

Rigid Plastics Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

Rigid Plastics Industry Strategic Market Summary

Introduction

The global rigid plastics sector operates as a critical barometer for broader macroeconomic health, structurally embedded across industrial, infrastructural, and consumer value chains. Driven by divergent regional energy policies, accelerated energy transitions, and complex petrochemical capacity rationalizations, the market is undergoing a period of profound strategic realignment. Corporate capital expenditure is shifting from traditional volume-driven growth toward high-value, highly specified polymer architectures and circular economy infrastructures.

Current internal financial modeling and global capital expenditure baselines indicate that the rigid plastics market will achieve a valuation range of \$290 billion to \$300 billion by 2026. Looking forward, the sector is forecast to expand at a compound annual growth rate (CAGR) ranging from 4.5% to 5.5% through 2031. This trajectory is fundamentally underpinned by robust downstream demand in emerging economies, the intensive lightweighting requirements of electric vehicle (EV) manufacturing, and the uncompromising structural requirements of modern consumer packaging. However, this growth is not uniformly distributed. Profitability pools are shifting rapidly as geopolitical trade realignments and structural energy deficits in traditional Western manufacturing hubs force corporate conglomerates to rethink their long-term asset positioning.

Regional Market Dynamics

Asia-Pacific (APAC)

The APAC region remains the indisputable center of gravity for both polymer synthesis and downstream conversion. China dictates the global supply-demand balance through unprecedented investments in upstream petrochemical integration. Chinese production capacity for polyethylene (PE) is projected to account for approximately 25% of the staggering 160 million tons of global capacity expected by 2025. Similarly, within the polyvinyl chloride (PVC) matrix, global annual production hovers between 40 million and 50 million tons, with China alone contributing over 20 million tons. This renders China the undisputed heavyweight in both production and localized consumption, although structural headwinds in the Chinese domestic real estate sector have periodically suppressed localized PVC demand, forcing excess volumes onto the export market. Industrial powerhouses in Taiwan, China—such as Formosa Plastics Corporation and CHIMEI Corporation—continue to leverage highly integrated chemical parks and specialized technical expertise to maintain critical market share across engineering plastics and styrenics, servicing complex electronics and automotive hubs across the broader Asian theater.

North America

North American petrochemical dynamics remain inextricably linked to the structural advantages of natural gas liquids (NGLs) derived from shale basins. Ethane cracking provides a steep cost advantage over naphtha-based processes, positioning the United States as a highly competitive export hub for rigid polyethylene and polyvinyl chloride resins. Growth in this region is estimated to track lower than the global average, reflecting a mature market environment. Capital deployment here is largely pivoting toward advanced recycling facilities and lower-carbon-footprint polymers to appease increasingly stringent institutional investor mandates regarding ESG criteria.

Europe

European operators are navigating a fiercely hostile operating environment. Stripped of historically cheap pipeline gas and facing some of the world's most aggressive carbon taxation mechanisms (such as the Carbon Border Adjustment Mechanism), the European rigid plastics market is experiencing severe margin compression. Market growth ranges are severely muted. Industrial strategy across the European Union has shifted from capacity expansion to asset rationalization, with major players shutting down sub-scale or highly energy-intensive crackers. Demand growth is entirely sustained by regulatory-driven shifts toward recycled rigid packaging and high-performance polymers for regional automotive OEMs transitioning to electrified fleets.

Middle East & Africa (MEA)

The MEA region is executing a strategic downstream pivot. Historically content with exporting raw crude and basic chemical building blocks, national oil companies are increasingly pursuing crude-to-chemicals (COTC) megaprojects. This aggressive forward integration aims to capture the higher margins associated with polymer resins like PP and PE. The region benefits from unparalleled feedstock cost advantages and is strategically positioning itself to supply the rapidly urbanizing African continent and the demand-heavy Indian subcontinent, projecting robust regional CAGR figures well above the global baseline.

South America

South America represents a highly fragmented, import-reliant market with isolated pockets of robust growth, primarily driven by the agricultural sector's demand for rigid piping and bulk industrial packaging. Brazil leads regional capacity, heavily focused on bio-based polymer initiatives—such as bio-PE sourced from sugarcane ethanol—catering to global FMCG brands desperate for drop-in sustainable rigid plastic alternatives.

Application and Type Segmentation

Polymer Type Trajectories

The rigid plastics matrix is highly diversified, with disparate supply-demand fundamentals across distinct chemical families:

Polypropylene (PP): Operating as the second most widely utilized plastic resin globally, the PP market sustains an annual volume footprint of approximately 80 million tons. Its exceptional strength-to-weight ratio and chemical resistance make it the polymer of choice for rigid applications demanding thermal stability, ranging from automotive battery casings to reusable food containers.

