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World Plastics Processing Machinery

Industry Study with Forecasts for **2017 & 2022**

Study #3093 | November 2013 | \$6100 | 450 pages

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A healthier sales climate, resulting from accelerations in fixed investment spending and growth in the production of plastic goods, will spur gains in world plastics processing machinery demand.

World demand to rise 6.9% annually through 2017

Global plastics processing machinery demand is expected to advance 6.9 percent annually through 2017 to \$37.1 billion. A healthier sales climate, resulting from accelerations in fixed investment spending and growth in the production of plastic goods, will spur gains.

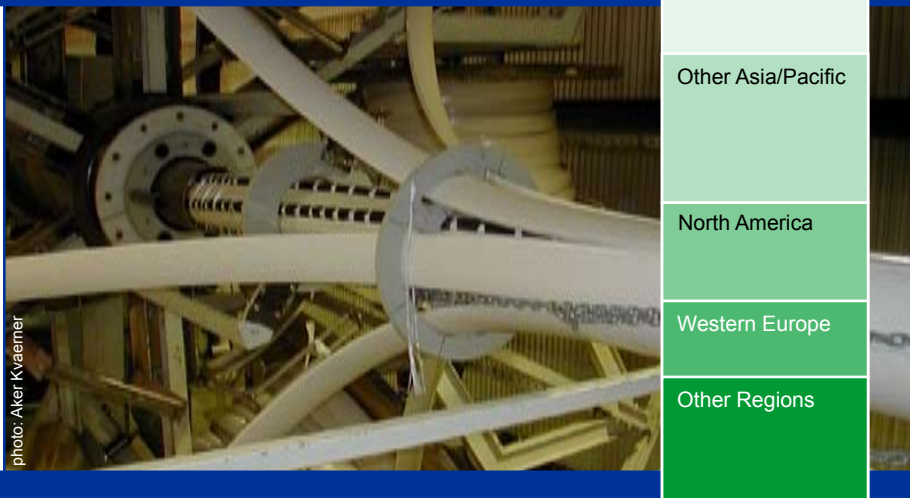
Packaging to be fastest growing application

Equipment utilized in the production of plastic packaging will expand at the fastest pace and climb the most in absolute terms. Increases will be spurred by growth in packaging demand and food and beverage manufacturing activity as living standards continue to rise in developing countries, stimulating greater consumption of packaged goods, particularly of packaged foods and beverages. Additionally, generally improved economic conditions in industrialized nations will lead to even higher packaging demand levels in those countries. As a result, packaging will remain the largest single market for plastics processing machinery, accounting for more than one-third of all 2017 sales, followed in size by consumer/institutional products and construction.

Injection molding equipment to remain top segment

Injection molding equipment will continue to be the most popular product type,

World Plastics Processing Machinery Demand, 2017 (\$37.1 billion)



accounting for nearly two-fifths of 2017 new machinery sales due to its versatility across a wide range of applications. However, demand for 3D plastics printers is expected to grow the fastest of any plastics processing equipment type from a relatively small current market base. 3D printers offer more flexibility in product design than traditional machines and will provide functional competition to injection molding equipment for custom-made parts, as well as in other low output and prototyping applications. In addition, advances in technology and falling product prices will broaden the market for 3D plastics printers. Extrusion machinery sales will climb at the next fastest rate, bolstered by accelerating construction activity.

Developing markets to provide best opportunities

Developing markets will provide the best growth opportunities for suppliers of plastics processing equipment. Sales in Central and South America will climb the most rapidly, led by the large and fast-growing Brazilian market, followed by the Africa/Mideast region, led by Turkey. China is by far the largest national equipment market, accounting for 29 percent of all 2012 sales, and it will continue to lead global demand in 2017. India will be the fastest-growing national market, however, expanding 12 percent per year. Greater demand for plastic products in both China and India will be the primary driver of sales advances.

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Sample Text, Table & Chart

OTHER REGIONS

Turkey: Supply & Demand -- Plastics processing machinery demand in Turkey totaled \$515 million in 2012, representing the largest market in the Africa/Mideast region with 27 percent of all sales. Product purchases in Turkey increased at a 4.2 percent annual rate from 2007 to 2012, outperforming the region as a whole by a consistent margin. Market gains were fueled by users' need to update equipment to become competitive in global plastic product markets. However, decelerations in fixed investment expenditures and plastic resin consumption tempered sales increases during this period.

With 2012 industry shipments of \$140 million, Turkey was the largest producer of plastics processing machinery in the Africa/Mideast region, accounting for 52 percent of all output. Most production in the country consists of commodity-type units and parts, and manufacturing capacity in Turkey remains extremely limited by global supply. However, manufacturers are seeking to upgrade the quality attributes of the equipment they make. Domestic production rose 2 percent annually between 2007 and 2012 due to increased competitiveness by Turkish suppliers in both local and export markets, but output growth did not keep pace with demand. As a result, the nation's trade deficit expanded during that span. Nearly three-quarters of supply for domestic demand in 2012 came from foreign suppliers to Turkey are China and Germany, although Italy exports some machinery from Italy, Austria, and

Plastics processing machinery production facilities in Turkey are expected to advance through 2017. Shipments of \$140 million, accelerating from the 2007-2012 period and outpacing the Africa/Mideast region overall. Healthy domestic market conditions and increased exports to developing nations will benefit Turkish manufacturers. However, foreign multinationals attracted by fast-growing local markets will provide stiff competition, preventing industry shipments

