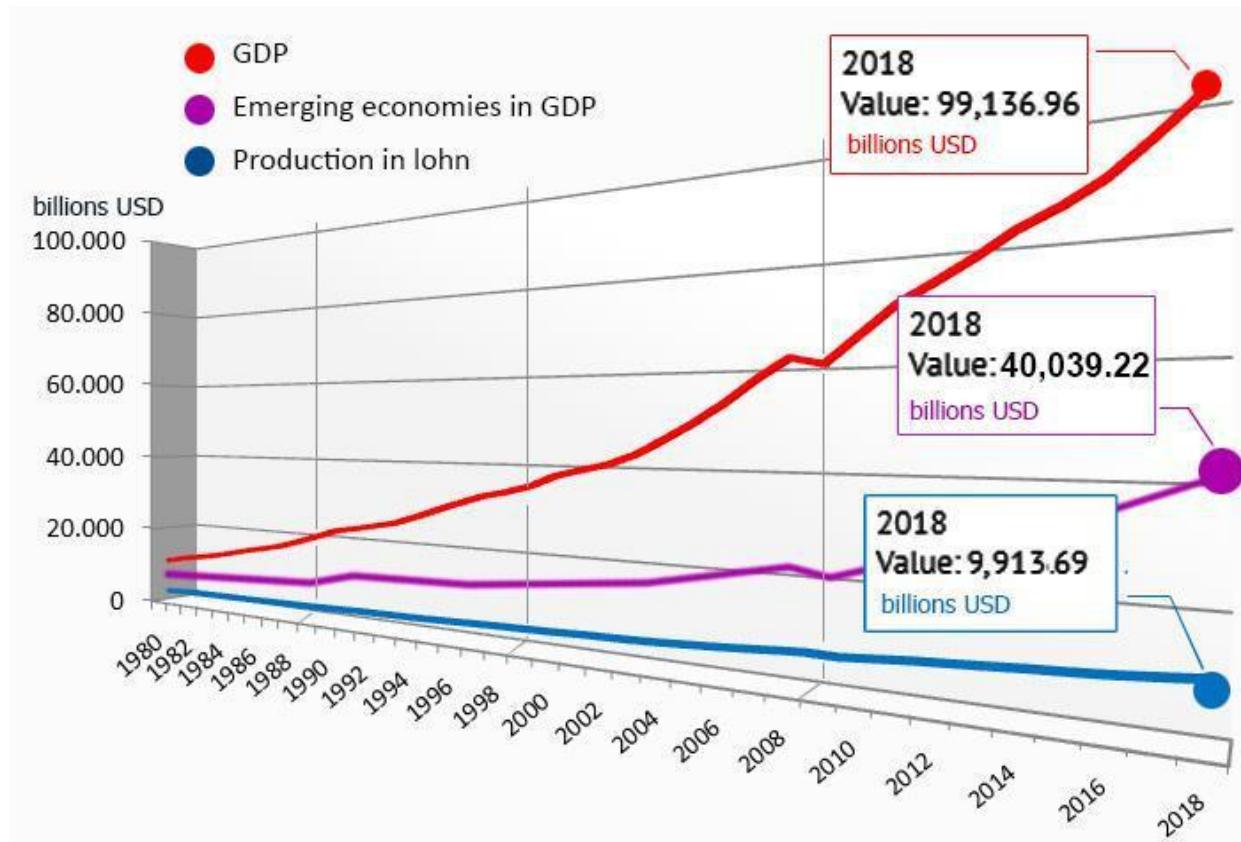


INDUSTRIAL GLOBAL REPORT

Global industrial production is concentrated in highly-engineered countries that are the largest owners of international brands and the largest consumers of goods on one hand and on the other hand in emerging economies where the main attractiveness is related to the low production costs. Low production costs are the result of several factors with separate or simultaneous action, namely labor cost, proximity of basic raw material, low electricity and water price, permissive waste management and recycling legislation, cheap infrastructure or tax incentives that stimulate and protect foreign investments.

Emerging countries are responsible today for 40% of GDP, which in absolute figures means 40,000 billion USD per year, of which at least 25% represents lohn industrial production for major international brands, especially in fashion, appliance, electronics, ship and boat building or metal industry.



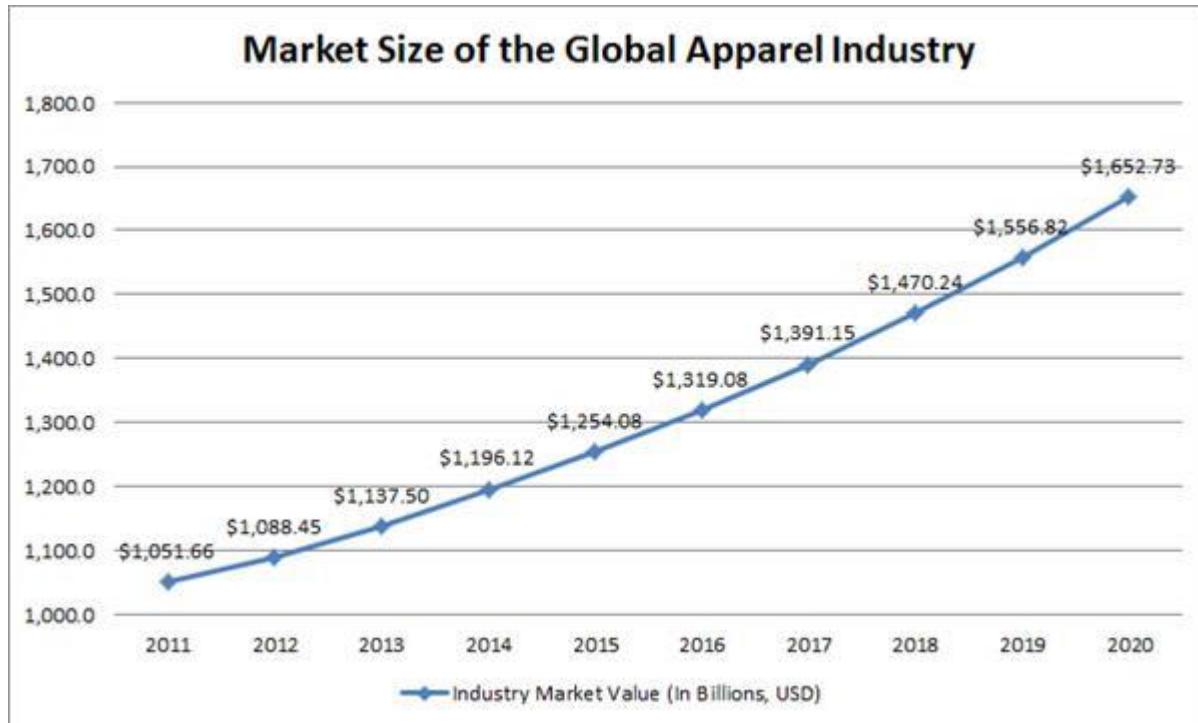
The industries that most exploit the low production costs in emerging countries are manufacturing industries or industries that develop near inexpensive natural resources.

FASHION INDUSTRY, ESTIMATED TO 3000 BILLIONS USD IN 2018 INCLUDES:

<https://fashionunited.com/global-fashion-industry-statistics>

<https://www.mckinsey.com/industries/retail/our-insights/the-state-of-fashion>

1. Apparel - 1470 billions USD



<https://fee.org/articles/fast-fashion-has-changed-the-industry-and-the-economy/>

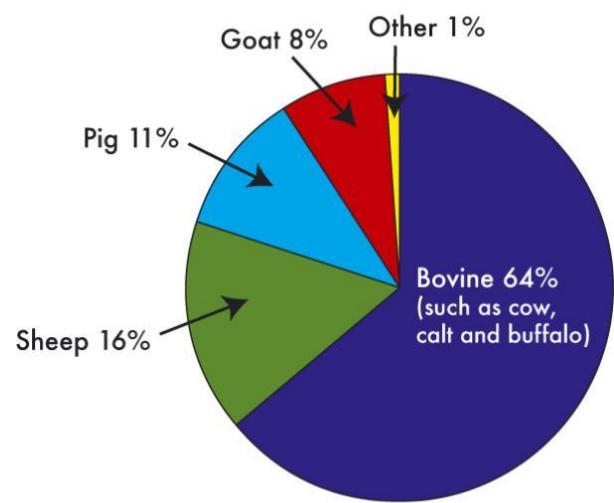
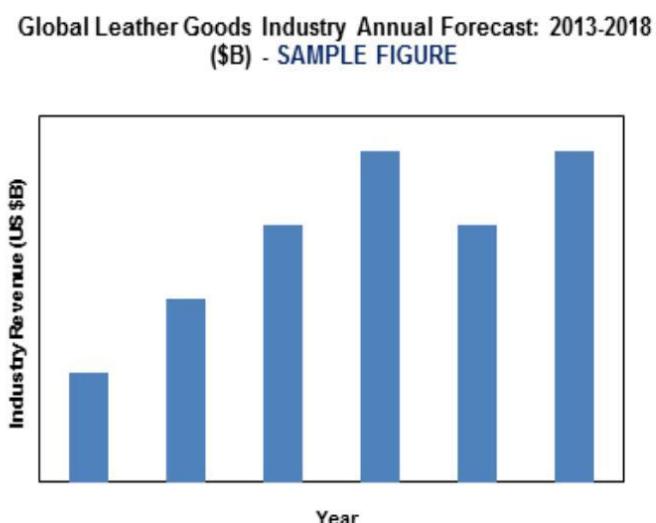
<https://www.shopify.com/enterprise/ecommerce-fashion-industry>

<https://edgexpo.com/fashion-industry-waste-statistics/>

2. Footwear industry - 251 billions USD

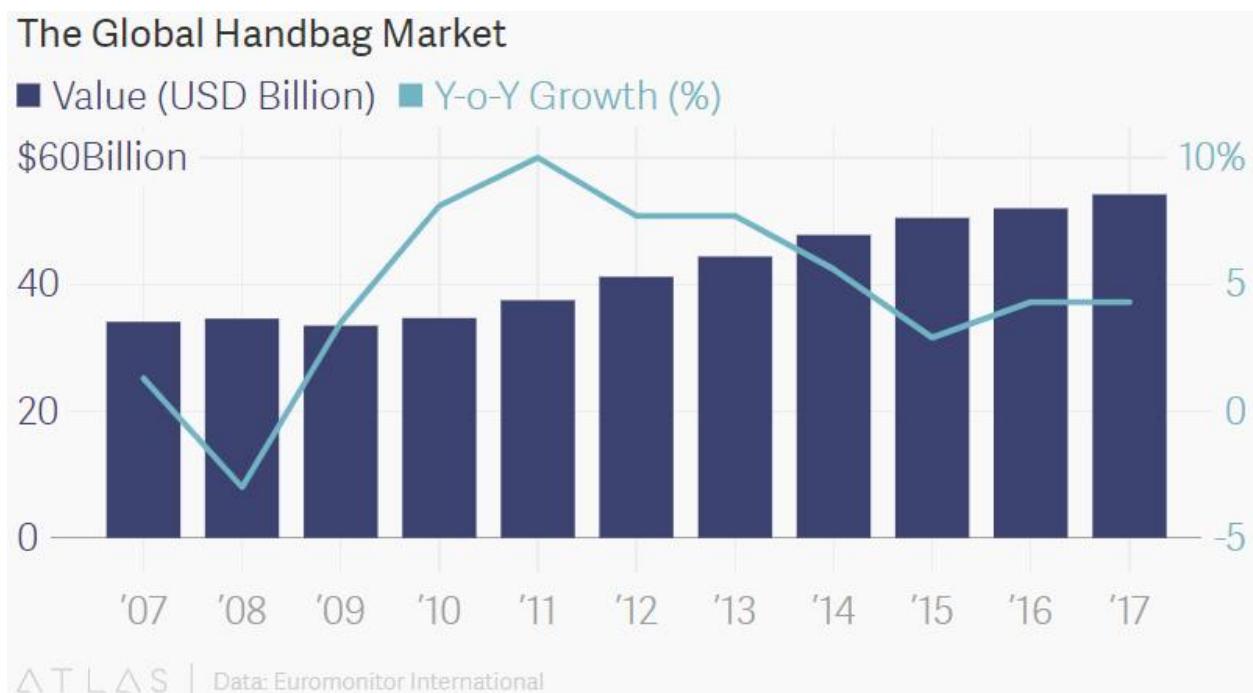


3. Leather industry - 200 billions USD



4. Handbag and Purse industry - 151 billions USD

<https://www.statista.com/outlook/358/100/bags-accessories/worldwide#market-revenue>



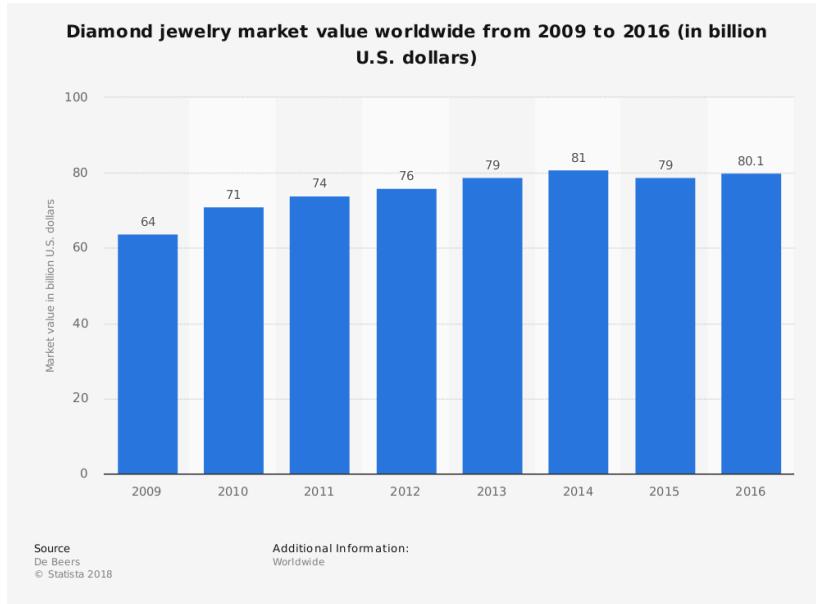
Forecasted luxury bag sales growth, 2013-18



Quartz | qz.com

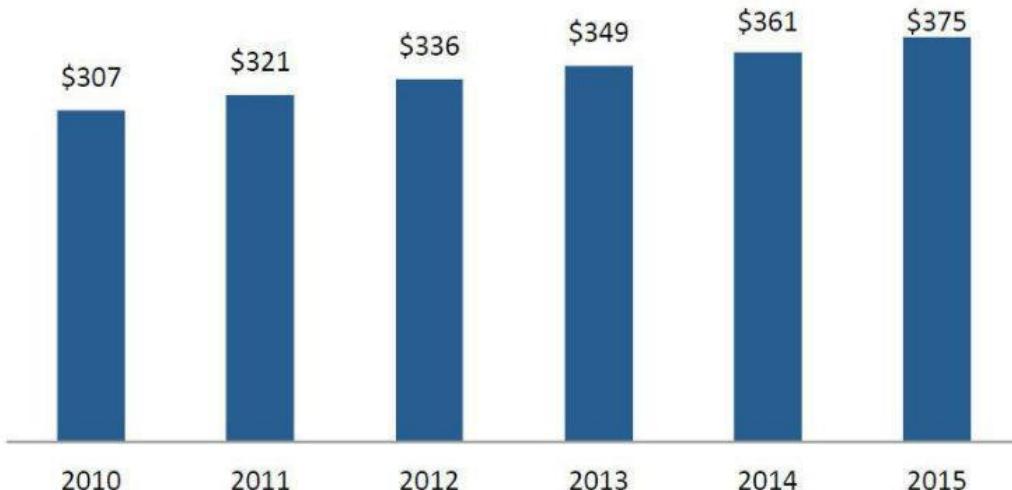
5. Jewelry industry - 350 billions USD

<https://www.bloomberg.com/professional/blog/global-jewelry-market-poised-grow-gold-demand-falls/>



6. Cosmetics industry-532 billions USD in 2018

Figure 2. Estimated Global Cosmetics Market Size (USD Bil., at Constant Exchange Rates)



Market size at retail selling prices. Consists of skincare, haircare, makeup, fragrances and hygiene products. Excludes soaps, oral hygiene, razors and blades.

