



# PROSPECTUS

## INJECTION MOLDING MARKET ANALYSIS, VALUE-IN-USE, & TECHNOLOGIES

4<sup>TH</sup> EDITION

PUBLISHED FEBRUARY 2021

# **\*\*Injection Molding Market Study 4th Edition\*\***

## *Highlights*

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- Published in February 2021. Includes a 372-page book and an electronic version available in Excel and Adobe Acrobat formats.
- Interviews were conducted with hundreds of companies throughout North America.
- The study is divided into four major market categories: (1) Packaging; (2) Medical and Personal Care; (3) Home & Office; and (4) Industrial & Commercial.
- The study includes an executive summary along with detailed data on 17 separate end-use markets.

### **Every chapter for each end-use market will provide in-depth coverage on the following topics:**

- Market size by total resin consumption and by resin type.
- Market size by total resin consumption and resin type
- Processor information i.e., name, location, consumption, and growth rates
- Total resin consumption and growth rates for each injection molder for each of the 17 markets
- Product Analysis - average selling price, margin, overhead, and other costs related to injection molding
- Detailed analysis of the factors affecting the growth or decline of each market such as, but not limited to, the economy, material substitution, government regulations, environmental issues, technological trends, imports, shifts of production from the USA to foreign countries, mergers & acquisitions, NAFTA and other world trade issues
- Growth rate comparison by each market and the major injection molders with qualitative data explaining the difference if one exists
- Capacity utilization actual 2019 and projected 2020
- Anticipated impact of additional PE and PP resin capacity on processors
- Processor sustainability involvement
- Favorite resins used for injection molding, favorite resin suppliers, and why
- Is there anything we didn't ask that we should have? Please elaborate.

## Selected Exhibits

**Total resin by type consumed for Injection Molding in U.S. and Canada for 2020 and projected for 2023 in MM lbs.**

Resin	2020	2023
	Consumption (MM lbs.)	Consumption (MM lbs.)
<b>PP (Polypropylene)</b>		
PP-impact copolymer		
PP-homopolymer		
PP-PCR		
PP-glass filled		
PP-impact copolymer PCR		
PP-talc filled		
PP-mineral filled		
PP-flame retardant		
<b>Total PP</b>		
<b>PET (Polyethylene Terephthalate)</b>		
PET		
PET-PCR		
PETG		
<b>Total PET</b>		
<b>HDPE (High Density Polyethylene)</b>		
MMW-HDPE (medium molecular weight)		
HMW-HDPE (high molecular weight)		
UHMW-HDPE (ultra high molecular weight)		
<b>Total HDPE</b>		
<b>PS (Polystyrene)</b>		
CPS (crystal polystyrene)		
HH-CPS (high heat-crystal polystyrene)		
HIPS (high impact polystyrene)		
PS-PCR		
<b>Total PS</b>		
<b>LLDPE (Linear Low Density Polyethylene)</b>		
LLDPE-butene		
LLDPE-hexene		
LLDPE-octene		
<b>Total LLDPE</b>		
Nylon-filled		
<b>Total Nylon</b>		
<b>GRAND TOTAL</b>		

Source: Mastio & Company Injection Molding Market Study

**Total resin consumption for 17 end-use markets for injection molding resins in U.S. and Canada for 2020 and projected for 2023 in MM lbs.**

<b>TOTAL NORTH AMERICAN INJECTION MOLDING RESIN CONSUMPTION 2020 AND 2023</b>					
<b>Chapter</b>	<b>Market</b>	<b>2020 Consumption (MM lbs.)</b>	<b>2023 Consumption (MM lbs.)</b>	<b>2020-2023 AAGR %</b>	<b>Growth/Decline 2020-2023 (MM lbs.)</b>
2	Food Packaging				
3	Lids, Caps, Closures, Overcaps & Dispensers				
4	Preforms				
5	Material Handling Products				
6	Pails				
<b>Packaging Subtotal</b>					
7	Medical Devices & Packaging				
8	Personal Care & Cosmetics				
<b>Medical &amp; Personal Care Subtotal</b>					
9	Outdoor Products				
10	Disposable Products				
11	Appliances				
12	Furniture				
13	Housewares & Office Products				
<b>Home &amp; Office Subtotal</b>					
14	Automotive Under-the-Hood				
15	Automotive Exterior				
16	Automotive Interior				
<b>Automotive Subtotal</b>					
17	Building & Construction				
18	Miscellaneous Industrial & Commercial Components				
<b>Industrial &amp; Commercial Subtotal</b>					
<b>Grand Total</b>					

