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Plastic Film

Industry Study with Forecasts for **2018 & 2023**

Study #3243 | January 2015 | $5300 | 411 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
Email: info@freedoniagroup.com

www.freedoniagroup.com

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NONFOOD PACKAGING

SECONDARY PACKAGING

NONPACKAGING

INDUSTRY STRUCTURE

Plastic Film

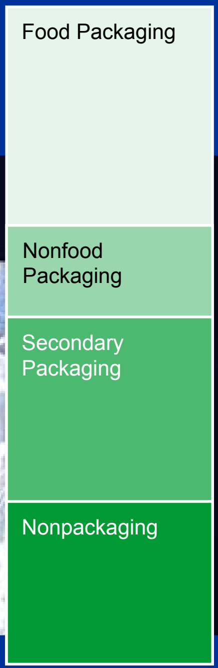
Industry Study with Forecasts for ***2018 & 2023***

Gains in plastic film demand will be driven by accelerating growth in manufacturing output and disposable incomes, as well as by increased penetration of pouches into new markets.

US demand to reach 15.4 billion pounds in 2018

US demand for plastic film is expected to grow 1.5 percent per year through 2018 to 15.4 billion pounds, valued at $24.9 billion. Accelerating growth in manufacturing output and disposable incomes bodes well for plastic film sales in a wide range of markets. Expected price stabilization stemming from elevated plastic resin supply will improve the cost-competitiveness of plastic film versus other materials. Increased penetration of pouches into new markets will also boost demand for plastic film.

US Plastic Film Demand by Market
(15.4 billion pounds, 2018)



LLDPE will remain dominant film resin

Linear low density polyethylene (LLDPE) is the largest volume film resin, comprising 45 percent of total resin usage in 2013, and LLDPE will maintain solid growth through 2018. LLDPE's high strength and source reduction capabilities have helped spur gains in multiple markets, including pouches for food products and pharmaceutical packaging. Demand for low density polyethylene (LDPE) is expected to grow more slowly as it is replaced by LLDPE in some segments and reaches market maturity in many of its primary markets. Above average growth is forecast for polypropylene film, driven by its use in packaging for the increasingly popular fresh produce market and its growth in snack food packaging. High density polyethylene (HDPE) film is expected to exhibit minimal growth through 2018, with increasing opposition to single use plastic retail bags offsetting gains in food packaging markets.

Polyethylene terephthalate film demand will post near average growth through 2018, with healthy gains in food packaging replacing demand from the declining magnetic tape and photographic film markets. Below average growth is expected for polyvinyl chloride (PVC), hampered by competition in nonfood applications such as pharmaceutical and medical products. Degradable plastic resins will experience the highest growth rate of all film types, with falling prices prompting packaging converters to adopt their use.

Food packaging market to grow the most rapidly

The food packaging market will exhibit the fastest growth in film demand, driven by the expanding popularity of pouches for a variety of food items, as well as the rise of active and intelligent packaging. Nonfood packaging will see solid growth stem from strong demand for pharmaceutical and medical packaging. Slower growth is forecast for nonpackaging film due to the maturity of trash bag applications and the decrease in photographic and magnetic film, as these are only partially offset by robust gains for construction film. Secondary packaging will see the slowest gains, with flat or negative growth in garment bags and retail bags.

Sample Text, Table & Chart

SAMPLE TEXT

NONPACKAGING

Construction & Industrial Film

Plastic film demand in construction and industrial mark
on pounds in 2018. Film gro
ling construction activity. S
truction is integrated into bu
e floors, between walls, and
plastic film in construction
terials at job sites and weat
truction and industrial mark
e and disposable functions.
nd to use thick films; 10-mi
lm gauge.

lene film is the primary film
because of the resin's low co
pplication, and good barrier
and industrial film will grow
n 2018. LDPE demand grow
percent annually over the same period. LDPE film is used in applications in which transparency is an important attribute, for example, a window covering or a cover for equipment and supplies.

Both LLDPE and LDPE film are used in a multitude of construction applications, including moisture or vapor barriers, window coverings, tarpaulins for the covering of supplies such as lumber, and weatherproof coverings for buildings under progress. Construction
also is useful for protecting workers from the element
protecting work in progress (e.g., covering a freshly p
driveway to prevent fast drying and rain damage), and
and lead removal projects. Vapor barriers are also fre
concrete floors, between walls, and alongside outer fo

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TABLE III-3

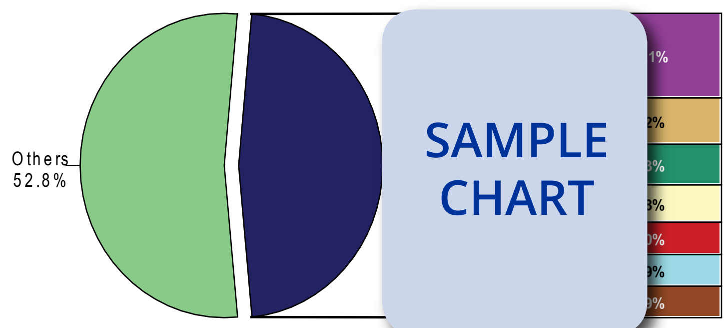
LINEAR LOW DENSITY POLYETHYLENE FOOD PACKAGING FILM DEMAND BY APPLICATION
(million pounds)

