

Market Study: Rigid Metal Packaging - Europe



Dear readers,

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!

Why you should make use of our knowledge

Our time-tested understanding of the markets helps you to even better assess potential chances, new products and technologies, but also your competitors. Use this knowledge to shape an ever more effective and efficient future for your company.

We provide you with reliable forecasts regarding products and markets. Get valuable information about global trends as well as opportunities and risks.

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

The studies of Ceresana will save you time and money and help you prevent costly wrong decisions.

We are your market experts

Ceresana is the most trusted market research company for the industrial sector. In addition to single-client studies, our clients also profit from already more than 90 multi-client market studies.

We would be pleased to assist your company in this challenging market environment!



Yours faithfully,
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

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!

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, hob-locks, 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 com-

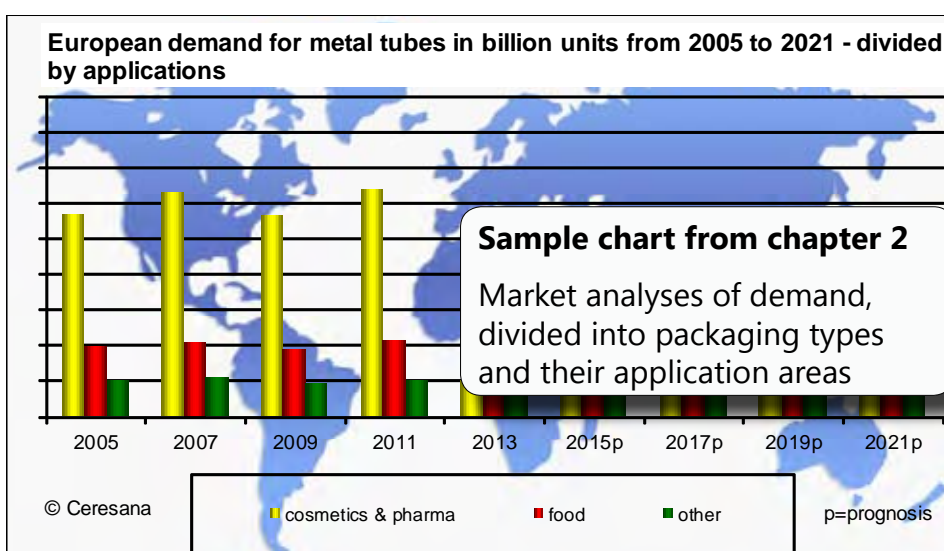
ponents. Aluminium tubes are also resistant to heat. This is crucial to keep pharmaceutical content sterile. Over the next years, the further expansion of Eastern European health systems will continue to support the aluminium tubes market in the field of pharmaceutical products. Also in many other Western 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.

1 Market Data

- 1.1 Europe
 - 1.1.1 Demand
 - 1.1.1.1 Demand - Cans
 - 1.1.1.2 Demand - Tubes
 - 1.1.1.3 Demand - Other containers
 - 1.1.1.4 Demand - Cans
 - 1.1.2 Production
- 1.2 Austria
 - 1.2.1 Demand
 - 1.2.1.1 Demand - Cans
 - 1.2.1.2 Demand - Tubes
 - 1.2.1.3 Demand - Other containers
 - 1.2.1.4 Demand - Cans
 - 1.2.2 Production & Trade
- 1.3 Belgium
 - 1.3.1 ...
- 1.4 Bulgaria
 - 1.4.1 ...
- 1.5 Croatia
 - 1.5.1 ...
- 1.6 Czechia
 - 1.6.1 ...
- 1.7 Finland
 - 1.7.1 ...
- 1.8 France
 - 1.8.1 ...
- 1.9 Germany
 - 1.9.1 ...
- 1.10 Greece
 - 1.10.1 ...
- 1.11 Hungary
 - 1.11.1 ...
- 1.12 Italy
 - 1.12.1 ...
- 1.13 Lithuania
 - 1.13.1 ...
- 1.14 Norway
 - 1.14.1 ...
- 1.15 Poland
 - 1.15.1 ...
- 1.16 Portugal
 - 1.16.1 ...
- 1.17 Romania
 - 1.17.1 ...
- 1.18 Russia
 - 1.18.1 ...
- 1.19 Slovakia
 - 1.19.1 ...



