

Industrial Films Market Report by Type (Linear Low-Density Polyethylene (LLDPE) and Low-Density Polyethylene (LDPE), High-Density Polyethylene (HDPE), Polyethylene Terephthalate (PET), Polypropylene (PP), Polyvinyl Chloride (PVC), Polyamide, and Others), End Use Industry (Agriculture, Industrial Packaging, Building and Construction, Healthcare, Transportation, and Others), and Region 2024-2032

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Abstracts

The global industrial films market size reached US\$ 43.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 68.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5% during 2024-2032. Rising demand for efficient packaging materials, advancement in manufacturing technologies, growing emphasis on sustainability, the expansion of end-use industries, rapid industrialization, innovations in film chip materials, and stringent product safety regulations are some of the factors propelling the market growth.

Industrial films are a specialized category of plastics known for their exceptional chemical resistance and adaptability to demanding environments. They are crafted through the extrusion process using polymer materials, such as polyethylene, polypropylene, polyethylene terephthalate, and polyamide. They are widely used bolstering crop quality and productivity through the prevention of soil erosion, elevation of soil temperature, provision of nutrients, and shielding against UV radiation, rain, and wind. Moreover, they exhibit several characteristics, such as waterproofing, optical clarity, and robust durability. Consequently, they have found extensive applications

across diverse industries, spanning automotive, transportation, construction, agriculture, medical, electrical, and electronics sectors. In these domains, industrial films are prized for their ability to provide protection, structural support, and specialized properties tailored to the unique demands of each sector.

The global industrial films market experiences substantial growth primarily due to the surging product demand within the agriculture sector and the escalating awareness regarding the cost-effectiveness of industrial films compared to traditional farming methods. Furthermore, the introduction of technologies, such as near-infrared radiation (NIR)-blocking films, ultraviolet (UV)-blocking films, and fluorescent films, contribute to the market growth. Besides this, the decreasing availability of arable land across the globe, coupled with rapid urbanization, which promotes high-yield farming practices, is further propelling the market growth. Moreover, the burgeoning global population and rapid integration into the production of protective cover films for electronic devices are creating a positive environment for the market. Other factors, such as the rising disposable income levels, extensive research and development (R&D) activities by key players, increased investments in flexible and transparent bi-axial film development, and a substantial uptick in smart device sales, are fueling the market growth.

Industrial Films Market Trends/Drivers:

Escalating product demand in agriculture industry

The surge in demand for industrial films within the agriculture sector is primarily driven by their cost-efficiency compared to conventional farming techniques. Industrial films offer a cost-effective solution for enhancing crop yields and protecting crops from adverse weather conditions. These films act as a barrier, reducing water evaporation and controlling temperature, creating an optimal microenvironment for plant growth. This technology is particularly advantageous for greenhouse farming, where precise climate control is crucial. Moreover, industrial films aid in weed suppression and prevent soil erosion, further enhancing agricultural productivity. Farmers across the globe are increasingly adopting these films to optimize their yields, making them a vital component in modern agriculture practices.

Continual product innovations in industrial films

The industrial films market benefits from a continuous stream of product innovations, including the development of near-infrared radiation (NIR)-blocking films, ultraviolet (UV)-blocking films, and fluorescent films. NIR-blocking films, for instance, help regulate temperature and light transmission in greenhouses, improving crop growth conditions.

UV-blocking films protect plants from harmful ultraviolet rays, reducing the risk of sunburn and other damage. Fluorescent films enhance photosynthesis by diffusing light more evenly across plants. These innovations drive higher adoption rates as farmers seek advanced solutions to enhance crop quality and yield. The industrial film industry's commitment to innovation ensures that it remains at the forefront of modern agricultural practices.

Decreasing arable land and rapid urbanization

The diminishing availability of arable land globally, coupled with the rapid pace of urbanization, is a significant driver for the industrial films market. As urban areas expand, arable land diminishes, necessitating the adoption of high-yield farming practices. They provide a protective shield for crops, allowing cultivation in non-traditional areas such as rooftops and vertical farms. Furthermore, industrial films help in conserving water resources, making them indispensable in regions facing water scarcity. As urban populations grow, the demand for locally sourced produce rises, making urban agriculture a viable solution. Industrial films facilitate this transition, making them a crucial component in addressing the challenges of decreasing arable land and urbanization.

