Market Study: Plastic Containers - Europe

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Oliver Kutsch, CEO

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The strategic planning enables you to:

- Restructure your product portfolio
- Evaluate current and potential locations
- Plan and develop new marketable products
- Better adapt to needs and requirements of customers
- Deal with future markets

Plastic containers are available in the most diverse designs, shapes, and materials and can be used in a wide variety of applications. These products of daily life are the result of continuous research and optimization; the requirements are constantly increasing. This study focuses on plastic containers. Bags or similar flexible packaging are not included in the market data. In many applications, plastics replace other materials such as glass or metal due to their many useful properties: Ceresana forecasts the European market of plastic containers to reach a volume of more than 12.4 million tonnes in 2024.

PET Discovers New Areas of Application

PET packaging already reached high market shares in the segments CSD (carbonated soft drinks) and packaged water. Now, PET bottles and other containers also enter other segments, such as food, fruit juices, and household chemicals (e.g. detergents). Their positive properties are the reason for that: They weigh comparatively little, are recyclable, do not break, and offer high clarity. The gas barrier properties and protection against UV radiation continue to improve. Especially in the segment food, PET containers are a growth market. Thus, Ceresana's analysts expect demand for PET containers in this segment, for example, in Poland to rise by an impressive 4.6 % per year.

State Regulations Change the Market

Time and again, new laws and regulations bring about changes for the market. For manufacturers and dealers, it is crucial to make decisions at an early stage and to quantify their consequences. An example are the new regulations for PET bottles for alcoholic beverages in Russia.

Convenience and Sustainability

Besides overall state regulations and economic development, the market for plastic containers is subject to a range of further influences. The beverage market in particular, including the packaging structure, income development, and social trends, must be taken into account. Urbanization and demographic change are accompanied with changing consumption patterns. In some segments, plastics are replacing traditional materials. At the same time, rigid plastic containers also face an increasing competition by bags and other flexible plastic packaging solutions. Other trends such as convenience, rising number of women in employment, sustainability or light weighting also influence the market and require an intensive examination of the market mechanisms.

The Study in Brief:

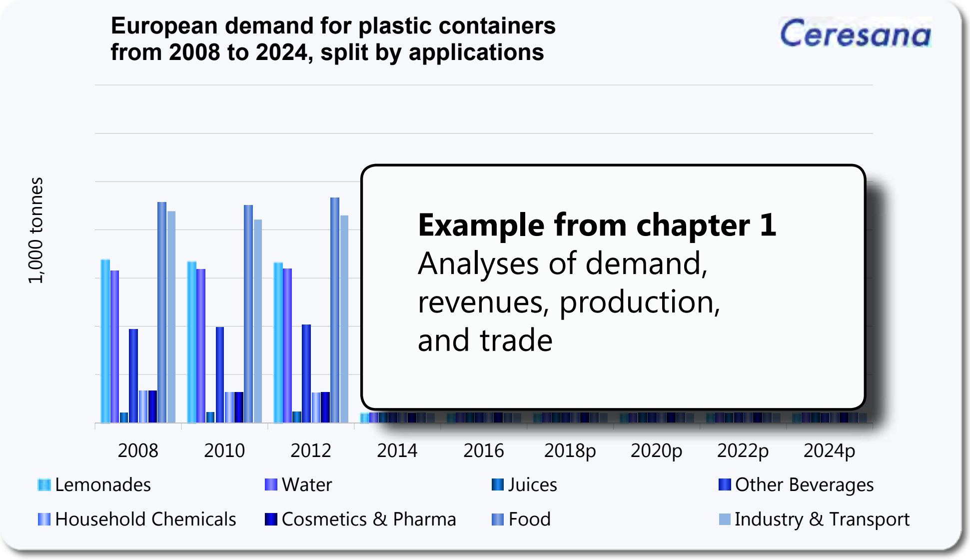
Chapter 1 analyzes demand, production, import, and export (in 1,000 tonnes) as well as revenues (in million US-dollar and million euro) in regard to plastic containers for 27 countries. Further, the study analyzes the demand for containers made of various types of plastics within the individual areas of application (e.g. PET containers in the segment food).

Chapter 2: The application areas of plastic containers are described in detail: Data on consumption trends in the application areas lemonades, water, juices, other beverages, household chemicals, cosmetics & pharmaceuticals, food, and industry & transport.

Chapter 3 analyzes the demand for containers split by the types of plastic PET, PP, HDPE, LDPE & LLDPE, PS & EPS, PVC, and other plastics.

