

Market Study: Flexible Packaging



Europe Report (2nd edition)

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This brochure provides further information on the study “Flexible Packaging - Europe (2nd edition)”

Table of Contents (1/2)

1 Market Data: Europe

- 1.1 Demand
- 1.2 Packaging Types
 - 1.2.1 Packaging films - plastics
 - 1.2.2 Bags and sacks - plastics
 - 1.2.3 Shrink and stretch films - plastics
 - 1.2.4 Labels - paper
 - 1.2.5 Bags and sacks - paper
 - 1.2.6 Other packaging - paper
 - 1.2.7 Foil - aluminum
- 1.3 Materials
 - 1.3.1 Polyethylene
 - 1.3.2 Polypropylene
 - 1.3.3 Polyethylene terephthalate (PET)
 - 1.3.4 Polyvinyl chloride
 - 1.3.5 Other plastics
 - 1.3.6 Plastics - Total
 - 1.3.7 Paper - Total
 - 1.3.8 Aluminum - Total
- 1.4 Applications
 - 1.4.1 Food and beverages
 - 1.4.2 Consumer non-food
 - 1.4.3 Heavy-duty and transport
 - 1.4.4 Carrier bags

2 Market Data: Countries

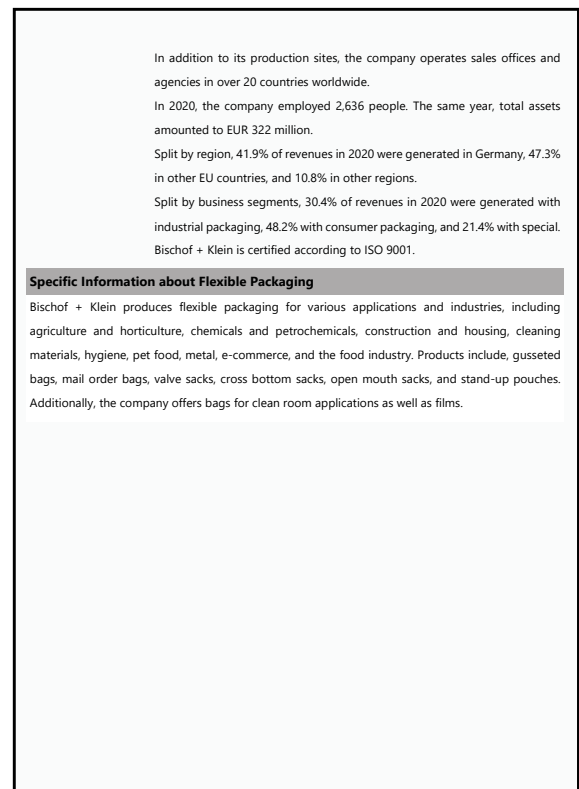
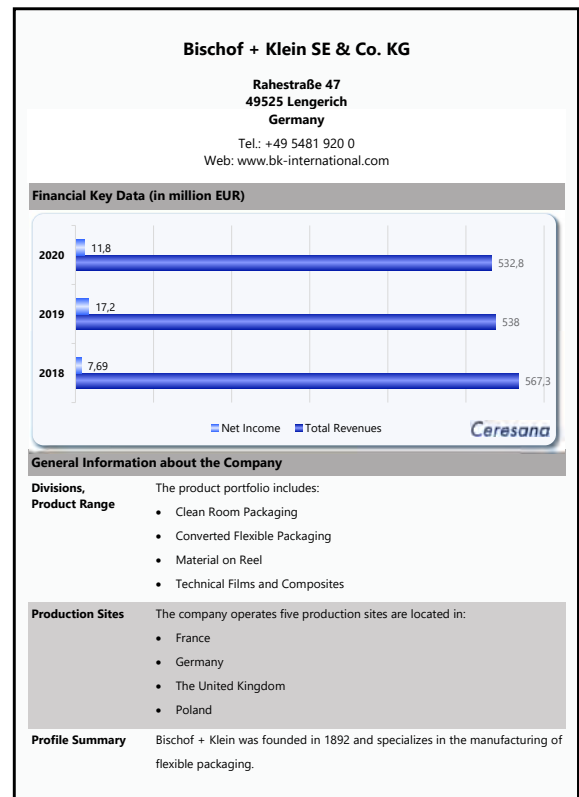
(For each country: demand per materials, packaging types, and applications)

- 2.1 Austria
- 2.2 Belgium
- 2.3 Czechia
- 2.4 Finland
- 2.5 France
- 2.6 Germany
- 2.7 Greece
- 2.8 Hungary
- 2.9 Italy
- 2.10 Norway
- 2.11 Poland
- 2.12 Portugal
- 2.13 Romania
- 2.14 Russia
- 2.15 Spain
- 2.16 Sweden
- 2.17 The Netherlands
- 2.18 Turkey
- 2.19 United Kingdom
- 2.20 Other Europe

Table of Contents (2/2)

3 Company Profiles*

- Austria (3 Producers)
- Belgium (2)
- Croatia (1)
- Czechia (2)
- Denmark (1)
- Finland (4)
- France (1)
- Germany (18)
- Greece (1)
- Hungary (1)
- Italy (11)
- Lithuania (1)
- Luxembourg (2)
- Poland (3)
- Spain (3)
- Sweden (2)
- Switzerland (6)
- The Netherlands (1)
- Turkey (2)
- Ukraine (1)
- United Kingdom (10)



*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

Market Study: "Flexible Packaging - Europe (2nd edition)"

19 Countries, 76 Producers, 250 Pages, 21 Graphs, 72 Tables, 11/2022

Summary

In **Chapter 1**, the demand for flexible packaging is given in tonnes for Europe as a whole, broken down into:

- Packaging films
- Bags and sacks
- Shrink and stretch films
- Labels
- Other packaging.

