Specialty Films

US Industry Study with Forecasts for 2012 & 2017

Study #2452 | January 2009 | $4700 | 263 pages
Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT
General .................................................. 4
Macroeconomic Overview ............................ 5
Demographic Trends .................................... 9
Consumer Spending Trends .......................... 12
Manufacturing Outlook ............................... 14
Plastic Films Industry Overview ..................... 17
Technological Developments .......................... 20
Raw Materials .......................................... 23
Pricing Trends .......................................... 25
Historical Market Trends .............................. 27
Regulatory & Environmental Considerations ....... 30
Foreign Trade .......................................... 32
International Activity .................................. 33

PRODUCTS
General .................................................. 35
Polyolefin Films ....................................... 37
Polyvinyl Chloride Films .............................. 40
Polyester Films ......................................... 43
Polyethylene Terephthalate Films .................... 44
Polyethylene Naphthalate Films ...................... 46
Other Polyester Films .................................. 47
Polyvinyl Butyral Films ............................... 48
Nylon Films ............................................ 50
Ethylene Vinyl Alcohol Films ....................... 53
Polyvinylidene Chloride Films ...................... 56
Other Specialty Films .................................. 58
Fluoropolymer Films .................................. 59
Bio-Based Polymer Films ............................. 62
Polyimide Films ....................................... 64
All Other Specialty Films .............................. 65

FUNCTIONS
General .................................................. 68
Barrier Films .......................................... 70
Oxygen & Other Gas Barrier Films .................. 72
Moisture Barrier Films ................................ 75
Other Barrier Films .................................... 78
Decorative Films ...................................... 79
Microporous Films .................................... 82
Safety & Security Films .............................. 86
Interlayer Films ........................................ 88
Surface Films ......................................... 90
Conductive Films ..................................... 93
Light Control Films ................................... 95
Biodegradable Films .................................. 99
Water Soluble Films .................................. 101
Other Functions ....................................... 104

MARKETS
General .................................................. 107
Packaging ............................................... 109
Packaging Industry Overview ........................ 109
Specialty Films Demand ............................... 113
Meat, Poultry & Seafood ............................. 114
Snacks .................................................. 118
Pharmaceutical & Medical ........................... 120
Produce ............................................... 123
Other Packaging ....................................... 125
Construction ............................................ 127
Construction Industry Outlook ....................... 127
Specialty Films Demand ............................... 131
Cabinets ............................................... 133
Windows ................................................ 135
Safety & Security Films ............................. 137
Light Control Films ................................... 139
Vapor Barriers ........................................ 140
Other Construction .................................... 141
Personal Care Products .............................. 144
Disposable Hygiene Products Outlook .......... 144
Specialty Films Demand ............................... 146
Transportation Equipment ........................... 148
Transportation Industry Overview ................. 148
Specialty Films Demand ............................... 151
Automotive ............................................ 152
Aerospace ............................................. 154
Electronics ............................................. 156
Electronic Components .............................. 156
Industry Overview ..................................... 156
Specialty Films Demand ............................... 158
Printed Circuits ........................................ 160
Displays ............................................... 162
Photovoltaic Modules ............................... 164
Other Electronics ..................................... 166
Furniture .............................................. 168
Furniture Industry Outlook .......................... 168

Specialty Films Demand ............................... 170
Other Markets .......................................... 172
Store Fixtures .......................................... 173
Health & Medical Products .......................... 173
Bags ..................................................... 174
All Other Markets ..................................... 174

INDUSTRY STRUCTURE
General .................................................. 176
Market Share .......................................... 178
Acquisitions & Divestitures .......................... 182
Cooperative Agreements .............................. 185
Marketing & Distribution ............................. 186
Research & Development ............................. 188
Competitive Strategies ............................... 189

