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Extruded Plastics

US Industry Study with Forecasts for **2011 & 2016**

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US Industry Study with Forecasts for ***2011 & 2016***

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Polypropylene will exhibit the fastest growth among extruded plastics in the US, propelled by sheet and film applications, mainly in the production of trays, cups, bowls and related uses.

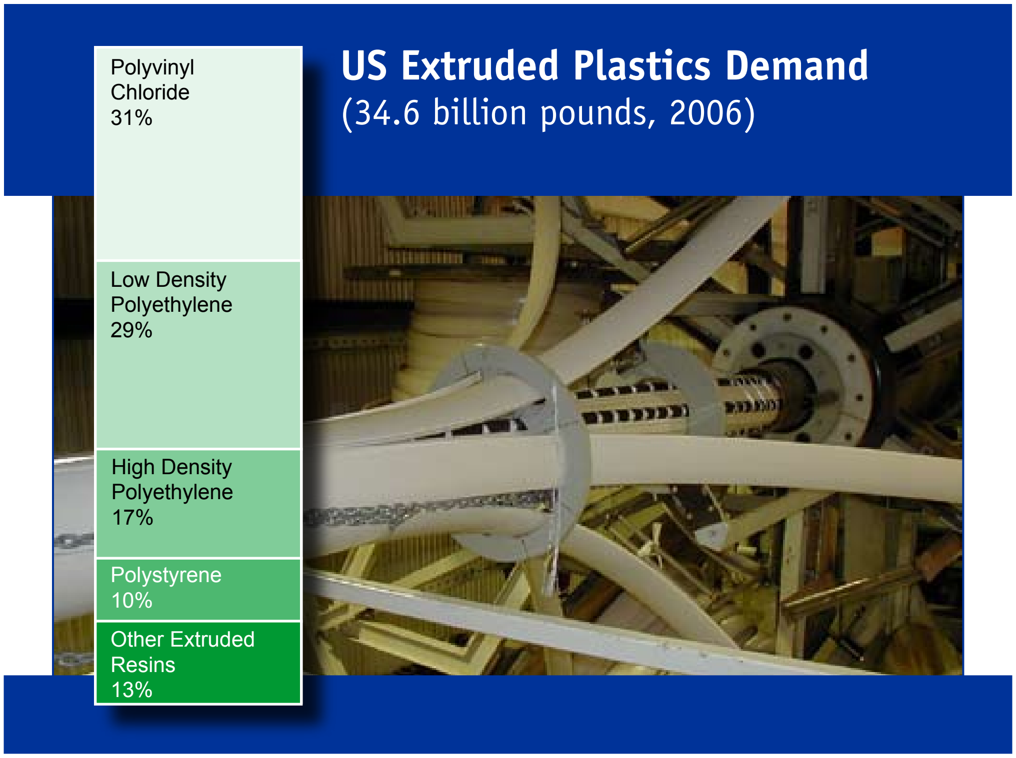
US demand to approach 40 billion pounds in 2011

Demand for extruded plastics in the US is projected to grow 2.8 percent yearly to nearly 40 billion pounds in 2011, valued at over $32 billion (resin content only). Resins will account for 40 percent of the final product cost of $81.3 billion. Advances will be driven by extrusion's cost efficiency, processing ease and high volume uses, as well as machinery improvements. Extrusion will remain the highest volume plastic production process, accounting for 42 percent of total plastics demand in 2011.

PVC, LDPE to remain dominant extruded resins

Polyvinyl chloride (PVC) and low density polyethylene (LDPE) together accounted for 60 percent of all extruded plastics demand in 2006. Extruded PVC demand is projected to grow 2.4 percent annually to 12.2 billion pounds in 2011, fostered by its amenability to high volume construction applications such as pipe, siding, windows, molding and trim, and fencing and decking. Faster growth is anticipated for LDPE based on its dominance of food packaging uses. Polypropylene will exhibit the fastest growth, propelled by sheet and film applications, mainly in the production of trays, cups, bowls and related uses.

