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.
Plastic Foams
US Industry Study with forecasts for 2020 and 2025

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Rigid Polyurethane Foams

Demand for rigid polyurethane foam is anticipated to climb 4.9 percent annually to 2.1 billion pounds in 2017. The construction market, which is by far the leading outlet for rigid foam, will account for the majority of new demand between 2012 and 2017. Strong gains will be propelled by a healthy rebound in construction activity and by changes in building codes that call for structures to use energy more efficiently. One of the most effective insulation 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. 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 polyisocyanurate (ISO) foams. Both materials are hard, closed-cell foams, with the main difference being that ISO foams are slightly more stable and have better structural integrity. ISO foams are often specified for roof insulation to constitute a part of the loadbearing structure. For this reason, rigid polyurethanes are manufactured as rigid laminated panels, slabs (insulation board and pipe covering), and spray-in-place (thermal Foam laminated panels, freezer and refrigeration insulation, and tank insulation) panels. Laminated panels are used in building construction applications, and the 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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- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
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