COMPANY PROFILES
Akzo Nobel ............................................ 192
Amcor Limited ......................................... 193
Applied Extrusion Technologies ..................... 195
Avery Dennison ........................................ 196
Bayer AG .............................................. 199
Bekaert (NV) SA ....................................... 201
Bemis Company ....................................... 203
Cortec Corporation .................................... 206
Dow Chemical ......................................... 207
DuPont (EI) de Nemours ................................ 208
Exopack Holding ....................................... 213
Green (Ernie) Industries ............................... 215
Griffon Corporation .................................... 216
Hitachi Limited ........................................ 218
Honeywell International ............................... 220
InteliCoat Technologies ................................ 222
Kaneka Corporation .................................... 223
Kloeckner Pentaplast .................................... 224
Kuraray Company ....................................... 226
Lintec Corporation ...................................... 227
Mitsubishi Chemical .................................... 230
MonoSol LLC .......................................... 232
Novomatrix Pte ........................................ 233
OMNOVA Solutions .................................... 235
Plastic Suppliers ........................................ 236
Pliant Corporation ..................................... 237
Printpack Incorporated ................................ 239

(continued on next page)
Table of Contents

COMPANY PROFILES
(continued from previous page)

Raven Industries .................................. 240
Research Frontiers ................................ 241
Rio Tinto plc .................................... 242
Saint-Gobain ...................................... 244
Saudi Basic Industries ........................... 246
Sealed Air ......................................... 249
Solutia Incorporated .............................. 251
Teijin Limited .................................... 254
3M Company ....................................... 256
Toray Industries .................................. 259
Tredex Corporation ......................... 260
Westlake Plastics ............................... 262

List of Tables/Charts

EXECUTIVE SUMMARY
1 Summary Table ................................. 3

MARKET ENVIRONMENT
1 Macroeconomic Indicators .................. 9
2 Population & Households .................... 12
3 Personal Consumption Expenditures ..... 14
4 Manufacturers’ Shipments ................. 17
5 Plastic Film Demand ......................... 19
6 Specialty Films Raw Materials
  Demand ........................................ 25
7 Specialty Films Market, 1997-2007 ... 29
8 Specialty Films Market, 1997-2007 ... 29

PRODUCTS
1 Specialty Films Demand by Type ....... 36
  Specialty Films Demand
  by Type, 2007 ............................... 37
2 Specialty Polyolefin Films Demand .... 40
3 Specialty Polyvinyl Chloride
  Films Demand ................................ 43
4 Specialty Polyester Films Demand .... 44
5 Specialty Polyvinyl Butyral
  Films Demand ............................... 50
6 Specialty Nylon Films Demand ....... 53
7 Specialty Ethylene Vinyl Alcohol
  Films Demand ................................ 55
8 Specialty Polypolyvinylidene Chloride
  Films Demand ................................ 58
9 Other Specialty Films Demand ........ 59

FUNCTIONS
1 Specialty Films Demand by Function.. 69
  Specialty Films Demand
  by Function, 2007 ........................... 70
2 Barrier Films Demand ....................... 72
3 Oxygen & Gas Barrier Films Demand .. 75
4 Moisture Barrier Films Demand ....... 77
5 Other Barrier Films Demand .......... 79
6 Decorative Films Demand ................ 82
7 Microporous Films Demand ............. 86
8 Safety & Security Films Demand ...... 88
9 Interlayer Safety & Security
  Films Demand ................................ 90
10 Surface Safety & Security
  Films Demand ................................ 92
11 Conductive Films Demand ............. 95
12 Light Control Films Demand .......... 98
13 Biodegradable Films Demand ......... 101
14 Water Soluble Films Demand .......... 104
15 Other Specialty Films Demand ....... 106