Polyethylene (PE): High-Density Polyethylene (HDPE) dictates the rigid PE landscape. As global PE capacity breaches 160 million tons by 2025, HDPE benefits from intense demand in infrastructural piping and rigid industrial intermediate bulk containers (IBCs), favored for its superior impact resistance and barrier properties.

Polyvinyl Chloride (PVC): With 40 to 50 million tons produced annually, rigid unplasticized PVC (uPVC) is inextricably linked to global construction cycles. Its dominance in water distribution networks, window profiles, and electrical conduits remains unchallenged due to its flame retardancy and multi-decade durability.

Engineering Resins (PC, PMMA, and ABS): Polycarbonate (PC) and Poly(methyl methacrylate) (PMMA) are experiencing rapid demand acceleration decoupled from traditional GDP growth. PMMA's unmatched optical clarity and weatherability are vital for modern automotive design, specifically in rear-light clusters and integrated sensor fascias. PC dominates high-impact transparent applications, including protective housings and EV battery module components. Acrylonitrile Butadiene Styrene (ABS) continues to see heavy utilization in consumer electronics and appliance housings, balancing rigidity with superior surface finish capabilities.

Application Vectors

Automotive & Transportation: Internal combustion engine obsolescence has catalyzed a materials revolution. EVs require intense lightweighting to offset heavy lithium-ion battery arrays. Rigid polymers like PP compounds and PC are rapidly replacing legacy metal components in structural brackets, cooling manifolds, and aerodynamic exterior paneling.

Construction: The dual forces of rapid urbanization in the Global South and infrastructure revitalization in the West command vast volumes of PVC and HDPE. Water management systems, specifically, represent a recession-resistant end-market due to chronic underinvestment in global municipal water grids.

Food & Packaging: Rigid packaging faces intense regulatory scrutiny regarding end-of-life circularity. Consequently, FMCG giants are moving aggressively away from multi-layer, multi-material laminates toward rigid mono-material architectures (primarily pure PET or pure PP) to facilitate seamless mechanical recycling.

Industrial & Consumer Electronics: The proliferation of smart home devices, IoT hardware, and telecommunications infrastructure demands rigid plastics that

offer high dielectric strength, thermal management, and dimensional stability under continuous operational stress.

Value Chain & Supply Chain Analysis

The rigid plastics value chain is a highly complex, capital-intensive ecosystem characterized by tight upstream integration and highly fragmented downstream conversion.

Upstream Feedstock Vulnerabilities

Polymer synthesis remains overwhelmingly tethered to hydrocarbon cracking. Whether utilizing naphtha or natural gas liquids, the bedrock of the rigid plastics industry is highly sensitive to geopolitical choke points. Global supply chains rely heavily on unimpeded maritime logistics. Critical trade routes dictate the flow of essential petrochemical feedstocks. For instance, approximately 20 million barrels of oil transit through the Strait of Hormuz daily—accounting for a staggering 20% of global petroleum liquid consumption and representing nearly \$600 billion in annual transaction value. Furthermore, roughly one-fifth of global liquefied natural gas (LNG) traverses this exact maritime corridor. Any geopolitical friction in such constrained theaters immediately cascades into the petrochemical value chain, violently distorting monomer pricing and subsequently compressing margins for non-integrated polymer producers globally.

Midstream Polymerization and Compounding

Midstream operations are dominated by the catalytic polymerization of monomers (ethylene, propylene, styrene) into virgin resins. This stage is fiercely competitive and requires immense economies of scale. To differentiate, midstream players heavily invest in compounding—infusing raw resins with impact modifiers, UV stabilizers, and glass fibers to create specialized rigid architectures that command premium pricing over commoditized base grades.

Downstream Conversion and Circular Logistics

Downstream converters utilize injection molding, blow molding, and thermoforming to shape these resins into final rigid products. The most disruptive shift in the contemporary value chain is the forced integration of reverse logistics. Extended Producer Responsibility (EPR) mandates are compelling the value chain to close the

loop, requiring massive investments in sorting technologies, mechanical recycling, and nascent chemical recycling (pyrolysis) plants to supply post-consumer recycled (PCR) rigid resins back to the midstream.

Competitive Landscape

The global competitive arena for rigid plastics is highly consolidated at the top, populated by vertically integrated petrochemical supermajors, state-backed national champions, and specialized engineering material providers. Corporate strategy diverges sharply based on geographic base and feedstock access.

Integrated Petrochemical Titans

Companies such as Exxon Mobil Corporation, The Dow Chemical Company, Shell-partnered entities, and Chevron Phillips Chemical Company LLC dominate the global cost curve by leveraging upstream refinery integration and advantaged North American natural gas. Their strategic posture is currently defensive regarding mature markets but highly aggressive in deploying capital toward advanced chemical recycling and high-performance polyethylene/polypropylene development.