Chapter 4 provides company profiles of major manufacturers of plastic containers – clearly arranged according to contact details, revenues, profit, product range, production sites, and profile summary. In-depth profiles of 82 producers are given, including Amcor Limited, Ball Corporation, Berry Global, DS Smith Plc, Papier-Mettler KG, Reynolds Group Holdings Limited, Sealed Air Corporation, Inc., Sonoco Products Company, and Bemis Company, Inc.

1 Market Data



2 Applications

3 Types of Plastics

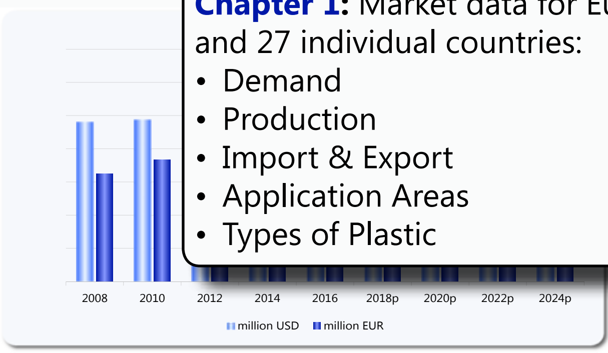
4 Company Profiles

1.24 Switzerland - Example of a country profile

1.24.1 Demand and Revenues - Total

Revenues

About EUR X million of revenues were generated with plastic containers in Switzerland in 2016. Market value is projected to increase at an average rate of X% p.a. until 2024.



Chapter 1: Market data for Europe and 27 individual countries:

- Demand
- Production
- Import & Export
- Application Areas
- Types of Plastic

Graph: Revenues generated with plastic containers in Switzerland from 2008 to 2024 in USD billion and EUR billion

1.24.2 Demand Split by Applications, and Types of Plastics

For a long time, fruit juices were regarded as very healthy drinks. For some products, this surely is true. However, the sugar content in most juices is much higher than most consumers have been aware of for a long time. For years, the segment has been struggling with an image problem and consumers are demanding juices with a lower sugar content. Many consumers reduce their consumption and switch to healthier alternatives. The result is a continuously declining demand for fruit juices in Switzerland since 2011. In this period, the per capita demand declined by almost X%. However, the amount of PET bottles in the packaging mix continuous to increase. Soon, more than half of the juices in Switzerland will probably be packed in plastic bottles. Despite the weak development of demand for juices in Switzerland, this will lead to an increasing demand for plastic containers in this segment in the following years.

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Lemonades	X	X	X	X	X	X	X	X	X	X% p.a.
Water	X	X	X	X	X	X	X	X	X	X% p.a.
Juices	X	X	X	X	X	X	X	X	X	X% p.a.
Other Beverages	X	X	X	X	X	X	X	X	X	X% p.a.
Household Chemicals	X	X	X	X	X	X	X	X	X	X% p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X% p.a.
Food	X	X	X	X	X	X	X	X	X	X% p.a.
Industry & Transport	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 for plastic containers in Switzerland from 2008 to 2024 – split by applications

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
PET	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.
HDPE	X	X	X	X	X	X	X	X	X	X% p.a.
LDPE & LLDPE	X	X	X	X	X	X	X	X	X	X% p.a.
PS & EPS	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	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 for plastic containers in Switzerland from 2008 to 2024 – split by types of plastic

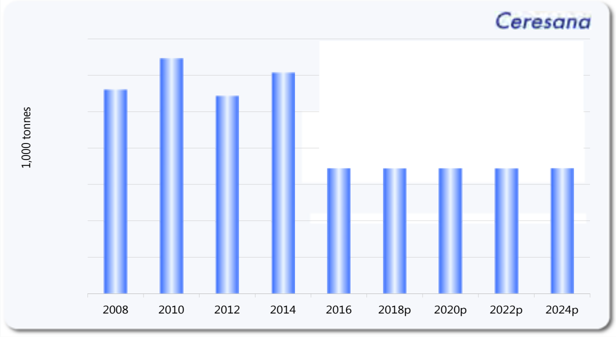
in 1.000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Lemonades	X	X	X	X	X	X	X	X	X	X% p.a.
Water	X	X	X	X	X	X	X	X	X	X% p.a.
Juices	X	X	X	X	X	X	X	X	X	X% p.a.
Other Beverages	X	X	X	X	X	X	X	X	X	X% p.a.
Household Chemicals	X	X	X	X	X	X	X	X	X	X% p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X% p.a.
Food	X	X	X	X	X	X	X	X	X	X% p.a.
Industry & Transport	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 for HDPE containers in Switzerland from 2008 to 2024 – split by applications

