

The background of the slide is a photograph of a laboratory. A person wearing a white lab coat and yellow gloves is using a pipette to add liquid to a conical flask containing a purple liquid. The background is slightly blurred, showing various laboratory equipment and shelves.

Industry Analysis

Polymers & Chemicals Media Landscape 2025

How to develop a narrative for growth?

EMG:

Global industrial communications driving purposeful change

With over 30 years of experience in B2B communications, we know the plastics, chemicals, and automation sectors inside out - and we know how to reach the people who matter.

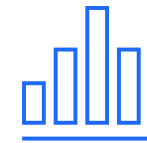
Our deep understanding of the B2B media landscape is not only backed by robust research and analytics, but also through the close relationships we have with tier 1 trade media in the industrial space.

From media relations to industry insights, we provide the tools and expertise to drive conversations, build credibility, and deliver real business results.



**GLOBAL MEDIA
RELATIONS &
CONTENT MARKETING**

**RESEARCH
ANALYSIS &
REPORTING**



**KEY MESSAGING
DEVELOPMENT**

**CRISIS
MANAGEMENT**



Beyond Innovation: Shaping the Industry Narrative



There's certainly no lack of innovation in the polymers and chemicals industry. This report demonstrates that shaping the conversation is all about leaning into what's next.

By analysing what industry leaders are saying, we've mapped out the emerging themes that signal where conversations are headed. In addition, we have identified how bringing fresh narratives into the right context further increases relevance. Innovation alone isn't enough anymore. It needs to connect to customer outcomes, regulatory shifts, sustainability and the value of partnership and cooperation.

This report offers a look under the hood of the industrial media engine. What gets picked up, what themes break through the clutter. The result is an actionable view of new angles and themes that could strengthen your positioning.

We hope it inspires you to look ahead and develop new and untapped narratives. If it sparks any ideas or questions, don't hesitate to reach out to us. We're here to help you turn insight into visibility.

Let's keep shaping what's next, together.

Richard Verbeek

Chief Executive Officer EMG

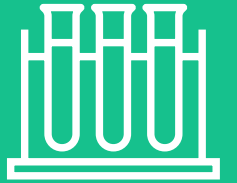


Report Background

In the fast-moving world of polymers and chemicals, we know how important it is to stay ahead of the conversation. Whether it's sustainability, innovation, regulation, or supply chain disruption, the media landscape is constantly shifting - and with it, new opportunities for strategic communication emerge.

That's why we've created this report: a focused analysis of the media space shaping our industry. We've looked at leading publications to pinpoint which themes are making headlines, where they're showing up, and what's driving their momentum.

Our goal? To help you craft smarter content strategies, fine-tune your media outreach, and stay one step ahead in a competitive landscape.