Asian Heavyweights and State-Backed Enterprises

Entities including China Petroleum & Chemical Corporation (Sinopec), PetroChina Company Limited, Reliance Industries Limited, and SK geo centric Co. Ltd. operate with a mandate to capture domestic growth and reduce import reliance. The scale of capacity additions by Sinopec and PetroChina heavily influences global spot pricing. Reliance Industries utilizes deep vertical integration in India to dominate localized polymer supply. Meanwhile, Lotte Chemical Corporation and LG Chem Ltd. are aggressively pivoting toward high-value battery materials and specialty rigid polymers to escape the low-margin commoditized resin trap.

European Stalwarts

BASF SE, LyondellBasell Industries N.V., TotalEnergies SE, Borealis AG, Covestro AG, INEOS Group Holdings S.A., and Trinseo PLC face an existential pivot. Burdened by structural energy costs, these entities are accelerating the transition away from base chemical volumes toward specialty applications. Covestro remains a premier force in polycarbonates, while Borealis and LyondellBasell are aggressively pioneering circular PP and PE solutions to maintain their premium positioning among European packaging

and automotive OEMs.

Specialty and Regional Powerhouses

Shin-Etsu Chemical Co. Ltd. retains supreme pricing power and market dominance in the global PVC landscape, maintaining incredibly disciplined operational metrics. Westlake Corporation operates as a formidable integrated PVC and chlor-alkali player, leveraging North American energy advantages. In the Asian theater, Formosa Plastics Corporation (headquartered in Taiwan, China) and CHIMEI Corporation (also based in Taiwan, China) execute highly sophisticated production strategies. CHIMEI commands unmatched global leadership in the ABS market, while Formosa operates vast, highly integrated complexes spanning PVC, PE, and PP, capturing immense value across the electronics and automotive supply chains throughout the Pacific Rim. SABIC operates with unparalleled feedstock leverage from Saudi Arabia, partnering globally to push heavy volumes of PE, PP, and engineering plastics into high-growth markets.

Opportunities & Challenges

Market Tailwinds

The imperative for vehicular electrification acts as a massive secular tailwind for specialized rigid plastics. Metal replacement is no longer an optional cost-saving measure but a structural necessity to extend EV battery range. Consequently, engineered rigid polymers that offer thermal management, electrical insulation, and extreme lightweighting will see exponential demand growth.

Simultaneously, the global push toward supply chain regionalization—often termed 'nearshoring' or 'friendshoring'—presents lucrative opportunities for capacity development in secondary markets like Mexico, India, and Southeast Asia. As OEMs attempt to insulate themselves from trans-Pacific friction, local polymer demand in these alternative manufacturing hubs is surging. Furthermore, the rigid packaging sector's transition to mono-material designs offers chemical producers an opportunity to lock in long-term contracts with FMCG brands willing to pay a 'green premium' for highly recyclable rigid PP or PET grades.

Market Headwinds

Conversely, the industry faces severe structural headwinds. Overcapacity is the most immediate threat to mid-term profitability. The sheer volume of new PE and PP capacity

brought online in Asia—specifically China—has far outpaced domestic consumption growth, leading to a flooded export market and deeply depressed cracker margins globally. Western producers without feedstock advantages will struggle to justify operating legacy assets in this environment.

Additionally, legislative hostility toward plastics remains a potent threat. While single-use flexible plastics bear the brunt of regulatory bans, durable rigid plastics are increasingly subjected to complex carbon accounting and end-of-life taxation. The implementation of carbon border tariffs structurally penalizes polymer imports from jurisdictions with high carbon-intensity grids, forcing a rapid, capital-intensive decarbonization of the polymerization process. Companies failing to secure long-term renewable power purchase agreements or those unable to integrate meaningful volumes of post-consumer recycled content into their rigid portfolios will face severe market access restrictions and aggressive margin erosion in premium consumer markets.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Rigid Plastics Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Rigid Plastics by Region
- 8.2 Import of Rigid Plastics by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST RIGID PLASTICS MARKET IN NORTH AMERICA (2021-2031)

- 9.1 Rigid Plastics Market Size
- 9.2 Rigid Plastics Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST RIGID PLASTICS MARKET IN SOUTH AMERICA (2021-2031)

- 10.1 Rigid Plastics Market Size
- 10.2 Rigid Plastics Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST RIGID PLASTICS MARKET IN ASIA & PACIFIC (2021-2031)

- 11.1 Rigid Plastics Market Size
- 11.2 Rigid Plastics Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia & New Zealand

