Market Study: Food Packaging - Europe

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Nowadays, information is available at the push of a button, always, and in overwhelming amounts. But what is the best way to find the crucial data amongst all that information? That is why several thousand companies use the knowledge of our employees. Based on their extensive experience, they provide decisive data for the benefit of their customers. The clearly arranged and practice-oriented studies of Ceresana offer precise analyses and well-founded forecasts - also for your markets!

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Yours faithfully, Oliver Kutsch

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- **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 packaging film, bags and sacks, stand-up pouches, shrink and stretch films, plastic containers, caps and closures, labels, wrapping papers, corrugated board, solid board and cardboard packaging, cans, tubes, aluminum film or container glass
- Suppliers of raw materials including polyethylene, polypropylene, PET, PVC, paper, corrugated board, solid board, tinplate, aluminum, and container glass as well as additives such as antioxidants or stabilizers
- Producers and traders of food, bottlers and packers as well as the sector packaging printing
- Executive board, strategic planning, business development, R&D, technology, market research, marketing, sales and distribution, and 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 copy or a free reading sample!

The study examines the European market for food packaging. Beverages are not considered. The analysis includes packaging made of plastics, paper and cardboard (including corrugated board), metal and glass. The demand for food packaging will be analyzed for 12 applications (Bakery and Pastry, Ready-Made Meals, Fresh Fruits and Vegetables, Chilled and Frozen Food, etc.) and 16 types of packaging (such as films, bags, cans, caps and closures). The market for plastic food packaging for the 8 countries with the largest sales volume will be divided into individual types of plastic (polyethylene, polypropylene, PET, and other plastics). The study also considers secondary and transport packaging which is used as the outer packaging and for transporting food. Ceresana expects the European market for food packaging to reach a volume of 38.2 million tonnes in 2022.

Complex Trends Determine the Market

The market for food packaging is determined by a large variety of trends. Materials are replaced by others, for example metal by plastics. In the Plastics segment, individual types of plastics are gaining in importance at the expense of others. At the same time, new and innovative types of packaging and technologies are developed, such as stand-up pouches, modified atmosphere packaging, intelligent packaging, high barrier film, shelf-ready packaging. Dynamics in individual applications vary depending on the sector and country and are influenced by regulations and consumer trends. The consumer behavior and expectations are changing due to new technologies, an improved access to information, social trends as well as new distribution channels. All this is having an impact on the way of packaging food. Manufacturers are confronted with having to find a way of meeting all these requirements.

Increasing Amount of Packaging Made of Bioplastics

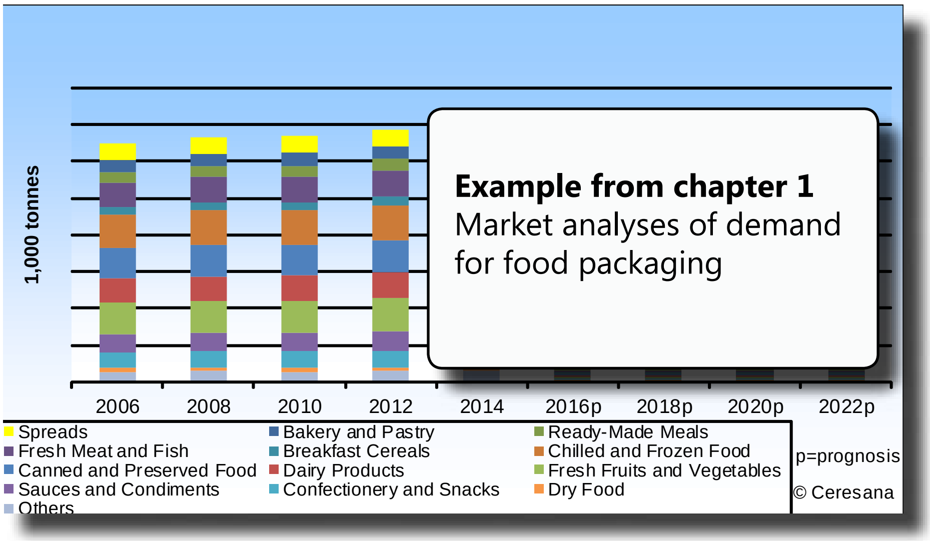
The market for bioplastics is rapidly growing. Packaging solutions, especially single-use food packaging, will have a great potential for the usage of bioplastics. In Europe, the demand for bioplastics in the packaging industry is expected to increase by more than 15% p.a. As the term sustainability 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. To some degree, paper packaging can profit from this trend as well. However, sustainability alone is not enough. Glass packaging, for example, is considered to be sustainable, but its European demand will fall by more than 1% p.a. over the next years.

