Natural Polymers

US Industry Study with Forecasts for 2020 & 2025

Study #3415 | May 2016 | $5300

Shifts in natural polymer landscape

The fracking boom in North America reached its apex in the 2010-2015 period. Now the key natural polymers used in oilfield applications, guar gum and xanthan gum, will see more moderate growth going forward. However, the rising popularity of gluten-free foods should drive use of xanthan gum. Increasing demand for green alternatives in industries such as packaging and textiles will catapult other natural polymers into strong double-digit growth in the forecast period. Furthermore, food ingredients that offer pleasing eating and drinking experiences will propel growth for pectin. In addition, cellulose ethers will be supported by ongoing demand for water-based, low VOC coatings.

New product introductions

Recent products include the 2015 US FDA-approved JUVEDERM ULTRA XC, which is made from hyaluronic acid, manufactured by Allergan for lip augmentations that lasts up to a year. Hyaluronic acid is exhibiting a surge in popularity as not only a dermal filler but also a moisturizer in topical applications. In food and beverage applications, to combat supply constraints and meet demands of the marketplace, TIC Gums has introduced a variety of pectin substitutes that contain natural polymers such as alginates, agar, and locust bean gum.

Weather & politics affect demand

Much of the change in natural polymer demand and pricing is due to the current state of supply, which is subject to various regions' weather and geopolitical situations. Many natural polymers are indigenous to certain parts of the world. Poor crop yields in key growing areas have caused supply pinches and price inflation in pectin, for example, and has caused end users to seek out alternatives. Oil and gas producers, too, briefly sought out alternative solutions, namely to guar gum, as prices rose nearly tenfold between 2011 and 2012! Guar gum is mainly imported and openly traded on exchanges in India, where regulators suspended trading before it returned to lower price levels in 2013.

Study coverage

This study analyzes the US market for natural polymers. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by market (food and beverages, medical, oilfield, cosmetics and toiletries, coatings and inks, construction, adhesives, packaging, textiles, other) and product (cellulose ethers, starch and fermentation polymers, exudate and vegetable gums, protein-based polymers, marine polymers, other). The study also assesses key market environment factors, analyzes the industry structure, evaluates company market share and profiles US industry competitors.

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MARKETS

Food and Beverages: Natural Polymer Demand

Demand fc ... nd beverage mark
forecast to rise ... in 2020, reaching
million pounds. ... e industry represe
a large and mat ... ported by trends t
favor natural in ... popularity of fun
foods. Confect ... n the leading outl
natural polymer ... rising use of thes
polymers as em ... ymethyl cellulose
and xanthan gum represent the leading product types and will mai
strong positions going forward, continuing to benefit from their su
ity as substitutes for guar gum. Demand for xanthan gum will als
supported by its use as a substitute for wheat gluten in gluten-free
which are sustaining their popularity.

SAMPLE TEXT

Demand for CMC and xanthan gum, as well as other gum typ
will be aided by the desire among food and beverage processors t
reformulate their products in an effort to reduce or diversify away
an over-reliance on any single natural polymer additive. Processo
forced to shift away from guar gum due to concerns regarding the
and availability of the hydrocolloid in the early part of this decade
trend toward hydraulic fracturing in the oil and gas industry gener
ated significant demand for guar gum, which in turn resulted in su
concerns and drove prices sharply upward. More recently, the san
cerns for pectin, for example, have prompted companies like TIC
to offer food additive pectin substitutes. As such, food and beverage producers seeking out products with more stable supply and pricing are increasingly utilizing alternatives like CMC and xanthan gum, as well as agar, carrageenan, locust bean gum, starches, tara gum, and various blends developed by natural polymer suppliers.

TABLE IV-8

STARCH & FERMENTATION POLYMER DEMAND
(million dollars)

Item	2005	2010	2015	2020	2025
Packaging Shipments (bil 2009$)					
lb starch & ferm/000$ pkg					
Starch/Fermentation Polymers (mil lb)					
$/lb					
Starch & Fermentation Polymer Demand					
Starch Derivatives					
Xanthan Gum					
Polylactic Acid					
Hyaluronic Acid					
Other					
% starch & fermentation					
Natural Polymer Demand					

SAMPLE TABLE

Source: The Freedonia Group

TABLE III-12

COSMETIC & TOILETRY DEMAND FOR NATURAL POLYMERS
(million dollars)

Item	2005	2010	2015	2020	2025
Cosmetic & Toiletry Shpts (mil 2009$)					
lb polymer/000$ cosmetic & toiletry					
Natural Polymer Demand (mil lb)					
$/lb					
Natural Polymer Demand					
Protein-Based Polymers					
Cellulose Ethers					
Starch & Fermentation Products					
Marine Polymers					
Other					

SAMPLE TABLE

Source: The Freedonia Group

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

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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

Custom Thermoplastic Compounding

US demand for custom compounded thermoplastics will rise 3.2 percent annually to 10.6 billion pounds in 2019, valued at nearly $19 billion. The construction market will grow the fastest, nearly twice the pace of the next fastest growing market, wire and cable. Compounded thermoplastic PVC will continue to offer the best growth opportunities. This study analyzes the 9.1 billion pound US custom compounded thermoplastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players.

#3336.............. October 2015 .... $5300

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

About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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