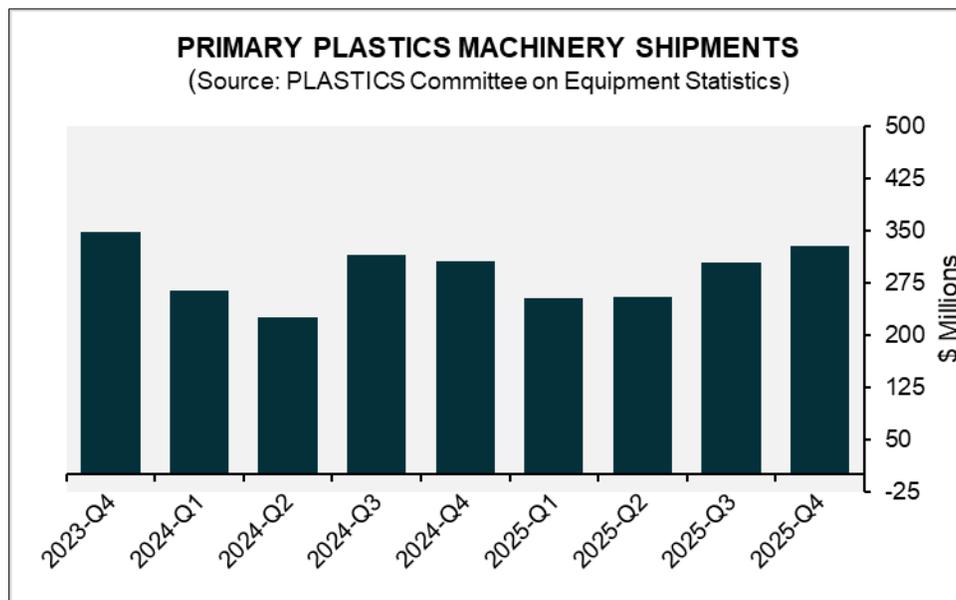


## U.S. Plastics Machinery Shipments Climb for Third Straight Quarter Amid Tariff Headwinds

The Plastics Industry Association’s Committee on Equipment Statistics (CES) released its fourth-quarter shipment data for primary plastics machinery in North America, including injection molding and extrusion equipment. Total shipment value was estimated at \$327.0 million—up 7.8% from the third quarter and 7.0% year-over-year.

Gains in single-screw extrusion and injection molding shipments offset a decline in twin-screw extrusion, resulting in a net increase for the quarter. Single-screw extrusion and injection molding rose 15.5% and 8.7%, respectively, from the previous quarter, while twin-screw extrusion fell 8.2%. Year-over-year, single-screw extrusion increased 14.5% and injection molding rose 7.0%, while twin-screw extrusion shipments remained flat.



Shipments of primary plastics machinery rose for the third consecutive quarter in Q4, in step with the U.S. macroeconomy, which managed to grow in 2025 despite tariff headwinds for many equipment suppliers. “Market adjustments across the plastics industry supply chain in response to higher tariffs appear to have helped deter further deterioration during what has been a soft plastics manufacturing year,” said Perc Pineda, PhD, Chief Economist at the Plastics Industry Association.

On U.S. plastics machinery trade, the Customs value of imports reached \$3.5 billion in 2025, up 1.8%, while calculated duties surged 179% to \$374 million. Exports fell 10.5% to \$1 billion, pushing the trade deficit in plastics machinery up 7.8%.

In the CES fourth-quarter survey, members were noticeably less pessimistic about market conditions. The share anticipating deterioration in the next quarter dropped from 48% to 13%, while those expecting conditions to remain steady or improve over the next 12 months rose from 58% to 83%.

Pineda added, “The moderate economic growth outlook for 2026 remains unchanged. What may have improved, however, is the prospect that sectors that lagged in previous years—such as construction—could outperform as borrowing costs decline, generating increased demand for plastics and, by extension, plastics equipment.”