IC

Interconnection
Consulting

IC Market Tracking
Injection Molding
Machines Worldwide
2018

www.interconnectionconsulting.com

# Your Benefits at a Glance

✓ Overview of the development of the **total market** and the **individual Segments**.

✓ **Market Forecasts** for all product segments and regions for the upcoming three years

✓ Awareness of **Market Position** and development during the last two years, in comp
respect to:
- Total Market
- Product Groups:
  - by Clamping Force
  - by Type (Hydraulic, Electric, Hybrid)

- Application Fields (Automotive, Medical, Packaging, Electronics, Others)
- Regional Markets
- Automation

✓ Information about the most important **Factors of Influence**

✓ Graphic Presentation of the results facilitates the development of your own strategie

Injection Molding Machines Worldwide

Northern Europe	Central Europe	Southern Europe	Eastern Europe	France & Benelux	Rest of the World
USA & Canada	Latin America	China & Taiwan	India	Japan	South Korea
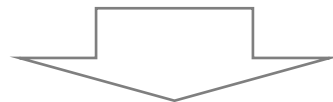
Clamping Force	Type	Product Group	Application	Automation
0-1.000 kN	Hydraulic	Ceramics	Automotive	Automated
1.001-5.000 kN	Electric	Rubber	Medical	Non-Automated
>5.000 kN	Hybrid	Metal	Packaging	
		Plastics	Electronic	
			Others	

For each segment the total market and market shares of the top players for the last two years and forecasts for the next three years are available in the study

Definition and Demarcation

Clamping Force	Turnover is stated in 1.000 Euro. Values are always Net-Turnovers (No List-Prices), discounts included
0 – 1.000 kN	Machines with a Clamping Force less or equal 1.000 kilo Newton
1.001 – 5.000 kN	Machines with a Clamping Force from 1.001 to 5.000 kilo Newton
>5.000 kN	Machines with a Clamping Force bigger than 5.000 kilo Newton

Type	
Hydraulic	Machines with a hydraulic driving system
Electric	Machines with an electric driving system
Hybrid	Machines with a hybrid driving system

Definition and Demarcation

Application

Automotive

Machines sold to the automotive industry for producing interior, exterior, under-hood and fueling system applications

Medical

Machines producing medical molded parts, e.g. syringes & caps, pipettes, needle plungers, surgical devices, IV accessories

Packaging

Machines producing any kind of packaging like food storage containers, cosmetics and pharmaceutical packaging, bottle caps

Other

Machines used for other applications like for example electronics, telecommunication equipment, construction, households products (e.g. fridge trays, vacuum casing, water jugs, toys, CD cases)

Automation

Automated

Non-Automated

Definition and Demarcation

| Regions	
Northern Europe	Norway, Sweden, Finland, Denmark, UK, Ireland
Southern Europe	Spain, Portugal, Greece, Italy
Eastern Europe	Poland, Hungary, Czech Republic, Slovenia, Slovakia, Latvia, Estonia, Lithuania, Belarus, Ukraine
Central Europe	Austria, Germany, Switzerland
France & Benelux	France, Belgium, Netherlands, Luxembourg
Rest of the World	Turkey, Africa, Middle East, Australia, etc.
Latin America	North, South and Central America , without USA & Canada