- 1.20 Spain
 - 1.20.1 ...
- 1.21 Sweden
 - 1.21.1 ...
- 1.22 The Netherlands
 - 1.22.1 ...
- 1.23 Turkey
 - 1.23.1 ...
- 1.24 United Kingdom
 - 1.24.1 ...
- 1.25 Rest of Europe
 - 1.25.1 ...

- 2.3 Other containers - total
 - 2.3.1 Other containers – industry and transport
 - 2.3.2 Other containers – food
 - 2.3.3 Other containers – other applications
- 2.4 Caps and closures - total
 - 2.4.1 Caps and closures – soft drinks
 - 2.4.2 Caps and closures – alcoholic beverages
 - 2.4.3 Caps and closures – food
 - 2.4.4 Caps and closures – other applications

2 Types of Packaging and Applications

- 2.1 Cans - total
 - 2.1.1 Beverage cans – soft drinks
 - 2.1.2 Beverage cans – alcoholic beverages
 - 2.1.3 Cans for preserved food
 - 2.1.4 Aerosol cans – personal care
 - 2.1.5 Aerosol cans – household and cleaning
 - 2.1.6 Aerosol cans – other applications
- 2.2 Tubes - total
 - 2.2.1 Tubes – cosmetics and pharma
 - 2.2.2 Tubes – food
 - 2.2.3 Tubes – other applications

3 Company Profiles

- 3.1 Austria (4)
- 3.2 Belgium (2)
- 3.3 Bulgaria (1)
- 3.4 Finland (1)
- 3.5 France (5)
- 3.6 Germany (16)
- 3.7 Hungary (1)
- 3.8 Italy (11)
- 3.9 Luxembourg (1)
- 3.10 Poland (1)
- 3.11 Portugal (1)
- 3.12 Russia (1)
- 3.13 San Marino (1)
- 3.14 Slovakia (1)
- 3.15 Spain (8)
- 3.16 Sweden (1)
- 3.17 Switzerland (6)
- 3.18 The Netherlands (1)
- 3.19 Turkey (3)
- 3.20 United Kingdom (3)

1.14 Austria

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.

in million units	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Cans	X	X	X	X	X	X	X	X	X	X% p.a.
Tubes	X	X	X	X	X	X	X	X	X	X% p.a.
Other containers	X	X	X	X	X	X	X	X	X	X% p.a.
Closures	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 of rigid metal packaging in Austria from 2005 to 2021 - split by types of packaging

1.14.1.1 Demand - Cans

in million units	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Soft drinks	X									
Alcoholic beverages	X									
Food	X									
Aerosols - Personal care	X									
Aerosols - Household	X									
Aerosols - Others	X									
Total	X	X	X	X	X	X	X	X	X	X% p.a.

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

Chapter 1: Extensive market data for Europe and 23 countries:

- Demand split by types of packaging
- Demand split by applications
- Production, import and export

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 and energy drink 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. In the two mentioned application areas will probably

Chapter 2: Demand of rigid metal packaging:

- Cans
- Tubes
- Other containers
- Caps & Closures

in million units	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Industry & Transport	X	X	X	X	X	X	X	X	X	X
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% p.a.

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

1.14.2 Production and trade

The Austrian production of rigid metal packaging amounted to nearly X billion units in 2013. Production volume is projected to increase by X% p.a. to approx. X billion units in 2021.

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.

in million units	2005	2007	2009	2011	2013	2015p	2017p	2019p	2021p	2013-2021
Belgium	X	X	X	X	X	X	X	X	X	X% p.a.
Bulgaria	X	X	X	X	X	X	X	X	X	X% p.a.
Germany	X	X	X	X	X	X	X	X	X	X% p.a.
Finland	X	X	X	X	X	X	X	X	X	X% p.a.
France	X	X	X	X	X	X	X	X	X	X% p.a.
Greece	X	X	X	X	X	X	X	X	X	X% p.a.
United Kingdom	X	X	X	X	X	X	X	X	X	X% p.a.
Italy	X	X	X	X	X	X	X	X	X	X% p.a.
Croatia	X	X	X	X	X	X	X	X	X	X% p.a.
Lithuania	X	X	X	X	X	X	X	X	X	X% p.a.
The Netherlands	X	X	X	X	X	X	X	X	X	X% p.a.
Norway	X	X	X	X	X	X	X	X	X	X% p.a.
Austria	X	X	X	X	X	X	X	X	X	X% p.a.
Poland	X	X	X	X	X	X	X	X	X	X% p.a.
Portugal	X	X	X	X	X	X	X	X	X	X% p.a.
Romania	X	X	X	X	X	X	X	X	X	X% p.a.
Russia	X	X	X	X	X	X	X	X	X	X% p.a.
Sweden	X	X	X	X	X	X	X	X	X	X% p.a.
Slovakia	X	X	X	X	X	X	X	X	X	X% p.a.
Spain	X	X	X	X	X	X	X	X	X	X% p.a.
Czechia	X	X	X	X	X	X	X	X	X	X% p.a.
Turkey	X	X	X	X	X	X	X	X	X	X% p.a.
Hungary	X	X	X	X	X	X	X	X	X	X% p.a.
Rest of Europe	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: European consumption of metal tubes in the food segment from 2005 to 2021 - split by major countries