Polymers and Chemicals Media
Landscape

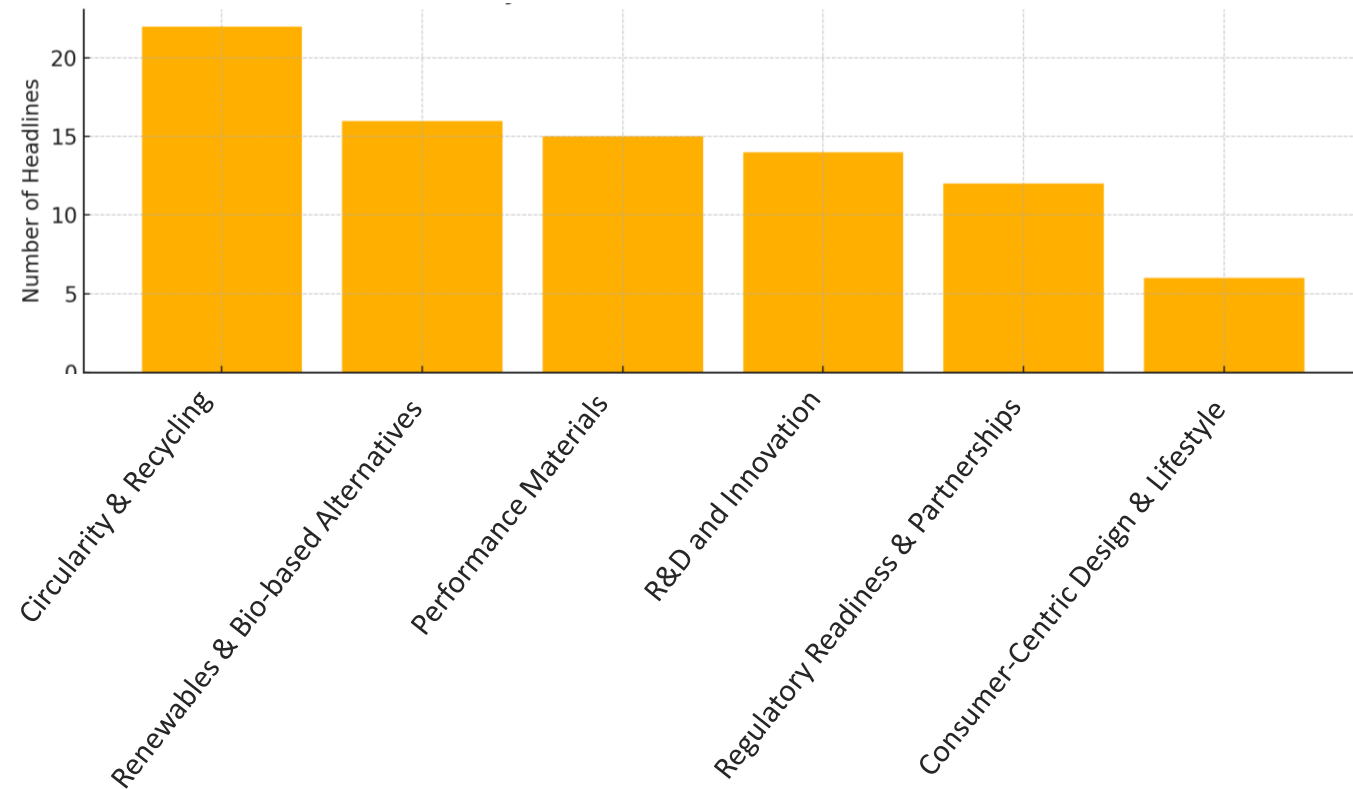
Coverage and Themes



Top Themes

When we looked at over 250 press releases, five key themes stood out. Often these themes overlap - such as partnerships in recycling, which touch on both sustainability and collaboration.

We're also seeing a fresh trend on the horizon: consumer-centric design. It's just beginning to gain momentum, and we expect it to become even more prominent.



