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Injection Molded Plastics

US Industry Study with Forecasts to **2010 & 2015**

Study #2118 | October 2006 | \$4300 | 293 pages

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Diverse applications, cost efficiency and rebounding markets to propel US demand for injection molded plastics up 2.8 percent annually to almost 16 billion pounds in 2010

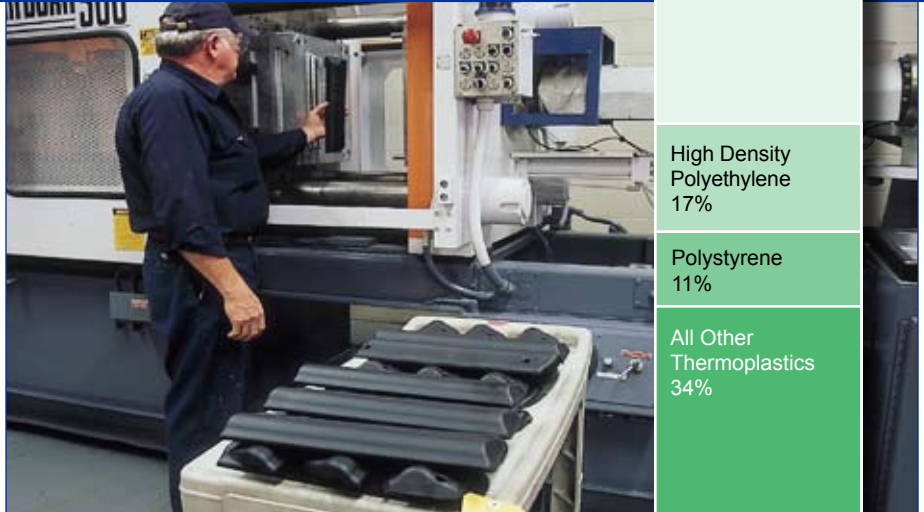
US demand to approach 16 billion pounds in 2010

Injection molded plastics demand in the US is projected to grow 2.8 percent annually to almost 16 billion pounds in 2010, valued at \$14.7 billion (resin content only). Resins will account for 40 percent of total injection molded product costs of \$36.8 billion. Advances will reflect injection molding's diverse applications and cost efficiency, as well as rebounding markets. Resin and machinery improvements will also expand applications by enhancing product performance, quality and throughput. Polypropylene holds the best opportunities with fastest growth anticipated in medical, packaging, and electrical and electronic markets. Thermoplastic resins will remain dominant due to processing, design and recycling advantages over thermosets.

Polypropylene, polystyrene, HDPE leading resins

Growth in demand for injection molded polypropylene will be based on the resin's low cost, good performance and improved performance characteristics such as clarity and melt strength. Best opportunities are anticipated in packaging uses such as caps and closures, and housewares and personal care products. Demand gains for injection molded high density polyethylene will be fueled by industrial packaging opportunities such as shipping pails, and totes and crates. Growth will result from expanding industrial activity and export markets.

Injection Molded Plastics Demand (13.9 billion pounds, 2005)



Thermosets 3%

Injection molded polystyrene demand will rise slowly due to competitive pressures from lower cost resins such as HDPE and polypropylene. Nonetheless, polystyrene remains one of the best materials for injection molding, with solid gains expected in electrical and electronic components, and consumer products.

Best growth is expected for injection molded polycarbonate and thermoplastic polyester. Injection molded polycarbonate demand will be buoyed by opportunities in electrical and electronic, and medical applications due to the resin's clarity, durability and cost effectiveness when blended with other polymers. Thermoplastic polyester demand will be fueled by opportunities in electrical and

electronic products due to its chemical resistance and fine electrical properties.

Packaging, consumer markets to remain dominant

Packaging markets for injection molded plastics will be driven by opportunities in caps and closures, industrial shipping pails, totes and crates. Consumer market growth will reflect needs for inexpensive, convenient, lightweight and unbreakable housewares and personal care products such as storage containers and razors. Threatening further advances will be saturation in areas such as appliances and toys and recreational products, plus continued import growth from low cost offshore producers such as China.