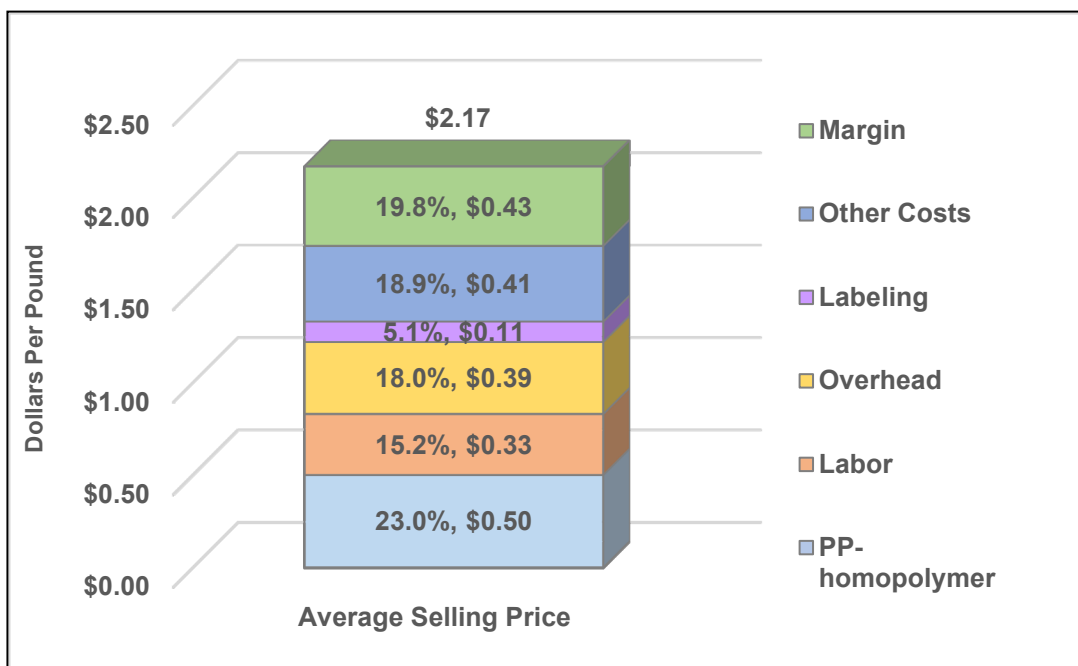
Source: Mastio & Company Injection Molding Market Study

Detailed information on the factors that affect the growth or decline of each market by processor.

Processor	Estimated share of the market %	% growth rate you see the market growing over the next three years	% growth rate you see <i>your company</i> growing over the next 3 years in the market	Key factors for decline or growth in each market
Company A	15%	4%	10%	New customers doing business with another supplier.
Company B	10%	3%	2%	Closing one of our facilities.
etc. ↓				

**Average Growth Rate 3.5%**

**VALUE-IN-USE ANALYSIS FOR AN 11.0” X 14.0” PP FAST FOOD TRAY**



Source: Mastio & Company Injection Molding Market Study

**Breakdown of resin consumption by process type.**

	2020	
	Consumption (MM lbs.)	Market Share (%)
<b>Thermoplastic Injection Molding Processes</b>		
Standard Injection Molding	884.6	93.5
Overmolding	37.1	3.9
Injection Compression Molding (ICM)	12.7	1.3
Structural Foam Molding	7.2	0.8
Co-injection Molding	4.7	0.5
<b>Total Thermoplastic Molding</b>	<b>946.3</b>	<b>100.0</b>
<b>Grand Total</b>	<b>946.3</b>	<b>100.0</b>

**Detailed listing of participants and their location.**

Company	Location
Company A	Van Buren, Arkansas
Company B	Oshkosh, Wisconsin
Company C	St. Louis, Missouri
Company D	Paris, Illinois
Company E	Elyria, Ohio
Company F	Jacksonville, Florida

**Capacity Utilization –provided in the electronic edition.**

Processor	Current Utilization 2019	Anticipated Utilization 2020	Reason for increase or decline
Company A	50%	75%	
Company B	80%	70%	
Company C	75%	80%	
Company D	75%	95%	
Company E	63%	70%	
Company F	93%	87%	

**What are the favorite resins that you use for injection molding and who supplies them to you? – included in the electronic edition.**

Resin Supplier	Why is this resin a favorite of yours?

