Plastic Film

US Industry Study with Forecasts to **2010 & 2015**

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US Industry Study with Forecasts to ***2010 & 2015***

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List of Tables & Charts

Total plastic film demand (e.g., resins, additives, processing) will expand 4.5 percent per annum to $28.6 billion, driven by cost, performance and source reduction advantages over rigid packaging.

US demand to reach 15.2 billion pounds in 2010

Plastic film demand in the US is forecast to increase 2.6 percent annually to 15.2 billion pounds in 2010, valued at $12 billion (resin cost only). Total plastic film demand (including resins, additives, and processing and other costs) will expand 4.5 percent per annum to $28.6 billion. Advances will result from cost, performance and source reduction advantages over rigid packaging. Low density polyethylene will remain the leading film, accounting for 64 percent of the total in 2010, with polypropylene presenting the best opportunities. Average film prices are expected to moderate following the steep price increases between 2004 and 2006, that were caused by spikes in raw material and energy costs.

US Plastic Film Demand, 2005
(13.4 billion pounds)

Polypropylene, HDPE film among fastest growing

Low density polyethylene film demand is projected to rise 2.8 percent per annum through 2010 to 9.7 billion pounds based on its competitive cost structure, versatility and opportunities in areas such as produce and snack packaging, stretch and shrink wrap, and trash bags. Slightly faster increases are expected for high density polyethylene film due to good growth in areas such as baked goods packaging and retail bags. Polypropylene film demand will expand 3.4 percent annually to 1.5 billion pounds in 2010, driven by produce, grain mill, dairy product and other food packaging applications.

Polyester film demand will decline through 2010 as a result of decreasing use in photographic film and magnetic tape brought about by the diffusion of new technologies such as digital cameras, CDs and DVDs. Nonetheless, opportunities are anticipated in food packaging applications, particularly snack foods, confections and frozen food, due to polyester's higher barrier properties. Polyvinyl chloride film demand will advance marginally as a result of slow red meat consumption and competition from polyolefin films.

Secondary packaging to offer best opportunities

Packaging accounted for 73 percent of all plastic film use in 2005 due to cost, convenience and source reduction advantages over other materials. Best growth is expected in secondary packaging applications based on opportunities in stretch and shrink wrap, and retail bags. Food packaging will grow at an above average pace, driven by continued expansion in produce, confections and frozen food segments. Nonpackaging film advances will be fueled by trash bag growth, and constrained by declining photographic film and magnetic tape applications.

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Sample Text, Table & Chart

TABLE V-4

SNACK FOOD FILM DEMAND BY RESIN
(million pounds)

Item	1995	2000	2005	2010	2015
Snack Food Shipments (bil 2000$)	10.4				
lbs film/000$ food shpts	66				
Snack Food Film Demand	684				
Polypropylene	412				
Low Density Polyethylene	152				
High Density Polyethylene	74				
Polyester	33				
Cellophane	13				
% snacks	23.8				
Food Packaging Film Demand	2868				

SAMPLE TABLE

TYPES & APPLICATIONS

Secondary Packaging

Demand for low density polyethylene film in secondary
uses is projected to ... billion
in 2010, driven by ... rap. S
demand will grow ... pound
a result of its high ... incture
and competitive co... ms wil
more widely used ... ics, w
resin consumption ...

SAMPLE TEXT

Demand for LL... percent yearly to 215 million pounds in 2010 based on cost and performance advantages in uses such as pallet wrap and product packaging. Further shrink wrap advances will be threatened by competition from stretch wrap, which has lower energy and equipment costs, and can be manually applied. Pallet wraps are used to fully encase a loaded pallet of boxes or other smaller shipping containers to provide greater load stability and protection from moisture or other damage.

Demand for low density polyethylene film in the production of retail bags (grocery, T-shirt, handle, drawstring and other retail bags) will advance 2.8 percent per annum to 920 million pounds in 2010. Retail bag advances will reflect retail sales growth and cost and performance advantages over paper bags. T-shirt bags will provide the best opportunities, with slower growth anticipated for handle and drawstring, and other self service bags due to their higher cost and saturated applications. Handle and drawstring bags are primarily used in premium department stores and other specialty stores. These bags often carry the store's name and/or logo and are made from thicker films, reinforcing the quality image. Further LDPE retail bag advances will be threatened by competition from high molecular weight high density polyethylene (HMW-HDPE) bags, which have greater strength and tear resistance.

