

One industry
that makes a
positive impact



2026

SIZE & IMPACT

EXECUTIVE SUMMARY

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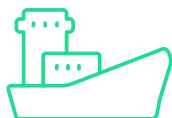
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Plastics Industry: A Critical Engine of U.S. Economic Activity, Jobs, and Growth



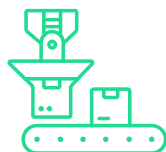
\$533.6 Billion

Plastics industry shipments in 2025

\$715.8 Billion

Including suppliers' shipments to the plastics industry

Plastics Manufacturing: Stronger Value Added and Job Growth (2015-2025)



VALUE ADDED GROWTH*

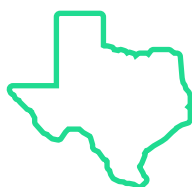
Plastics Manufacturing **+3.2%**
Overall Manufacturing **+2.2%**



EMPLOYMENT GROWTH

Plastics Manufacturing: **+0.8%**
Overall Manufacturing **-0.3%**

1.7 Million Jobs Power Plastics



TEXAS

91.6K

Largest plastics employment



MICHIGAN

15.4

Highest plastics employment concentration**

Plastics Manufacturing: Significant Scale and Broad Consumer Reach



8th LARGEST INDUSTRY IN 2024***

Plastic Products Manufacturing



77%

of plastic products go to personal consumption

The U.S. plastics industry remains resilient and vital, supported by sustained demand and a competitive domestic supply base.

*In real terms, plastics value added rose 0.3%, versus a 0.6% decline in overall manufacturing.

**Per 1,000 non-farm jobs

***Defining industries at the 4-digit NAICS level

One industry that makes a positive impact

The 2026 Size and Impact Report underscores the strength and reach of the U.S. plastics industry. One of the economy's largest sectors, plastics is positioned for continued growth, supported by stable demand, expanding applications in both manufacturing and services, and abundant domestic petrochemical feedstocks. As highlighted in PLASTICS' 2026 Global Trends Report, these feedstock advantages are strengthening U.S. production and exports, reinforcing the industry's competitiveness and its broader contribution to the U.S. 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 with other industries?
- How fast is it growing?
- Where are its major hubs across the United States?
- How does it contribute to the broader economy?
- What lies ahead for the plastics industry?

“When suppliers to the plastics industry were included, jobs grew to 1.66 million, and total shipments grew to \$715.8 billion in 2025.”



Plastics Industry: FAST FACTS

- The U.S. plastics industry is a major contributor to the economy, accounting for more than 1 million jobs (1,049,200) and generating \$533.6 billion in shipments in 2025.
- Texas had the largest plastics industry workforce, with 91,600 employees in 2025.
- Measured as a share of total nonfarm employment, the plastics industry was most concentrated in Michigan, where it accounted for 15.4 of every 1,000 nonfarm jobs in 2025.
 - Indiana ranked second, at 15.3 per 1,000.
- Including suppliers to the plastics industry, plastics-related employment reached 1.66 million jobs, and total shipments increased to \$715.8 billion.
- Measured by gross output, the plastic products segment of the plastics industry was the eighth-largest U.S. manufacturing industry in 2024, the latest year for which data are available.
- The plastic materials and synthetics portion of the plastics industry (including rubber and fiber) ranked as the 16th-largest U.S. manufacturing industry in 2024.
- A success story for the U.S. economy, plastics manufacturing employment grew at an average annual rate of 0.8% from 2015 to 2025, outpacing overall manufacturing, where employment increased by just 0.3% per year over the same period.
- Reflecting the effects of the COVID-19 recession, inflation-adjusted (real) shipments in plastics manufacturing declined at an average annual rate of 0.4% from 2015 to 2025. Real shipments for overall manufacturing declined at the same annual rate.

Plastics Industry: Full Scale View

Table S-1 summarizes the plastics industry by dividing it into the following sectors: Plastics Manufacturing, Plastics Wholesale Trade, Captive Plastic Products Manufacturing, and Upstream Industries. The first three sectors comprise what the authors call the “plastics industry.” Captive plastic products manufacturing refers to plastic processing activities within establishments—such as automobile assembly plants and milk bottling facilities—that are not classified by the government, or by most economists, as 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 North American Industry Classification (NAICS) system. Data were available through 2024.