Industrial Films Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on type and end use industry.

Breakup by Type:

- Linear Low-Density Polyethylene (LLDPE) and Low-Density Polyethylene (LDPE)
- High-Density Polyethylene (HDPE)
- Polyethylene Terephthalate (PET)
- Polypropylene (PP)
- Polyvinyl Chloride (PVC)
- Polyamide
- Others

Linear low-density polyethylene (LLDPE) and low-density polyethylene (LDPE) dominates the market

The report has provided a detailed breakup and analysis of the market based on the

type. This includes linear low-density polyethylene (LLDPE) and low-density polyethylene (LDPE), high-density polyethylene (HDPE), polyethylene terephthalate (PET), polypropylene (PP), polyvinyl chloride (PVC), polyamide, and others. According to the report, linear low-density polyethylene (LLDPE) and low-density polyethylene (LDPE) represented the largest segment.

The low-density polyethylene (LLDPE) and low-density polyethylene (LDPE) are widely used owing to the surging awareness regarding their exceptional flexibility and ability to conform to various shapes. LLDPE and LDPE films excel in providing protective barriers for a wide range of products, from food items to industrial equipment, ensuring product integrity during storage and transportation. Moreover, their moisture-resistant properties are highly valuable, particularly in agriculture, where these films are extensively used for greenhouse covers and mulching. In line with this, these films offer cost-effective solutions due to their ease of production and versatility. This cost-efficiency appeals to industries seeking economical yet reliable packaging and protective solutions. Furthermore, the increasing focus on sustainability and recyclability is driving the adoption of LLDPE and LDPE films, as they are often recyclable, aligning with environmental regulations and consumer preferences.

Breakup by End Use Industry:

- Agriculture
- Industrial Packaging
- Building and Construction
- Healthcare
- Transportation
- Others

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes agriculture, industrial packaging, building and construction, healthcare, transportation, and others.

The agriculture segment is driven by the imperative to protect crops and increase yields. Industrial films, especially greenhouse and mulching films, create controlled environments that shield crops from adverse conditions and pests while promoting water conservation for sustainable farming. In contrast, the industrial packaging segment relies on the versatility and cost-effectiveness of industrial films. They act as robust protective barriers for various products, ensuring their integrity during storage and transport. Within the building and construction sector, industrial films serve as

moisture barriers, insulation, and protective coatings, supporting energy-efficient and sustainable construction practices. In healthcare, industrial films are essential for sterile and hygienic packaging, ensuring the integrity of medical devices and pharmaceuticals while adhering to stringent quality and safety standards. The transportation industry benefits from industrial films in protective coatings, graphics, and window films, enhancing aesthetics, reducing glare, and improving security. The others segment encompassing electronics and consumer goods, ongoing product innovation, rising disposable incomes, and evolving consumer preferences drive industrial film adoption, fostering growth in this diverse category.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest industrial films market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest segment.

The Asia Pacific region is experiencing robust growth in the industrial films market, driven by the burgeoning manufacturing sector in countries, such as China, India, and Southeast Asian nations, which has fueled the demand for industrial films used in various applications, including packaging, automotive, and electronics. These films are vital in protecting goods during transit, ensuring product integrity, and enhancing manufacturing efficiency. Moreover, the increasing awareness of environmental sustainability propels the adoption of eco-friendly and recyclable industrial films across the Asia Pacific. As environmental concerns rise, manufacturers and consumers alike prioritize sustainable packaging solutions, boosting the demand for eco-friendly films. In line with this, infrastructural development projects, particularly in construction and agriculture, are on the upswing in the region. Industrial films find extensive utility in these sectors for applications, such as construction membranes and agricultural films. Furthermore, the region's rapidly growing middle-class population and rising disposable income levels are augmenting the market growth.

