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Plastic Film

US Industry Study with Forecasts for **2012 & 2017**

Study #2371 | July 2008 | $4700 | 373 pages

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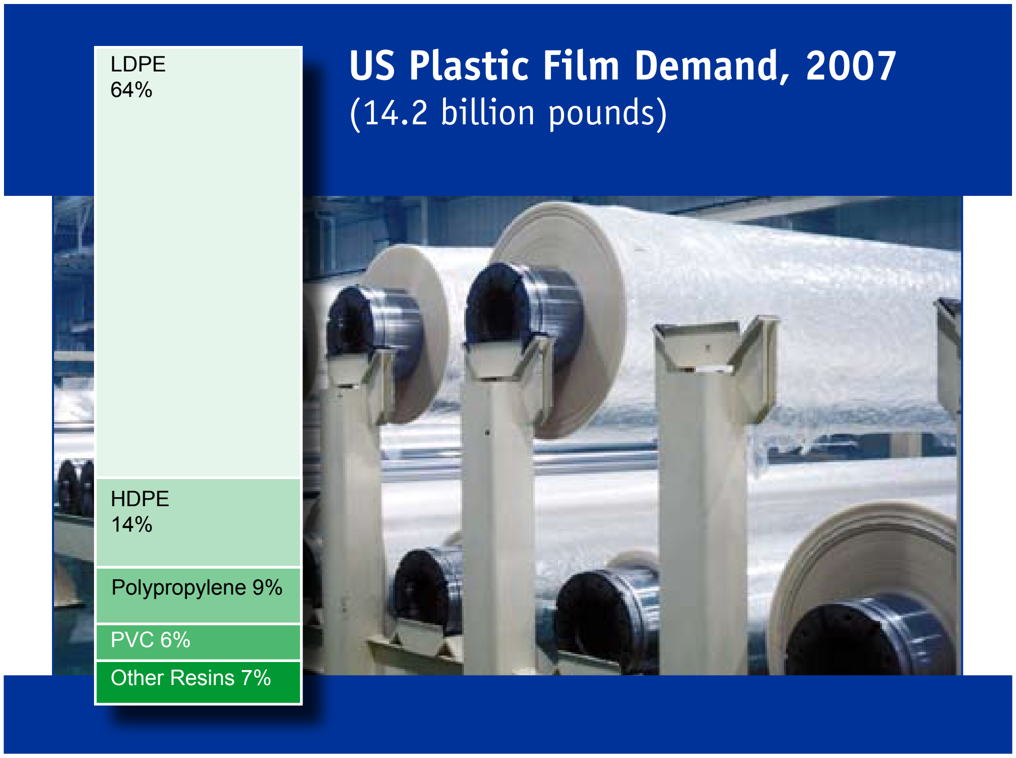
Advances will reflect film's cost, performance and source reduction advantages over rigid packaging, as well as opportunities in film products such as pouches and modified atmosphere packaging.

US demand to exceed 16 billion pounds in 2012

Demand for plastic film in the US is projected to grow 2.6 percent annually to over 16 billion pounds in 2012, valued at $13.4 billion (resin cost only). Total plastic film market value (including resins, additives, and processing and other costs) will reach nearly $32 billion. Advances will reflect film's cost, performance and source reduction advantages over rigid packaging, as well as opportunities in film products such as pouches and modified atmosphere packaging. Low density polyethylene will remain the leading film, accounting for almost two-thirds of the total in 2012. Among the low volume films, degradable plastics will exhibit the fastest growth, followed by ethylene vinyl alcohol.



LDPE, polypropylene film to offer best opportunities

Demand for low density polyethylene film is forecast to increase nearly three percent yearly to 10.5 billion pounds in 2012. This will result from the film's competitive cost structure, versatility and opportunities in areas such as produce and snack packaging, stretch and shrink wrap, and trash bags. High density polyethylene film demand will grow at a below average pace as a result of slow retail bag advances. Polypropylene film demand will expand 3.4 percent annually to 2012, driven by produce, grain mill, dairy product and other food packaging applications.

