



Plastics Industry Trends

A snapshot of materials, technology
and top industry challenges

Plastics News

MARCH 2015



Objectives

To assess:

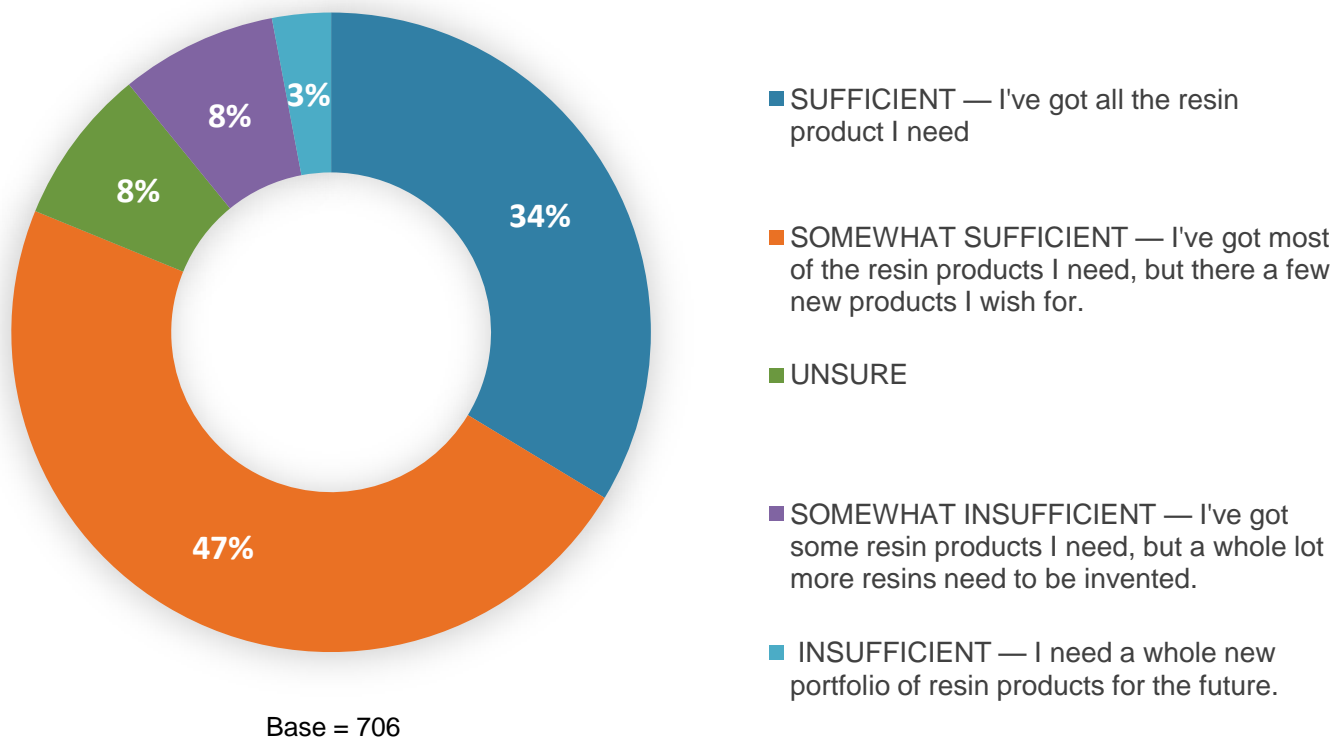
- Current use of materials and technology and unmet needs
- Changing role of the materials supplier
- Top industry issues and challenges

Methodology:

- Online survey administered via email invitation to plastics industry professionals in February 2015.
- Multiple sample lists including subscribers to *Plastics News* and registrants to DuPont Packaging & Industrial Polymer and DuPont Performance Polymers web sites.
- Response is about 50/50 from the two sources.
- 813 respondents qualified themselves as being involved in the selection, use or purchase of resins, polymers or elastomers.
 - Most respondents use engineering polymers, general polymers and elastomers.
 - Job functions are primarily research & development, management and the design community.
 - Markets primarily served are automotive, industrial and electrical/electronic.
 - Nearly half of respondents are based in the U.S.; one fourth in Europe and the rest from regions around the world.