Source: L'Oréal/Fung Global Retail & Technology

<https://www.reuters.com/brandfeatures/venture-capital/article?id=30351>

Cosmetics industry- billions USD



Beverage industry includes:

7. Beer industry -590 billions USD in 2018

<https://globenewswire.com/news-release/2017/11/16/1194096/0/en/Global-Beer-Market-2016-2022-Industry-Trends-will-reach-USD-750-00-Billion-by-2022.html>



The Countries Spending the Most on Beer

Beer sales revenue per capita in 2017 in USD



<https://www.statista.com/chart/12508/the-countries-spending-the-most-on-beer/>

8. Wine manufacturing- 302 billions USD in 2017

<https://globenewswire.com/news-release/2018/04/09/1467083/0/en/Global-Wine-Market-Will-Reach-USD-423-59-Billion-by-2023-Zion-Market-Research.html>



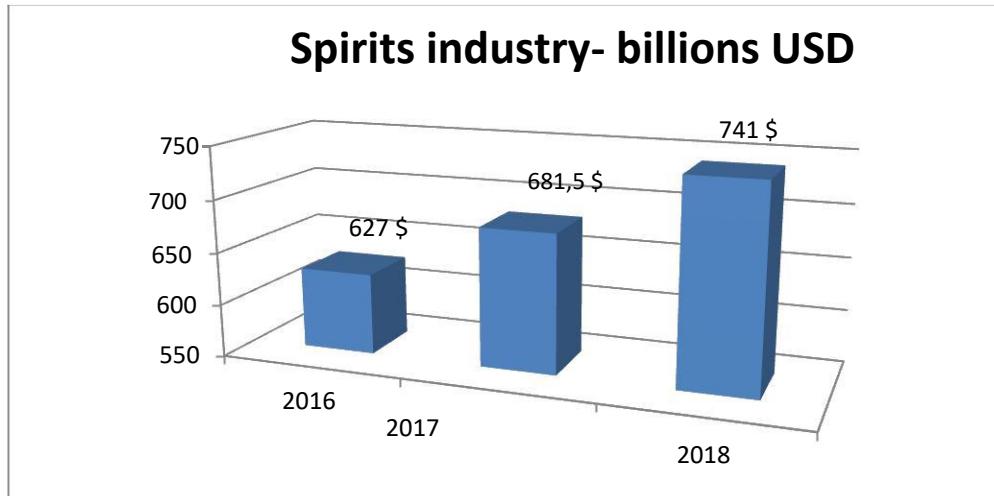
<https://www.statista.com/chart/3445/the-worlds-biggest-wine-producers/>



<https://www.statista.com/chart/6402/which-countries-drink-the-most-wine/>

9. Spirits industry - 627 billions USD in 2016 with annually growth 8,7%

<https://www.prnewswire.com/news-releases/opportunities-in-the-global-spirits-sector-analysis-of-opportunities-offered-by-high-growth-economies-300498566.html>

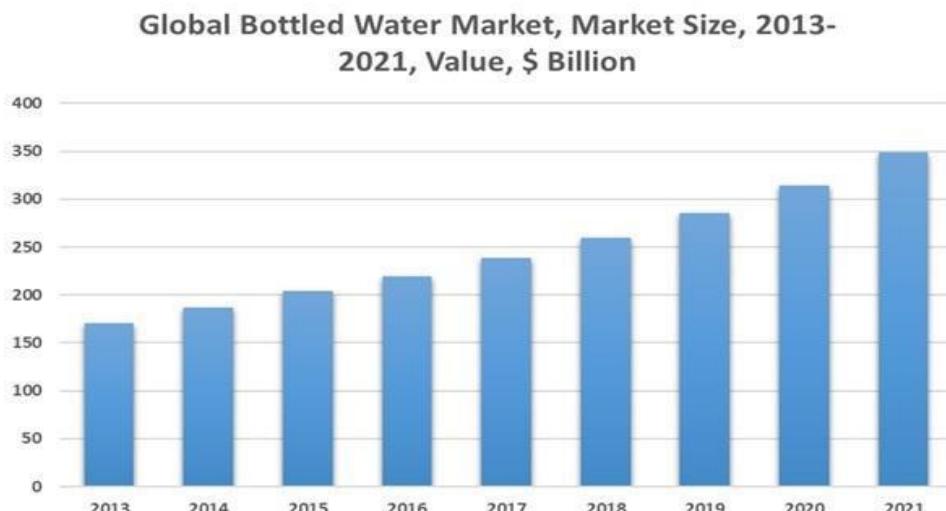


10. Non-Alcoholic Beverage Market By Product (Bottled Water, Carbonated Soft Drinks (CSD), Fruit Beverages, Functional Beverages, and Sports Drinks) - 1157 billions USD in 2017

<https://www.zionmarketresearch.com/report/non-alcoholic-beverage-market>

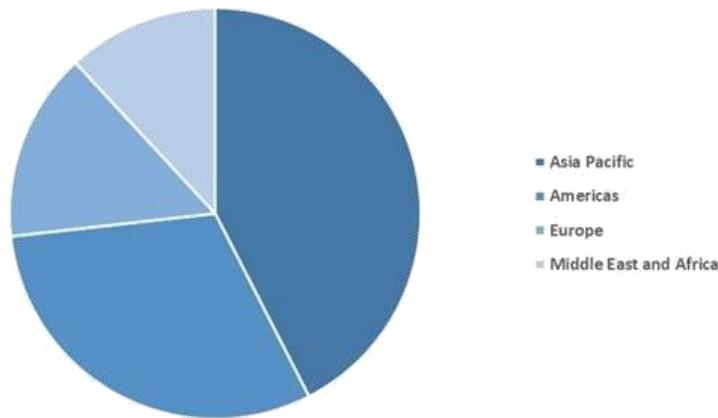
a) Bottled Water industry-260 billions USD in 2018

<https://blog.marketresearch.com/the-global-bottled-water-market-expert-insights-statistics>



Source: The Business Research Company

Global Bottled Water Market, 2017, Split By Region



Source: *The Business Research Company*

b) Carbonated Soft Drinks (CSD)-392 billions USD in 2016

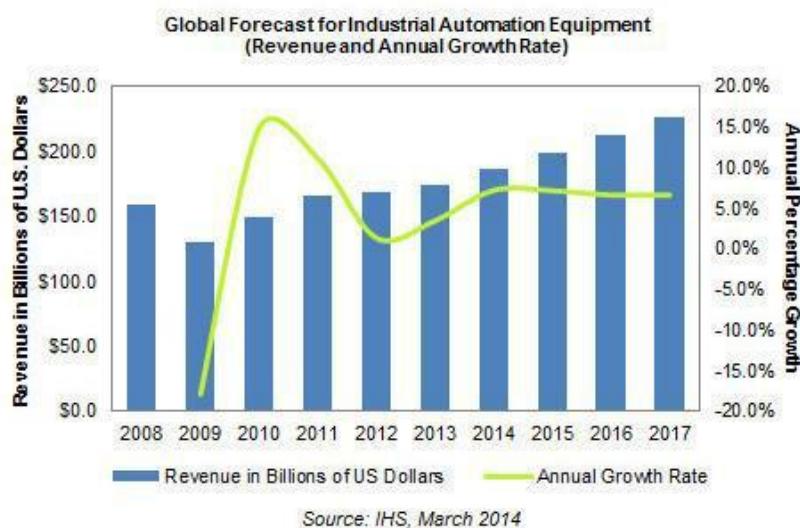
<https://www.grandviewresearch.com/industry-analysis/carbonated-soft-drinks-market>

11. Automation industry -217 billions USD in 2017

<https://www.statista.com/statistics/257170/global-automation-market-revenue-by-end-market/>

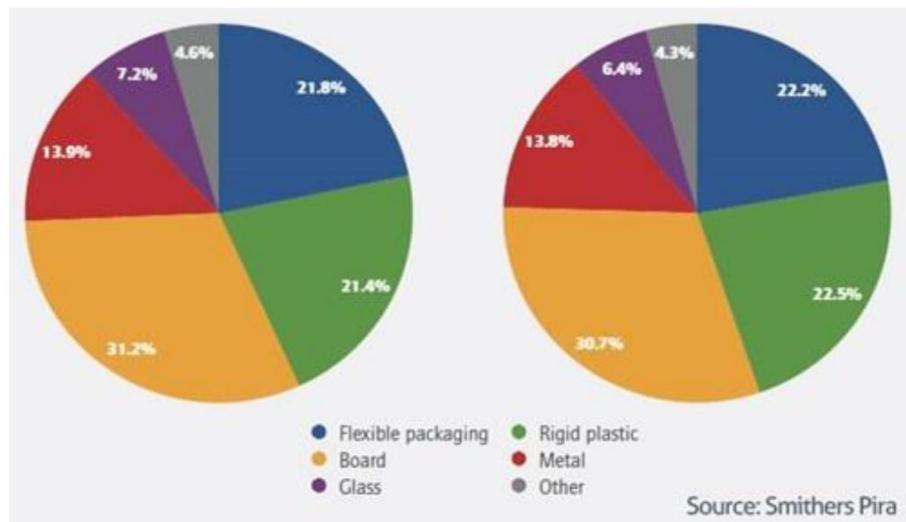
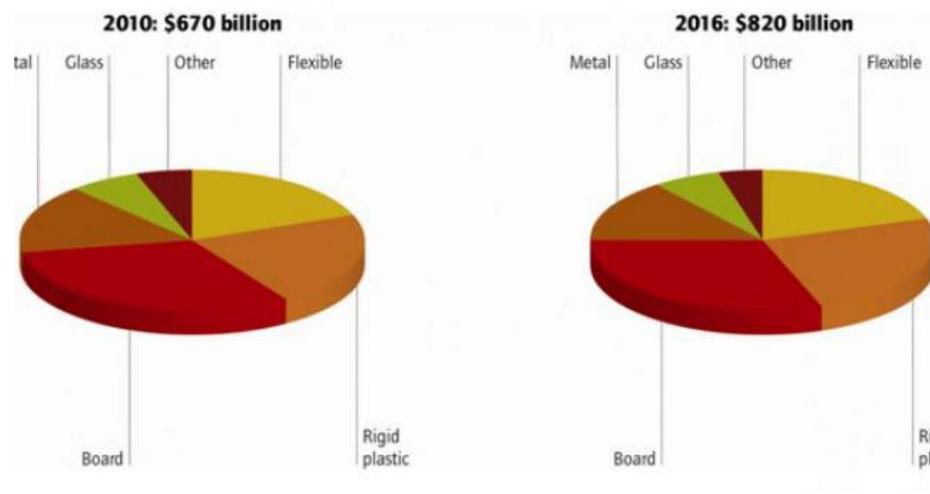
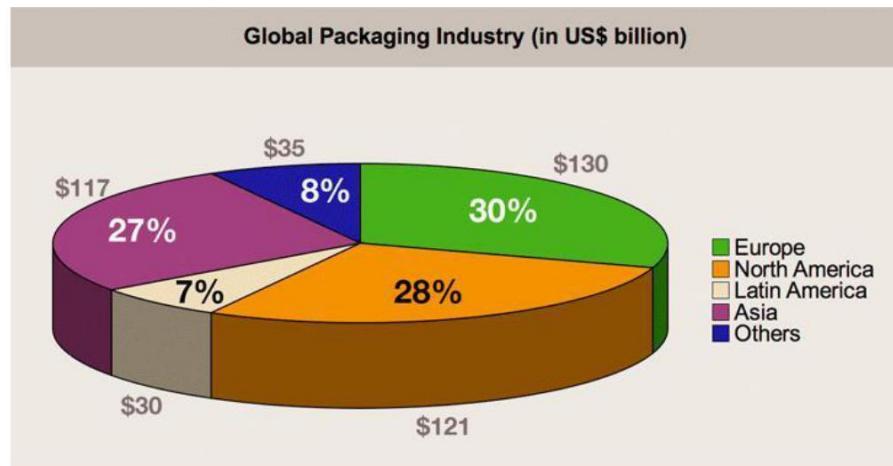
<https://www.mordorintelligence.com/industry-reports/global-factory-automation-and-industrial-controls-market-industry>

<https://news.ihsmarkit.com/press-release/design-supply-chain/industrial-automation-equipment-see-stronger-growth-2014-after-two>



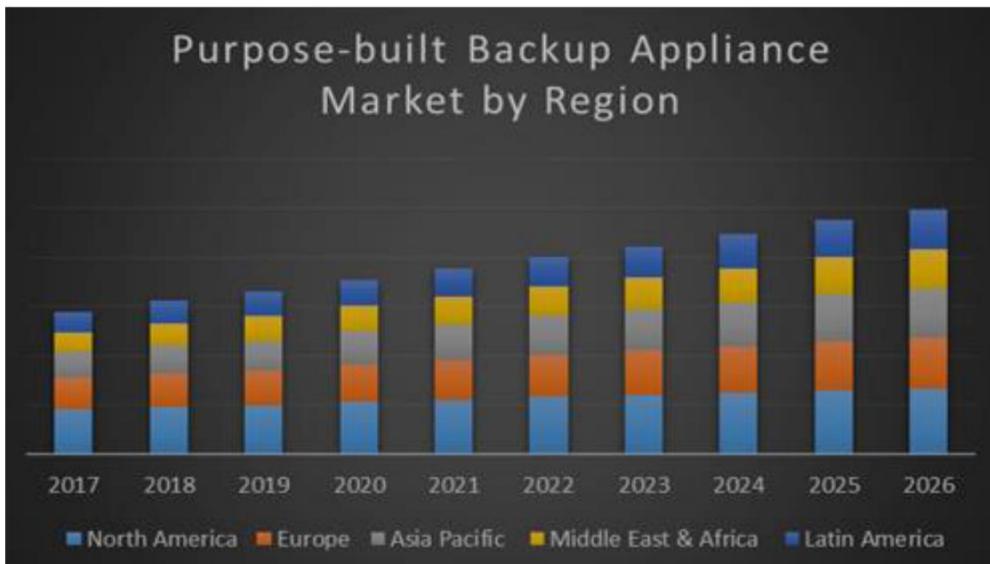
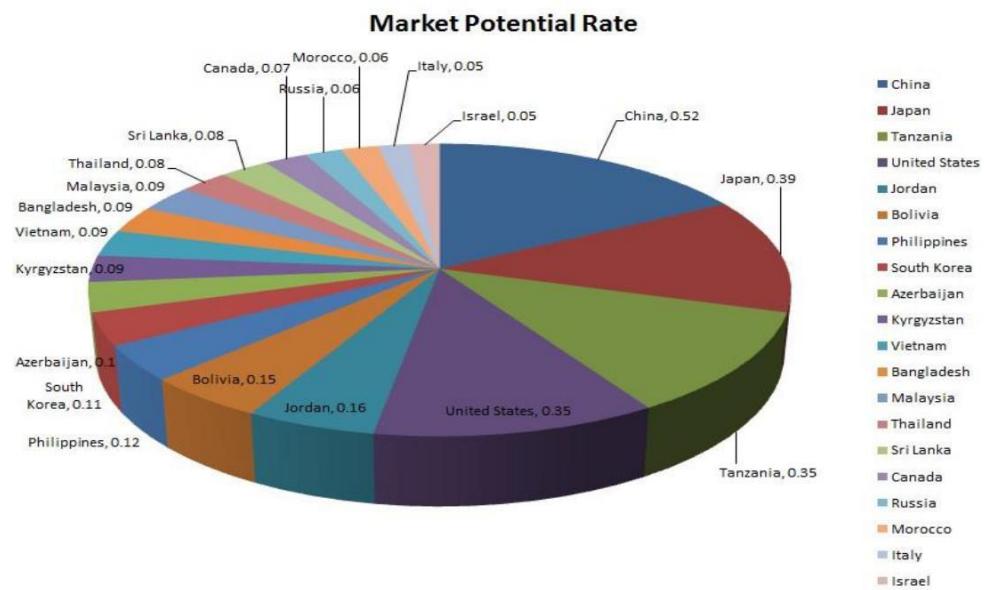
12. Packaging industry-1000 billions USD

<https://www.smitherspira.com/resources/2016/february/global-packaging-material-outlooks>



13. Appliance -437 billions USD

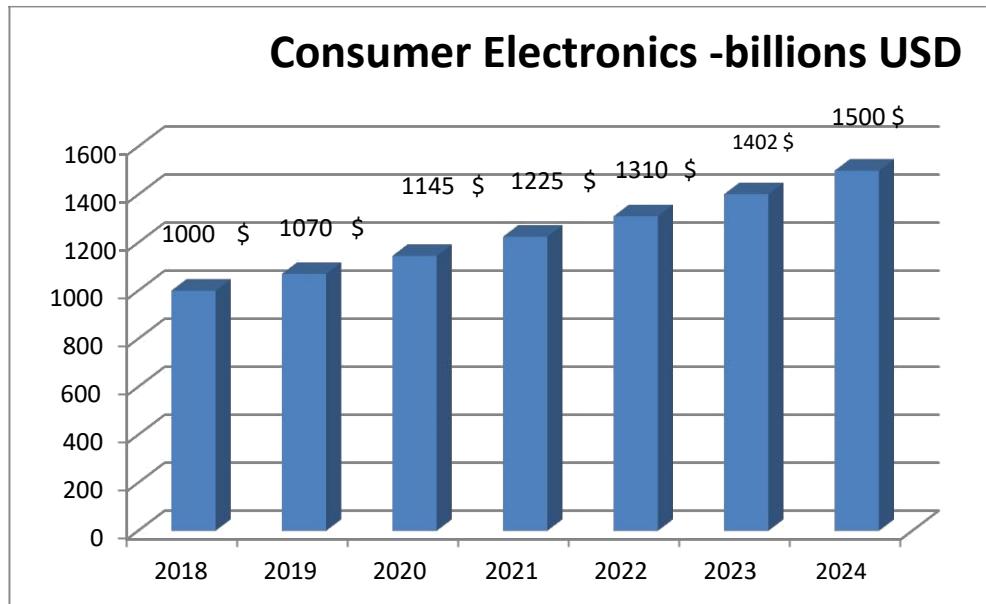
<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/household-cooking-appliance-manufacturing.html>



