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World Plastics Processing Machinery

Industry Study with Forecasts for **2015 & 2020**

Study #2833 | January 2012 | \$5900 | 392 pages

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Sales growth will be driven by an acceleration in plastic product manufacturing, a concurrent build up in plastics manufacturing infrastructure, and a favorable fixed investment environment worldwide.

Global demand to rise 6% annually through 2015

Global demand for plastics processing machinery is projected to rise 6.0 percent annually through 2015 to \$28.9 billion, a rebound from market declines experienced during the recession-impacted 2005-2010 period. Sales growth will be driven by an acceleration in plastic product manufacturing, as well as by a favorable fixed investment environment worldwide. Many nations are building up their plastics manufacturing infrastructure, due to both rising domestic demand for plastics-consuming goods and export opportunities to developed nations. Plastics processing machinery production will grow the fastest in the Asia/Pacific region through 2015, expanding 7.7 percent per year.

Developing nations to be driving force in demand

Gains in developing nations will be the driving force behind advances in the global market for plastics processing equipment. China, for example, will account for over 40 percent of all additional global demand through 2015, with growth stimulated by strong increases in plastic manufacturing as industrialization efforts continue and income levels rise. Other nations in Asia with smaller, less-developed economies, such as India, Vietnam 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

World Plastics Processing Machinery Demand, 2015 (\$28.9 billion)



Asia/Pacific
56%

Western Europe
16%

North America
12%

Other Regions
16%

photo: Qingdao Leader Machinery Co., Ltd.

period of decline, although sales advances will not be as strong as those in developing nations.

Extrusion equipment to post strongest gains

Among major product types, extrusion equipment will post the strongest gains through 2015, benefiting from growth in global construction spending, that will fuel demand for extruded goods like pipe and siding. Injection molding equipment will remain the largest product segment, accounting for 40 percent of demand in 2015. Injection molding machines are used in a wide array of applications, ranging from automotive components to consumer goods to medical supplies.

Construction, consumer/institutional products to be fastest growing markets

The construction market will post the strongest gains through 2015, benefiting from an acceleration in global construction spending. The consumer/institutional products market will also post solid gains, reflecting rising standards of living. The packaging market will post respectable gains due to rising manufacturing output and consumer demand for packaged products. In addition, plastic will continue to gain market share from other materials in applications such as bottles.

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Sample Text, Table & Chart

ASIA/PACIFIC

Thailand: Outlook & Suppliers

Sales of plastics processing machinery in Thailand are expected to grow from \$100 million in 2010 to \$130 million in 2015, an average of 6.4% per annum. The forecast is based on the assumption that the region will experience a sharp rise in investment in machinery through the second half of 2011. This will be due to a number of factors, particularly the impact of major flooding that occurred during the second half of 2011.

SAMPLE TEXT

Major flooding that occurred during the second half of 2011 had a significant impact on demand in the short term. A large percentage of plastics processing machines in the nation were damaged by the floods, which led to replacement or significant repairs, boosting parts demand. In the longer term, examples of new demand include increased parts production. For example, Walbro Engine Management, a US firm, is building a new blow molding plant in Chonburi for customers in the Asia-Pacific region. The facility will start with one line and has capacity for multiple machines. The company makes multilayer fuel tanks for non-automotive customers.

Shipments of plastics processing machinery from facilities in Thailand are expected to grow 8.4 per annum to \$120 million in 2015, above both the global and regional average. Although output continues to outpace demand in Thailand, the country's trade deficit will widen further.

Plastics processing machinery suppliers in Thailand include firms like Labtech Engineering, Sabmann Blasformtechnik, and Thai Hydraulic Machinery. In addition, Nissei Plastic Industry has a technical center in Sumutprakam. Most other foreign multinationals participate in the local industry principally through sales, distribution, and service operations. Toshiba Machine is expected to establish a presence in the market.

173

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TABLE VI-10

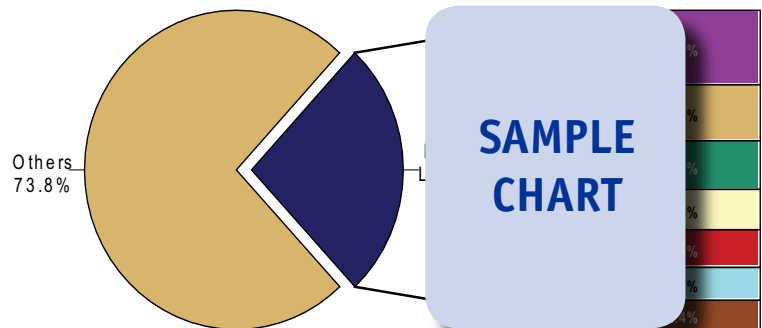
THAILAND: PLASTICS PROCESSING MACHINERY DEMAND BY PRODUCT & PRIMARY APPLICATION (million dollars)

Item	2000	2005	2010	2015	2020
Asia/Pacific Plastic Processing Machinery % Thailand					
Thailand Plastics Processing Machinery					
By Product:					
Injection Molding Machinery					
Extrusion Machinery					
Blow Molding Machinery					
Thermoforming & Other Machinery					
Plastics Machinery Aftermarket Parts					
By Primary Application:					
Packaging					
Consumer/Institutional					
Construction					
Other	30	60	90	130	170

SAMPLE TABLE

CHART VIII-1

WORLD PLASTICS PROCESSING MACHINERY MARKET SHARE BY COMPANY, 2010 (\$21.6 billion)