Current Materials Portfolio Needs Augmented to Meet Industry Need

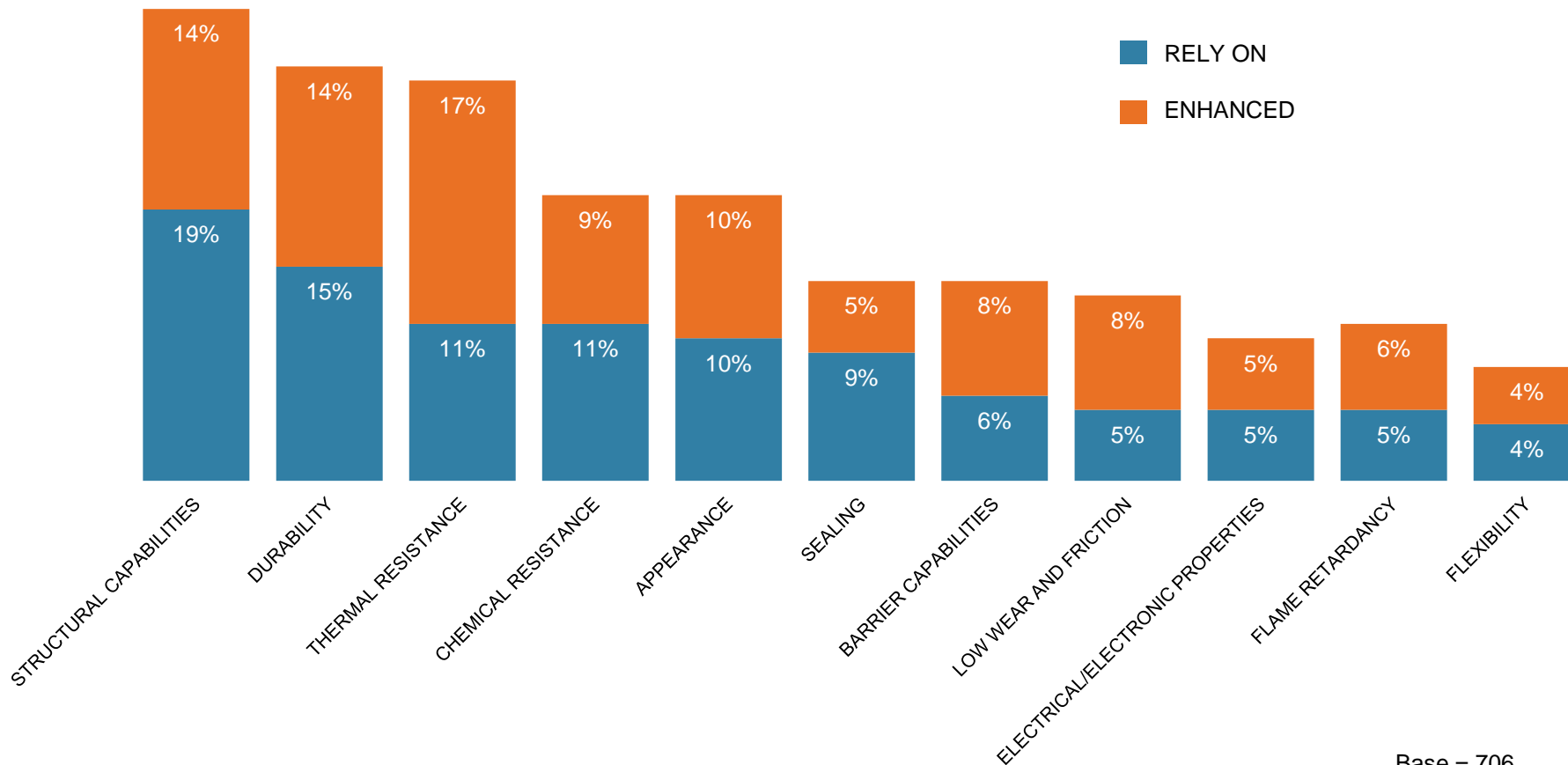
*While 34% of the plastics community is fully satisfied with the current resin portfolio, **more than half say they have unmet needs.***



