

IC Market Tracking
Blow Molding Worldwide
2020

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2017 – 2019 for the total market development as well as
 - Machine Types
 - Mold Types
 - Business Segments
- Forecasts from 2020 – 2023 for the total market as well as each analyzed product group, mold type and business segment
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the top players for 2018/19
 - Market Shares on the product groups (Machine Types) and mold types in value and quantity
 - Market Shares per business segments (Application Segments) in value

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, gross fixed investments, labor market, demographics, etc.
- Continuous updates of the data



Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables



ONLINE-COCKPITS

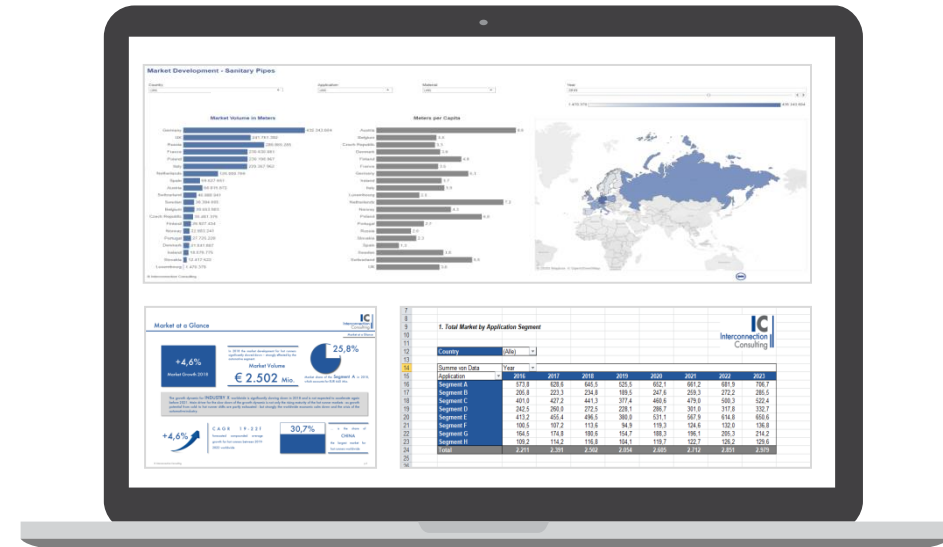
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

EXECUTIVE REPORTS

- PDF report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts

PIVOT-TABLES

- MS-Excel pivot-table including all raw data of the report
 - Market-Forecast pivot table
 - Competition pivot table



