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World Plastics Processing Machinery

Industry Study with Forecasts for **2012 & 2017**

Study #2381 | October 2008 | \$5600 | 418 pages

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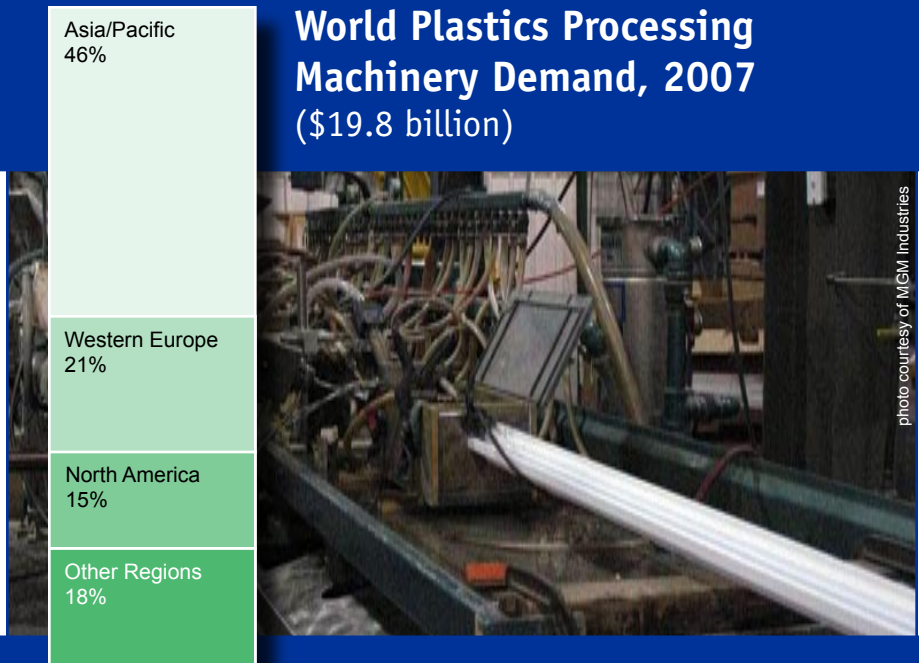
China will post the largest gains of any national market, with plastics processing equipment demand in the country accounting for close to one-fourth of the global market by 2012.

Global demand to climb 4.7% yearly through 2012

Global demand for plastics processing machinery is forecast to climb 4.7 percent annually through 2012 to almost \$25 billion. Product sales will be spurred by ongoing economic growth and rising personal income levels, resulting in increased plastics product consumption, processing activity and associated equipment demand.

Product sales in developing parts of Asia, Eastern Europe, Africa, the Middle East and Latin America will outpace demand in the developed countries of the US, Western Europe and Japan through 2012. Advances will be stimulated by healthy economic growth, ongoing industrialization efforts and higher per capita income in these developing areas. China will post the largest gains of any national market, with plastics processing equipment demand in the country rising by over \$1.6 billion from 2007 to 2012, when China will account for close to one-fourth of the global market. Two of the other three BRIC nations -- India and Russia -- will also record strong advances, while machinery sales growth in Brazil will be more subdued, due in part to the double-digit annual increases in demand that have been registered in recent years. Gains are expected to be healthy as well in lower-volume markets such as the Czech Republic, Iran, Malaysia, Saudi Arabia, Turkey and Vietnam.

World Plastics Processing Machinery Demand, 2007 (\$19.8 billion)



Plastics processing equipment demand in developed parts of the world will expand as well, although growth will be much less robust than in developing countries. Product sales will be driven by generally favorable economic conditions and further increases in plastics processing activity in developed areas, bolstering demand for plastics processing machinery as fixed investment activity climbs.

Extrusion equipment to post strongest gains

Extrusion equipment will post the strongest gains of any major product type through 2012, benefitting from growth in global construction spending,

which will fuel demand for extruded goods like pipe and siding, as well as by further advances in extrusion technology, resulting in increased sales of higher priced, more productive machinery. Demand for reaction injection molding, rotomolding, and rapid prototyping and manufacturing machinery, which does not require the use of molds and can replace injection molding in some low-volume applications, will also grow rapidly. However, injection molding equipment will continue to account for almost two-fifths of the 2012 plastics processing machinery market total, benefitting from the greater accuracy, energy efficiency, flexibility and output of newer generations of equipment.

