China Aluminum Plastic Film Industry Report, 2014-2017

Description: Aluminum plastic film is a packaging material of polymer li-ion battery (also known as soft-package lithium-ion battery). It is one of the most technically complicated tasks in the field of battery materials.

In recent years, China’s soft-package lithium-ion battery market has expanded rapidly. During 2009-2013, there were up to 131 new entrants in Chinese soft-package lithium battery industry. In 2013, the market size of soft-package lithium battery in China totaled RMB10.83 billion, up 27% from a year earlier. It is projected that in 2014 this figure will climb to about RMB14 billion.

Benefiting from the rapid growth of soft-package lithium-ion battery market, the demand for aluminum plastic film in China keeps expanding year by year, with aluminum plastic film accounting for around 15% of costs of soft-package lithium battery. In 2013, the demand for aluminum plastic film in China reached 36.5 million square meters and the market size hit RMB1.5 billion, occupying 13.9% of soft-package lithium battery market size. It is estimated that in 2014 the aluminum plastic film demand in China might amount to 45.81 million square meters and the market size would hit RMB1.95 billion.

Like the global competitive landscape, China’s aluminum plastic film market has been dominated by the Japanese and south Korean companies, including DNP, Showa Denko, Toppan Printing, and Youl Chon Chemical. Driven by the factors like rapid growth of market demand and technological progress, a few companies including Zijiang Enterprise, FSPG, Zhongjin Matai, Heze Tianxin, as well as Daoming Optics began to set foot in aluminum plastic film industry, among which Zijiang Enterprise, FSPG, Zhongjin Matai, and Heze Tianxin have achieved mass production. In future, China’s aluminum plastic film industry is expected to embrace growth in both demand expansion and import substitution.

The aluminum plastic film of Zijiang New Material, a subsidiary of Zijiang Enterprise, has obtained the certification from large lithium battery manufacturers such as ATL, Coslight Group, and Lishen Battery. Meanwhile, the company began to supply products to ATL in small patch, with the current monthly supply of 80,000-100,000 square meters.

FSPG’s aluminum-plastic film project started the approval procedure in 2008, and the product structure design was completed in 2008-2011 and the construction of the plant and supporting facilities was finished in 2011-2012. In mid-2012, it began trial production and invited the customer to mass trial-evaluation. In 2013, the company started small-batch sales. At present, the company has delivered aluminum plastic film products to more than 100 customers, and most of the battery plants are conducting battery packaging in batch.

In 2013, Daoming Optics & Chemical began to venture into aluminum plastic film industry by constructing a 5-million-m2 lithium battery packaging film production line. In November 2014, the company announced a non-public offering plan, under which its capacity would be expanded to 15 million square meters through fundraising. At present, Daoming Optics has produced the samples of aluminum plastic film and has delivered them to customers for testing. But they have not achieved mass production.

China Aluminum Plastic Film Industry Report, 2014-2017 mainly focuses on the following:
- Current situation, competition pattern, and development trend, etc. of China's aluminum plastic film industry;
- Influences of downstream sectors on the development of aluminum plastic film industry;
- Operation, revenue structure, gross margin, and aluminum plastic film business of 4 foreign companies and 4 Chinese enterprises;
- Development forecast of China's aluminum plastic film industry and operation of major enterprises.

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