QUESTION:

How sufficient is today's resins portfolio for the development of products that meet industry needs?

Industry Wants to Enhance the Same Material Attributes They Value Today



Base = 706

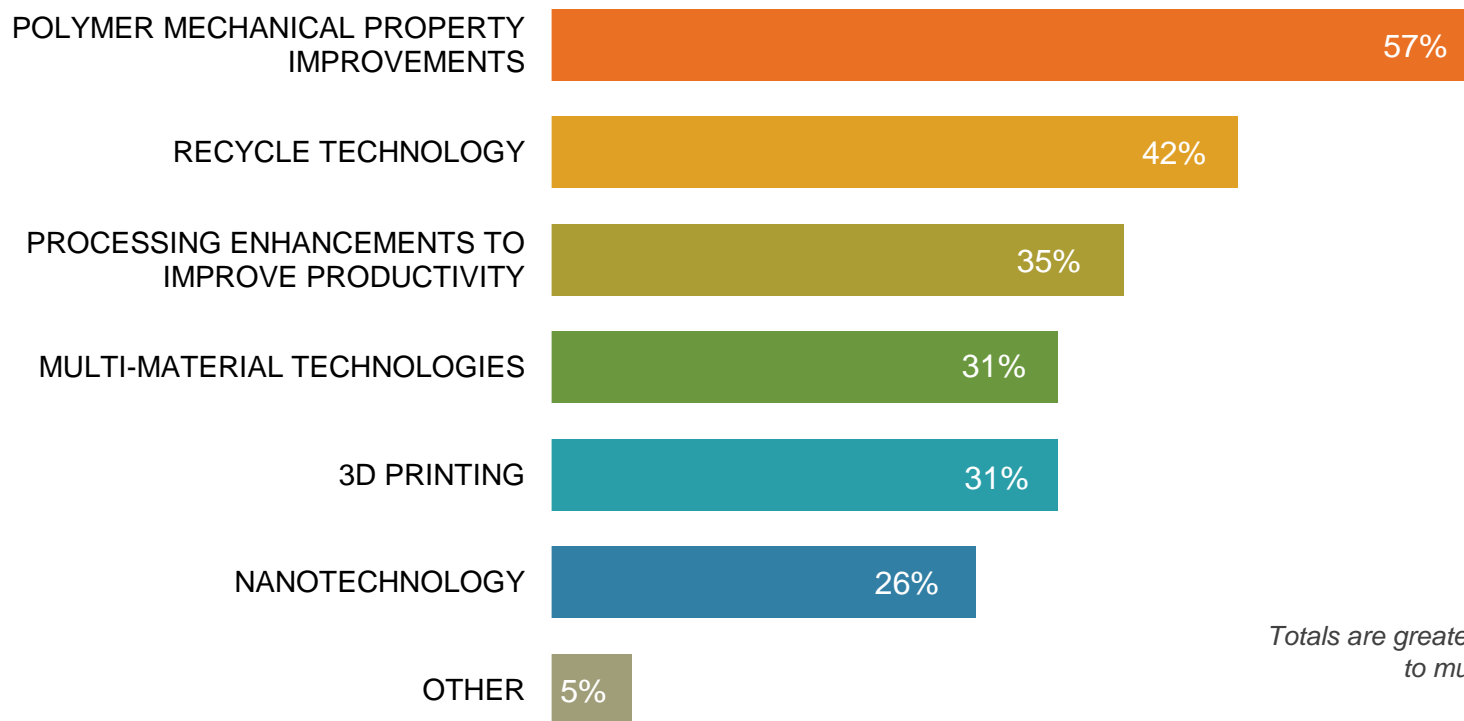
QUESTIONS:

Please rank the Top 3 material properties you **RELY ON** most.

