

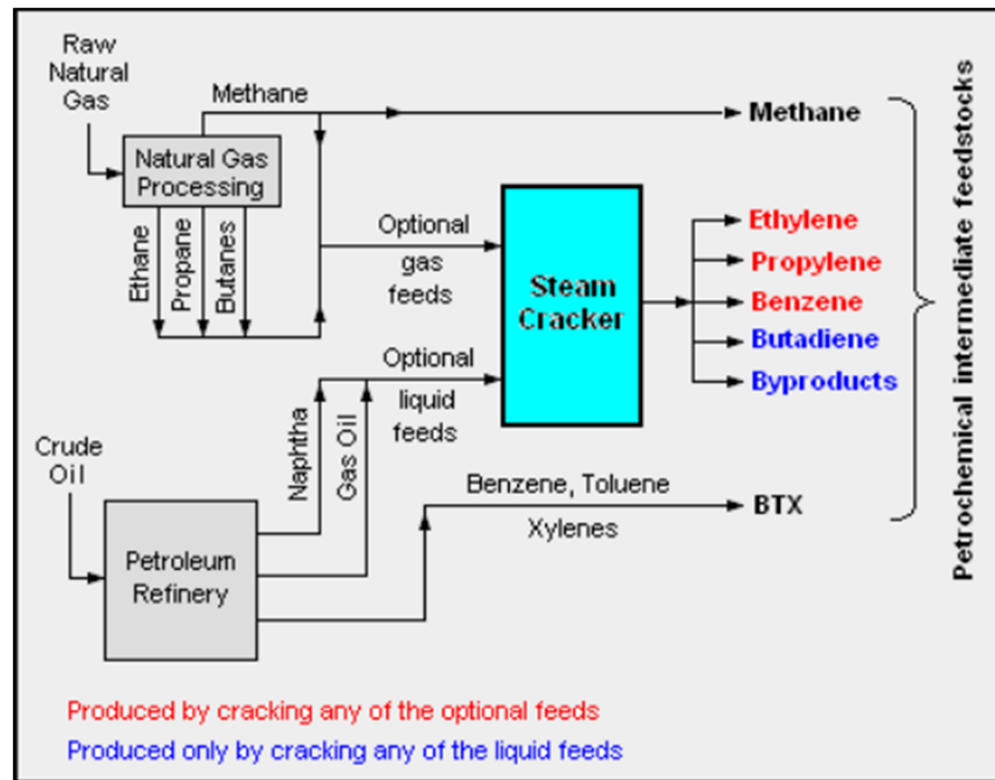


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Chain Reaction: From Petrochemicals to Plastics Manufacturing



From Petrochemicals to Plastics Manufacturing





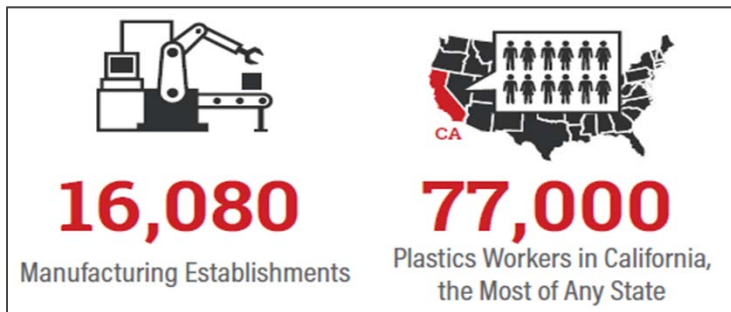
thisisplastics.com

https://youtu.be/L6_Zxj1U-GA





One industry that makes a positive impact



TOP STATES FOR PLASTICS EMPLOYMENT
(PLASTICS INDUSTRY, 2016)

Rank	State	Plastics Employment Thousands
1	California	77.0
2	Ohio	75.2
3	Texas	74.8
4	Michigan	70.6
5	Indiana	51.0
6	Illinois	50.8
7	Pennsylvania	47.9
8	Wisconsin	39.8
9	North Carolina	38.3
10	New York	30.6
U.S. Total		964.6