- 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 2024.
- 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 2024.

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

- As defined by U.S. government data, the U.S. plastics industry operated 14,983 manufacturing establishments, employed 817,100 people, and generated \$443.0 billion in shipments in 2025. This definition excludes establishments producing captive plastic products as well as businesses that supply goods and services to the plastics industry.
- When captive production is included in the definition of the plastics industry, total employment increased to 1,049,200 in 2025. An additional 615,500 people were employed by upstream industries supplying the plastics industry, bringing total employment to 1.66 million—equivalent to 1.1% of the U.S. nonfarm workforce.
- The plastics industry generated \$533.6 billion in shipments in 2025. Upstream supplying industries generated an additional \$182.2 billion, bringing total shipments associated with the plastics industry to \$715.8 billion.
- Table S-1 does not include downstream impacts of the plastics industry on industries that use plastics or on the consumers who purchase products containing plastics.

TABLE S-1

PLASTICS INDUSTRY IMPACTS, 2025

	Number of Establishments	Employees (Thousands)	Value of Industry Shipments (\$Millions)
Plastics Manufacturing			
NAICS 325211 Plastics Materials and Resins	1,455	84.0	104,380
NAICS 325991 & 3261 Plastics Products	10,103	668.0	260,545
NAICS 3332491 Plastics Working Machinery	394	11.0	3,849
NAICS 33351105 Molds for Plastics	503	11.2	2,580
Plastics Manufacturing Totals	12,455	774.2	371,354
Plastics Wholesale Trade			
NAICS 424610 Wholesale Trade for Plastics Materials, Forms and Shapes	2,528	42.8	71,676
Government-Documented Plastics Industry	14,983	817.1	443,030
Captive Plastic Products	N/A	232.2	90,564
Plastics Industry	N/A	1,049.2	533,594
Upstream Industries	N/A	615.5	182,224
Full Impact *	N/A	1,664.8	715,818

*Excluding downstream impacts

Industry Growth Rates

- Over the past 28 years, the plastics industry has outperformed the overall manufacturing sector in employment, real shipments, and real value added—the industry's inflation-adjusted contribution to GDP. This performance reflects the continued expansion of plastics as a relatively modern material, replacing traditional materials in many applications, as well as U.S. producers' access to lower-cost feedstocks than most global competitors.
- Employment in the plastics manufacturing industry declined by 0.7% per year between 1997 and 2025 on a compound annual growth rate (CAGR), outperforming overall U.S. manufacturing, where employment declined by 1.1% annually. Between 2015 and 2025 plastics employment rose 0.8% per year, compared with 0.3% for overall U.S. manufacturing.
- Real shipment in plastics manufacturing declined by 0.1% annually between 1997 and 2025, compared with an annual decline of 0.2% for overall manufacturing.
- Real value added grew 0.3% per year from 1997 to 2025, rebounding after the COVID-19 recession, while real value added in manufacturing as a whole declined 0.5% per year decline in real value added. Over 2015 and 2025, nominal value added in plastics manufacturing increased 3.2% per year compared with 2.2% for overall manufacturing.
- Productivity in plastics manufacturing, measured as real shipments per employee, increased by 0.7% annually between 1997 and 2025, broadly in line with the long-term trends in overall U.S. manufacturing, where productivity increased by an average of 1.0% per year.
- The number of plastics industry establishments declined gradually between 1997 and 2025, reaching 14,983.

TABLE S-2

COMPARATIVE GROWTH RATES, 1997–2025

	Plastics Manufacturing	All Manufacturing
Employment	-0.7%	-1.1%
Real Shipments	-0.1%	-0.2%
Real Value Added	0.3%	-0.5%
Productivity Growth	0.7%	1.0%

The plastics industry has outpaced overall manufacturing in employment, real shipments, and real value added, driven by the versatility of plastics and their expanding use across the economy.

