

# Barrier Films Market in the US

---

## Industry Study with Forecasts for 2021

---

Study #3513 | April 2017 | \$5300

---



Growth in US demand for barrier films will be supported by greater demand for high performance films, as barrier requirements intensify across multiple markets. Improvements to processing technologies will support low-cost production and expand the range of suitable applications.

### Flexible food packaging to remain demand driver

Food packaging accounts for the vast majority of barrier film demand due to the ongoing shift from rigid to flexible food packaging. Strong incentives for producers, retailers, and consumers to extend shelf life and reduce food waste will continue to support demand for higher performing films, as will a growing preference for fresher foods that use fewer preservatives. Flexible packaging formats such as stand-up pouches that accommodate consumers' busy lifestyles will offer the best opportunities going forward.

### Smaller but faster growing markets to diversify usage

Pharmaceutical and medical products, the second largest market after food packaging, accounted for 17% of total demand in 2016 and will grow at a strong pace based on increased healthcare spending and new drug formulations that require higher barrier packaging.

Barrier films will also carve out space in particularly promising outlets such as flexible electronics. In addition to robust demand for traditional solar panels that use

barrier films as a protective covering for glass modules, new flexible varieties composed entirely of plastic are gaining popularity; these panels require some of the most expensive and highest performing resins on the market.

Above average gains are expected for PET based on its versatility as a commodity resin that features moderately good barrier properties. For less rigorous applications, it can serve as the primary barrier layer. Alternatively, high performance applications such as photovoltaic films use PET as the basic substrate for cost reduction purposes. EVOH will grow faster than any other major resin type because it is an excellent gas barrier. Although it is expensive, a thin layer can achieve maximum barrier properties. Moreover, EVOH can be coextruded with commodity resins on traditional processing equipment.

### Study coverage

This Freedonia industry study analyzes the US barrier film market. It presents historical demand data (2006, 2011, 2016) and forecasts (2021) by barrier film type (oxygen and other gas, moisture, corrosion), market (electronics, food packaging, pharmaceutical and medical products, construction, primary metal products, agriculture), and resin (polyethylene, polypropylene, polyester, PVC, nylon, PVDC, EVOH). The study also evaluates company market share and analyzes industry competitors including Bemis, Berry Global, Charter NEX, DuPont, Printpack, Sealed Air, and Toray.

**Table 5-3 | Polyethylene Barrier Film Demand by Market, 2006 - 2021 (million pounds)**

Item	% Compound Annual Growth						
	2006	2011	2016	2021	06-11	11-16	16-21
Polyethylene Barrier Film Demand							
Food Packaging:							
Meat, Poultry, Seafood							
Snack Food							
Produce							
Baked Goods							
Dairy Products							
Other Food							
Pharmaceutical & Medical							
Construction							
Primary Metal							
Other							

Source: The Freedonia Group

**BARRIER FILM TYPES**

**Moisture Barrier Films**

**Moisture Barrier Films: Demand Forecast**

In 2016, moisture barrier films accounted for 19% of total barrier film demand. Moisture barrier films are used in food and pharmaceutical packaging. Nonpackaging applications include vapor retarders in the construction market; ostomy pouches in the medical supply market; and protective films for electronic devices, among others such as

is forecast to annually rise above the barrier film average construction industry and electronics market.

tion market will be driven by the construction industry.

market can be attributed to OLED displays, which are impeded by expensive

od packaging still accounts for 6% of the total in 2016. Mo

riers are used primarily in the snack food packaging market to provide the crisp, crunchy texture of chips, pretzels, and other snack foods. Other food packaging applications include dry pet foods, cereals, and cake mixes.

Gains in the pharmaceutical and medical market will also remain healthy, driven by increased production of pharmaceuticals and medical supplies. Applications include blister packages and a variety of medical supplies, such as ostomy pouches.

©2017 The Freedonia Group. All rights reserved.