14. Consumer Electronics - 1000 billions USD

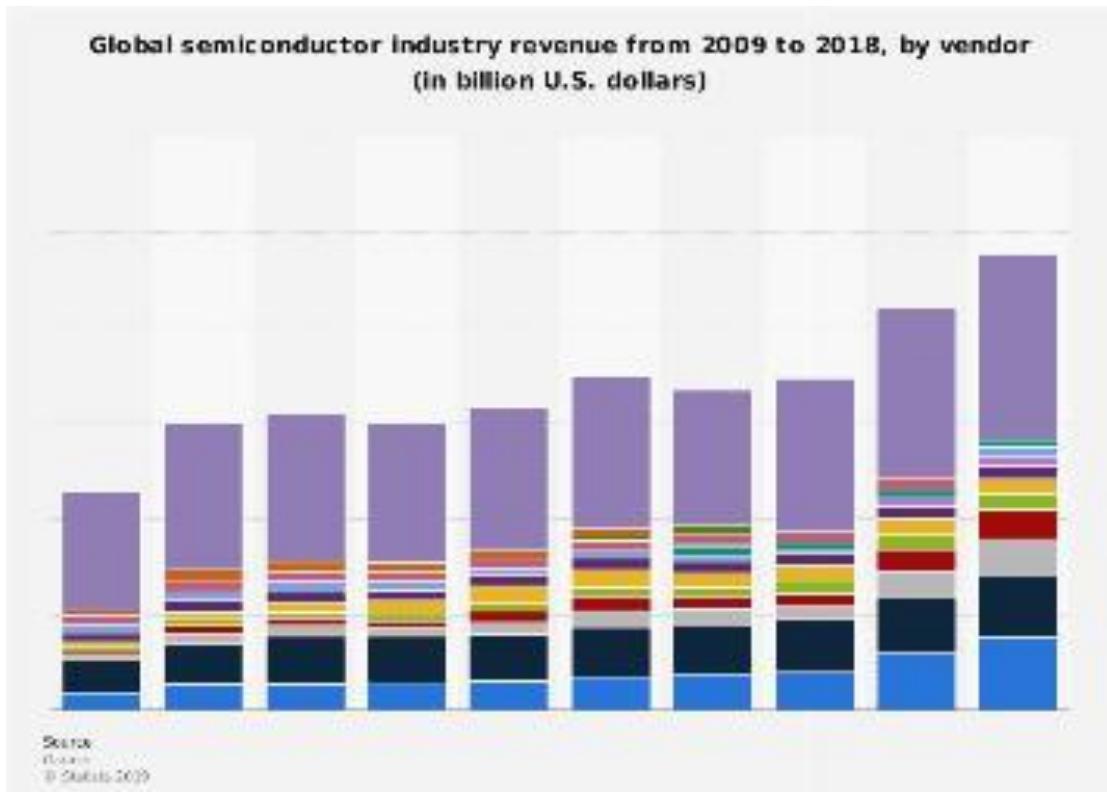
<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/consumer-electronics-manufacturing.html>

<https://globenewswire.com/news-release/2018/01/29/1313412/0/en/Consumer-Electronics-Market-to-hit-1-500bn-by-2024-Global-Market-Insights-Inc.html>

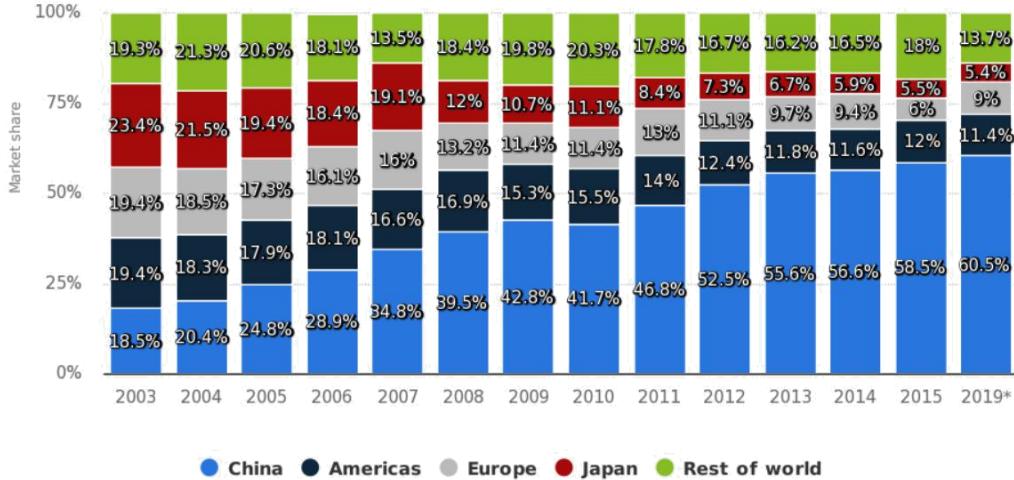


15. Semiconductor and Electronic Parts-540 billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/semiconductor-electronic-parts-manufacturing.html>



Semiconductor consumption market share worldwide, from 2003 to 2019, by region



● China ● Americas ● Europe ● Japan ● Rest of world

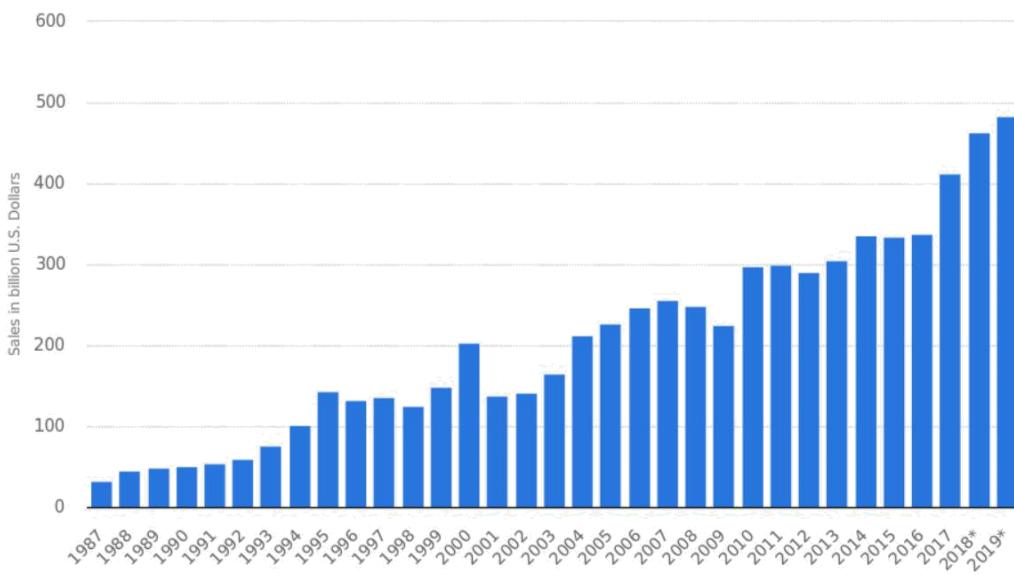
Sources

PwC; SIA; IC Insights; Gartner; CCID Consulting
© Statista 2018

Additional Information:

Worldwide; Europe; China; Japan; 2003 to 2015

Semiconductor sales revenue worldwide from 1987 to 2019 (in billion U.S. dollars)



Sources

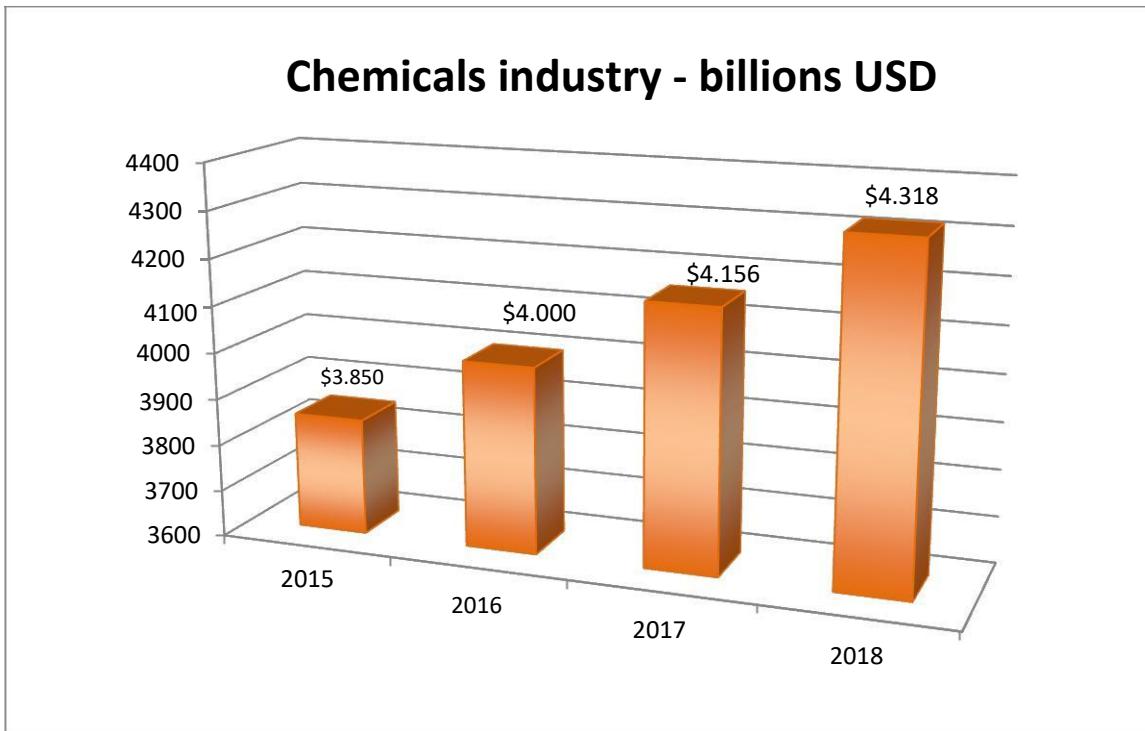
WSTS; SIA
© Statista 2018

Additional Information:

Worldwide; WSTS; 1987 to 2017

16. Chemicals industry - 3850 billions USD in 2015 with annual growth rate of 3.9%

[https://www.ey.com/Publication/vwLUAssets/ey-chemicals-trends-analyzer/\\$FILE/ey-chemicals-trends-analyzer-may-2017.pdf](https://www.ey.com/Publication/vwLUAssets/ey-chemicals-trends-analyzer/$FILE/ey-chemicals-trends-analyzer-may-2017.pdf)

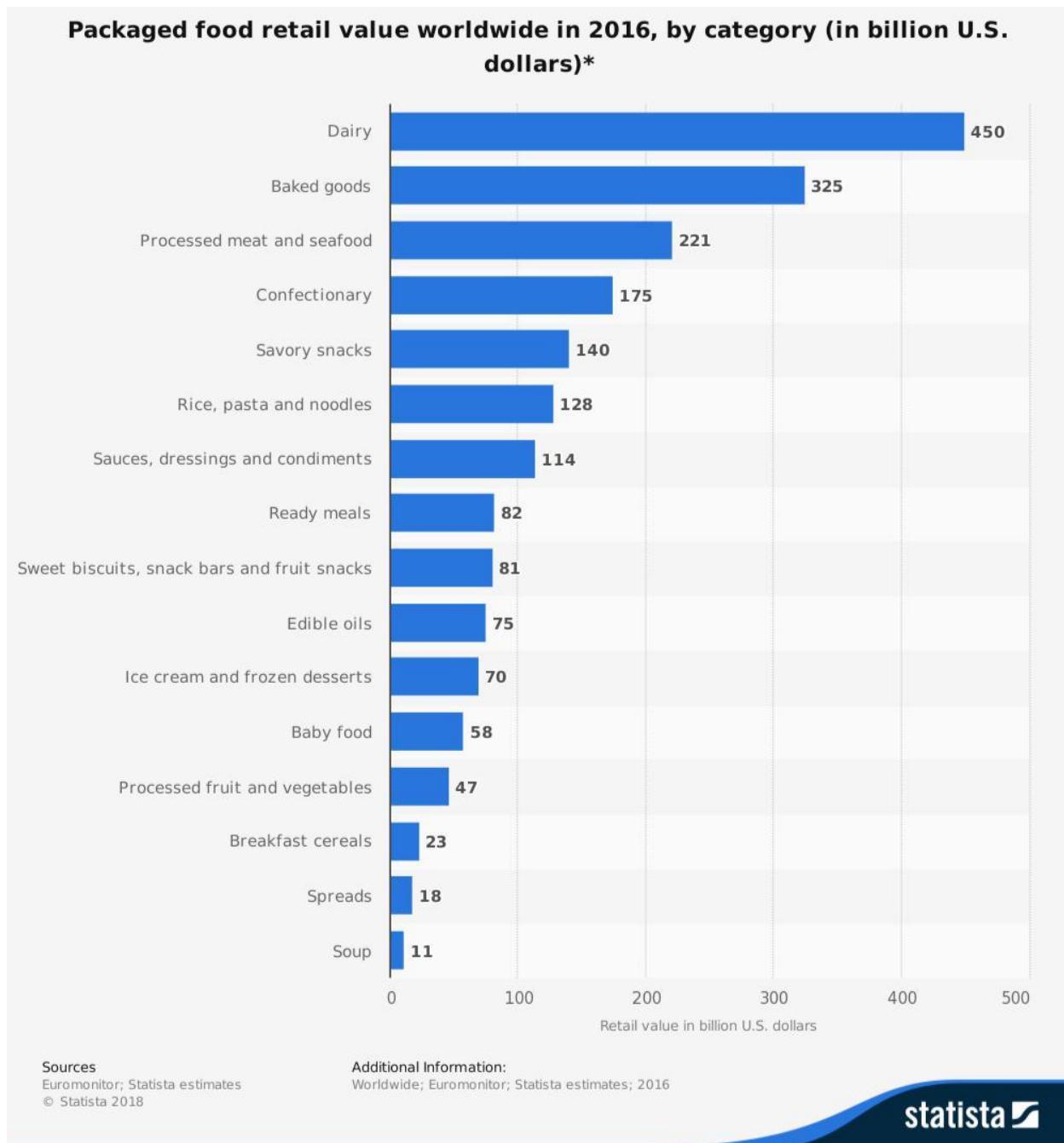


Fertilizers and agricultural chemicals -377 billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/fertilizers-agricultural-chemicals-manufacturing.html>

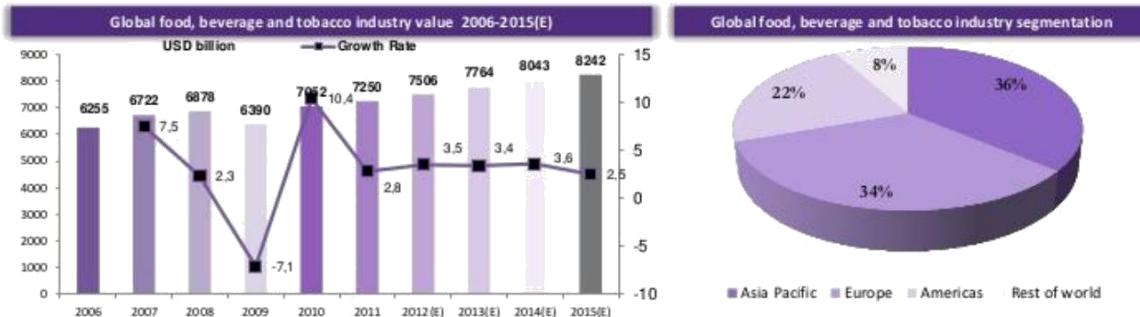
17. Food industry-8100 billions USD

<https://www.plunkettresearch.com/statistics/Industry-Statistics-Global-Food-Industry-Statistics-and-Market-Size-Overview/>



