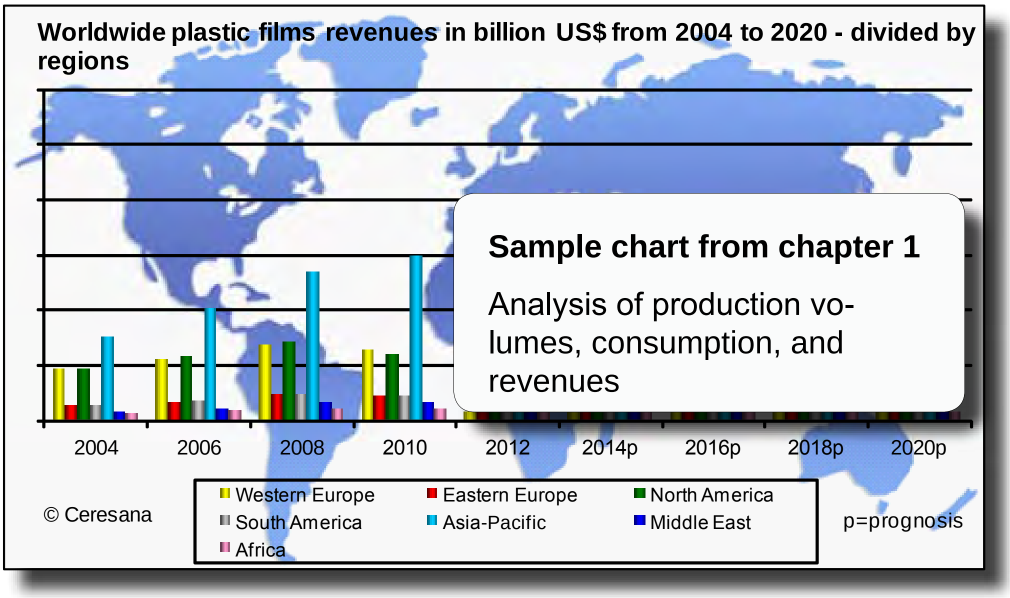
Market Study: Plastic Films - World

Ceresana
Market Intelligence. Consulting

Market Study: Plastic Films - World



Films are one of the most important sectors in the plastics industry. Due to their considerable importance for the most diverse industrial branches and the wide variety of possible applications, market analysts at Ceresana expect global demand for plastic films to increase to approx. 71 million tonnes until 2020.

Film Trends

There are distinct regional differences in demand development for plastic films. A notable discrepancy between saturated industrial markets and emerging countries with dynamic development in Asia-Pacific, South America, the Middle East or parts of Eastern Europe exists. An enormous growth potential is offered by the two most populous countries of the world, China and India, which account for about a third of the global plastic films market when taken together.
In the upcoming years, demand for plastic films will continue to increase. Among others, this is due to advantages plastic films offer when compared to flexible packaging made from other materials (such as paper or aluminum foil). This effect is felt in the foodstuffs sector in particular, but can also be observed in non-food applications. Additionally, a change in consumption habits (convenience trend, packaged instead of loose foodstuffs, shift towards flexible packaging) has positive effects on demand for films. We forecast the packaging sector to see demand increase at an AAGR of 3.7% until 2020. In the past, packaging made of several different materials and/or layers have increased in importance. The utilization of such films results in, e.g., an improved barrier effect of the film in question and an increased shelf-life of the packaged product.

Detailed Market Analysis for Several Types of Films

Divergent development can also be observed in regard to the material the films are made of. Films based on polyethylene (LDPE, LLDPE, HDPE) accounted for 73% and thus by far largest share of the plastic films market. However, BOPP (biaxially oriented polypropylene) and PET films have been gaining market shares due to their being used for high-quality packaging and are developing at high growth rates.

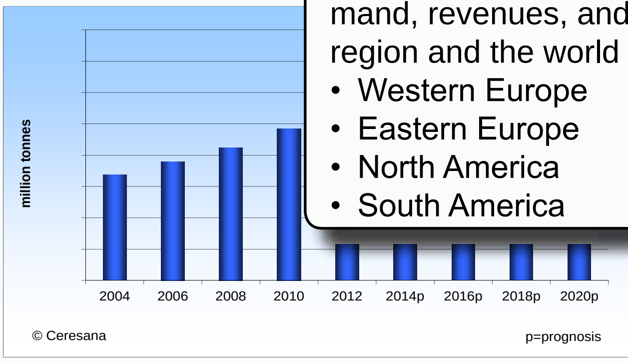
This worldwide most comprehensive report compiled by Ceresana contains market analyses of the most important types of films: films made of polyethylene (PE), polypropylene (PP), polyethylene terephthalate (PET), polyvinyl chloride (PVC), and other plastics (polystyrene, polyamide, polyester, polyvinyl butyral, etc.) For the first time, all market participants are able to get a complete overview over all relevant data and facts as well as background information concerning individual types of films and sales markets. Producers, processors, and traders thus receive a basis for their strategic and operative planning.