CHAPTER 12 HISTORICAL AND FORECAST RIGID PLASTICS MARKET IN EUROPE (2021-2031)

- 12.1 Rigid Plastics Market Size
- 12.2 Rigid Plastics Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 North Europe

CHAPTER 13 HISTORICAL AND FORECAST RIGID PLASTICS MARKET IN MEA (2021-2031)

- 13.1 Rigid Plastics Market Size
- 13.2 Rigid Plastics Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL RIGID PLASTICS MARKET (2021-2026)

- 14.1 Rigid Plastics Market Size
- 14.2 Rigid Plastics Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL RIGID PLASTICS MARKET FORECAST (2026-2031)

- 15.1 Rigid Plastics Market Size Forecast
- 15.2 Rigid Plastics Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 INEOS Group Holdings S.A.
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Rigid Plastics Information
 - 16.1.3 SWOT Analysis of INEOS Group Holdings S.A.
 - 16.1.4 INEOS Group Holdings S.A. Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.2 The Dow Chemical Company
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Rigid Plastics Information
 - 16.2.3 SWOT Analysis of The Dow Chemical Company
 - 16.2.4 The Dow Chemical Company Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.3 Exxon Mobil Corporation
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Rigid Plastics Information
 - 16.3.3 SWOT Analysis of Exxon Mobil Corporation
 - 16.3.4 Exxon Mobil Corporation Rigid Plastics Sales, Revenue, Price and Gross

Margin (2021-2026)

16.4 Shin-Etsu Chemical Co. Ltd.

16.4.1 Company Profile

16.4.2 Main Business and Rigid Plastics Information

16.4.3 SWOT Analysis of Shin-Etsu Chemical Co. Ltd.

16.4.4 Shin-Etsu Chemical Co. Ltd. Rigid Plastics Sales, Revenue, Price and Gross

Margin (2021-2026)

16.5 LyondellBasell Industries N.V.

16.5.1 Company Profile

16.5.2 Main Business and Rigid Plastics Information

16.5.3 SWOT Analysis of LyondellBasell Industries N.V.

16.5.4 LyondellBasell Industries N.V. Rigid Plastics Sales, Revenue, Price and Gross

Margin (2021-2026)

16.6 Formosa Plastics Corporation

16.6.1 Company Profile

16.6.2 Main Business and Rigid Plastics Information

16.6.3 SWOT Analysis of Formosa Plastics Corporation

16.6.4 Formosa Plastics Corporation Rigid Plastics Sales, Revenue, Price and Gross

Margin (2021-2026)

16.7 Borealis AG

16.7.1 Company Profile

16.7.2 Main Business and Rigid Plastics Information

16.7.3 SWOT Analysis of Borealis AG

16.7.4 Borealis AG Rigid Plastics Sales, Revenue, Price and Gross Margin

(2021-2026)

16.8 Braskem S.A.

16.8.1 Company Profile

16.8.2 Main Business and Rigid Plastics Information

16.8.3 SWOT Analysis of Braskem S.A.

16.8.4 Braskem S.A. Rigid Plastics Sales, Revenue, Price and Gross Margin

(2021-2026)

16.9 CHIMEI Corporation

16.9.1 Company Profile

16.9.2 Main Business and Rigid Plastics Information

16.9.3 SWOT Analysis of CHIMEI Corporation

16.9.4 CHIMEI Corporation Rigid Plastics Sales, Revenue, Price and Gross Margin

(2021-2026)

16.10 Trinseo PLC

16.10.1 Company Profile

- 16.10.2 Main Business and Rigid Plastics Information
- 16.10.3 SWOT Analysis of Trinseo PLC
- 16.10.4 Trinseo PLC Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.11 TotalEnergies SE
 - 16.11.1 Company Profile
 - 16.11.2 Main Business and Rigid Plastics Information
 - 16.11.3 SWOT Analysis of TotalEnergies SE
 - 16.11.4 TotalEnergies SE Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.12 Westlake Corporation
 - 16.12.1 Company Profile
 - 16.12.2 Main Business and Rigid Plastics Information
 - 16.12.3 SWOT Analysis of Westlake Corporation
 - 16.12.4 Westlake Corporation Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.13 LG Chem Ltd.
 - 16.13.1 Company Profile
 - 16.13.2 Main Business and Rigid Plastics Information
 - 16.13.3 SWOT Analysis of LG Chem Ltd.
 - 16.13.4 LG Chem Ltd. Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.14 SK geo centric Co. Ltd.
 - 16.14.1 Company Profile
 - 16.14.2 Main Business and Rigid Plastics Information
 - 16.14.3 SWOT Analysis of SK geo centric Co. Ltd.
 - 16.14.4 SK geo centric Co. Ltd. Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.15 PetroChina Company Limited
 - 16.15.1 Company Profile
 - 16.15.2 Main Business and Rigid Plastics Information
 - 16.15.3 SWOT Analysis of PetroChina Company Limited
 - 16.15.4 PetroChina Company Limited Rigid Plastics Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.16 China Petroleum & Chemical Corporation
 - 16.16.1 Company Profile
 - 16.16.2 Main Business and Rigid Plastics Information
 - 16.16.3 SWOT Analysis of China Petroleum & Chemical Corporation
 - 16.16.4 China Petroleum & Chemical Corporation Rigid Plastics Sales, Revenue, Price

