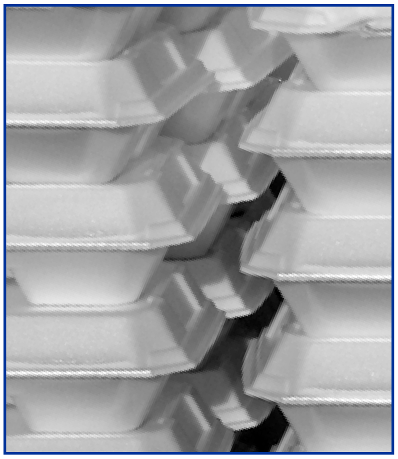

Plastic Foams

US Industry Study with Forecasts for **2012 & 0000**

Study #3114 | December 2013 | $5100 | 329 pages

The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Increased new housing activity, along with rising consumer spending levels, will bode well for foams used in foam insulation and household products such as bedding, furniture, and appliances.

US demand to rise 4.1% annually through 2017

US demand for plastic foams is forecast to rise 4.1 percent annually to 8.6 billion pounds in 2017, valued at $24.7 billion. The market will mount a healthy recovery from the declines posted during the recession-impacted 2007-2012 period. The construction sector is anticipated to enjoy particularly robust growth prospects, as renewed strength in construction activity generates significant opportunities for foam insulation products. Increased new housing activity, along with rising consumer spending levels, will bode well for foams used in household products such as bedding, furniture, and appliances. Gains in this market will also be aided by the expanding popularity of memory foam mattresses, although maturity and import competition will continue to limit domestic plastic foam demand in the furniture and appliance segments. In the motor vehicle market, advances will be promoted by rising vehicle output and efforts to enhance safety and comfort.

Polyurethane to remain leading plastic foams resin

Polyurethane represents the leading resin in the plastic foams market. Flexible polyurethane foam will remain the dominant product type of this resin, outpacing demand gains for its rigid counterpart through 2017 based on especially rapid growth in the bedding and carpet underlay markets, where it is valued for its cushioning properties.

US Plastic Foams Demand, 2017
(8.6 billion pounds)

Strong gains for rigid polyurethane foam will be propelled by a healthy rebound in construction activity and by changes in building codes and construction practices that call for structures to use energy more efficiently. Rigid polyurethane is one of the most effective materials available for roof and wall insulation, insulated windows and doors, and air barrier sealants. However, polyurethane foam insulation will continue to encounter competition from fiberglass and polystyrene foam.

Polystyrene accounts for almost two-fifths of demand for plastic foam and will maintain a sizable share of the market through the forecast period based on its excellent protective and insulative capabilities, moisture resistance, and low cost. However, advances in the large packaging sector will be restricted by ongoing solid waste disposal concerns regarding the use of disposable foam products and rising competition from paper-based materials, which are viewed as more eco-friendly. Through 2017, expanded polystyrene foam is projected to see more rapid gains than its extruded counterpart, stemming primarily from its use in insulation, molded foam protective packaging, and insulated shipping containers. Expanded polystyrene geofoam, which serves as a cost-efficient and lightweight alternative to traditional fill materials in construction applications, is predicted to grow quite rapidly from a relatively small base.

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Sample Text, Table & Chart

POLYURETHANE FOAMS

Furniture. ... for flexible polyureth... forecast to rise ... million pounds in ... will represent a ... e declines recorde... 2002-2012 peri... ng construction ex... in both residen... rs. However, furth... will continue to ... d markets and imp... tion from Asian ... tries with lower la...

SAMPLE TEXT

Flexible polyurethane foam is widely used in furniture c... due to its resiliency, support, compression resistance, memor... ity, and the ability to be produced in varying densities. Slabs... account for the vast majority of furniture cushioning due to t... effectiveness and ease of manufacture. Uses for flexible mol... include seating cushions, armrests, and seat backs for both residential and nonresidential markets.

Flexible polyurethane foam is used in office furniture, couches, upholstered chairs, recliners, and computer and desk chairs. Polyurethane foams can adhere to metal, plastic, or wood structural components, or be used as cushioning over couch and chair springs. Denser flexible polyurethane foams are used in office and institutional furniture because of the higher durability and performance needs. Household furniture foams tend to be softer and less dense, due to greater demand for comfort over durability.

Flexible polyurethane foam competes with cotton, latex f... and polyester. However, flexible polyurethane foam is the cu... material preferred by upholstered furniture manufacturers. U... furniture is the ideal application for flexible foam since a wid... densities can be produced to meet varying comfort requirem...

TABLE VI-1

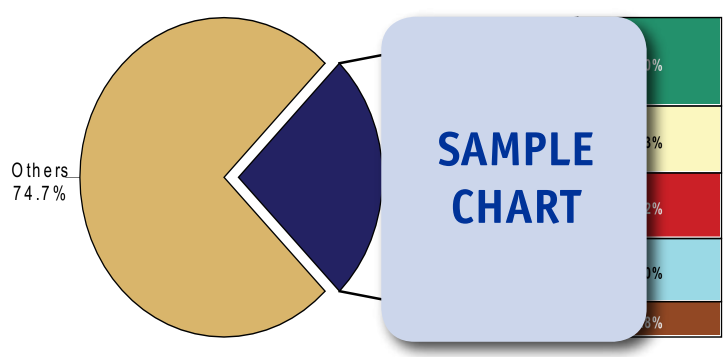
POLYSTYRENE FOAMS DEMAND BY PROCESSING METHOD & MARKET (million pounds)