SAMPLE TABLE

Item	2003	2008	2013	2018	2023
Food & Beverage Shipments (bil 2009$)					
lb LLDPE/000$ food & beverage					
LLDPE Film in Food Packaging					
Baked Goods					
Meat, Poultry, & Seafood					
Produce					
Snacks					
Frozen Food					
Dairy Products					
Grain Mill Products					
Confections					
Pet Food					
Beverages					
Other Foods					
% food packaging					
LLDPE Film Demand					

CHART IX-1

US PLASTIC FILM MARKET SHARE
($21.4 billion, 2013)



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Sample Profile, Table & Study Coverage

TABLE VII-1

SECONDARY PACKAGING FILM DEMAND BY APPLICATION
(million pounds)

Item	2003	2008	2013	2018	2023
Manufacturers' Shipments (bil 2009$)					
lb film/mil $ manufacturers' shipments					
Secondary Packaging Film Demand					
Retail Bags					
Stretch Wrap					
Industrial Liner					
Shrink Wrap					
Garment Bags					
Other					
% secondary packaging					
Plastic Film Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

FLEXcon Company Incorporated
1 FLEXcon Industrial Park
Spencer, MA
508-885-8200
http://www.fle

Annual Sales: 11/14)
Employment:

Key Products: ilms

SAMPLE PROFILE

FLEXcon -sensitive films and adhesives, which are primarily used as tapes, tags, and labels for graphic films, electronic printing, packaging, and performance products. The Company offers both standard off-the-shelf and custom manufactured adhesive products.

The Company is active in the US plastic film industry via the production of standard and custom pressure-sensitive films from polypropylene, polyethylene, polyvinyl chloride (PVC), polycarbonate, polyester, polyimide, polyolefin, and other materials. These films can be used in the manufacture of labels for the food and beverages, health and beauty products, consumer electronics, durable goods, household chemicals, aerospace, automotive, medical devices, industrial equipment, pharmaceuticals, and graphic arts markets, among others.

Representative products from FLEXcon include SHELF SELECT PVC films, which are designed for labeling dry goods, dairy products, and frozen foods; COMPUCAL EXCEL matte, topcoated films, which are engineered for thermal transfer, laser, impact, and electron beam imaging applications; DPM high-performance films, which are suitable for product identification, safety, hazard, instructional labeling end uses

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STUDY COVERAGE

Plastic Film is a Freedonia study that presents historical demand data (2003, 2008 and 2013) and forecasts (2018 and 2023) by resin and market. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 42 industry players, including Bemis, Sigma Plastics, and Sealed Air.

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Related Studies

Tube & Stick Packaging

Demand for tube and stick packaging in the US is projected to advance 4.0 percent per year to $2.1 billion in 2018. Stick packs will grow the fastest from a small base, while squeeze tubes will remain by far the largest segment. The relatively small food market will grow the fastest, while the cosmetics and toiletries market will remain dominant. This study analyzes the $1.7 billion US tube and stick packaging industry, with forecasts for 2018 and 2023 by product, material, and market. The study also evaluates company market share and profiles industry players.

#3252 ....January 2015 .... $5200

World Protective Packaging

World demand for protective packaging will rise 6.1 percent annually to nearly $27 billion in 2018. The Asia/Pacific region will see the fastest gains. The online retail market will continue to grow rapidly from a small base and boost the whole retail segment, while manufacturing remains the dominant market. This study analyzes the $20 billion world protective packaging industry, with forecasts for 2018 and 2023 by product, material, function, market, world region, and for 24 countries. The study also evaluates company market share and profiles industry participants.

#3215 ....October 2014 .... $6300

Pet Food Packaging

US demand for pet food packaging will rise 4.8 percent annually to $2.5 billion in 2018. Pouches will be the fastest growing packaging type based on their consumer convenience features and light weight. For small packages of dry food, pouches will continue to supplant bags. Chilled and frozen pet food will be the fastest growing application. This study analyzes the $2 billion US pet food packaging industry, with forecasts for 2018 and 2023 by packaging material, type and application. The study also evaluates company market share and profiles industry competitors.

#3170 .... July 2014.................... $5200

World Pressure Sensitive Tapes

World demand for pressure sensitive adhesive (PSA) tapes is projected to increase 5.0 percent annually to more than 50 billion square meters in 2018. Growth will remain the fastest in China, India and other rapidly developing countries, while more developed markets such as the US will see accelerating gains. This study analyzes the 39.3 billion square meter world PSA tape industry, with forecasts for 2018 and 2023 by tape type, backing material, world region, and for 22 countries. The study also evaluates company market share and profiles industry competitors.

#3163 .... May 2014.................... $6300

Active & Intelligent Packaging

US active and intelligent packaging demand is forecast to increase 8.0 percent annually to $3.5 billion in 2017. Intelligent packaging will record double digit annual gains, led by time-temperature indicator labels. Gas scavengers, susceptor packaging and self-venting packaging will be among the fastest growing active packaging types. This study analyzes the $2.4 billion US active and intelligent packaging industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3117 ....January 2014 .... $5100

About The Freedonia Group

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