

2025

SIZE & IMPACT

EXECUTIVE SUMMARY

One industry that makes a **positive impact**

Copyright and Disclaimer

Published by the Plastics Industry Association (PLASTICS) © 2025. This report is copyright 2025, the Plastics Industry Association (PLASTICS). All rights reserved. Certain methodologies used to prepare this report are the sole property of Probe Economics LLC or Inforum.

This report is offered in good faith and is believed to be accurate at the time of its preparation, but is offered without warranty of any kind, either express or implied as to merchantability, fitness for a particular purpose, or any other matter. PLASTICS does not endorse any products or third parties that may be mentioned in the report and accepts no responsibility for any loss or damage arising from its use. We strongly recommend that you seek separate counsel for guidance on the accuracy and appropriateness of the report.



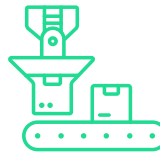
IMPACTFUL AND VITAL: THE U.S. PLASTICS INDUSTRY IN FOCUS

PLASTICS MANUFACTURING: FASTER JOB GROWTH, STEADIER OUTPUT (2014-2024)



ANNUAL EMPLOYMENT GROWTH

Plastics Manufacturing **+1.3%**
Overall Manufacturing **+0.5%**

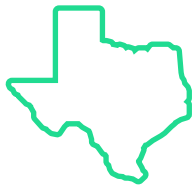


ANNUAL SHIPMENTS GROWTH

Plastics Manufacturing: **+0.2%**
Overall Manufacturing **-0.4%**

PLASTICS INDUSTRY DRIVES JOB CREATION: 1.71 MILLION EMPLOYED

TEXAS



90.1K

Highest level of
plastics employment

MICHIGAN



16

Highest plastics employment
concentration*

THE U.S. PLASTICS INDUSTRY REMAINS VITAL, SUPPORTED BY RESILIENT AND SUSTAINED DEMAND.



