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Extruded Plastics

US Industry Study with Forecasts for **2013 & 2018**

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Extruded Plastics

US Industry Study with Forecasts for ***2013 & 2018***

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INDUSTRY STRUCTURE

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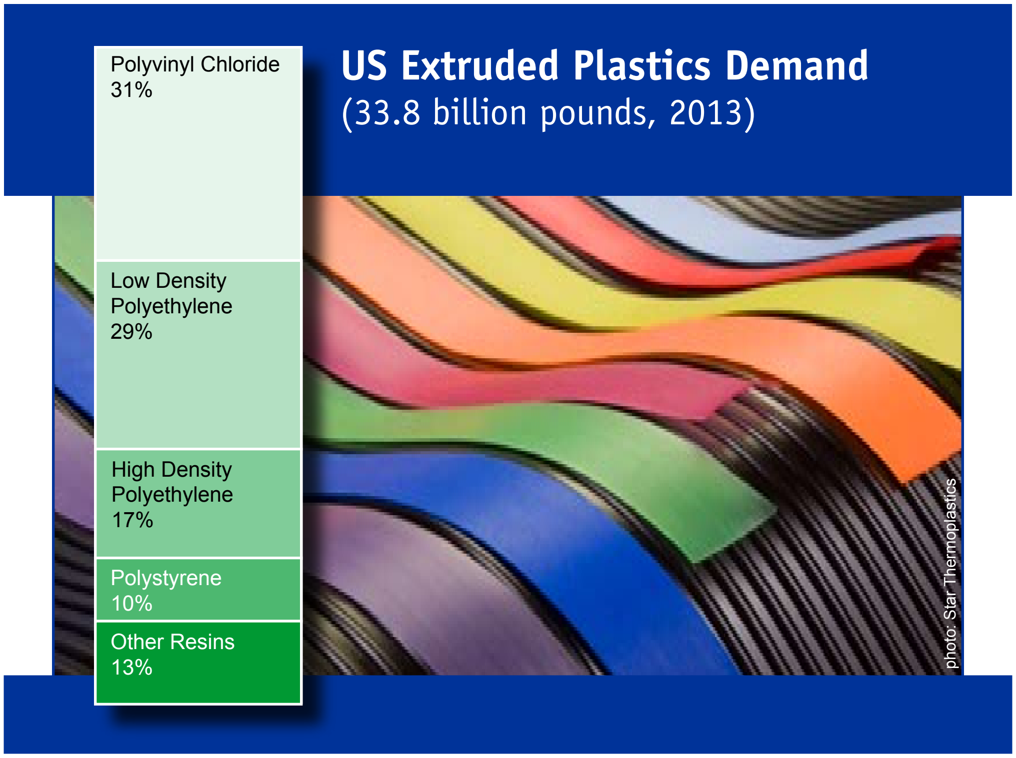
The key factor in extruded plastics' rebound from the declines of 2007/2008 will be a turnaround in the housing market, a major outlet for extruded plastic products such as siding and pipe.

US demand to expand 2.6% yearly through 2013

Demand for extruded plastics in the US is forecast to expand 2.6 percent yearly to nearly 34 billion pounds in 2013, valued at more than $23 billion (resin content only). Resins will account for 40 percent of the final product cost of $59.2 billion. The key factor as extruded plastics rebound from the demand declines of 2007 and 2008 will be a turnaround in the housing market, a major outlet for extruded plastic products such as siding and pipe. Additional growth stimulants will include extrusion's processing ease, cost efficiency and high throughput. Resin and machinery improvements will also expand applications by enhancing product performance, quality and throughput.



Key construction market to grow the fastest

The construction market will rise 3.4 percent per annum to 13.5 billion pounds in 2013. A resurgent residential building construction segment will portend good growth for products such as siding, pipe, windows and doors, molding and trim, and fencing and decking. Demand for extruded plastic packaging will increase 2.4 percent yearly to 13.3 billion pounds in 2013, fostered by growth in disposable packaging products such as cups, bowls and clamshells. Other extruded plastics markets include motor vehicles and industrial, electrical and electronics, and medical uses. Best growth is expected for motor vehicles as production levels rebound from the declines experienced between 2003 and 2008.