Please rank the Top 3 material properties you would like to see **ENHANCED** in resins.

Polymer Property Enhancements Tops the List of Technology Requests

About 3 in 5 plastics professionals surveyed see a need for improved polymer properties — with ‘recycle technology’ not too far behind.



Totals are greater than 100 due to multiple answers.

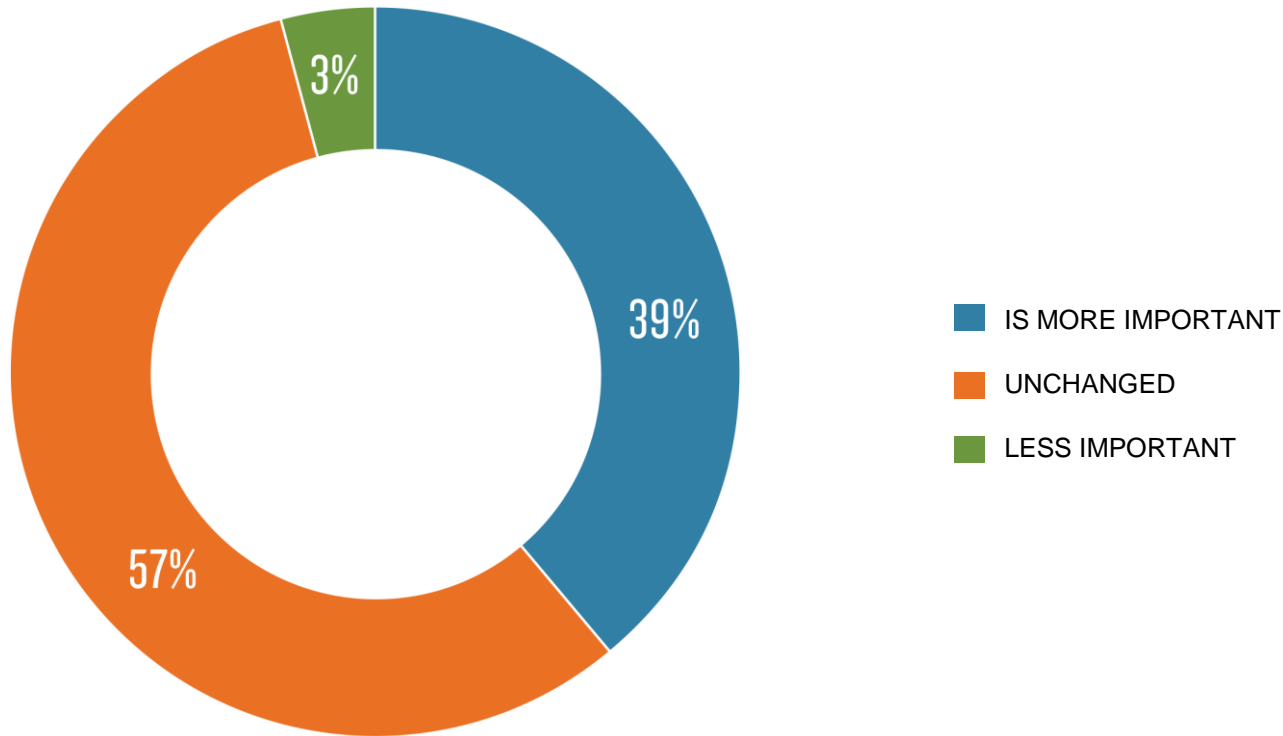
Base = 655

QUESTION:

Which of the following technologies need to be enhanced?