Source: ©PLASTICS Size and Impact 2016

2016: Plastics Employment in Appalachia Region

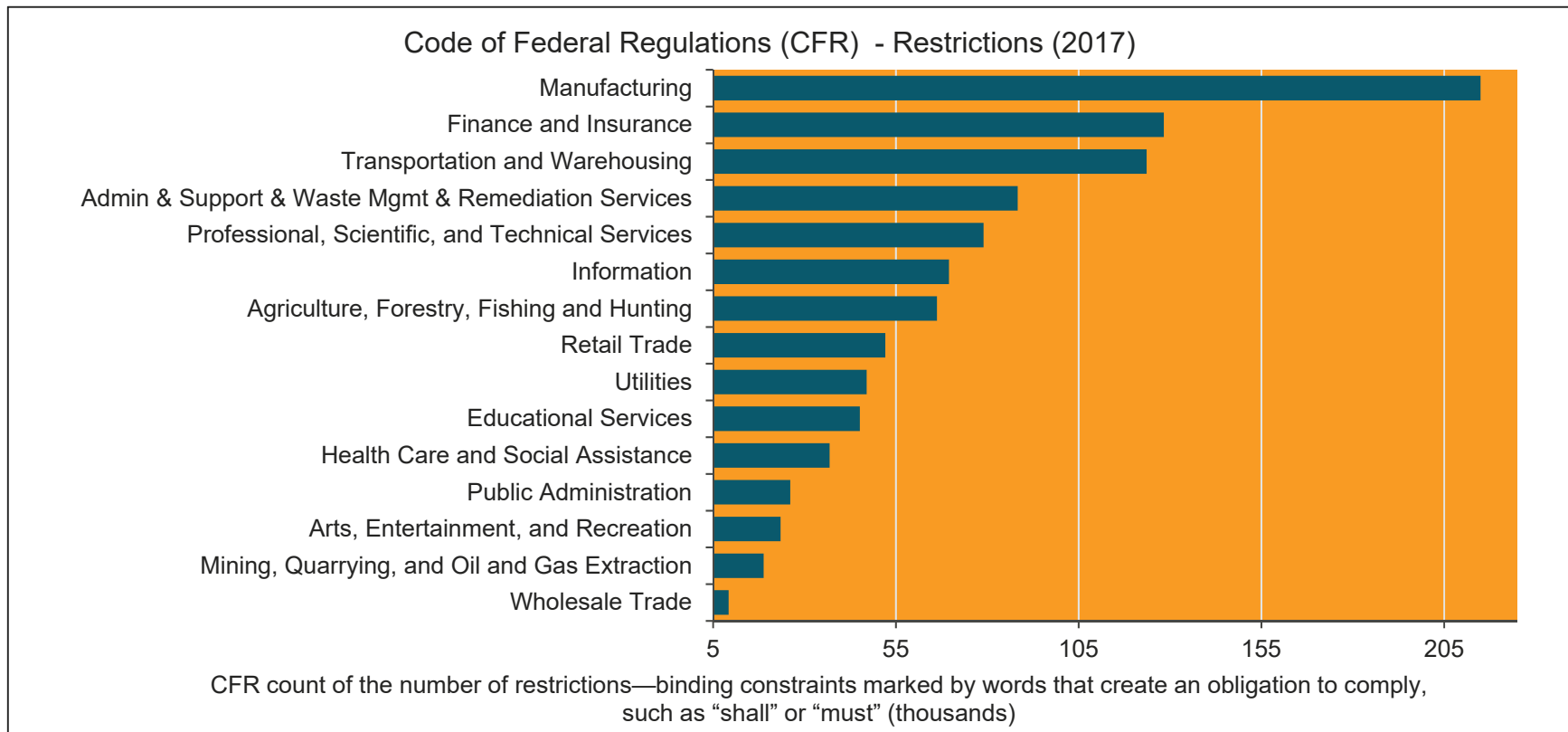
Rank	State	Employment (Thousands)	Payroll (\$ Millions)	
			Plastic Industry	Dependent Industries
2	Ohio	75.2	3,680	71,940
7	Pennsylvania	47.9	2,400	76,870
9	North Carolina	38.3	1,880	53,940
10	New York	30.6	1,580	121,660
11	Georgia	29.1	1,420	48,610
12	Tennessee	28.0	1,350	39,090
13	Kentucky	27.2	1,280	25,320
14	South Carolina	25.4	1,330	24,610
15	Alabama	21.4	1,040	24,320
21	Virginia	17.3	910	43,160
29	Mississippi	8.2	390	13,990
35	West Virginia	5.3	350	8,740
37	Maryland	4.7	340	35,180

Source: © PLASTICS Size and Impact 2016





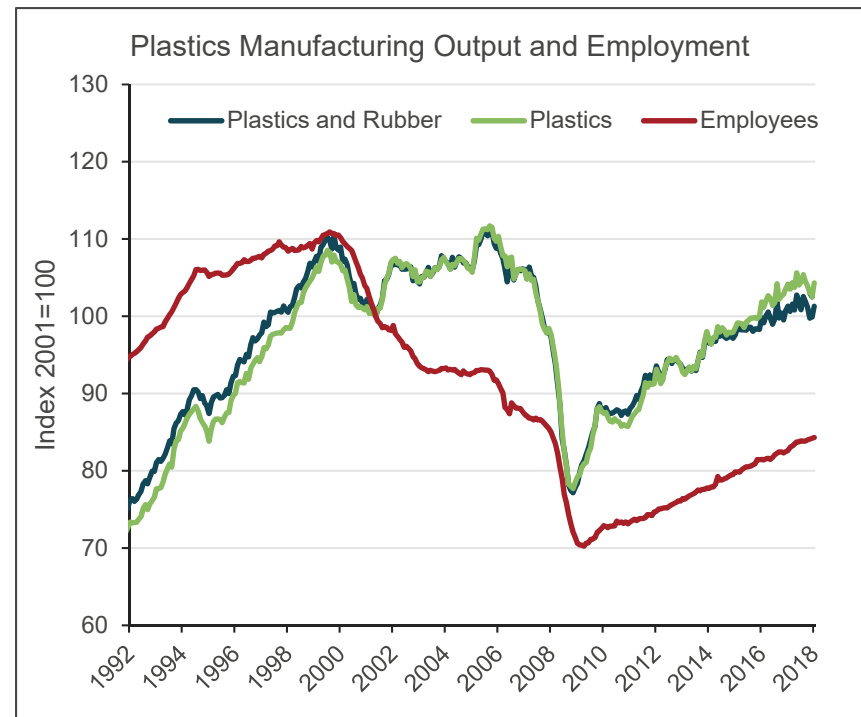
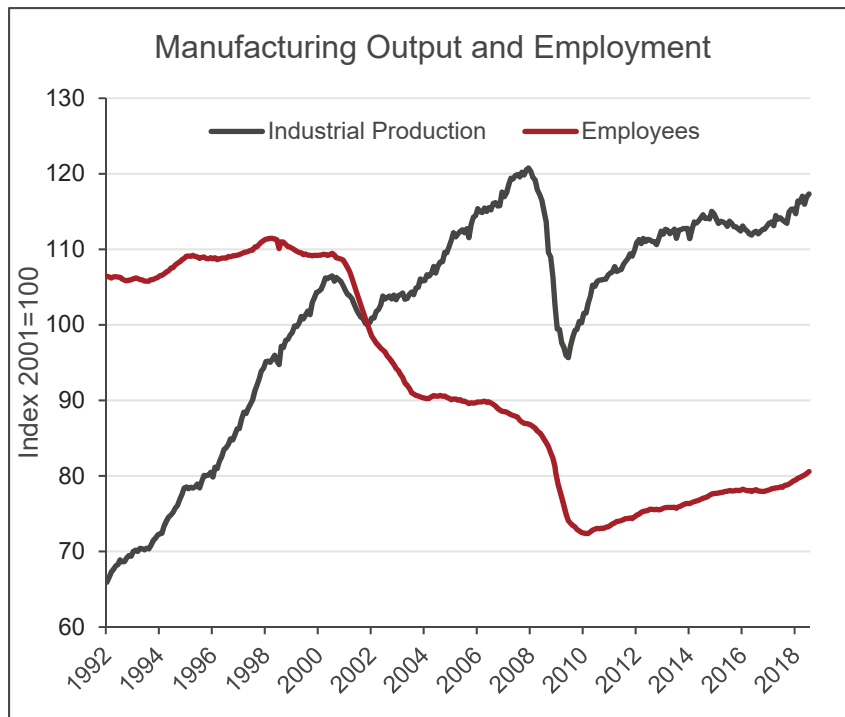
U.S. Regulatory Environment



