

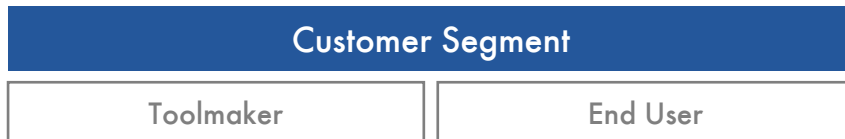
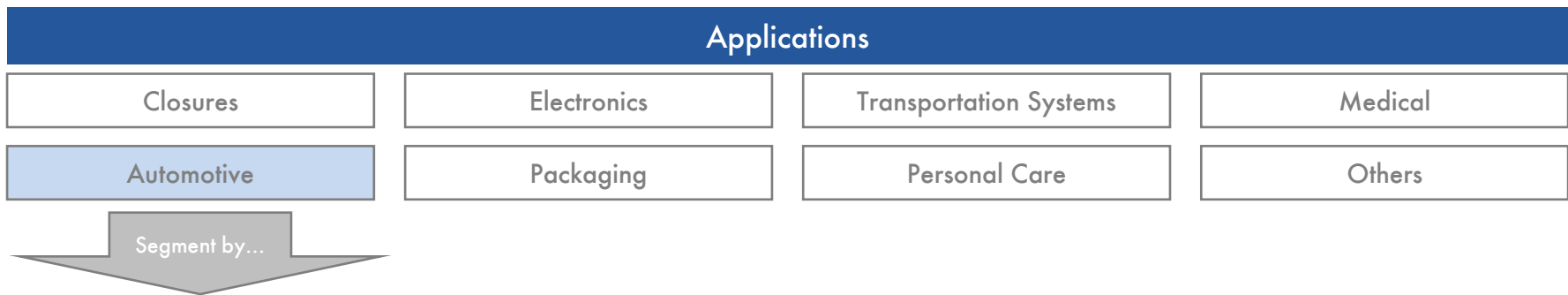
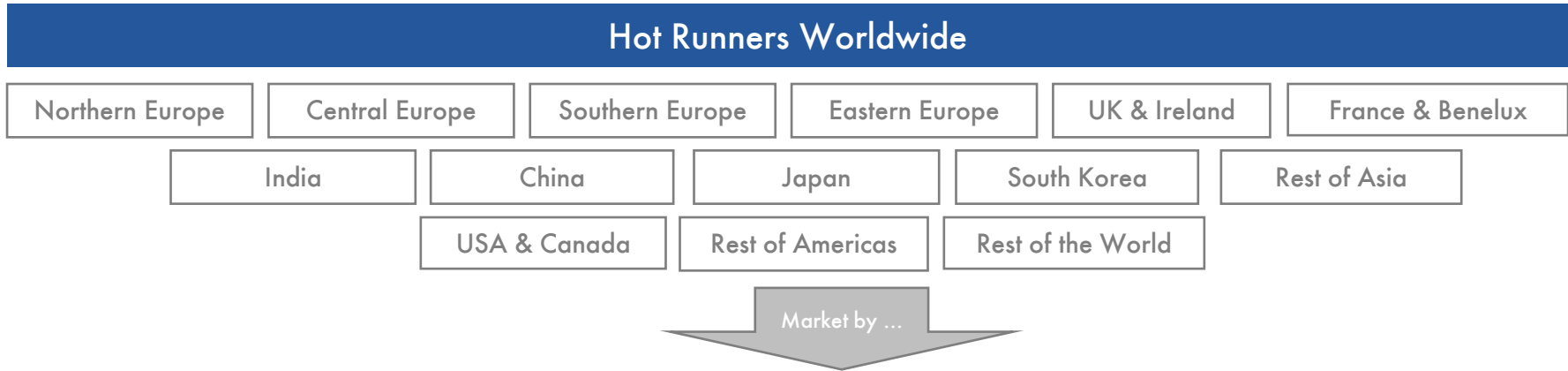
IC Market Tracking
Hot Runners Worldwide
2018

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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, based on our econometric models.
- ✓ Awareness of **Market Position** and development during the last two years, in comparison with major competitors and with respect to:
 - Total Market
 - Regional Markets
 - Application Segments
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphical representation of the results to facilitate the development of your own strategies.





