



## MAPP SOI Block 1

# Welcome to MAPP's 2024 State of the Plastics Industry Survey!

Plastics industry executives can make better tactical decisions and validate the status of their operations when they understand current industry conditions.

MAPP's State of the Plastics Industry Survey was created by plastics business leaders who understand the importance of staying up-to-date on the changing conditions of the marketplace.

This executive survey is the only survey of its kind in the United States plastics industry!

The final report will only be electronically distributed **to MAPP members who complete the survey in full**. Non-members can purchase the report from the MAPP website at a discounted price.

All individual survey responses will be kept entirely confidential.

**Deadline: January 10, 2025**

Please click below to begin the survey.

**Please enter your contact information:**

First Name

Last Name

Company

Job Title

Email Address

**Please list which US State your facility resides in:**

**What is your facility's Primary Business Activity?**

Blow Molding

Compression Molding

Compounding

Extrusion

Injection Molding

Rotational Molding

Thermoforming

Other (please specify)

**What is your facility's Total Annual Revenue?**

> \$4,999,999

\$5,000,000 - \$14,999,999

\$15,000,000 - \$49,999,999

≥ \$50,000,000

**What type of molding does your facility specialize in?**

Proprietary Molder

Custom Molder

Combination of Both

Other (please specify)

**What is the number of production facilities in your organization?**

**What is the total number of employees in your organization?**

**Do you have a customer who accounts for at least 80% of your total annual revenue?**

Yes

No

**Please use the following table to outline your organizational customer and industry diversity (skip any industries that your organization does not serve).**

		Industries Served (check all that apply)
Aerospace	<input type="checkbox"/>	
Agriculture	<input type="checkbox"/>	
Appliance	<input type="checkbox"/>	
Automotive	<input type="checkbox"/>	
Business Machines	<input type="checkbox"/>	
Capital Goods	<input type="checkbox"/>	
Communications	<input type="checkbox"/>	
Construction	<input type="checkbox"/>	
Consumer Goods	<input type="checkbox"/>	
Construction	<input type="checkbox"/>	
Defense	<input type="checkbox"/>	
Electronics	<input type="checkbox"/>	
Energy	<input type="checkbox"/>	
Environmental	<input type="checkbox"/>	
Fire Prevention	<input type="checkbox"/>	
Food / Beverage	<input type="checkbox"/>	
Government	<input type="checkbox"/>	
Industrial	<input type="checkbox"/>	

		Industries Served (check all that apply)
Lawn & Garden	<input type="checkbox"/>	
Marine	<input type="checkbox"/>	
Medical	<input type="checkbox"/>	
Mining	<input type="checkbox"/>	
Packaging	<input type="checkbox"/>	
Plumbing	<input type="checkbox"/>	
Recreational	<input type="checkbox"/>	
Products	<input type="checkbox"/>	
Safety Products	<input type="checkbox"/>	
Transportation	<input type="checkbox"/>	
Other (please specify)	<input type="checkbox"/>	

**Please enter the approximate number of customers your organization serves for each industry.**

	Number of Customers
» Aerospace	<input type="text" value="0"/>
» Agriculture	<input type="text" value="0"/>
» Appliance	<input type="text" value="0"/>
» Automotive	<input type="text" value="0"/>
» Business Machines	<input type="text" value="0"/>
» Capital Goods	<input type="text" value="0"/>
» Communications	<input type="text" value="0"/>
» Construction	<input type="text" value="0"/>

Number of Customers

» Consumer Goods	<input type="text" value="0"/>
» Construction	<input type="text" value="0"/>
» Defense	<input type="text" value="0"/>
» Electronics	<input type="text" value="0"/>
» Energy	<input type="text" value="0"/>
» Environmental	<input type="text" value="0"/>
» Fire Prevention	<input type="text" value="0"/>
» Food / Beverage	<input type="text" value="0"/>
» Government	<input type="text" value="0"/>
» Industrial	<input type="text" value="0"/>
» Lawn & Garden	<input type="text" value="0"/>
» Marine	<input type="text" value="0"/>
» Medical	<input type="text" value="0"/>
» Mining	<input type="text" value="0"/>
» Packaging	<input type="text" value="0"/>
» Plumbing	<input type="text" value="0"/>
» Recreational	<input type="text" value="0"/>
» Products	<input type="text" value="0"/>
» Safety Products	<input type="text" value="0"/>
» Transportation	<input type="text" value="0"/>
» Other (please specify)	<input type="text" value="0"/>
#Conjoint, Total#	<input type="text" value="0"/>