Polyethylene terephthalate (PET) film demand will continue to decline as remaining applications in photographic film and magnetic tape diminish further in the wake of continued inroads made by digital cameras, CDs and DVDs. Nonetheless, good opportunities are anticipated for PET film in food packaging applications such as snack foods, confections and frozen food, due to needs for higher barrier properties. Polyvinyl Chloride film demand will advance 1.0 percent annually through 2012 with further growth threatened by marginal increases in red meat consumption from polyolefin and degradable films.

Secondary packaging to be fastest growing market

The most rapidly growing use of plastic film is anticipated in the secondary packaging segment of the dominant packaging market, due to opportunities in areas such as stretch and shrink wrap, and retail bags. Food packaging will grow at a near average pace, driven by continued expansion in produce, confections and frozen food segments. Non packaging film advances will be fueled by trash bag growth. Research efforts will focus on improving film's strength, barrier and graphic capabilities, while maintaining a competitive cost position.

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Sample Text, Table & Chart

TYPES & APPLICATIONS

Secondary Packaging

Demand for low density polyethylene film in secondary uses is expected to expan … 3 billion in 2012, simulated by op … rink wra wrap demand will grow … o billion 2012 as a result of its hig … stretch). resistance and competiti … e LLDP also be more widely used … haracter lowers resin consumption … veness.

SAMPLE TEXT

Best LLDPE stretch film opportunities are anticipated for low density polyethylene, which has advantages such as high ability, puncture resistance and low cost. Metallocene LLDP increasingly being used due to their better downgauging capa enhanced stretch attributes. LLDPE has the ability to not onl strong when stretched, but to actually exert a squeezing force as it tries to recover its original size. This capability makes LLDPE the ideal pallet load unitization material. Pallet wraps are used to fully encase a loaded pallet of boxes or other smaller shipping containers to provide greater load stability and protection from moisture or other damage. Stretch wrap, which is produced with one- or two-side cling, is favored in pallet unitization as it keeps loads clean and dry, does a better job of holding loads together than strapping or other methods, keeps material costs low and reduces labor costs. LLDPE stretch wrap also benefits the environment since it compresses well and is easily recycled. Moreover, resin downgauging has resulted in thinner gauges of film w performance characteristics and ultimately reduces th

The shrink film market is dominated by low den which is projected to expand 4.5 percent annually to in 2012. Low density polyethylene shrink film is mad low melt virgin resin and other additives; when subje

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TABLE V-1

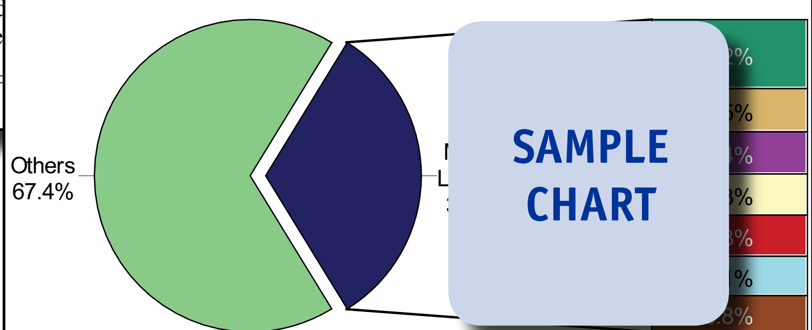
FOOD PACKAGING FILM DEMAND BY APPLICATION (million pounds)

Item	1997	2002	2007	2012	2017
Food Product Shipments (bil 2000$)	400	422	442	463	485
lbs film/000$ shpts	8.5	10.1	9.8	10.6	11.2
Food Packaging Film Demand					
Snack Food					
Meat, Poultry & Seafood					
Baked Goods					
Produce					
Grain Mill Products					
Confections					
Frozen Foods					
Dairy Products					
Other Foods					
% food					
Plastic Film Demand					