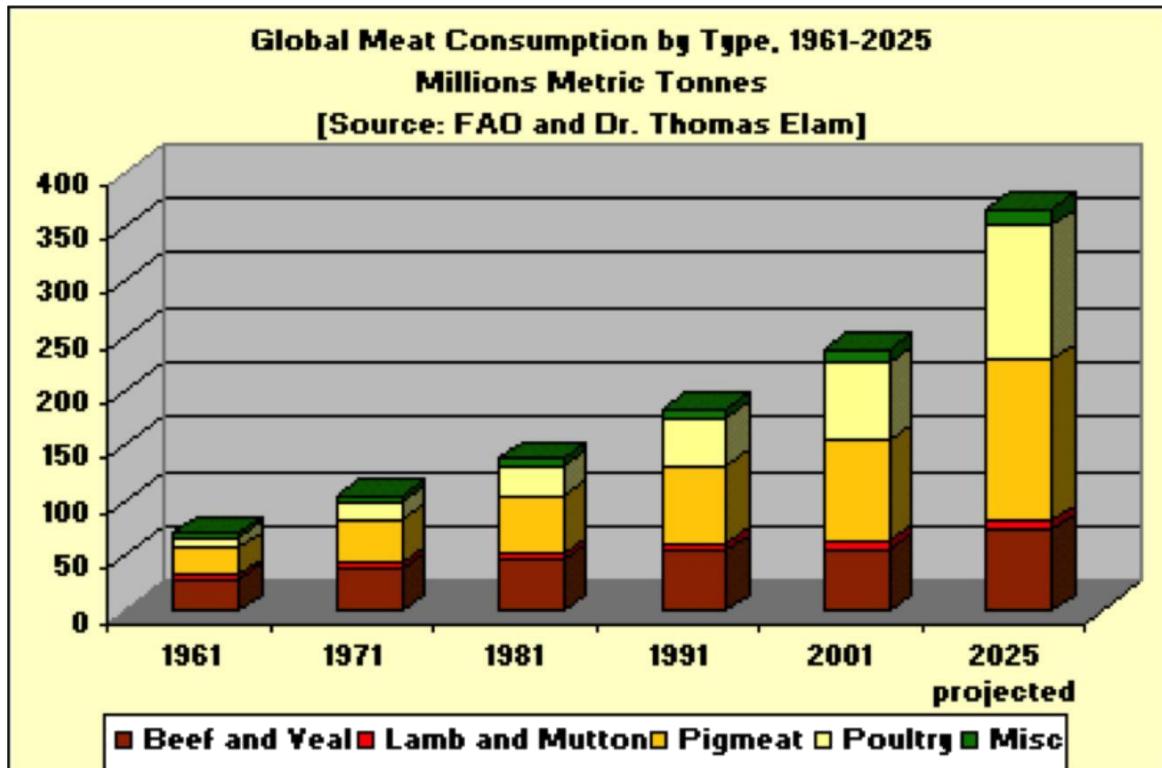
Global food, beverage and tobacco industry is projected to reach value of USD 8.2 trillion in 2015

The global food, beverage and tobacco industry is expected to grow at CAGR of 3.2% for the five year period 2010-2015. The industry is highly fragmented with leading incumbents, such as Coca-Cola, PepsiCo and Nestle, holding just over 8% of the total industry value.



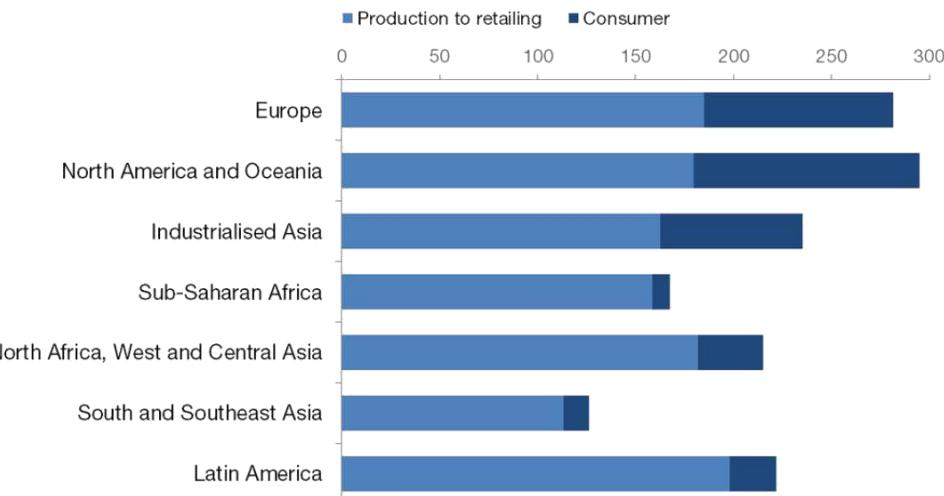
- The Asia-pacific region accounts for the largest share of global food, beverage and tobacco industry followed by Europe and the Americas.
- Factors driving growth in the F&B industry in the developing countries are different from those in the developed countries. While growing population, favourable demographics and rising income levels are expected to be key drivers in developing countries; rising health consciousness and increasing need for convenience foods are expected to drive growth in developed countries.

Sources
© 2012 Grant Thornton International Ltd. All rights reserved.
1 – Data monitor



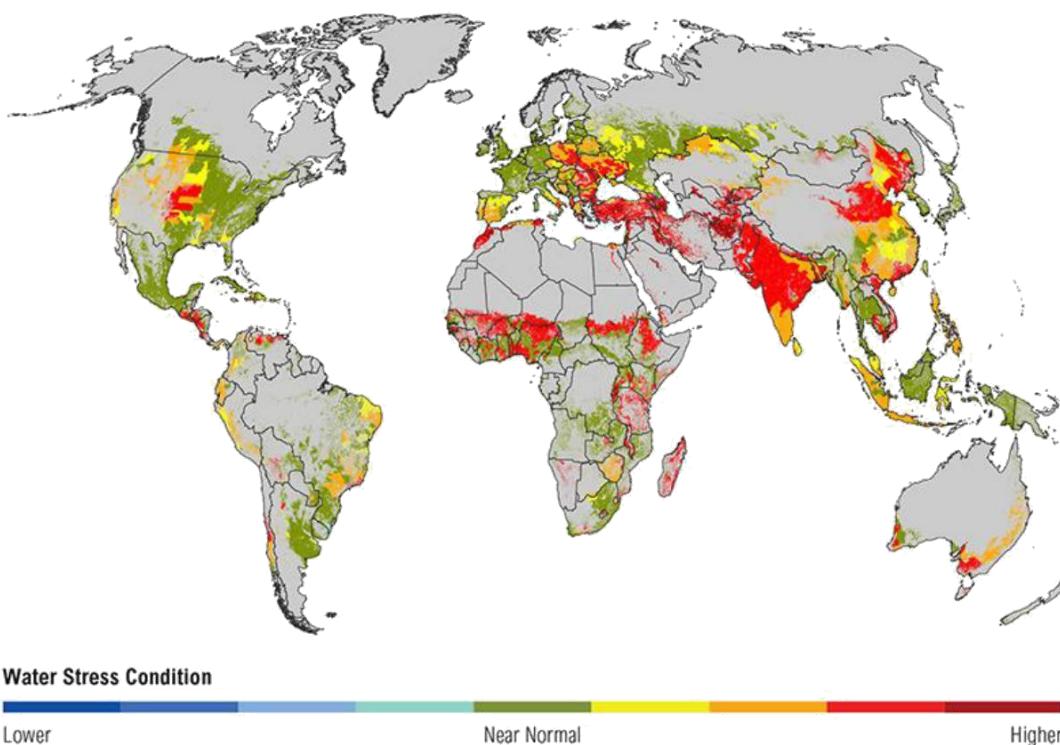
Which regions waste the most food?

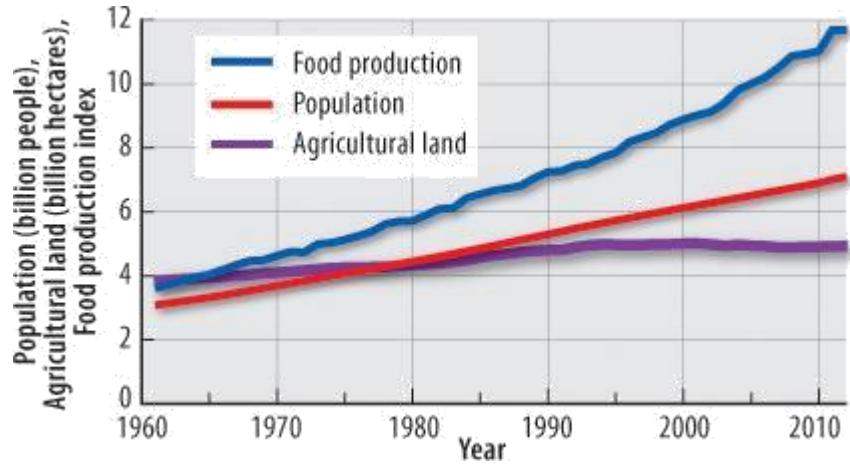
Per capita food losses and waste, kg/year



Source: The Food and Agriculture Organization of the United Nations (FAO)

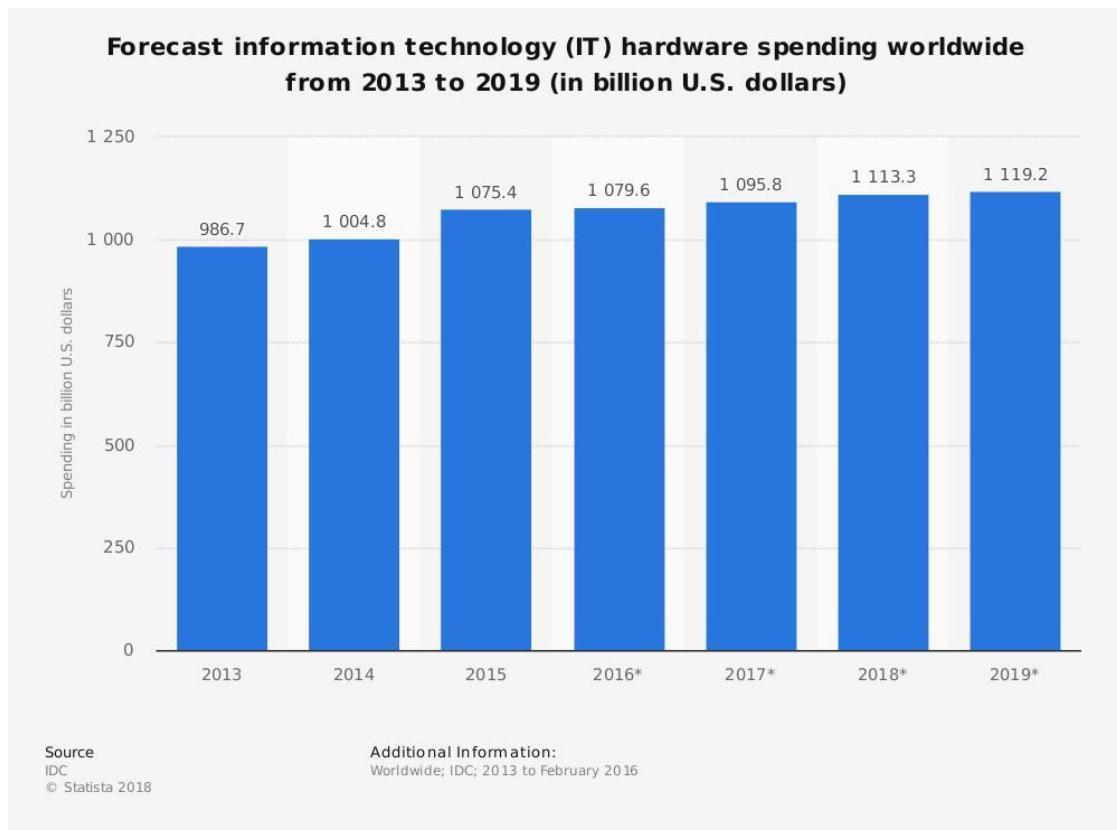
Water stress will increase in many agricultural areas by 2025 due to growing water use and higher temperatures (based on IPCC scenario A1B)



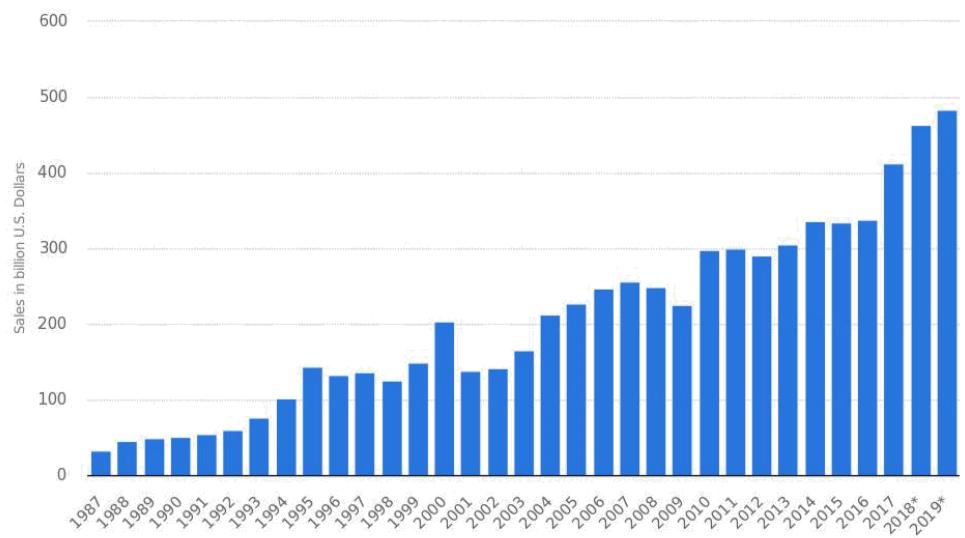


18. Computer hardware industry- 1113 billions USD in 2018

<https://www.statista.com/statistics/422802/hardware-spending-forecast-worldwide/>



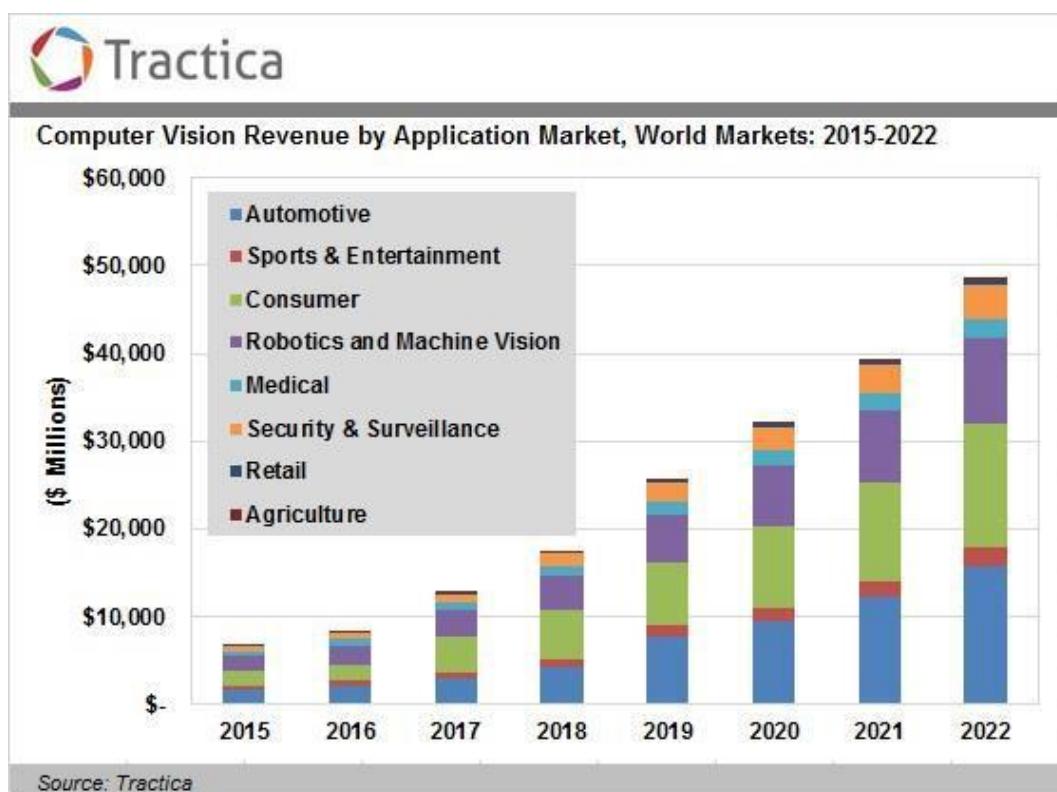
Semiconductor sales revenue worldwide from 1987 to 2019 (in billion U.S. dollars)



