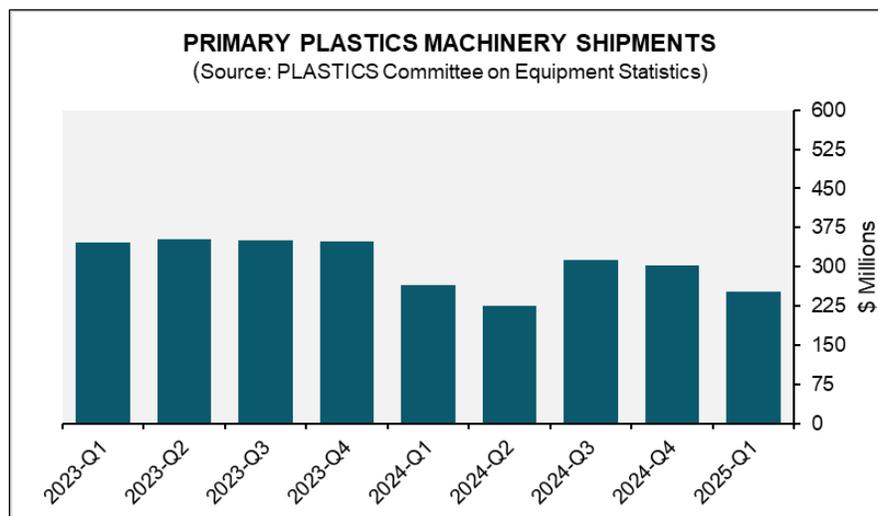


Tariff Uncertainty Weighs on Plastics Equipment Shipments in Early 2025

The Plastics Industry Association's Committee on Equipment Statistics (CES) has released Q1 2025 shipment data for primary plastics machinery in North America, covering injection molding and extrusion. The total shipment value was estimated at \$252.1 million, representing a 17.5% decrease from the revised fourth-quarter estimate and a 4.6% decline year-over-year.

Plastics machinery shipments declined for the second consecutive quarter in Q1. Quarterly gains in single- and twin-screw extruder shipments—up 17.2% and 3.2%, respectively—were offset by a 21.8% drop in injection molding shipments. Year-over-year, extruder shipments rose strongly, with single-screw up 31.2% and twin-screw up 10.9%, while injection molding shipments fell 8.9%.



“Shipments appeared to pause in the first quarter as businesses reassessed strategies amid uncertainty surrounding U.S. tariffs and trade policy,” said PLASTICS Chief Economist Perc Pineda, PhD. “While there appear to be green shoots in plastic product manufacturing, capacity utilization, and the broader manufacturing sector in the first quarter, it is too soon to project the short-term path of equipment shipments as trade policy remains in flux,” Pineda added.

Amid evolving tariff rates and rollout timelines, U.S. plastics equipment imports rose 6.2% in the first quarter to \$939.4 million, up 5.5% from the same period last year. Exports fell by 1.1% from the prior quarter to \$325.3 million, marking an 18.6% year-over-year decline.

In the first-quarter survey of CES members, 62% of respondents expected market conditions to remain steady or improve over the next 12 months—down from 83% in the previous quarter. However, 42% reported an increase in quoting activity, up from 31% in the prior survey.

Pineda noted, “One cannot overlook the capacity of plastics processors to meet end-market demand previously filled by imports affected by tariffs. In the first quarter, business investment in industrial equipment rose 4.8% (SAAR), with metalworking machinery up 15.8%. Increased domestic plastics conversion would have positive ripple effects throughout the industry's supply chain.”