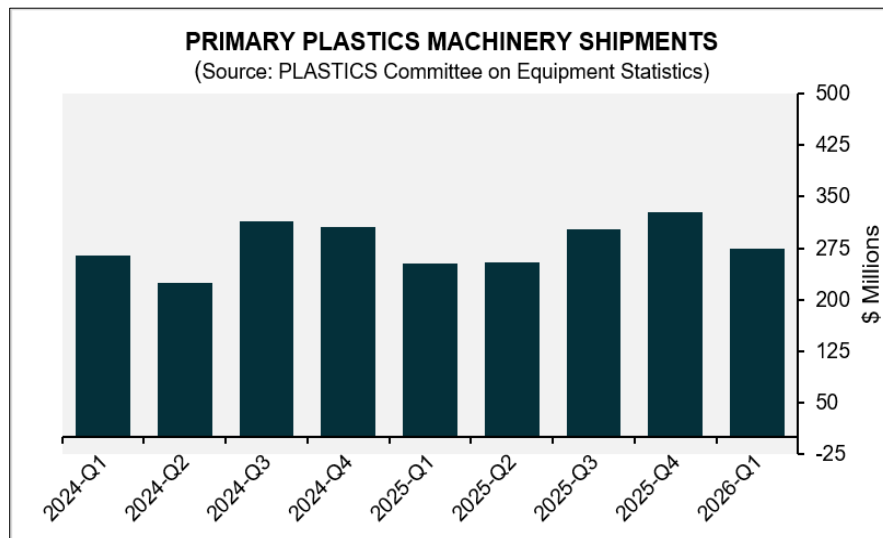


A Soft Start for U.S. Plastics Machinery Shipments in 2026

The Plastics Industry Association's Committee on Equipment Statistics (CES) released its first-quarter shipment data for primary plastics machinery in North America, including injection molding and extrusion equipment. Total shipment value was estimated at \$273.5 million, down 16.4% from the fourth quarter of last year. Meanwhile, shipments increased 8.5% year over year (YoY).

Shipments declined across all categories of primary plastics machinery. Twin-screw extrusion recorded the largest decline, falling 51.2% from the previous quarter, while single-screw extrusion decreased 24.4%. Injection molding shipments declined 13.0% quarter over quarter (QoQ), but up 19.0% YoY. Meanwhile, single-screw and twin-screw extrusion shipments fell 26.2% and 52.7%, respectively, YoY.



The reversal in shipments from the fourth quarter of last year to the first quarter of this year reflects two factors. “First-quarter shipments are usually lower than fourth-quarter shipments, as business momentum tends to slow following a typically busy final quarter of the previous year. This pattern also explains why shipments remained higher than a year earlier. We have seen this pattern consistently over time in the data,” said Perc Pineda, Chief Economist at the Plastics Industry Association.

Despite higher tariffs, shipments increased in the second half of 2025. Previous market adjustments across the plastics industry supply chain amid higher tariffs likely came at a cost to businesses, many of which were unable to pass higher costs on to customers because of existing contracts. “At the turn of 2026, businesses likely adjusted their pricing contracts to reflect higher tariff costs, which is a second reason why plastics equipment shipments reversed by double digits,” Pineda added.

In U.S. plastics machinery trade, the Customs value of imports totaled \$930.4 million in the first quarter, down 1.8% from the first quarter of last year. Calculated duties, however, more than tripled, increasing from \$39.0 million in the first quarter of 2025 to \$118.9 million in the first quarter of 2026.

In the CES first-quarter survey, members' optimism about market conditions softened, a change from the previous survey results. The share anticipating deterioration in the next quarter increased from 13% to 20%, while the share expecting conditions to improve over the next 12 months fell from 39% to 29%.

The U.S. economy expanded by 2.0% in the first quarter, while the PLASTICS' monthly plastics demand estimate averaged \$22.7 billion over the last twelve months as of February.