While the focus is primarily on plastics, the materials aluminum and paper are also taken into account.

Chapter 2 provides an in-depth examination of the various types of flexible packaging made of plastic and paper: data on the development of demand for packaging films, bags and sacks, shrink and stretch films, labels and other packaging, each broken down for 19 national markets in Europe.

Demand in the various countries is broken down by packaging materials:

- Polyethylene
- Polypropylene
- Polyethylene terephthalate (PET)
- Polyvinyl chloride (PVC)
- Other plastics
- Paper
- Aluminum.

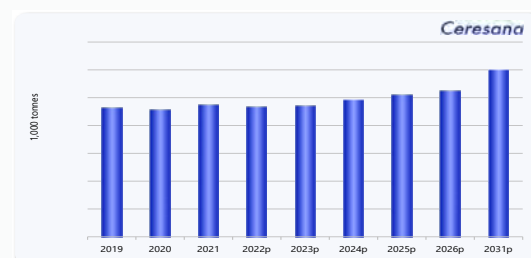
In addition, the market analysis sheds light on the application areas: The areas "food and beverages," "consumer non-food," "heavy-duty and transport," and "carrier bags" are examined for the eight largest markets (Germany, France, the United Kingdom, Italy, Poland, Russia, Spain, and Turkey) as well as for the aggregate of other European countries.

Chapter 3 provides 76 company profiles of the most important manufacturers, clearly arranged according to contact details, revenues, profit, product range, production sites, brief profile as well as product types and applications. Detailed profiles are provided, such as alesco, Bemis, Graphic Packaging, Leipa, Mitsubishi Polyester, Papier-Mettler, Polifilm, RKW, Sappi, Südpack, Taghleef, and Treofan Group.

2.11 Poland

Demand – Types of Packaging

Total demand of flexible packaging in Poland reached approx. X tonnes in 2021. By 2031, we expect demand to increase by X% p.a. to around X million tonnes.



Graph: Demand in Poland from 2019 to 2031

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031
Plastics - packaging films	X	X	X	X	X	X	X	X	X	X % p.a.
Plastics - Bags & Sacks	X	X	X	X	X	X	X	X	X	X % p.a.
Plastics - Shrink & Stretch	X	X	X	X	X	X	X	X	X	X % p.a.
Plastics - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Paper - Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Paper - Bags & Sacks	X	X	X	X	X	X	X	X	X	X % p.a.
Paper - Other Packaging	X	X	X	X	X	X	X	X	X	X % p.a.
Paper - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Aluminum - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Poland from 2019 to 2031 – split types of packaging

Demand - Materials

Demand for flexible packaging amounted to X tonnes in 2021, of which PE packaging accounted for X tonnes. We expect the highest growth rates up to 2031 for products made of PET and PP, at X% and X% p.a. respectively.

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031
PE	X	X	X	X	X	X	X	X	X	X % p.a.
PP	X	X	X	X	X	X	X	X	X	X % p.a.
PET	X	X	X	X	X	X	X	X	X	X % p.a.
PVC	X	X	X	X	X	X	X	X	X	X % p.a.
Other Plastics	X	X	X	X	X	X	X	X	X	X % p.a.
Plastics - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Paper - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Aluminum - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Poland from 2019 to 2031 – split by materials

Demand - Applications

The "Food & Beverages" sector accounted for over half of the Polish demand for flexible packaging in 2021. This sector will develop most dynamically in the next ten years at X% p.a.

in 1,000 tonnes	2019	2020	2021	2022p	2023p	2024p	2025p	2026p	2031p	2021-2031
Food & Beverages	X	X	X	X	X	X	X	X	X	X % p.a.
Consumer Non-Food	X	X	X	X	X	X	X	X	X	X % p.a.
Heavy Duty & Transport	X	X	X	X	X	X	X	X	X	X % p.a.
Carrier Bags	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Poland from 2019 to 2031 – split by applications

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[Bags & Sacks - Europe](#)

[Bags & Sacks - World](#)

[Bioplastics - World](#)

[Carbon Black - World](#)

[Catalysts - World](#)

[Chelating Agents - World](#)

[Composites \(CFRP & GFRP\) - World](#)

[Engineering Plastics - World](#)

[Expandable Polystyrene - World](#)

[Fillers - Europe](#)

[Fillers - World](#)

[Flame Retardants - World](#)

[Flexible Packaging - Europe](#)

[Food Packaging - Europe](#)

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[Pigments - World](#)

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[Plastic Caps & Closures - World](#)

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[Plastic Extrusion - World](#)

[Plastic Films - Europe](#)

[Plastic Films - World](#)

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[Plastic Pipes - World](#)

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[Polyethylene \(LDPE\) - World](#)

[Polyethylene \(LLDPE\) - World](#)

[Polypropylene - World](#)

[Polystyrene & Expandable PS - World](#)

[Polyurethanes & Isocyanates - World](#)

[Polyvinyl Chloride \(PVC\) - World](#)

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[Printing Inks - World](#)

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[Solvents - World](#)

[Stabilizers - World](#)

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