What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

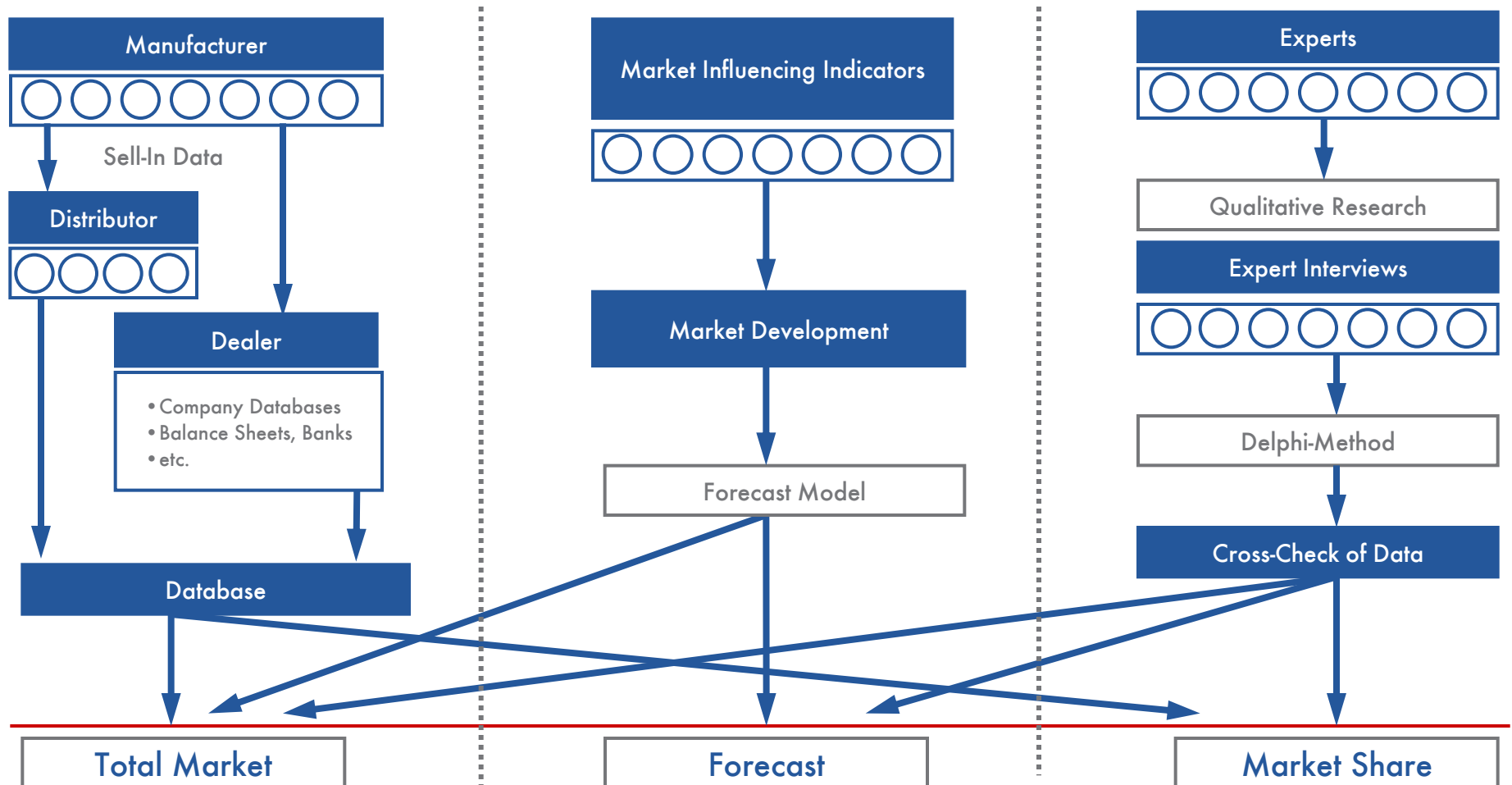Sales are segmented by the first distribution partner.