**Table 3-4 | Oxygen & Gas Barrier Film Demand in Food Packaging, 2006 - 2021 (million dollars)**

Item	% Compound Annual Growth						
	2006	2011	2016	2021	06-11	11-16	16-21
Food Packaging Gas Barrier Film							
Meat, Poultry, & Seafood							
Snack Food							
Dairy Products							
Baked Goods							
Candy & Confection							
Produce							
Other Food							

Source: The Freedonia Group

**Table 4-2 | Food Packaging Market for Barrier Films, 2006 - 2021 (million dollars)**

Item	% Compound Annual Growth						
	2006	2011	2016	2021	06-11	11-16	16-21
Food Packaging Barrier Film Demand							
Meat, Poultry, & Seafood							
Snack Food							
Dairy Products							
Baked Goods							
Candy & Confection							
Produce							
Other Food							
% food packaging							
Total Barrier Film Demand							

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

# The Freedonia Group

## Upcoming Research for 2017

Freedonia's **KNOWLEDGE CENTER** offers a state-of-the-art **Subscriber Portal** that delivers powerful ROI while saving your organization countless hours of research.

### Construction and Building Products

#### New Titles

- Kitchen & Bath Remodeling in the US
- Roofing Distribution in the US
- Siding Distribution in the US
- Portable HVAC Equipment in the US
- Asphalt Shingles Market in the US

#### Updates

- Global Countertops Market
- Global Flooring Market
- Pipe Markets in the US
- Plumbing Fixtures & Fittings in the US
- Siding Market in the US
- Windows & Doors Market in the US
- Global Elevators

### Packaging and Consumer Goods

#### New Titles

- Global E-Commerce
- Packaging Films Market in the US
- Consumer Wipes Market in the US
- Meat Packaging Market in the US
- Poultry Packaging Market in the US

#### Updates

- Foodservice Disposables in the US
- Global Caps & Closures
- Labels in the US
- Global Power Tools
- Home Organization Products in the US

### Chemicals, Polymers, Energy

#### Updates

- Global Activated Carbon
- Global Lubricants
- Global Architectural Paint
- Oilfield Chemicals Market in the US
- Proppants Market in the US
- Roofing Coatings Market in the US

### Industrial Equipment and Transport

#### Updates

- Global Construction Machinery
- HVAC Equipment in the US
- Lawn & Garden Equipment in the US
- Global Buses
- North American Automotive Aftermarket
- North American Truck Aftermarket

# Barrier Films Market in the US

Industry Study with Forecasts for 2021

Study #3513

April 2017

\$5300



## Related Studies

### Poultry Packaging Market in the US

US poultry packaging demand will rise 3.6% yearly to \$4.3 billion in 2021. Consumer preference for easy meal preparation will help to raise gains for poultry packaging overall, while in the fresh poultry market, increased use of individual portion packaging has spurred demand for vacuum pouches. This study offers historical data plus forecasts for 2021 by product, market and application. The study assesses technologies used in poultry packaging, evaluates company market share and provides competitive analysis on industry participants.

#3503..... March 2017..... \$4900

### Natural Polymers

US demand for natural polymers is forecast to rise at a 4.3 percent yearly rate through 2020. Growth will be stimulated by demand in the large food and beverage industry, while most product types will also benefit from strong demand in the medical market. However, a decline in oil and gas production will restrain overall natural polymer gains. The study provides historical data plus projections for 2020 and 2025 for demand by market and product. This study also assesses key market environment factors, evaluates company market share, and profiles US industry competitors.

#3415..... May 2016..... \$5300

### Pouches

Demand for pouches in the US will grow 4.4 percent annually through 2020 to \$10.1 billion. Growth will be driven by the introduction of pouch packaging into new markets and the integration of high value features, such as resealable closures and spouts, in more mature markets. Stand-up pouches will remain the fastest growing type. This study analyzes the \$8.2 billion US pouch market, with forecasts for 2020 and 2025 by product type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

#3383..... February 2016..... \$5400

### Converted Flexible Packaging

US demand for converted flexible packaging will rise 3.3 percent annually to \$20.7 billion in 2019. Pouches will experience above average gains, benefiting from the increased prevalence of value-added features. The nonfood packaging market will slightly outpace the dominant food packaging segment. This study analyzes the \$17.5 billion US converted flexible packaging industry, with forecasts for 2019 and 2024 by material, product, and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3333..... October 2015..... \$5500

## Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

website: [freedoniagroup.com](http://freedoniagroup.com)

## 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:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

The Freedonia Group is a division of [MarketResearch.com](http://MarketResearch.com)

## About MarketResearch.com

With offices in London, New York City, and Washington D.C., [MarketResearch.com](http://MarketResearch.com) is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, [MarketResearch.com](http://MarketResearch.com) offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.



[Click here to purchase study online](#)