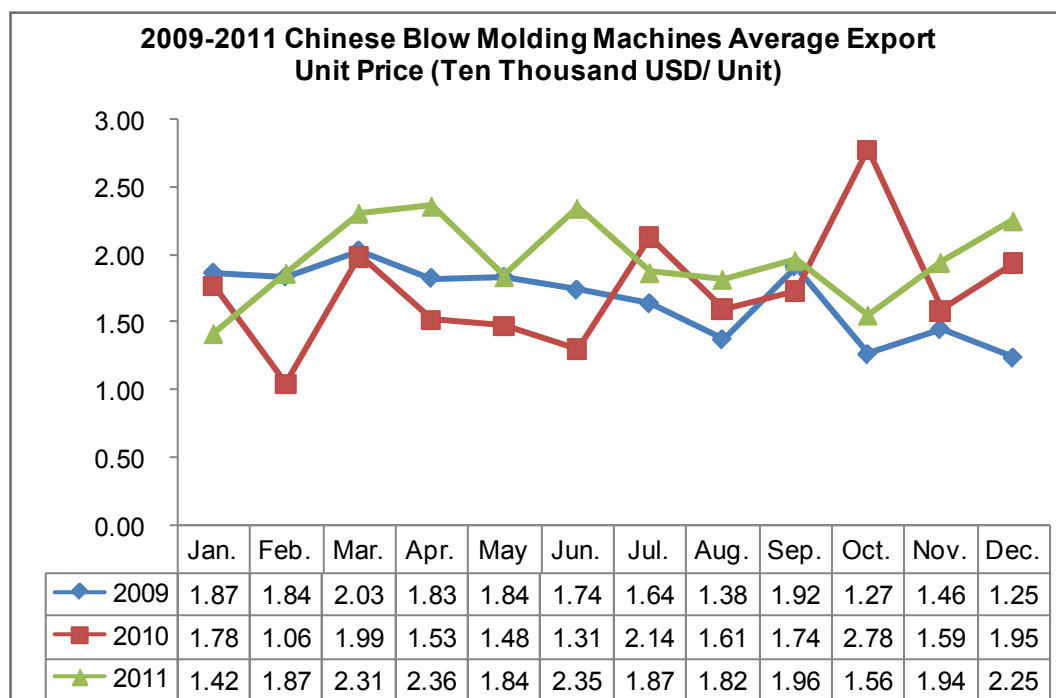
- 2009-2011 Chinese Blow Molding Machines Export Value



- 2009-2011 Chinese Blow Molding Machines Monthly Export Quantity



- 2009-2011 Chinese Blow Molding Machines Monthly Average Export Unit Price (Ten Thousand USD/ Unit)



In 2011, the total export quantity of Chinese blow molding machines was 7,530 units, with a drop of 7.9% compared to 2010.

The total export value of Chinese blow molding machines grew continuously from 2009 to 2011, which has achieved 0.145 billion dollars in 2011, up 6.6% over 2010. The statistics shows that the

export value of 2011 grew slower obviously than that of 2010 in the field of Chinese blow molding machines.