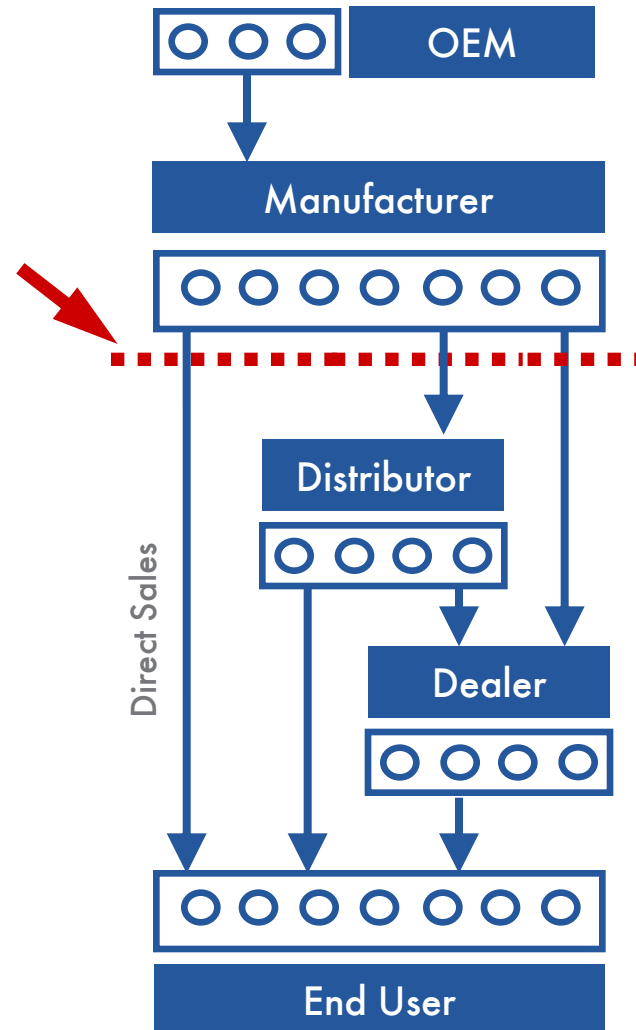
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.
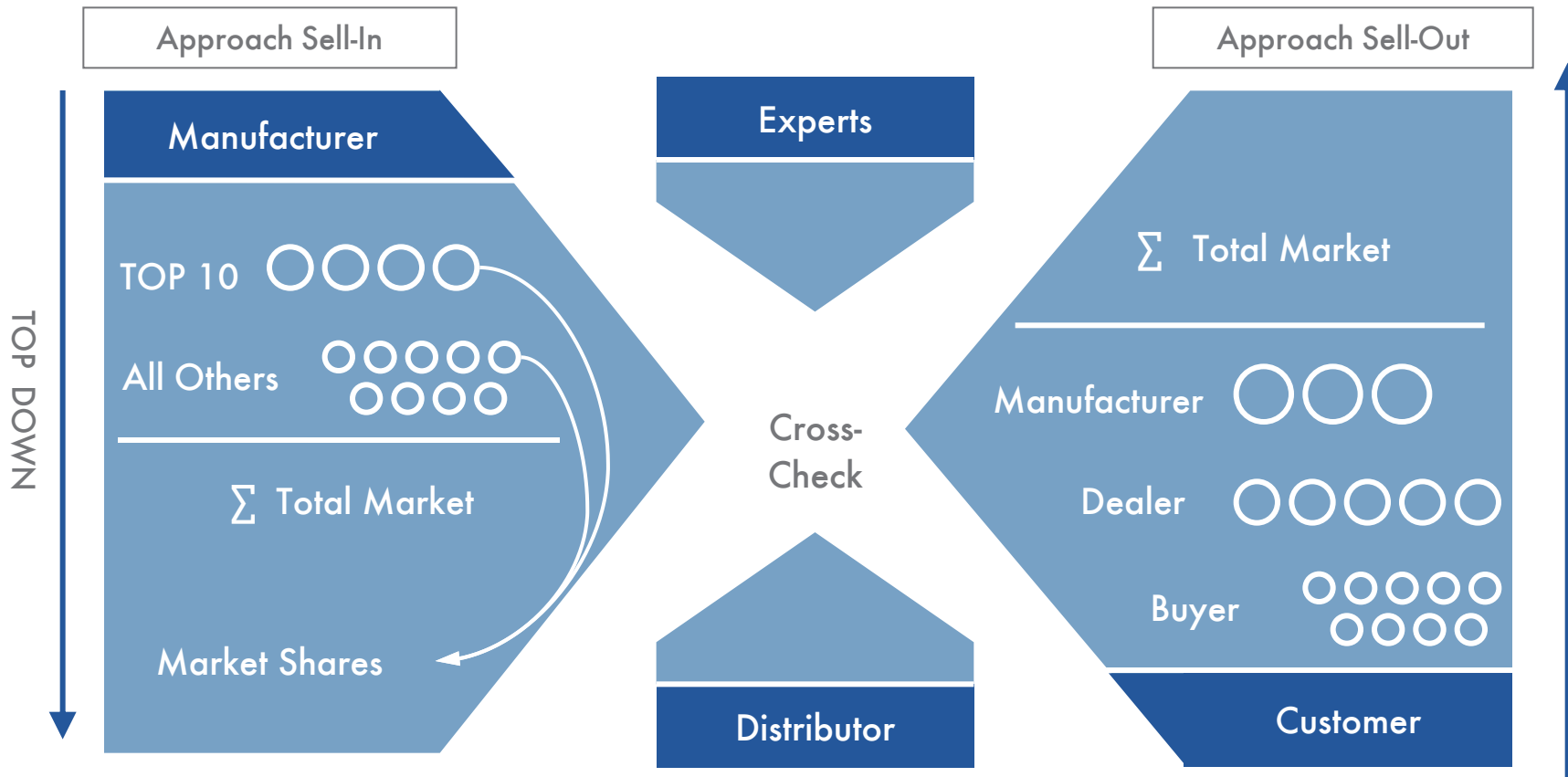
OEM