For each segment the value of the total market (including forecasts for the next three years) as well as the market shares of the top players are represented in the study

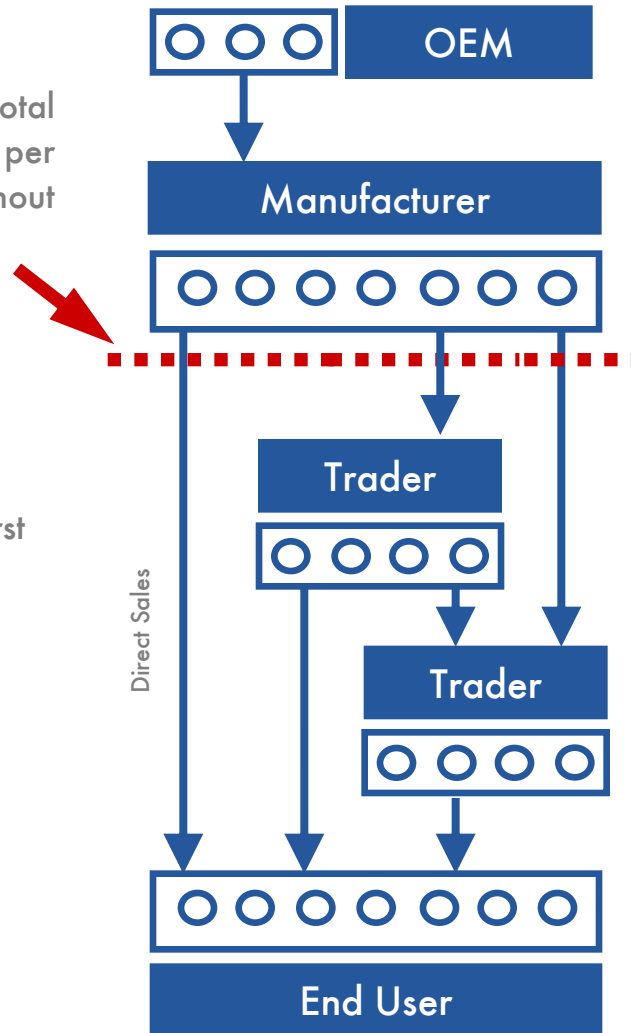
Applications	Turnover is stated in 1.000 Euro. Values are always Net-Turnovers (No List-Prices), discounts included
Medical	Syringes & Caps / Pipettes / Needle Plungers / Surgical Devices / IV Accessories
Automotive	Headlights / Break lights / Reflectors / Turn Signals / Fog Lights / Climate Knobs / Clips & Fasteners / Door Handles / Buttons / Battery Covers
Packaging	Food Storage Containers / Cosmetic Bottles / Pharmaceutical Drug Packaging / Trigger Sprayer Items
Consumer Goods	Razor Heads & Bodies / Toothbrushes / Mouthpieces / Cosmetic Containers / Tampon Applicators / Deodorant Cases / Lint Trap Doors / Laundry Doors / Fridge Trays / Vacuum Casing / Appliance Handles / Water Jugs / Storage Bins / Toys / CD Cases / Buckets / Coat Hangers
Transportation Systems	All Types of Cases & Boxes
Electronics	Video Game Console Parts / Printer Cartridges / Scanner & Printer Bases / Computer Keys / Mouse / Housing / Front Panels / Battery Covers / Back Covers / Buttons
Closures	Soft Drink Caps / Water Caps / Shampoo Lids / Toothpaste Caps / Flip Top Caps
Others	Gears / Mechanical Clips / Calculator Casings / Dropper Parts / TV Casings

Definition and Demarcation

Regions		
US & Canada	Northern Europe	Norway, Sweden, Finland, Denmark, Iceland
India	Central Europe	Austria, Germany, Switzerland
China	UK & Ireland	England, Scotland, Wales, Ireland
Japan	France & Benelux	France, Belgium, Netherland, Luxembourg
South Korea	Southern Europe	Spain, Portugal, Greece, Italy
	Eastern Europe	Poland, Hungary, Czech Republic, Slovenia, Slovakia, Baltic Countries, Balkan Countries, Belarus, Russia, Ukraine, excluding Turkey
	Rest of Asia	Asia excl. India, China, Japan & South Korea, incl. Turkey
	Rest of Americas	North and South America excl. USA & Canada