Competitive Landscape:

The competitive landscape within the industrial films market is characterized by intense rivalry among key players striving for market share and technological advancement. Companies in this sector engage in a range of strategies to maintain their competitive edge. Innovation remains a cornerstone of competition, with firms constantly researching and developing new industrial film formulations and applications. These innovations encompass advancements in film materials, such as eco-friendly and high-performance options, as well as specialized films tailored to specific industries like agriculture, packaging, and electronics. Market players also focus on expanding their global footprint through strategic partnerships, collaborations, mergers and acquisitions. By establishing a presence in diverse geographic regions, companies can tap into emerging markets and widen their customer base.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Berry Global Inc.
Bogucki Folie
Compagnie de Saint-Gobain S.A.
Cosmo Films Limited
Dupont Teijin Films US
Inteplast Group Corporation
Jindal Poly Films
Mitsui Chemicals Tohcello Inc. (Mitsui Chemicals Inc.)
Polyplex Corporation Limited
SKC Co. Ltd.
Toray Industries Inc.
Toyobo Co. Ltd.
Unitika Ltd.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In April 2023, Berry Global Group Inc. initiated a significant expansion of its key stretch film manufacturing facility in Lewisburg, Tennessee. This expansion, encompassing 25,000 square feet, is strategically aimed at accommodating the surging demand for Berry's top-quality sustainable stretch films.

In November 2021, DuPont acquired Rogers Corporation to expand its position in advanced materials for high-growth secular end-markets.

Key Questions Answered in This Report

1. What was the size of the global industrial films market in 2023?
2. What is the expected growth rate of the global industrial films market during 2024-2032?
3. What are the key factors driving the global industrial films market?
4. What has been the impact of COVID-19 on the global industrial films market?
5. What is the breakup of the global industrial films market based on the type?
6. What are the key regions in the global industrial films market?
7. Who are the key players/companies in the global industrial films market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL INDUSTRIAL FILMS MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY TYPE

- 6.1 Linear Low-Density Polyethylene (LLDPE) and Low-Density Polyethylene (LDPE)
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 High-Density Polyethylene (HDPE)
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Polyethylene Terephthalate (PET)

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Polypropylene (PP)
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Polyvinyl Chloride (PVC)
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 Polyamide
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast
- 6.7 Others
 - 6.7.1 Market Trends
 - 6.7.2 Market Forecast

7 MARKET BREAKUP BY END USE INDUSTRY

- 7.1 Agriculture
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Industrial Packaging
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Building and Construction
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Healthcare
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Transportation
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast
- 7.6 Others
 - 7.6.1 Market Trends
 - 7.6.2 Market Forecast

8 MARKET BREAKUP BY REGION

- 8.1 North America

- 8.1.1 United States
 - 8.1.1.1 Market Trends
 - 8.1.1.2 Market Forecast
- 8.1.2 Canada
 - 8.1.2.1 Market Trends
 - 8.1.2.2 Market Forecast
- 8.2 Asia-Pacific
 - 8.2.1 China
 - 8.2.1.1 Market Trends
 - 8.2.1.2 Market Forecast
 - 8.2.2 Japan
 - 8.2.2.1 Market Trends
 - 8.2.2.2 Market Forecast
 - 8.2.3 India
 - 8.2.3.1 Market Trends
 - 8.2.3.2 Market Forecast
 - 8.2.4 South Korea
 - 8.2.4.1 Market Trends
 - 8.2.4.2 Market Forecast
 - 8.2.5 Australia
 - 8.2.5.1 Market Trends
 - 8.2.5.2 Market Forecast
 - 8.2.6 Indonesia
 - 8.2.6.1 Market Trends
 - 8.2.6.2 Market Forecast
 - 8.2.7 Others
 - 8.2.7.1 Market Trends
 - 8.2.7.2 Market Forecast
- 8.3 Europe
 - 8.3.1 Germany
 - 8.3.1.1 Market Trends
 - 8.3.1.2 Market Forecast
 - 8.3.2 France
 - 8.3.2.1 Market Trends
 - 8.3.2.2 Market Forecast
 - 8.3.3 United Kingdom
 - 8.3.3.1 Market Trends
 - 8.3.3.2 Market Forecast
 - 8.3.4 Italy