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SAMPLE PAGE

TABLE VII-19

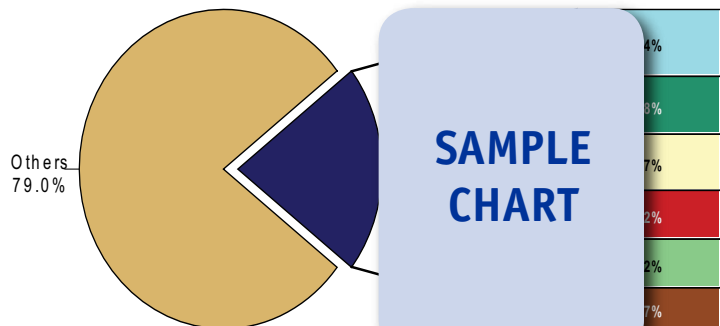
TURKEY: PLASTICS PROCESSING MACHINERY SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2011\$)					
% fixed investment					
Gross Fixed Investment (bil 2011\$)					
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					
% Turkey					
Africa/Mideast Plastics Machinery Shipments					

SAMPLE TABLE

CHART VIII-1

WORLD PLASTICS PROCESSING MACHINERY MARKET SHARE (\$26.6 billion, 2012)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Toyo Machinery & Metal Company Ltd.

523-1 Fukusato, Futami-cho
 Akashi City, Hyogo 674
 Japan
 81-78-94
 http://www

Sales: \$
 Employ

Key Pro disc molding equip-
 ment, an es

Toyo Machinery & Metal is a producer of die-casting machines, plastic injection molding machines, peripheral automation equipment, optical disc molding machines, and related components. The Company is an affiliate of Hitachi Limited (Japan).

The Company participates in the world plastics processing machinery industry through the production of plastic injection molding equipment, optical disc molding machinery, and expanded polystyrene (EPS) molding machines. In FY 2013, injection molding machinery represented \$167 million of Toyo Machinery & Metal's total sales.

Injection molding machinery from the Company comprises fully electric models sold through the SI-V series, ET series, and SI-IVRW series. SI-V series machines, which are suitable for thinwall and high precision molding applications, are equipped with control systems designed to decrease variations at certain production points, while ET series units are compact, vertical die-clamping types offered with vertical or horizontal injection units. Toyo Machinery & Metal's SI-IVRW series injection molding machines, which have high speed rotary tables,

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**SAMPLE
PROFILE**

TABLE VII-20

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

Item	2002	2007	2012	2017	2022
Plastics Processing Machinery Demand	15	15	15	15	15
By Product:					
Injection Molding Machinery					
Extrusion Machinery					
Blow Molding Machinery					
Other Plastics Processing Machinery					
Plastics Machinery Aftermarket Part					
By Primary Application:					
Packaging					
Consumer/Institutional					
Construction					
Other					
% Turkey	2	2	2	2	2
Africa/Mideast Plastics Mach Demand	68	120	120	270	150

**SAMPLE
TABLE**

STUDY COVERAGE

This Freedonia study, **World Plastics Processing Machinery**, offers historical data (2002, 2007, 2012) and forecasts for 2017 and 2022 by machinery type (e.g., injection molding, extrusion, blow molding, 3D plastics printers, thermoforming), primary application (e.g., packaging, consumer/institutional products, construction), world region, and for 30 countries. The study also considers market environment factors, evaluates company market share and profiles 41 industry players,

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OTHER STUDIES

**World 3D Printing
(Additive Manufacturing)**

World demand for 3D printers, materials and software will rise 21 percent yearly to \$5 billion in 2017. North America will remain the largest market while developing regions will grow the fastest. Plastics will continue to lead materials demand but will be outpaced by metals. The medical and dental market will offer some of the best opportunities. This study analyzes the \$2 billion world 3D printing industry, with forecasts for 2017 and 2022 by product, market, world region, and for 14 countries. The study also evaluates company market share and profiles industry players.

#3123December 2013 \$6100

Machine Tools in China

Demand for machine tools in China is forecast to increase 9.2 percent per annum to ¥600 billion in 2017. Both metal cutting and forming machine tools and machine tool accessories will grow at a similarly strong pace. Transportation equipment and electrical/electronic equipment manufacturing will be the fastest growing markets. This study analyzes the ¥386 billion machine tool industry in China, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry participants.

#3090December 2013 \$5300

World Packaging Machinery

Growth in worldwide demand for packaging machinery is expected to climb at a 4.6 percent annual pace through 2017 to \$41.8 billion. Machines used in the packaging of chemicals, pharmaceuticals, and personal care products will post the most rapid gains. The Asia/Pacific region will remain the fastest growing market. This study analyzes the \$33.4 billion world packaging machinery industry, with forecasts for 2017 and 2022 by product, market, world region, and for 31 countries. The study also evaluates company market share and profiles industry players.

#3063September 2013..... \$6200

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950December 2012 \$6100

World Food Processing Machinery

Global sales of food processing machinery are expected to climb 7.3 percent per year to \$53.3 billion in 2016. The Asia/Pacific region will record the fastest demand gains, led by China, India, Indonesia and Thailand. Bakery and pasta machinery will remain the largest segment and post the highest value gains. This study analyzes the \$37.4 billion world food processing machinery industry, with forecasts for 2016 and 2021 by type, world region and for 21 major countries. The study also evaluates company market share and profiles industry participants.

#2931November 2012 \$5900

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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