

# Market Study: Bags and Sacks - World (2<sup>nd</sup> ed.)

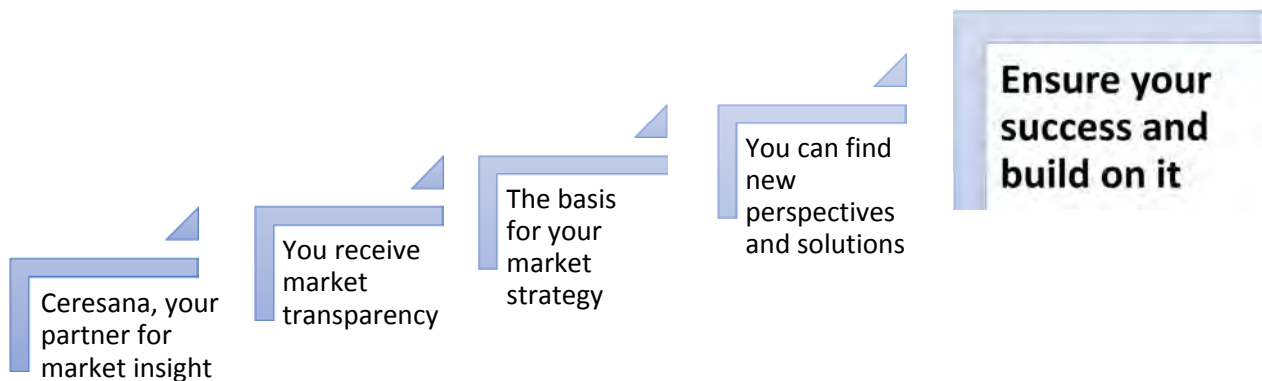


## Dear decision-makers,

our studies provide you with the reliable data and forecasts that enable a secured strategic planning for your company. Our proven expertise as well as country-specific and global analyses supply the basis for your market success. Thus, you can strengthen your competitive position even in the face of increasing market dynamics!

Our experienced team of experts uses profound industry knowledge. We conduct primary and secondary research by means of objective surveys, analyses, forecasts, and preparation of relevant data. With 160 market studies, Ceresana is one of the globally leading market research institutes for the industrial sector.

## Our market expertise supports you in reaching your goals:



### Get a better understanding of the market!

How does the global market develop?  
Where are potential future markets?  
Where are opportunities and risks?  
How high is the market growth per country?  
What are the current economic, political, and industry-specific trends?

### Keep the focus on competition!

What do competitors offer their clients?  
Are there product innovations?  
Where are new market entries or M&A?  
How are competitors positioned?

### Thoroughly analyze your value chain!

Where do ideal procurement, production, and sales conditions prevail?  
What are the most important market actors?  
Are imports or exports advisable?  
Who are the possible business partners for cooperations?

### Identify demand and customers!

What are possible application areas?  
Who are the most important customers?  
Where are further target groups?  
What is the trend of demand?



## **Introduction**

Should single use carrier bags be banned? Discussions on this topic increase in the media of many countries. More and more countries try to banish lightweight plastic bags in particular from retail or at least to reduce their consumption. However, not only carrier bags belong to the sector bags and sacks: The current Ceresana bags and sacks market report, which is already the second edition, also provides extensive information on garbage bags and sacks, heavy duty and industry sacks as well as pouch packaging for foodstuffs. Many different influential factors affect this complex market. Besides several plastic types (mainly LDPE, LLDPE, HDPE, PP, and woven plastic strips), the study also covers bags and sacks made of paper.

### **Industrial Bags Strongly Dependent on Economy**

Demand for heavy duty and industry sacks depends to a large extent on the economic development of the respective countries. Trade links are very important for transport packaging: Demand can profit from free trade agreements and free movement of goods; protectionist measures and trade barriers, however, can impede market dynamics. Furthermore, the construction economy in particular has a decisive impact since construction materials are often transported and traded in woven plastic or polyethylene bags. The fundamental trends regarding the development of the economy as well as the construction industry are therefore analyzed in detail in the individual country profiles (2.1.1 to 2.5.5).