Smart Packaging for Smart Consumers

Consumers expect lightweight and practical packaging, a long shelf life, complete information about the packaged product and an appealing design. The industry is steadily launching new products and technologies and is on the right track to meet the requirements laid down by consumers. Stand-up pouches are used in more and more areas in order to reduce the packaging weight and resource deployment. The shelf life of food can be extended by modifying the gas composition inside the package. This method is called modified atmosphere packaging (MAP). All in all, consumers are better informed and wish to have as many details about the product as possible.

Convenience is the Key

The development of individual food segments is having an influence on the type and demand volume of packaging. Here, the domestic production volume of the particular food product is playing an important role as many of them are packaged right or shortly after they have been manufactured or harvested. The output in turn is often strongly influenced by domestic demand in the respective country. Therefore, both figures are relevant for the market analysis. Packaging demand for chilled and frozen food as well as for ready-made meals is expected to experience the highest growth rates. The reason for this is the growing orientation of consumers towards convenience food. The sales volume of packaging for canned and preserved food, however, is dropping. The dynamic of the packaging market can vary strongly in the individual food segments according to the material and type of packaging.


1,000 tonnes
2006
2008
2010
2012
2014
2016p
2018p
2020p
2022p
Spreads
Bakery and Pastry
Ready-Made Meals
Fresh Meat and Fish
Breakfast Cereals
Chilled and Frozen Food
Canned and Preserved Food
Dairy Products
Fresh Fruits and Vegetables
Sauces and Condiments
Confectionery and Snacks
Dry Food
Others
p=prognosis
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Example from chapter 1
Market analyses of demand for food packaging

1.22 Turkey - Types of Plastics

In 2014, the segment Packaging Films recorded the largest market share in the area of plastic food packaging. Here, PE and PP were the most important types of plastics accounting for X or X tonnes. The demand for rigid containers made of PP amounted to X tonnes. In the future, rigid containers made of PET will experience the most dynamic growth rate of X% p.a.

In 1.000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Packaging Films	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
PE	X	X	X	X	X	X	X	X	X	X
PP	X									
PET	X									
Others	X									
Bags and Sacks	**X**									
PE	X									
Others	X									
Shrink / Stretch Films	**X**									
PE	X									
Others	X									
Rigid Containers	**X**									
PE	X									
PP	X									
PET	X									
Others	X									
Caps & Closures	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
PE	X	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X	X
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: Demand for plastic food packaging in Turkey from 2006 to 2022 – split by type of plastic

Chapter 1: Extensive market data on Europe and 22 countries:
- Market split by 4 materials, 16 types of packaging as well as 12 applications
- Materials split individually by type of packaging and application
- Facts for the 8 largest European markets: types of packaging split by individual types of plastics

1.13.3 Norway - Paper and Cardboard (Including Corrugated Board)

1.13.3.1 Applications

In 2014, the demand for paper and cardboard food packaging amounted to X tonnes. Compared to 2006, this corresponds to an AAAGR of X%. The most important sales market in this area of packaging in 2014 was Chilled and Frozen Food. The second largest application was Fresh Meat and Fish. The area of Ready-Made Meals will experience the most dynamic growth rate of X%. For the following eight years, we expect demand for paper and cardboard food packaging to rise at a rate of X% in 2022.

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Spreads	X	X	X	X	X	X	X	X	X	X
Bakery and Pastry	X	X	X	X	X	X	X	X	X	X
Ready-Made Meals	X	X	X	X	X	X	X	X	X	X
Fresh Meat and Fish	X	X	X	X	X	X	X	X	X	X
Breakfast Cereals	X	X	X	X	X	X	X	X	X	X
Chilled and Frozen	X	X	X	X	X	X	X	X	X	X
Canned and Preserved Food	X	X	X	X	X	X	X	X	X	X
Dairy Products	X	X	X	X	X	X	X	X	X	X
Fresh Fruits and Vegetables	X	X	X	X	X	X	X	X	X	X
Sauces and Condiments	X	X	X	X	X	X	X	X	X	X
Confectionery and Snacks	X	X	X	X	X	X	X	X	X	X
Dry Food	X	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X	X
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: Demand for paper and cardboard food packaging in Norway from 2006 to 2022 - split by application

2.3 Ready-Made Meals

This category includes all types of food that are ready for consumption and only have to be heated and/or mixed with water. Instant soups belong to ready-made meals as well. Products of the conventional gastronomy do not count among this category.