and Gross Margin (2021-2026)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List
Table Research Scope of Rigid Plastics Report
Table Data Sources of Rigid Plastics Report
Table Major Assumptions of Rigid Plastics Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Rigid Plastics Picture
Table Rigid Plastics Classification
Table Rigid Plastics Applications List
Table Drivers of Rigid Plastics Market
Table Restraints of Rigid Plastics Market
Table Opportunities of Rigid Plastics Market
Table Threats of Rigid Plastics Market
Table Raw Materials Suppliers List
Table Different Production Methods of Rigid Plastics
Table Cost Structure Analysis of Rigid Plastics
Table Key End Users List
Table Latest News of Rigid Plastics Market
Table Merger and Acquisition List
Table Planned/Future Project of Rigid Plastics Market
Table Policy of Rigid Plastics Market
Table 2021-2031 Regional Export of Rigid Plastics
Table 2021-2031 Regional Import of Rigid Plastics
Table 2021-2031 Regional Trade Balance
Figure 2021-2031 Regional Trade Balance
Table 2021-2031 North America Rigid Plastics Market Size and Market Volume List
Figure 2021-2031 North America Rigid Plastics Market Size and CAGR
Figure 2021-2031 North America Rigid Plastics Market Volume and CAGR
Table 2021-2031 North America Rigid Plastics Demand List by Application
Table 2021-2026 North America Rigid Plastics Key Players Sales List
Table 2021-2026 North America Rigid Plastics Key Players Market Share List
Table 2021-2031 North America Rigid Plastics Demand List by Type
Table 2021-2026 North America Rigid Plastics Price List by Type
Table 2021-2031 United States Rigid Plastics Market Size and Market Volume List
Table 2021-2031 United States Rigid Plastics Import & Export List

Table 2021-2031 Canada Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Canada Rigid Plastics Import & Export List
Table 2021-2031 Mexico Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Mexico Rigid Plastics Import & Export List
Table 2021-2031 South America Rigid Plastics Market Size and Market Volume List
Figure 2021-2031 South America Rigid Plastics Market Size and CAGR
Figure 2021-2031 South America Rigid Plastics Market Volume and CAGR
Table 2021-2031 South America Rigid Plastics Demand List by Application
Table 2021-2026 South America Rigid Plastics Key Players Sales List
Table 2021-2026 South America Rigid Plastics Key Players Market Share List
Table 2021-2031 South America Rigid Plastics Demand List by Type
Table 2021-2026 South America Rigid Plastics Price List by Type
Table 2021-2031 Brazil Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Brazil Rigid Plastics Import & Export List
Table 2021-2031 Argentina Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Argentina Rigid Plastics Import & Export List
Table 2021-2031 Chile Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Chile Rigid Plastics Import & Export List
Table 2021-2031 Peru Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Peru Rigid Plastics Import & Export List
Table 2021-2031 Asia & Pacific Rigid Plastics Market Size and Market Volume List
Figure 2021-2031 Asia & Pacific Rigid Plastics Market Size and CAGR
Figure 2021-2031 Asia & Pacific Rigid Plastics Market Volume and CAGR
Table 2021-2031 Asia & Pacific Rigid Plastics Demand List by Application
Table 2021-2026 Asia & Pacific Rigid Plastics Key Players Sales List
Table 2021-2026 Asia & Pacific Rigid Plastics Key Players Market Share List
Table 2021-2031 Asia & Pacific Rigid Plastics Demand List by Type
Table 2021-2026 Asia & Pacific Rigid Plastics Price List by Type
Table 2021-2031 China Rigid Plastics Market Size and Market Volume List
Table 2021-2031 China Rigid Plastics Import & Export List
Table 2021-2031 India Rigid Plastics Market Size and Market Volume List
Table 2021-2031 India Rigid Plastics Import & Export List
Table 2021-2031 Japan Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Japan Rigid Plastics Import & Export List
Table 2021-2031 South Korea Rigid Plastics Market Size and Market Volume List
Table 2021-2031 South Korea Rigid Plastics Import & Export List
Table 2021-2031 Southeast Asia Rigid Plastics Market Size List
Table 2021-2031 Southeast Asia Rigid Plastics Market Volume List
Table 2021-2031 Southeast Asia Rigid Plastics Import List

