

United States Additive Masterbatch Market Assessment, By Functionality [UV Stabilizer, Antioxidant, Antimicrobial, Flame-Retardant, Anti-slip, Anti-corrosive, Hybrid, Others], By Resin Type [Polypropylene, Polyethylene, Polystyrene, PET, PVC, PVA, Others], By Application [Moulding, Lamination, Insulation, Manufacturing, Others], By End-use Industry [Packaging, Agriculture, Building & Construction, Electrical & Electronics, Transportation, Consumer Goods, Toys/Recreational Products, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

United States additive masterbatch market size was valued at USD 672 million in 2022, which is expected to grow to USD 1095.6 million in 2030, with a CAGR of 6.3% during the forecast period between 2023 and 2030. Escalating regulatory standards, particularly concerning environmental adherence and safety protocols are pivotal catalysts of additive masterbatch in the United States as it compels manufacturers to pioneer inventive additives that align with these rigorous mandates. Concurrently, industries such as automotive, electronics, packaging, and healthcare are witnessing a sharp demand for top-tier plastics customized for specific attributes by adding additive masterbatch due to their cost- effectiveness. Additive masterbatch provides engineer solutions that augment mechanical robustness, thermal resilience, aesthetics, and other essential properties that drive demand in several sectors.

Furthermore, the expanding packaging sector is propelled by the surge in e-commerce, sustainability considerations, and the necessity for specialized additives capable of elevating barrier protection and recyclability. Finally, as technological advancements unfold and consumer preferences gravitate toward sustainable and adaptable products, the additive masterbatch market is poised for expansion further driven by continuous research, technological breakthroughs, and strategic adaptations to the diverse needs of various industries in the United States.

Growing demand for Electronics and Electrical Mobility

As electronics become increasingly intricate and compact, the need for plastics possessing precise electrical attributes and flame resistance becomes paramount. This requirement aligns with the expanding electronics sector and the emergence of electric mobility, which drives the demand for plastics offering improved electrical properties, thermal resilience, and flame resistance. These requirements are efficiently and economically met by adding additive masterbatch to recycled plastics, driving the demand for additive masterbatch in the United States market.

For instance, Electric vehicle manufacturers such as Nissan, BMW, and Toyota are starting to use recycled plastics to reduce overall weight and energy consumption. Calcium carbonate masterbatch is commonly added to the recycled plastics used in EVs to overcome the disadvantages of recycled plastic. Therefore, the increasing sales of EVs in the United States, with an increase in sales by 50% in Q1 2023 compared to Q1 2022 is driving the demand for additive masterbatch in the United States.

Strong focus on sustainability

Manufacturers are projected to orient their efforts towards developing additives specifically designed to assist plastics in adapting to the continuously evolving landscape of environmental and safety requirements. With the escalation of environmental concerns and the increasing stringency of regulatory pressures, there is an anticipated growth in the demand for additive masterbatch solutions in the United States.

For instance, Mobility aid masterbatches contribute to enhanced performance in PET bottle production by ensuring uniform distribution throughout the material. They maintain the integrity of subsequent adhesion-dependent processes such as labelling and printing. Moreover, these additives eliminate the necessity for costly and time-

consuming spray coatings, which tend to leave a problematic waxy residue on bottles and packaging machinery, requiring frequent cleaning. This addition of masterbatch in this process has improved the efficiency sixfold making it very efficient and sustainable leading to growing demand for additive masterbatch in the United States.

Impact of COVID-19

The additive masterbatch market in the United States experienced challenges during the COVID-19 pandemic due to supply chain disruptions, factory closures, and reduced demand from downstream sectors such as automotive, aerospace, and non-essential consumer goods. Lockdowns initially hindered production and material availability, tightening the market's supply chain. However, the crisis underscored the significance of plastics in healthcare, packaging, and hygiene products, leading to a demand shift towards medical devices and essential goods packaging. The surge in remote work and e-commerce drove the demand for electronics and packaging materials leading to increased demand for additive masterbatch in the United States.

Impact of Russia-Ukraine War

The ongoing conflict has led to significant disruptions in global supply chains, impacting the availability of raw materials and transportation routes. Consequently, the price of additive masterbatch in the United States has increased due to disrupted supply-demand dynamics. Capacity reductions in the pigment and dye industry, coupled with elevated costs of feedstock materials namely CaCo₃ powder, titanium dioxide, polymers, carbon black, pigments, dyes, and additives have contributed to increase in price, which in turn decreased consumer sentiments. Political uncertainty has prompted a decline in demand from various industries in the United States, with development investments being postponed or cancelled. Furthermore, the imposition of sanctions and shipping disruptions arising from the import ban of Russian commodities by the United States has worsened the supply situation of additive masterbatch in the country.

Key Players Landscape and Outlook

Major additive masterbatch manufacturers in the US are driven by increasing regulations and a growing demand for high-quality products to innovate and introduce new inventions and product launches continuously. As regulatory pressures intensify and consumer expectations for premium goods rise, these manufacturers are motivated to develop novel solutions that align with stringent standards while meeting the evolving needs of various industries.

For instance, in May 2023, Tosaf introduced a masterbatch carrier system, meeting the comprehensive food contact standards. These standards encompass guidelines from prominent bodies such as the German Federal Institute for Risk Assessment and the intricate regulatory frameworks of the USA and China, including FDA and China Food Safety Law regulations.

The outlook for additive masterbatch in the United States is optimistic, driven by increasing regulatory requirements and a demand for customized high-performance plastics. Packaging, electronics, healthcare, and automotive industries will propel innovation, leading to specialized additives that meet stringent standards. As sustainability and consumer preferences for quality products rise, manufacturers are expected to focus on developing novel solutions, enhancing material properties, and contributing to the growth of diverse sectors.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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