Key themes over time

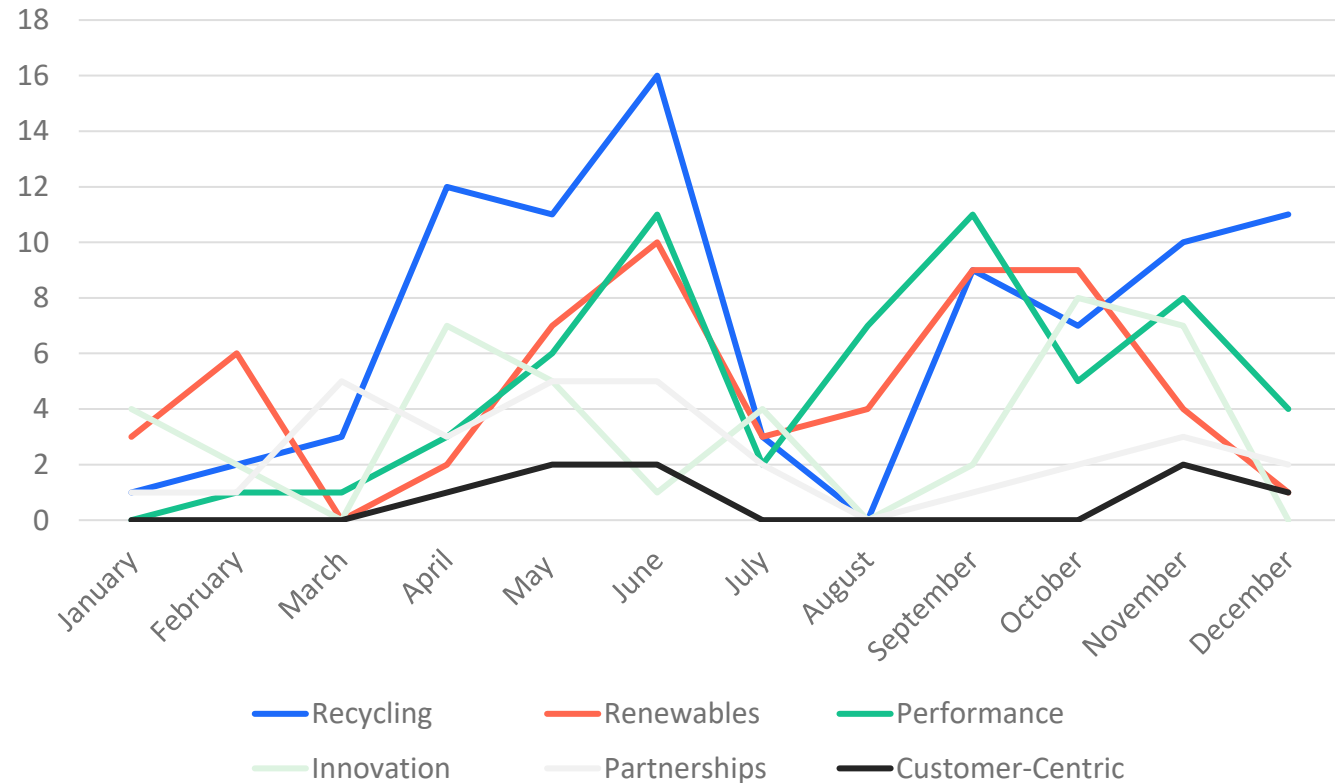
Sustainability focused themes (recycling/renewables) are ranking high.

However, we are seeing more strategic partnerships emerging to tackle challenges within the industry and strengthen supply chains.

Encina and BASF Establish Long-Term Partnership for Supply of Circular Raw Materials

Covestro, ABB partner on renewable polycarbonate for light switches, sockets

Covestro's Makrolon RE polycarbonate is being used in the manufacture of light switches, plugs, and multimedia sockets for the first time



Theme: Circularity and Recycling

This theme focuses on recycling technologies, feedstock recovery, closed-loop systems, and waste valorisation.

- **Why it matters:** Circularity is the plastics sector's top reputational challenge and innovation driver.
- **Common angle:** Focus on the problem being solved for the customer. Helping them overcome challenges.
- **Selected headlines:**
 - *"SABIC, Pashupati Group exploring recycling opportunities in India"*
 - *"Covestro and Ausell accelerate end-of-life automotive plastics recycling"*
 - *"LyondellBasell to build integrated plastic waste recycling hub in Germany"*

"We are supporting our automotive customers and addressing an increasingly prominent question discussed across the value chain."

"The automotive industry is facing increasing regulatory pressures for sustainability."

Theme: Renewables & Bio-Based Alternatives

This theme focuses on biomass-balanced polymers, chemically recycled content, and renewable raw materials.

- **Why it matters:** Plastic converters and brand owners need low-carbon alternatives to meet targets.
- **Common angle:** Focus on drive to overcome tech challenges in the past to create new alternative.
- **Selected headlines:**
 - *"BASF introduces new biomass-balanced PBAT"*
 - *"Dow launches bio-based EPDM rubber"*
 - *"Covestro inks deal to source circular raw materials from Encina"*

"In the production of PBAT, it is not possible to fully avoid the usage of fossil resources. BASF closes this gap with a solution that is organically recyclable at the end of life."

"We recognize the necessity to support our customers in their decarbonization journeys, as we drive toward our own carbon neutrality."

Theme: Performance Materials

This theme focuses on high-performance thermoplastics, lightweighting, functional additives and material durability.