Source: McLaughlin, Patrick A., and Oliver Sherouse. RegData US 3.1 Annual (dataset). QuantGov, Mercatus Center at George Mason University, Arlington, VA, 2018.



Manufacturing Output and Employment



Plastics Industry 2017 Production (\$ 2012)

Plastics
materials
and resins
\$87 B

Plastics
machinery
and
equipment
\$3.5 B

Plastics
molds
\$6.3 B

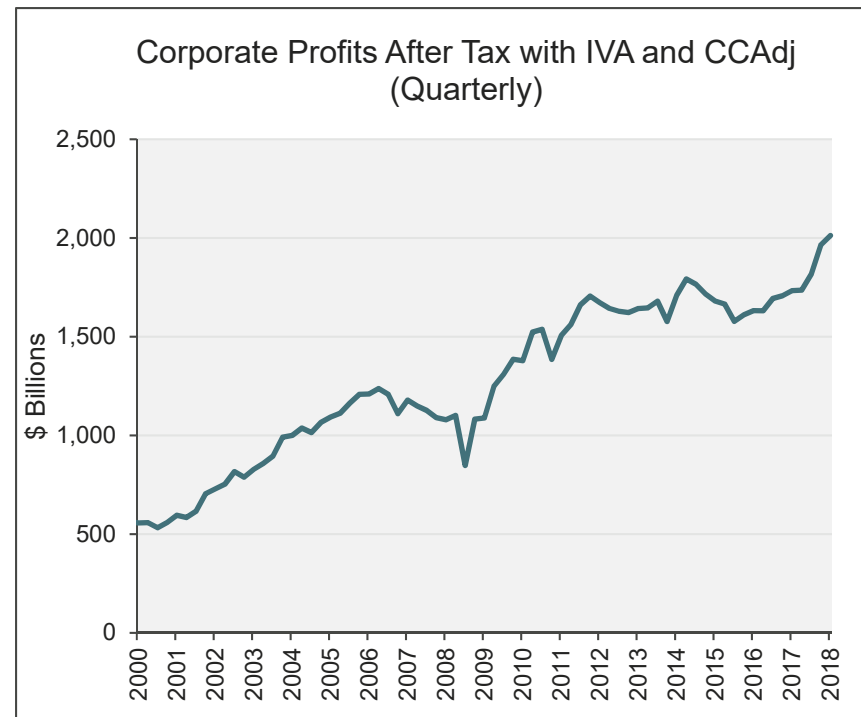
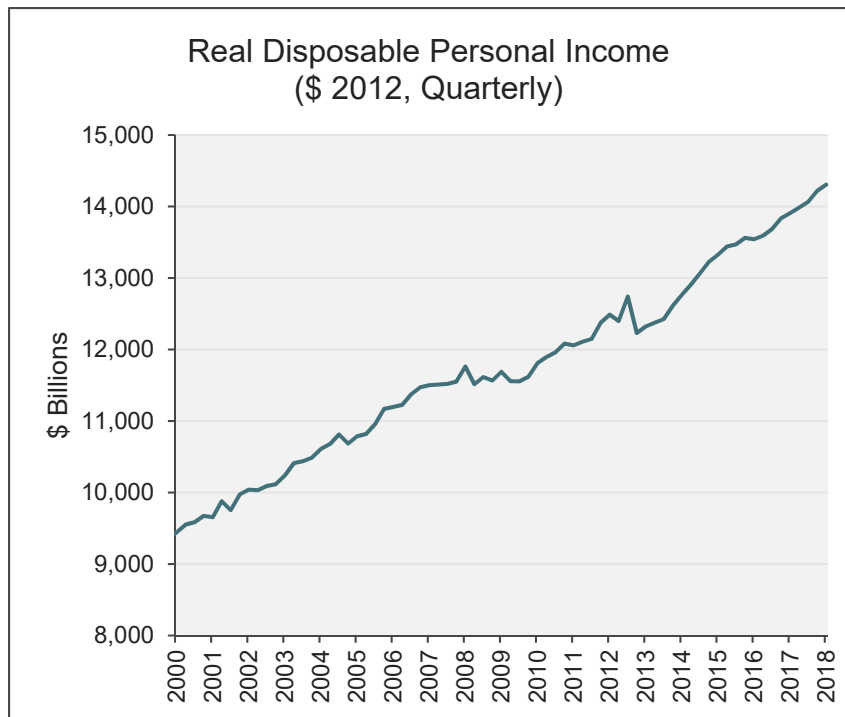
Plastics
products
\$193.5 B



Source: PLASTICS analysis of U.S. Bureau of the Census data



U.S. Household and Business Sector



Source: Bureau of Economic Analysis

Plastic's Annual Business Outlook

The Plastics Business Outlook Index, at 164, is 20 points higher than six months prior to the survey. In the next six to 12 months:

- 🏠 70 % of respondents foresee an increase in the volume of business.
- 🏠 63 % expect the work force in their companies to increase.
- 🏠 58 % anticipate an increase in planned capital expenditure.
- 🏠 60 % project the highest growth in packaging, followed by consumer products (55 %) and building and construction (48 %).
- 🏠 63 % expect continued U.S. economic growth.