Geographic Reach of the Plastics Industry

- The plastics industry has a presence in all 50 states and the District of Columbia. As shown in Table S-3, Texas had the largest plastics industry workforce in 2025, followed by Ohio, Michigan, California, Pennsylvania, Illinois, Indiana, Wisconsin, North Carolina, and Georgia.
- An alternative measure of industry concentration—plastics industry employees per 1,000 nonfarm employees—indicates the degree to which a state's workforce is specialized in plastics manufacturing. As shown in Table S-4, Michigan had the highest concentration in 2025, followed by Indiana, Wisconsin, Ohio, Kentucky, 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, consistent with the fact that most plastic products are used in manufactured goods.

Upstream Supply Chain Impacts

Jobs are created not only within the plastics industry but also throughout the industries that directly and indirectly supply it with goods and services. These upstream industries provide fuel, machinery and spare parts, office supplies, accounting, transportation, and a wide range of other business inputs. As discussed in Table S-1, employment and shipments generated by these supplier industries contribute significantly to the overall economic impact of the plastics industry.

- In 2025, upstream industries supported 615,500 jobs to meet the plastics industry's demand, meaning that every plastics industry job supported approximately 0.6 additional jobs elsewhere in the economy.
- These upstream industries also generated \$182.2 billion in shipments in 2025 by supplying goods and services to the plastics industry.

TABLE S-3

TOP STATES FOR PLASTICS EMPLOYMENT
(PLASTICS INDUSTRY, 2025)

Rank	State	Plastics Employment (Thousands)
1	Texas	91.6
2	Ohio	77.5
3	Michigan	69.0
4	California	68.4
5	Pennsylvania	56.6
6	Illinois	53.3
7	Indiana	50.0
8	Wisconsin	42.0
9	North Carolina	40.6
10	Georgia	40.2
	U.S. Total	1,049.2

TABLE S-4

TOP STATES FOR PLASTICS CONCENTRATION
(PLASTICS INDUSTRY, 2025)

Rank	State	Plastics Employees per 1,000 Non-Farm Employees
1	Michigan	15.4
2	Indiana	15.3
3	Wisconsin	13.8
4	Ohio	13.7
5	Kentucky	13.6
6	South Carolina	12.8
7	Tennessee	11.2
8	Alabama	10.2
9	West Virginia	9.8
10	Pennsylvania	9.2
	U.S. Average	6.6

