Market Study: Plastic Films - World (2nd edition)
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Yours faithfully, Oliver Kutsch

This study is useful for:

- Manufacturers and distributors of plastics as well as of films made of LDPE, LLDPE, HDPE, BOPP, Cast PP, BOPET, PVC, EVOH, PS, PA, etc.
- Producers of bags, sacks, packaging for food, consumer and industrial goods, shrink and stretch films, agricultural films, construction films etc.
- Manufacturers of auxiliaries and additives such as pigments, fillers, and plasticizers, engineering companies
- Associations, institutes, investors, and consultancies
- Executive board, finance, strategic planning, corporate development, R&D, market research, marketing, sales and distribution, procurement

In this brochure you will find the following information:

- An introduction on page 3
- A summary of the table of contents on page 4
- Following this, there are example pages from the study
- Please use the form on the last page to easily order your study or a free reading sample!
Handy packaging that is microwaveable; packaging that is visually appealing, presents the content well, helps to increase the durability, and contains the intensity of flavor over a long period of time; packaging that is light but also easy to handle: These characteristics already belong to the everyday life of consumers. Accordingly, the pressure on producers of films to meet the continuously rising requirements regarding optics, handling and barrier properties, as well as conservation of resources and sustainability is high. Requirements also increase for bags and sacks, shrink and stretch films, and agricultural films. But the efforts are worth it: Sales of packaging films will reach USD 250 billion until 2024.

Ceresana analyzed the global market for flexible plastic films of all kinds already for the second time. In defining films, sheets, and boards, all products from wafer-thin films to thick, rigid boards can be found. The focus in the present study is on flexible films. These include, for example, packaging for foodstuffs but also for non-food products such as textiles, stationary, and industrial goods. Additional analyses are provided of the applications bags / sacks and shrink / stretch films. Besides the packaging market, other segments play a major role as well, especially agricultural films, construction films, films for office and stationary goods, technical insulation films, as well as other industrial films.

**Packaging Trends as Drivers of Growth**

Product individualization does not only occur on the level of the actual consumer goods but also to a large extent in the segment packaging (for example the campaigns for Coca Cola or Nutella). Since digital printing systems nowadays do not need any complex printing plates and become more and more efficient, completely new possibilities for packaging design arise. Requirements for the optimal use of digital printing are, however, films that are able to be printed on easily, fast, and optically of high quality. Increasingly complex packaging is especially in demand for pharmaceutical products and fresh foodstuffs. So-called Modified Atmosphere Packaging is supposed to protect the food from a fast decay and to increase the date of minimum durability with an artificially created protective atmosphere. Another segment where innovative packaging that allows for a fast and clean preparation of the meal is presented constantly is ready-made meals. Microwaveable packaging is a growing segment as well as stand-up pouches or individual packaging that offers a better dosing and durability. Since organic foodstuffs and sustainability gain evermore importance for consumers, the market for packaging that is considered as ecological is growing rapidly. Especially disposable food packaging offers potential for the usage of bio-plastics. Ceresana expects the demand for bioplastics in Europe in the segment packaging to grow by over 15% p.a. in the upcoming years. Packaging made of recycled plastics will also increase.

**BOPET and BOPP Continue to Be in Demand**

BOPET films show a high transparency, high-quality optics, and a high tensile strength - very thin and light films can be made of this material. For more reductions of thickness and weight of films, BOPET plays a major role. It helps to increase the durability of perishable food with its barrier properties and is, e.g., used for aroma-proof packaging. Thin BOPET films of 8 to 50 µm are mainly used for FMCG (fast-moving consumer goods) packaging, thicker films of up to 350 µm are rather used for stationary or electronic goods.

BOPP films are mainly utilized for food packaging. However, BOPP films are not readily heat sealable. As this is a prime requirement for packaging films, BOPP is normally given a surface coating of a heat sealable polymer such as a coextruded PP random copolymer. Copolymers for heat seals need to exhibit a high gloss and transparency. Coating or coextrusion increases the barrier properties of BOPP film, decreasing its permeability to gases. Common barrier polymers are ethylene vinyl alcohol, polyvinylidene chloride, and polyamide. Hot sealable BOPP films can be used for, e.g., packaging of foodstuffs, stationary, textiles, cosmetics, and medical products. Ceresana expects an AAGR of 4.0% in the upcoming eight years for BOPP films.

