Market Study: Flexible Packaging

Europe Report (2nd edition)

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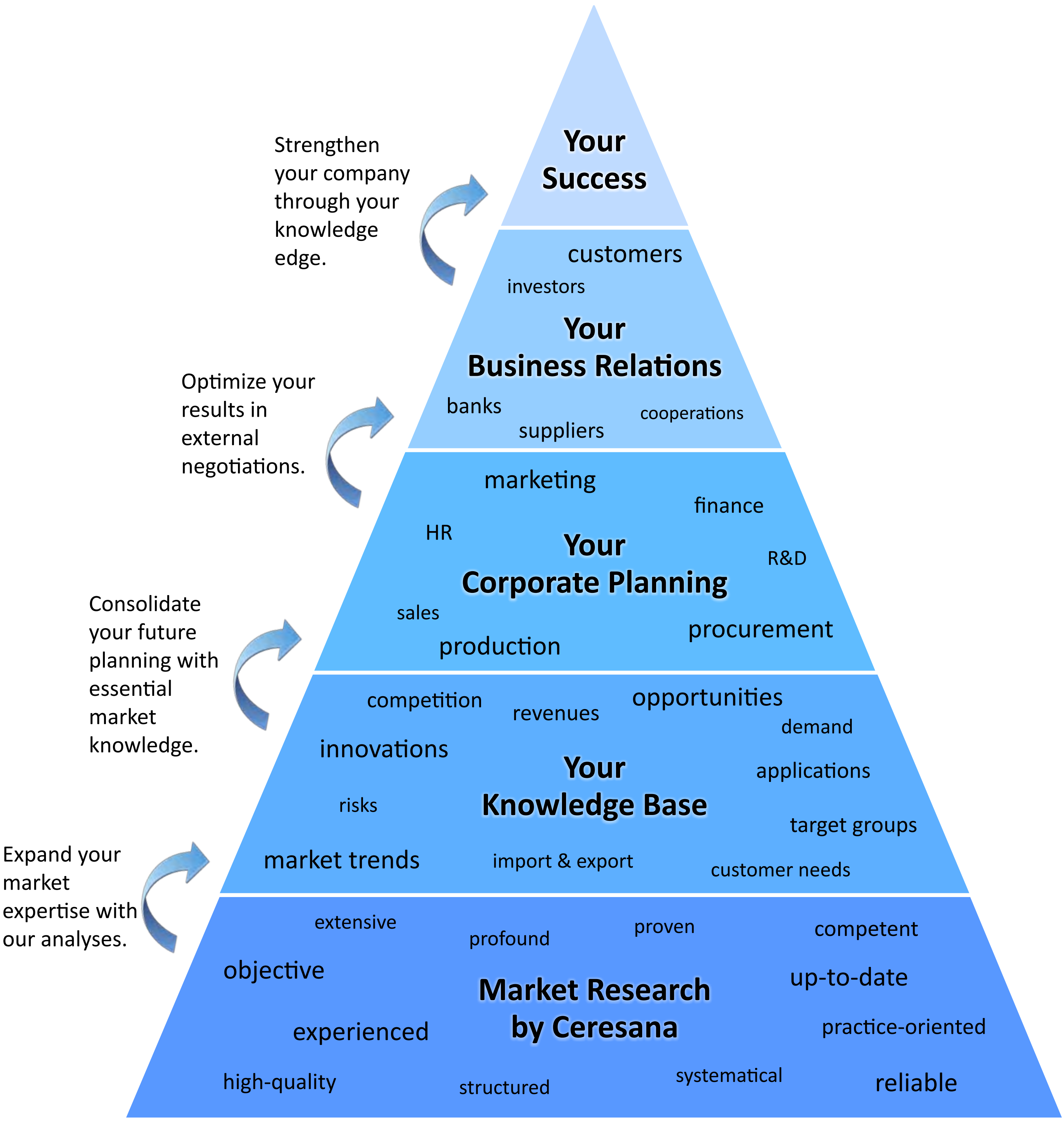

This brochure provides further information on the study “Flexible Packaging - Europe (2nd edition)”

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3 Company Profiles*

Bischof + Klein SE & Co. KG

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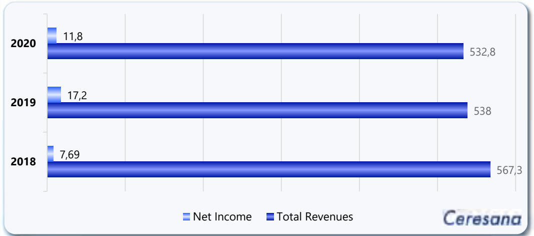
49525 Lengerich
Germany

Tel.: +49 5481 920 0
Web: www.bk-international.com

Financial Key Data (in million EUR)



General Information about the Company

Divisions, Product Range	The product portfolio includes: • Clean Room Packaging • Converted Flexible Packaging • Material on Reel • Technical Films and Composites
Production Sites	The company operates five production sites are located in: • France • Germany • The United Kingdom • Poland
Profile Summary	Bischof + Klein was founded in 1892 and specializes in the manufacturing of flexible packaging.

In addition to its production sites, the company operates sales offices and agencies in over 20 countries worldwide.

In 2020, the company employed 2,636 people. The same year, total assets amounted to EUR 322 million.

Split by region, 41.9% of revenues in 2020 were generated in Germany, 47.3% in other EU countries, and 10.8% in other regions.

Split by business segments, 30.4% of revenues in 2020 were generated with industrial packaging, 48.2% with consumer packaging, and 21.4% with special.

Bischof + Klein is certified according to ISO 9001.

Specific Information about Flexible Packaging

Bischof + Klein produces flexible packaging for various applications and industries, including agriculture and horticulture, chemicals and petrochemicals, construction and housing, cleaning materials, hygiene, pet food, metal, e-commerce, and the food industry. Products include, gusseted bags, mail order bags, valve sacks, cross bottom sacks, open mouth sacks, and stand-up pouches. Additionally, the company offers bags for clean room applications as well as films.

*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, 72 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.

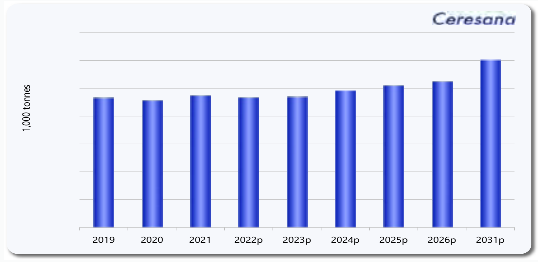
In addition, the market analysis sheds light on the application areas: The areas “food and beverages,” “consumer non-food,” “heavy-duty and transport,” and “carrier bags” are examined for the eight largest markets (Germany, France, the United Kingdom, Italy, Poland, Russia, Spain, and Turkey) as well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

Chapter 3 provides 72 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 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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3. Discover which markets hold the biggest opportunities for your company and thus gain a decisive competitive advantage.
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6. Draw on reliable forecasts on countries, application areas and products for successful business planning.
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8. Find out which global and regional developments influence supply and demand.

Our studies are particularly useful for:

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- Associations, institutes, consultants, banks, investors, founders, freelancers, entrepeneurs, and service providers
- Executive boards, finance, business development, strategic planning, market research, marketing, sales, distribution, R&D, and procurement

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- Automotive Plastics - World
- Hybrid & Electric Cars - Europe

Bio-Economy

- Biobased Packaging - World
- Bioplastics - World
- Polylactic Acid (PLA) - World
- Starch Based Plastics - World

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

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

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

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

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