**Please enter the percent of annual revenue generated from each industry (must add up to 100%).**

Percent of Annual Revenue Generated from this Industry (sum of answers should equal 100%)

» Aerospace	<input type="text" value="0"/> %
» Agriculture	<input type="text" value="0"/> %
» Appliance	<input type="text" value="0"/> %

Percent of Annual Revenue Generated from this Industry (sum of answers should equal 100%)

» Automotive	<input type="text" value="0"/> %
» Business Machines	<input type="text" value="0"/> %
» Capital Goods	<input type="text" value="0"/> %
» Communications	<input type="text" value="0"/> %
» Construction	<input type="text" value="0"/> %
» Consumer Goods	<input type="text" value="0"/> %
» Construction	<input type="text" value="0"/> %
» Defense	<input type="text" value="0"/> %
» Electronics	<input type="text" value="0"/> %
» Energy	<input type="text" value="0"/> %
» Environmental	<input type="text" value="0"/> %
» Fire Prevention	<input type="text" value="0"/> %
» Food / Beverage	<input type="text" value="0"/> %
» Government	<input type="text" value="0"/> %
» Industrial	<input type="text" value="0"/> %
» Lawn & Garden	<input type="text" value="0"/> %
» Marine	<input type="text" value="0"/> %
» Medical	<input type="text" value="0"/> %
» Mining	<input type="text" value="0"/> %
» Packaging	<input type="text" value="0"/> %
» Plumbing	<input type="text" value="0"/> %
» Recreational	<input type="text" value="0"/> %
» Products	<input type="text" value="0"/> %
» Safety Products	<input type="text" value="0"/> %
» Transportation	<input type="text" value="0"/> %
» Other (please specify)	<input type="text" value="0"/> %
#Conjoint, Total#	<input type="text" value="0"/> %

What are your expected revenue changes in 2025 for each

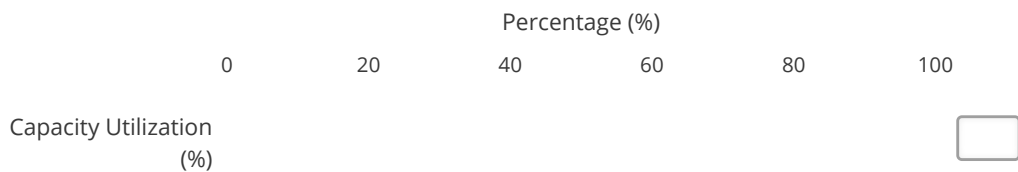
## industry you serve?

	Increase	Remain the Same	Decrease
» Aerospace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Agriculture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Appliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Automotive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Business Machines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Capital Goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Communications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Construction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Consumer Goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Construction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Defense	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Electronics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Environmental	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Fire Prevention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Food / Beverage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Industrial	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Lawn & Garden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



	Increase	Remain the Same	Decrease
» Marine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Medical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Mining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Packaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Plumbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Recreational	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Safety Products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
» Other (please specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**What percentage of your total production capacity did you utilize in Q4? Considering your standard production schedule (24/5, 24/6, 24/7, etc.).**



**Please compare the following indicators from the end of Q3 2024 to the end of the Q4 2024:**

	Significantly Increased	Increased	About the Same	Decreased	Significantly Decreased
Quoting Volume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backlog Orders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outstanding Accounts Receivable (Days Aging)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of Shipments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-Time Delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inventory Levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please compare the following Raw Materials indicators from the end of Q3 2024 to the end of the Q4 2024:**