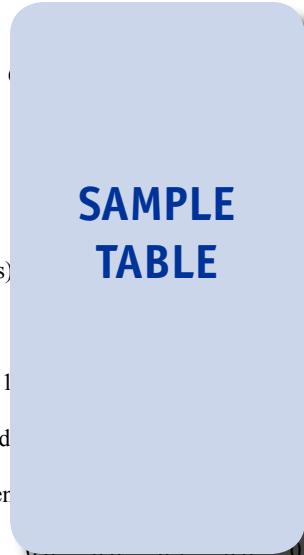


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-9
THAILAND: PLASTICS PROCESSING MACHINERY
SUPPLY & DEMAND
 (million dollars)

Item	2000	2005	2010	2015	2020
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2009\$)					
% fixed investment					
Gross Fixed Investment (bil 2009\$)					
Plastic Resin Demand (000 metric tons)					
\$ machinery/capita					
\$ machinery/000\$ fixed investment					
\$ machinery/m ton plastics					
Plastics Processing Machinery Demand					
net exports					
Plastics Processing Machinery Shipments					
% Thailand					
Asia/Pacific Plastics Proc Mach Shpts	4730	7100	10840	15715	21190



COMPANY PROFILES

Industrias Romi SA
 Avenida Perola Byington 56
 Santa Barbara d'Oeste, São Paulo 13453
 Brazil
 55-19-34
 http://www

SAMPLE PROFILE

Revenue
 Employ
 Key Pro

Indu... manufacturer of machine tools and plastics injection molding machines. The Company operates through three segments: Machine Tools, Plastic Processing Machines, and Rough and Machined Cast Iron Parts.

The Company is active in the world plastics processing machinery industry via the Plastic Processing Machines segment, which manufactures and markets injection molding and blow molding machinery. This equipment is sold via the ROMI and SANDRETTO product lines.

The ROMI product line encompasses both injection molding and blow molding equipment. ROMI injection molding machines include PRÁCTICA, VELOX, EL and PRIMAX models. ROMI PRÁCTICA machines are horizontal models with five-point, mechanical-hydraulic bi-toggle clamping systems and reinforced platens. The Company's ROMI VELOX product injection molding equipment comprises hybrid units with ultra-fast cycles that are used to make thin-wall packaging for food, disposable goods and other applications. Industrias Romi's ROMI EL machinery is engineered to use up to 60-percent less energy

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"Plastics processing machinery demand in Thailand was \$520 million in 2010. After experiencing robust growth in the 2000-2005 period, sales growth plummeted to 3.4 percent per year between 2005 and 2010. Gains in the plastics processing machinery market were adversely impacted by a sharp deceleration in fixed investment spending growth."

--Section VI, pg. 172

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OTHER STUDIES

Custom Thermoplastic Compounding

US demand for custom compounded thermoplastics is forecast to rise 5.0 percent annually to 11.4 billion pounds in 2017, valued at \$14.3 billion (resin content only). Construction will offer the best market prospects, as the industry recovers from recession. PVC represents the largest and fastest growing compounded thermoplastic. This study analyzes the 8.9 billion pound US custom compounded thermoplastic industry, with forecasts for 2017 and 2022 by resin and market. The study also evaluates company market share and profiles industry players.
 #2991 February 2013 \$5100

Packaging Machinery in China

Demand for packaging machinery in China will increase 7.5 percent annually to 40 billion yuan in 2016. Filling and form/fill/seal equipment will remain the largest segment, while labeling and coding equipment will continue as the fastest growing. The medical, pharmaceutical and personal care market will lead gains. This study analyzes the 27.8 billion yuan packaging machinery industry in China, with forecasts for 2016 and 2021 by product, market and geographic region. The study also evaluates company market share and profiles industry participants.
 #2918 July 2012 \$5400

Bioplastics

US demand for biodegradable and non-biodegradable bio-based resins is forecast to climb at a 20 percent annual pace through 2016 to 550 million pounds. Polylactic acid will remain the largest bioplastic segment, while bio-based polyethylene and degradable polyesters will grow the fastest at double-digit rates. Nonpackaging markets will outpace packaging uses. This study analyzes the 220 million pound US bioplastic industry, with forecasts for 2016 and 2021 by resin, product and market. The study also evaluates company market share and profiles industry players.
 #2908 June 2012 \$4900

High Performance Composites

US demand for polymer materials containing advanced fiber reinforcements is forecast to rise almost 15 percent per year to \$10.2 billion in 2016. Aerospace will remain the dominant and fastest growing market, followed by the energy market. Carbon will continue as the dominant and most rapidly growing fiber, followed by S-glass. This study analyzes the \$5.1 billion US high performance composite industry, with forecasts for 2016 and 2021 by fiber, market and resin. The study evaluates company market share and profiles industry players.
 #2905 June 2012 \$4900

World Thermoplastic Elastomers

Global demand for thermoplastic elastomers (TPEs) will rise 6.3 percent annually through 2015. Gains will be driven by rebounding motor vehicle production in the US and Western Europe. Advances will also be fueled by the rising use of TPEs in the developing countries, where these materials are continuing to penetrate new applications. This study analyzes the 4.1 million metric ton world TPE industry, with forecasts for 2015 and 2020 by market, product, world region and for 15 countries. The study also evaluates company market share and profiles industry players.
 #2803 September 2011 \$6400

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