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

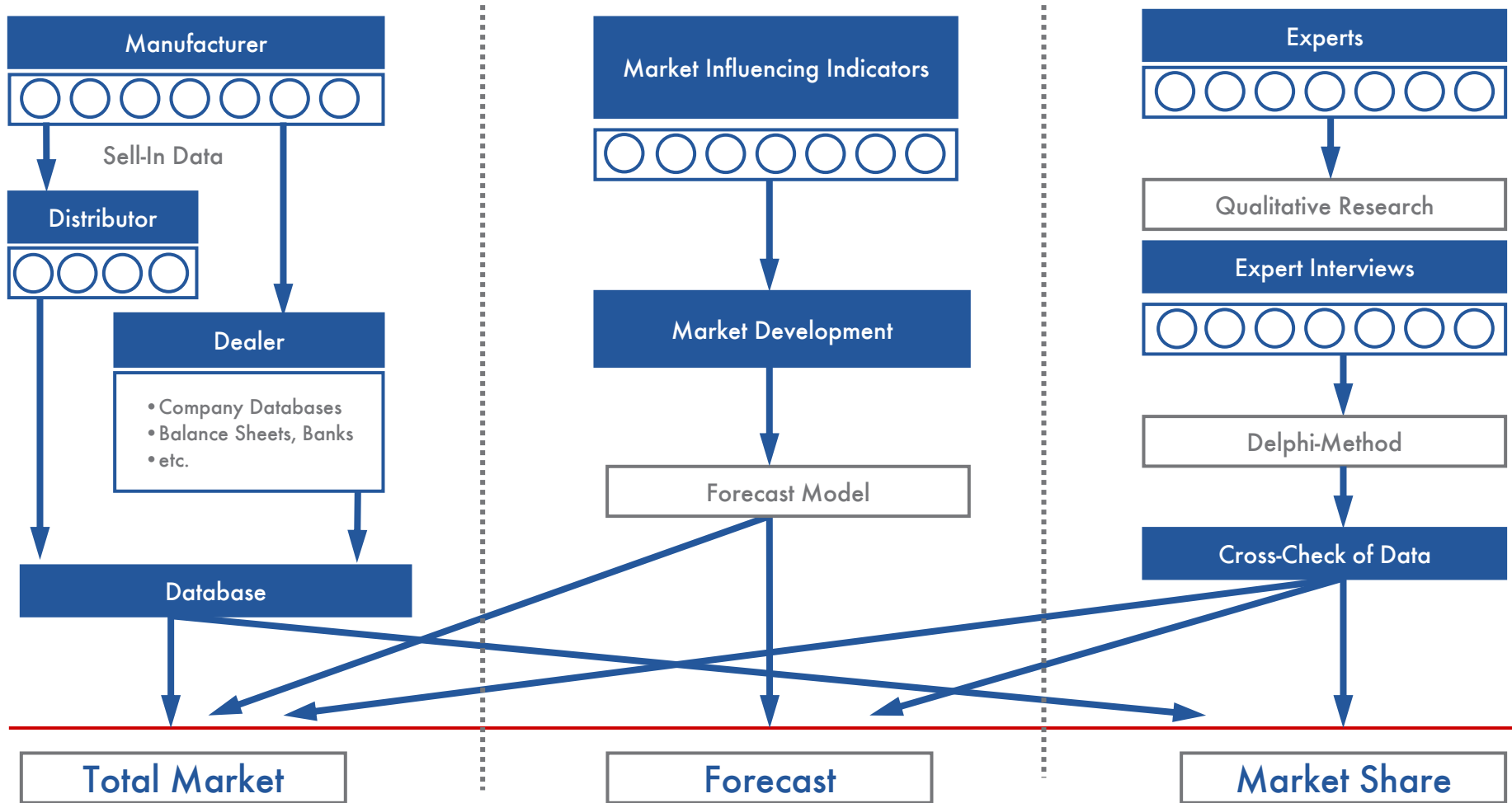
Sales are segmented by the first distribution partner.