\$551 Billion

Plastics industry shipments
in 2024

\$754 Billion

Including suppliers' shipments
to the plastics industry

PLASTICS OUTPUT AND CONSUMPTION IMPACT IN 2024



8th LARGEST INDUSTRY IN 2023**

Plastic Products Manufacturing

PLASTIC PRODUCTS PERSONAL CONSUMPTION



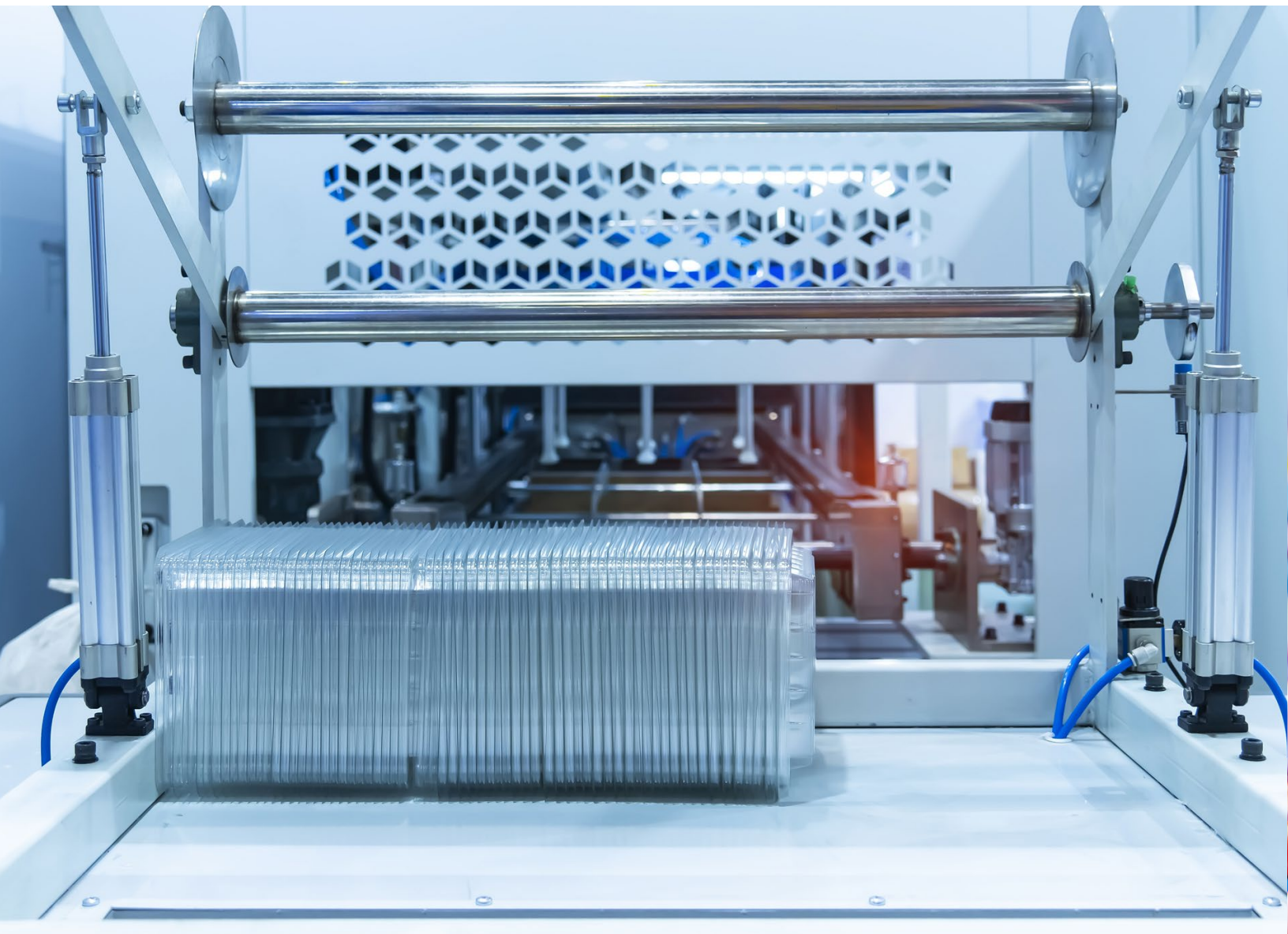
75% IN 2024

*per 1,000 non-farm jobs

**defining industries at the 4-digit NAICS level

One industry that makes a positive impact

The 2025 Size and Impact Report indicates that the U.S. plastics industry remains one of the economy's largest sectors and poised for continued growth. While most plastics are used in manufacturing, their role in services is becoming increasingly significant. As highlighted in another Plastics Industry Association (PLASTICS) study, the 2025 Global Trends Report, abundant petrochemical feedstocks have bolstered domestic production to meet stable demand, as well as U.S. exports, benefiting U.S. plastics companies, the industry, and the broader economy.



EXECUTIVE SUMMARY

This report tells the story of the U.S. plastics industry through numbers. It addresses several important questions, including:

- How large is the plastics industry's economic footprint?
- How does it compare to other industries?
- How fast is it expanding?
- Where are its biggest hubs across the U.S.?
- How does it affect the broader economy?
- What's next on the horizon for the plastics industry?

“When suppliers to the plastics industry were included, jobs grew to 1.71 million, and total shipments grew to \$754.5 billion in 2024.”

Plastics Industry: FAST FACTS

- The U.S. plastics industry is large, accounting for over a million jobs (1,066,500) and \$550.7 billion in shipments in 2024.
- Texas had the most plastics industry employment (90,100) in 2024.
- As a percentage of total non-farm employment, the plastics industry is most important to Michigan, where it accounted for 16.0 of every 1,000 non-farm jobs in 2024.
 - Indiana was second (15.7).
- When suppliers to the plastics industry are considered, plastics-related U.S. jobs grow to 1.71 million, and total shipments grow to \$754.5 billion.
- As measured by gross output, the plastic products portion of the plastics industry was the eighth largest U.S. industry in 2023 (the latest year for which data are available).
- The plastic materials and synthetics portion of the plastics industry (including rubber and fiber) was the 16th largest industry in 2023.
- A success story for the U.S. economy, plastics manufacturing employment grew 1.3% per year from 2014 to 2024, outpacing total manufacturing, which saw employment grow only 0.5% per year during the same period.
- Despite the COVID recession, real (inflation-adjusted) plastics manufacturing shipments grew at a 0.2% annual rate from 2014 to 2024, while real shipments by manufacturing as a whole fell at a 0.4% rate.

Plastics Industry: Full Scale View

Table S-1 summarizes the plastics industry by dividing it into categories called: Plastics Manufacturing, Plastics Wholesale Trade, Captive Plastic Products Manufacturing, and Upstream Industries. The first three categories comprise what the authors call the “plastics industry.” Captives are plastic processing activities located in establishments, such as automobile assembly and milk bottling plants, which are not classified by the government, or by most economists, as being part of the plastics industry.