SAMPLE TABLE

CHART IX-1

US PLASTIC FILM MARKET SHARE, 2007 ($26.5 billion)*



*** market share figures include resins, additives & processing**

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Sample Profile, Table & Forecast

TABLE VI-4

DRUG, HEALTH & BEAUTY AID FILM DEMAND BY RESIN (million pounds)

Item	1997	2002	2007	2012	2017
Cosmetic & Toiletry Shpts (mil 2000$)	26				380
lbs film/000$ shpts					.9
Drugs, HBA Film Demand					30
Low Density Polyethylene					90
Polyvinyl Chloride					79
High Density Polyethylene					68
Polyethylene Terephthalate					42
Polypropylene					38
Polyvinylidene Chloride					13
% drugs, HBA					.1
Nonfood Packaging Film Demand	11				1710

SAMPLE TABLE

COMPANY PROFILES

Applied Extrusion Technologies Incorporated
15 Read's Way
New Castle, DE 19720
302-326-
http://ww

Sales: $
Employ

Key Pro

SAMPLE PROFILE

App ops and manufac-
tures high propylene (OPP)
films. The privately held company's OPP films are used primarily in consumer product labeling, flexible packaging, overwrap and industrial applications.

The Company is involved in the US plastic film industry through the manufacture of a wide range of OPP films. Among these products are flexible packaging, nonfood packaging, graphic media, label and holographic films.

AET manufactures flexible packaging films for box overwrap, personal care item, snack food, baked good, dairy product, grain mill product, produce and pet food packaging applications. The Company's clear box overwrap films, which are designed to wrap tightly around packages, are suitable for use in various markets. For example, AET makes overwraps that can be utilized in personal care item packaging applications. The Company's products for snack food packaging end uses include T523-3 reverse printable, PST-2 sealable and AQS clear films. Other snack food packaging films include types that feature high oxygen barrier properties and enhanced sealability. AET's baked good

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"Demand for low density polyethylene film in shipping sack production is expected to grow 2.5 percent per year to 470 million pounds in 2012, accounting for 94 percent of all films used. Over the past decade, LLDPE has overtaken LDPE in shipping sack applications as lower gauges of LLDPE can be used to provide the same strength as higher gauges of conventional LDPE, permitting lower resin requirements per sack. Polypropylene accounts for a significantly lower volume of shipping sack demand and the resin will remain a low volume player due to performance drawbacks."
--Section VII, pg. 225

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Other Studies

Engineering Plastics

This study analyzes the US engineering resin industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by resin (e.g., ABS, polycarbonate, nylon, polyesters, polyacetal, fluoropolymers, PPO, polysulfones, PPS, polyimides) and market (e.g., electrical and electronic, motor vehicles, consumer and institutional, construction). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2404 .... 09/2008..................... $4600

Silicones

US silicone demand will rise 4.2% annually through 2012. Silicone fluids will lead gains based on their tendency to boost the performance of cosmetics and toiletries. The relatively small medical market will outpace all others. Silicone conditioning agents and emollients will be the fastest growing applications. This study analyzes the $3.2 billion US silicone industry, with forecasts for 2012 and 2017 by product, market and application. It also evaluates company market share and profiles major players.

#2385 .... 07/2008..................... $4500

Plastic Sheet

Demand for plastic sheet in the US will reach 7.7 billion pounds in 2011, based on sheet's versatility, aesthetic and material combining advantages. Food packaging will be the fastest growing market and account for nearly half of all demand. Polystyrene, polypropylene and polyester sheet offer the best prospects by resin type. This study analyzes the $6.7 billion US plastic sheet industry, with forecasts for 2011 and 2016 by resin and market. It also evaluates company market share and profiles major players.

#2283 .... 12/2007..................... $4500

Biodegradable Plastics

This study analyzes the US degradable plastics industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by degradable plastic type (e.g., polylactic acid, starch-based, cellophane, polyester-based, photodegradable, polyvinyl alcohol, polyethylene oxide); and market (e.g., packaging, fiber, medical). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2387 .... 08/2007..................... $4600

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

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