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1.1.2 Revenues - World

We forecast the most dynamic development of revenues in the next eight years to occur in Asia-Pacific. At an AAGR of X% p.a. (X% for EUR values), market value in this region will rise to approx. USD X billion (EUR X billion). World market share will increase to roughly X% accordingly. North America is expected to continue to register the second highest revenues in 2024. Recording revenues of about USD X billion (EUR X billion), this region will reach a market share of X%, followed by Western Europe that will generate USD X billion (EUR X billion) and hold X% of shares. The fourth largest revenues of approx. USD X billion (EUR X billion), corresponding to a market share of roughly X%, will be reached in South America. The Middle East will presumably generate revenues of USD X billion in 2024 (EUR X billion). For Eastern Europe we expect a market value of USD X billion (EUR X billion) and for Africa revenues of USD X billion (EUR X billion).

2.2.1 Demand, Revenues, and Production - Poland

The segment bags and sacks was the prime sales market in Poland in 2016. We forecast the highest growth rate of X% p.a. in the next eight years for the segment other films. Demand for packaging films will also increase considerably.

### Table: Demand for plastic films in Poland from 2008 to 2024 – split by applications

<table>
<thead>
<tr>
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Table: Demand for plastic films in Poland from 2008 to 2024 – split by applications

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Chapter 1: Extensive market data on for 7 regions and the world from 2008 to 2024:
- Demand
- Revenues
- Production

Chapter 2: Specific analyses and forecasts for 18 countries:
- Demand per product type (PE, PP, PET, PVC, others)
- Production per product type (LDPE, LLDPE, HDPE, PP, PET, PVC, others)
- Demand split by individual application areas
- Import and export
- Revenues

Graph: Global revenues generated with plastic films from 2008 to 2024 in billion USD – split by regions

Graph: Production of plastic films in Poland from 2008 to 2024

Table: Demand for plastic films in Poland from 2008 to 2024 – split by types of plastics

Table: Production of plastic films in Poland from 2008 to 2024 – split by types of plastics

Over X tonnes of plastic films were produced in 2016. For the year 2024, we forecast a production volume of approx. X tonnes. This corresponds to an increase of, on average, X % p.a. when compared to 2016.
3.1.3 Applications - Packaging Films

In 2016, X million tonnes of plastic films were used for the sales market packaging films worldwide. Thus, demand for plastic films in this application area rose at an average rate of X% p.a. since 2008. Given an expected X% p.a. increase, global demand for plastic films used in this segment will continue to profit from their good properties and gain additional market shares. Packagers and consumers alike value the high clarity in particular, which contributes to the high-quality optical appearance of BOPET packaging. As BOPET films also offer a very high puncture resistance, they can be used to produce very thin and yet highly robust packaging products. Other positive properties are high dimensional stability in a broad range of temperatures, low water absorption, low oxygen permeability, and high tensile strength. The properties of BOPET films can be further improved by adding specific additives or by coating (e.g. aluminum sputters). Thus, BOPET are also highly suitable as aroma barrier for food packaging. Bags made from PET are, amongst others, used as packaging for household chemicals, e.g. detergents. Especially pouch packaging such as disposable sachets or stand-up pouches belong to the driving force on the market. The market for bioplastics is rapidly growing. Packaging solutions - especially disposable food packaging - will have a great potential for the usage of bioplastics. In Europe, the demand for bioplastics in the packaging industry is expected to increase by more than 15% p.a. over the next years. As the term sustainability is clearly gaining in importance for evermore consumers, the demand volume of packaging solutions that are considered to be environmentally friendly will experience strong growth rates. This also includes packaging solutions made of recycled plastics. The growing [...]
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- 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
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- Insulation Material - World
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- Masterbatches - World
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- 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
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- Plasticizers - World
- Plastics - Europe
- Polyamide (PA6 & PA66) - World
- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
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