Table of Contents

1.6.3 Production – Asia-Pacific

In 2004, almost X million tonnes of plastic films were produced in Asia-Pacific (Graph). Until 2012, production volume rose at an average growth rate of X% p.a. to above X million tonnes. Almost X% of output originated in China. Until 2020, China is likely to increase its share of Asian-Pacific production volume (Table). The highest relative increase of the next eight years we forecast for India that is likely to see production volume to increase by X% p.a.

Chapter 1: Extensive market data on demand, revenues, and production for each region and the world from 2004 to 2020:
- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East
- Africa



Graph: Plastic films production in Asia-Pacific from 2004 to 2020

in million tonnes	2004	2006	2008	2010	2012	2014p	2016p	2018p	2020p	2012-2020
China	X	X	X	X	X	X	X	X	X	X% p.a.
India	X	X	X	X	X	X	X	X	X	X% p.a.
Japan	X	X	X	X	X	X	X	X	X	X% p.a.
South Korea	X	X	X	X	X	X	X	X	X	X% p.a.
Thailand	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Plastic films production in Asia-Pacific from 2004 to 2020 – split by major countries

2.4.2.1 Demand and Revenues – Brazil

About X million tonnes of plastic films were processed in Brazil in 2004. Until 2012, consumption levels had risen to about X million tonnes; compared to 2004, this corresponds to an average increase of X% per year.

In 2012, Brazilian real GDP grew by only 0.9%. However, GDP growth will increase again to average rates of more than 2.5% in the next few years. The strongest growth impulses will be generated by private consumption among the Brazilian population. Spending is likely to increase by more than 3% per year in the future. This is due to an increase of population (almost 1% p.a.) and rising per capita income. As an increase of wealth results in an increase of demand for packaged goods, demand for plastic films is likely to increase at above-average rates in a global comparison. A shift towards the use of flexible packaging will further support this development. Brazil is likely to continue to increase demand for plastic films by roughly X% p.a. to approx. X million tonnes in 2020.

in 1,000 tonnes	2004	2006	2008	2010	2012	2014p	2016p	2018p	2020p	2012-2020
Packaging Films	X	X	X							
Bags/Sacks	X	X	X							
Shrink / Stretch Films	X	X	X							
Agricultural Films	X	X	X							
Others	X	X	X							
Total	**X**	**X**	**X**							

Chapter 2: Country-specific analyses and forecasts for 18 countries:
- Demand and production split by product type
- Demand in individual application areas
- Import, export, and revenues

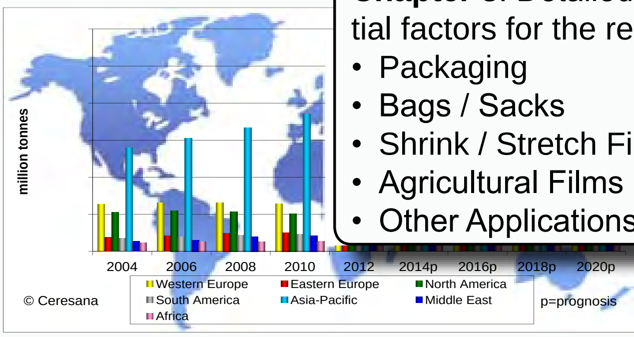
Table: Plastic films demand in Brazil from 2004 to 2020 – split by applications

The by far highest individual market volume of X tonnes in 2012 was recorded in the Brazilian Packaging segment. Second largest consumer is the sector Bags / Sacks, followed at a considerable distance by Shrink / Stretch Films and Agriculture (Table). The below-average growth rates forecast for the segments Bags and Sacks are partly due to the government trying to decrease consumption of disposable shopping bags made of plastic. So far, the government has been relying more on informing the public to achieve this goal than on nationwide regulations. Nonetheless, this policy is likely to yield some results.