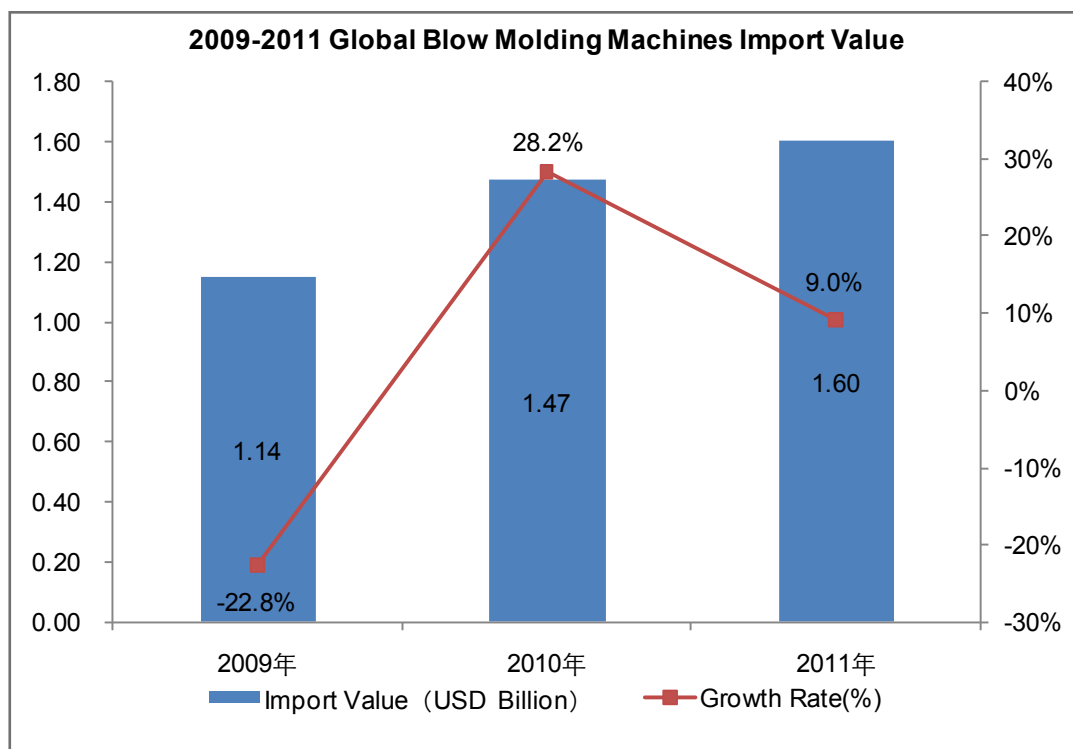
As can be seen from the line chart of 2009-2011 Chinese blow molding machines monthly export quantity, the total export quantity of the second half was slightly higher than that of the first half; besides, February hit the trough of industry exports in 2009 and 2011.

According to the line chart of 2009-2011 Chinese blow molding machines average export unit price, Chinese blow molding machines average export unit price fluctuated the most in 2010, and both the lowest and the highest average export unit price were in 2010, which was 1.06 ten thousand dollars per unit in February and 2.78 ten thousand dollars per unit in October.

From the changes in the price level of the whole year, the average export unit price of 2011 grew sharply, up 15.7% over 2010; meanwhile, the average export unit price of 2010 achieved a slightly increase of 2.4% compared to 2009.

2. 2009-2011 Global Blow Molding Machines (HS: 847730) Import Trend Analysis

- 2009-2011 Global Blow Molding Machines Import Value



In the year between 2009 and 2011, Global blow molding machines import value increased year by year. The total import value of 2011 was 1.6 billion dollars, up 9.0% year on year, but its growth rate fell down compared to 2010.

- Major Global Blow Molding Machines Importers from 2009 to 2011

No.	Countries/Regions	Import Value(US Dollar Million)			Amount in 2011 Compared with 2009(%)
		2009	2010	2011	
1	China	179.3	301.5	268.2	149.55%
2	USA	99.5	122.3	156.1	156.90%
3	Indonesia	25.5	41.9	71.9	282.10%
4	Mexico	42.1	57.5	69.6	165.51%
5	Japan	31.5	43.6	68.7	217.92%
6	Brazil	37.9	53.8	61.9	163.17%
7	Thailand	29.0	51.9	58.4	201.17%
8	Saudi Arabia	0.0	24.3	49.7	/
9	Austria	43.0	40.3	44.0	102.31%
10	Russian Federation	10.0	24.2	38.2	382.28%
11	Germany	19.4	19.6	35.0	180.08%
12	France	26.0	47.4	33.2	127.62%

No.	Countries/Regions	Import Value(US Dollar Million)			Amount in 2011 Compared with 2009(%)
		2009	2010	2011	
13	South Korea	17.4	25.2	29.8	171.81%
14	India	23.7	36.3	29.7	125.37%
15	Malaysia	19.1	22.0	27.0	141.28%
16	Argentina	8.9	14.5	26.8	303.15%
17	South Africa	11.3	16.8	23.9	210.74%
18	Italy	34.0	36.7	23.2	68.26%
19	Poland	15.7	21.9	21.9	139.62%
20	Vietnam	16.5	19.3	21.2	128.52%