MARKETS
1 Specialty Films Demand by Market . 108
  Specialty Films Demand
  by Market, 2007 ............................ 109
2 Packaging Shipments ....................... 112
3 Packaging Markets
  for Specialty Films ....................... 114
4 Meat Packaging Markets
  for Specialty Films ....................... 118
5 Snack Packaging Markets
  for Specialty Films ....................... 120
6 Pharmaceutical & Medical Packaging
  Markets for Specialty Films ........... 123
7 Produce Packaging Markets
  for Specialty Films ....................... 125
8 Other Packaging Markets
  for Specialty Films ....................... 127
9 Construction Expenditures ............. 131
10 Construction Markets
  for Specialty Films ....................... 133
11 Cabinet Markets for Specialty Films .. 135
12 Window Markets for Specialty Films . 137
13 Vapor Barrier Markets
  for Specialty Films ....................... 141
14 Other Construction Markets
  for Specialty Films ....................... 143
15 Disposable Hygiene Product Sales ... 146
16 Personal Care Product Markets
  for Specialty Films ....................... 148
17 Transportation Equipment
  Shipments .................................... 151
18 Transportation Equipment
  Markets for Specialty Films .......... 152
19 Automotive Markets
  for Specialty Films ....................... 154
20 Aerospace & Other Transportation
  Markets for Specialty Films .......... 156
21 Electronic Components
  Industry Indicators ....................... 158
22 Electronics Markets
  for Specialty Films ....................... 160
23 Printed Circuit Board Markets
  for Specialty Films ....................... 162
24 Display Markets for Specialty Films . 164
25 Photovoltaic Module Markets
  for Specialty Films ....................... 166
26 Other Electronics Markets
  for Specialty Films ....................... 168
27 Furniture Shipments ...................... 170
28 Furniture Markets
  for Specialty Films ....................... 171
29 Other Markets for Specialty Films ... 172

INDUSTRY STRUCTURE
1 US Specialty Film Sales
  by Company, 2007 .......................... 177
  Specialty Films Market Share, 2007 . 179
2 Selected Acquisitions & Divestitures 184
3 Selected Cooperative Agreements ... 186
Gains will be driven in part by high-growth specialty film markets such as photovoltaic modules, biodegradable bags and modified atmosphere food packaging that can extend shelf life.

**US demand to grow 4.7% annually through 2012**

Demand for specialty films is forecast to advance 4.7 percent per year to $7.6 billion in 2012. Gains will be driven by the increasing need for high-performance plastic films that offer such benefits as barrier properties, mechanical strength and chemical resistance in packaging and construction applications. The penetration of specialty films into new, high-growth market areas such as photovoltaic modules and biodegradable bags will also bolster advances in demand. The rapid adoption of modified atmosphere packaging, which can extend the shelf life of packaged food products, will fuel further gains, as will improved processing methods in film coating and metallization.

**Barrier films to remain largest segment**

Barrier films will remain the largest segment of the specialty films industry, accounting for over half of total demand in 2012. Above-average growth will be driven by the rapid rise of case-ready technology in meat packaging, which requires barrier films to maintain an optimum atmosphere inside the package. These opportunities will spur advances for plastic films produced from ethylene vinyl alcohol, nylon and polyvinylidene chloride resins. Gains will also benefit from the increased use of specialty barrier films in pharmaceutical blister packaging applications, particularly fluoropolymer and nylon films in multilayer constructions. Additionally, improvements in metallization technologies are allowing metallized films to become a cost-effective replacement for film/foil and film/paper laminates in food packaging applications.

Safety and security films and light control films are two closely related groups of specialty films, as both are applied to glass substrates and are used in motor vehicles and buildings. While the use of polyvinyl butyral interlayer films in laminated vehicle glass is highly mature and offers minimal opportunities for growth, better prospects are expected for light control films. These films can reduce energy costs in buildings by controlling the transmission of light through windows. Demand for light control films will also benefit from emerging applications in the fast-growing photovoltaic module market.

**Biodegradable, water-soluble films to pace gains**

The most rapid growth in specialty films will occur in biodegradable and water soluble films, which will see double-digit gains from a small base. Demand for biodegradable films, which are used to produce compostable kitchen and lawn bags, will benefit from environmental concerns and increased commercialization of bio-based polymers. Water soluble film demand will receive a boost from the introduction of medicinal and health products in dissolvable thin film form.
Sample Text, Table & Chart

**PRODUCTS**

**Polyvinylidene Chloride Films**

Consumption of polyvinylidene chloride (PVDC) specialty films is forecast to increase 2.8 percent per year to $195 million in 2012, well below the average for specialty films. Gains will be limited by a loss of share to higher performing barrier films such as EVOH and newer, more cost-effective oriented polypropylene films that provide higher strength and moisture transmission rates to PVDC-coated films. These films are used exclusively in packaging applications requiring barrier properties and moisture resistance. These films are, however, more expensive than most other films (though less costly than EVOH), and are therefore used in applications where high barrier properties are required.