3.1.2 Applications – Bags / Sacks

Worldwide, about X million tonnes of plastic films were processed into Bags and Sacks in 2012 (Graph). Bags and Sacks made of plastic films can be used in a wide variety of forms and applications. They may be used as shopping bags, trash can liners, mailing bags or as large bags for industrial and agricultural goods. One of their advantages is a comparatively low weight compared to their carrying capacity. In the past, carrying capacity in regard to puncture and tear resistance improved continuously.

Major consumer of plastic films was Asia-Pacific that processed X million tonnes in 2012, followed by Western Europe and North America. Demand on the part of Asia-Pacific is likely to amount to X million tonnes in 2020 and to account for about half of total global demand for plastic films in Bags and Sacks. In Western Europe, demand will increase by only X% per year. We forecast total global consumption volume of plastic films in Bags / Sacks to rise at average rates of X% p.a. to a volume of approx. X million tonnes in 2020.

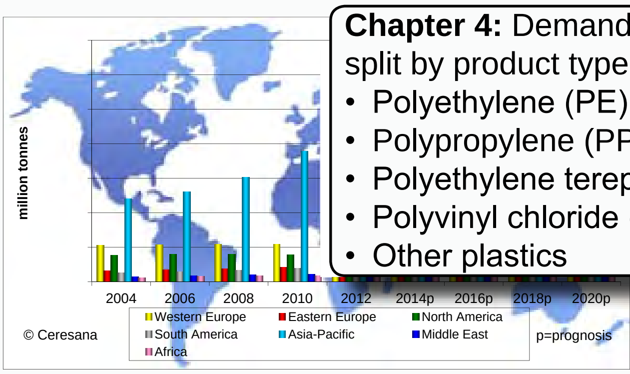


Graph: Worldwide demand for plastic films in Bags / Sacks from 2004 to 2020 – split by regions

Chapter 3: Detailed data and influential factors for the regional use in:
- Packaging
- Bags / Sacks
- Shrink / Stretch Films
- Agricultural Films
- Other Applications

4.2 Polypropylene Films – World

In 2012, about X million tonnes of polypropylene films were processed worldwide. In the past eight years, demand rose at an average rate of X% per year. Films made of polypropylene (PP) are the second most important type of plastic films. They are particularly suitable for high-quality packaging. Superior properties such as glossiness and transparency help to improve the visual appearance of a product. PP films can be split into the major groups BOPP (biaxially oriented PP) and CPP (cast PP), with the former accounting for the by far major share of total market volume. BOPP films are one of the major growth markets within the plastic films sector. Asia-Pacific is the worldwide largest producer of PP films, registering an output of X million tonnes in 2012 tonnes (Graph).



Graph: Worldwide PP film production from 2004 to 2020 – split by region

Chapter 4: Demand and production split by product type:
- Polyethylene (PE)
- Polypropylene (PP)
- Polyethylene terephthalate (PET)
- Polyvinyl chloride (PVC)
- Other plastics

5 Company Profiles

Kobusch Group				
Anton-Böhlen-Str. 5				
34414 Warburg				
Germany				
Tel.	49 5641 96 0		Web	www.kobus
Fax	49 5641 5786		E-mail	info@kobus
Financial Key Data				
(in million €)	2008	2009		
Turnover	172	150		
Profit	10	28		
Exchange Rates to US$				
US$ /1 €	0.71	0.70		
Divisions, Product Range	The company operates in the busines • Food • Non-Food • Medical • Commodities			
Production Sites	The company's production sites are lo • Livingston, United Kingdom • Stanley, United Kingdom • Caerphilly, United Kingdom • Rohrdorf, Germany • Halle, Germany • Warburg, Germany • Alexandria, Egypt			
Profile Summary	Kobusch was founded in 1958. The company employed about 1,500 people in 2011. R&D expenditures totaled €10 million in 2011. In 2011, total assets were about €150 million.			

Chapter 5: In-depth profiles of 85 manufacturers, including AEP Industries, Bemis, British Polythene Industries, Dupont Teijin Films, Formosa Plastics Group (FPG), Innovia Films, Kobusch, Okura Industrial, Reynolds Packaging Group, RKW, Saudi Basic Industries Corp. (SABIC), Sealed Air, Sinopec Shanghai Petrochemical (SPC), Toray Industries, Treofan Group, and Trioplast Industrier.

Note: The profiles are assigned to the country in which the company or holding is headquartered. Company profiles also include JVs and subsidiaries.