1.24.3 Production and Trade

Company
xxx
xxx
xxx

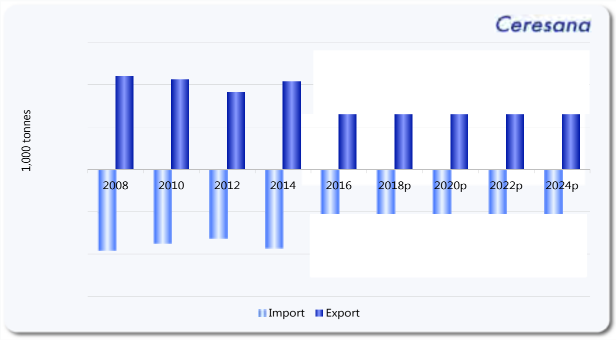
Table: Important manufacturers of plastic containers in Switzerland



Graph: Production of plastic containers in Switzerland from 2008 to 2024

Import and Export

In 2016, Swiss exports, amounting to X tonnes, fell behind imports accounting for X tonnes.



Graph: Import and export of plastic containers in Switzerland from 2008 to 2024

2.7 Food - Example of Application Areas

Until 2016, the sales volume of plastic containers in the segment food rose to X million tonnes. We anticipate demand to continue to increase during the next eight years. Compared to 2016, consumption is projected to increase by X% p.a. until 2024. Demand will total approx. X million tonnes that year.

In this study, the segment food includes all plastic containers used to package foodstuffs, e.g. yoghurt and other dairy products such as fresh cheese etc., meat, sauces & dressings, edible oils, ice cream, ready-made meals, salads, sweets, snacks, and fast food as well as fruit and vegetables (e.g. EPS punnets).

The market for plastic containers in the sector food (excluding beverages) profits from an increasing demand for packaged food. In some Eastern European countries, the amount of packaged food is still significantly lower than in Western Europe. Especially more expensive convenience products are not as popular there yet. However, a rapid catching-up process is taking place. Rising incomes, a growing proportion of working women, and stricter hygiene standards are causing demand to boom. At the same time, more and more food is packaged in plastic containers in Western European countries as well. These are increasingly replacing containers made from other materials such as glass, metal or cardboard in several sectors. The need for convenience and time-saving of many consumers supports the market for prepackaged meals ready for consumption and therefore also the market for plastic containers even further. However, rigid plastic containers are facing increasing competition by flexible packaging solutions such as plastic stand-up pouches, which manufacturers hope will help to reduce weight and resource consumption even more. This trend counteracts the general growth of the market for rigid plastic containers and prevents even higher growth rates.

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016- 2024
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.
Denmark	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									
Greece	X									
United Kingdom	X									
Italy	X									
Croatia	X									
Lithuania	X									
The Netherlands	X									
Norway	X									
Austria	X									
Poland	X									
Portugal	X									
Romania	X									
Russia	X									
Sweden	X									
Switzerland	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.
Slovenia	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.
Other	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 demand for plastic containers in the segment food from 2008 to 2024 – split by countries

Chapter 2: Demand per country split by application areas:

- Lemonades
- Water
- Fruit Juices
- Other Beverages
- Household Chemicals
- Food
- Cosmetics & Pharma
- Other Applications

3 Products

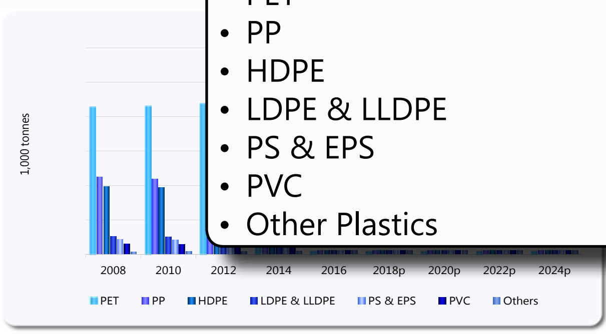
In 2016, about X million tonne

important types of plastic fo

important material was PET w

Chapter 3: Demand per country split by types of plastics:

- PET
- PP
- HDPE
- LDPE & LLDPE
- PS & EPS
- PVC
- Other Plastics



Graph: European demand for plastic containers from 2008 to 2024, split by types of plastic

3.2 Polypropylene

In 2016, about X million tonnes of PP were processed in Europe. In the past eight years, demand rose at an average rate of X% per year. Germany generated about X% of European demand in 2016. The highest relative increase during the next eight years is expected for Bulgaria and Lithuania. Overall European demand for PP will rise by about X% p.a. to approx. X million tonnes over the next eight years.