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p
Belgium	X	X	X	X	X	X	X
Bulgaria	X	X	X	X	X	X	X
Germany	X	X	X	X	X	X	X
Finland	X	X	X	X	X	X	X
France	X	X	X	X	X	X	X
Greece	X	X	X	X	X	X	X
United Kingdom	X	X	X	X	X	X	X
Italy	X	X	X	X	X	X	X
Lithuania	X	X	X	X	X	X	X
The Netherlands	X	X	X	X	X	X	X
Norway	X	X	X	X	X	X	X
Austria	X	X	X	X	X	X	X
Poland	X	X	X	X	X	X	X
Portugal	X	X	X	X	X	X	X
Romania	X	X	X	X	X	X	X
Russia	X	X	X	X	X	X	X
Sweden	X	X	X	X	X	X	X
Slovakia	X	X	X	X	X	X	X
Spain	X	X	X	X	X	X	X
Czechia	X	X	X	X	X	X	X
Turkey	X	X	X	X	X	X	X
Hungary	X	X	X	X	X	X	X
Rest of Europe	X	X	X	X	X	X	X
Total	X	X	X	X	X	X	X

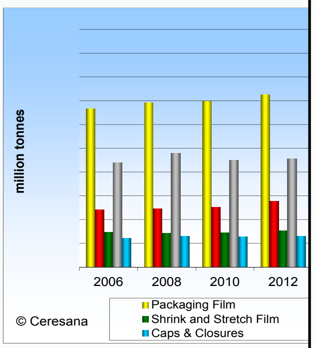
Table: European demand for food packaging in the Ready-Made Meals segment from 2006 to 2022 – split by major countries

In the area of Chilled and Frozen Food, more and more different ready-made snacks are being produced. Packaging is to be as lightweight as possible so that the food can

Chapter 2: Demand for food packaging for each of the following 12 applications, split by 22 individual countries:
- Spreads
- Bakery and Pastry
- Ready-Made Meals
- Fresh Meat and Fish
- Breakfast Cereals
- Chilled and Frozen Food
- Canned and Preserved Food
- Dairy Products
- Fresh Fruits and Vegetables
- Sauces and Condiments
- Confectionery and Snacks
- Dry Food
- Others

3.1. Plastic Food Packaging

During the past eight years, European demand for plastic food packaging rose by an average of X% per year. About X% of the European consumption volume in 2014 were used in Germany. Recording a demand volume of slightly more than X tonnes, Germany ranked first, followed by Italy and France. The highest relative increase at rates of X% p.a. between 2014 and 2022 is forecast for Russia. The least dynamic development is anticipated for Spain. In total, we expect European demand for plastic food packaging to reach a volume of about X tonnes by 2022. This constitutes an average growth rate of X% per year between 2014 and 2022.



Graph: European demand for plastic food p
of packaging

3.1.1 Packaging Film (Primary

In 2014, about X million tonnes of primary
ment in Europe. In the past eight years, dem
About X% of European demand in 2014 w
tonnes.

Chapter 3: Demand in 22 countries, split by material and individual types of packaging within the material groups:

- **Plastics**
  - Packaging Film (Primary Packaging)
  - Bags and Sacks
  - Shrink / Stretch Films
  - Rigid Containers
  - Caps & Closures
- **Paper and Cardboard** (including Corrugated Board)
  - Bags and Sacks
  - Labels
  - Other Packaging Papers
  - Corrugated Board Packaging
  - Solid Board Packaging
- **Metal**
  - Cans
  - Tubes
  - Other Containers
  - Caps & Closures
  - Film and Barrier Layers
- **Container Glass**

In 1,000 tonnes	2006	2008	2010	2012						
Belgium	X	X	X	X						
Bulgaria	X	X	X	X						
Germany	X	X	X	X						
Finland	X	X	X	X	X	X	X	X	X	X
France	X	X	X	X	X	X	X	X	X	X
Greece	X	X	X	X	X	X	X	X	X	X
United Kingdom	X	X	X	X	X	X	X	X	X	X
Italy	X	X	X	X	X	X	X	X	X	X
Lithuania	X	X	X	X	X	X	X	X	X	X
The Netherlands	X	X	X	X	X	X	X	X	X	X
Norway	X	X	X	X	X	X	X	X	X	X
Austria	X	X	X	X	X	X	X	X	X	X
Poland	X	X	X	X	X	X	X	X	X	X
Portugal	X	X	X	X	X	X	X	X	X	X
Romania	X	X	X	X	X	X	X	X	X	X
Russia	X	X	X	X	X	X	X	X	X	X
Sweden	X	X	X	X	X	X	X	X	X	X
Slovakia	X	X	X	X	X	X	X	X	X	X
Spain	X	X	X	X	X	X	X	X	X	X
Czechia	X	X	X	X	X	X	X	X	X	X
Turkey	X	X	X	X	X	X	X	X	X	X
Hungary	X	X	X	X	X	X	X	X	X	X
Rest of Europe	X	X	X	X	X	X	X	X	X	X
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: European demand for plastic packaging film in the food segment from 2006 to 2022 - split by countries