	33% of 2011 sales were generated by the division Food, 10% by Non-Food, 10% by Medical and 47% by Commodities. Divided by region, 76% were generated in Germany, 21% in the rest of Europe, 1% in the USA and 2% in other countries. On December 31, 2011, former mother company Pregis Corpation sold its packaging business to Sun Capital Partners. Pregis Rigid Packaging UK, Kobusch-Sengewald GmbH and Kobusch Packaging now operate as part of the business under the brand Kobusch. The company's quality management system is ISO 9001 certified.
	Kobusch manufactures printed and nonprinted films and laminates based on PP, PE, PA, and PET. The application ranges from consumer foods, consumer care and medical to specialized industries.

Chapter 5: Data and facts on major producers, clearly arranged by:
- Contact Details
- Turnover and Profit
- Product Range
- Production Sites
- Profile Summary

This study is especially useful for:

- Manufacturers and traders of plastics and films made of polyethylene, polypropylene, PET, PVC, etc.
- Producers of bags, sacks, packaging for foodstuffs as well as consumer and industrial goods, shrink and stretch films, agricultural films, construction films etc.
- Manufacturers of auxiliaries and additives: pigments, fillers, and plasticizers etc.
- Financial & Strategic Investors
- Associations and institutes
- Management, Production, Strategy planning, R&D, Marketing, Market research, Sales & Purchasing

Your Benefits

- Discover which markets offer the best opportunities for you by using our data on countries, applications, and products
- Gain insight into the outlook for your industry
- Recognize opportunities and risks in time – also on upstream and downstream markets
- Learn about key global and regional trends impacting supply and demand
- Strengthen your negotiating position
- Gain new business associates
- Benefit from the latest information on trends and market dynamics to evaluate the prospects of new projects, investments, and product innovations
- Get the most comprehensive insight to operate more successfully

About Ceresana

Ceresana is a leading international market research and consultancy company for the industrial sector that operates branch offices in Constance, Vienna and Hong Kong. For more than 10 years, we have been supplying several thousand customers from 55 countries with up-to-date market intelligence. Building on our extensive market knowledge, we create new prospects for your strategic and operational decisions. Our clients profit from implementation-oriented consulting services, tailor-made single-client studies and more than 40 multi-client market studies.
Gain the decisive competitive advantage and basis for your sustainable success!

We look forward to hearing from you!

Ceresana, 78462 Constance, Germany
Tel: +49 7531 94293 0, info@ceresana.com

Up-to-date Studies (More Infos: Click Titles)