Source: © PLASTICS

Medical Devices Global Market Forecast (\$ Bil)

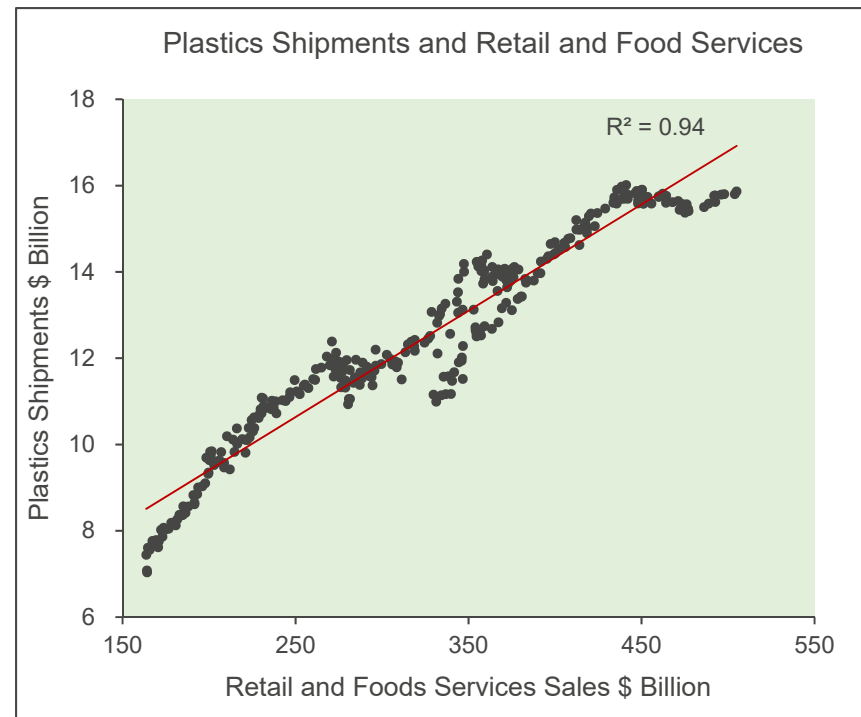
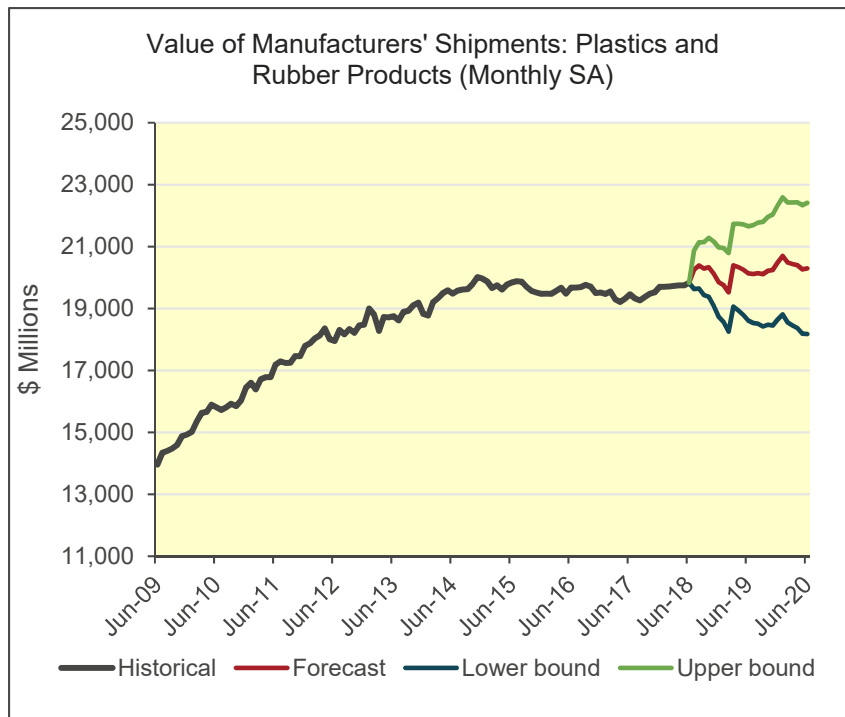
Region	2018	2019	2020
Americas	187.3	197.9	208.6
Asia/Pacific	77.6	82.9	88.6
Central/Eastern Europe	17.0	18.1	19.1
Middle East/Africa	11.5	12.5	13.2
Western Europe	92.6	101.4	106.2
Total	386.1	412.8	435.8