Cross-Industry Benchmarks

To rank plastics among other industries, the authors considered 82 manufacturing industries defined by the 4-digit level of the North American Industry Classification System (NAICS), using data available through 2023.

- Plastic Products (NAICS 3261), which accounted for most of the plastic processing industry, was the eighth largest U.S. manufacturing industry in terms of shipments in 2023.
- Resin, Synthetic Rubber and Artificial & Synthetic Fibers & Filament (NAICS 3252), which primarily includes the Plastic Materials and Resins Industry, was the 16th-ranked manufacturing industry in 2023.

The following conclusions can be drawn from Table S-1:

- The U.S. plastics industry, as it is documented by U.S. Government data, operated 15,123 manufacturing establishments, employed 827,900 people and made shipments worth \$453.0 billion in 2024. This excludes establishments producing captive plastic products or supplying goods and services to the plastics industry.
- When captives are included in the definition of the plastics industry, the number employed rose to 1,066,500 in 2024. Another 647,300 people were employed by the upstream industries that supplied the industry, which brought the total year 2024 employment total to 1.71 million – 1.1% of the U.S. non-farm workforce.
- The plastics industry generated \$550.7 billion in shipments in 2024. Another \$203.8 billion was generated upstream by supplying industries, bringing the total shipments of the plastics industry to \$754.5 billion.
- Table S-1 does not include downstream impacts on the industries that use plastics, or on the consumers who buy the products containing plastics.

TABLE S-1

PLASTICS INDUSTRY IMPACTS, 2024

	Number of Establishments	Employees (Thousands)	Value of Industry Shipments (\$Millions)
Plastics Manufacturing			
NAICS 325211 Plastics Materials and Resins	1,440	88.8	108,856
NAICS 325991 & 3261 Plastics Products	10,228	673.6	275,721
NAICS 3332491 Plastics Working Machinery	400	12.1	3,712
NAICS 33351105 Molds for Plastics	480	13.0	2,685
Plastics Manufacturing Totals	12,548	787.5	390,973
Plastics Wholesale Trade			
NAICS 424610 Wholesale Trade for Plastics Materials, Forms and Shapes	2,575	40.4	62,011
Government-Documented Plastics Industry	15,123	827.9	452,984
Captive Plastic Products	N/A	238.7	97,690
Plastics Industry	N/A	1,066.5	550,674
Upstream Industries	N/A	647.3	203,790
Full Impact *	N/A	1,713.8	754,463

*Excluding downstream impacts

Industry Growth Rates

- Over the past 27 years, plastics industry employment, inflation-adjusted (real) shipments, and real value added have outperformed the overall manufacturing sector—largely because plastics remain a relatively new material compared to other materials and manufacturing methods.
- Employment in the plastics manufacturing industry declined by 0.7% per year between 1997 and 2024—outperforming overall U.S. manufacturing, where employment fell by 1.1% annually over the same period, as can be seen in Table S-2.
- Employment in plastics manufacturing declined from 2000 through 2010 before entering a rising trend. This pattern mirrored the broader manufacturing sector, though plastics employment was more volatile—typically falling more sharply during recessions and recovering more quickly thereafter.
- Real shipments in plastics manufacturing rose 0.1% per year between 1997 and 2024, while real shipments in all manufacturing sectors declined by 0.1% annually over the same period.
- Real value added grew 0.9% per year from 1997 to 2024, bouncing back strongly after the COVID recession.
- Productivity in plastics manufacturing—measured as real shipments per employee—grew by 0.8% per year from 1997 to 2024. By comparison, productivity in overall manufacturing grew at a slightly higher rate of 1.0% per year.
- The number of plastics industry establishments declined gradually between 1997 and 2024, reaching 15,123 in 2024.

TABLE S-2

COMPARATIVE GROWTH RATES, 1997-2024

	Plastics Manufacturing	All Manufacturing
Employment	1.3%	0.5%
Real Shipments	0.2%	-0.1%
Real Value Added	2.0%	-0.1%
Productivity Growth	-0.6%	-0.2%

For nearly three decades, the plastics industry has outpaced overall manufacturing in employment, real shipments, and real value added—driven by plastics’ versatility as a relatively new material.

