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Oliver Kutsch, CEO

Our studies - Your benefits

• Gain new customers
  Our studies show who are potential new customers and where you can find them

• Locate new procurement markets
  Recognize better or alternative sources of supply

• Improve your understanding of your competitors
  Who exactly are your competitors - and what are their strengths and weaknesses

• Obtain a more detailed picture of your segment
  Learn which time is the best for entering or leaving a market

• Have a look at the future
  Find out if new investments and technologies are worthwhile and how to gain access to future markets. We also show possible market scenarios

• Recognize opportunities and risks
  Identify opportunities and risks on your target markets in time

This study is useful for:

• Producers and traders of cans, tubes, caps and closures as well as trays, capsules, bottles, buckets, boxes, barrels, canisters, hobbocks, IBC’s and other metal packaging

• Suppliers of raw material like aluminium or tinplate, lacquers, plastic coating as well as producers of machines and filling, sealing or printing systems in the packaging sector

• Producers and bottlers of limonades, energy drinks, sports drinks, water, fruit juices, beer, wine, spirit drinks, food preserves, animal nutrition, cosmetics, aerosols and personal care products, household chemicals, paints and lacquers

• Executive board, production, strategic planning, R&D, market research, marketing, sales, distribution, and procurement

In this brochure you find information on the Market Study Rigid Metal Packaging - Europe:

• An introduction on page 3
• A summary of the table of contents on page 4
• In the following, there are example pages from the study
• Please use the form on the last page to easily order your copy or a free reading sample!

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The present study examines the European market for rigid and semi-rigid metal packaging (including secondary packaging and transport packaging). Types of packaging such as cans, tubes, other containers (bowls, boxes, cartons, bottles, trays, canisters, hobbocks, buckets, barrels, IBC’s etc.) are analyzed as well as metal caps and closures. In addition, the study provides information on the development of the markets of those packaging types, split by its respective application areas (soft drinks, alcoholic beverages, food products including animal nutrition, cosmetics, pharma, household chemicals, industry & transport as well as other applications). Ceresana’s analysts expect the European market volume for rigid metal packaging to account for 284 billion units in 2021.

**Energy drinks provide wings for the can market**

Within the last years, the consumption of metal cans for the bottling of soft drinks significantly increased Europe-wide by 4% p.a. In particular the increasing popularity of energy drinks and the introduction of new products, as well as price and recyclability of cans led to this development. The growth in can consumption for beer bottling can be explained by beer mixed drinks that become increasingly popular. According to the forecasts for the future, the beer packaging market appears to experience a shift away from refillable glass bottles to cans. Moreover, the current economic situation in Europe causes consumers to drink less in bars and restaurants but buy more drinks in supermarkets and drink them at home. To a certain level, this phenomenon supports the packaging type metal can.

**Preserves, fresh or frozen - a matter of budget?**

Since 2008, canned foods have gained popularity in some countries, due to the economic distortion. Its comparatively inexpensive price and the simple and energy-saving storage are properties that are appreciated anew by many consumers. Thus within the last years, the consumption of cans for food filling increased by more than 1 billion units in Europe. Nevertheless there is a tendency that in more and more countries, preferences shift from canned food to fresh or frozen products that are considered to be healthier. Even though the adapted consumption patterns from difficult economic times will presumably last for a few more years, we expect a decreasing can consumption in countries in which the disposable income decreased within the last years.

**Demographic change supports market for aluminium tubes**

Plastic tubes and other plastic containers become increasingly significant as packaging for food like sauces, dressings and condiments. Due to their positive properties, aluminium tubes still hold a strong position in the pharmaceutical field. Thanks to their excellent barrier properties, aluminium tubes protect contents from air and light. Additionally, they hold back volatile components. Aluminium tubes are also resistant to heat. This is crucial to keep pharmaceutical content sterile. Over the next years, the further expansion of Eastern European health systems will continue to support the aluminium tubes market in the field of pharmaceutical products. Also in many other Western European countries, the ageing of the population will cause a growing demand of pharmaceutical products. This is also a benefit for the aluminium tubes market. In particular analgesic ointments will stimulate consumption of aluminium tubes in many countries, due to an increase of age-related complaints such as rheumatism or other joint disorders.

**Aluminium wine closures raise their market share**

Particularly in the beverages segment, glass packaging has become less significant. This development became also apparent with regard to metal closures. In the field of soft drinks, no increase is to be expected. By contrast, the prospects in the wine segment or in the field of cosmetics & pharma are significantly more positive. For a long time, cork wine closures did not have any serious competition. Little by little, more plastic closures were used. The current most dynamic development is generated by aluminium screw caps. Besides many other positive properties, they offer high usability as no other aids are required in order to open the bottle. In addition to that, the bottle can easily be closed again.

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3.14 Slovakia (1)
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1.14.1 Demand

The demand of rigid metal packaging amounted to X billion units in 2013. Compared to 2005, this corresponds to an average decline of X% per year.