Materials Suppliers are More Important Today

Nearly 40% say the role of material supplier is more important than it was 3 years ago.

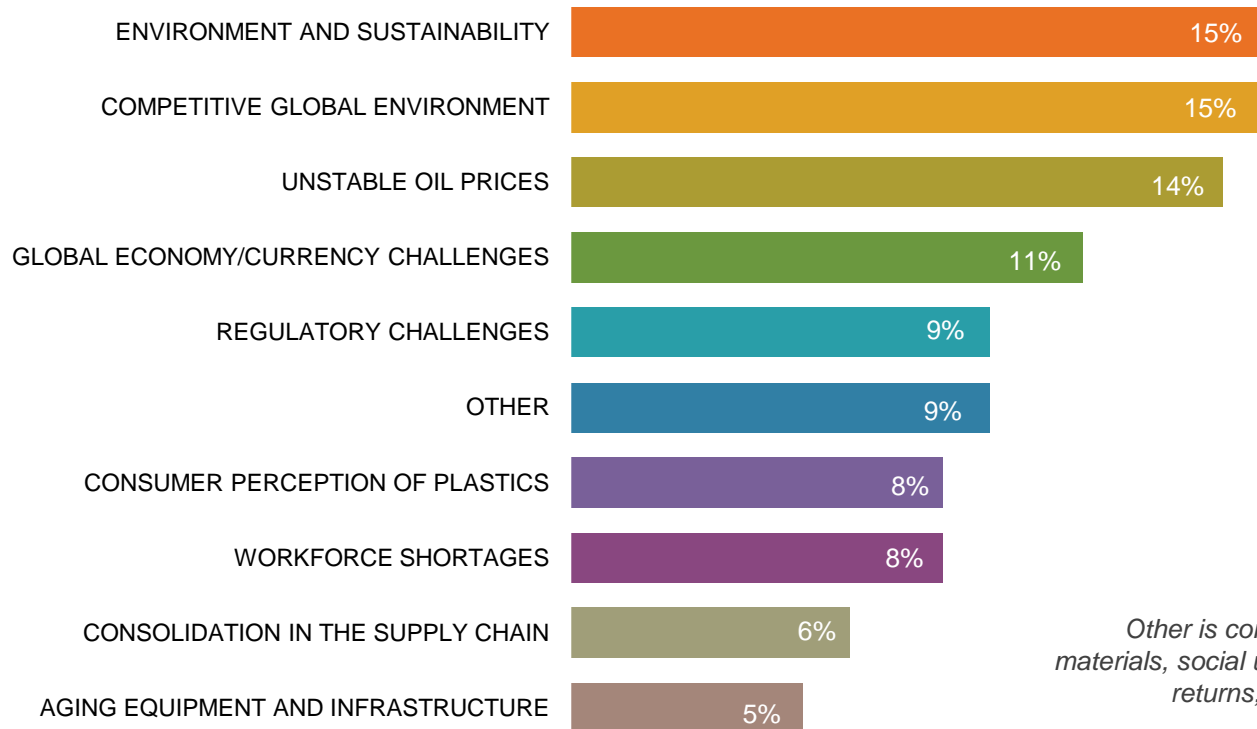


Base = 671

QUESTION:

How has the role of the material supplier changed in the past 3 years (since the last NPE)?

Environment, Sustainability, Competitive Global Environment and Unstable Oil Prices Top the List Plastics Industry Issues