- **Why it matters:** Material selection is critical in automotive, electronics, and packaging performance.
- **Common angle:** Focus on demand often within specific industries, such as automotive, etc.
- **Selected headlines:**
 - *"High-performance PPA [polyphthalamide] for next-gen IGBT [insulated-gate bipolar transistor] semiconductors"*
 - *"LyondellBasell launches new polyamide compound for automotive interiors"*
 - *"SABIC testing demonstrates potential of phase-change thermoplastics in preventing fire spread in EV (electric vehicle) batteries"*

"...is designed to meet the growing demand for high-performance, reliable electronic components for EVs, as well as high-speed trains, smart manufacturing and renewable electricity generation."

"This milestone in material innovation reflects our commitment to help craft vehicles that excel in both performance and sustainability."

Theme: R&D and Innovation

This theme focuses on compounding, additive technologies, digital design, application centres.

- **Why it matters:** Process innovation drives value for converters and OEMs looking for customisation.
- **Common angle:** Focus on investment in R&D, AI and technology simulations.
- **Selected headlines:**
 - *"Covestro invests €100M to boost global innovation centres"*
 - *"Dow showcases polymer innovations at CHINAPLAS"*
 - *"LyondellBasell expands PP compounding in China"*

"...the company is focusing on the next stage of technological evolution to become an innovation incubator for the circular economy."

"With the help of high-performance computers, chemical processes can be simulated and research processes can be implemented faster and more sustainably."

Theme: Regulatory Readiness & Partnerships

This theme focuses on traceability, ISCC PLUS certification, compliance with circular economy legislation and partnerships.

- **Why it matters:** OEMs and packaging brands need partners who help them comply and innovate.
- **Common angle:** Working together, leveraging each other's strengths to solve industry problems and why it matters to customers.
- **Selected headlines:**
 - *"Covestro secures ISCC PLUS certification"*
 - *"Dow and P&G study dissolution recycling for hard-to-recycle plastics"*
 - *"BASF, SABIC, and Linde inaugurate world's first electrically heated steam cracker"*

"We are obtaining an external certification and bridging the goal of reducing the total carbon footprint to the production, distribution and sourcing of raw materials for our products."

"Through close collaboration, teamwork, intellectual property development, and advancing the best technical solutions, the teams at SABIC, BASF and Linde have brought this project to this key stage."

Emerging: Consumer-centric Design & Lifestyle

This theme focuses on products such as wearables, sports goods, beauty packaging, health & wellness, etc.

- **Common angle:** Enriching people's daily lives in a responsible way with sustainable materials.
- **Selected headlines:**
 - *"BASF's Biopolymer Incorporated in Running Shoe Midsole"*
 - *"LyondellBasell and Partners Develop Cosmetics Dispenser Using LYB's rPP"*
 - *"LyondellBasell Exhibits Polymer Solutions for Sustainable Living at CHINAPLAS 2024"*

"We are happy to contribute to new products that support a lower greenhouse gas footprint while helping improve consumer experience with product functionality, aesthetics, and lighter weight."

