

Plastic Foams

US Industry Study with Forecasts for 2020 & 2025

Study #3405 | June 2016 | \$5300



Plastic foam competes with fiberglass

The volatile market for building and construction affects demand for foam insulation, flooring, appliances and furnishings. Regulations encouraging higher energy efficiency and consumer demand for better sound insulation will maintain plastic foam as a strong competitor to fiberglass insulation. Consumer interest in green construction techniques, better interior air quality, and the media interest shown to topics like the “tiny house movement” will drive demand for affordable, high performance insulation. Consumer demand for luxury feel and noise reduction will fuel increases for foam used in flooring.

Fuel efficiency mandates spur demand

The motor vehicle market will respond to fuel efficiency mandates by using foams that are both structural and insulating for the production of lighter vehicles. Sales for foams used in appliances, furnishings, and other durable goods are expected to rise driven by the superior qualities of comfort and insulation delivered by plastic foam.

Waste-based regulations threaten growth

Demand for plastic foams in packaging markets is predicted to remain significant but to slow going forward based on regulations and municipal mandates aimed at reducing landfill waste. Waste-based regulations will drive down the use of foam in disposable packaging, at least until newer grades of recyclable and biodegradable foams have proven themselves in the market. This loss will be compensated in part by increasing demand for protective packaging for durable goods.

New products being developed

There are general industry trends that predict expanding production capacity for polyurethane foams, developing renewably sourced foam raw materials, and consolidating foam production. Innovations currently in commercialization include biodegradable foams for packaging, the use of new chemical blowing agents that do not deplete ozone, and use of biofoams based on mushrooms.

Suppliers use technology to meet demand

Expansion of the foamed plastics market will be fostered by rising construction expenditures, consumer spending, and durable goods output. To meet the projected demand, foam suppliers will leverage technical advances in foam processing and renewable bio-based raw materials to provide the market with new foams that are higher performing and more environmentally sustainable than existing products.

Study coverage

This study analyzes the US market for plastic foams. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by market (construction, packaging, household products, motor vehicles, other) for polyurethane foams (flexible and rigid), polystyrene foams (extruded and expanded), as well as other plastic foams. The study also considers key market environment factors, details the industry structure, evaluates company market share and profiles US industry competitors.

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POLYURETHANE FOAMS

Rigid Polyurethane Foams

Demand for rigid polyurethane foams is projected to climb 1.7 percent annually through 2025, which is by far the highest rate of growth among all plastic foams. The majority of new capacity is expected to be propelled by a healthy building codes market. The use of energy more efficient insulative materials available for roof and wall insulation, insulation for windows and doors, and air barrier sealants. However, polyurethane foam insulation will continue to encounter competition from fiberglass and polystyrene foam. Opportunities for rigid polyurethane foam are also anticipated in other areas such as industrial applications, packaging, and transportation equipment.

Rigid polyurethane foams include both rigid polyurethane and isocyanurate (ISO) foams. Both materials are hard, closed-cell foams with the main difference being that ISO foams are slightly more rigid and have better structural integrity. ISO foams are often specified for roof insulation to constitute a part of the loadbearing structure. For rigid polyurethanes are manufactured as rigid laminated panels, sheet stock (insulation board and pipe covering), and spray-in-place (spray panels, freezer and refrigeration insulation, and tank insulation) products. Laminated panels are used in building construction applications, and plastic foam is laminated on one or two sides with wood, plastic, or metal to improve structural integrity.

Producers of rigid polyurethane foams and products (e.g., polyisocyanurate foam) include Atlas Roofing (Hood Companies), Bayer, Dow Chemical, BASF, Firestone Building Products (Bridgestone), Hunter Panels (Carlisle Companies) and Johns Manville (Berkshire Hathaway).

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE III-2

PACKAGING MARKET FOR PLASTIC FOAMS BY RESIN & APPLICATION (million pounds)

Item	2005	2010	2015	2020	2025
Plastic Packaging Shpts (bil 2009\$) lbs foam/000\$ plastic packaging					
Plastic Foams in Packaging By Resin:					
Extruded Polystyrene					
Expanded Polystyrene					
Rigid Polyurethane					
High Density Polyethylene					
Low Density Polyethylene					
Flexible Polyurethane					
Polypropylene					
Biodegradable					
By Application:					
Foodservice & Consumer Disposables					
Protective Packaging					
Containers					
% packaging					
Plastic Foams Demand					

Source: The Freedonia Group

TABLE VI-1

OTHER PLASTIC FOAMS DEMAND BY RESIN (million pounds)

Item	2005	2010	2015	2020	2025
Total Plastics Demand % foams					
Other Plastic Foams Demand					
Polypropylene					
High Density Polyethylene					
Engineering Plastics					
Vinyl					
Low Density Polyethylene					
Acrylonitrile-Butadiene-Styrene					
Biodegradable Plastic					
All Other					
\$/lb					
Plastic Foams Demand (mil \$)					

Source: The Freedonia Group

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Related Studies

Silicones

US demand for silicones will climb 4.5 percent annually to \$4.4 billion in 2020, with volume rising 2.6 percent per year to 908 million pounds. This will be a moderation from the previous 5-year pace. Silicone elastomers and resins will remain the fastest growing products. The industrial market will remain dominant, but will be outpaced by medical and construction uses. This study analyzes the \$3.5 billion US silicone market, with forecasts for 2020 and 2025 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3391..... March 2016..... \$5300

World Thermoplastic Elastomers

World thermoplastic elastomer (TPE) demand will grow 5.2 percent annually to 6.7 million metric tons in 2019. Styrenic block copolymers will remain the largest segment, while thermoplastic vulcanizates and polyolefin elastomers will grow the fastest. China will remain the largest and fastest growing market. This study analyzes the 5.2 million metric ton world TPE industry, with forecasts for 2019 and 2024 by market and product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

#3326..... November 2015..... \$6500

Fluoropolymers

US demand for fluoropolymers will rise 5.3 percent per year to \$2.3 billion in 2019, with volume totaling 180 million pounds. Polytetrafluoroethylene (PTFE) will remain the largest value segment, while polyvinylidene fluoride (PVDF) and polyvinyl fluoride (PVF) will grow at the fastest rates. The construction and electrical/electronic markets will grow the fastest. This study analyzes the \$1.8 billion US fluoropolymer industry, with forecasts for 2019 and 2024 by product, application and market. The study also evaluates company market share and profiles industry players.

#3278..... June 2015..... \$5300

Engineering Plastics

Demand for engineering plastics in the US is expected to rise 2.6 percent per year to 5.1 billion pounds in 2019. Nylon, ABS, and polycarbonate will remain the three largest engineering plastics by volume, with nylon the fastest growing of the three. Smaller-volume engineering plastics such as polyphenylene sulfide, sulfone polymers, and fluoropolymers will grow the fastest. This study details the 4.5 billion pound US engineering plastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players.

#3242..... April 2015..... \$5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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