Demand for extruded high density polyethylene is forecast to increase 3.4 percent per annum to 7.1 billion pounds in 2011, with good prospects anticipated in pipe, film, and wire and cable applications. Slow growth is expected for extruded polystyrene based on competition from polyolefin and polyester resins. Nonetheless, polystyrene will remain a major player in disposable packaging applications such as foamed cups, plates and other containers. Extruded foamed polystyrene is also used in building and other insulation applications, where it competes with expandable polystyrene.



US Extruded Plastics Demand
(34.6 billion pounds, 2006)

Key construction, packaging markets to lead gains

Construction and packaging markets together accounted for 78 percent of all extruded plastics demand in 2006. Best opportunities are anticipated for fencing and decking, followed by molding/trim and pipe. Construction markets will be buoyed by a rebounding nonresidential building construction segment and continued growth in the improvement and repair sector. Packaging markets for extruded plastics will be fueled by cost advantages over paper and metal, and continued opportunities in the production of blister packs and clamshells, as well as cups, bowls, plates and disposable packaging. Consumer markets will be stimulated by rising demand for trash bags and appliances, recreational products and other components. Smaller extruded plastics markets include motor vehicles, industrial, electrical and electronics, and medical uses.

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Sample Text, Table & Chart

TABLE III-14

EXTRUDED POLYPROPYLENE DEMAND BY APPLICATION (million pounds)

Item	1996	2001	2006	2011	2016
Polypropylene Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% extruded	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Extruded Polypropylene Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Film:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonfood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Secondary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Sheet	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wire & Cable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% polypropylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Extruded Plastics Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

RESINS

Film

Demand for HDPE film is projected to advance nearly t[illegible] per annum to [illegible] Opportunities are e[illegible] number of ar[illegible]sh bags, and baked other food pa[illegible]t primarily of stand although ther[illegible] (HMW-HDPE) var metallocene [illegible]ffer different perfor processing ch[illegible]or HDPE film are n or extensive [illegible]ethylene.

SAMPLE TEXT

Food pa[illegible]PE film will increas cent per annu[illegible] 2011, driven by opp food segments such as baked goods, grain mill products and snack foods. Snack food uses will remain dominant based on continued new product introductions and sales of potato chips, tortilla chips and other salted products. HDPE is also used in single-serving snack bags, bagel bags and other food packaging bags. Further advances will be moderated by competition from polypropylene, as well as increased use of rigid plastic containers.

Demand for HDPE film in the production of nonfood packaging will be stimulated by growth in drug, health and beauty aid applications such as bags and overwraps for items ranging from cotton balls and swabs to vitamins. Further advances will be constrained by the established position of low density polyethylene in many of these applications. Cosmetic and toiletry packaging requiring clarity, sterility and puncture resistance also frequently uses HDPE film. Rack and counter uses for HDPE film will be constrained by saturated applications and competition from low density polyethylene and polypropylene film. Products packaged include toys, housewares, games, novelty goods, cabinet hooks, hardware and other small items

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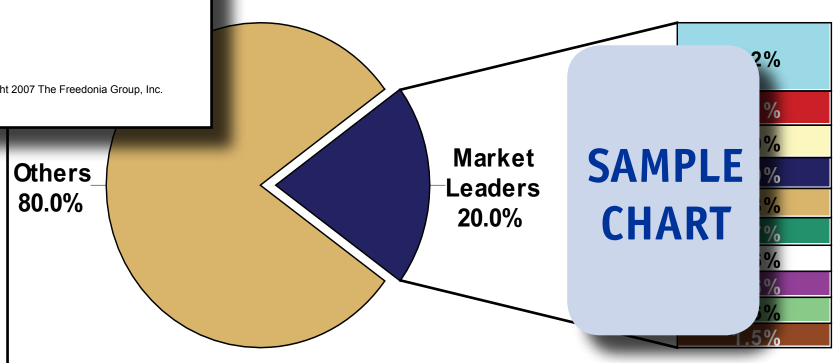
CHART V-1

[illegible]TRUDED PLASTICS MARKET SHARE, 2006 ($58.9 billion)