Source: U.S. Department of Commerce





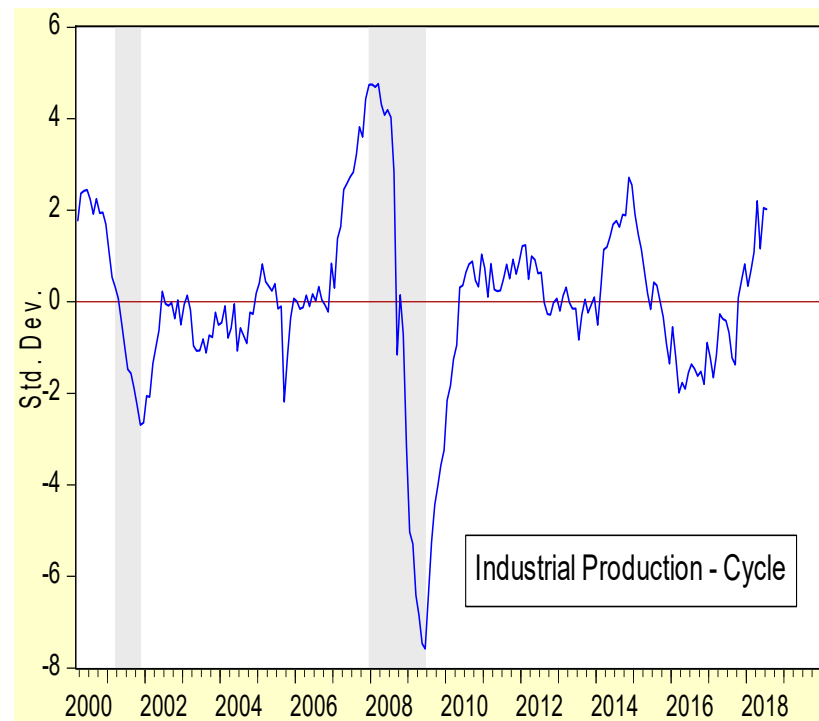
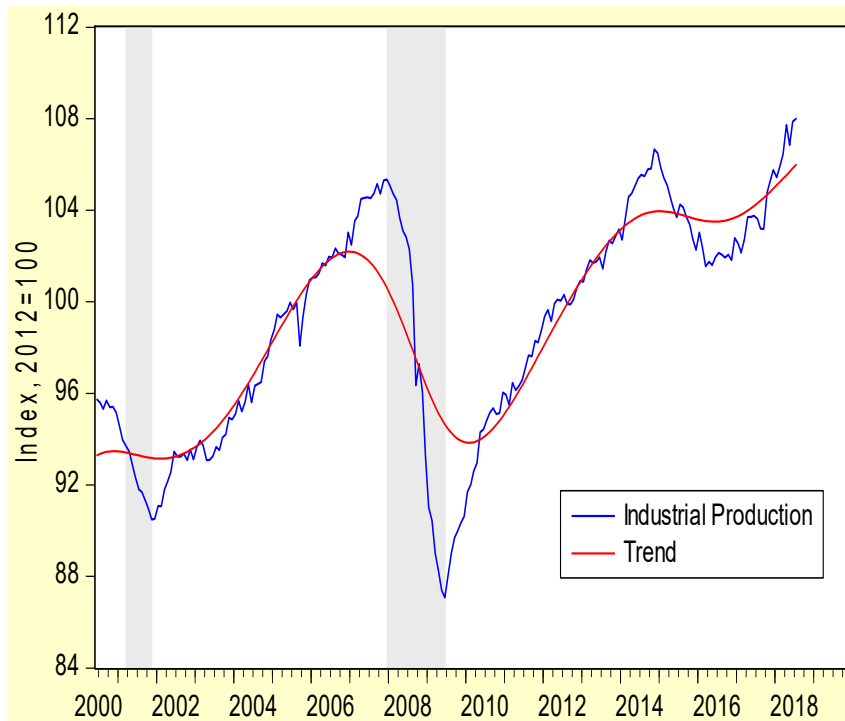
Plastics Shipments and Retail Sales



Source: PLASTICS analysis of U.S. Bureau of the Census data



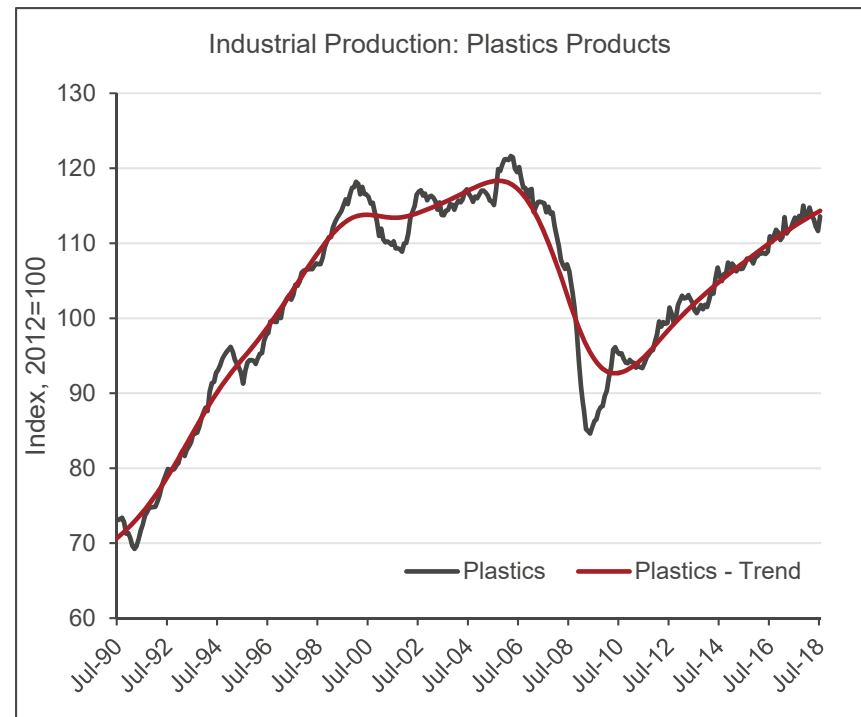
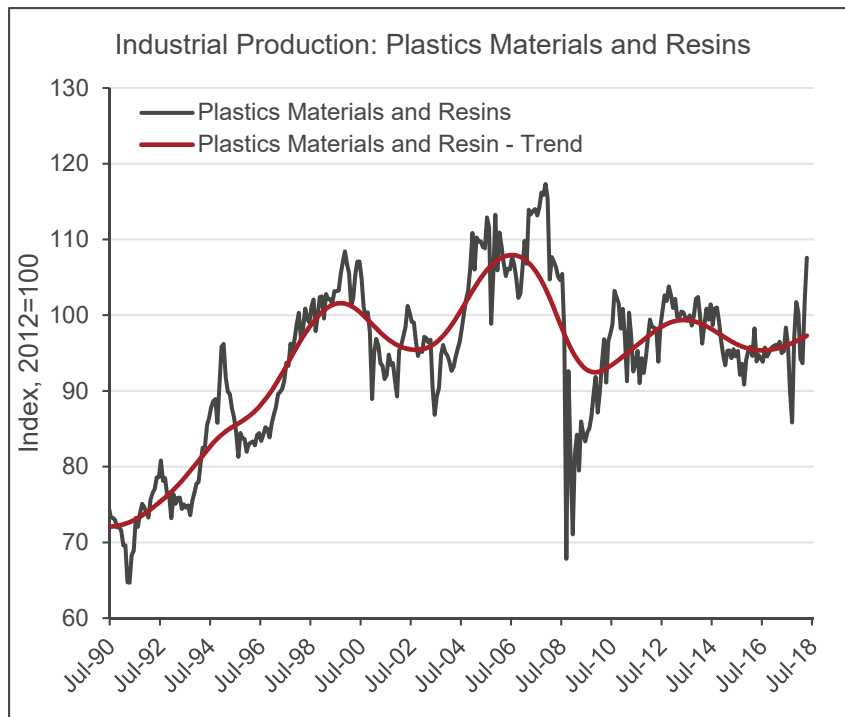
Industrial Production Index