The highest relative increase in the next eight years is forecast for Russia. Market volume in this country is likely to rise by an average of X% p.a. to approx. X tonnes in 2022. Turkey and Lithuania will also experience above-average growth rates. The weakest development is anticipated for the Portuguese market. Its market volume of plastic films for primary food packaging will fall by an average of X% p.a. by 2022.

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Financial Key Data				
(in billion US$)	**2011/12**	**2012/13**	**2013/14**	**2014/15**
Total Revenues	6.35	6.35	5.93	6.06
Net Income	0.40	0.63	0.59	0.66

Financial data mentioned belongs to Sappi Ltd, 48 Ameshoff Street, Braamfontein, Johannesburg, South Africa

General Information About the Company

Divisions, Product Range: Sappi Europe is a manufacturing company for a wide range of wood pulp, paper pulp and paper-based products.

Production Sites: The company owns seven European production sites located in:
- Maastricht, The Netherlands
- Lanaken, Belgium
- Gratkorn, Austria
- Alfeld, Ehingen and Stockstadt, Germany
- Kirkniemi, Finland

Profile Summary: Sappi Europe is a division of Sappi Ltd., which was founded in 1936, and is a producer … 16 sales … tonnes o… 51% of th… and 24% … group in … ality pap… In the fis… mills in G… cording t…

Chapter 4: In-depth profiles for Europe's largest manufacturers, including Amcor, Auxiliar Conservera, Berry Plastics, Coveris, DS SMITH, Karatzis, Reynolds, Riwisa, Sealed Air, Smurfit Kappa, Sonoco, and Tetra Pak. (The profiles are assigned to the country in which the company is headquartered and include JVs and subsidiaries.)

Specific Information About Food Packaging

"Algro Finess"
- one-sided coated glossy paper
- used as a quality wrapper for confectionery, snack and food, flat bag, food, snack and sugar sachet, as well as soup pouches
- weights from 40 g/m² to 100 g/m²
- conversion process: embossing, lamination to film and foil, and PE/PVDC coating

"Algro Primess":
- intense white and high gloss paper
- weights from 40 g/m² to 100 g/m²
- used as a quality wrapper for confectionery, snack and food, flat bag, food, snack and sugar sachet, as well as soup pouches
- conversion process: embossing, lamination to film and foil and PE/PVDC coating

"Algro Baress":
- one side coated glossy paper
- weights from 80 g/m² to 140 g/m²
- end-use application: confectionery and snack wrapper, flat bag and seed bag

"Algro Nature":
- weights from 40 g/m² to 80 g/m²
- used as a quality wrapper for confectionery, snack and food, flat bag, food, snack and sugar sachet, as well as soup pouches
- conversion process: lamination, varnishing and PE extrusion
- mineral oil-based binders are replaced by vegetable-based coating ingredients

"Algro Topwhite":
- weights from 40 g/m² to 70 g/m²
- used as a quality wrapper for confectionery, snack and food, flat bag, food, snack and sugar sachet, as well as s…
- conversion proc…

Under the brand na…
- uncoated Machi…
- used as the inne…

Chapter 4: Data and facts on major producers, clearly arranged by:
- Contact details
- Turnover and profit
- Production sites
- Profile summary
- Product details

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- ☐ Toluene
- ☐ Xylene

Packaging

- ☐ Bags and Sacks - Europe
- ☐ Bags and Sacks - World
- ☐ Caps & Closures - Europe
- ☐ Corrugated & Solid Board & Carton
- ☐ Flexible Packaging - Europe
- ☐ Food Packaging - Europe
- ☐ Plastic Bottles - Europe
- ☐ Plastic Caps & Closures - Europe
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- ☐ Plastic Containers - World
- ☐ Plastic Films - World
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- ☐ Fertilizers - World
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Value Chains

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- ☐ Ethylene - USA
- ☐ Propylene - China
- ☐ Propylene - USA

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