Table 2021-2031 Southeast Asia Rigid Plastics Export List
Table 2021-2031 Australia & New Zealand Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Australia & New Zealand Rigid Plastics Import & Export List
Table 2021-2031 Europe Rigid Plastics Market Size and Market Volume List
Figure 2021-2031 Europe Rigid Plastics Market Size and CAGR
Figure 2021-2031 Europe Rigid Plastics Market Volume and CAGR
Table 2021-2031 Europe Rigid Plastics Demand List by Application
Table 2021-2026 Europe Rigid Plastics Key Players Sales List
Table 2021-2026 Europe Rigid Plastics Key Players Market Share List
Table 2021-2031 Europe Rigid Plastics Demand List by Type
Table 2021-2026 Europe Rigid Plastics Price List by Type
Table 2021-2031 Germany Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Germany Rigid Plastics Import & Export List
Table 2021-2031 France Rigid Plastics Market Size and Market Volume List
Table 2021-2031 France Rigid Plastics Import & Export List
Table 2021-2031 United Kingdom Rigid Plastics Market Size and Market Volume List
Table 2021-2031 United Kingdom Rigid Plastics Import & Export List
Table 2021-2031 Italy Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Italy Rigid Plastics Import & Export List
Table 2021-2031 Spain Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Spain Rigid Plastics Import & Export List
Table 2021-2031 Belgium Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Belgium Rigid Plastics Import & Export List
Table 2021-2031 Netherlands Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Netherlands Rigid Plastics Import & Export List
Table 2021-2031 Austria Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Austria Rigid Plastics Import & Export List
Table 2021-2031 Poland Rigid Plastics Market Size and Market Volume List
Table 2021-2031 Poland Rigid Plastics Import & Export List
Table 2021-2031 North Europe Rigid Plastics Market Size and Market Volume List
Table 2021-2031 North Europe Rigid Plastics Import & Export List
Table 2021-2031 MEA Rigid Plastics Market Size and Market Volume List
Figure 2021-2031 MEA Rigid Plastics Market Size and CAGR
Figure 2021-2031 MEA Rigid Plastics Market Volume and CAGR
Table 2021-2031 MEA Rigid Plastics Demand List by Application
Table 2021-2026 MEA Rigid Plastics Key Players Sales List
Table 2021-2026 MEA Rigid Plastics Key Players Market Share List
Table 2021-2031 MEA Rigid Plastics Demand List by Type

- Table 2021-2026 MEA Rigid Plastics Price List by Type
- Table 2021-2031 Egypt Rigid Plastics Market Size and Market Volume List
- Table 2021-2031 Egypt Rigid Plastics Import & Export List
- Table 2021-2031 Israel Rigid Plastics Market Size and Market Volume List
- Table 2021-2031 Israel Rigid Plastics Import & Export List
- Table 2021-2031 South Africa Rigid Plastics Market Size and Market Volume List
- Table 2021-2031 South Africa Rigid Plastics Import & Export List
- Table 2021-2031 Gulf Cooperation Council Countries Rigid Plastics Market Size and Market Volume List
- Table 2021-2031 Gulf Cooperation Council Countries Rigid Plastics Import & Export List
- Table 2021-2031 Turkey Rigid Plastics Market Size and Market Volume List
- Table 2021-2031 Turkey Rigid Plastics Import & Export List
- Table 2021-2026 Global Rigid Plastics Market Size List by Region
- Table 2021-2026 Global Rigid Plastics Market Size Share List by Region
- Table 2021-2026 Global Rigid Plastics Market Volume List by Region
- Table 2021-2026 Global Rigid Plastics Market Volume Share List by Region
- Table 2021-2026 Global Rigid Plastics Demand List by Application
- Table 2021-2026 Global Rigid Plastics Demand Market Share List by Application
- Table 2021-2026 Global Rigid Plastics Capacity List
- Table 2021-2026 Global Rigid Plastics Key Vendors Capacity Share List
- Table 2021-2026 Global Rigid Plastics Key Vendors Production List
- Table 2021-2026 Global Rigid Plastics Key Vendors Production Share List
- Figure 2021-2026 Global Rigid Plastics Capacity Production and Growth Rate
- Table 2021-2026 Global Rigid Plastics Key Vendors Production Value List
- Figure 2021-2026 Global Rigid Plastics Production Value and Growth Rate
- Table 2021-2026 Global Rigid Plastics Key Vendors Production Value Share List
- Table 2021-2026 Global Rigid Plastics Demand List by Type
- Table 2021-2026 Global Rigid Plastics Demand Market Share List by Type
- Table 2021-2026 Regional Rigid Plastics Price List
- Table 2026-2031 Global Rigid Plastics Market Size List by Region
- Table 2026-2031 Global Rigid Plastics Market Size Share List by Region
- Table 2026-2031 Global Rigid Plastics Market Volume List by Region
- Table 2026-2031 Global Rigid Plastics Market Volume Share List by Region
- Table 2026-2031 Global Rigid Plastics Demand List by Application
- Table 2026-2031 Global Rigid Plastics Demand Market Share List by Application
- Table 2026-2031 Global Rigid Plastics Capacity List
- Table 2026-2031 Global Rigid Plastics Key Vendors Capacity Share List
- Table 2026-2031 Global Rigid Plastics Key Vendors Production List
- Table 2026-2031 Global Rigid Plastics Key Vendors Production Share List