Source: PLASTICS analysis of data from the Board of Governors of the Federal Reserve System



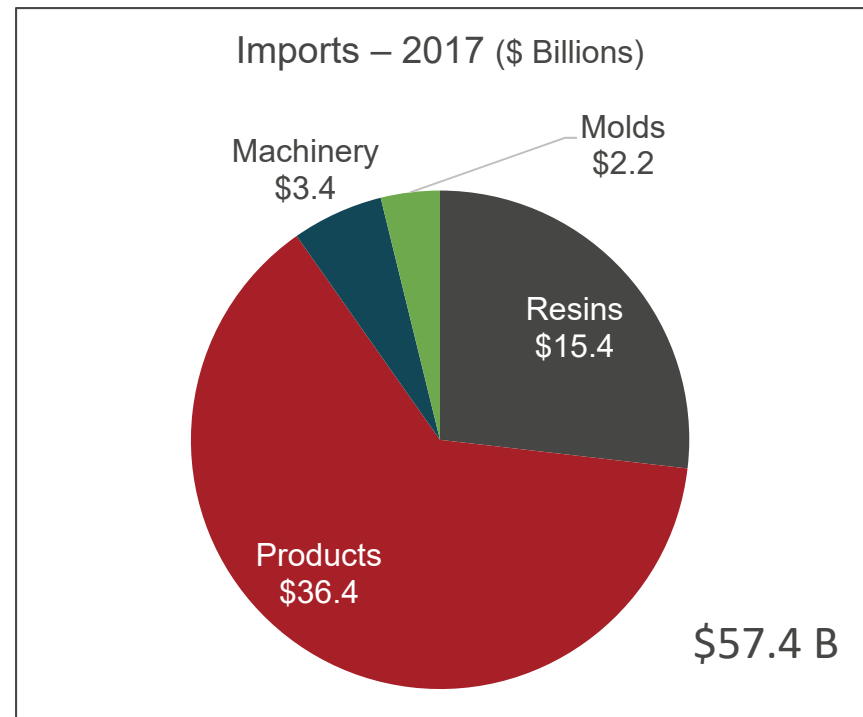
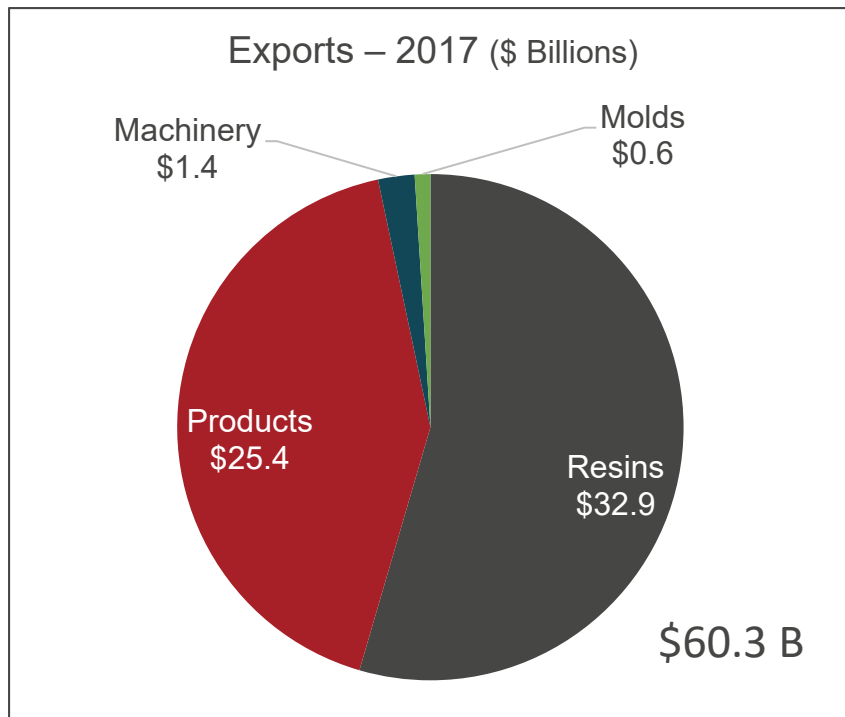
Industrial Production Trends



Source: PLASTICS analysis of data from the Board of Governors of the Federal Reserve System