Sources
WSTS; SIA
© Statista 2018

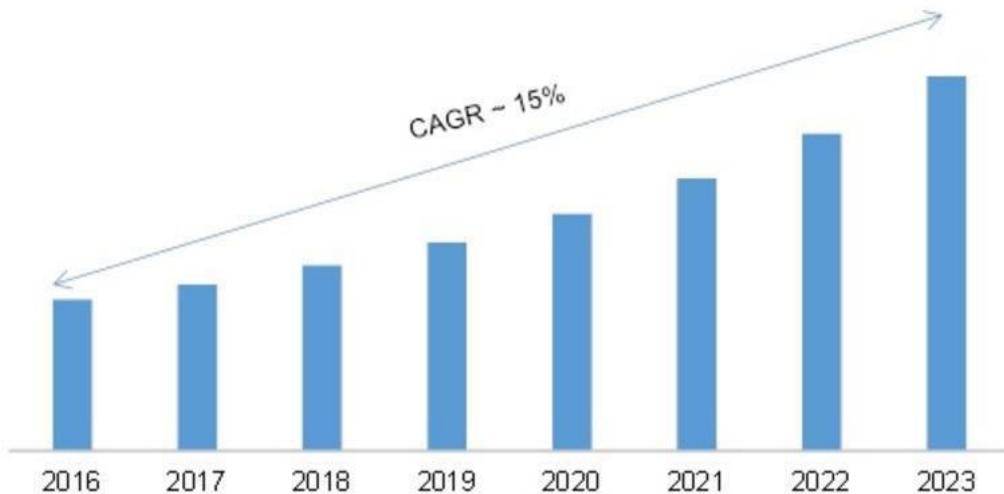
Additional Information:
Worldwide; WSTS; 1987 to 2017

https://venturebeat.com/wp-content/uploads/2018/04/global_games_market_2012-2021_per_segment.png?fit=400%2C225&strip=all



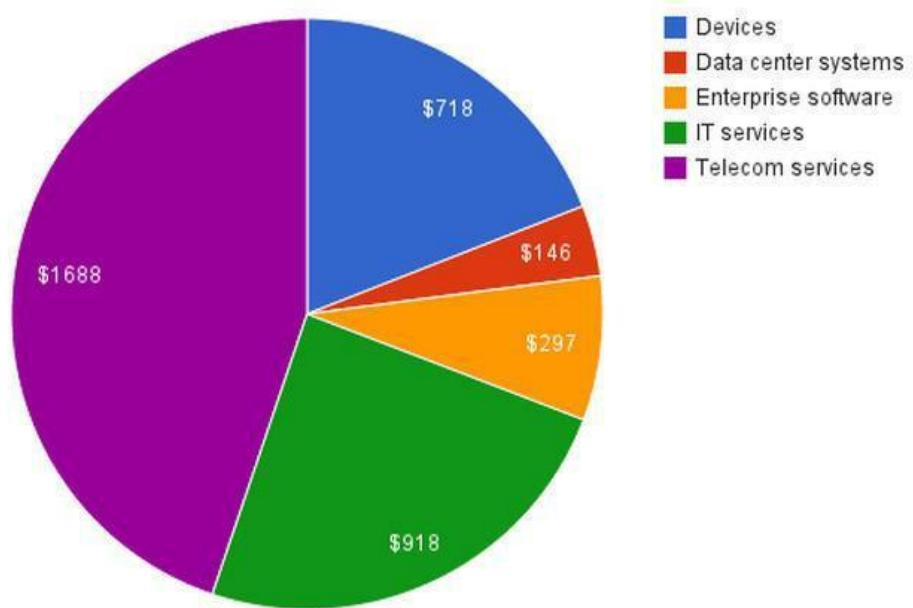
19. Software and IT services- 3500 billions USD

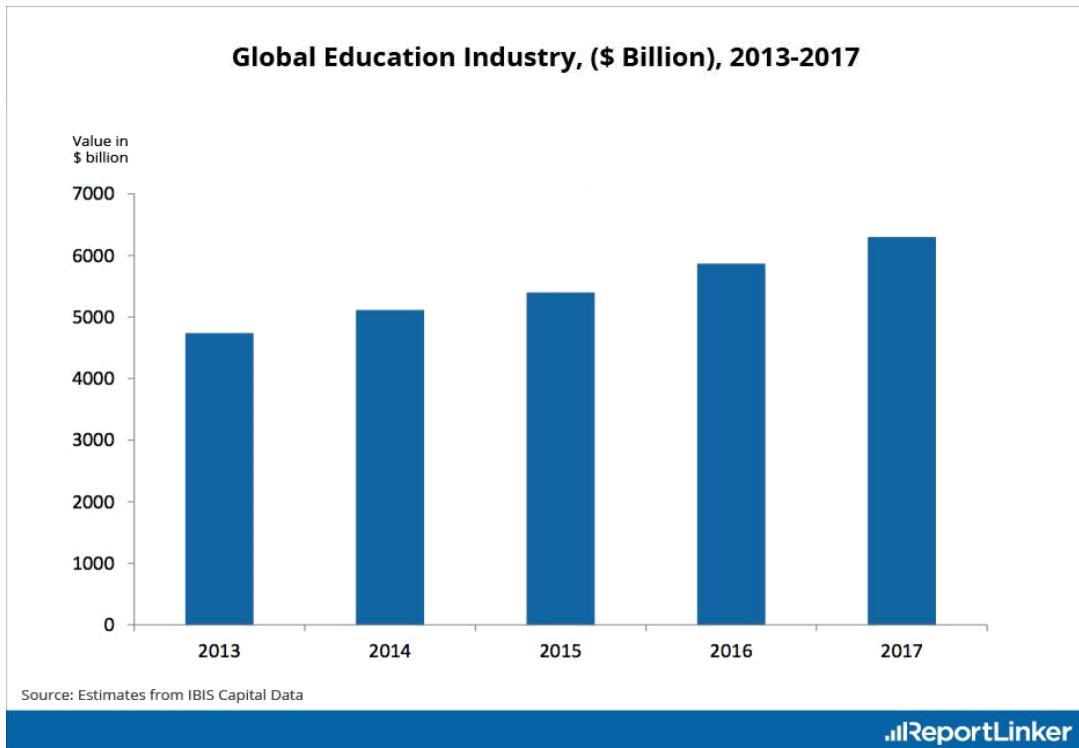
<https://www.gartner.com/newsroom/id/3482917>



<https://www.comptia.org/images/default-source/researchreports/2018-industry-outlook/slide3.png?sfvrsn=2>

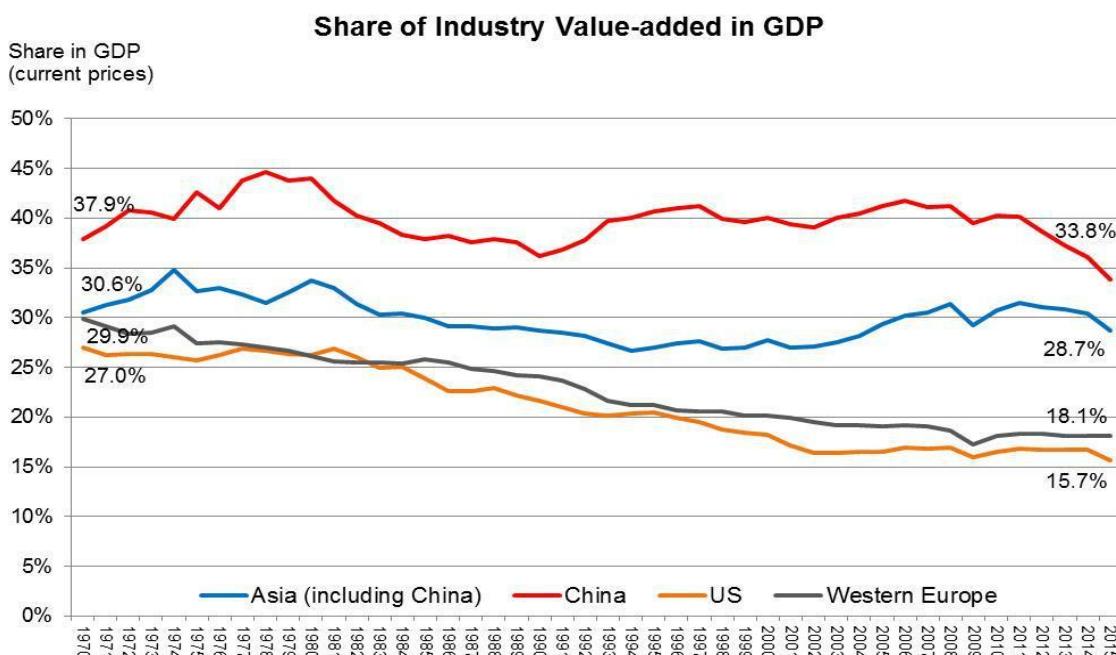
2013 worldwide IT spending forecast (US\$ billions)

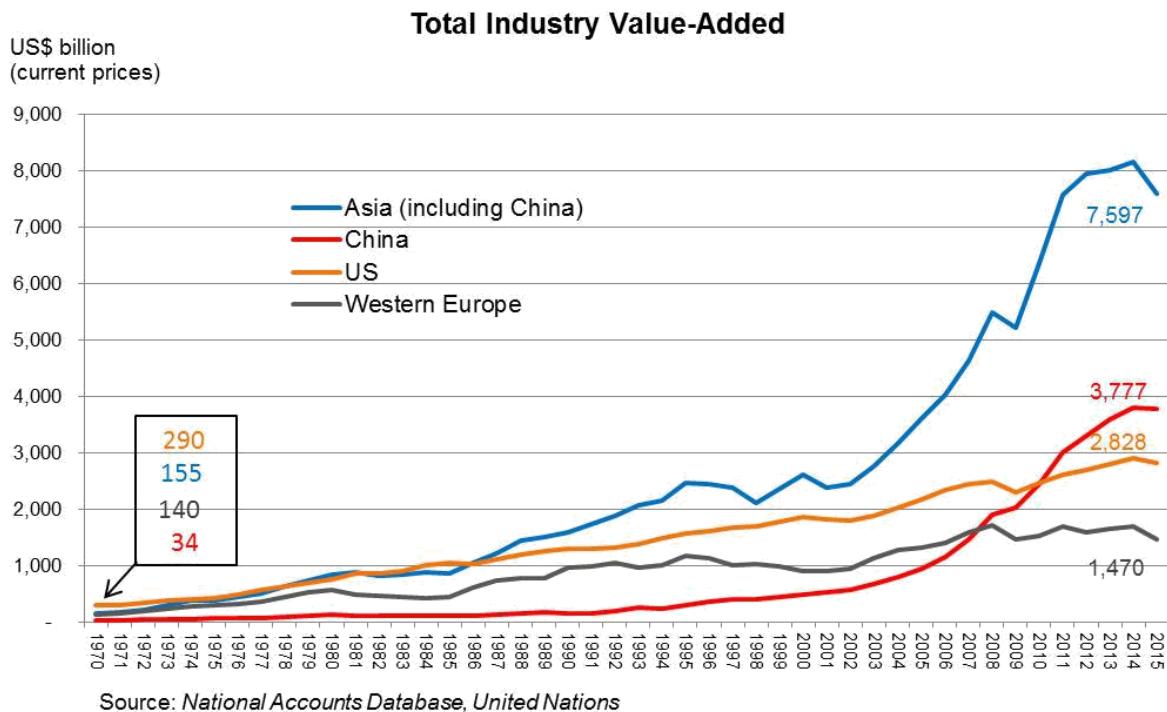




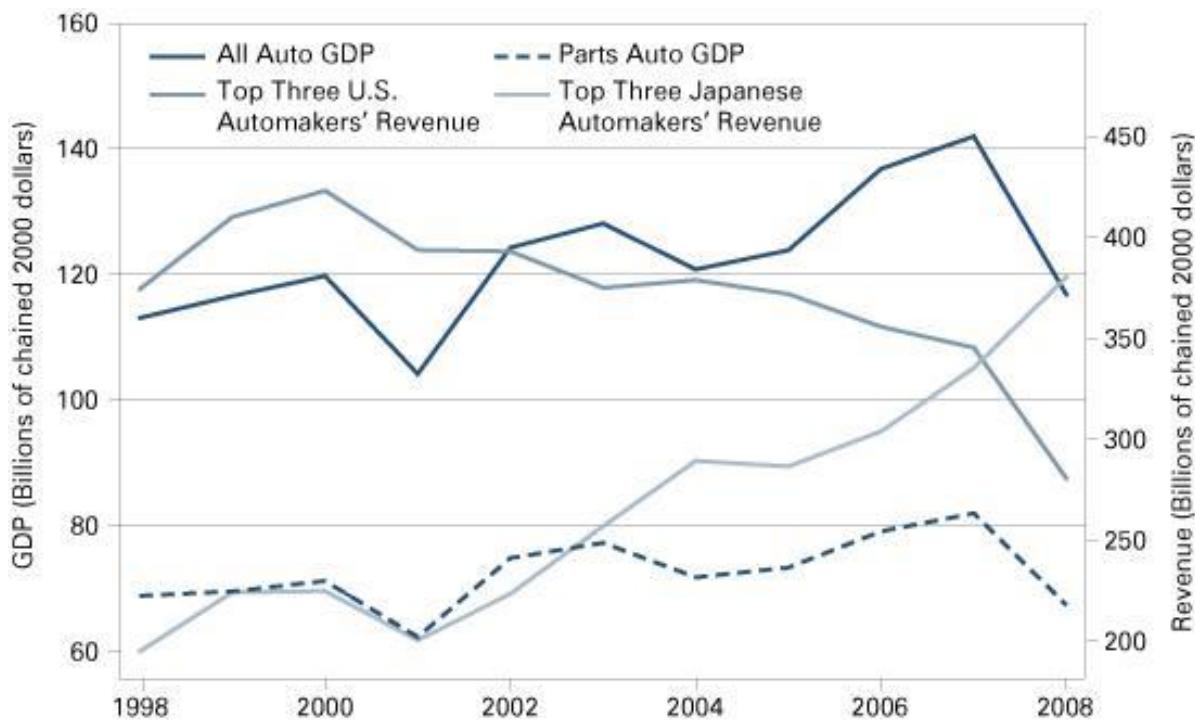
20. Autoparts&accessories industry - 2000 billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/auto-parts-accessories-manufacturing.html>





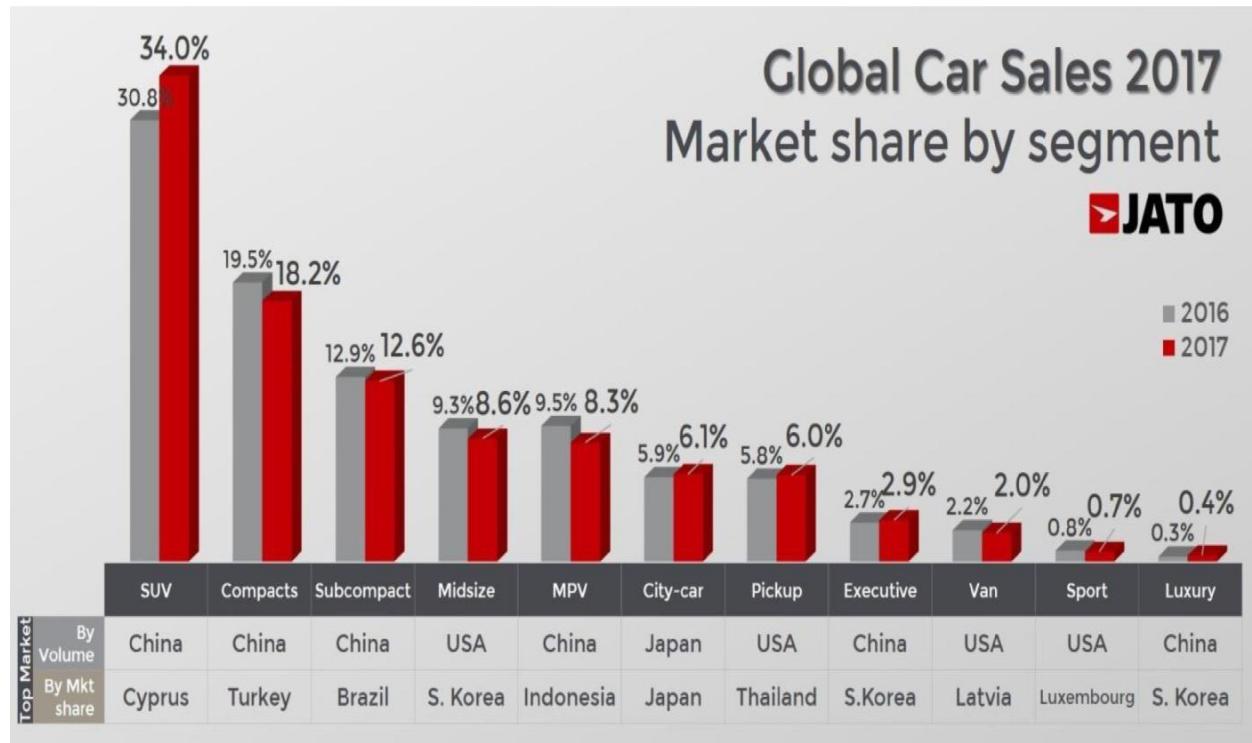
21. Automobile Engine and Parts industry-301 billions USD