Figure 2026-2031 Global Rigid Plastics Capacity Production and Growth Rate
Table 2026-2031 Global Rigid Plastics Key Vendors Production Value List
Figure 2026-2031 Global Rigid Plastics Production Value and Growth Rate
Table 2026-2031 Global Rigid Plastics Key Vendors Production Value Share List
Table 2026-2031 Global Rigid Plastics Demand List by Type
Table 2026-2031 Global Rigid Plastics Demand Market Share List by Type
Table 2026-2031 Rigid Plastics Regional Price List
Table INEOS Group Holdings S.A. Information
Table SWOT Analysis of INEOS Group Holdings S.A.
Table 2021-2026 INEOS Group Holdings S.A. Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 INEOS Group Holdings S.A. Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 INEOS Group Holdings S.A. Rigid Plastics Market Share
Table The Dow Chemical Company Information
Table SWOT Analysis of The Dow Chemical Company
Table 2021-2026 The Dow Chemical Company Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 The Dow Chemical Company Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 The Dow Chemical Company Rigid Plastics Market Share
Table Exxon Mobil Corporation Information
Table SWOT Analysis of Exxon Mobil Corporation
Table 2021-2026 Exxon Mobil Corporation Rigid Plastics Product Capacity Production
Price Cost Production Value
Figure 2021-2026 Exxon Mobil Corporation Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 Exxon Mobil Corporation Rigid Plastics Market Share
Table Shin-Etsu Chemical Co. Ltd. Information
Table SWOT Analysis of Shin-Etsu Chemical Co. Ltd.
Table 2021-2026 Shin-Etsu Chemical Co. Ltd. Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Shin-Etsu Chemical Co. Ltd. Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 Shin-Etsu Chemical Co. Ltd. Rigid Plastics Market Share
Table LyondellBasell Industries N.V. Information
Table SWOT Analysis of LyondellBasell Industries N.V.
Table 2021-2026 LyondellBasell Industries N.V. Rigid Plastics Product Capacity
Production Price Cost Production Value

Figure 2021-2026 LyondellBasell Industries N.V. Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 LyondellBasell Industries N.V. Rigid Plastics Market Share

Table Formosa Plastics Corporation Information

Table SWOT Analysis of Formosa Plastics Corporation

Table 2021-2026 Formosa Plastics Corporation Rigid Plastics Product Capacity

Production Price Cost Production Value

Figure 2021-2026 Formosa Plastics Corporation Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Formosa Plastics Corporation Rigid Plastics Market Share

Table Borealis AG Information

Table SWOT Analysis of Borealis AG

Table 2021-2026 Borealis AG Rigid Plastics Product Capacity Production Price Cost

Production Value

Figure 2021-2026 Borealis AG Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Borealis AG Rigid Plastics Market Share

Table Braskem S.A. Information

Table SWOT Analysis of Braskem S.A.

Table 2021-2026 Braskem S.A. Rigid Plastics Product Capacity Production Price Cost

Production Value

Figure 2021-2026 Braskem S.A. Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Braskem S.A. Rigid Plastics Market Share

Table CHIMEI Corporation Information

Table SWOT Analysis of CHIMEI Corporation

Table 2021-2026 CHIMEI Corporation Rigid Plastics Product Capacity Production Price

Cost Production Value

Figure 2021-2026 CHIMEI Corporation Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 CHIMEI Corporation Rigid Plastics Market Share

Table Trinseo PLC Information

Table SWOT Analysis of Trinseo PLC

Table 2021-2026 Trinseo PLC Rigid Plastics Product Capacity Production Price Cost

Production Value

Figure 2021-2026 Trinseo PLC Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Trinseo PLC Rigid Plastics Market Share

Table TotalEnergies SE Information

Table SWOT Analysis of TotalEnergies SE

Table 2021-2026 TotalEnergies SE Rigid Plastics Product Capacity Production Price

Cost Production Value

Figure 2021-2026 TotalEnergies SE Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 TotalEnergies SE Rigid Plastics Market Share

Table Westlake Corporation Information

Table SWOT Analysis of Westlake Corporation

Table 2021-2026 Westlake Corporation Rigid Plastics Product Capacity Production Price Cost Production Value

Figure 2021-2026 Westlake Corporation Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Westlake Corporation Rigid Plastics Market Share

Table LG Chem Ltd. Information

Table SWOT Analysis of LG Chem Ltd.