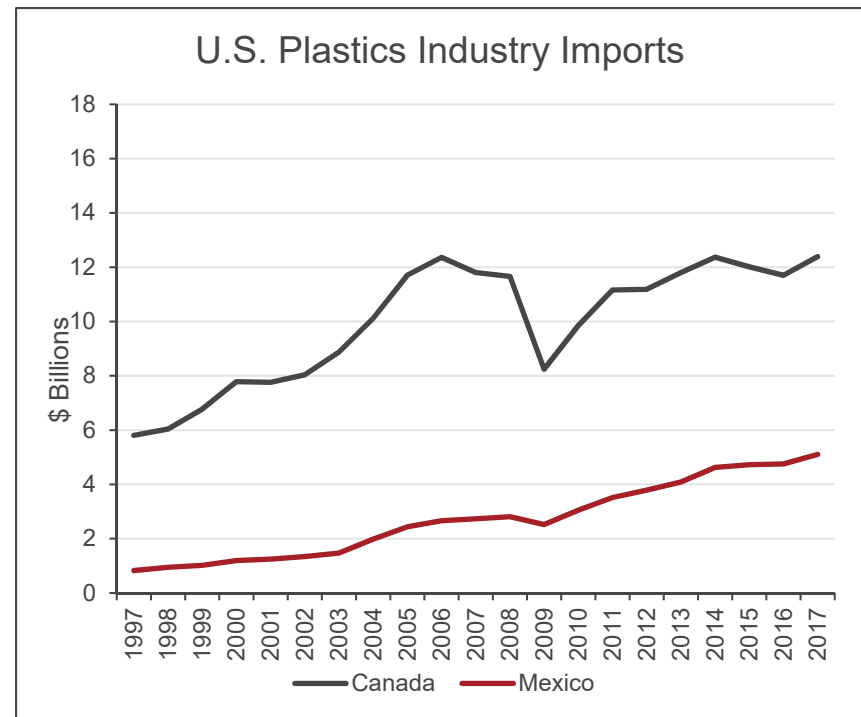
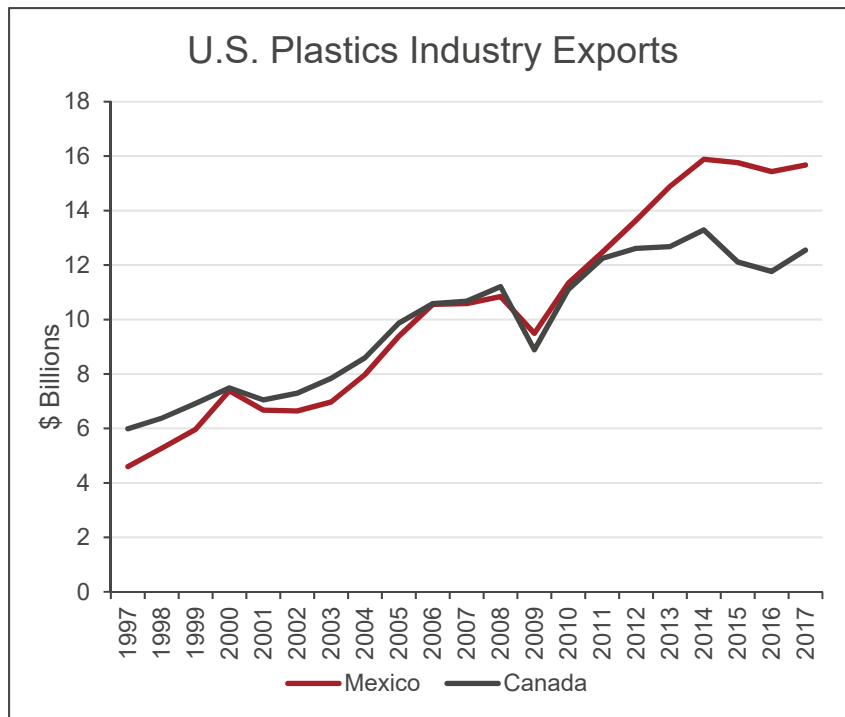
Plastics Industry Global Trade



Source: © PLASTICS Global Trends 2018 (Forthcoming)

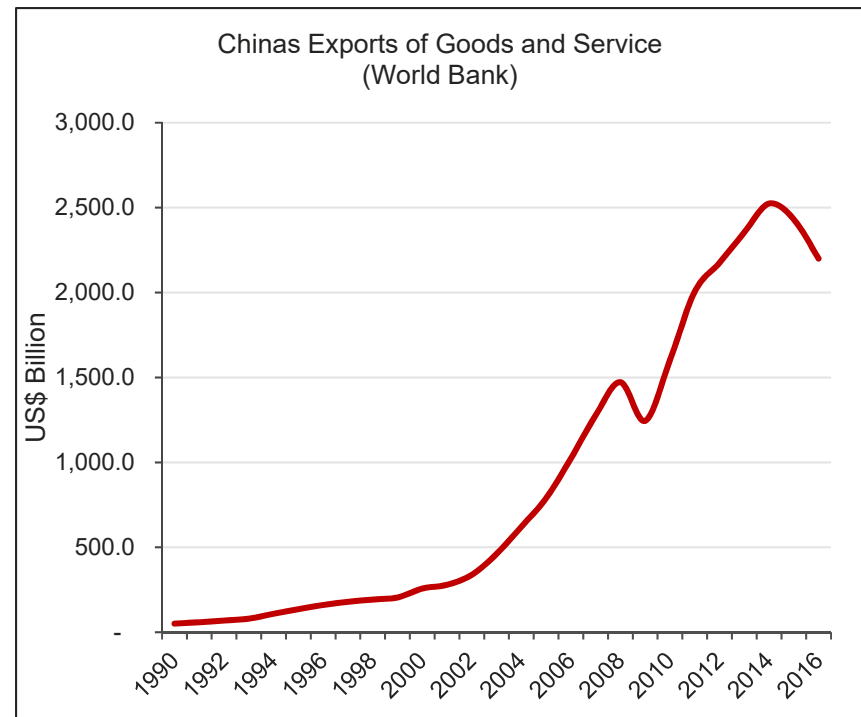
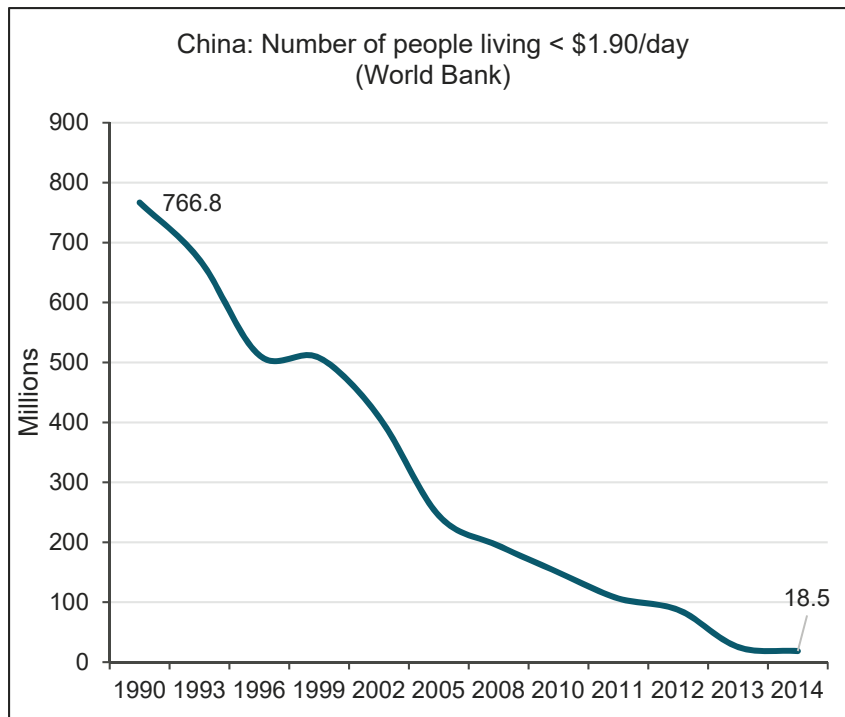