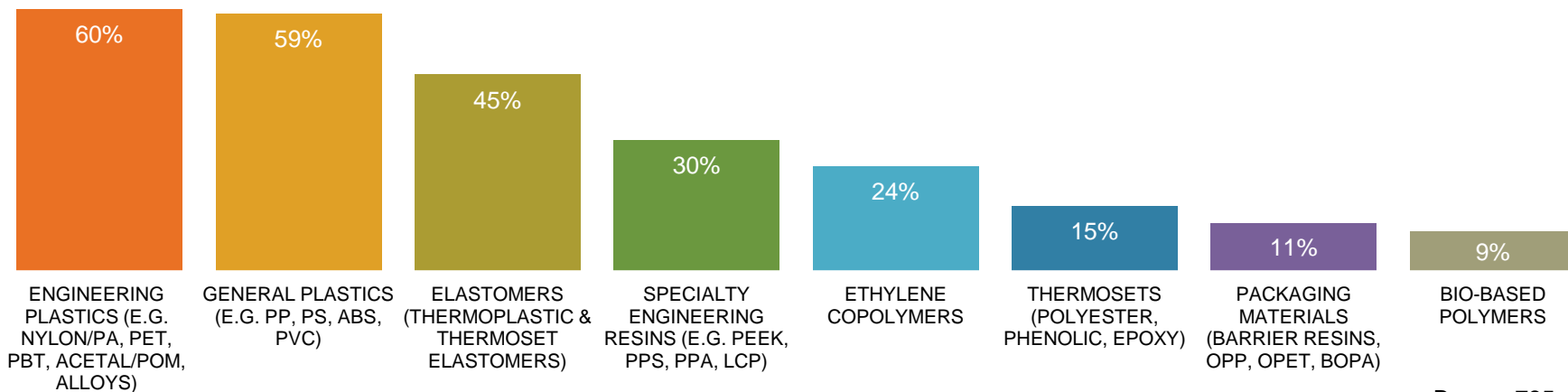
Other is composed of counterfeit products and materials, social unrest and maintaining shareholder returns, which each received less than 4%

Base = 688

QUESTION:

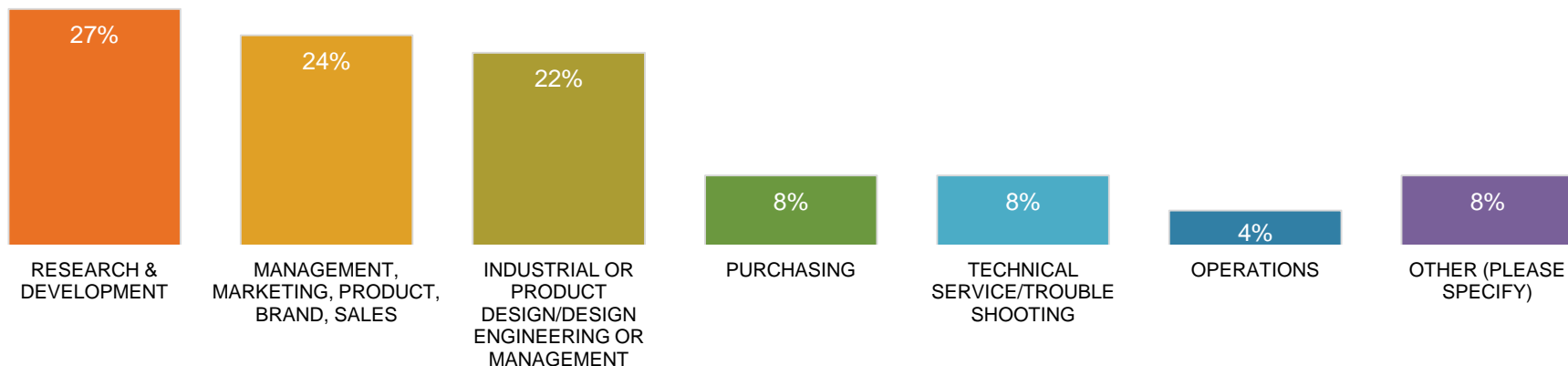
Please rank in order what you believe are the top 3 concerns facing the plastics industry.

What type of polymers do you typically work with?



Base = 785

Which title best describes your role?



Other includes quality control/quality assurance, finance/human resources/consulting services, software or Information Technology (IT)

Base = 767

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