Manufacturer

Direct Sales

Distributor

Dealer

End User

How Do We Conduct Our Research?

How Do we Cross Check the Data?

Description Structure of Survey Methodology
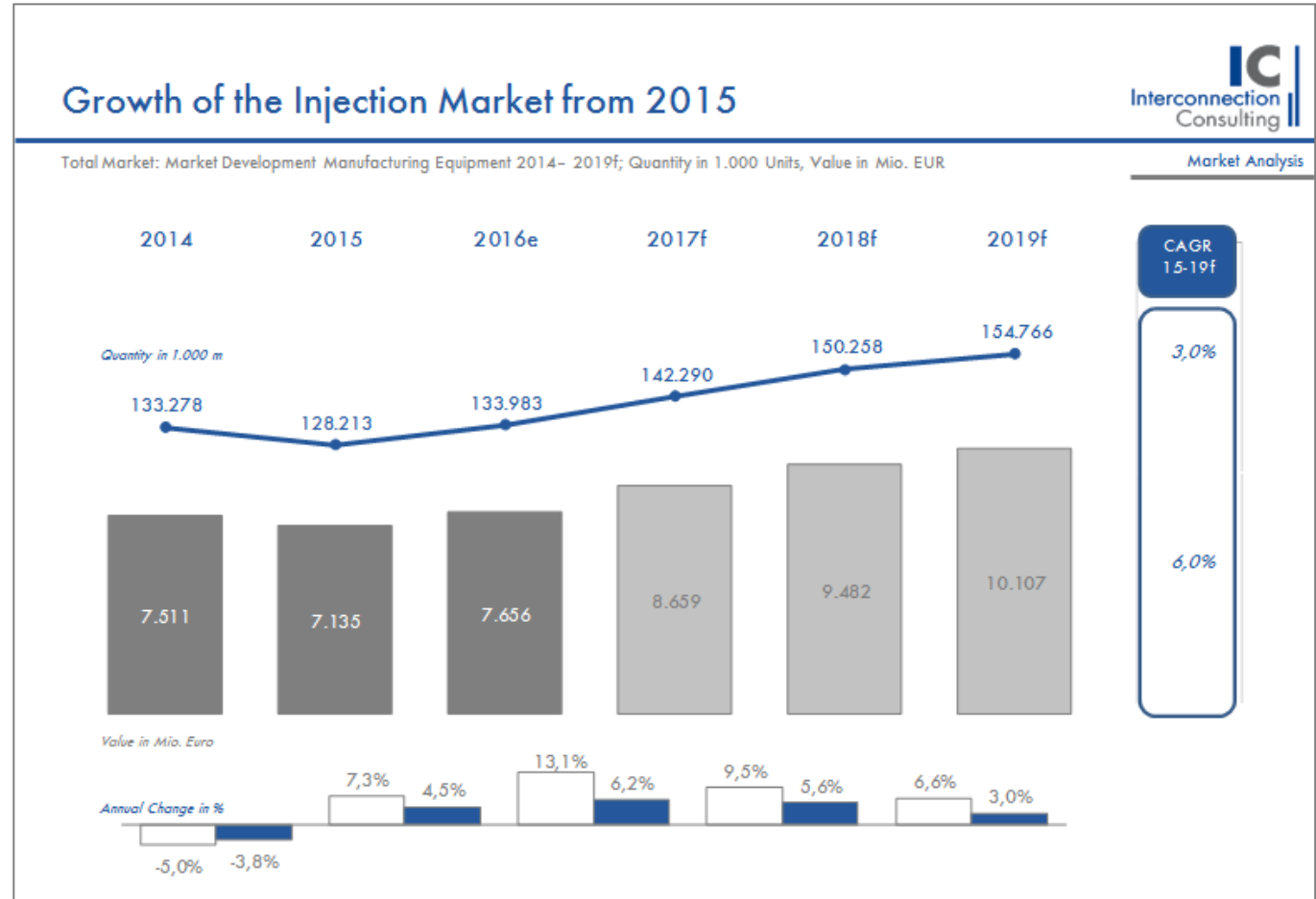
Content of the Report

The IC Market Tracking® is modularly built and consists of the following sections:

- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.

- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.

- As an introduction key factors influencing the market are analysed in the **Economic Environment**: You will find the most important data on consumer behaviour, main economic indicators, etc.

- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.

- The **Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.

Content of the Report

What Is the Total Market Development?

■ Overview of the total Market until the current year and Forecast for the upcoming three years.

■ *This chart shows dummy figures.*

Growth of the Injection Market from 2015

Total Market: Market Development Manufacturing Equipment 2014– 2019f; Quantity in 1.000 Units, Value in Mio. EUR

	2014	2015	2016e	2017f	2018f	2019f
Quantity in 1.000 m	133.278	128.213	133.983	142.290	150.258	154.766
Value in Mio. Euro	7.511	7.135	7.656	8.659	9.482	10.107