Polymers and Chemicals Media
Landscape

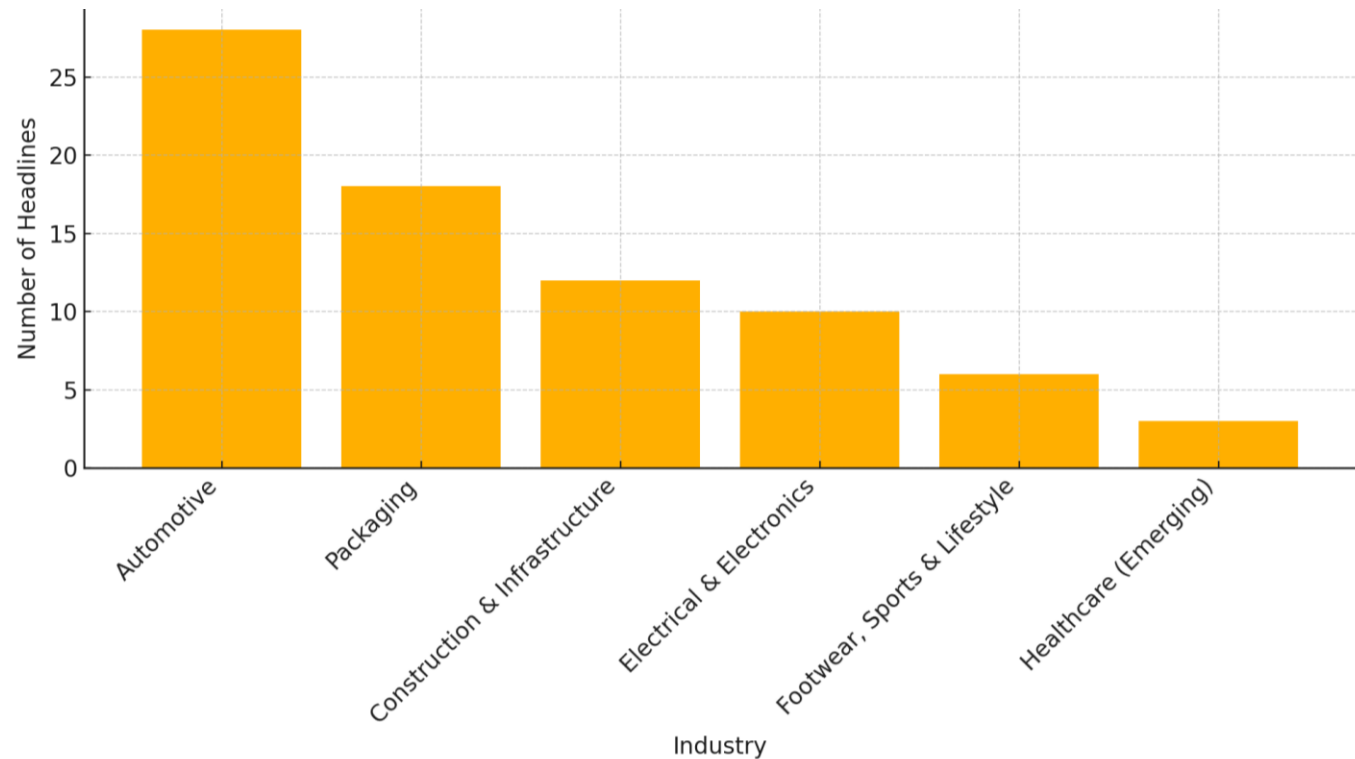
Key Industries



Top Industries

Automotive is taking the spotlight once again, with a strong focus on innovation, recycled parts, and alternative materials. As the EV (electric vehicle) market keeps growing, so does the demand for advanced materials to support it.

At the same time, we're seeing new conversations take shape around consumer goods and healthcare. Polymer companies are actively exploring more sustainable solutions for these sectors, and it's clear these topics will gain momentum going forward.



Industry: Automotive

This is by far the most prominent sector and dominating across many of the themes.

Takeaway:

Automotive is the proving ground for circularity, advanced materials, and brand innovation.

Insights and focus areas:

- Lightweighting for EVs (electric vehicles)
- Recycled plastics in interior parts
- Seat foams, under-the-hood, and electronic components
- Closed-loop recycling and car-to-car material systems are frequently spotlighted.

Selected headlines:

- *"Covestro and Ausell to accelerate end-of-life automotive plastics recycling"*
- *"Dow Signs MoU with Delian Group to Expand Use of PCR Resins in Automotive Market"*
- *"LyondellBasell Launches Polyamide-based Product Line for Automotive Interiors"*
- *"Covestro, Neste and Borealis to upcycle discarded tires into automotive parts"*

Industry: Packaging

Packaging is a core arena for circular plastics, bioplastics and PCR Resins.

Takeaway:

Packaging communications emphasise performance + compliance + sustainability.

Insights and focus areas:

- High activity around post-consumer recycled (PCR) resins, bioplastics, and film recycling.
- Increase in mentions on rigid and flexible packaging, especially for consumer goods and food contact materials.
- Consumer-facing brands drive this trend via sustainability targets.