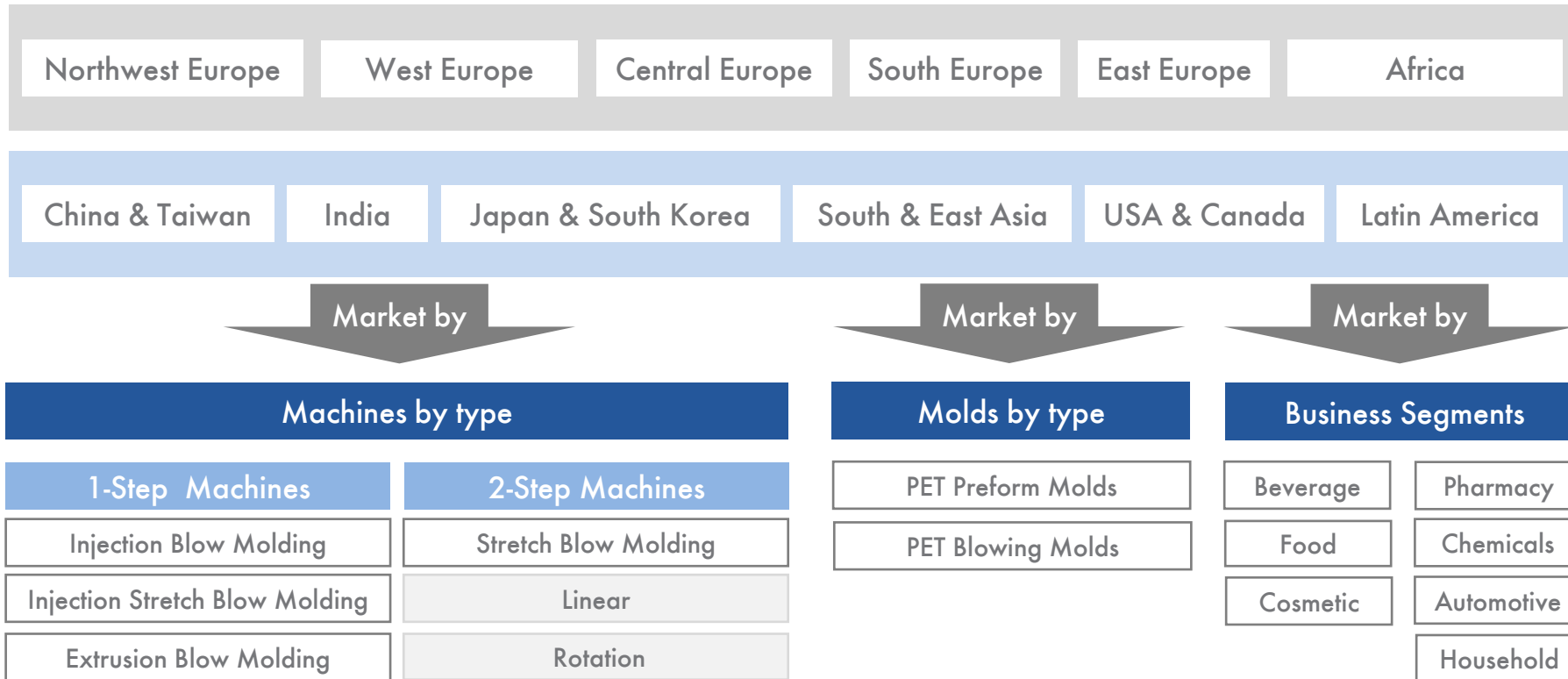
Market Intelligence Tool and Reports



Online Dashboards

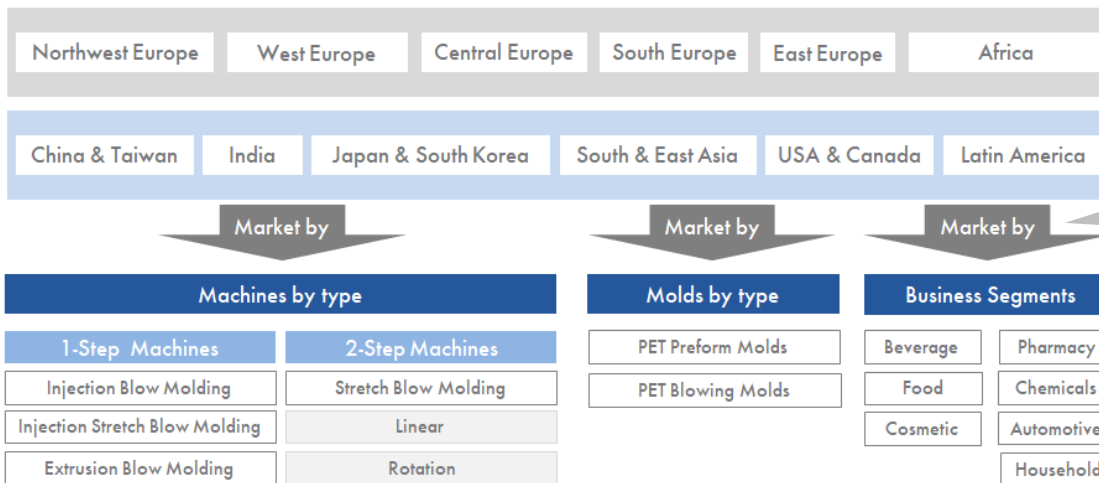
Executive Reports

Pivot Tables



The total market, market shares of the top players for the last two years and forecasts for the next three years are available in the study

Market Structure - Interpretation



- Market data is available for each region separately as well as aggregated for the region package purchased.
- Each region report includes data for the two different machine types (1-Step Machines; 2-Step Machines) separately as well as aggregated for the total market of Blow Molding Machines in terms of value and quantity.
- Each region report includes data for the two different mold types (PET Preform Molds; PET Blowing Molds) separately as well as aggregated for the total market of Blow Molds in terms of value and quantity.

Each product group is further broken down by various segments.

- ⇒ Data for 1-Step Machines includes data by Injection Blow Molding, Injection Stretch Blow Molding and Extrusion Blow Molding.
- ⇒ Data for 2-Step Machines / Stretch Blow Molding Machines includes data by formats as Linear and Rotation
- ⇒ Data for Mold types includes data by PET Preform Molds and PET Blowing Molds
- ⇒ For instance – the report shows how many Extrusion Blow Molding Machines have been sold from 2017-2023. Furthermore, it also shows the sales volume to the beverage segment as well as sales to the six other business segments analyzed.