### **Bags Profit from Packaging Industry Trends**

Bags and sacks provide benefits that are desirable for consumers and the lightweight packaging industry: good printability, material saving, appealing looks, and increasingly often resealability. Their usability for food continues to increase. Global demand for pouch packaging made of plastics in the segment food is likely to grow by 4.2% per year until 2025.

### **Stand-Up Pouches Growing Most Dynamically**

Plastics and paper are the most popular materials for packaging bags. A particularly dynamically growing segment within the global packaging industry are stand-up pouches made of plastics that can, for example, be used for dried fruits, ready-made meals for the microwave or for beverages and sauces. In the non-food segment, stand-up pouches are also increasingly used, for example for detergents and cleaners or cosmetics and personal care products. They are also increasingly often used to package wet food for animals. Worldwide, about 230 billion stand-up pouches were sold in 2017. The European market reached a volume of over 45 billion units – thus, sales more than sextupled in the past 15 years. In the USA, Canada, and Mexico, demand rose to more than 30 billion units. Asia-Pacific reached a share of almost 55% of the global market. Demand is expected to continue to increase by 7% respectively in the upcoming years. Especially resealable stand-up pouches will increase rapidly: Ceresana expects growth rates of over 10% per year.

## The Study in Brief

**Chapter 1** provides a description and analysis of the global market for bags and sacks made of plastics or paper – including forecasts up to 2025. For every region of the world, figures (in tonnes) such as demand split by material and by application as well as amounts of production split by material are given.

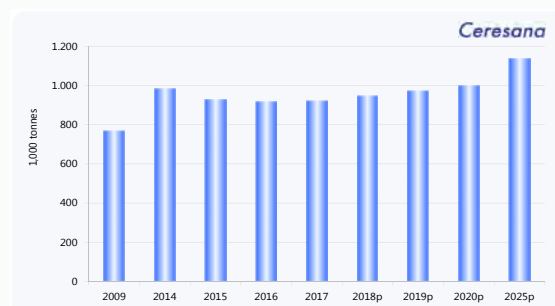
In **Chapter 2**, the demand for bags and sacks split by application and material, production split by material ("LDPE", "LLDPE", "HDPE", "other plastics (film)", "woven plastics", "paper") as well as import and export split by material are analyzed for 16 countries.

**Chapter 3** analyzes the application areas of bags and sacks in detail: Data (in tonnes) on the development of demand in the application areas carrier bags, garbage bags and sacks, heavy duty and industry sacks, food packaging, as well as other applications. The indications are further split by material (plastic and paper).

**Chapter 4** takes a look at the demand (in tonnes) for bags and sacks split by the types of material polyethylene, other plastics (film), woven plastics, as well as paper.

**Chapter 5** provides useful profiles of the largest bags and sacks manufacturers, clearly arranged according to contact details, turnover, profit, product range, production sites, profile summary, product types, and application areas. In-depth profiles of 107 manufacturers are given, including Amcor Ltd., DowDuPont, Formosa Plastics Corp., Mondi Group, Oji Holdings, Sealed Air Corp., Smurfit Kappa Group Plc, Stora Enso Oyj, and Toppan Printing Co., Ltd.

### 2.4.1 Brazil



Graph: Production of bags and sacks in Brazil from 2009 to 2025

in 1,000 tonnes	2009	2014	2015	2016	2017	2018p	2019p	2020p	2025p	2017-2025
LDPE	X	X	X	X	X	X	X	X	X	X% p.a.
LLDPE	X	X	X	X	X	X	X	X	X	X% p.a.
HDPE	X	X	X	X	X	X	X	X	X	X% p.a.
Polyethylene Total	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 Woven	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.
Bags and Sacks Total	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Production of bags and sacks in Brazil from 2009 to 2025 – split by material