Polyvinylidene chloride’s properties include high barriers to moisture, flavors, odors and gases (oxygen and carbon dioxide), with uses encompassing mono- and multilayer films, as well as coatings. PVDC is frequently coextruded with less costly polyethylene and polypropylene films. PVDC film also provides good barriers for liquids (including food oils and organic solvents) and has good chemical resistance. Films can be dyed or pigmented to provide a wide range of colors. The material’s oxygen permeability is unaffected by the presence of moisture.

PVDC is mainly used in packaging applications as a coating layer and in coextrusions with nonbarrier films. Meat and related products applications will remain dominant based on continued requirements for high oxygen and moisture barriers in meat packaging. Prospects in meat applications will, however, be constrained by flat to declining per capita red meat consumption based on health and nutritional concerns. At the same time, opportunities for PVDC are anticipated in laminations and coextrusions for retort pouches for processed meat products. In addition, a favorable outlook for seafood consumption will support gains for...
Cortec Corporation is a privately held supplier of environmentally friendly corrosion control, packaging, and aerosol chemical products. It operates through several divisions and businesses, including the Advanced Films, Coated Products and Spray Technologies divisions. The Company participates in the US specialty films industry through the Advanced Films division (Cambridge, Minnesota). Through this division, Cortec manufactures a range of high-performance, custom, flexible films, including monolayer and coextruded types. Among these products are specialty films that offer such high-performance characteristics as corrosion protection, flame retardancy, ultraviolet (UV) stability and static dissipative properties. These films can be used to make packaging materials for industrial, food and other applications; electronic products protection materials; and protection films for use in flat-rolled steel manufacturing processes. Specific products include VPCI-125 low-density polyethylene shrink film, which features corrosion protection and static dissipative properties; and VPCI-129 barrier films for steel protection in high temperature and high humidity environments. Additional specialty films are sold under the COR-PAK, CORR-LAM, MILCORR, CORSHRINK and other.
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Other Studies

Green Packaging
This study analyzes the US market for environmentally friendly and sustainable packaging. It presents historical recycled content and reusable packaging demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by type (e.g., paper, metal, glass, plastic, biodegradable plastic) and market (e.g., food, beverage, consumer products, shipping, foodservice). The study also discusses source reduction and recycling activity, competitive strategies and merger and acquisition trends, and profiles industry players.

#2471 .................... 03/2009 .................. $4700

World Membranes
This study analyzes the global market for membrane materials used in separation applications. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., microfiltration, reverse osmosis, ultrafiltration), market (e.g., water treatment, wastewater treatment, food and beverage processing, pharmaceutical and medical), world region and major country. The study also considers market environmental trends and indicators, evaluates company market share and profiles industry players.

#2468 .................... 03/2009 .................. $5700

Natural Polymers
US demand for natural polymers will grow 7.1% annually through 2012. Best opportunities are anticipated in packaging uses based on the increased availability and cost competitiveness of novel polymers such as polyactic acid (PLA). Cellulose ether will remain the largest segment while starch and fermentation products jump at double-digit rates. This study analyzes the $2.9 billion US natural polymer industry, with forecasts for 2012 and 2017 by market and product. It also evaluates company market share and profiles industry players.

#2422 .................... 11/2008 .................. $4600

Biodegradable Plastic
US demand for biodegradable plastic will grow 15.5% yearly through 2012. Gains will be driven by escalating costs for petroleum-based resins and growing initiatives that favor renewable resources. Polyester-based and polyactic acid resins will grow at the fastest, while starch-based types remain the largest segment. This study analyzes the 350 million pound US biodegradable plastic industry, with forecasts for 2012 and 2017 by type and market. It also details market share and profiles industry players.

#2387 .................... 08/2008 .................. $4600

Plastic Film
US demand for plastic film will reach 16 billion pounds in 2012. Gains will reflect film’s cost, performance and source reduction advantages over rigid packaging, as well as opportunities in products such as pouches and modified atmosphere packaging. LDPE will remain the top film, while the lower volume degradable plastic segment leads gains. This study analyzes the $25.4 billion US plastic film industry, with forecasts for 2012 and 2017 by type, application and market. It also evaluates market share and profiles industry players.

#2371 .................... 07/2008 .................. $4700

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