Machine Types

Injection Blow Molding

This one-machine is following the one step “hot preform” method. The plastic tube is formed by injection and is then positioned in a cooled blow cavity which produces an article of a desired shape.

Injection Stretch Blow Molding

1-step machine for the production of both preform and bottle. The injection modelled preform is withdrawn from the injection cavity while still hot enough to be stretch blown the bottles (for PR,PET and for high capacity containers).

Extrusion Blow Molding

Machine for producing hollow articles like bottles from plastics using extruder, die, clamp unit (press) and mold.

Reheat Stretch Blow Molding Machine

2-step machine for reheating the preforms from cold or hot and for stretch-blow-molding the containers (for PET/PP/PVC or whatever material for rigid plastic containers).

Linear Stretch Blow Molding Machine

The linear machines have the oven and blow section in a line, sometimes a curved one for that. They are primarily used for smaller outputs.

Rotary Stretch Blow Molding Machine

The rotary machines always have the blow cavities on a carousel and might have the ovens in a linear or rotary fashion.



Mold Types

PET Preform Molds

Molds for dedicated production of preforms for blow molding.

PET Blowing Molds

Molds used to give the final form to the containers.



Definition and Demarcation

Regions	
Northwest Europe	UK, Ireland, Norway, Sweden, Finland, Denmark, Island
West Europe	France, Belgium, Netherlands, Luxembourg
Central Europe	Germany, Austria, Switzerland
East Europe	Poland, Hungary, Czech Republic, Slovenia, Slovakia, Baltics, Bulgaria, Russia, Ukraine, CIS
South Europe	Spain, Portugal, Greece, Italy
South & East Asia	including Middle East, Oceania
Latin America	South America and Central America

The Unique Mix of Methods and Approaches for Reliable Market Analysis



SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Survey with Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**
“Only who talks with the industry knows what’s going on!”

The Market Intelligence Tool

Dashboards - The Best Way to Work with Data

A picture says more
than 1000 words

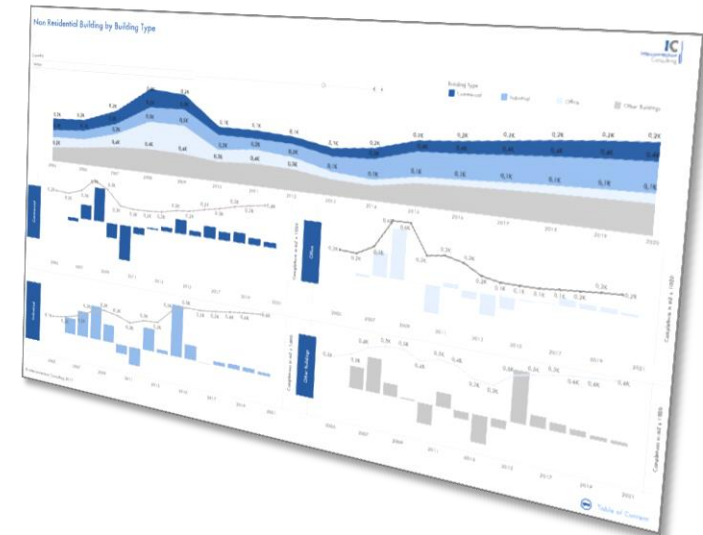
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