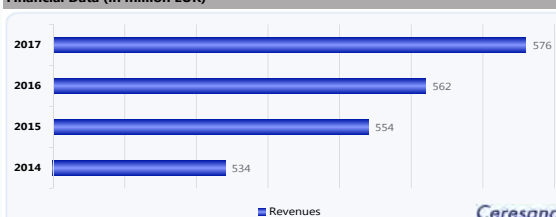
### Bischof + Klein SE & Co. KG

Rahestraße 47  
49525 Lengerich  
Germany

Tel.: +49 5481 920 0

Web: [www.bk-international.com](http://www.bk-international.com)

#### Financial Data (in million EUR)



#### General Information about the Company

##### Divisions, Product Range

The product portfolio of B+K includes within its market organizations industrial packaging, consumer packaging, and technical films:

- Converted flexible packaging:
  - B+K AluFlex, B+K KoBarFlex, B+K Twister Plus wicket bags, B+K U-Pack side gusseted bags, block bottom bags, cross bottom bags B+K Strapapac, liners, open sacks, side gusseted valve bags, stand-up pouches, carry packs, cross bottom valve bags/standard, mailing bags, Walpacks
- ...

##### Production Sites

B+K has production sites in:

- Lengerich, Germany
- ...

##### Profile Summary

The family-owned B+K-GRUPPE was founded as "Papierfabrik und Prägeanstalt Bischof & Klein" in 1892. Today, the company specializes flexible packaging and technical films made of plastics and plastic composites.

#### Specific Information about Bags & Sacks

In the segment flexible converted packaging Bischof + Klein produces:

- B+K AluFlex: Single-sack solution with oxygen and water vapor barrier and special ventilation; aluminum or metalized polyester compound...

The following table provides an overview of all figures included in this study, referring to the years 2009 to 2025. A check mark was put for each region and country (country code according to ISO-3166 Alpha-2) as

Demand and production volume as well as trade figures are indicated in metric tonnes.

[illegible]

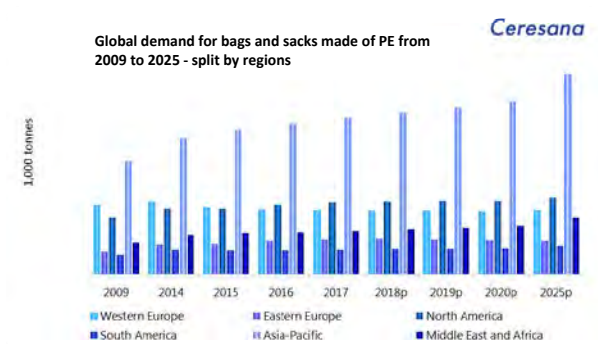
## Table of Contents (1/2)

### 1 Market Data: World and Regions

- 1.1 World
  - 1.1.1 Demand
  - 1.1.2 Revenues
- 1.2 Western Europe
  - 1.2.1 Demand
  - 1.2.2 Production
- 1.3 Eastern Europe
  - 1.3.1 Demand
  - 1.3.2 Production
- 1.4 North America
  - 1.4.1 Demand
  - 1.4.2 Production
- 1.5 South America
  - 1.5.1 Demand
  - 1.5.2 Production
- 1.6 Asia-Pacific
  - 1.6.1 Demand
  - 1.6.2 Production
- 1.7 Middle East / Africa
  - 1.7.1 Demand
  - 1.7.2 Production

### 2 Market Data: Country Profiles

- 2.1 Western Europe
  - 2.1.1 France
    - 2.1.1.1 Demand
    - 2.1.1.2 Production and Trade
  - 2.1.2 Germany
  - ...
  - 2.1.3 Italy
  - ...
  - 2.1.4 Spain
  - ...
  - 2.1.5 United Kingdom
  - ...
  - 2.1.6 Other Western Europe
  - ...
- 2.2 Eastern Europe
  - 2.2.1 Poland
  - ...
  - 2.2.2 Russia
  - ...
  - 2.2.3 Turkey
  - ...
  - 2.2.4 Other Eastern Europe
- 2.3 North America
  - 2.3.1 Canada
  - ...
  - 2.3.2 Mexico
  - ...
  - 2.3.3 USA
  - ...
- 2.4 South America
  - 2.4.1 Brazil
  - ...
  - 2.4.2 Other South America
  - ...
- 2.5 Asia-Pacific
  - 2.5.1 China
  - ...
  - 2.5.2 India
  - ...
  - 2.5.3 Japan
  - ...
  - 2.5.4 South Korea
  - ...
  - 2.5.5 Other Asia-Pacific
  - ...