China is the largest importer of the blow molding machines, and the import value reached 268 million dollars in 2011, accounting for 16.77% of the total global import value. Followed by the USA, its import value was up to 156 million dollars in 2011, occupied 9.76% of the total global import value. Among the top 20 countries and regions mentioned above, in comparison with 2009, the three largest increased countries and regions in 2011 were Russian Federation (up 382.28%), Argentina (a rise of 303.15%) and Indonesia (an increased by 282.10%); meanwhile, the top three countries and regions with largest increase of import value in 2011 were as follows: China (a rise of 89 million dollars), USA (an increased by 57 million dollars) and Saudi Arabia (up 50 million dollars).

● The Market Share of Major Global Blow Molding Machines Importers from 2009 to 2011

No.	Countries/Regions	Proportion of Import Value (%)		
		2009	2010	2011
1	China	15.67%	20.55%	16.77%
2	USA	8.69%	8.33%	9.76%
3	Indonesia ↑	2.23%	2.86%	4.50%
4	Mexico ↑	3.67%	3.92%	4.35%
5	Japan ↑	2.76%	2.97%	4.30%
6	Brazil ↑	3.31%	3.67%	3.87%
7	Thailand ↑	2.53%	3.54%	3.65%
8	Saudi Arabia ↑	0	1.66%	3.11%
9	Austria	3.76%	2.74%	2.75%
10	Russian Federation ↑	0.87%	1.65%	2.39%
11	Germany	1.70%	1.34%	2.19%
12	France	2.27%	3.23%	2.08%
13	South Korea ↑	1.52%	1.72%	1.86%
14	India	2.07%	2.47%	1.86%
15	Malaysia	1.67%	1.50%	1.69%
16	Argentina ↑	0.77%	0.99%	1.68%

No.	Countries/Regions	Proportion of Import Value (%)		
		2009	2010	2011
17	South Africa ↑	0.99%	1.14%	1.49%
18	Italy ↓	2.97%	2.50%	1.45%
19	Poland	1.37%	1.49%	1.37%
20	Vietnam	1.44%	1.32%	1.32%

Note: “↑” indicates that the proportion covered by import value in the total global import value grew continuously from 2009 to 2011. “↓” shows that the proportion covered by import value in the total global import value declined continuously from 2009 to 2011.

According to the table, the countries and regions which proportion covered by import value in the total global import value grew continuously from 2009 to 2011 were as follows: Indonesia, Mexico, Japan, Brazil, Thailand, Saudi Arabia, Russian Federation, South Korea, Argentina and South Africa. Among all the countries and regions mentioned above, Saudi Arabia grew the most sharply, which was up 3.11% in 2011 compared to 2009. Italy was the country which proportion covered by import value in the total global import value declined continuously, with a drop of 1.52% in 2011 in comparison with 2009.