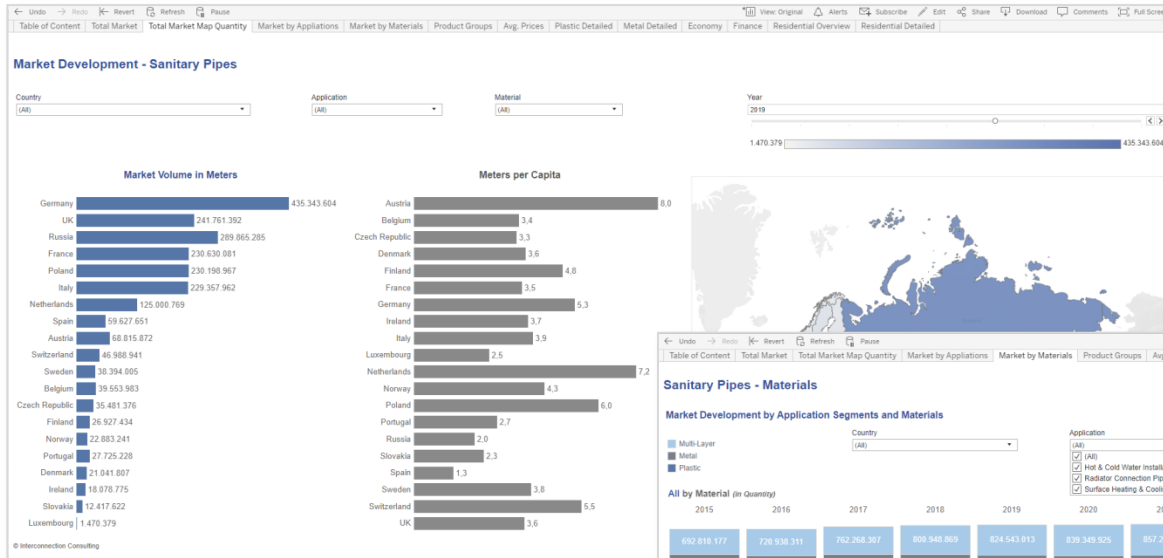
Easy online
accessability

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

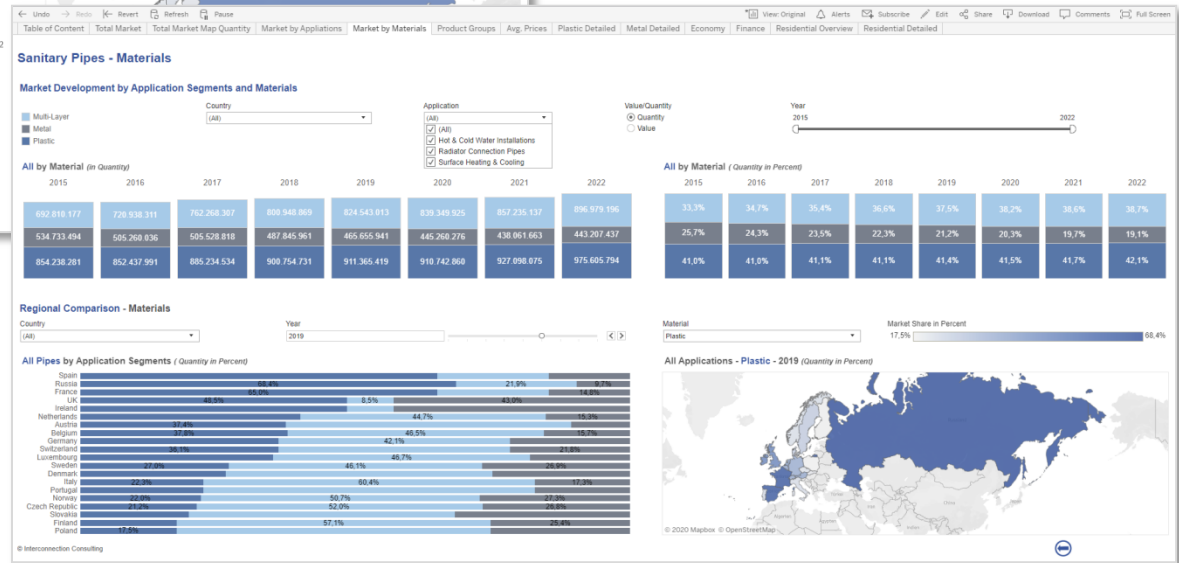


In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs € 500,-.