Selected headlines:

- *"Dow Introduces Recycled Plastic Resins with up to 100% PCR Content"*
- *"LyondellBasell and Partners Develop Cosmetics Dispenser Using LYB's rPP"*
- *"Dow and P&G to Develop New Recycling Technology for Hard-to-Recycle Plastic Waste"*
- *"Certified biopolymer for industrial plant composting launched"*

Industry: Construction & Infrastructure

This area has the potential to grow. Not mentioned as often but does play a role in the companies' sustainability portfolios.

Takeaway:

There's an opportunity to elevate construction as a climate-impact sector.

Insights and focus areas:

- Lightweight, durable materials, insulation foams, and bio-circular building products.
- Messaging around durable foams, bio-circular building materials, and climate-resilient plastics.

Selected headlines:

- "Closed-loop PU (polyurethane) foam seats developed in coop with Dow, Jaguar Land Rover"
- "Collaboration with Carlisle on bio-circular building materials"
- "SABIC teams up with Iyris and Napco to create high-tech durable greenhouse roofing solution"
- "Covestro, ABB partner on renewable polycarbonate for light switches, sockets"

Industry: Electrical & Electronics (E&E)

Rising demand for high-performance engineering plastics, flame retardants, and sustainable components in devices and infrastructure.

Takeaway:

Technical wins that are essential for brand credibility in innovation.

Insights and focus areas:

- Less frequent mentions, but high-value and tech/innovation driven, focusing on performance materials and fire retardants.
- Common in relation to e-mobility, semiconductors, and appliance housings.

Selected headlines:

- *"High-Performance PPA [polyphthalamide] for Next-Generation IGBT [insulated-gate bipolar transistor] Semiconductors"*
- *"Covestro's PC-based roof sensor module for automated driving"*
- *"BASF's Biomass-balanced Polymers Used for Electrical Safety Products by Siemens"*
- *"Siemens launches circuit breaker made from BASF chemically recycled PA [polyamide], PBT [polybutylene terephthalate]"*

Industry: Footwear, Sports & Lifestyle (Consumer Goods)

Companies are pushing sustainable innovations into lifestyle sectors.

Takeaway:

This space is still emerging as chemical companies start to humanise their brand (expand beyond industrial uses) and connect with end-users.

Insights and focus areas:

- Mentions of sportswear, footwear, beauty packaging, and home goods show a push into sustainability storytelling for lifestyle sectors.
- Bioplastics, TPUs (thermoplastic polyurethane), and recyclates featured here.

Selected headlines:

- *"Running shoes are becoming more sustainable"*
- *"BASF's Biopolymer Incorporated in Running Shoe Midsole"*
- *"Ether-Based TPUs for Broad Range of Industry Applications"*
- *"Collaboration with Napco and Fonte for bread packaging"*

Industry: Healthcare/Medical Applications

This is still a niche focus, but worth keeping an eye on as regulatory-compliant sustainable materials grow in this sector.

Takeaway:

Companies could explore more messaging around clean materials, medical safety, and compliance plastics.

Insights and focus areas:

- Very few headlines address medical applications.
- Could be due to regulatory complexity - but it's a missed opportunity.

Selected headlines:

- *"Fit for Purpose: plastics for medical applications"*

Conclusion

Top 4 Takeaways for Better Media Impact



#1: Lead with Real-World Applications

	Angle	Why	What works	What doesn't:
1	Lead with Real-World Applications - Not Just Product Claims	<ul style="list-style-type: none">• Media outlets and industry press prioritise stories that solve problems or show real-world value.• Instead of saying: "We developed a new polymer," Say: "Our recycled polymer is now used in Renault's new EV [electric vehicle] interior."• Tie your innovation directly to industries such as automotive, packaging, electronics, etc.	Case studies, OEM collabs, commercial wins	Vague "innovation" announcements with no customer tie-in

