World Plastics Processing Machinery

Industry Study with Forecasts for 2015 & 2020

Study #2833 | January 2012 | $5900 | 392 pages
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1 World Plastics Processing Machinery Market Share by Company, 2010 ........ 276
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 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.
Thailand: Outlook & Suppliers

Sales of plastics processing machinery in Thailand are expected to grow 7.9 percent per year through 2015 to $760 million, an acceleration from the pace of the 2005-2010 period and above the forecast pace for the region as a whole. Demand will be spurred by a sharp rise in fixed investment expenditures. However, market increases through 2015 will be dampened to some degree by slowing gains in manufacturing output, particularly in the food and beverage segment.

Major flooding that occurred during the second half of 2011 will impact demand in the short term. A large percentage of plastics processing machines in the nation were damaged by the floods, which will lead 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-based 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, Thai Hydraulic Machinery. In addition, Nissei Plastic Industries, 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 an injection

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**TABLE VI-10**

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<td>5360</td>
<td>8130</td>
<td>11510</td>
<td>16150</td>
<td>21410</td>
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<td>% Thailand</td>
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<td>5.4</td>
<td>4.5</td>
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<td>Thailand Plastic Processing Machinery</td>
<td>200</td>
<td>440</td>
<td>520</td>
<td>760</td>
<td>1030</td>
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<td>By Product:</td>
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<td>Injection Molding Machinery</td>
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<td>225</td>
<td>260</td>
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<td>105</td>
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<td>Blow Molding Machinery</td>
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<td>85</td>
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<td>Thermoforming &amp; Other Machinery</td>
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<td>Plastics Machinery Aftermarket Parts</td>
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<td>By Primary Application:</td>
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<td>70</td>
<td>160</td>
<td>180</td>
<td>270</td>
<td>370</td>
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<tr>
<td>Consumer/Institutional</td>
<td>70</td>
<td>160</td>
<td>180</td>
<td>260</td>
<td>360</td>
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<td>Construction</td>
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<td>Other</td>
<td>30</td>
<td>60</td>
<td>90</td>
<td>130</td>
<td>170</td>
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**CHART VIII-1**

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

*Copyright 2012 The Freedonia Group, Inc.*
Sample Profile, Table & Forecast

COMPANY PROFILES

Industrias Romi SA
Avenida Perola Byington 56
Santa Barbara d’Oeste, São Paulo  13453
Brazil
55-19-3455-9000
http://www.romi.com.br

Employment:  2,760 (2010)
Key Products:  injection molding and blow molding machines

Industrias Romi is a leading Brazilian 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

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

<table>
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<td>per capita GDP</td>
<td>6150</td>
<td>7600</td>
<td>8800</td>
<td>10810</td>
<td>13250</td>
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<tr>
<td>Gross Domestic Product (bil 2009$)</td>
<td>381</td>
<td>488</td>
<td>582</td>
<td>734</td>
<td>921</td>
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<tr>
<td>% fixed investment</td>
<td>23.3</td>
<td>27.5</td>
<td>24.5</td>
<td>26.0</td>
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<td>Gross Fixed Investment (bil 2009$)</td>
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<td>134.2</td>
<td>142.5</td>
<td>190.9</td>
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<td>Plastic Resin Demand (000 metric tons)</td>
<td>1340</td>
<td>1770</td>
<td>2300</td>
<td>3050</td>
<td>3700</td>
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<tr>
<td>$ machinery/capita</td>
<td>3.23</td>
<td>6.85</td>
<td>7.87</td>
<td>11.19</td>
<td>14.82</td>
</tr>
<tr>
<td>$ machinery/000$ fixed investment</td>
<td>2.25</td>
<td>3.28</td>
<td>3.65</td>
<td>3.98</td>
<td>4.42</td>
</tr>
<tr>
<td>$ machinery/m ton plastics</td>
<td>149.3</td>
<td>248.6</td>
<td>226.1</td>
<td>249.2</td>
<td>278.4</td>
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<td>Plastics Processing Machinery Demand</td>
<td>200</td>
<td>440</td>
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<tr>
<td>net exports</td>
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<td>Plastics Processing Machinery Shipments</td>
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<td>0.7</td>
<td>0.8</td>
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<td>Asia/Pacific Plastics Proc Mach Shpts</td>
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<td>7100</td>
<td>10840</td>
<td>15715</td>
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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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<td>☐ Corporate Use License (add to study price) *</td>
<td>+ $2600</td>
</tr>
<tr>
<td>☐ Additional Print Copies @ $600 each *</td>
<td></td>
</tr>
<tr>
<td>Total (including selected option) $</td>
<td></td>
</tr>
<tr>
<td>☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)</td>
<td></td>
</tr>
<tr>
<td>☐ Bill my company</td>
<td>☐ American Express</td>
</tr>
<tr>
<td>Credit Card #</td>
<td></td>
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<td>Signature</td>
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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 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. Polyolactic 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

Other Studies

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