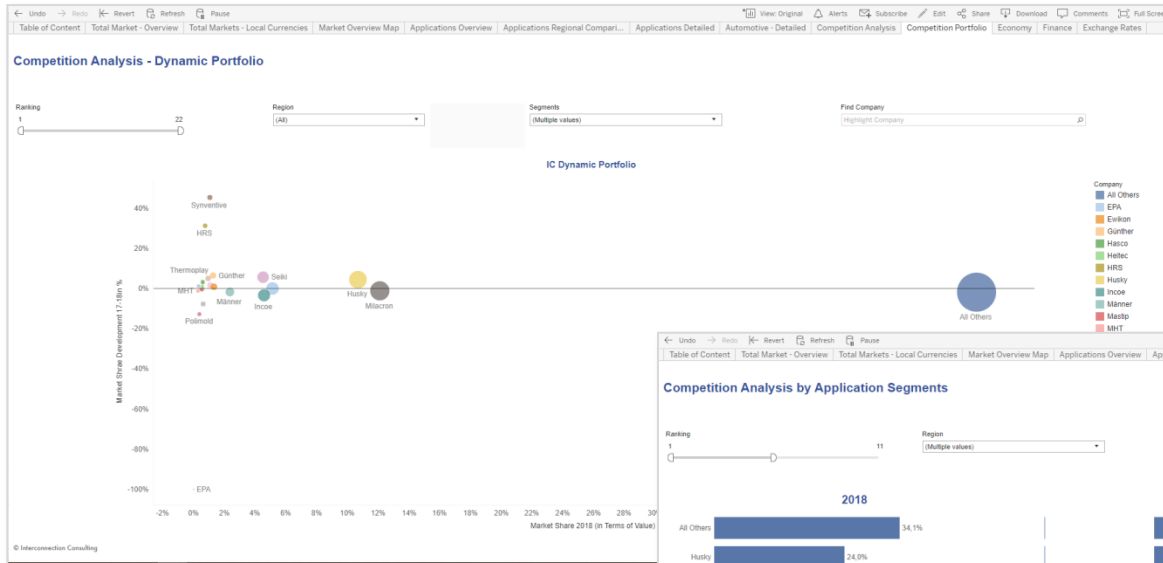
Sample Cockpits for Market Analysis Data