PP containers are used, amongst others, as food packaging. Many crates, trays, pails or barrels to transport goods are made of PP as well. Another advantage of polypropylene is its high heat resistance at high temperatures.

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016- 2024
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.
Denmark	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.
Switzerland	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.
Slovenia	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.
Other	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.**

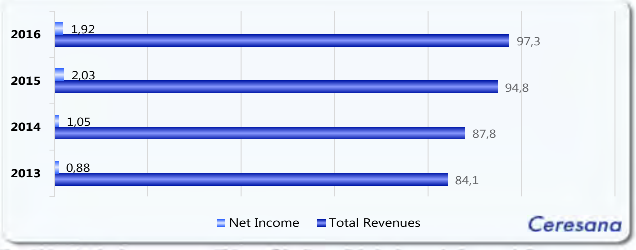
Table: European demand for PP from 2008 to 2024 – split by countries

Gizeh Verpackungen GmbH & Co. KG

Breiter Weg 40
51702 Bergneustadt
Germany

Tel.: +49 2261 4010
Web: www.gizeh.de

Financial Data (in million EUR)



*Financial data related to the parent company JKB Kunststoff-Beteiligungs-GmbH headquartered in Bergneustadt, Germany.

General Information about the Company

Divisions, Product Range

The company's product portfolio includes various plastic packaging for:

- Desert/Yoghurt
- Cream cheese and spreadable fats
- Delicatessen and cold meats
- Convenience food and sauces
- Confectionery and ice cream
- Body Care
- Pet food
- Other

Chapter 4: Data and facts on 82 producers, clearly arranged by:

- Financial key data
- Production sites
- Profile summary

Production Sites

The company's production sites are located in:

- Germany (2)
- Canada (1)
- France (1)
- Poland (1)

Profile Summary

The company was founded as a processors of cigarette paper in Cologne in 1920. Headquarters were relocated to Bergneustadt in 1954.

Gizeh Verpackungen consists of 9 subsidiaries (Gizeh Group) with headquartered in Germany, France, Poland, and Canada. The company is part of JKB Kunststoff-Beteiligungs-GmbH, the parent company of Gizeh Verpackungen and Gizeh Technologies.

The Gizeh Group employs more than 630 people (December 2016) and produces more than three million plastic containers per year. Europe is the main sales market for the Gizeh Group.

Since 2013, the company also produces and sells products in North America. In 2016, the company moved to a new, larger production plant in Brantford, Canada.

The company presented a new range of reusable cups with digital printing in 2017, which are particularly suitable for events. Further, new PET bottles in a metallic look and structure effects as well as a two chamber cup for yogurt desserts have been developed.

Specific information about Plastic Containers

The product portfolio includes a wide range of plastic containers such as cups, trays, cans, and bottles. Production technologies used are injection molding, Injection stretch blow molding, and thermoforming. Decoration processes include injection molding/IML, OML, sleeve, print, and digital printing.

The portfolio includes standardized and specialty products in the following market segments.: Dessert/yoghurt, cream cheese and spreadable fats, delicatessen and sausage products in the segment convenience, convenience foods and sauces, confectionery and ice cream, body care (through the subsidiary GIZEH PET GmbH, in

such as animal feed or househo

Chapter 4: Detailed profiles of the most important producers, such as Amcor, Ball, Berry, DS Smith, Papier-Mettler, Reynolds, Sealed Air, Sonoco, and Bemis.

This study is useful for:

- Manufacturers, dealers, and distributors of plastic containers (e.g. bottles, cans, cups, bowls, boxes, crates, barrels, buckets, etc.)
- Manufacturers and bottlers of the products lemonades, water, juices, beer, and other beverages, as well as of food, cosmetics, pharmaceuticals, or household chemicals, or industrial goods
- Manufacturers of plastics and additives such as PET, PP, HDPE, LDPE, LLDPE, PS, EPS, PVC, PLA, pigments, stabilizers, plasticizers, etc.
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Polyethylene (LDPE) - World
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