Downstream User Impacts

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

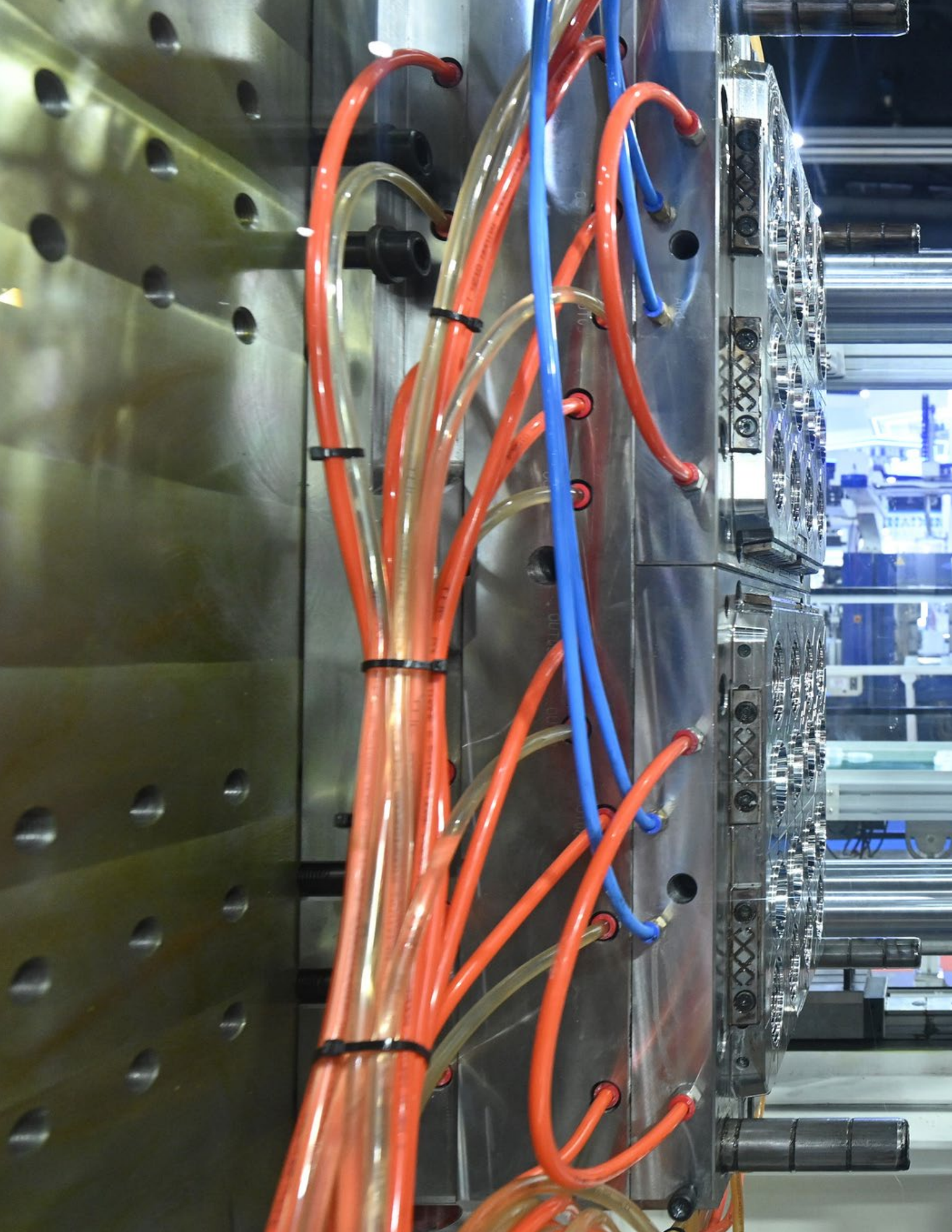
- In 2025, an impressive 34.0% of the final consumption of plastic products was used in service-related sectors such as healthcare, food services and drinking places, wholesale and retail trade, and other service industries.
- The construction industry accounted for 11.0% of final plastic products consumption.
- A substantial share (27.2%) was used in the production of nondurable goods, including food, tobacco, and beverages (7.8%); plastic products (15.4%); and other nondurables goods (4.0%).
- Durable goods accounted for the remaining 19.2%, including transportation equipment (10.3%) and other durable goods (8.9%).
- In 2025, 77.0% of plastics-containing goods and services were ultimately purchased by households for personal consumption, 30.6% were used for private fixed investment, and 15.6% were purchased by federal, state, and local government agencies.¹
- In 2025, the plastics products industry was the most plastics-intensive final user, measured by the value of plastic content per dollar of final output. It was followed by coffee and tea; seasonings and dressings; mattresses, blinds, and shades; soft drinks and ice; office supplies (excluding paper); sign manufacturing; and other transportation equipment. mattresses, blinds, and shades; soft drinks and ice; office supplies (excluding paper); sign manufacturing; and all other transportation equipment.