Extruded PVC, PP among best growth opportunities

Demand for extruded polyvinyl chloride (PVC) is expected to rise 3.0 percent annually to 10.4 billion pounds in 2013. Good opportunities for PVC are anticipated in high volume construction uses such as siding and pipe. Slower advances for extruded low density polyethylene (LDPE) will reflect saturated film and sheet applications in the packaging arena. The fastest growth in demand is expected for polypropylene (PP), mainly for extruded sheet used in the manufacture of disposable trays, cups, bowls and other packaging.

Demand for extruded high density polyethylene is projected to grow 2.5 percent per year to 5.6 billion pounds in 2013, driven by rapid growth in the potable water and corrugated drain and sewer pipe market. Slower growth is expected for foamed polystyrene due to competition from polyolefin resins in film and other uses. Nevertheless, polystyrene will remain a major player in disposable packaging applications such as foamed cups, plates and other containers due to its light weight and low cost. The fastest foamed polystyrene growth is anticipated in building and other insulation applications.

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Sample Text, Table & Chart

MARKETS

SAMPLE TEXT

Solid: Demand for extruded plastics in other solid packa
markets will grow billion pound
stimulated by eco sable person
levels. Solid pack bowls, trays
shells, blister pacl ns, as well a
lids and domes. T number of a
over competing p ng levels of
and strength that ex weight and
manufacturing costs than glass. Technological innovations r
heat resistance, barrier properties, coextrusion, blending and
ing will also serve to bolster demand.

Extruded solid plastic packaging advances will also be stimulated by the increased presence of smaller snack and other food and nonfood containers. Increases in extruded tub, cup and bowl demand will be largely due to such factors as the growing popularity of single-serving packages of fruit, pudding, soups and snack items, as well as increasing consumption of dairy products (such as yogurt and cottage cheese) traditionally packaged in plastic cups and tubs. Additionally, newer applications for plastic tubs, cups and bowls are emerging, such as ready-to-eat pasta meals, candy, cereal, precut fruit and baby food. Extruded food tray demand will be bolstered by increased use of dual-ovenable trays and trays intended for case-ready meats.

Plastic squeeze tubes, which may be extruded, have inherent
performance characteristics like shape retention, easy portab
flexibility and relatively small size. Squeeze tubes have cap
share from plastic bottles in a number of applications becaus
dispensing and handling, and lower material usage -- attribut
made squeeze tubes more convenient for consumers and less
for manufacturers of products such as cosmetics and toiletrie

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TABLE IV-3

PACKAGING MARKET FOR EXTRUDED PLASTICS BY RESIN
(million pounds)

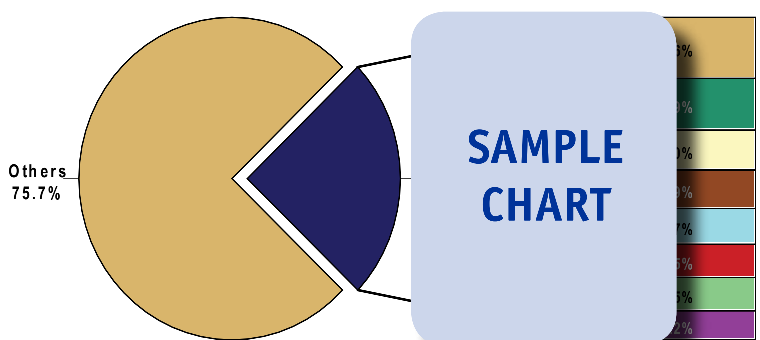
SAMPLE TABLE

Item	1998	2003	2008	2013	2018
Plastic Packaging Shpts (bil 2000$)					
lbs extruded plastic/$ plastic pkg					
Extruded Plastics in Packaging					
LDPE					
Polystyrene					
Polypropylene					
HDPE					
PVC					
PET					
Other					
% packaging					
Extruded Plastics Demand					

CHART V-1

US EXTRUDED PLASTICS MARKET SHARE BY COMPANY, 2008
($43.8 billion)

SAMPLE CHART



Sample Profile, Table & Forecast

TABLE III-8

EXTRUDED LDPE DEMAND IN FILM
(million pounds)

Item	1998	2003	2008	2013	2018
Plastic Packaging Shpts (bil 2000$)					4.5
lbs LDPE film/$ plastic pkg					21
Extruded LDPE Film Demand					70
Food Packaging					00
Nonfood Packaging					00
Secondary Packaging					00
Nonpackaging					70
% film					.9
Extruded LDPE Demand					25

SAMPLE TABLE

COMPANY PROFILES

Serious Materials Incorporated
1250 Elko Drive
Sunnyvale, CA 94089
408-541-8000
http://www.seriousmaterials.com

Annual S ... 2/09)
Employ...

