MASTIO & COMPANY — MARKET INTELLIGENCE

Polyethylene Film:

Markets, Substitution, Value-In-Use, and Technologies

U.S. AND CANADA · 2025–2028 · 13TH EDITION

The most comprehensive, company-level intelligence available on the North American polyethylene film industry — 33 end-use markets, named processors and resin suppliers, and a three-year forecast built from direct primary interviews.

THE MARKET AT A GLANCE

Mastio & Company's Polyethylene Film Market Study is built on direct interviews with the processors who run the resin—not modeled estimates. The 13th Edition quantifies 2025 consumption and the 2025–2028 forecast across 33 end-use markets, by resin type, by company, and by market sector.

Four Market Sectors, One Complete Picture

Sector	Coverage	What's Included
Industrial Film and Packaging	*Chapters 12–17*	Stretch, shrink, and heavy-duty film used in industrial handling, unitizing, and shipping
Nonpackaging	*Chapters 25–33*	Construction, agricultural, medical, and other non-packaging film applications
Retail Film and Packaging	*Chapters 18–24*	Trash bags, merchandise bags, household film, and other retail-facing products
Food Packaging	*Chapters 2–11*	Film and bags for baked goods, meat, produce, frozen, snack, and other food categories

Why Own This Intelligence

- **Company-level granularity.** See named processors and their individual resin volumes, growth rates, and resin mix — not just market averages.
- **A forward-looking view.** Three-year forecasts by market and by resin, so you can prioritize where demand is actually growing.
- **Pricing context.** Value-in-use exhibits break out average selling price per pound, by product, so you can benchmark instantly.
- **Built from the source.** Findings come from direct interviews with the film processors and converters who consume the resin — not desk research.

The Scale of the Research

Every finding in the study is traceable back to a named company. The 13th Edition draws on interviews with 100+ named processors across North America — from the largest multi-plant converters to focused regional players — each one profiled by name, with individual volumes and growth rates, in every applicable chapter.

This overview highlights the scope and structure of the study. Company names, individual volumes, growth rates, and pricing detail are reserved for licensed subscribers.

WHAT'S INSIDE EVERY CHAPTER

Every one of the 32 market chapters (Chapters 2–33) follows the same rigorous structure, so intelligence is comparable market to market. Chapter 1 rolls the entire study up into an executive summary, and a full processor appendix closes out the report.

Market Analysis — Market size, product specifications, materials competition, named participants with growth projections, and capacity utilization by processor.

Factors Affecting the Market — The economy, government regulations, environmental issues, mergers & acquisitions, and new design or technology trends shaping demand.

Film Extrusion Technology — Equipment types in use, utilization rates, and planned new-equipment purchases — where converters are investing next.

Resin Technology — The specific resin grades and blends used in each application, and how formulations are evolving.

Value-in-Use — Average selling price per pound, broken into resin, conversion, and margin components — a direct pricing benchmark for every product.

Forecast of Resin Use and Consumption — A 2025–2028 volume forecast by resin type, so you can size the opportunity ahead.

Plus: Chapter 1 (Executive Summary) totals resin consumption by type and by market across all 33 markets, with value-in-use comparisons ranked highest to lowest selling price. The Appendix lists North American film producers with volumes by market.

The Resin Universe Tracked in Every Chapter

Each chapter's Resin Technology and Forecast sections break 2025 and 2028 consumption out by specific resin grade — not just broad resin family — so you can see exactly which formulations are gaining or losing share:

LLDPE: hexene, butene, octene, super hexene, metallocene (mLLDPE) **LDPE:** homopolymer, EVA, EAA (ionomer), EMA **HDPE:** HMW, MMW, UHMW **Plus:** MDPE, PCR, VLDPE, bioplastics, PLA, PIR/PIR-LLDPE, and other specialty and barrier resins — 30+ grades in all.

CHAPTER DIRECTORY — PART 1 OF 2

The 33 end-use markets below are grouped into the study's four major sectors. Each market receives its own full chapter following the structure on the previous page.

CHAPTER DIRECTORY — PART 2 OF 2

NONPACKAGING (Chapters 25–33)		
Ch.	**Market**	**What This Chapter Covers**
25	**Institutional Trash Bags**	Can liners for institutional, industrial, and food-service use
26	**Construction Film**	Vapor barriers, house wrap, and construction sheeting
27	**Geomembrane Lining Systems**	Geomembrane liners for containment and environmental applications
28	**Juvenile and Adult Hygiene Film**	Backsheet and component film for diapers and hygiene products
29	**Medical Film and Packaging**	Medical-device and sterile packaging film
30	**Agricultural Film**	Silage, mulch, and greenhouse film
31	**Drop Cloths, Tarps and Covers**	Protective covers, tarps, and drop cloths
32	**E-Commerce Film, Envelopes and Mailers**	Poly mailers and e-commerce shipping film
33	**Miscellaneous**	Additional and emerging PE film applications

THE INTELLIGENCE YOU'LL OWN

Subscribers don't just receive a printed report — every chapter is paired with source-level Excel data, so you can filter, sort, and build directly on the study's findings.