Item	2002	2007	2012	2017	2022
Plastic Foams Demand					
% polystyrene					
Polystyrene Foams Demand					
By Processing Method:					
Extruded					
Sheet					
Boardstock					
Expanded					
By Market:					
Packaging					
Construction					
Other					
$/lb					
Polystyrene Foams Demand (mil $)					

SAMPLE TABLE

CHART VIII-1

US PLASTIC FOAMS MARKET SHARE ($18 billion, 2012)



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Sample Profile, Table & Forecast

TABLE III-11

FOOD CONTAINER DEMAND BY TYPE
(billion units)

Item	2002	2007	2012	2017	2022
Food Shipments (bil 2005$)					
containers/000$ food					
Food Container Demand					
Bags & Pouches					
Plastic					
Paperboard					
Metal					
Glass					
cents/unit					
Food Container Demand (mil $)					

SAMPLE TABLE

COMPANY PROFILES

Free-Flow Packaging International Incorporated
34175 Ardenwood Boulevard, Suite 201
Fremont, CA 94555
650-261-5300
http://www.fp

Annual Sales:
Employment:

Key Products: ackaging materials

SAMPLE PROFILE

Free-Flow Packaging, which is also known as FP International Incorporated, is a privately held producer of protective packaging products and packaging systems. The Company serves the retail, cosmetic, electronic, pharmaceutical, furniture, automotive, and other markets.

The Company is involved in the US plastic foams industry through the manufacture and sale of CUSHION-LITE polyethylene foam, and SUPER 8 and FLO-PAK loose-fill foam packaging materials. CUSHION-LITE polyethylene foam is a lightweight material used for cushioning, interleaving, and surface protection functions in a variety of applications. In addition, CUSHION-LITE foam is offered in an antistatic electronic grade.

SUPER 8 is a biodegradable foam loose-fill packaging material that is designed to provide enhanced protection while remaining environmentally compliant. This material is made from 100 percent recycled polystyrene that includes post-consumer polystyrene foam packaging that would otherwise have been put into the waste stream cycle. FLO-PAK is made by the Company in standard and electronic grades. Standard FLO-PAK loose-fill foam packaging is produced from

 275

STUDY COVERAGE

This Freedonia study, ***Plastic Foams***, presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by market (e.g., foodservice and consumer disposables, protective packaging, containers, insulation, flooring and carpet backing, bedding, furniture, appliances, motor vehicles) and resin (e.g., polyurethane, polystyrene, polypropylene, HDPE). The study also considers market environment factors, details industry structure, evaluates company market share and profiles 41 industry players, including Carpenter, Dart Container and Reynolds Group.

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Other Studies

Silicones

This study analyzes the US silicones industry. It presents historical demand data for 2003, 2008 and 2013, and forecasts for 2018 and 2023 by product (e.g., fluids, elastomers, resins, gels), market (e.g., industrial, consumer, construction, medical) and application (e.g., vehicles and binders, elastomeric components, lubricants and greases, emollients, surfactants, conditioning agents, polishes, defoamers). It also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3138 .... March 2014.................. $5100

World Bioplastics

Global demand for biobased and biodegradable plastics will rise 19 percent per year to 960,000 metric tons in 2017. Starch-based resins and polylactic acid (PLA) will remain the leading products, while the most rapid gains in demand are expected for biobased commodity resins such as polyethylene and polypropylene. This study analyzes the 408,000 metric ton world bioplastic industry, with forecasts for 2017 and 2022 by product, market, world region, and for 17 countries. The study also evaluates company market share and profiles industry players.

#3089 .... November 2013 .... $6300

World Thermoplastic Elastomers

World thermoplastic elastomer (TPE) demand will rise 5.5 percent per year to 5.8 million metric tons in 2017. The Asia/Pacific region will remain the largest market and will grow the fastest. Styrene block copolymers (SBCs) will continue as the leading TPE product, while polyolefin elastomers (POEs) will grow the fastest. This study analyzes the 4.5 million metric ton world TPE industry, with forecasts for 2017 and 2022 by market, product, world region, and for 15 countries. The study also evaluates company market share and profiles industry players.

#3051 .... August 2013 .... $6400

World Silicones

World demand for silicones will rise 5.9 percent per year to $18.9 billion in 2017. The Asia/Pacific region will remain the largest and fastest-growing market, but the rate of growth will slow. The construction segment will grow the fastest based on a recovery in the silicone-intensive construction sectors of the US and Western Europe. This study examines the $14.2 billion world silicones industry, with forecasts for 2017 and 2022 by market, product, world region, and for 15 countries. The study also evaluates company market share and profiles industry participants.

#3022 .... May 2013 .... $6100

Natural Polymers

US demand for natural polymers is forecast to expand 6.9 percent annually to $4.6 billion in 2016. Cellullose ethers, led by methyl cellulose, will remain the largest product segment. Exudate and vegetable gums will enjoy the most rapid gains in demand. The oilfield market will grow the fastest, driven by rising demand for guar gum in hydraulic fracturing fluids. This study analyzes the $3.3 billion US natural polymer industry, with forecasts for 2016 and 2021 by market and product. The study also evaluates company market share and profiles industry players.

#2963 .... November 2012 .... $4900

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