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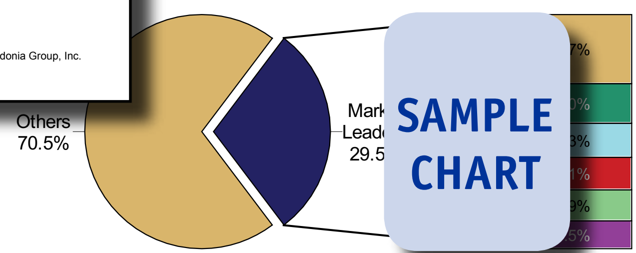
CHART IX-1

US PLASTIC FILM MARKET SHARE, 2005
($23 billion)*



* market share figures include resins, additives & processing

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Sample Profile, Table & Forecast

TABLE VII-2

RETAIL BAG FILM DEMAND BY RESIN (million pounds)

Item	1995	2000	2005	2010	2015
Retail Bag Demand (bil units)	112				
% plastic	80.4				
Plastic Bag Demand (bil units)	90				
ounces/bag	0.25				
Retail Bag Film Demand	1400				
High Density Polyethylene	750				
Low Density Polyethylene	650				
% retail bags	44.5				
Secondary Packaging Film Demand	3148				

SAMPLE TABLE

COMPANY PROFILES

Atlantis Plastics Incorporated
1870 The Exchange, Suite 200
Atlanta, GA 30339
770-953-4567
http://www.atlantisplastics.com

Sales: $424 million (2005)
Employment: 1,460 (2005)

Key Products: stretc ... r specialty films, and institutional proc ...

Atlantis Plastics ... in the production of specialty and custo ... tes in three segments: Plastic Films ... xtrusion.

The Company p ... industry through the Plastic Films seg ... 273 million in 2005. The segmen ... ree divisions: Stretch Films, Custo ... s. Products manufactured by thes ... monolayer and multilayer specialty f ... products made from custom films.

Atlantis Plastics ... the largest producers of stretch f ... lyethylene-based products, whic ... onoextrusion and coextrusion technologies, are marketed under the LINEAR brand name. Specific products in this line for machine application include LINEAR ECLIPSE one-sided cling stretch film; LINEAR ADVANTAGE ULTIMATE one-sided cling films for high-speed, non-standard loads;

SAMPLE PROFILE

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"Demand for low density polyethylene film in retail bag applications is forecast to grow 2.8 percent yearly to 920 million pounds in 2010, driven by greater use of linear low density polyethylene, which has a softer touch and improved puncture resistance over conventional low density polyethylene. Metallocene grades of LLDPE are increasingly being used due to their better downgauging potential and puncture resistance capabilities."

--Section VII, pg. 176

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Other Studies

Foodservice Disposables

Foodservice disposables demand in the US will grow 3.8% annually through 2011 as more food is eaten or prepared away from home. Packaging will lead gains and surpass serviceware as the largest category by 2011. The eating and drinking places market will remain dominant while the retail and vending segment grows the fastest. This study analyzes the $13.7 billion US foodservice disposables industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2256 .... 10/2007.................... $4400

Stretch & Shrink Film

US stretch and shrink film demand will grow 4.7% annually through 2011, driven in part by retail trends favoring shrink-wrapped multipacks and pallet wrap. Stretch and shrink film will grow at a similar pace, with stretch film remaining the larger segment. The dominant resin, LDPE, offers the best growth opportunities. This study analyzes the $3.7 billion US stretch and shrink film industry, with forecasts for 2011 and 2016 by type, market and resin. It also evaluates market share and profiles major players.

#2254 .... 10/2007.................... $4400

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.

#2236 .... 08/2007.................... $4400

Cups & Lids

US cup and lid demand will grow 4.3% annually through 2010, driven by a favorable outlook for key foodservice markets (e.g., quick service restaurants, coffee shops). Lids will outpace cups based on an increasing percentage of drinking cups using lids, growing demand for higher-value specialty lids and continued gains for single-serving packaging cups. This study analyzes the $5.5 billion US cup and lid industry for 2010 and 2015 by product and market. It also details market share and profiles major players

#2154 .... 01/2007.................... $4300

Degradable Plastics

US degradable plastic demand will grow 16.8% annually through 2010 as these products become more price competitive and as they continue to benefit from various sustainable resource initiatives. Biodegradable/compostable plastic will remain dominant and grow the fastest, led by polyactic acid (PLA). Packaging will lead market gains. This study analyzes the $335 million US degradable plastic industry to 2010 and 2015 by type and market. It also evaluates market share and profiles major players.

#2107 .... 09/2006.................... $4400

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