2.4 Caps & Closures

The Europe-wide demand for metal caps and closures amounted to X billion units in 2013. This corresponds to X billion units in 2005. The largest markets are Germany, France and Italy. The demand in the sector of soft drinks

Chapter 2: 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.

Thank you for your confidence!

For 15 years, more than 10,000 small, medium-sized, and multinational enterprises from over 60 countries have been benefiting from our studies.

Our studies are especially useful for:

- Producers, processors, traders, suppliers, as well as engineering companies
- Associations, institutes, consultants, investors
- Executive board, finance, business development, strategic planning, market research, marketing, sales, distribution & procurement, etc.



Gain the knowledge for your corporate success now!

Ceresana
Mainaustr. 34, 78464 Constance, Germany
Tel: +49 7531 94293 - 0 Fax: - 27
E-Mail: info@ceresana.com



The list includes a selection of our current market studies. By clicking on the respective topic, you will receive further details:

Mobility

[Automotive Coatings - World](#)
[Automotive Plastics - Europe](#)
[Automotive Plastics - World](#)
[Hybrid & Electric Cars - Europe](#)

[Biobased Packaging - World](#)
[Bioplastics - World](#)
[Polylactic Acid \(PLA\) - World](#)
[Starch Based Plastics - World](#)

Bio-Economy

Chemicals

[Biocides - World](#)
[Carbon Black - World](#)
[Chelating Agents - World](#)
[Fillers - Europe](#)
[Fillers - World](#)
[Flame Retardants - World](#)
[Pigments - World](#)
[Plastic Additives - World](#)
[Plasticizers - World](#)
[Solvents - World](#)
[Stabilizers - World](#)
[Surfactants - World](#)
[Titanium Dioxide \(TiO2\) - World](#)

[Adhesives - Europe](#)
[Adhesives - World](#)
[Insulation Material - Europe](#)
[Insulation Material - World](#)
[Paints & Coatings - Europe](#)
[Paints & Coatings - World](#)
[Plastic Extrusion - Europe](#)
[Plastic Injection - Europe](#)
[Plastic Pipes - Europe](#)
[Plastic Pipes - World](#)
[Plastic Windows - World](#)
[Printing Inks - Europe](#)
[Printing Inks - World](#)
[Windows & Doors - Europe](#)

Industry

Plastics

[Composites \(CFRP & GFRP\) - World](#)
[Engineering Plastics - World](#)
[Expandable Polystyrene \(EPS\) - World](#)
[Masterbatches - World](#)
[Plastics - Europe](#)
[Plastics - World](#)
[Polyethylene \(HDPE\) - World](#)
[Polyethylene \(LDPE\) - World](#)
[Polyethylene \(LLDPE\) - World](#)
[Polypropylene - World](#)
[Polystyrene & EPS - World](#)
[Polyvinyl Chloride \(PVC\) - World](#)
[Silicones - World](#)
[Synthetic Rubber - World](#)
[Thermoplastic Elastomers \(TPE\) - World](#)

[Bags, Sacks & Pouches - Europe](#)
[Bags, Sacks & Pouches - World](#)
[Corrugated Board & Solid Board - Europe](#)
[Flexible Packaging - Europe](#)
[Food Packaging - Europe](#)
[Labels - Europe](#)
[Plastic Caps & Closures - Europe](#)
[Plastic Caps & Closures - World](#)
[Plastic Containers - Europe](#)
[Plastic Films - Europe](#)
[Plastic Films - World](#)
[Plastic Packaging for Cosmetics - Europe](#)
[Rigid Metal Packaging - Europe](#)
[Rigid Plastic Packaging - World](#)

Packaging

To our Store