- 8.3.4.1 Market Trends
- 8.3.4.2 Market Forecast
- 8.3.5 Spain
 - 8.3.5.1 Market Trends
 - 8.3.5.2 Market Forecast
- 8.3.6 Russia
 - 8.3.6.1 Market Trends
 - 8.3.6.2 Market Forecast
- 8.3.7 Others
 - 8.3.7.1 Market Trends
 - 8.3.7.2 Market Forecast
- 8.4 Latin America
 - 8.4.1 Brazil
 - 8.4.1.1 Market Trends
 - 8.4.1.2 Market Forecast
 - 8.4.2 Mexico
 - 8.4.2.1 Market Trends
 - 8.4.2.2 Market Forecast
 - 8.4.3 Others
 - 8.4.3.1 Market Trends
 - 8.4.3.2 Market Forecast
- 8.5 Middle East and Africa
 - 8.5.1 Market Trends
 - 8.5.2 Market Breakup by Country
 - 8.5.3 Market Forecast

9 SWOT ANALYSIS

- 9.1 Overview
- 9.2 Strengths
- 9.3 Weaknesses
- 9.4 Opportunities
- 9.5 Threats

10 VALUE CHAIN ANALYSIS

11 PORTERS FIVE FORCES ANALYSIS

- 11.1 Overview

- 11.2 Bargaining Power of Buyers
- 11.3 Bargaining Power of Suppliers
- 11.4 Degree of Competition
- 11.5 Threat of New Entrants
- 11.6 Threat of Substitutes

12 PRICE ANALYSIS

13 COMPETITIVE LANDSCAPE

- 13.1 Market Structure
- 13.2 Key Players
- 13.3 Profiles of Key Players
 - 13.3.1 Berry Global Inc.
 - 13.3.1.1 Company Overview
 - 13.3.1.2 Product Portfolio
 - 13.3.1.3 Financials
 - 13.3.1.4 SWOT Analysis
 - 13.3.2 Bogucki Folie
 - 13.3.2.1 Company Overview
 - 13.3.2.2 Product Portfolio
 - 13.3.3 Compagnie de Saint-Gobain S.A.
 - 13.3.3.1 Company Overview
 - 13.3.3.2 Product Portfolio
 - 13.3.3.3 Financials
 - 13.3.3.4 SWOT Analysis
 - 13.3.4 Cosmo Films Limited
 - 13.3.4.1 Company Overview
 - 13.3.4.2 Product Portfolio
 - 13.3.4.3 Financials
 - 13.3.5 Dupont Teijin Films US
 - 13.3.5.1 Company Overview
 - 13.3.5.2 Product Portfolio
 - 13.3.6 Inteplast Group Corporation
 - 13.3.6.1 Company Overview
 - 13.3.6.2 Product Portfolio
 - 13.3.7 Jindal Poly Films
 - 13.3.7.1 Company Overview
 - 13.3.7.2 Product Portfolio

- 13.3.7.3 Financials
- 13.3.8 Mitsui Chemicals Tohcello Inc. (Mitsui Chemicals Inc.)
 - 13.3.8.1 Company Overview
 - 13.3.8.2 Product Portfolio
- 13.3.9 Polyplex Corporation Limited
 - 13.3.9.1 Company Overview
 - 13.3.9.2 Product Portfolio
 - 13.3.9.3 Financials
- 13.3.10 SKC Co. Ltd.
 - 13.3.10.1 Company Overview
 - 13.3.10.2 Product Portfolio
 - 13.3.10.3 Financials
 - 13.3.10.4 SWOT Analysis
- 13.3.11 Toray Industries Inc.
 - 13.3.11.1 Company Overview
 - 13.3.11.2 Product Portfolio
 - 13.3.11.3 Financials
 - 13.3.11.4 SWOT Analysis
- 13.3.12 Toyobo Co. Ltd.
 - 13.3.12.1 Company Overview
 - 13.3.12.2 Product Portfolio
 - 13.3.12.3 Financials
 - 13.3.12.4 SWOT Analysis
- 13.3.13 Unitika Ltd.
 - 13.3.13.1 Company Overview
 - 13.3.13.2 Product Portfolio
 - 13.3.13.3 Financials
 - 13.3.13.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Industrial Films Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Industrial Films Market Forecast: Breakup by Type (in Million US\$), 2024-2032