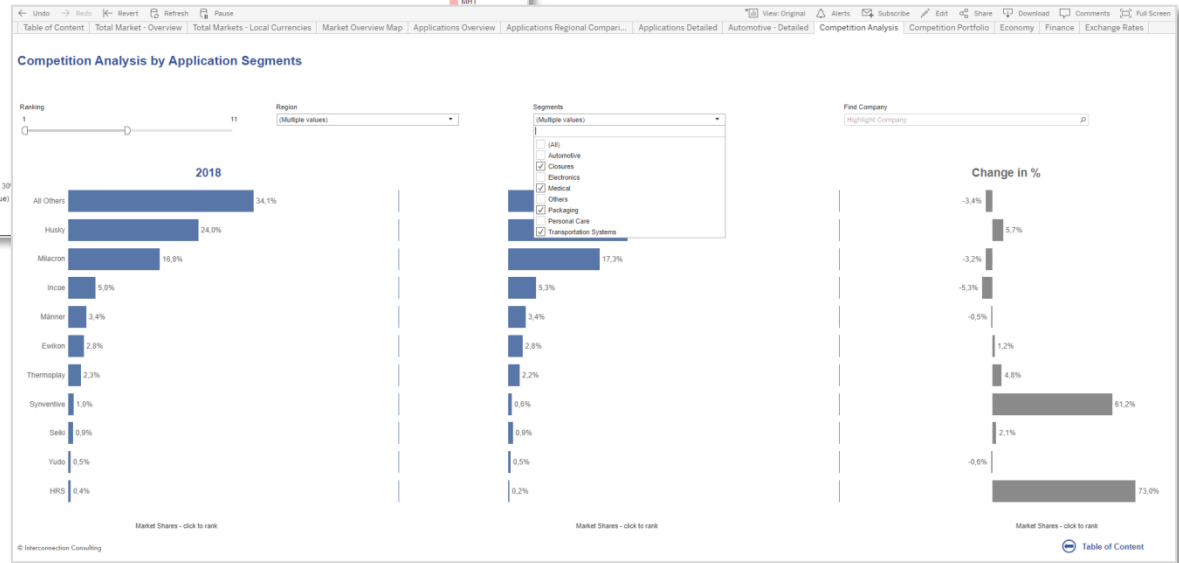
This chart contains fictive data



Sample Cockpits for Competition Data

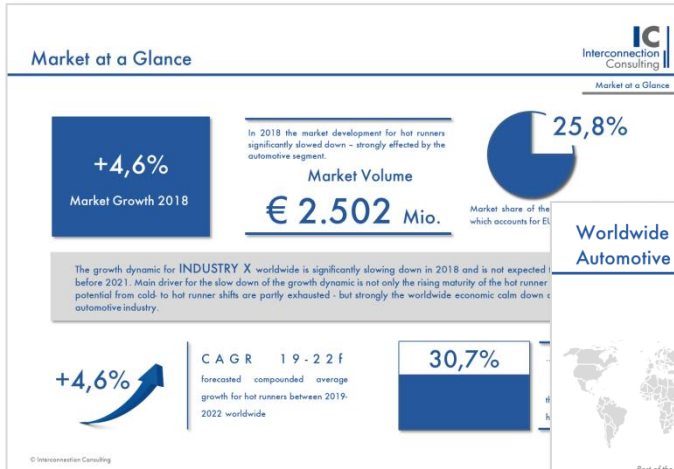


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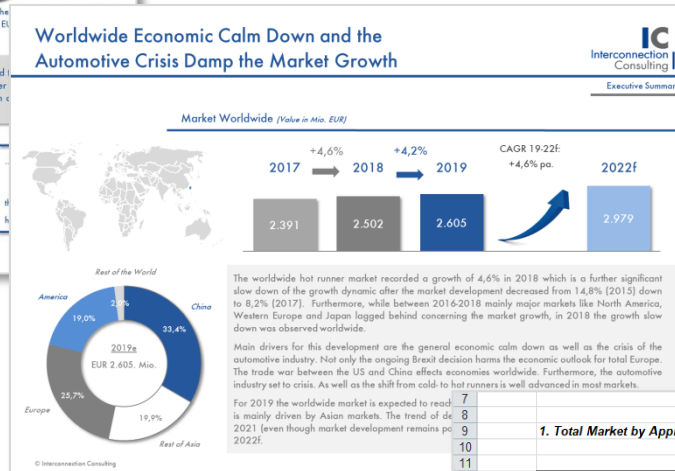


Additional Deliverables

Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (fictive data)

1. Total Market by Application Segment

Country: (Alle)

Application	2016	2017	2018	2019	2020	2021	2022	2023
Segment A	573.8	628.6	645.5	525.5	652.1	661.2	681.9	706.7
Segment B	205.8	223.3	234.8	189.5	247.6	259.3	272.2	285.5
Segment C	401.0	427.2	441.3	377.4	460.6	479.0	500.3	522.4
Segment D	242.5	260.0	272.5	228.1	286.7	301.0	317.8	332.7
Segment E	413.2	455.4	496.5	380.0	531.1	567.9	614.8	650.6
Segment F	100.5	107.2	113.6	94.9	119.3	124.6	132.0	136.8
Segment G	164.5	174.8	180.6	154.7	188.3	196.1	205.3	214.2
Segment H	109.2	114.2	116.8	104.1	119.7	122.7	126.2	129.6
Total	2.211	2.391	2.502	2.054	2.605	2.712	2.851	2.979

Pivot-Table including all raw data as MS-Excel file (fictive data)

Content of the Report

Overview of the Included Dashboards

TOTAL MARKET

- Total Market – Regional Comparison
- Total Market Development by Regions

PRODUCT GROUPS

- Regional Market Development by Machine Types in Terms of Value and Quantity (in absolute figures and percent)
- Regional Market Development of Machine Types - detailed (Value/Quantity and Change YoY, Average Price and Change YoY)
- Regional Market Development by Mold Types in Terms of Value and Quantity (in absolute figures and percent)
- Regional Market Development of Mold Types - detailed (Value/Quantity and Change YoY, Average Price and Change YoY)

BUSINESS SEGMENTS

- Regional Market Development by Business Segments in Terms of Value (in absolute figures and percent)

COMPETITION ANALYSIS

- Market Shares by Machine Types and Regions in Terms of Value and Quantity
- IC Dynamic Portfolio by Machine Types (BCG Matrix)
- Market Shares by Mold Types and Regions in Terms of Value and Quantity
- IC Dynamic Portfolio by Mold Types (BCG Matrix)
- Market Shares by Business Segments and Regions in Terms of Value

MARKET DRIVERS

- Economic Indicators (Real GDP Change, Personal Disposable Income, Recorded Unemployment...)
- Financial Indicators (Government Budget Balance, Gross Fixed Investments, Inflation)

Investment Plan for Your Market Research

	Subscription *	Single Issue	Scale of Discounts	
Total **	€ 9,990	<i>+25% for Single Issues</i>	€ 5.000,-	10%
Single Region	€ 2,950		€ 10.000,-	25%
			€ 15.000,-	30%
			€ 20.000,-	35%

- | | | | | | |
|------------------|-------------|---------------------|-------------------|--------------|---------------|
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** Package Price taking the scale of discounts already into account.

Price includes an interactive PDF Document. All prices shown exclude sales tax.

Selected References of Our Plastic Machinery Reports

„IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



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Our Market-Intelligence Tools



If there are any questions please
do not hesitate to contact us!

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