	Significantly Increased	Increased	About the Same	Decreased	Significantly Decreased
Raw Material Lead Times	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw Material Prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please compare the following Workforce Management indicators from the end of Q3 2024 to the end of the Q4 2024:**

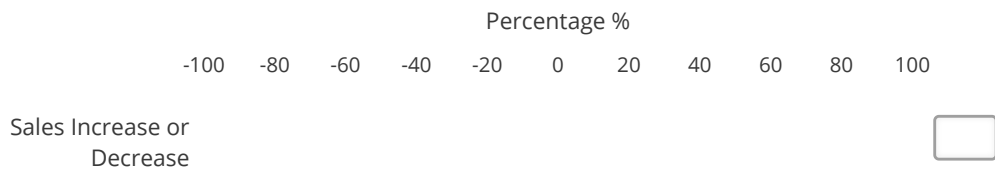
	Significantly Increased	Increased	About the Same	Decreased	Significantly Decreased
Open Positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Significantly Increased	Increased	About the Same	Decreased	Significantly Decreased
Number of Production Employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production Workweek	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operator Wages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time to Hire - Management Positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time to Hire - Skilled Positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time to Hire - Unskilled Positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee Turnover	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**In the 4th quarter of 2024, jobs received as a percent of jobs quoted (quoting hit rate) has been...**

- ≈ 0% - 2%
- ≈ 3% - 5%
- ≈ 6% - 10%
- ≈ 11% - 15%
- ≥ 15%

**By approximately what percentage have sales increased/decreased from one year ago? (If decreased put a negative sign in front of the percentage number)**



**If sales increased over the past year, do you attribute it to:**

New Customers

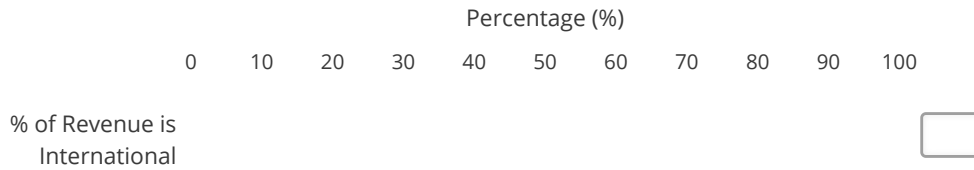
New Programs/Products with Current Customers

New Orders/Larger Orders with Existing Projects

Not Applicable

Other (please specify)

**What percentage of your current annual revenue is international?**



**How many countries are your customers currently located in?**

**If you were to quantify your total gains or losses due to foreign competition for 2024, your company...**

Gained business from foreign suppliers

Neither gained or lost business from foreign suppliers

Lost business to foreign suppliers

Lost customers due to them relocating production outside the U.S.

**If significant business was lost to foreign suppliers, please explain where they were located and for what reason:**

**From your customers' perspective, what is their general approach to new and/or existing business?**

Customers have aggressively looked for offshore suppliers

Customers have moderately looked for offshore suppliers

Customers have been open to the idea but have not actively looked for offshore suppliers

Customers have relocated work from offshore back to U.S. suppliers

Other (please specify)

**What are the current profit margins for your organization?**

> 15%

9% - 14%

5% - 8%

3% - 4%

< 3%

We are Currently Unprofitable

**Please identify the top three most significant current challenges interfering with your organization's profit margin goals:**

*Drag three statements to the box and put in order where #1 is the most significant challenge*

Items  
Declining Sales

Top three challenges (in order of significance)

Increasing Employee Wages	
Rising Inflation	
Healthcare Costs	
Increasing Resin Prices	
Recruiting Employees	
Retaining Employees	
Employee Training/Development	
Foreign Competition	
Domestic Competition	
Chaotic Supply Chain Network (Shipping and Receiving)	
Government Policies	
Environmental/Sustainability Regulations	
Other (please specify)	