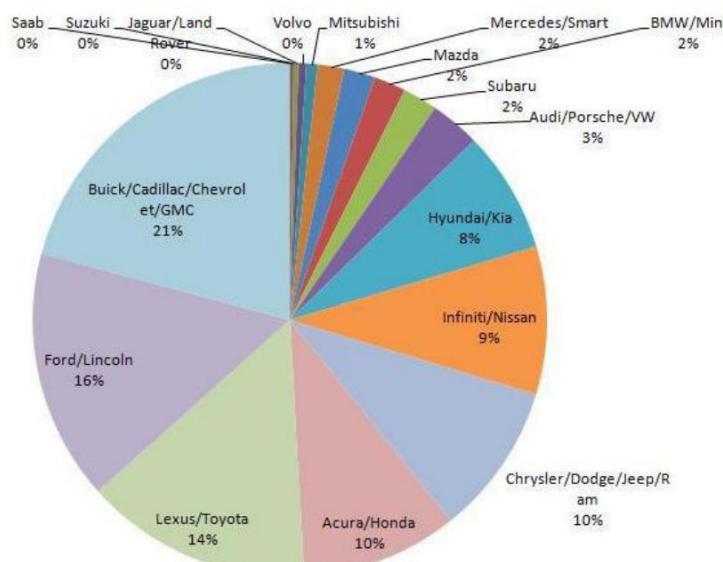
<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/automobile-engine-parts-manufacturing.html>

22. Car and Automobile industry - 2000billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/car-automobile-manufacturing.html>



Saab	546
Suzuki	1,643
Jaguar/Land Rover	3,247
Volvo	4,795
Mitsubishi	6,893
Mercedes/Smart	16,760
Mazda	19,387
BMW/Mini	19,919
Subaru	21,683
Audi/Porsche/VW	31,233
Hyundai/Kia	76,339
Infiniti/Nissan	92,370
Chrysler/Dodge/Jeep/Ram	95,102
Acura/Honda	98,059
Lexus/Toyota	141,846
Ford/Lincoln	156,626
Buick/Cadillac/Chevrolet/GMC	207,028
<i>Left out Scion</i>	

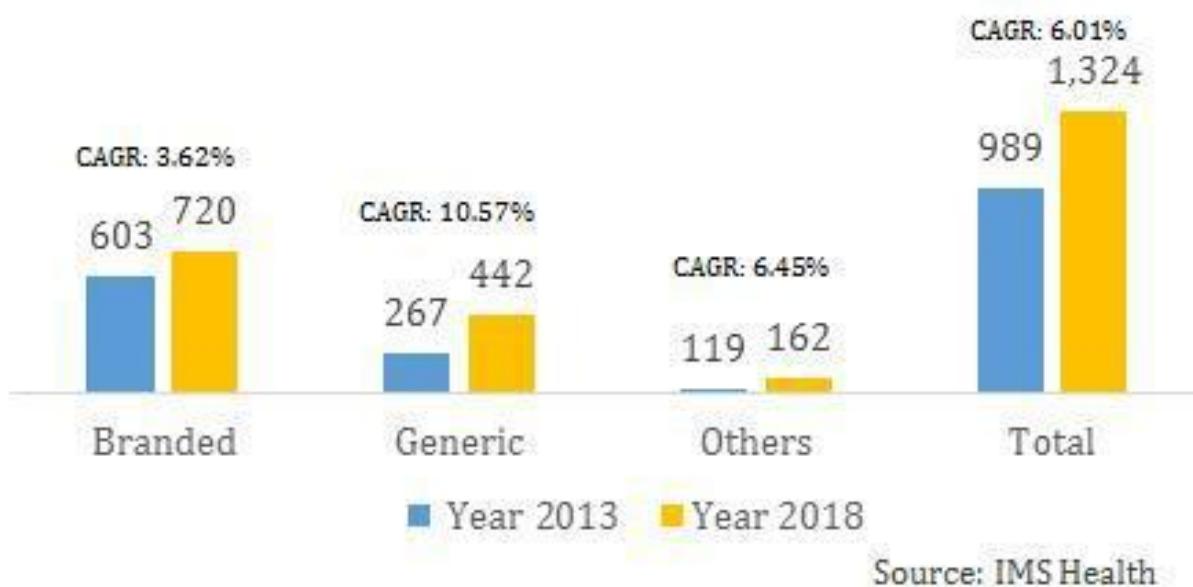




23. Pharmaceuticals-1000 billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/pharmaceuticals-medicine-manufacturing.html>

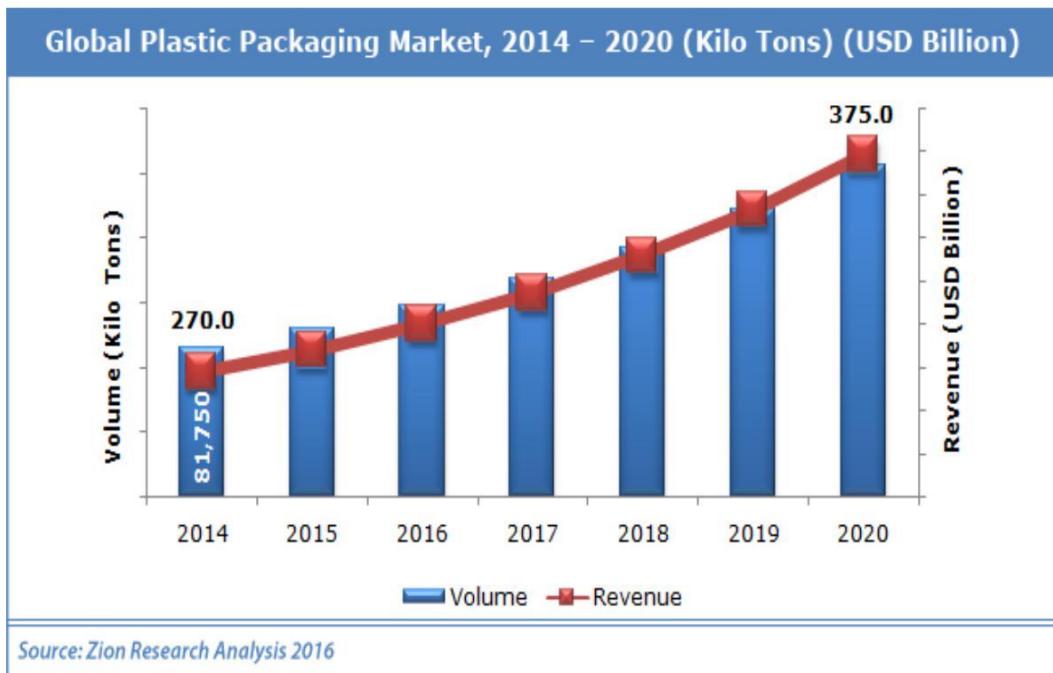
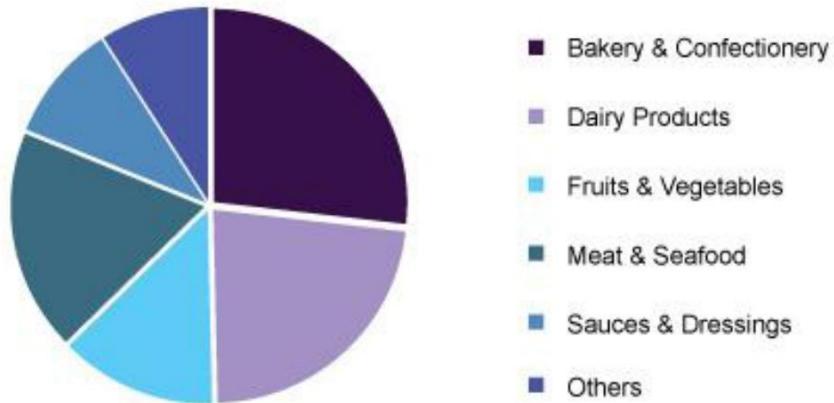
Figure 1: Global Pharmaceutical Sales (\$ billion)



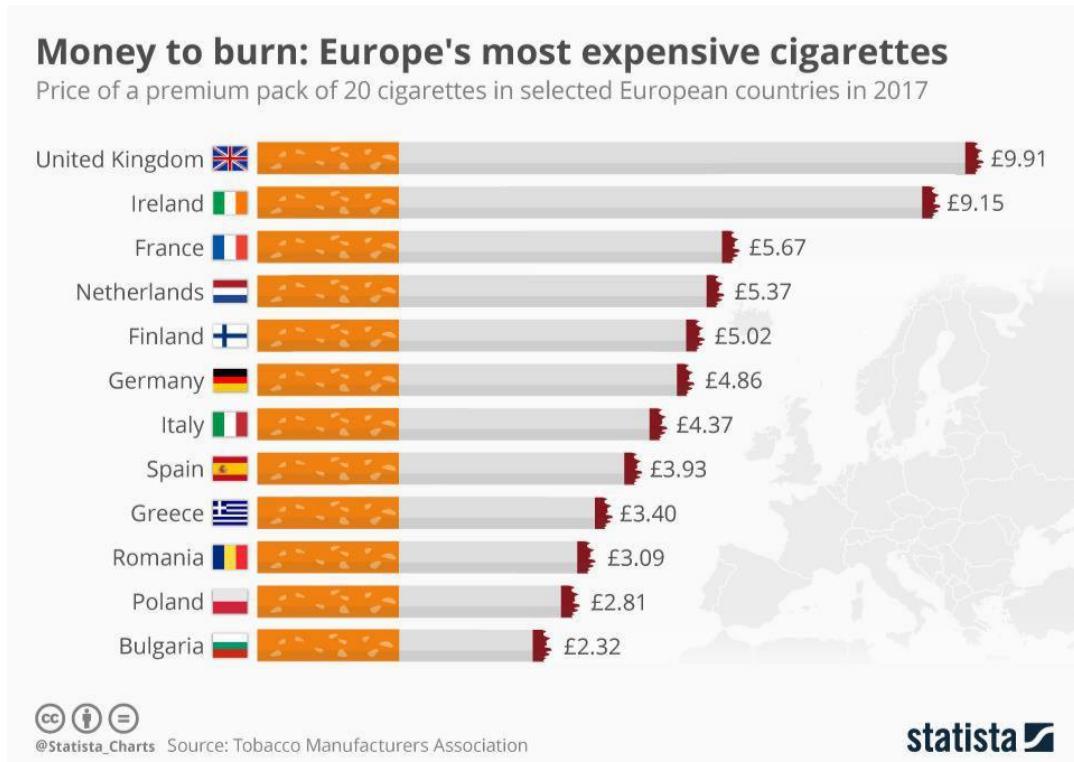
24. Plastic Product and Packaging - 488 billions USD

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/plastic-product-packaging-manufacturing.html>

Global food packaging market share, by application, 2017 (%)



25. Cigarette and Tobacco - 750 billions USD



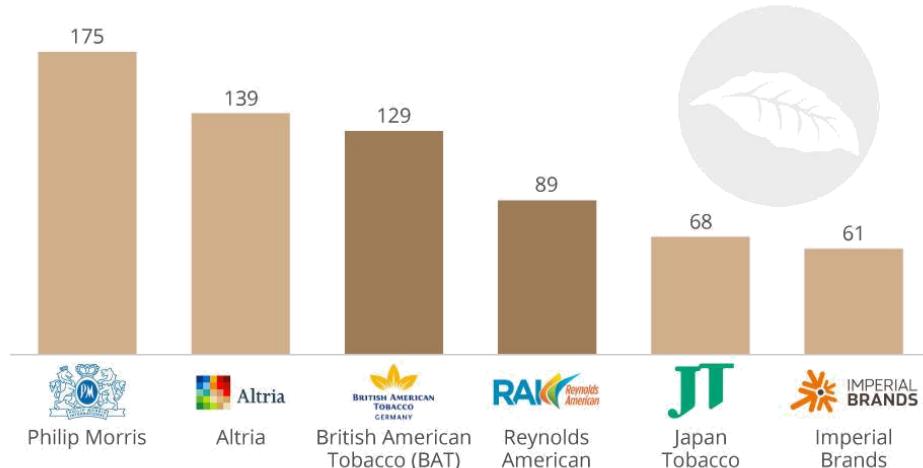
http://www.bat.com/group/sites/UK_9D9KCY.nsf/vwPagesWebLive/DO9DCKFM

<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/cigarette-tobacco-manufacturing.html>

- ② 1. Philip Morris International Inc. PM 0.05%- \$175 billion.
- ② 2. Altria Group Inc MO 1.09% - \$139 billion.
- 3. British American Tobacco - \$129 billion.
- 4. Reynolds American - \$89 billion.
- 5. Tokyo-listed Japan Tobacco Inc (TYO: 2914) - \$68 billion.
- 6. London-listed Imperial Brands PLC (LON: IMB) - \$61 billion.

Big Tobacco: BAT Bags Camel

Listed tobacco companies worldwide in 2016, based on enterprise value (in billion U.S. dollars)



Enterprise value is defined as market value of common stock + market value of preferred equity + market value of debt + minority interest - cash and investments.