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<td>X% p.a.</td>
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</table>

Table: Demand of rigid metal packaging in Austria from 2005 to 2021 - split by types of packaging

1.14.1.1 Demand - Cans

In 2013, the Austrian production of rigid metal packaging amounted to nearly X billion units in 2013. Compared to 2005, this corresponds to an average decline of X% per year.

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<td>Aerosols - Household</td>
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<tr>
<td>Aerosols - Others</td>
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<td>Total</td>
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<td>X% p.a.</td>
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</table>

Table: Demand of metal cans in Austria - split by applications

2.2.2 Tubes - Food

In 2013, the European demand of metal tubes for food packaging amounted to approx. X billion units. Since 2005, the market increased by approx. X% p.a. The largest markets are Italy, France and Germany.

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<td>X% p.a.</td>
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Table: European consumption of metal tubes in the food segment from 2005 to 2021 - split by major countries

Consumption of carbonated soft drinks in Austria is projected to decline during the next eight years. The trend to consume beverages perceived as healthier continues. In Austria, a strong growth of the market for sports drinks and energy drinks was observed within the last years. We expect the domestic demand for sports drinks and energy drinks to increase in the future. However, the increase will presumably be slower. The bottling quantity of soft drinks in Austria can significantly increase, due to the expansion of Rexam’s Wall-to-Wall-plant in Ludesch that can directly produce for Red Bull bottler Rauch.

1.14.1.3 Demand - Other containers

The amount of other metal containers that has been consumed in Austria, amounted to approx. X million units in 2013. With a quantity of X million units, most containers were consumed in the segment of food packaging. In the field of industry and transport, there was a demand of X million units.

2.4 Caps & Closures

The European-wide demand for metal caps and closures amounted to X billion units in 2013. This corresponds to an average increase of X% p.a. to approx. X billion units in 2021.

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<td>Food</td>
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Table: Demand of each packaging type for 23 countries split by respective applications:

- Soft drinks
- Alcoholic beverages
- Food
- Aerosols (divided into personal care, household chemicals, others)
- Cosmetics & Pharma
- Industry & Transport
- Other applications

Graph: European consumption of metal caps and closures - split by applications from 2005 to 2021

All metal caps and closures of aluminium and tinplate that are used for the packaging of soft drinks and alcoholic beverages as well as for food packaging and other products belong to the category of caps and closures. Ring-pull closures and ends that serve as opening mechanisms for beverage cans or food cans will not be taken into consideration in this study.

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Adhesives - Europe
Adhesives - World
Antioxidants - World
Automotive Coatings - World
Automotive Plastics - World
Bags & Sacks - Europe
Bags & Sacks - World
Biocides - World
Bioplastics - World
Bitumen - Europe
Butadiene - World
Butadiene Rubber (BR) - World
Caps & Closures - Europe
Carbon Black - World
Catalysts - World
Chelating Agents - World
Composites (CFRP & GFRP) - World
Construction Plastics - World
Corrugated/Solid Board/Carton - Europe
Engineering Plastics - World
Ethylene - World
Expandable Polystyrene - World
Fillers - Europe
Fillers - World
Flame Retardants - World
Flexible Packaging - Europe
Food Packaging - Europe
Hydrofluoric Acid & Fluorochem. - World
Insulation Material - Europe
Insulation Material - World
Labels - Europe
Masterbatches - World
Paints & Varnishes - Europe
Paints & Varnishes - World
Pigments - World
Pipes - Europe
Plastic Additives - World
Plastic Bottles - Europe
Plastic Caps & Closures - Europe
Plastic Caps & Closures - World
Plastic Containers - Europe
Plastic Extrusion - World
Plastic Films - Europe
Plastic Films - World
Plastic Injection - World
Plastic Pipes - Europe
Plastic Pipes - World
Plastic Windows - World
Plasticizers - World
Plastics - Europe
Plastics - World
Polyamide (PA6 & PA66) - World
Polyethylene (HDPE) - World
Polyethylene (LDPE) - World
Polyethylene (LLDPE) - World
Polyethylene (PE) Pipes - World
Polypropylene - World
Polystyrene - World
Polystyrene & Expandable PS - World
Polyurethanes & Isocyanates - World
Polyvinyl Chloride (PVC) - World
Printing Inks - Europe
Printing Inks - World
Propylene - World
PUR - Adhesives & Sealants - World
PUR - Paints & Coatings - World
PVC Pipes - World
Rigid Metal Packaging - Europe
Rigid Plastic Packaging - World
Silicones - World
Solvents - World
Stabilizers - World
Styrene - World
Styrene-Butadiene Rubber (SBR) - World
Surfactants - World
Synthetic Rubber - World
Thermoplastic Elastomers - World
Titanium Dioxide - World
Windows & Doors - Europe