Geographic Reach of the Plastics Industry

- The plastics industry is found in all 50 states and the District of Columbia. As can be seen from Table S-3, Texas had the most plastics industry employees in 2024, followed by Ohio, Michigan, California, Pennsylvania, Illinois, Indiana, Wisconsin, North Carolina and Georgia.
- An alternative metric—plastics industry employees per 1,000 nonfarm employees—indicates the concentration of the plastics industry in each state, or how much a state specializes in plastics. According to this measure, Table S-4 shows that in 2024, Michigan had the highest concentration, followed by Indiana, Wisconsin, Kentucky, Ohio, South Carolina, Tennessee, Alabama, West Virginia, and Pennsylvania.
- The states with the highest concentrations of plastics industry employees tend to have the highest concentrations of manufacturing activity, which is consistent with the fact that most plastic products go into manufactured goods.

Upstream Supply Chain Impacts

Jobs are created not only within the plastics industry but also across industries that directly or indirectly supply it with goods and services. These upstream industries provide fuel, spare parts, office supplies, accounting, transportation, and more. As discussed in connection with Table S-1, employment and shipments in these supplier industries contribute significantly to the overall economic impact of plastics.

- In 2024, upstream industries supported 647,300 jobs to meet the plastics industry’s demand—meaning every plastics job supports approximately 0.6 jobs elsewhere in the economy.
- Upstream industries also generated \$203.8 billion in shipments in 2024 to supply goods and services to the plastics industry.

TABLE S-3

TOP STATES FOR PLASTICS EMPLOYMENT
(PLASTICS INDUSTRY, 2024)

Rank	State	Plastics Employment (Thousands)
1	Texas	90.1
2	Ohio	78.6
3	Michigan	71.9
4	California	70.1
5	Pennsylvania	57.5
6	Illinois	54.2
7	Indiana	51.2
8	Wisconsin	42.7
9	North Carolina	41.2
10	Georgia	40.6
U.S. Total		1,066.5

TABLE S-4

TOP STATES FOR PLASTICS CONCENTRATION
(PLASTICS INDUSTRY, 2024)

Rank	State	Plastics Employees per 1,000 Non-Farm Employees
1	Michigan	16.0
2	Indiana	15.7
3	Wisconsin	14.1
4	Kentucky	14.0
5	Ohio	13.9
6	South Carolina	13.0
7	Tennessee	11.4
8	Alabama	10.4
9	West Virginia	10.1
10	Pennsylvania	9.4
U.S. Average		6.8

Downstream User Impacts

Some plastic products—such as toys and wastebaskets—are final goods ready for use. However, most are intermediate goods, either supporting services or used in further manufacturing before becoming part of a final product. Virtually all plastic products eventually become components of a final good or are used in the delivery of a service.

- In 2024, an impressive 33.1% of the final consumption of plastic products—by value—was used in service sectors such as healthcare, food services and drinking places, retail and wholesale trade, and other service industries.
- 11.3% of final plastic products were used in the construction industry.
- A large share (27.9%) went into non-durable goods: food, tobacco and spirits (7.8%); plastic products (16.2%); and other non-durables (3.9%).
- Durable goods accounted for the remaining 19.3% share: transportation equipment (10.6%); and other durables (8.7%).
- In 2024, 75.4% of plastics-containing goods and services were ultimately purchased for personal consumption by households, 31.7% went into private fixed investment, and 7.3% were used by state, local, and federal government agencies.¹
- In 2024, the most intensive final user of plastic products—measured by the value of plastic content per dollar of final product or service—was the plastics products industry itself, followed by coffee and tea; seasonings and dressings; mattresses, blinds, and shades; soft drinks and ice; office supplies (excluding paper); sign manufacturing; and all other transportation equipment.