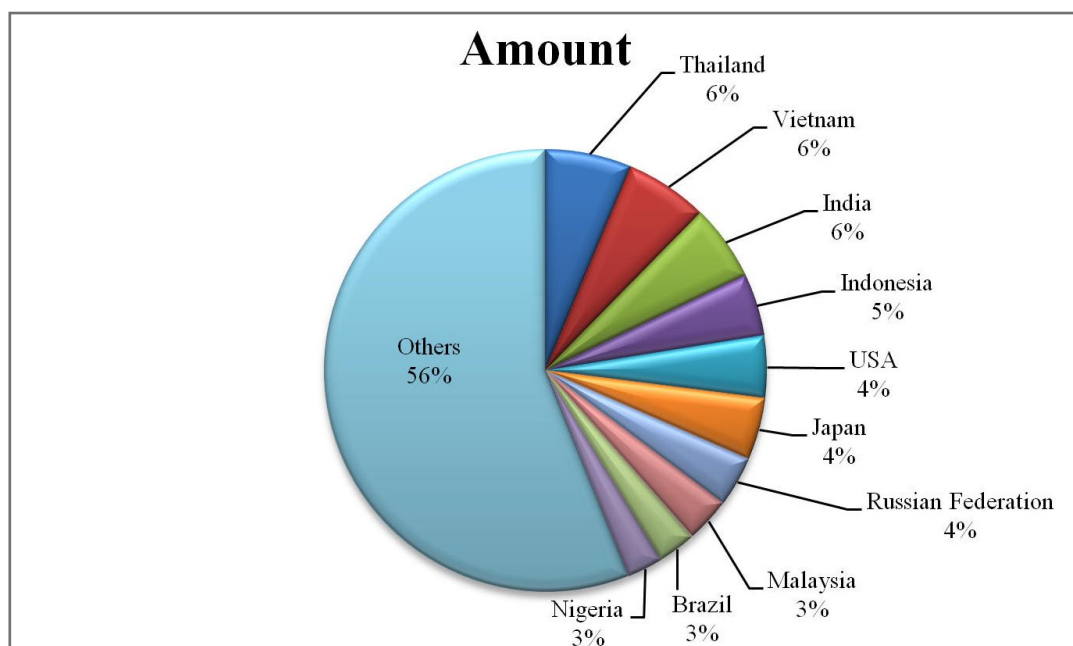
3. 2012 Chinese Blow Molding Machines (HS: 847730) Exports

- Export Quantity & Value for Chinese Blow Molding Machines in the First Half of 2012

Month	Export Quantity(Unit)	Export Value (USD Million)	Year on Year (±%)	
			Quantity	Value
Jan.	1,876	15.5	111.3	23.2
Feb.	264	8.0	-32.7	9.5
Mar.	567	10.4	15.7	-8.2
Apr.	497	10.4	1	-10.3
May	670	14.5	6.2	25
Jun.	4,083	12.9	611.3	-4.5
Total	7,957	71.7	129.5	5.6

- Major Importers for Chinese Blow Molding Machines in the first half of 2012

No.	Countries/Regions	The First Half of 2012		Year on Year (±%)	
		Export Quantity (Ton)	Export Value (USD Thousand)	Quantity	Value
1	Thailand	130	4,527	42.9	33.5
2	Vietnam	169	4,327	5	31.8
3	India	160	3,990	48.1	78.6
4	Indonesia	129	3,268	-9.2	-3.8
5	USA	59	3,259	-43.8	44.4
6	Japan	36	3,253	500	178.6
7	Russian Federation	127	2,646	33.7	26.6
8	Malaysia	106	2,351	-10.2	5.7
9	Brazil	45	1,984	-43	-10.6
10	Nigeria	211	1,886	16.6	-15.4
11	HK	46	1,755	119	125
12	France	10	1,652	0	0
13	Egypt	147	1,519	23.5	-14.4
14	South Africa	52	1,492	-60.9	-11.7
15	Saudi Arabia	91	1,356	46.8	-43
16	Chile	36	1,303	16.1	4.7
17	Iran	92	1,282	-39.9	-76.8
18	Ukraine	15	1,208	-57.1	143.5
19	Burma	52	1,147	0	188.2
20	Algeria	200	1,138	63.9	48



Major Cities/Provinces for Chinese Blow Molding Machines Export in the first half of 2012

No.	City/Province	The First Half of 2012		Year on Year (±%)		Proportion of Export Value (%)
		Export Quantity (Unit)	Export Value (USD Thousand)	Quantity	Value	
1	Zhejiang	3,334	28,503	62.2	4.3	39.74%
2	Guangdong	461	14,996	-21.7	-13.2	20.91%
3	Jiangsu	253	9,232	1.2	-4.9	12.87%
4	Beijing	9	5,732	0	223.1	7.99%
5	Shanghai	3,594	4,296	2971.8	16.8	5.99%

In the first half of 2012, Chinese blow molding machines achieved an export quantity of 7,957 units in total, with a rise of 129.5% year on year; and the export value reached 0.72 billion dollars, up 5.6% year on year.