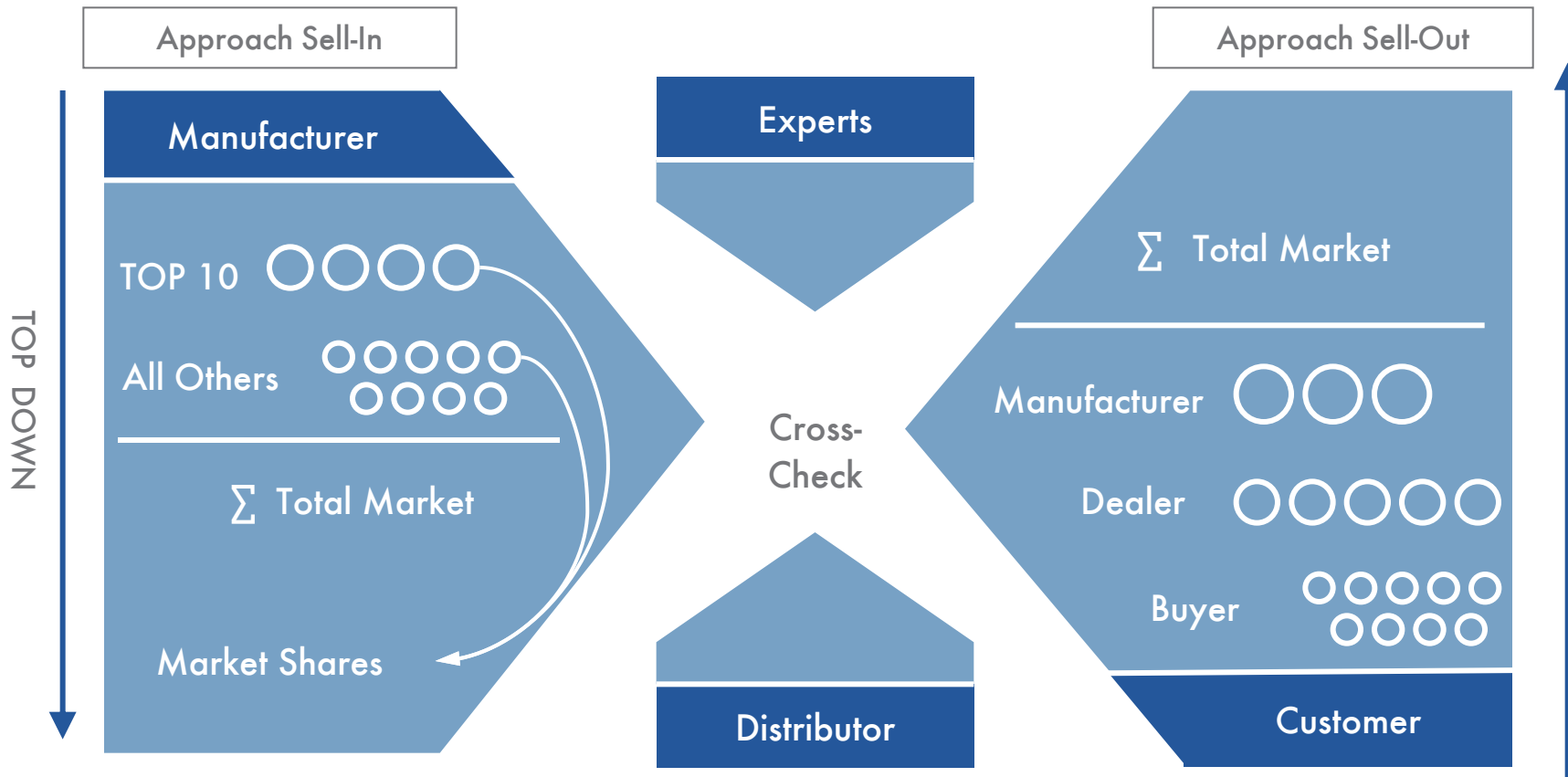
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