**Please elaborate on why you identified these top three challenges/issues/problems:**

**How is the unavailability of resin currently impacting your business?**

**No impact**

**Slight impact:** Anticipate running out of resin on some jobs in the next 30 days

**Moderate impact:** Production is not running at 100% due to resin availability

**Extreme impact:** Production lines are not running and customers are being impacted

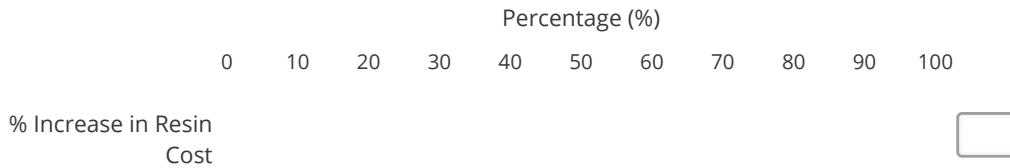
Did total resin cost increase, remain the same, or decrease from the end of Q3 2024 to the end of Q4 2024 (or did it stay the same)?

Increase

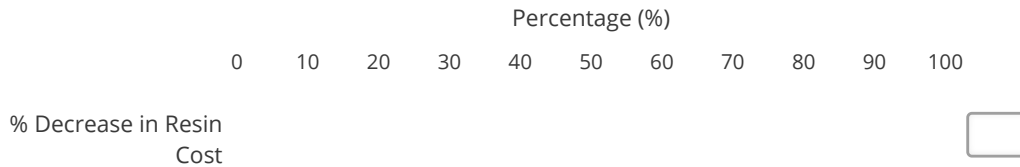
Remain the Same

Decrease

Identify the approximate percentage of total resin cost increase from the end of Q3 2024 to the end of Q4 2024:



Identify the approximate percentage of total resin cost decrease from the end of Q3 2024 to the end of Q4 2024:



Did total resin cost increase, remain the same, or decrease over the entire year in 2024 (or did it stay the same)?

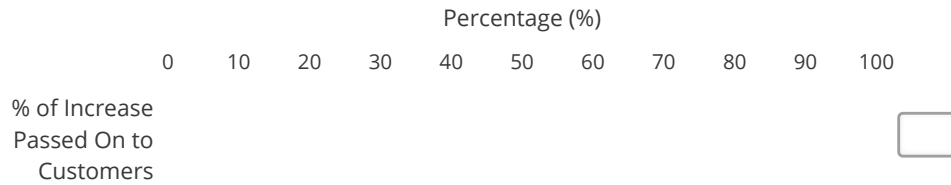
Increase

Remain the same

Decrease

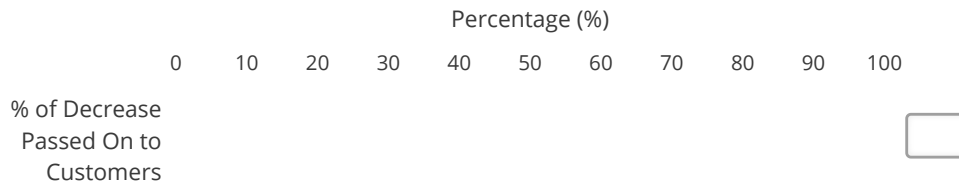
What approximate percentage of your overall raw material price increases did you pass on to your customers in 2024?

*i.e. - if your resin cost increased by 5%, did you pass on 100%, 50%, etc. of that increase to your customer?*



**What approximate percentage of your overall raw material price decreases did you pass on to your customers in 2024?**

*i.e. - if your resin cost decreased by 5%, did you pass on 100%, 50%, etc. of that decrease to your customer?*



**Identify any additional issues you may currently have with your supply chain. Do you have issues with or problems obtaining:**

Aluminum

Cardboard

Containers for Shipping

Electronic Components

Fasteners

International Freight

Machine Components

Raw Material Components

Steel

Trucking

We have no other issues with our supply chain

Other (please specify)



**What is your company's projected number of new tool/die builds in 2025?**

Number of New Builds:

**How much do you forecast spending on new tool/die builds in 2025 (rounded to the nearest thousand dollars)?**

Dollars (\$):

**What percentage of your total new tool/die build spend will be sourced within the United States in 2025?**

0                      20                      40                      60                      80                      100

% sourced within  
the United States

**Please identify the top three countries of origin for the production of tooling/dies used by your company outside of the United States.**