NAFTA Plastics Trade



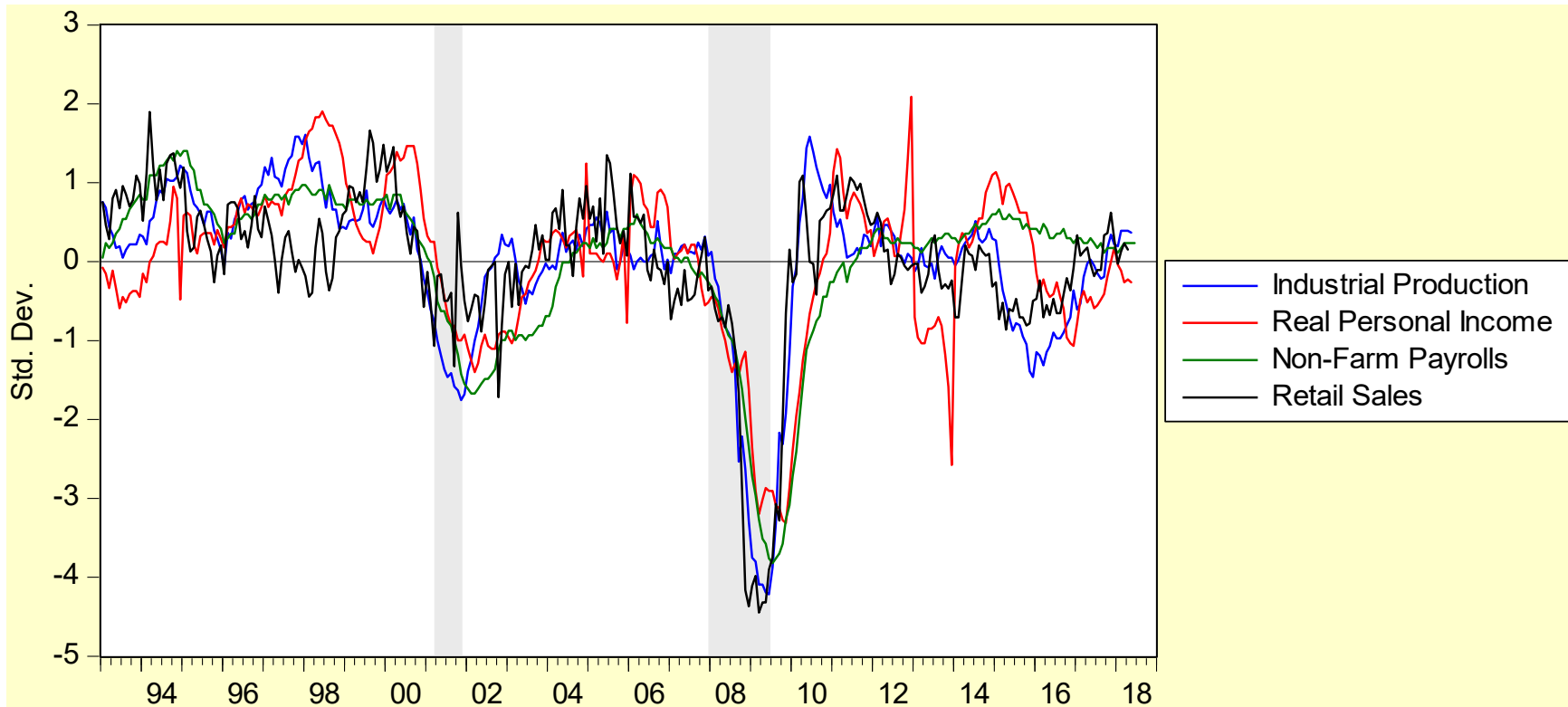


Exports: A boon to Chinese Economy





Four Monthly Coincident Indicators



Summing Up

- ⬢ Petrochemical industry critical to the competitiveness of U.S. plastics industry
- ⬢ Negative effects of labor shortage in manufacturing will be more pronounced next year
- ⬢ Barring further deterioration of U.S. trade relations with its partners, plastics industry growth will continue
- ⬢ The need for common sense regulation for all industries
- ⬢ U.S. economic fundamentals, currently, are sound



Thank you