@StatistaCharts

As of November 2016
Source: Seeking Alpha

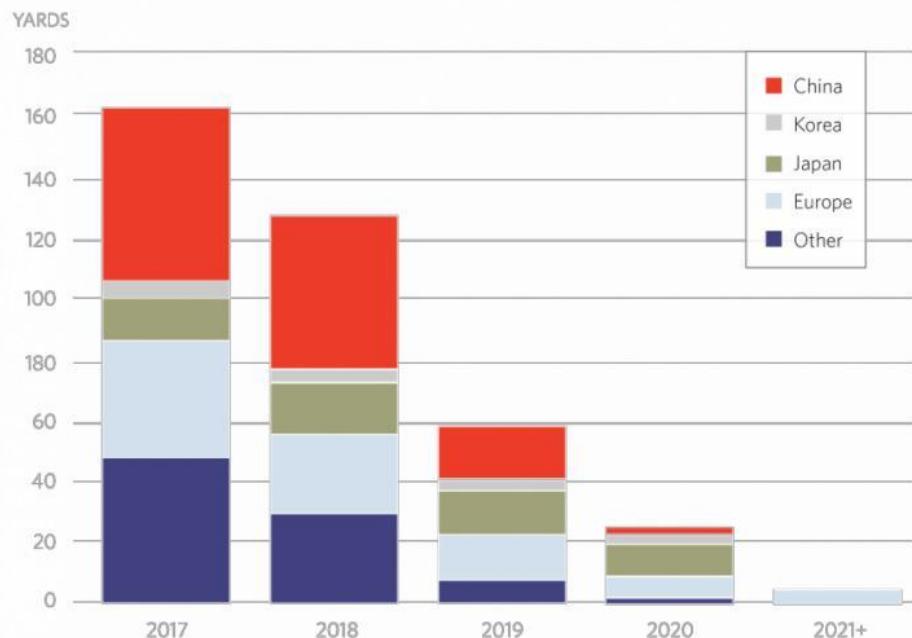
statista

<https://www.benzinga.com/news/17/01/8917180/the-biggest-big-tobacco-companies>

26. Ship and Boat Building-169 billions USD

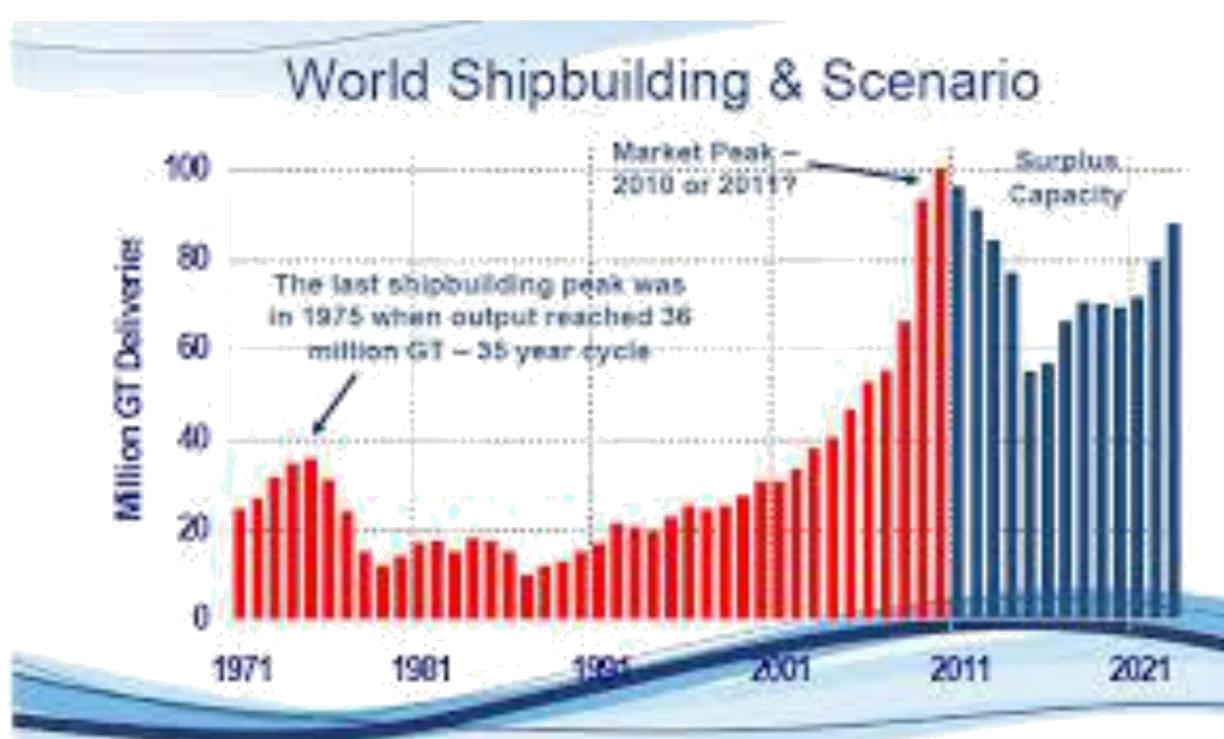
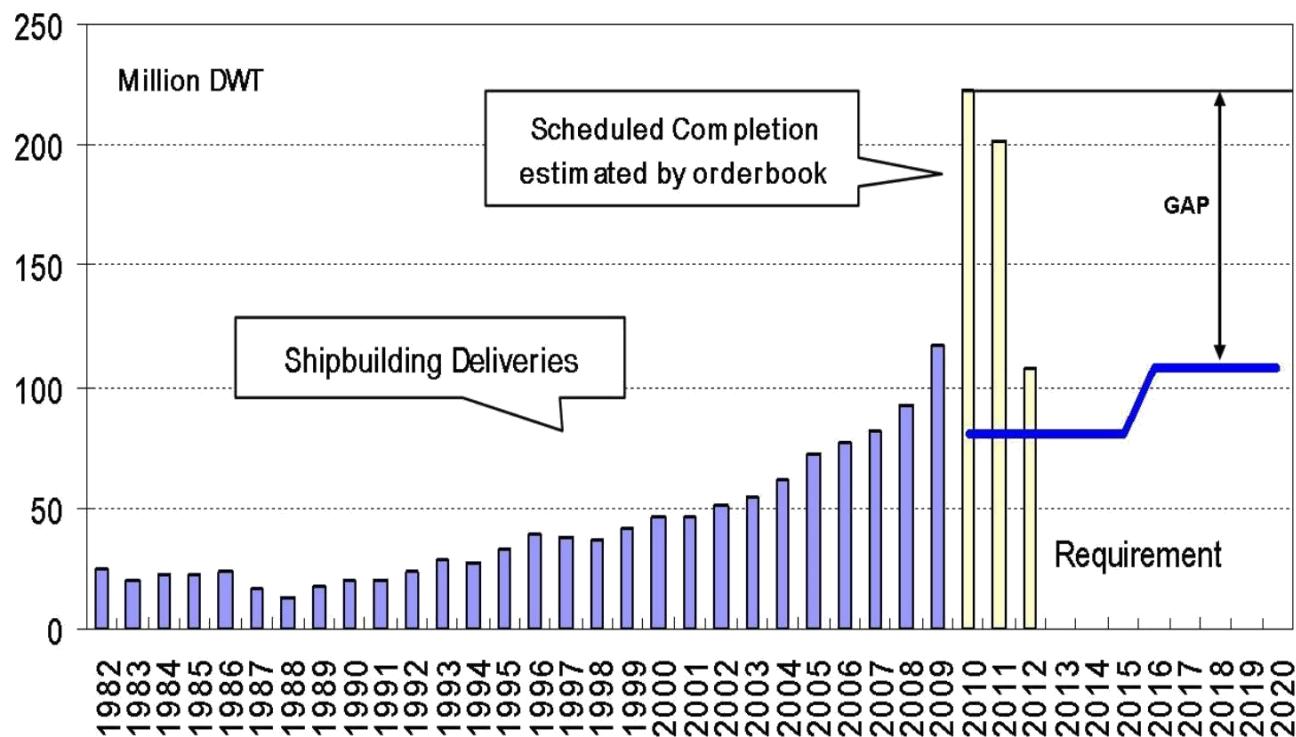
Global Shipbuilding Delivery

Number of shipyards scheduled to deliver their last ships currently on order by year.



Source: Clarkson's Research

Copyright Stratfor 2017



<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/ship-boat-building.html>

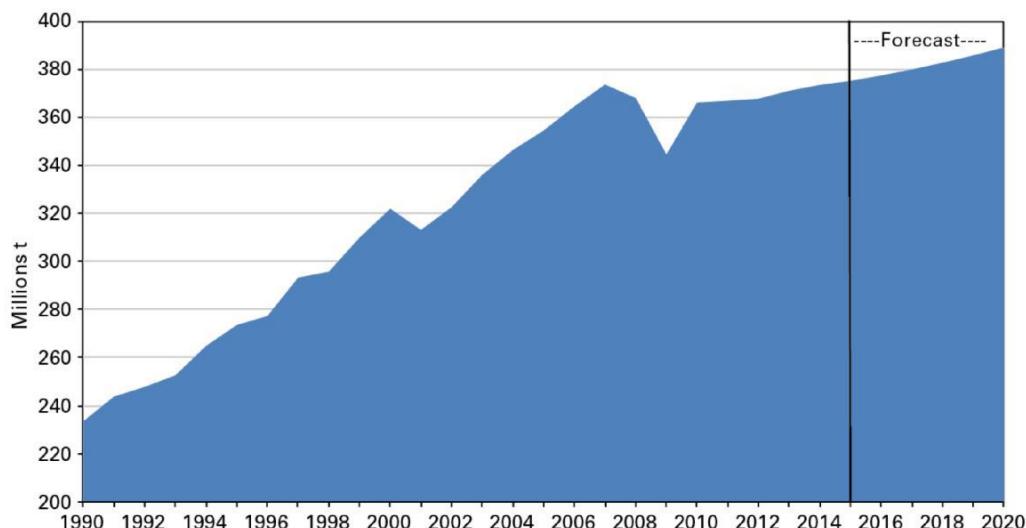
27. Pulp and Paper industry-380 billions USD

<https://www.worldatlas.com/articles/all-about-the-pulp-and-paper-industry.html>

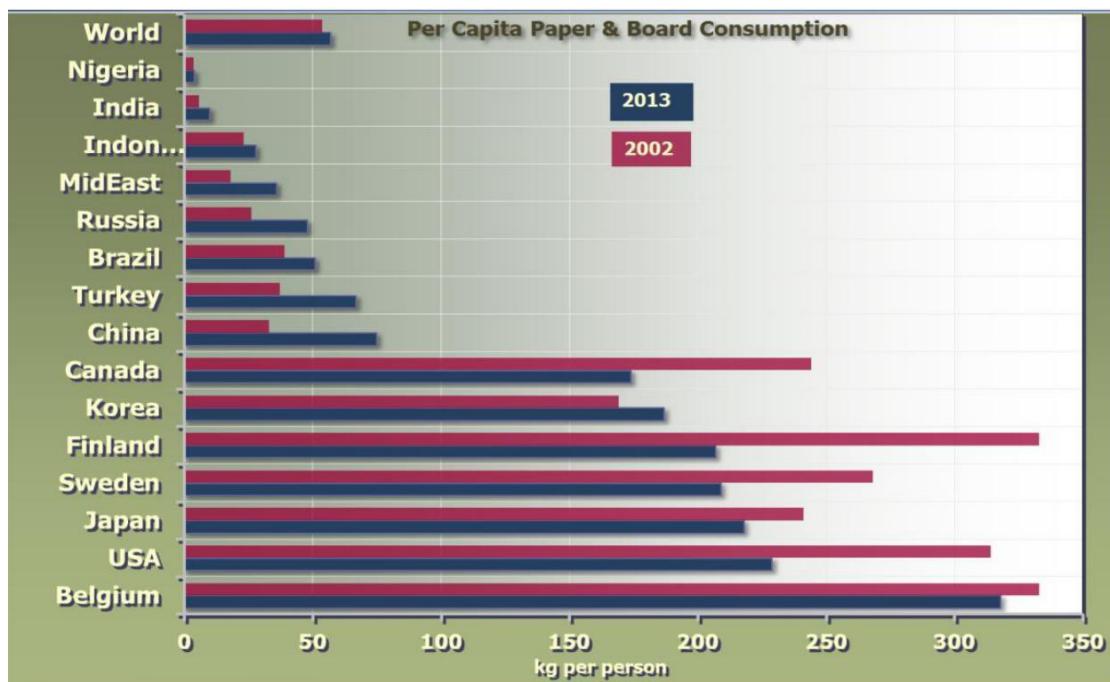
<https://www.ibisworld.com/industry-trends/global-industry-reports/manufacturing/paper-pulp-mills.html>

<https://www.ibisworld.com.au/industry-trends/market-research-reports/manufacturing/pulp-converted-paper-product/>

World P&B production forecast to 2020

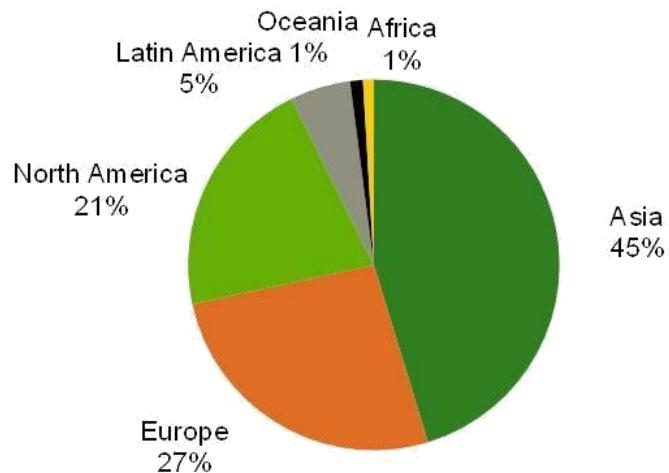


Source: Hawkins Wright Estimates



Global Paper Production 2013

by Region



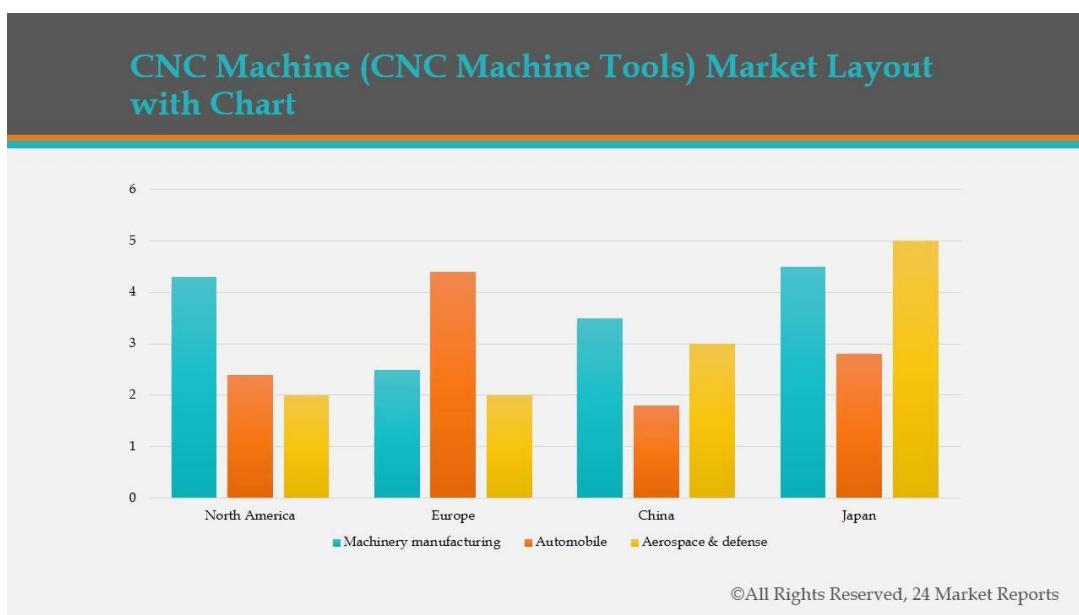
Total Production: 403 Million Tonnes (2012: 399 Million Tonnes)

Source: PPI



28. Machine tools - 120 billions USD

<https://www.manufacturingtomorrow.com/article/2017/12/6-ways-industry-4.0-is-changing-machine-tools/10787/>





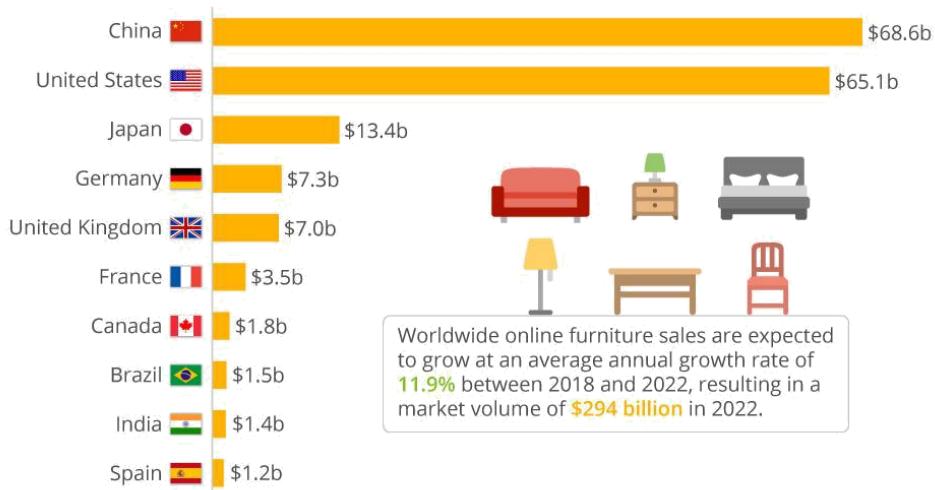
29. Furniture - 470 billions USD

<https://globenewswire.com/news-release/2018/09/07/1567975/0/en/Global-Furniture-Market-Will-Reach-USD-472-30-Billion-By-2024-Zion-Market-Research.html>

<https://brandongaille.com/44-furniture-industry-statistics-and-trends/>

Online Furniture Sales Are Booming

Estimated e-commerce sales of furniture, homewares and home decor in 2018*



* incl. furniture, kitchen and bathroom accessories, kitchens, glass ceramics & porcelain, antiques, decoration, lamps, lights and bulbs