Table 3: Global: Industrial Films Market Forecast: Breakup by End Use Industry (in Million US\$), 2024-2032

Table 4: Global: Industrial Films Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 5: Global: Industrial Films Market: Competitive Structure

Table 6: Global: Industrial Films Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Industrial Films Market: Major Drivers and Challenges

Figure 2: Global: Industrial Films Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Industrial Films Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Industrial Films Market: Breakup by Type (in %), 2023

Figure 5: Global: Industrial Films Market: Breakup by End Use Industry (in %), 2023

Figure 6: Global: Industrial Films Market: Breakup by Region (in %), 2023

Figure 7: Global: Industrial Films (Linear Low-Density Polyethylene (LLDPE) and Low-Density Polyethylene (LDPE)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 8: Global: Industrial Films (Linear Low-Density Polyethylene (LLDPE) and Low-Density Polyethylene (LDPE)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 9: Global: Industrial Films (High-Density Polyethylene (HDPE)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 10: Global: Industrial Films (High-Density Polyethylene (HDPE)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 11: Global: Industrial Films (Polyethylene Terephthalate (PET)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 12: Global: Industrial Films (Polyethylene Terephthalate (PET)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 13: Global: Industrial Films (Polypropylene (PP)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 14: Global: Industrial Films (Polypropylene (PP)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 15: Global: Industrial Films (Polyvinyl Chloride (PVC)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 16: Global: Industrial Films (Polyvinyl Chloride (PVC)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 17: Global: Industrial Films (Polyamide) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 18: Global: Industrial Films (Polyamide) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 19: Global: Industrial Films (Other Types) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 20: Global: Industrial Films (Other Types) Market Forecast: Sales Value (in

Million US\$), 2024-2032

Figure 21: Global: Industrial Films (Agriculture) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 22: Global: Industrial Films (Agriculture) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 23: Global: Industrial Films (Industrial Packaging) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 24: Global: Industrial Films (Industrial Packaging) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 25: Global: Industrial Films (Building and Construction) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 26: Global: Industrial Films (Building and Construction) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 27: Global: Industrial Films (Healthcare) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 28: Global: Industrial Films (Healthcare) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: Global: Industrial Films (Transportation) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 30: Global: Industrial Films (Transportation) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 31: Global: Industrial Films (Other End Use Industries) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 32: Global: Industrial Films (Other End Use Industries) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 33: North America: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 34: North America: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 35: United States: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 36: United States: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 37: Canada: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 38: Canada: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 39: Asia-Pacific: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 40: Asia-Pacific: Industrial Films Market Forecast: Sales Value (in Million US\$),

2024-2032

Figure 41: China: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 42: China: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 43: Japan: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 44: Japan: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 45: India: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 46: India: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 47: South Korea: Industrial Films Market: Sales Value (in Million US\$), 2018 &
2023

Figure 48: South Korea: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 49: Australia: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 50: Australia: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 51: Indonesia: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 52: Indonesia: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 53: Others: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 54: Others: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 55: Europe: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 56: Europe: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 57: Germany: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 58: Germany: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 59: France: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 60: France: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 61: United Kingdom: Industrial Films Market: Sales Value (in Million US\$), 2018
& 2023

Figure 62: United Kingdom: Industrial Films Market Forecast: Sales Value (in Million
US\$), 2024-2032

Figure 63: Italy: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 64: Italy: Industrial Films Market Forecast: Sales Value (in Million US\$),
2024-2032

Figure 65: Spain: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 66: Spain: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 67: Russia: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 68: Russia: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 69: Others: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 70: Others: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 71: Latin America: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 72: Latin America: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 73: Brazil: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 74: Brazil: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 75: Mexico: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 76: Mexico: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 77: Others: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 78: Others: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 79: Middle East and Africa: Industrial Films Market: Sales Value (in Million US\$), 2018 & 2023

Figure 80: Middle East and Africa: Industrial Films Market: Breakup by Country (in %), 2023

Figure 81: Middle East and Africa: Industrial Films Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: Global: Industrial Films Industry: SWOT Analysis

Figure 83: Global: Industrial Films Industry: Value Chain Analysis

Figure 84: Global: Industrial Films Industry: Porter's Five Forces Analysis

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