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Sample Profile, Table & Forecast

TABLE IV-10

PACKAGING MARKET FOR EXTRUDED PLASTICS BY RESIN (million pounds)

Item	1996	2001	2006	2011	2016
Plastic Packaging Shpts (bil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
lbs plastic/$ pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Extruded Plastics in Packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
LDPE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Polystyrene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
HDPE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Polypropylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Polyester	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Extruded Plastics Demand	25820	[illegible]	[illegible]	[illegible]	45350

SAMPLE TABLE

COMPANY PROFILES

Atlantis Plastics Incorporated
1870 The Exchange, Suite 200
Atlanta, GA 30339
770-953-4567
http://ww

Sales: $
Employ

Key Pro ... and custom extruded plastic p

SAMPLE PROFILE

Atl ... ved in the production of speciai ... operates in three segments: Plastic Films, Injection Molding and Profile Extrusion.

The Company is active in the US extruded plastic industry through the Plastic Films and Profile Extrusion segments, which generated sales of $267 million and $33 million, respectively. Among other products, these two segments manufacture extruded stretch and custom films, and custom extruded plastic profile components.

Stretch film from Atlantis Plastics includes machine- and hand-wrap monolayer and multilayer varieties made from linear low density polyethylene (LLDPE) via blown and cast extrusion processes. Typically, these films are employed in wrapping palletized industrial and consumer goods for shipping and storage; and bundling carpet rolls, construction materials, furniture, paper and other nonpalletized products. Among the Company's machine-wrap stretch films are LINEAR ECLIPSE and ADVANTAGE ULTIMATE films featuring one-sided cling properties for high-speed wrapping of nonstandard loads; ADVANTAGE CENTURION and LINEAR "S" films with two-sided

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"**Film** -- Demand for plastic film in packaging applications is expected to increase 3.0 percent yearly to 11.4 billion pounds in 2011. Plastic film advances will be based on cost, performance and source reduction advantages over rigid materials. Packaging advances will be stimulated by the need to reduce materials' usage and increase barrier and other physical property attributes."

--Section IV, pg. 121

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Other Studies

Metallocene & Single-Site Polymers

US metallocene and single-site polymer demand will grow 17.7% annually through 2011. mLLDPE will remain dominant while mHDPE and polypropylene will lead gains. Film and sheet will stay the most common application, but will be outpaced by injection and blow molding uses. This study analyzes the $2.4 billion US metallocene and single-site polymer industry, with forecasts for 2011 and 2016 by polymer, application and market. It also evaluates company market share and profiles leading competitors.

#2218 .... 07/2007..................... $4400

Fluoropolymers

US fluoropolymers demand will rise 5.7% yearly through 2011. PVDF resins will lead gains among major types based on strength in architectural coatings. Fluoroelastomers will also do well, benefiting from improved motor vehicle and aerospace markets. Electrical and electronic products will be the fastest growing market. This study analyzes the $1.4 billion US fluoropolymer industry, with forecasts for 2011 and 2016 by product, application and market. It also details market share and profiles major firms.

#2206 .... 06/2007..................... $4400

Reinforced Plastics

US reinforced plastics demand will reach 4.2 billion pounds in 2011, driven by broadened applications and enhanced competitiveness with steel and aluminum. Thermoset resins will remain dominant while thermoplastics will grow faster. Glass fibers will stay the top reinforcement material while nanomaterials will lead gains. This study analyzes the $6.7 billion US reinforced plastics industry to 2011 and 2016 by resin, market and reinforcement. It also evaluates company market share and profiles major players.

#2195 .... 04/2007..................... $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 to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

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

PVC in China

China leads the world in both production and consumption of polyvinyl chloride (PVC), and demand will rise 8% annually through 2010. Extruded PVC will gain market share. Construction will remain the largest application while packaging uses will surpass the consumer and institutional segment to become the second largest PVC market. This study analyzes the ¥44.5 billion Chinese PVC industry to 2010 and 2015 by product, market and region. It also profiles major players and evaluates company market share.

#2131 .... 12/2006..................... $4900

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