The major importers were Thailand, Vietnam, India, Indonesia, USA, Japan, Russian Federation, Malaysia, Brazil and Nigeria and so on. In the first half of 2012, Chinese blow molding machines export value for Thailand accounted for 6.31% of the total export value of Chinese blow molding machines.

The Major cities/provinces of export source of Chinese blow molding machines were as follows: Zhejiang, Guangdong, Jiangsu and Shanghai, in which Zhejiang's cumulative export value of Chinese blow molding machines occupied 39.735% of the total export value of Chinese blow molding machines.

4. 2012 Major Global Blow Molding Machines (HS:847730) Importers

Major Blow Molding Machines Exporters for USA from January to May in 2012

Countries/Regions	Import Value From Jan. to May in 2012 (USD Thousand)	Year on Year (±%)	Proportion (%)
Total	58,992	-20.93%	100.00%
Germany	21,943	-21.03%	37.20%
Japan	8,355	-40.66%	14.16%
France	8,073	-41.09%	13.68%
Italy	7,529	92.31%	12.76%
Switzerland	4,521	-26.71%	7.66%
Thailand	2,183	53.30%	3.70%
Poland	1,850	/	3.14%
China	1,255	-61.24%	2.13%
Canada	931	327.06%	1.58%
Taiwan, China	865	-69.84%	1.47%

Note: The statistics shows that USA imported none of the blow molding machines from Poland from January to May in 2012.

From Jan. to May in 2012, the import value for American blow molding machines was up to 0.59 billion dollars, with a drop of 20.93% year on year. Germany was the largest blow molding machines exporter for American, which owned 37.20% of the total import value. It's worth noting that the first five months in 2012, American import value of blow molding machines from Canada increased 327.06%, with a significantly growth; while American import value of blow molding machines from China decreased 61.24%.

Major Blow Molding Machines Exporters for Mexico from January to May in 2012

Countries/Regions	Import Value From Jan. to May in 2012 (USD Thousand)	Year on Year (±%)	Proportion (%)
Total	62,523	168.24%	100.00%
France	19,449	297.49%	31.11%
Germany	16,776	183.86%	26.83%
Italy	5,976	217.53%	9.56%
Switzerland	3,372	97.66%	5.39%
USA	2,756	-24.51%	4.41%
Belgium	2,639	835.82%	4.22%
Japan	2,300	29.87%	3.68%
Canada	2,117	1842.20%	3.39%
Austria	1,668	465.42%	2.67%
Spain	1,402	15.68%	2.24%

From Jan. to May in 2012, Mexico imported blow molding machines about 0.63 billion dollars, up 168.24% year on year. France was the largest blow molding machines exporter for Mexico, which occupied 31.11% of the total import value. Followed by Germany, its percentage was 26.83%.

- Major Blow Molding Machines Exporters for Japan in the first half of 2012

Countries/Regions	Import Value In The First Half of 2012 (USD Thousand)	Year on Year (±%)	Proportion (%)
Total	32,535	0.97%	100.00%
Germany	15,058	14.22%	46.28%
India	8,901	-21.26%	27.36%
France	3,037	-30.18%	9.33%
China	2,656	133.60%	8.16%
Taiwan, China	1,848	23.45%	5.68%
Turkey	634	/	1.95%
Thailand	208	/	0.64%
Belgium	141	-32.21%	0.43%
USA	50	-84.08%	0.15%

Note: the statistics shows that Japan imported none of the blow molding machines from Turkey and Thailand in the first half of 2012.

In the first half of 2012, Japan imported blow molding machines about 0.33 billion dollars, a rise of 0.97% year on year. Germany was the largest blow molding machines exporter for Japan, which accounted for 46.28% of the total import value. Followed by India, its percentage was 27.36%. China was the fourth largest blow molding machines exporter for Japanese, and in the first half of 2012, Japan import value of blow molding machines from China grew up to 133.60%, with a sharply growth.

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Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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