

## PRESS RELEASE

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### MASTERBATCH THE STAR PERFORMER OF THE WORLD PLASTICS INDUSTRY

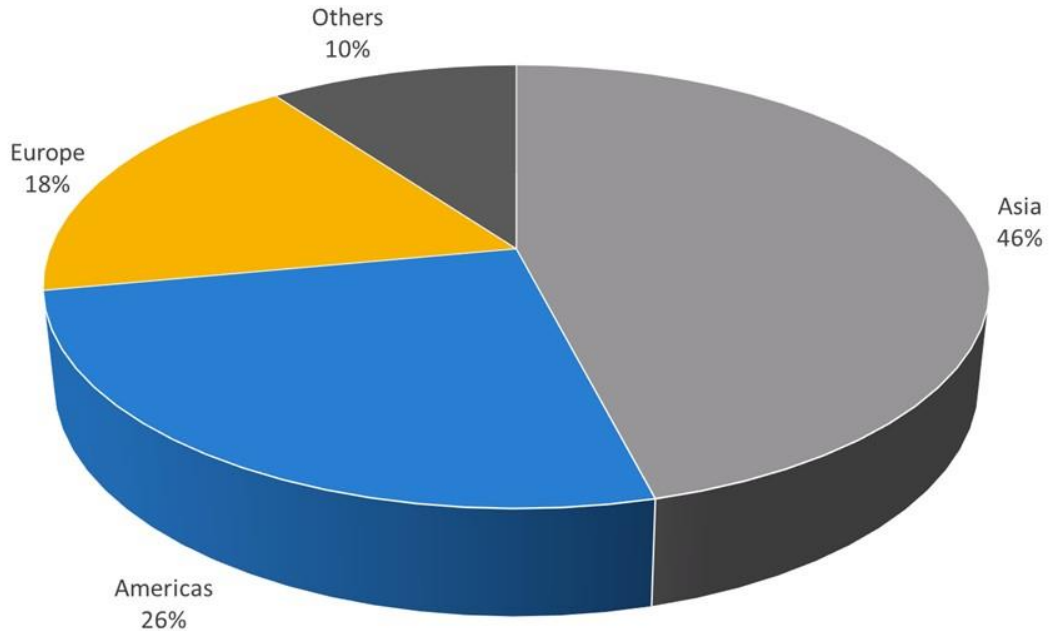
AMI Consulting, Bristol, 20/02/2019– The masterbatch industry is showing strong growth on the back of growing polymer demand and its ability to replace alternative methods of polymer modification, according to an authoritative new report just published by leading industry consultants in the field, AMI Consulting. The global masterbatch industry continues to outperform both GDP and polymer demand growth with all regions of the world and all product types benefiting from these trends. The result will be a growth rate in excess of 5% per annum for the medium term. These findings are the bedrock of the new analysis just produced by AMI Consulting. Building on an unequalled experience derived from over 30 years of investigating this global market the report details not just supply and demand but also comments on the changing nature of the industry structure. The emergence of global players combined with the active role played by private equity are driving a revised business structure in all markets. Currently the largest ten global producers of masterbatch account for around one third of the industry, given the pace of this change in the world this share is forecast to accelerate in the medium-term future.

However, grasping the opportunity is not easy. Growing competitive intensity, raw material supply and pricing volatility, increased specifications and heightened customer service requirements all demand that participants think carefully about the sectors that they engage in. It is already clear that missteps are costly to company development and profitability.

The report quantifies, in detail, masterbatch demand for each world region according to masterbatch type (black, white, colour and additive) well as providing an analysis of the industry's supply structure and up-to-date information on the end use application demand for each variety. It is clear that the over 130,000 injection moulders in the world account for the largest customer group for masterbatch, however, as many of these companies are active in packaging applications (almost two thirds of colour masterbatch demand) there will be challenges as the “circular economy” debate influences the market in all the corners of the world.

The market is intrinsically linked to the size, growth and relative maturity of demand for polymers around the world. Thus China, as the world's largest consumer of polymer, is also the largest individual country market and in total Asia accounted for 46% of global masterbatch demand 2018, compared with 18% in Europe and 26% in the Americas. The markets of Asia will continue to be key drivers for the masterbatch industry going forward driven by the markets of China and India.

**FIGURE 1:  
 THE GLOBAL MARKET FOR THERMOPLASTIC MASTERBATCH**



Source: AMI, 2019

An AMI Consulting report – Thermoplastic Masterbatch – The Global Market 2019

**Thermoplastic Masterbatch – The Global Market 2019** provides current and forecast information and is intended to support the strategic decisions that are required of participants to ensure they keep abreast of developments within this fast-changing industry. It will assist in anticipating change, formulating strategies, directing R&D investment, and proactively managing threats and opportunities.

AMI Consulting has published several multi-client studies in the Masterbatch field including individual very detailed reports on each geographic region of the world.

For further information please contact Andrew Reynolds at [andrew.reynolds@ami.international](mailto:andrew.reynolds@ami.international)  
 Tel: +44 (0)117 9249442