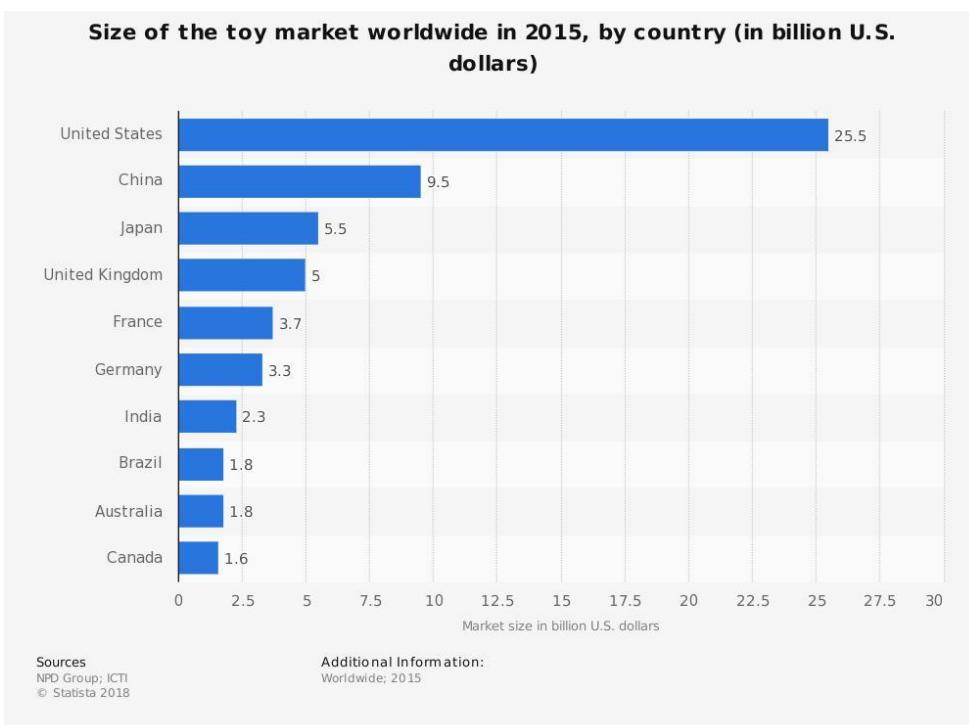
Source: Statista Digital Market Outlook

statista

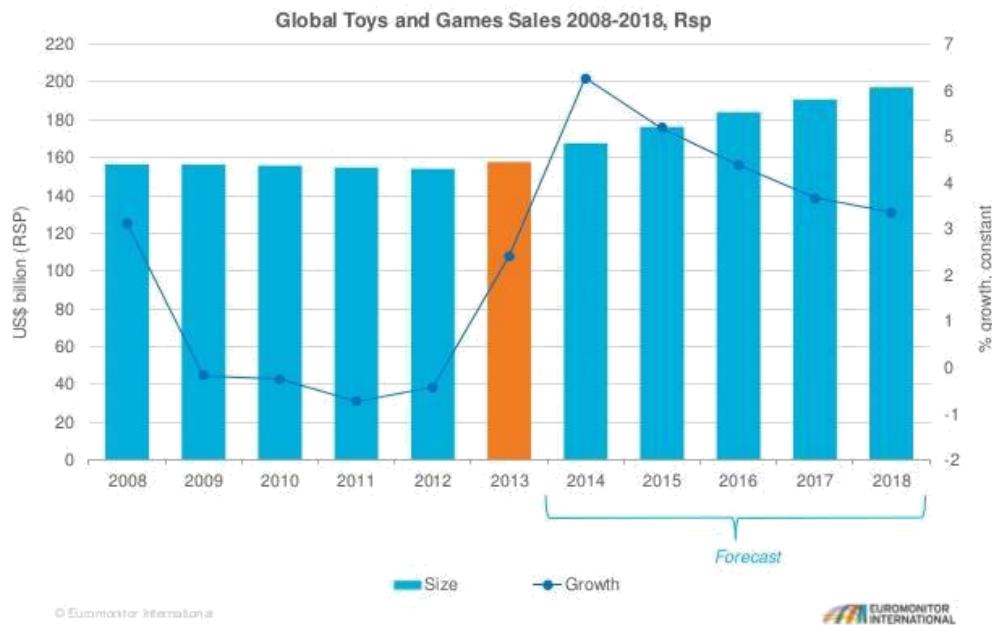
30. Toys industry - 180 billions USD

<https://www.statista.com/topics/1108/toy-industry/>

<https://www.toyassociation.org/ta/research/data/population/toys/research-and-data/global-sales-data.aspx>



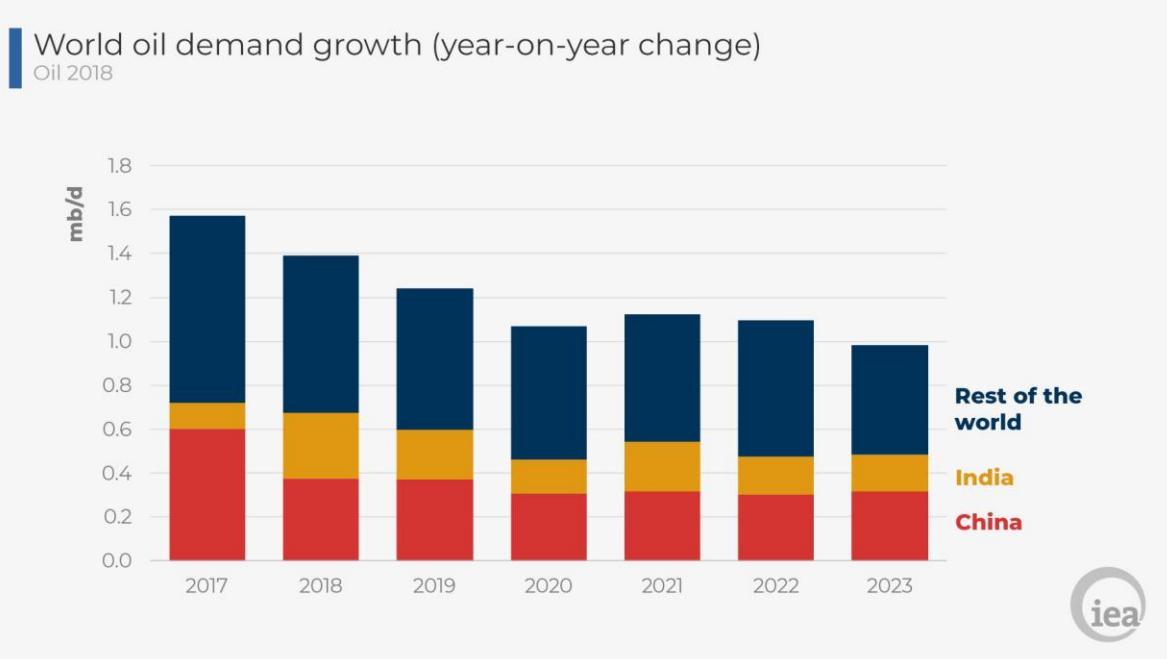
Accelerating Global Growth



31. Petrochemicals -791 billions USD

<https://www.processingmagazine.com/global-petrochemical-market-estimated-to-reach-791-billion-by-2018/>

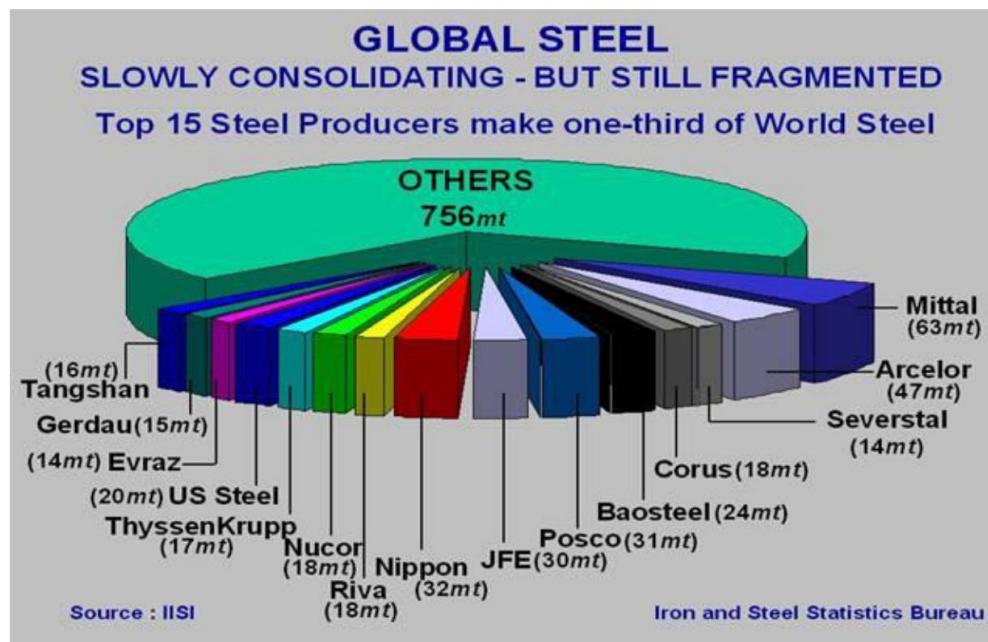
<http://cdn.ihs.com/www/pdf/asia-chem-conf/Eramo.pdf>



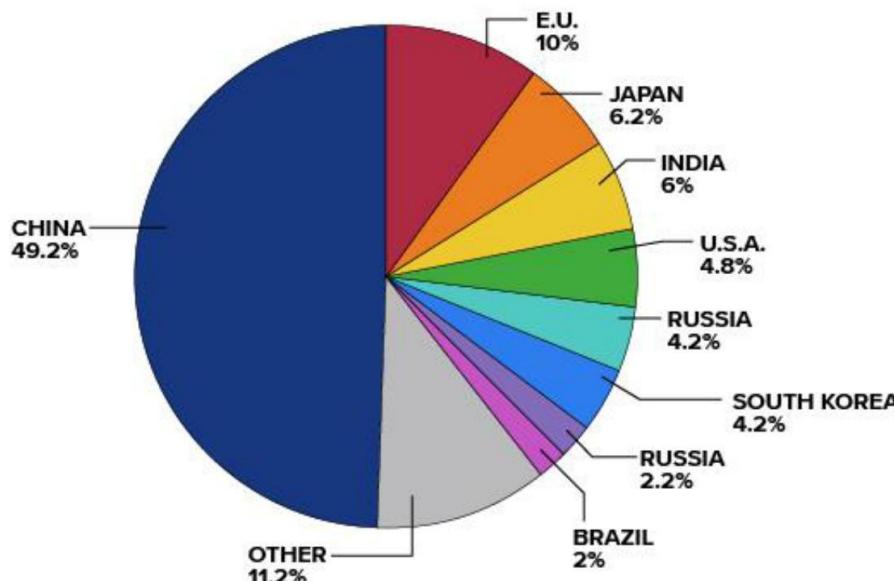
32. Metal industry - 2374 billions USD

<https://www.lucintel.com/metal-market-2017.aspx>

<https://www.worldsteel.org/media-centre/press-releases/2018/world-steel-in-figures-2018.html>



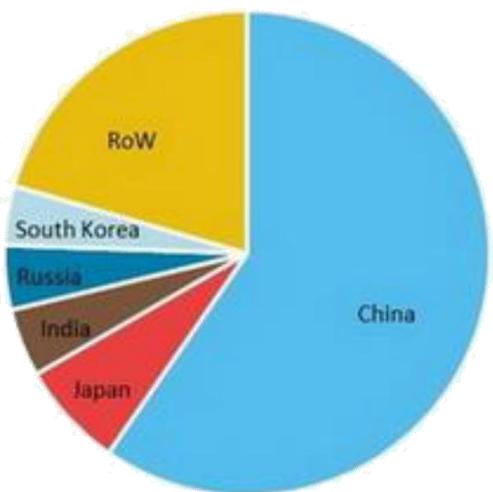
GLOBAL STEEL PRODUCTION IN 2017



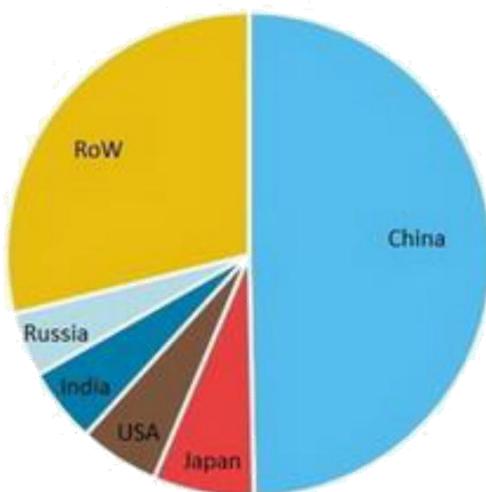
Source: Worldsteel

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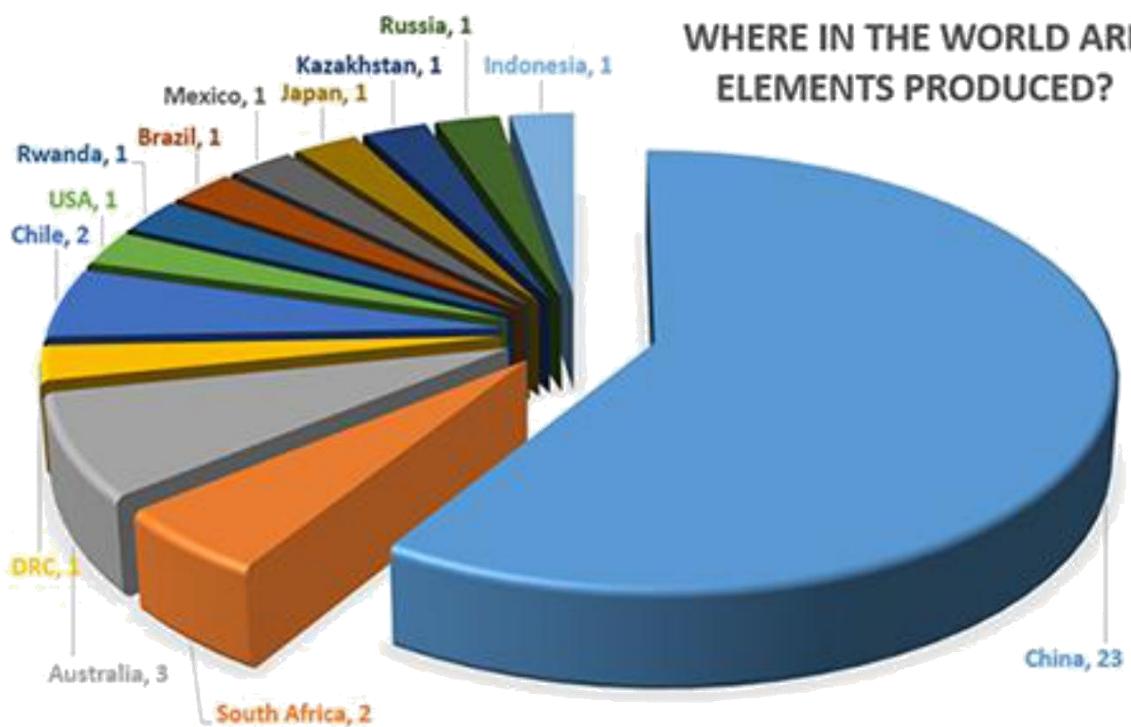
World Pig Iron Production



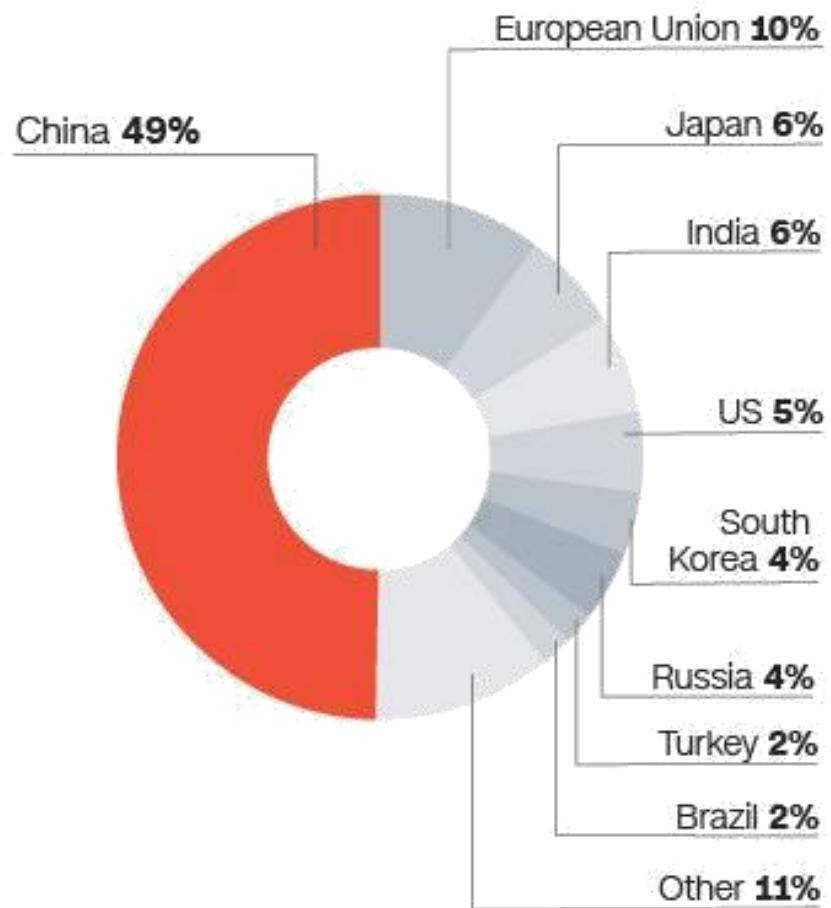
World Raw Steel Production



WHERE IN THE WORLD ARE ELEMENTS PRODUCED?



Top steel producers



Source: WorldSteel, 2017

Notes: Percentages rounded to nearest whole number.