Market Analysis

CAGR 15-19f

3,0%

6,0%

Annual Change in %: -5,0% -3,8% 7,3% 4,5% 13,1% 6,2% 9,5% 5,6% 6,6% 3,0%

Which Product Groups Will Be Profitable?
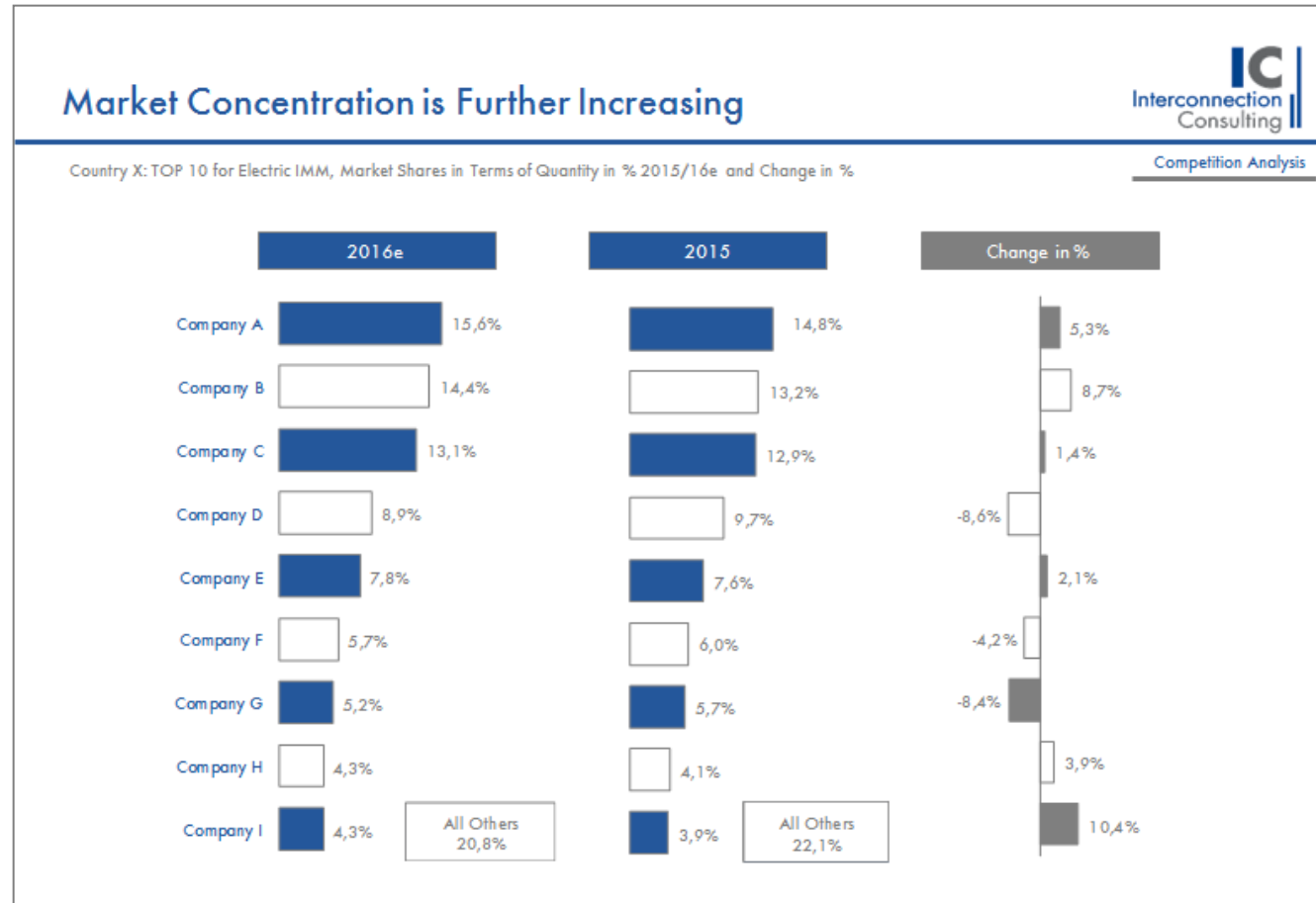
■ Overview of the Product Group Segmentation, Application Types, Distribution Channels.

■ *This chart shows dummy figures.*

75,8% of all IMM Sold were Automated in 2015

Market Analysis

Region X : IMM by Automation. Market Development 2012-2018f; Quantity in %

	2012	2013	2014	2015	2016e	2017f	2018f	Avg. Share 14-18f
Automated	20,5%	21,1%	23,0%	24,2%	25,8%	26,5%	27,1%	25,3%
Non - Automated	79,5%	78,9%	77,0%	75,8%	74,2%	73,5%	72,9%	74,7%