Table 2021-2026 LG Chem Ltd. Rigid Plastics Product Capacity Production Price Cost Production Value

Figure 2021-2026 LG Chem Ltd. Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 LG Chem Ltd. Rigid Plastics Market Share

Table SK geo centric Co. Ltd. Information

Table SWOT Analysis of SK geo centric Co. Ltd.

Table 2021-2026 SK geo centric Co. Ltd. Rigid Plastics Product Capacity Production Price Cost Production Value

Figure 2021-2026 SK geo centric Co. Ltd. Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 SK geo centric Co. Ltd. Rigid Plastics Market Share

Table PetroChina Company Limited Information

Table SWOT Analysis of PetroChina Company Limited

Table 2021-2026 PetroChina Company Limited Rigid Plastics Product Capacity Production Price Cost Production Value

Figure 2021-2026 PetroChina Company Limited Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 PetroChina Company Limited Rigid Plastics Market Share

Table China Petroleum & Chemical Corporation Information

Table SWOT Analysis of China Petroleum & Chemical Corporation

Table 2021-2026 China Petroleum & Chemical Corporation Rigid Plastics Product Capacity Production Price Cost Production Value

Figure 2021-2026 China Petroleum & Chemical Corporation Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 China Petroleum & Chemical Corporation Rigid Plastics Market Share

Table NOVA Chemicals Corporation Information

Table SWOT Analysis of NOVA Chemicals Corporation
Table 2021-2026 NOVA Chemicals Corporation Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 NOVA Chemicals Corporation Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 NOVA Chemicals Corporation Rigid Plastics Market Share
Table Chevron Phillips Chemical Company LLC Information
Table SWOT Analysis of Chevron Phillips Chemical Company LLC
Table 2021-2026 Chevron Phillips Chemical Company LLC Rigid Plastics Product
Capacity Production Price Cost Production Value
Figure 2021-2026 Chevron Phillips Chemical Company LLC Rigid Plastics Capacity
Production and Growth Rate
Figure 2021-2026 Chevron Phillips Chemical Company LLC Rigid Plastics Market
Share
Table Saudi Basic Industries Corporation Information
Table SWOT Analysis of Saudi Basic Industries Corporation
Table 2021-2026 Saudi Basic Industries Corporation Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Saudi Basic Industries Corporation Rigid Plastics Capacity
Production and Growth Rate
Figure 2021-2026 Saudi Basic Industries Corporation Rigid Plastics Market Share
Table BASF SE Information
Table SWOT Analysis of BASF SE
Table 2021-2026 BASF SE Rigid Plastics Product Capacity Production Price Cost
Production Value
Figure 2021-2026 BASF SE Rigid Plastics Capacity Production and Growth Rate
Figure 2021-2026 BASF SE Rigid Plastics Market Share
Table Reliance Industries Limited Information
Table SWOT Analysis of Reliance Industries Limited
Table 2021-2026 Reliance Industries Limited Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Reliance Industries Limited Rigid Plastics Capacity Production and
Growth Rate
Figure 2021-2026 Reliance Industries Limited Rigid Plastics Market Share
Table Lotte Chemical Corporation Information
Table SWOT Analysis of Lotte Chemical Corporation
Table 2021-2026 Lotte Chemical Corporation Rigid Plastics Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Lotte Chemical Corporation Rigid Plastics Capacity Production and

Growth Rate

Figure 2021-2026 Lotte Chemical Corporation Rigid Plastics Market Share

Table Mitsubishi Chemical Group Corporation Information

Table SWOT Analysis of Mitsubishi Chemical Group Corporation

Table 2021-2026 Mitsubishi Chemical Group Corporation Rigid Plastics Product
Capacity Production Price Cost Production Value

Figure 2021-2026 Mitsubishi Chemical Group Corporation Rigid Plastics Capacity
Production and Growth Rate

Figure 2021-2026 Mitsubishi Chemical Group Corporation Rigid Plastics Market Share

Table Covestro AG Information

Table SWOT Analysis of Covestro AG

Table 2021-2026 Covestro AG Rigid Plastics Product Capacity Production Price Cost
Production Value

Figure 2021-2026 Covestro AG Rigid Plastics Capacity Production and Growth Rate

Figure 2021-2026 Covestro AG Rigid Plastics Market Share

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