## **Table of Contents (2/2)**

### **3 Market Data: Applications**

- 3.1 World
  - 3.1.1 Carrier Bags - Plastics
  - 3.1.2 Garbage Bags and Sacks - Plastics
  - 3.1.3 Heavy Duty and Industry Sacks - Plastics
  - 3.1.4 Food Packaging - Plastics
  - 3.1.5 Other Applications - Plastics
  - 3.1.6 Carrier Bags - Paper
  - 3.1.7 Heavy Duty & Industry Sacks - Paper
  - 3.1.8 Food Packaging - Paper
  - 3.1.9 Other Applications - Paper
- 3.2 Western Europe
  - ...
- 3.3 Eastern Europe
  - ...
- 3.4 North America
  - ...
- 3.5 South America
  - ...
- 3.6 Asia-Pacific
  - ...
- 3.7 Middle East / Africa
  - ...

### **4 Market Data: Products**

- 4.1 Polyethylene (Film)
  - 4.1.1 World
  - 4.1.2 Western Europe
  - 4.1.3 Eastern Europe
  - 4.1.4 North America
  - 4.1.5 South America
  - 4.1.6 Asia-Pacific
  - 4.1.7 Middle East / Africa
- 4.2 Other Plastics (Film)
  - ...
- 4.3 Woven Plastics
  - ...
- 4.4 Paper
  - ...

### **5 Company Profiles**

- 5.1 Western Europe
  - Austria (3 Producers)
  - Finland (5)
  - France (3)
  - Germany (9)
  - Ireland (3)
  - Italy (6)
  - Luxembourg (1)
  - Spain (1)
  - Sweden (3)
  - Switzerland (2)
  - The Netherlands (4)
  - United Kingdom (7)
- 5.2 Eastern Europe
  - Croatia (1)
  - Czechia (1)
  - Greece (1)
  - Poland (1)
  - Turkey (3)
  - Ukraine (1)
- 5.3 North America
  - Canada (3)
  - Mexico (1)
  - USA (21)
- 5.4 South America
  - Brazil (3)
- 5.5 Asia-Pacific
  - Australia (2)
  - Hong Kong (1)
  - India (2)
  - Japan (12)
  - Malaysia (1)
  - Singapore (1)
  - Taiwan (2)
  - Vietnam (1)
- 5.6 Africa
  - South Africa (2)

## This study is particularly useful for

- Manufacturers, processors and traders of bags and sacks
- Suppliers of raw materials such as polyethylene, polypropylene, PVC, PET, bioplastics, kraft paper, and additives such as antioxidants, glues or stabilizers
- Manufacturers and traders of plastic films, plastic strips, kraft paper, and paper fibers
- Associations and institutes
- Executive board, finance, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement



Yours Oliver Kutsch, CEO

## Thank you for your trust!

For 15 years, we have been supplying over 10,000 companies – ranging from small and medium-sized firms to large enterprises – with the decisive advantage in knowledge.



## Place your order now

- Market studies or
- Free reading samples

Ceresana  
Mainaustr. 34  
78464 Konstanz  
Germany  
Tel: +49 7531 94293 - 0  
Fax: +49 7531 94293 - 27  
E-mail: [info@ceresana.com](mailto:info@ceresana.com)  
Web: [www.ceresana.com/en](http://www.ceresana.com/en)

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](#)

**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](#)

**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](#)

**Bio-Economy**

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

**Industry**

[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](#)

**Packaging**

[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](#)