## Resin consumption, market share, and AAGR by resin type, 2020 and 2023

Resin	2020		2023		2020-2023 AAGR (%)
	Consumption (MM lbs.)	Market Share (%)	Consumption (MM lbs.)	Market Share (%)	
PP-impact copolymer	82.8	21.2	92.8	21.0	3.9
PP-random copolymer	40.4	10.4	46.8	10.6	4.9
PP-homopolymer	39.2	10.1	44.7	10.1	4.4
<b>Total LDPE</b>	<b>162.4</b>	<b>41.7</b>	<b>184.3</b>	<b>41.7</b>	<b>4.3</b>
MMW-HDPE	129.5	33.2	148.2	33.5	4.6
HMW-HDPE	3.7	0.9	3.7	0.8	0.0
<b>Total HDPE</b>	<b>133.2</b>	<b>34.2</b>	<b>151.9</b>	<b>34.4</b>	<b>4.4</b>
LLDPE-butene	41.4	10.6	47.7	10.8	4.8
LLDPE-octene	6.0	1.5	6.9	1.6	5.0
LLDPE-hexene	6.0	1.5	6.9	1.6	5.0
<b>Total LLDPE</b>	<b>53.4</b>	<b>13.7</b>	<b>61.6</b>	<b>13.9</b>	<b>4.8</b>
LDPE-homopolymer	21.0	5.4	24.3	5.5	4.9
PC	13.8	3.5	13.8	3.1	0.0
ABS	2.7	0.7	2.7	0.6	0.0
Nylon	1.4	0.4	1.4	0.3	0.0
SAN	1.4	0.4	1.4	0.3	0.0
PCR-PP	0.6	0.2	0.7	0.2	4.0
<b>GRAND TOTAL</b>	<b>389.9</b>	<b>125.3</b>	<b>442.1</b>	<b>125.3</b>	<b>4.2</b>

Alphabetical listing of injection molders by total resin consumption for each of the 17 end-use markets.

Injection Molders and their Primary Markets														
Company	Total Resin Use (MM lbs.)	Market Amounts in MM lbs.												
		2	3	4	5	6	7	8	9	10	11	12	13	14
Company A	91.6	0.6				1.0								
Company B	72.2									0.8	0.4			0.8
Company C	2.7	0.7					0.2	0.2	0.2					
Company D	55.0													
Company E	11.2												0.2	
Company F	5.3													
Company G	71.5													
Company H	55.9											5.9		
Company I	22.0				0.3			0.4		0.1				
Company J	82.0							2.0						
Company K	170.1		168.3	0.9	0.9									
Company L	7.0		1.9											
<b>GRAND TOTAL</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>	<b>xx</b>

Source: Mastio & Company Injection Molding Market Study

**Listing of Injection Molders by total resin consumption (largest to smallest).**

<b>Exhibit</b>	
<b>2020 INJECTION MOLDING ANNUAL CONSUMPTION BY COMPANY</b>	
Note: Multi-divisional companies have been listed separately along with their parent company in brackets.	
<b>Company</b>	<b>Quantity (MM lbs.)</b>
Company A	1,275.0
Company B	702.0
Company C	601.8
Company D	600.0
Company E	540.0
Company F	484.0
Company G	458.9
Company H	412.1
Company I	402.8
Company J	385.2
Company K	382.0
Company L	360.0
Company M	320.0
Company N	319.6
Company O	315.0
Company P	310.5
Company Q	300.2
Company R	300.0
Company S	274.9
Company T	230.2
Company U	213.5
Company V	209.0
Company W	181.5
Company X	175.0
Company Y	168.0
Company Z	166.8

Source: Mastio & Company Injection Molding Market Study



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