Base of Primary Research by Manufacturers & Experts



Data of Manufacturers Aligned with Market Calculation

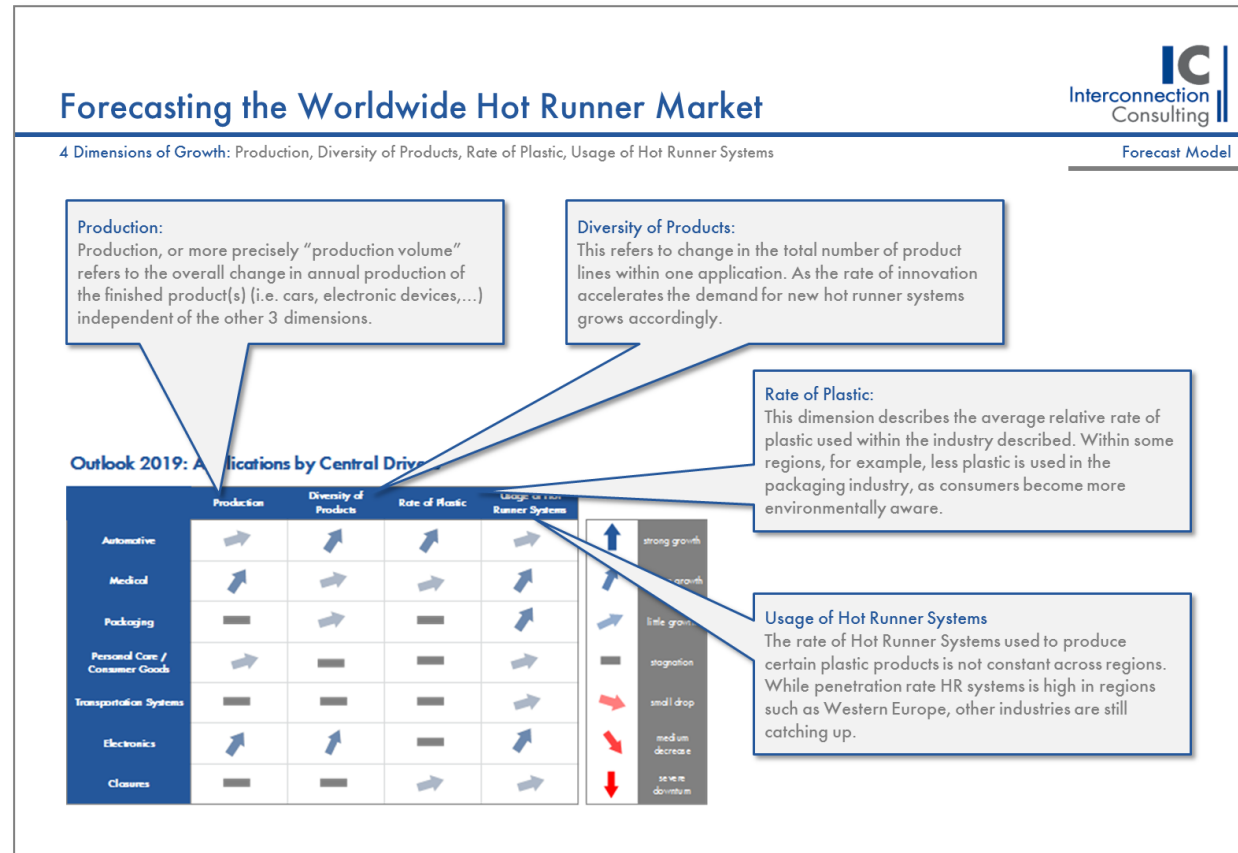


Contents of the IC Market-Tracking®

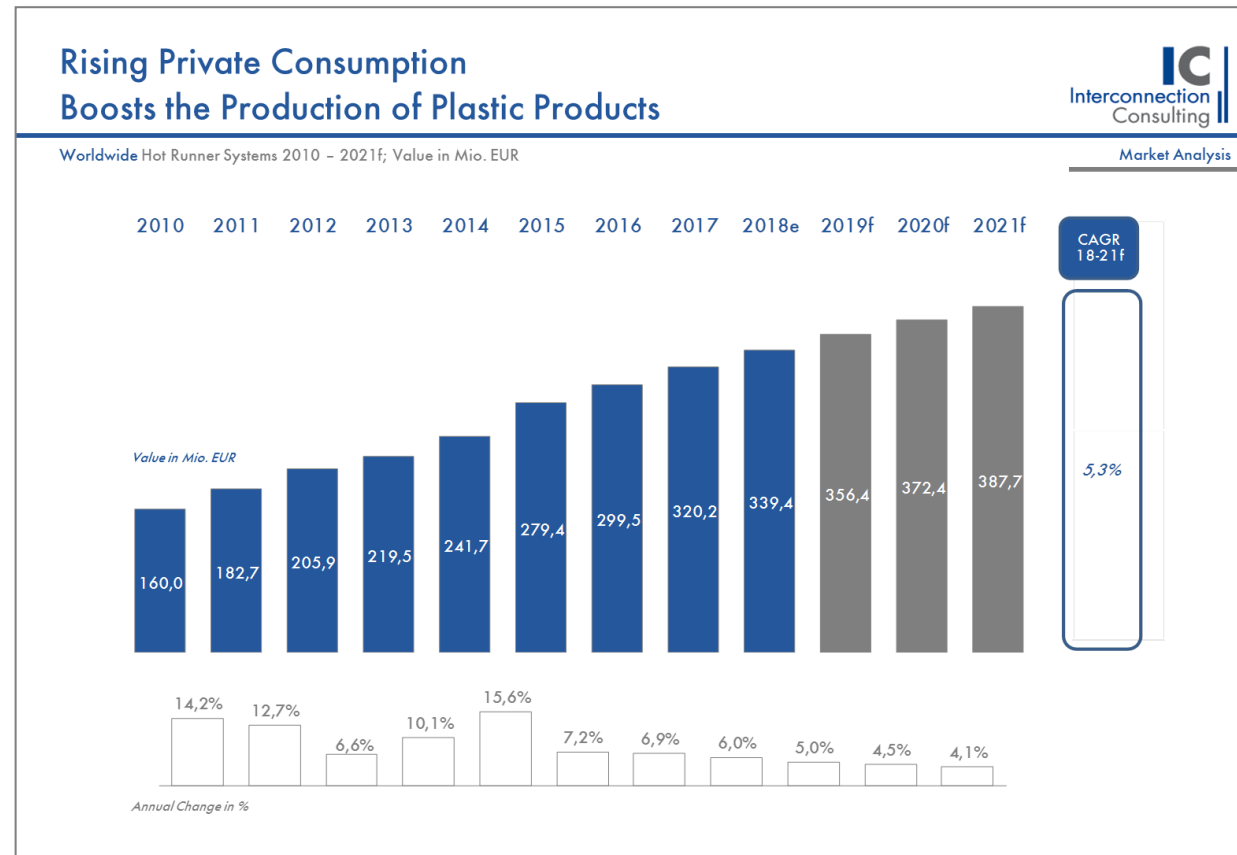
The IC Market Tracking® is modularly built and consists of the following sections:

- 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 analyzed 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.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

- Development of relevant market influencing Factors. In depth analysis of 4 central growth-drivers for every application and region.
- This Chart shows Dummy Figures.*

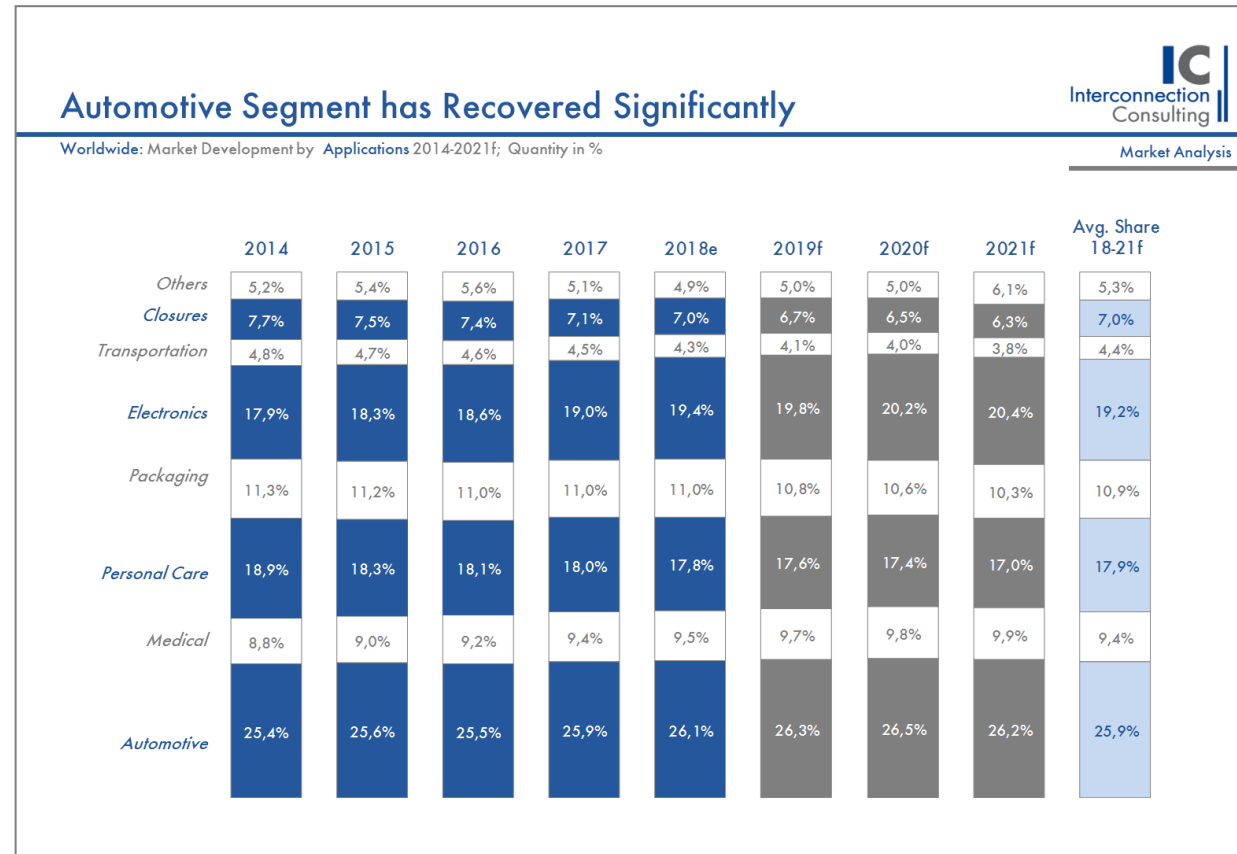


- Overview of the total world wide market as well as the regional markets separately until the current year and Forecast for the upcoming three years.
- This Chart shows Dummy Figures.*



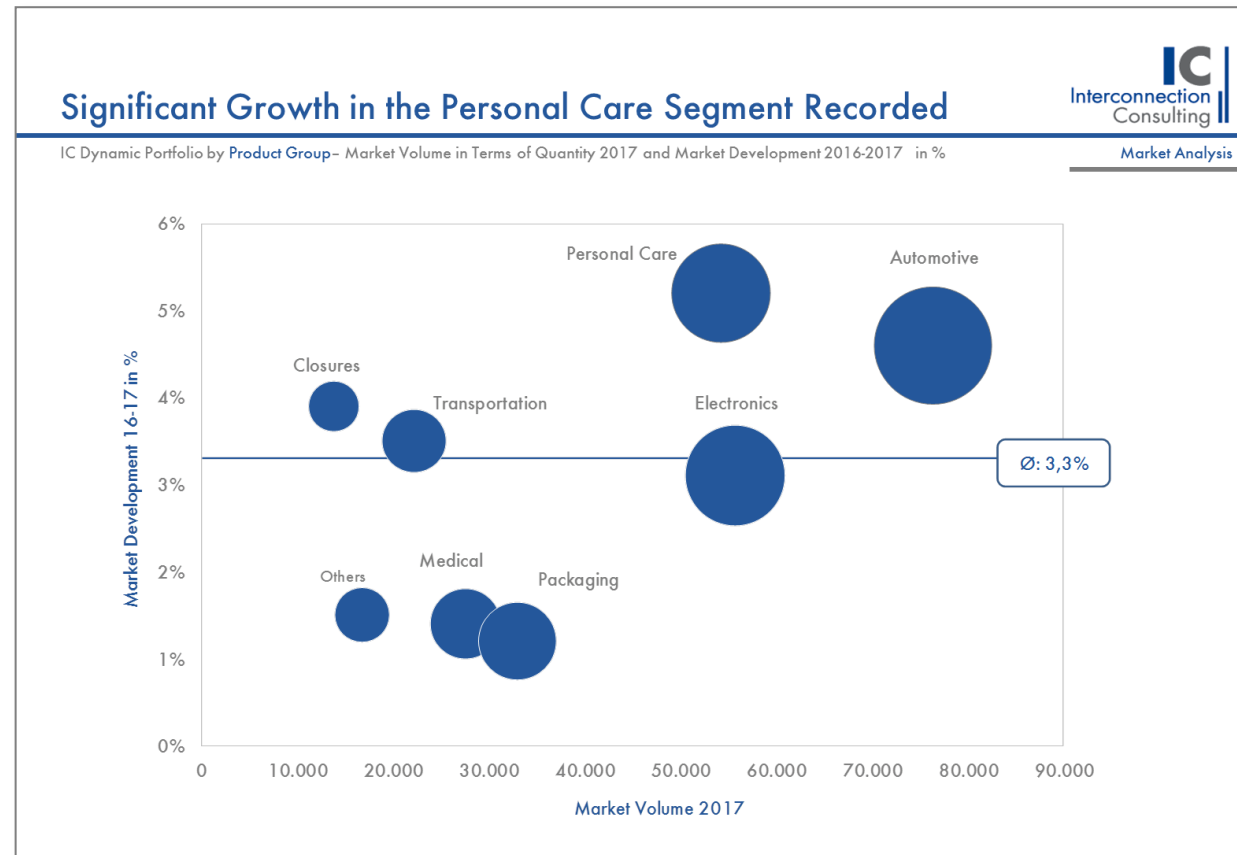
Analysis of Trend Concerning Applications, etc.