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Sample Text, Table & Chart

ASIA/PACIFIC

groups. Other structural problems include deteriorating air quality; inefficient use of capital investment; below-average efficiency; lack of access to health care; and, over the coming decade...

China: Supply & Demand

China is by far the largest market for plastics processing machinery, but production in China has nearly tripled since 1997, while equipment sales have edged down. Growth in the Chinese market has been spurred by its rapid industrialization, leading to large increases in plastic processing activity and consumption of a wide variety of plastics products. Sales gains would have been even stronger were it not for fierce competition from used and refurbished machinery.

Plastics processing equipment output has also surged in China over the last decade, growing sixfold from 1997 to 2007, when shipments totaled \$3.15 billion, making China the second largest producer in the world behind Germany. Domestic manufacturers make all of the major machinery types in large quantities, with injection molding systems accounting for the largest single share of industry output. China is a net importer of plastics processing equipment, although the size of the trade deficit -- which was equivalent to 27 percent of domestic demand in 2007 -- has declined as local production levels have climbed. The nation is particularly dependent on foreign manufacturers for technologically advanced, automated machinery, since most locally made equipment is not considered up to global standards. The biggest foreign sources of supply are Japan, Germany, Taiwan, South Korea and Italy. Chinese manufacturers also sell their products overseas, with important export markets including Japan, India, Turkey, Vietnam and Thailand.

SAMPLE TEXT

TABLE VI-3

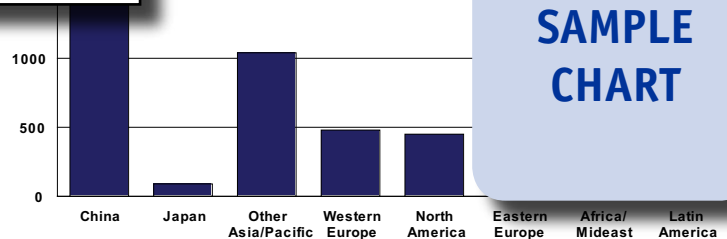
CHINA -- PLASTICS PROCESSING MACHINERY SUPPLY & DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Population (millions)	1235	1283	1321	1361	1401
per capita GDP	2220	3170	5150	7640	10600
Gross Domestic Product (bil 2006\$)	2710	4077	6000	10100	14250
% fixed investment	31	31	31	31	31
Gross Fixed Investment (bil 2006\$)	840	1264	1860	3131	4418
Plastics Demand (000 metric tons)	1100	1300	1500	1700	1900
\$ machinery/capita	18	25	39	56	79
\$ machinery/000\$ fixed investment	21	20	21	18	18
\$ machinery/m ton plastics	16	19	26	33	42
Plastics Processing Machinery Demand	1000	1200	1400	1600	1800
net exports	0	0	0	0	0
Plastics Processing Machinery Shpts	1000	1200	1400	1600	1800
% China	7	7	7	7	7
Asia/Pacific Plastics Proc Mach Shpts	4100	5170	7810	10650	14400

SAMPLE TABLE

CHART III-2

ADDITIONAL PLASTICS PROCESSING MACHINERY DEMAND - 2012 VS. 2007 (\$5.1 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-7
WORLD BLOW MOLDING MACHINERY DEMAND BY REGION
 (million dollars)

Item	1997	2002	2007	2012	2017
Plastics Processing Machinery Demand1					100
% blow molding					27
Blow Molding Machinery Demand	1				30
North America:					50
United States					90
Canada & Mexico					50
Western Europe					20
Asia/Pacific:					30
China					20
Japan					20
Other Asia/Pacific					50
Other Regions:					10
Latin America					40
Eastern Europe					50
Africa/Mideast					20