- **Processor Database (PivotTable-ready).** Every resin used by every processor, by market — built for Excel PivotTable analysis by company, resin, or geography.
- **Resin Breakdown by Company.** 2025 and 2028 volumes, by resin grade, for each named processor in every one of the 33 markets.
- **Growth Comparisons, by Chapter.** Company-level growth vs. market growth for every chapter, with respondent explanations for growth or decline.
- **Value-in-Use Detail.** Per-pound selling price broken into resin, conversion, and margin — the benchmark behind every chapter's pricing exhibits.
- **Factors Affecting the Market.** Challenges, growth opportunities, environmental issues, and key market trends, sourced directly from processor interviews.
- **Equipment & Capacity File.** Film lines, throughput, planned equipment purchases, and capacity utilization by processor.

The Shape of the Data

A generic mock-up of the Growth Comparisons layout used in every chapter. Actual company names, volumes, and growth rates are reserved for licensed subscribers.

Company	'25 MM lbs.	'28 MM lbs.	Co. AAGR
Processor A	*XX.X*	*XX.X*	*X.X%*
Processor B	*XX.X*	*XX.X*	*X.X%*
Processor C	*XX.X*	*XX.X*	*X.X%*
Processor D	*XX.X*	*XX.X*	*X.X%*

Illustrative layout only. Subscribers see this table fully populated — by name, by company — for every one of the 33 markets.

WHO RELIES ON THIS STUDY

Mastio's PE Film Market Study is used across the value chain — anywhere a decision depends on knowing where PE film demand is headed, and who is buying.

Resin Producers & Suppliers

Prioritize sales coverage by identifying which processors and markets offer the fastest volume growth, and which resin grades are gaining share.

Film Converters & Processors

Benchmark your growth and capacity utilization against named competitors, and validate pricing with value-in-use data.

Brand Owners & CPG Buyers

Understand the packaging film supply base serving your category, and where materials innovation is heading.

Equipment & Machinery OEMs

Target capital-equipment sales using capacity utilization data and documented new-equipment purchase plans.

Investors & M&A Advisors

Size markets, assess growth trajectories, and evaluate acquisition targets with independent, company-level data.

Consultants & Analysts

Ground client deliverables in primary research spanning the full breadth of the North American PE film industry.

Whichever seat you sit in, the underlying data is the same — verified, company-level intelligence drawn directly from the processors and converters who consume PE film, so every team is working from one trusted source.

WHY MASTIO & COMPANY

Mastio & Company has built its reputation on primary market research — going directly to the companies that make, convert, and sell the product, rather than modeling from the outside in.

- **Now in its 13th Edition.** Continuously refined coverage of the North American PE film industry, tracking how markets and technologies evolve edition over edition.
- **Primary, respondent-based research.** Findings are drawn from direct interviews with film processors representing meaningful shares of volume in every market covered — including their own growth explanations, not just modeled averages.
- **Named, verifiable data.** Company-level detail throughout — processor names, individual volumes, and resin mixes — so findings can be checked and trusted.
- **Full value-chain view.** From resin selection and film extrusion technology to pricing and end-market demand, every chapter connects the dots from resin producer to end use.

Study Snapshot

Coverage	33 end-use markets, 4 market sectors, U.S. and Canada
Forecast horizon	2025–2028 (3-year AAGR by market and by resin)
Resin types tracked	LLDPE, LDPE, HDPE, MDPE, PCR, and 15+ additional specialty resins
Data depth	Company-level volumes, growth rates, and resin mix in every chapter

Research Scale

Named processors interviewed	100+ companies, profiled by name across the study
Resin grades tracked	30+ distinct LLDPE, LDPE, HDPE, and specialty resin grades
End-use markets	33 chapters across four major market sectors

GET YOUR COPY

The Polyethylene Film Market Study, 13th Edition, is available now for U.S. and Canada coverage, 2025–2028.

Available Formats

- Full printed report — all 33 chapters plus the executive summary and appendix
- Digital PDF edition for your team
- Complete Excel data suite — processor database, resin breakdown, growth comparisons, and value-in-use detail for every chapter

Next Steps

Own the Complete Picture of the North American PE Film Market

Contact Mastio & Company today to purchase the 13th Edition, request a sample chapter, or ask about multi-user and site access.

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Mastio & Company has delivered independent, primary-research market intelligence to the plastics and packaging industry for decades. This overview highlights the scope of the 13th Edition study; full chapter content, exhibits, and data files are available to licensed subscribers.