Key Pro...

Ser... sustainable green building... d coatings. The Compan... Canadian markets.

SAMPLE PROFILE

The Company participates in the US extruded plastic market via the manufacture of extruded vinyl windows for residential and commercial applications. Serious Materials sells its vinyl windows under the SERIOUS WINDOWS brand name. For residential end uses, the Company's vinyl windows are suitable for new construction and replacement applications. Commercial uses for the Company's vinyl windows include hospitals and medical buildings, libraries, schools, office buildings and restaurants.

Serious Materials produces SERIOUS WINDOWS vinyl windows at four plants in the US. These plants are in Sunnyvale, California (70,000 square feet); Boulder, Colorado (36,955 square feet); Chicago, Illinois (268,000 square feet); and Vandergrift, Pennsylvania (100,000 square feet). Serious Materials acquired the Boulder facility as part of the Company's purchase of Alpen Energy Group (Boulder, Colorado) in June 2008. Alpen Energy manufactured energy-efficient residential

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"Secondary packaging will exhibit the best growth prospects of all LDPE film and expand 3.0 percent per annum to 3.0 billion pounds in 2013. Advances will reflect opportunities in stretch and shrink wrap, as well as retail bags. Stretch wrap demand will be stimulated by LDPE's high elongation rate (ability to stretch), puncture resistance and competitive cost structure. Shrink wrap advances will result from ..."

--Section III, pg. 58

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Other Studies

Thermoplastic Compounding by Independents

This study analyzes the US independent thermoplastic compounding industry. It presents historical demand data (1998, 2003, 2008) and forecasts to 2013 and 2018 by thermoplastic resin (e.g., engineered thermoplastics, polyvinyl chloride, polypropylene, polyethylene, thermoplastic elastomers, polystyrene) and market (e.g., construction, motor vehicles, consumer and institutional, electrical and electronic). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2577 .... 02/2010.................... $4700

World Thermoplastic Elastomers

Global TPE demand will rise 6% yearly through 2013, with China making up 42% of new demand. Excluding China, TPE sales will remain concentrated in the developed markets of the US, Western Europe and Japan, especially for higher performance materials such as TPVs and copolyester elastomers (COPEs). This study analyzes the 3.1 million metric ton world TPE industry, with forecasts for 2013 and 2018 by market, type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2551 .... 10/2009.................... $5800

Foamed Plastics

US foamed plastics demand will reach 8.4 billion pounds in 2013 as key construction and motor vehicle markets recover. Foamed urethane will remain the largest segment while foamed LDPE grow the fastest. Construction will provide the best opportunities based on growth in insulation and carpet underlay applications. This study analyzes the $22.5 billion US foamed plastics industry, with forecasts for 2013 and 2018 by market and product. It also evaluates market share and profiles industry players.

#2532 .... 07/2009.................... $4700

Fluoropolymers

US demand for fluoropolymers will rise 4.5% annually through 2013. Gains will be driven in part by a turnaround in key markets such as motor vehicles and wire and cable, and rising demand in fast-growing emerging markets such as advanced batteries, fuel cells and photovoltaic modules. PTFE will remain the largest type while fluoroelastomers will grow the fastest. This study analyzes the $1.4 billion US fluoropolymer industry, with forecasts for 2013 and 2018. It also evaluates company market share and profiles industry players.

#2496 .... 05/2009.................... $4600

Reinforced Plastics

US demand for reinforced plastics will reach 3.6 billion pounds in 2013. Glass fibers will remain the dominant reinforcement material while carbon fiber and nanomaterial reinforcements grow faster. Reinforced thermosets will remain the largest resin type, with growth slightly outpaced by thermoplastics. This study analyzes the 3.2 billion pound US reinforced plastics industry, with forecasts for 2013 and 2018 by reinforcement, resin and market. It also evaluates market share and profiles industry players.

#2489 .... 05/2009.................... $4600

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