Sample Text, Table & Chart

MARKETS

Housewares & Personal Care Products

Demand for injection molded plastic in the production of housewares and personal care products will rise 3.4 percent yearly to 1.1 billion pounds in 2010. Stimulants include injection molding efficiency and diverse applications. Housewares encompass a wide range of injection molded products, ranging from food storage containers to microwaveable cookware and kitchen utensils to household organizers, garment hangers, laundry baskets, toilet seats and planters.

Personal care products include such items as disposable razors, toothbrushes, contact lens cases, curlers, barrettes, hair and cosmetic brushes, and diaper disposal systems. Overall advances will be attributable to the replacement of disposable products such as razors, or a variety of inexpensive and lightweight products.

Polypropylene accounted for 71 percent of all injection molded resins used in housewares and personal care products in 2005. The resin will continue to grow by cost and performance over other resins. Polypropylene grades, including metallocene polypropylene, include low density polyethylene, high density polyethylene and polystyrene. These resins are used in the manufacture of products such as deodorant containers, lip balm containers, combs, hair brushes, foot care products, brooms, household pails, giftware, storage and organizational products, hangers, laundry baskets, detergent scoops, wastebaskets, soap dishes and ash trays. Threats to additional housewares and personal care product demand include continued import growth from lower cost offshore producers in countries such as China and Malaysia.

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TABLE IV-11

HOUSEWARES & PERSONAL CARE MARKETS FOR INJECTION MOLDED PLASTICS BY RESIN (million pounds)

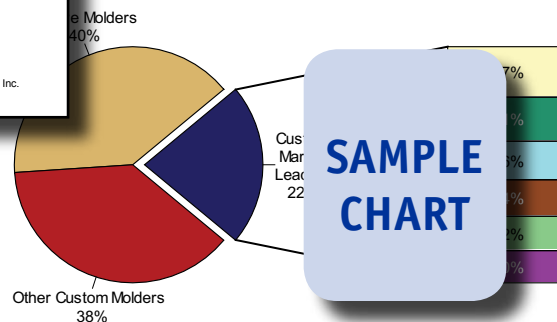
Item	1995	2000	2005	2010	2015
Consumer Expenditures (bil 2000\$)	542	650	704	805	880
lbs resin/000\$ expend	0.000	0.000	0.000	0.000	0.000
Inj Molded Houseware/Personal Care	1	1	1	1	1
Polypropylene					
Low Density Polyethylene					
High Density Polyethylene					
Polystyrene					
Other					
% houseware/personal care					
Injection Molded Consumer Markets	32	32	32	32	32

SAMPLE TABLE

SAMPLE TEXT

CHART V-1

INJECTION MOLDED PLASTIC MARKET SHARE, 2005 (\$26.7 billion)



* market share figures include resins, additives & processing

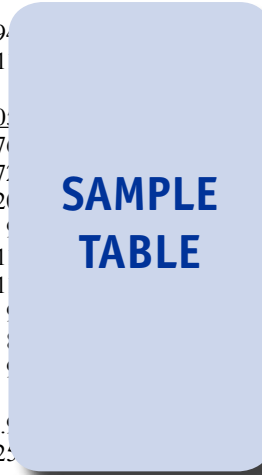
SAMPLE CHART

**Sample Profile,
 Table & Forecast**

TABLE III-13

**INJECTION MOLDED THERMOPLASTIC
 POLYESTER DEMAND BY MARKET
 (million pounds)**

Item	1995	2000	2005	2010	2015
Durable Goods Shpts (bil 2000\$)	179.4	179.4	179.4	179.4	179.4
lbs TP polyester/000\$ shpts	0.1	0.1	0.1	0.1	0.1
Inj Molded Thermoplastic Polyester	20.0	20.0	20.0	20.0	20.0
Electrical & Electronic	7.0	7.0	7.0	7.0	7.0
Motor Vehicles	7.0	7.0	7.0	7.0	7.0
Consumer:	20.0	20.0	20.0	20.0	20.0
Appliances	9.0	9.0	9.0	9.0	9.0
Other	11.0	11.0	11.0	11.0	11.0
Medical	1.0	1.0	1.0	1.0	1.0
Industrial	1.0	1.0	1.0	1.0	1.0
Construction	1.0	1.0	1.0	1.0	1.0
Other	1.0	1.0	1.0	1.0	1.0
% thermoplastic polyester	1.1	1.1	1.1	1.1	1.1
Injection Molded Thermoplastics	1052.0	1052.0	1052.0	1052.0	1052.0