SAMPLE PROFILE

COMPANY PROFILES

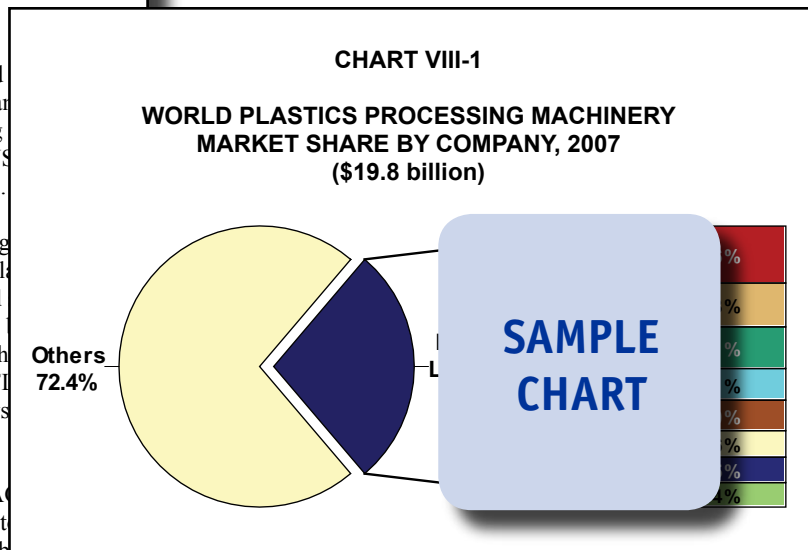
Gloucester Engineering Company Incorporated
 Blackburn Industrial Park
 11 Dory Road
 Gloucester, MA
 978-281-1800
 http://www.gl

Annual Sales:
 Employment:
 Key Products:

Gloucester Engineering Company produces extruders and plant production equipment for plastics and films. The Company which formerly operated as Battenfeld Gloucester Engineering Company Limited, was purchased from SMS GmbH (Germany) by US Mousam Ventures LLC, a private equity firm, in October 2007.

The Company participates in the world plastics processing machinery industry through the production of extruders and related products for blown film, cast film, extrusion coating, foam and manufacturing applications. Among Gloucester Engineering's film machines are CONTRACOOOL air-cooled extruders, which are designed to process high-melt-temperature materials; and OPTIFIL low-profile dies, AUTOPROFILE and POLYCOOL air ring systems, cages and collapsers, and oscillating haul-off components.

For cast film applications, the Company makes CONTRACOOOL air-cooled extruders; MODEL 700 film casting units designed to produce, coat and emboss film products for the food, medical and barrier packaging industries; and self-contained embossing units designed for



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OTHER STUDIES

World Packaging Machinery

This study analyzes the global packaging machinery industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., filling and form/fill/seal; labeling and coding; wrapping, bundling and palletizing; case forming, packaging and sealing), market (e.g., food, beverages, pharmaceuticals/personal care products, chemical products), world region and major country. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2444 12/2008..... \$5700

Machine Tools in China

Machine tool demand in China will grow 13% yearly through 2012, based on rapid growth in durable goods production and infrastructure expansion and modernization. Metal cutting tools will outpace other products, spurred by strong growth in manufacturing investment. Industrial machinery will remain the largest market. This study analyzes the 328.5 billion yuan machine tools industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2390 09/2008..... \$5100

World Material Handling Products

Global demand for material handling products will grow 5% annually through 2012, with the strongest gains in rapidly developing areas such as China and India. Growth in the nondurable goods sector will outpace the larger durable goods manufacturers market. Advanced/automated products will grow the fastest. This study analyzes the \$104.6 billion world material handling product industry, with forecasts for 2012 and 2017 by type, market, world region and 37 countries. It also evaluates market share and profiles industry players.

#2392 09/2008..... \$5700

Packaging Machinery in China

Chinese packaging equipment demand will rise 8% yearly through 2011, fueled by strong manufacturing output and rising domestic incomes. Filling and form/fill/seal equipment will remain the largest segment while labeling and coding machinery leads gains. Packaged food and beverages will stay the top markets. This study analyzes the ¥35 billion Chinese packaging machinery industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2300 02/2008..... \$4900

Industrial Controls

US demand for industrial controls will reach \$15.4 billion in 2011. Advanced controls will outpace conventional types and boost demand for software and system integration services. Durable goods industries, which include electrical/electronic equipment and machinery, will remain the largest market while service industries grow the fastest. This study analyzes the US industrial controls industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.

#2269 11/2007..... \$4400

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