Competition Analysis and Market Shares
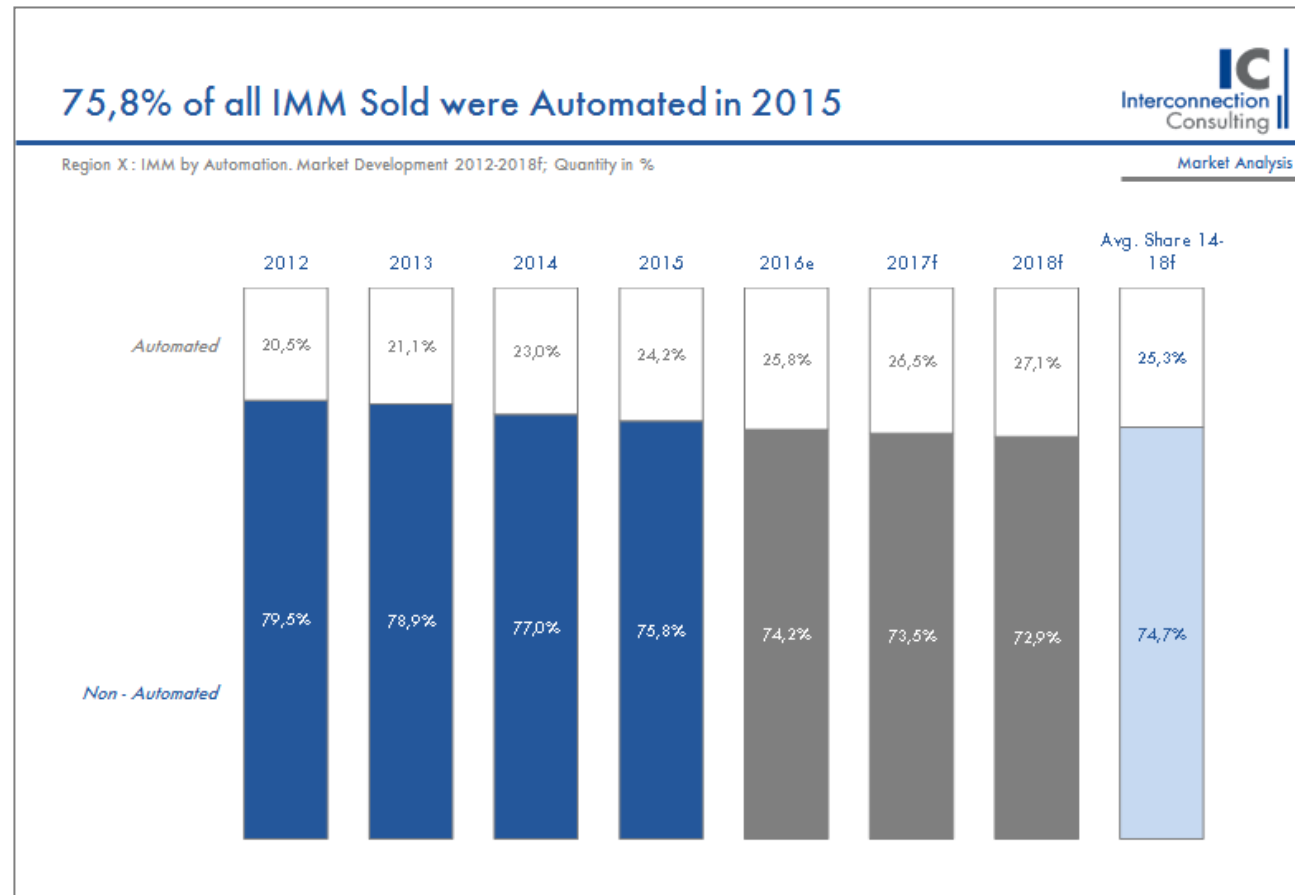
- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.

- *This chart shows dummy figures.*

Market Concentration is Further Increasing

Competition Analysis

Country X: TOP 10 for Electric IMM, Market Shares in Terms of Quantity in % 2015/16e and Change in %

	2016e	2015	Change in %
Company A	15,6%	14,8%	5,3%
Company B	14,4%	13,2%	8,7%
Company C	13,1%	12,9%	1,4%
Company D	8,9%	9,7%	-8,6%
Company E	7,8%	7,6%	2,1%
Company F	5,7%	6,0%	-4,2%
Company G	5,2%	5,7%	-8,4%
Company H	4,3%	4,1%	3,9%
Company I	4,3%	3,9%	10,4%
All Others	20,8%	22,1%	