COMPANY PROFILES

Tupperware Brands Corporation
 14901 South Orange Blossom Trail
 Orlando, FL 32837
 407-826-5050
<http://www.tupperware.com>



Sales: \$
 North Am
 Employe

Key Pro... g containers; microwave cook-
 ware; an

Tupperware, which changed its name from Tupperware Corpora-
 tion to Tupperware Brands Corporation in December 2005, manu-
 factures and sells consumer products for the home and for personal
 care applications. The Company's products are categorized into three
 groups: Tupperware, BeautiControl and International Beauty.

The Company participates in the US injection molded plastics in-
 dustry through the Tupperware product group, which generated sales of
 \$1.1 billion in 2005. The group consists of such items as plastic food
 storage and serving containers, microwave cookware and educational
 toys. These consumer products are sold worldwide under the TUPPER-
 WARE brand name. TUPPERWARE products are mainly sold directly
 to distributors, directors and dealers. These products are also sold via
 residence-based sales parties and other retail methods. Specific storage
 and serving products in the TUPPERWARE line include FRIDG-
 ESMART and STUFFABLES storage containers, JEL-RING dessert
 molds, CLASSIC SHEER pitchers, WONDERLINE bowls with lids,
 baking forms, measuring cups, drinking cups, canisters, plates and
 serving trays. The Company produces microwave cookware, including

"Demand for injection molded thermo-
 plastic polyester in the production of
 electrical and electronic products will
 climb 6.2 percent annually through 2010
 to 170 million pounds. Rebounding
 production of electrical and electronic
 products will lead to greater demand for
 thermoplastic polyester in products such
 as business machines, large and small
 appliances, fiber optic cable buffer tubes,
 connectors, switches, terminal blocks,
 printed circuit boards and related parts."
 --Section III, pg. 87

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OTHER STUDIES

World Thermoplastic Elastomers

Global demand for thermoplastic elastomers (TPEs) will grow 6.3% annually through 2011, as they continue to replace natural and synthetic rubber, rigid thermoplastics and metal. China will gain market share but the US will remain the top producer of some products such as olefinic-based TPEs. This study analyzes the \$10.4 billion world TPE industry, with forecasts for 2011 and 2016 by type, market, world region and for 16 countries. It also evaluates company market share and profiles major producers.

#2284 12/2007..... \$5500

Stretch & Shrink Film

US stretch and shrink film demand will grow 4.7% annually through 2011, driven in part by retail trends favoring shrink-wrapped multipacks and pallet wrap. Stretch and shrink film will grow at a similar pace, with stretch film remaining the larger segment. The dominant resin, LDPE, offers the best growth opportunities. This study analyzes the \$3.7 billion US stretch and shrink film industry, with forecasts for 2011 and 2016 by type, market and resin. It also evaluates market share and profiles major players.

#2254 10/2007..... \$4400

Specialty Films

US specialty film demand will grow 4.8% annually through 2010. Gains will be driven by higher value materials, the rapid adoption of modified atmosphere packaging and improved film coating and metallization. Barrier films will remain dominant while biodegradable and water soluble films will grow the fastest from a small base. The study analyzes the \$5.8 billion US specialty film industry for 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2158 02/2007..... \$4400

Polyvinyl Chloride in China

China leads the world in both production and consumption of polyvinyl chloride (PVC). Demand for PVC in China will rise 8% annually to 2010. Suspension PVC from calcium carbide route will continue as the leading type. Extruded PVC will gain market share and construction will remain the largest application. This study analyzes the PVC industry in China to 2010 and 2015 by end use, market and region. It also considers market environment factors, evaluates market share and profiles major players.

#2131 11/2006..... \$4900

Engineering Plastics

US engineering plastic demand will grow 3.5% annually through 2010. Gains will be driven by a resurgent electrical and electronics market, the largest outlet for engineering resins, and by increasing per vehicle use in the large motor vehicle market. Polycarbonate and polyesters will offer the best growth prospects among higher-volume resins. This study analyzes the \$8.4 billion US engineering resin industry to 2010 and 2015 by product and market. It also evaluates market share and profiles major producers.

#2106 10/2006..... \$4300

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