#2: Circularity = Visibility

	Angle	Why	What works	What doesn't:
2	Circularity = Visibility	<ul style="list-style-type: none">• Stories about plastics recycling, circular feedstocks, and closed-loop systems dominate headlines - and align with editorial demand.• Even niche or early-stage circularity efforts get coverage if they show scale, ambition, or partnership.	Advanced recycling, car-to-car plastics, mass balance, ISCC+	General sustainability claims without proof points or metrics

#3: Partnerships Make Headlines

	Angle	Why	What works	What doesn't:
3	Partnerships Make Headlines	<ul style="list-style-type: none">• Media and customers love collaborations because they show market traction and trust.• Joint announcements with brands, recyclers, digital players (e.g., Alibaba Cloud, P&G, SCGC) make stories more credible and interesting.	MoUs, pilot projects, multi-partner initiatives	Announcements that focus only on your own capabilities

#4: Take Advantage of Underdog Industries

	Angle	Why	What works	What doesn't:
4	Take Advantage of Underdog Industries	<ul style="list-style-type: none">• Automotive and packaging are crowded. But construction, electronics, and lifestyle segments offer space to stand out.• Editors want fresh angles - e.g., bio-circular building materials or TPUs (thermoplastic polyurethane) in running shoes.	A fresh application angle in a less-talked-about sector	Yet another generic automotive compounding release

Let us help you maximise your reach

At EMG, we turn insights into impact by helping you craft a compelling, strategic narrative. Here's how we help you develop your messaging:

- **Discovery Workshops:** Deep-dive sessions to uncover your unique positioning and value propositions.
- **Audience & Market Analysis:** Identifying key trends, opportunities, and messaging angles.
- **Messaging Frameworks:** Building clear, consistent storylines aligned to your business goals.
- **Content Strategy:** Translating narratives into impactful articles, releases, and campaigns.
- **Integrated Communication:** Ensuring message consistency across media, social, and internal channels.
- **Ongoing Refinement:** Continuously optimizing messaging based on market feedback and performance.

Let's take your communications strategy to the next level together.



Executive Summary of the trends report

Real attention always needs to be earned. This report demonstrates that companies gaining traction aren't just announcing products. They're telling stories with scale, specificity, and strategic alignment.

The report also reveals a shift in what earns attention. Innovation, on its own, is no longer enough. These stories need context. Narratives need to connect advancements to customer needs, regulatory realities, or measurable outcomes. Proof matters more than promise.

Visibility is shifting from volume to value. Fewer, better-targeted communications aligned with audience expectations now outperform high-frequency output. Companies that embrace this approach are building more trust, influence, and long-term brand equity.

In other words, communication is more strategic for growth than ever. The key is for companies to position themselves within broader themes that the market already cares about.

Let's Innovate Together



RICHARD VERBEEK

+31 6 45 80 28 77

rverbeek@emg-marcom.com



NANCY VAN HEESEWIJK

+31 6 53 13 55 48

nvanheesewijk@emg-marcom.com



Scope & Methodology



Scope: Full year 2024

KEY PUBLICATIONS: 10 key trade media publications read in EMEA, publishing in English

- Chemical Weekly – India
- Compounding World - UK
- Injection World - UK
- MacPlas/MacPlas International – Italy
- Omnexus – France
- Plasteurope - Germany
- Plastics Insights – Germany
- Plastics News – USA
- Plastics Technology - USA
- Sustainable Plastics - UK

Methodology



Research was conducted through manual desk research, focusing on press releases distributed by the top 6 plastics and polymer producers throughout 2024. The process involved:

1. Press release collection
2. Media monitoring including publishing, rewriting or quotes from the various companies.
3. Coverage analysis looking at frequency, prominence and reach.



Measurement Metrics

To assess **press release performance** and **PR effectiveness**, the following key metrics were used:

1. **Total Media Mentions** – The number of times a press release was published or referenced in the 10 key trade publications.
2. **Share of Voice (SOV)** – The percentage of media coverage for each of the companies in the selected publications.
3. **Media Presence by Outlet** – Identifies which trade media covered each company.
4. **Publication Type & Quality** – Differentiates between different releases such as partnership, event, NPI (new product introduction) etc.