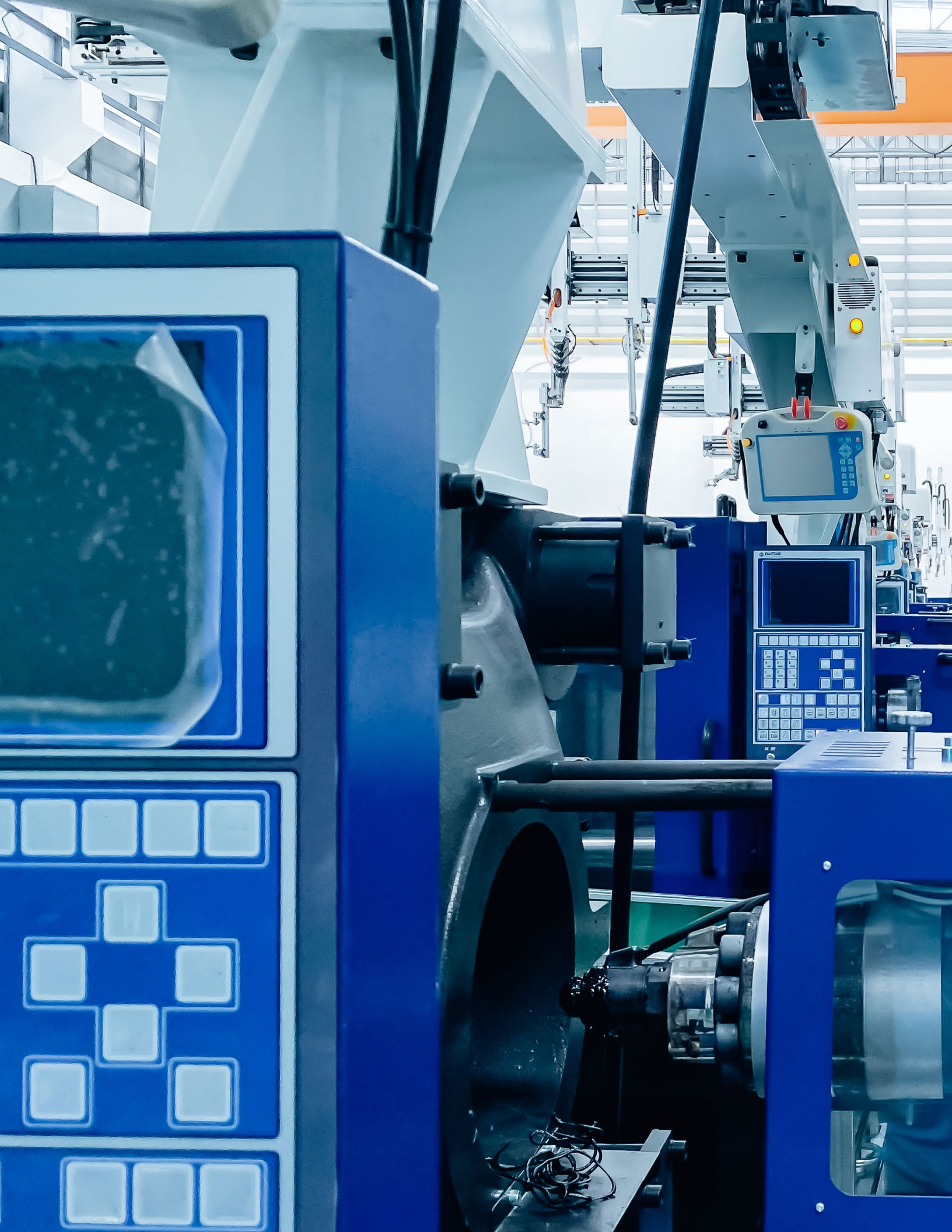
Industry Outlook

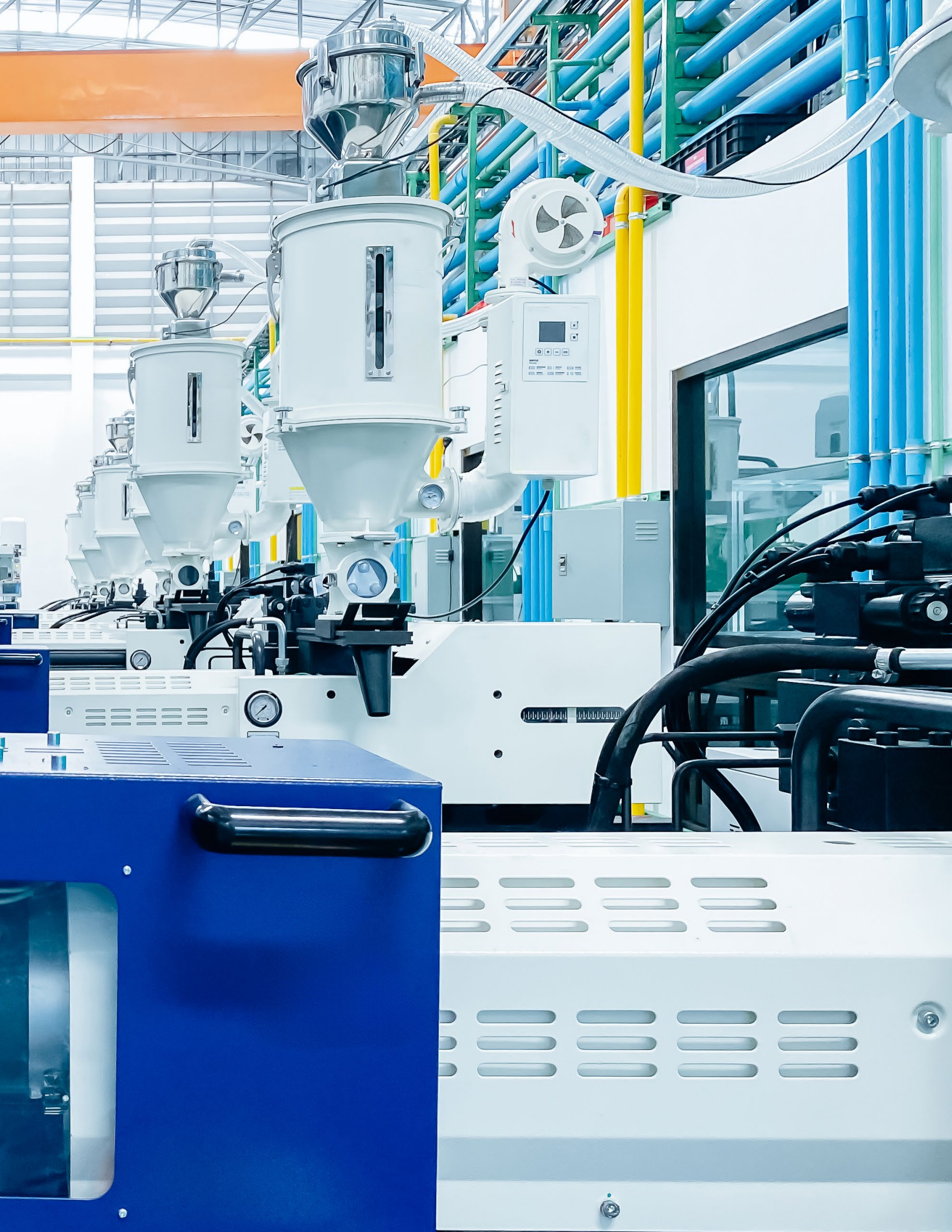
In the final section of this report, Perc Pineda, Ph.D., Chief Economist with the Plastics Industry Association (PLASTICS), offers his outlook for the plastics industry, and numerical forecasts for employment and shipments.

- Growth in the plastics industry is expected to slow this year as U.S. economic growth returns to its long-run trend following three years of above-trend growth. Thus far, demand for plastics has remained stable, but is missing a growth catalyst in the form of investment spending on new projects.
- The plastics industry primarily supports manufacturing across diverse industries. This close integration is evident in the strong correlation between real plastics shipments and manufacturing output—especially in durable goods like automotive and housing. As manufacturing expands or contracts, plastics demand tends to follow, making it a critical barometer of industrial performance.
- Uncertainties related to the shifts in the U.S. trade and tariff policy is a headwind for the manufacturing sector – capping the growth momentum in the plastics industry's end markets this year. However, it could encourage import substitution sustaining plastics manufacturing. It is unlikely that trade issues will remain unresolved indefinitely.
- U.S. plastics industry employment is expected to decline by 1.1% in 2025—after the 1.9% decrease in 2024. A 0.5% increase is projected for 2026 as new hires in plastics manufacturing migrate from complementary manufacturing sectors.
- Real plastics industry shipments are expected to decrease by 0.5% this year following a 1.7% increase last year - as the industry recalibrates its strategy in response to the short-term effects of tariffs and its long-term risks. Residual effects of tariffs would cap shipments' growth to 1.3% next year.

In the sections that follow, the authors provide data, discuss definitions and methodology, and develop the conclusions just discussed.

¹ These percentages add up to more than 100%, because the 22.5% that was provided by imports (net of exports)—not supplied by domestic producers—was not deducted. The deduction would be required if National Income and Product Account (NIPA) accounting was used.







plasticsindustry.org

1425 K Street, NW, Suite 500
Washington, D.C. 20005
202.974.5200