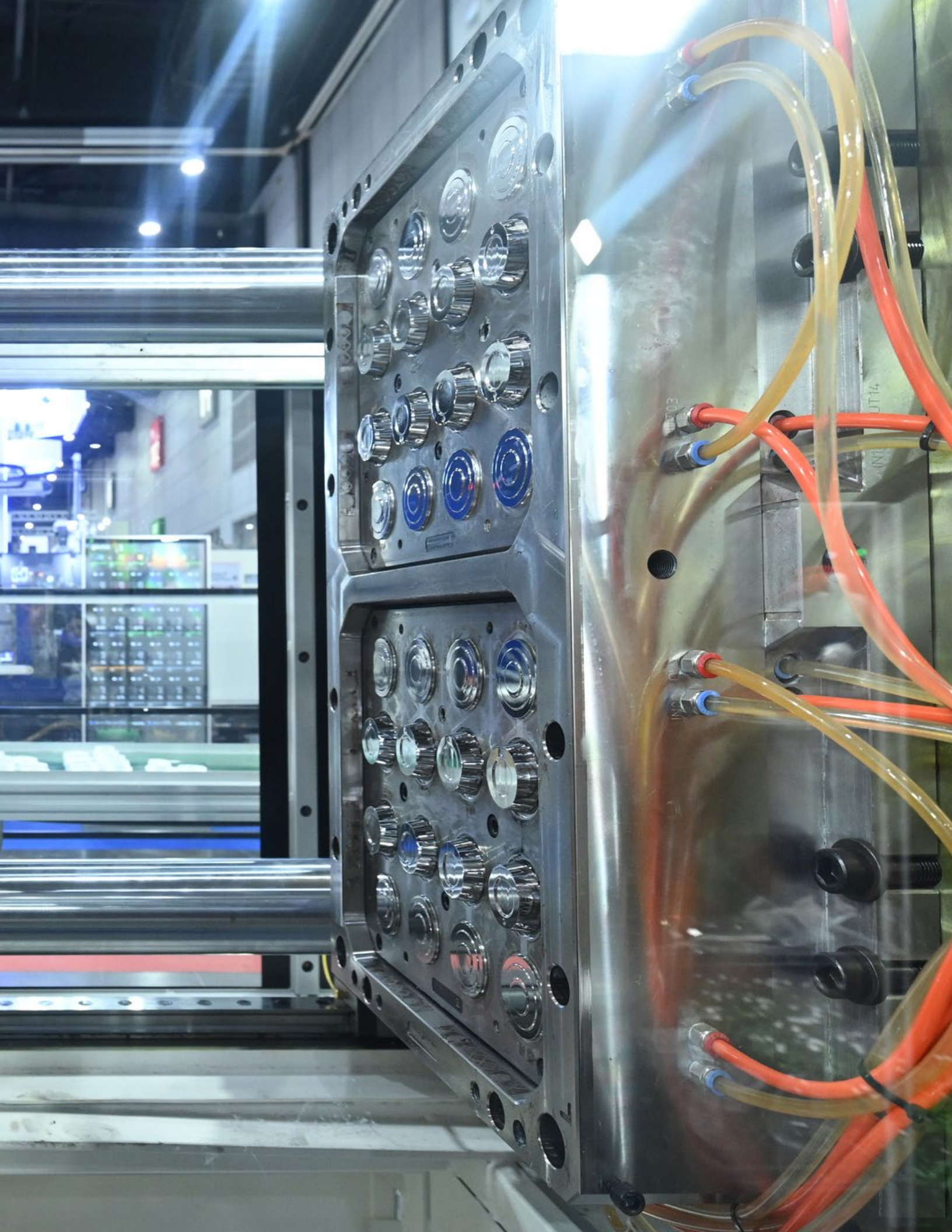
Industry Outlook

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

- The U.S. plastics industry remains resilient despite a mixed economic environment. Plastics continues to outperform broader manufacturing in real shipments, productivity, and real value added, supported by geographic flexibility, domestic feedstock advantages, and the essential role of plastics across a wide range of applications.
- Plastics demand remains stable, but the recovery is increasingly uneven across end markets. Consumer spending and business investment are providing support, while elevated interest rates continue to constrain housing and other interest-rate-sensitive markets. Manufacturing activity is also growing near its long-run trend amid continued trade and tariff uncertainty.
- Automotive and manufacturing offer important opportunities for future plastics growth. Expanding U.S. vehicle production, new model introductions, electrification, and advanced manufacturing investments could generate additional demand, although higher borrowing costs, affordability pressures, and the evolution of trade policy may limit near-term gains.
- Domestic supply-chain and feedstock advantages strengthen the industry's competitive position. Geopolitical disruptions have highlighted the value of the U.S. plastics industry's diversified domestic supply base, while abundant and relatively competitive hydrocarbon feedstocks continue to support investment and production competitiveness.
- Growth is expected, but the employment outlook remains constrained by continued structural pressures. Real plastics shipments are projected to rise 1.2% in 2026 and 0.8% in 2027, while employment is expected to decline slightly in 2026 before improving thereafter. The outlook will depend heavily on economic growth, key end-market performance, interest rates, and a resolution of trade and tariff uncertainty.

¹ These percentages add up to more than 100%, because the 23.2% 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.







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