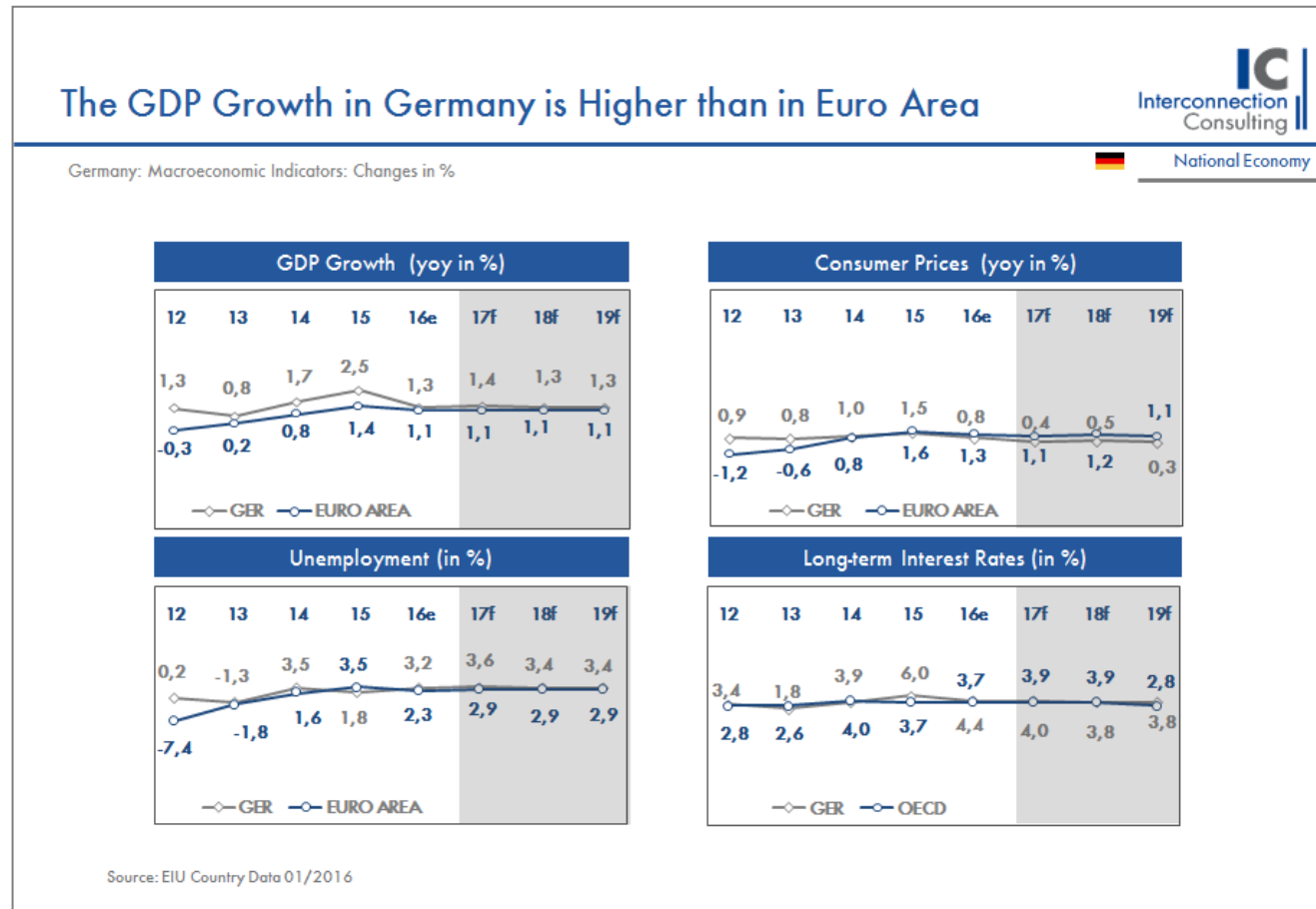# Analysis of the Market Drivers

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.

- *This chart shows sample figures.*

Consumer Prices Reach the Bottom, Stable GDP Growth

General Economy: GDP Growth, Unemployment, Consumer Prices, 2015

Market Drivers

GDP Growth: +2,3%
Consumer Prices: +1,5%
Unemployment: 6,8%

GDP Growth: +2,3%
Consumer Prices: +1,5%
Unemployment: 6,8%

GDP Growth: +2,3%
Consumer Prices: +1,5%
Unemployment: 6,8%

Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.

- *This chart shows sample figures.*

The GDP Growth in Germany is Higher than in Euro Area

Germany: Macroeconomic Indicators: Changes in %

National Economy

GDP Growth (yoy in %)

12	13	14	15	16e	17f	18f	19f
1,3	0,8	1,7	2,5	1,3	1,4	1,3	1,3
-0,3	0,2	0,8	1,4	1,1	1,1	1,1	1,1

—GER —EURO AREA

Consumer Prices (yoy in %)

12	13	14	15	16e	17f	18f	19f
0,9	0,8	1,0	1,5	0,8	0,4	0,5	1,1
-1,2	-0,6	0,8	1,6	1,3	1,1	1,2	0,3

—GER —EURO AREA

Unemployment (in %)

12	13	14	15	16e	17f	18f	19f
0,2	-1,3	3,5	3,5	3,2	3,6	3,4	3,4
-7,4	-1,8	1,6	1,8	2,3	2,9	2,9	2,9

—GER —EURO AREA

Long-term Interest Rates (in %)

12	13	14	15	16e	17f	18f	19f
3,4	1,8	3,9	6,0	3,7	3,9	3,9	2,8
2,8	2,6	4,0	3,7	4,4	4,0	3,8	3,8

—GER —OECD

Source: EIU Country Data 01/2016

Pivot Table

- In addition to the visualized report a Pivot Table will be included.

- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.

- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
Ø Price in € (Classes)	(All)

Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)	
Quarter	4	
Quantity/Value	Quantity	
Weight Classes	(All)	
Country	Germany	
Brand	(All)	
Ø Price in € (Classes)	(All)	

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

Investment Plan for Your Market Research

	Single Issue	IC Subscription*	Scale of Discounts
Worldwide**	€ 10.888,-		€ 5.000 -20%
Europe Total **	€ 4.950,-	IC SUBSCRIPTION 20 % PRICE ADVANTAGE	€ 9.500 -30%
Single Region	€ 2.950,-		€ 12.000 -35%

Available Regions

Northern Europe	Central Europe	Southern Europe	Eastern Europe	France & Benelux	Rest of the World
USA & Canada	Latin America	China & Taiwan	India	Japan	South Korea

* **IC Subscription**: 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

**Price taking into account the scale of discount
Price includes an interactive PDF Document. All prices shown exclude sales tax

Your Advantages as a Subscription Customer

Please choose between Subscription* or Single issue

(•) **Subscription***   ( ) **Single Issue**

As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**

- **Annually updated reports** on fixed dates

- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)

- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research

- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request

- **Easy termination**: After 2 issues each subscription can be terminated easily

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the plastic processing industry.

- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.

- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.

- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.

- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.

Our Market-Intelligence Tools

Market Analysis

Market Volume

Market Shares & Entry

Competition Analysis

Distribution Analysis

Channel Map

Distribution Matrix

Margins

Customer Insight

Focus Groups

Buying Motives

Customer Benefits

Market Forecasts

Indicator Models

Life Cycle Models

Econometric Analysis

Brand Analysis

Brand Scorecards

Brand - Triangle

Brand Affinity

Customer Satisfaction

Importance/Satisfaction Portfolios

Customer Loyalty

Customer Typology

Price Research

Price-Sales-Function

Price-Simulation-Tool

Optimal Pricing

Webverstärker

E Commerce Insights

Search Engine Marketing

Web Channel Analysis

Chosen References

„...... *Mold-Masters subscribes to the Interconnection Consulting Annual Hot Runner Report and refers to the report for various internal business initiatives. ...."*

Mr. Michael Ellis, Director Sales Support and Marketing, Moldmasters

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

Interconnection Consulting

Getreidemarkt 1, A-1060 Wien

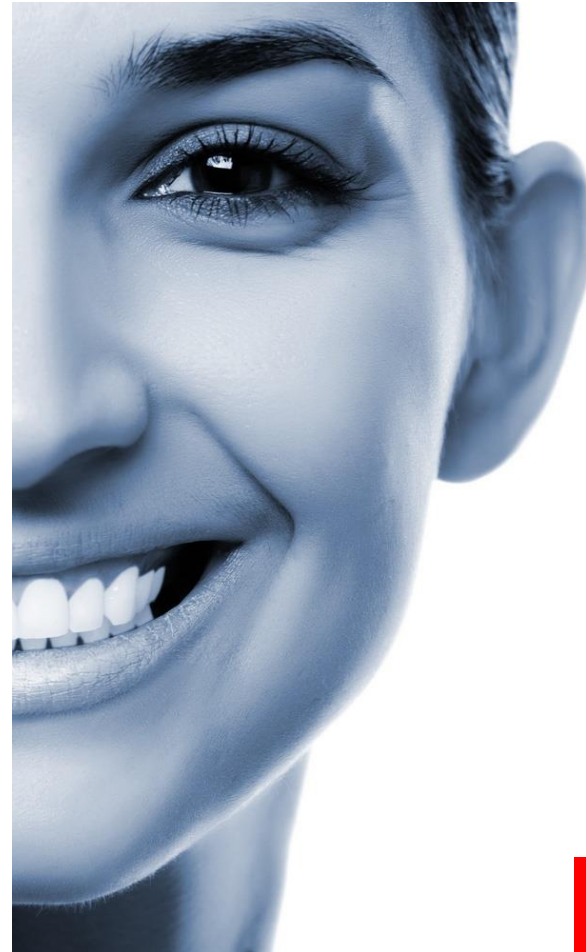Mag. Ernst Rumpeltes – Markt Analystin

Tel: +43 1 5854623 -38

Fax: +43 1 5854623 -30

rumpeltes@interconnectionconsulting.com

Interconnection Consulting

Vienna • Bratislava • Lviv • Buenos Aires • Oberstdorf

www.interconnectionconsulting.com

Inquiry

Factsheet: Injection Molding Machines Worldwide 2018

Interconnection Consulting

Included in the Report
- interactive PDF, Pivot Tables
- Pages (approx.) 500
- Optional: Hard Cover

Price
- per region: 2.950 €
- Total Europe: 4.950 €
- Worldwide: 10.888 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.

Options of ordering – Fax:+43 1 5854623 30
- Click „Buy Now" on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the "Full Details" document and fill in your data.

Content of the Market Report

Structure of the Study

Language of the report
English

Introduction, Market Structure & Executive Summary
Definition and demarcation of product groups, regions and methodology; summary of study results

Market Drivers
Key economic factors influencing the market: consumer behaviour, main economic indicators etc.
Import & export statistics

Total Market Analysis
Total market development and forecasts for all market segments in quantity and value by regions, product groups, driving system types and application fields and automation.

Competition Analysis
Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Regions:
Northern Europe, Central Europe, Southern Europe, Eastern Europe, France & Benelux, USA & Canada, Latin America, China & Taiwan, India, Japan, South Korea, Rest of the World

Clamping Force
0 -1.000 kN, 1.001-5.000 kN, >5.000 kN

Product Types
Hydraulic, Electric, Hybrid

Application Fields
Automotive, Medical, Packaging, Electronic, Others

Automation
Automated, Non-Automated

Product Groups
Ceramics, Rubber, Metal, Plastics

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analysed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.