- We only source within the United States
- Austria
- Canada
- China
- Germany
- India
- Italy
- Japan
- Korea
- Portugal

Taiwan

Other (please specify)

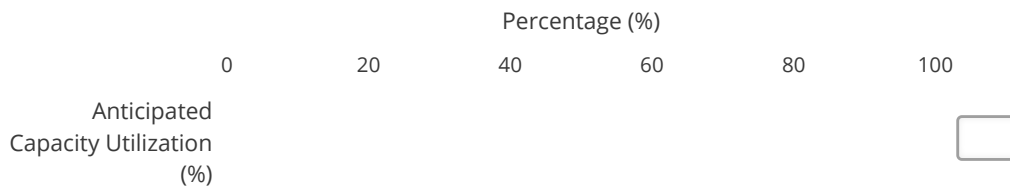
**Please identify the current trends for domestic production of tooling/dies:**

	Significantly Increasing	Increasing	No Change	Decreasing	Significantly Decreasing
Lead Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please identify the current trends for foreign production of tooling/dies:**

	Significantly Increasing	Increasing	No Change	Decreasing	Significantly Decreasing
Lead Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**What percentage of your total production capacity are you expecting to utilize in Q1 2025 (January-March)?**



**How does your forecast for capital expenditures in 2025 compare to 2024?**

Significantly Increase  Increase  No Change  Decrease  Significantly Decrease

**The majority of capital expenditures in 2025 will be used for...**

- Automation
- Auxiliary Equipment (Dryers, Conveyors, etc.)
- Equipment Repairs / Upkeep
- Primary Machines
- Structural (Buildings, Chillers, etc.)
- Technology (Computer Hardware / Software)
- Other (please specify)

**What is your total estimated capital expenditure budget for 2025?**

*Please enter amount in Dollars (\$):*

**Please estimate the capital dollar amounts to be spent in 2025 on the following categories:**

*NOTE: The sum of the below should equal the number provided in the previous question*

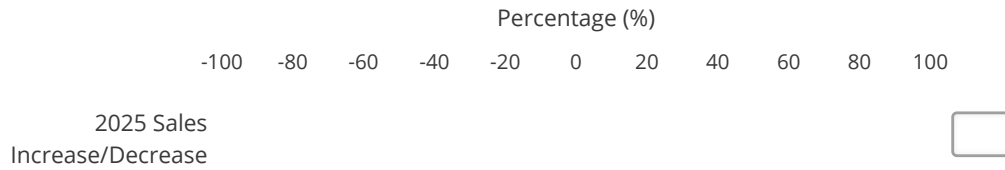
	Estimated Dollar Amount
Automation	\$ <input type="text" value="0"/>
Auxiliary Equipment (Dryers, Conveyors, etc.)	\$ <input type="text" value="0"/>
Equipment Repairs / Upkeep	\$ <input type="text" value="0"/>

Estimated Dollar Amount

Primary Machines	\$ <input type="text" value="0"/>
Structural (Buildings, Chillers, etc.)	\$ <input type="text" value="0"/>
Technology (Computer Hardware / Software)	\$ <input type="text" value="0"/>
Other Capital Expenditures	\$ <input type="text" value="0"/>
#Conjoint, Total#	\$ <input type="text" value="0"/>

**By approximately what percentage do you anticipate sales increasing/decreasing over the next 12 months?**

*Note: positive percentage would indicate an increase, and negative percentage would indicate a decrease*



**Please provide your forecast for Q1 2025 for the following:**

	Significantly Increase	Increase	No Change	Decrease	Significantly Decrease
The Average Production Employee Workweek	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Number of Production Employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please identify the market segments you perceive as the most optimistic and least optimistic for 2025:**

Most Optimistic Market Segment

Least Optimistic Market Segment

**Please elaborate on your perception of these market segments for 2024:**

**What major activity, if any, is planned to improve your company's competitiveness in 2025?**

**Which technologies do you believe will have the biggest impact on the plastics industry in 2025?**

**Is there any additional information you would like to share with us about the current state of your business?**

**Do you have any suggestions to improve this survey?**



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