Plastic Films - World
18 Countries, 85 Producers; 420 Pages; 08/2013

Expandable Polystyrene
14 Countries, 58 Producers; 330 Pages; 05/2013

Titanium Dioxide
17 Countries, 67 Producers; 310 Pages; 02/2013

Ammonia
25 Countries, 125 Producers; 530 Pages; 10/2012

Urea
16 Countries, 100 Producers; 630 Pages; 08/2012

Polyvinyl Chloride
51 Countries, 125 Producers; 780 Pages; 03/2012

Fertilizers - Europe
3 Products; 72 Producers; 550 Pages; 11/2011

Benzene
35 Countries, 153 Producers; 700 Pages; 07/2011

Adhesives - Europe
31 Countries, 199 Producers; 870 Pages; 03/2011

Plastic Caps - Europe
31 Countries, 379 Producers; 1,100 Pages; 09/2010

PUR & Isocyanates
13 Countries, 23 Producers; 296 Pages; 07/2013

Carbon Black
18 Countries, 52 Producers; 300 Pages; 04/2013

Fragrances
16 Countries, 152 Producers; 536 Pages; 01/2013

Paints & Varnishes-World
14 Countries, 96 Producers; 470 Pages; 09/2012

Adhesives - World
16 Countries, 100 Producers; 630 Pages; 07/2012

Surfactants
19 Countries; 127 Producers; 611 Pages; 02/2012

Fillers
21 Products; 339 Producers; 1,028 Pages; 09/2011

Plasticizers
19 Products; 213 Producers; 852 Pages; 05/2011

Plastic Pipes - Europe
30 Countries, 135 Producers; 590 Pages; 03/2011

Polyethylene - LDPE
67 Countries, 87 Producers; 850 Pages; 05/2010

Synthetic Rubber
18 Countries, 50 Producers; 440 Pages; 06/2013

Polyethylene - HDPE
27 Countries, 107 Producers; 540 Pages; 03/2013

Flavors
16 Countries, 152 Producers; 570 Pages; 12/2012

Biocides
16 Countries, 102 Producers; 540 Pages; 09/2012

Crop Protection
25 Countries, 150 Producers; 800 Pages; 06/2012

Bioplastics
7 Countries; 16 Products, 87 Producers; 555 P.; 12/2011

Pigments
503 Products; 303 Producers; 1,038 Pages; 07/2011

Stabilizers
11 Products; 159 Producers; 538 Pages; 05/2011

Propylene
51 Countries, 137 Producers; 760 Pages; 01/2011

Fertilizers - World
29 Countries, 165 Producers; 775 Pages; 05/2013

Printing Inks
16 Countries, 87 Producers; 330 Pages; 03/2013

Plastic Pipes - World
16 Countries, 76 Producers; 380 Pages; 11/2012

Polypropylene
30 Countries, 117 Producers; 710 Pages; 08/2012

Solvents
15 Countries, 335 Producers; 1,053 Pages; 05/2012

Chelating Agents
5 Products; 106 Producers; 355 Pages; 11/2011

Flame Retardants
25 Products; 256 Producers; 775 Pages; 07/2011

Paints & Varnishes-Eur.
30 Countries, 138 Producers; 575 Pages; 05/2011

Ethylene
55 Countries, 117 Producers; 801 Pages; 12/2010

Soon to come: Antioxidants, Biobased Chemicals, Bottles, Caps - World, Composites, Engineering Plastics, Lubricants, Polystyrene, Water Treatment Chemicals

Ceresana
Market Intelligence. Consulting.

Order today!

1) Choose Market Studies

Plastics
- [ ] Bioplastics (2nd ed.)
- [ ] Composites
- [ ] Engineering Plastics
- [ ] Expandable Polystyrene (2nd ed.)
- [ ] Polyethylene-HDPE (2nd ed.)
- [ ] Polyethylene-LDPE
- [ ] Polyethylene-LLDPE
- [ ] Polypropylene (2nd ed.)
- [ ] Polystyrene
- [ ] Polyurethanes & Isocyanates
- [ ] Polyvinyl Chloride (2nd ed.)
- [ ] Synthetic Rubber

Additives
- [ ] Antioxidants
- [ ] Biocides
- [ ] Fillers (2nd ed.)
- [ ] Flame Retardants (2nd ed.)
- [ ] Pigments (2nd ed.)
- [ ] Plasticizers (2nd ed.)
- [ ] Stabilizers

Chemicals
- [ ] Benzene
- [ ] Biobased Chemicals
- [ ] Carbon Black
- [ ] Chelating Agents (2nd ed.)
- [ ] Ethylene
- [ ] Flavors
- [ ] Fragrances
- [ ] Propylene
- [ ] Solvents (2nd ed.)
- [ ] Surfactants
- [ ] Titanium Dioxide
- [ ] Water Treatment Chemicals

Industry
- [ ] Adhesives - Europe
- [ ] Adhesives - World
- [ ] Lubricants - Europe
- [ ] Paints & Varnishes - Europe
- [ ] Paints & Varnishes - World
- [ ] Plastic Bottles - Europe
- [ ] Plastic Caps & Closures - Europe
- [ ] Plastic Caps & Closures - World
- [ ] Plastic Films - World
- [ ] Plastic Pipes - Europe
- [ ] Plastic Pipes - World
- [ ] Printing Inks - World

Agriculture
- [ ] Ammonia
- [ ] Crop Protection
- [ ] Fertilizers - Europe
- [ ] Fertilizers - World
- [ ] Urea

2) Language
- [ ] German
- [ ] English

- [ ] Please send us **free reading samples** first

3) Edition (Content is identical)

	PDF-file / book	License for	Prices
[ ] **Basic**	book	1 site	€2,100
[ ] **Premium**	PDF-file + book	1 site	€3,100
[ ] **Corporate**	PDF-file	all sites	€3,900
____ Additional printout(s)	book	licensed site	€300

When ordering
2 studies: 10% discount
3 studies: 20% discount

Promotion Code: _______

Upon receiving your order we will send the invoice immediately. PDF-files can be sent by email.
Prices include shipping. (Customers from Germany: plus 19% VAT). Our GTC apply.

If paying by **credit card**, please fill out the following: [ ] MasterCard [ ] VISA

Card Number: ______________________ Expiry date: _____ _____

4) Contact Details

Title/ Name ______________________

Company ______________________

Department ______________________

Address ______________________

E-mail ______________________

Tel./ Fax ______________________

5) Order from us

Tel +49 7531 94293 - 0 **Fax** - 27 **E-mail** order@ceresana.com **Web** www.ceresana.com/en

Address Ceresana, Technologiezentrum, 78462 Konstanz, Germany

Click here!