- Overview of the share of applications, as well as a forecast for the upcoming three years .
- This Chart shows Dummy Figures.*

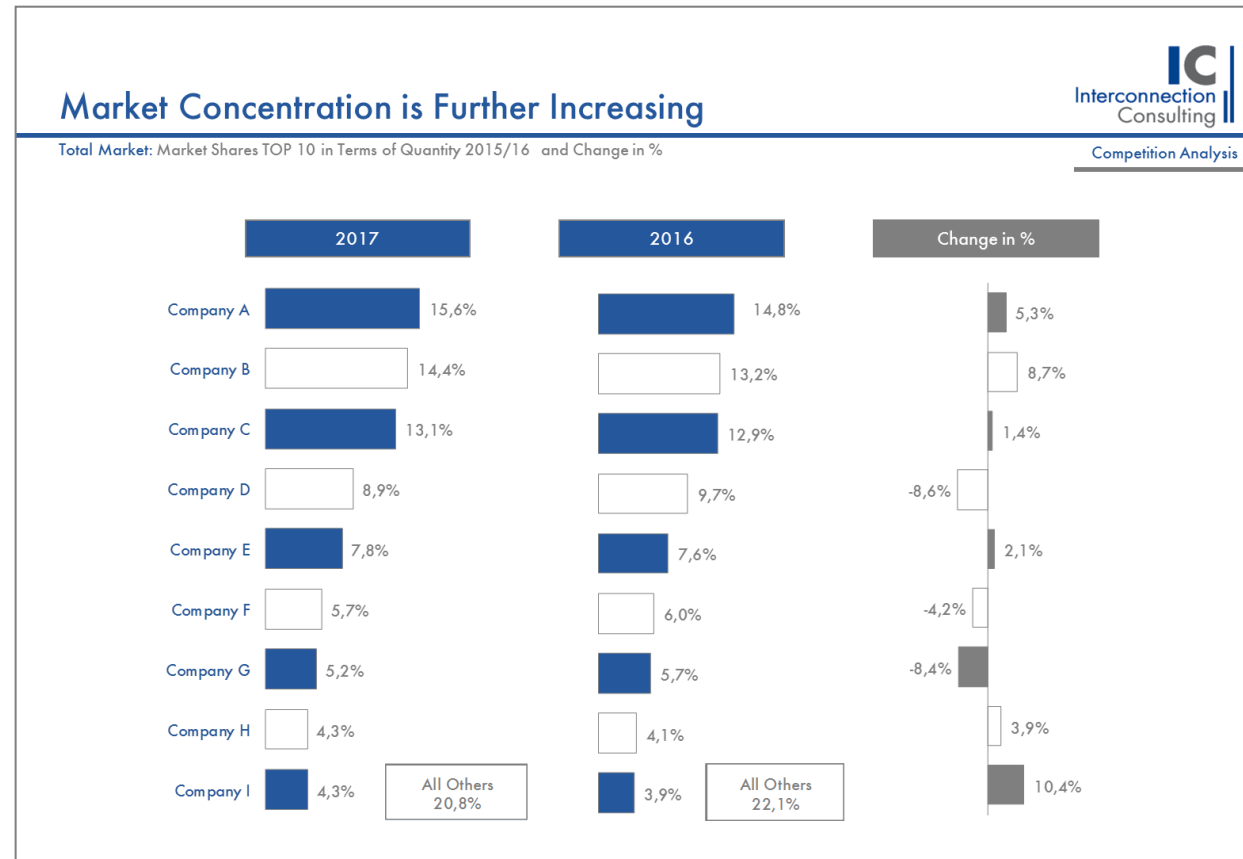


Strategic Analysis of the Surveyed Segments

- Strategic analysis of **application segments** by portfolio charts.
- *This Chart shows Dummy Figures.*



- Detailed description of the most important companies in the examined market with respect to **market shares, changes, BCG-Portfolios, etc.**
- *This Chart shows Dummy Figures.*



- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.

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)
∅ 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)
∅ 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

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Total Market - Europe	€ 5,950.-	
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In specific analyzed regions:

- America: USA & Canada, Rest of Americas
- Asia: China, India, Japan, Korea, Rest of Asia
- Europe: Northern Europe, Central Europe, UK & Ireland, France & Benelux, Eastern Europe, Southern Europe

* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

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Selected References of our Market Reports

„..... 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-Marketing & Communications Milacron Holdings Corp.





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For further questions,
please do not hesitate to contact us!

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