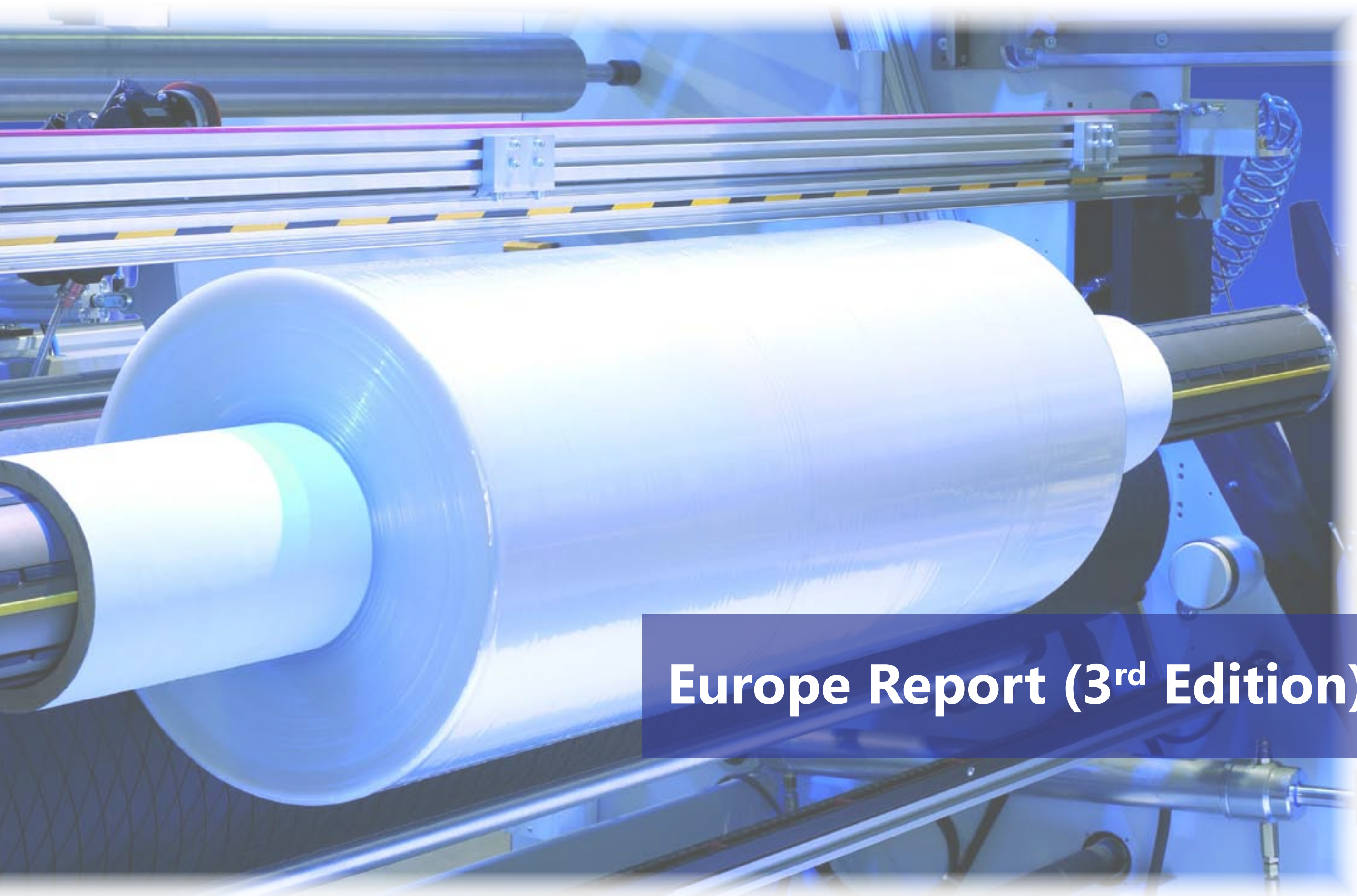
Market Study: Plastic Films



Europe Report (3rd Edition)

Ceresana
Market Research Since 2002

This brochure provides further information on the study: "Plastic Films – Europe (3rd Edition)"

Executive Summary

Are sophisticated specialty products the future of European industry? Demand is increasing for films with special properties. In many European countries, however, the production of plastic films is becoming less and less competitive compared to other regions of the world. Ceresana has now analyzed the entire European market for plastic films for the third time. The company's market researchers forecast that plastic film demand in Europe will grow to around 13.8 million tonnes by 2033.

Challenges for Plastic Film Manufacturers

Demand for plastic films is increasing overall. However, crises and inflation are affecting consumer sentiment in large parts of Europe – and therefore also the market for packaging materials. In addition, the EU plastics own resource and the new EU Packaging and Packaging Waste Regulation (PPWR) as well as national and in some cases even municipal regulations aim to reduce packaging waste. Plastic bags are often replaced by paper bags or eliminated altogether. However, films are not only used to make bags, but also packaging films, shrink and stretch films, agricultural films, and construction films, for example. The demand for bags and sacks made from PE films is decreasing. However, the new market report by Ceresana also covers the markets for PP, PET, PVC , and other plastic films. The focus of this study is on flexible films. Sheets, boards, and panels are not considered.

Trend Towards Ultra-Thin High-Tech Films

Agricultural films are recording above-average growth: In various European countries, efforts to intensify agriculture, forestry, and horticulture are increasing the use of wrapping films, silage films, mulch films, anti-dew films, greenhouse films, and other innovative solutions. Plants increasingly need to be protected against extreme weather events. The demand for protective and functional films is also growing in the construction industry. The consumption of construction films follows the order situation of the respective construction industry. In contrast, demand for secondary and transport packaging such as shrink and stretch films depends on the macroeconomic development and the consumer climate. In addition to market data, forecasts, and company profiles, the plastic film market report also provides background information on the regulatory framework in the EU as well as the economic situation and the situation in the packaging industry in the individual European countries.

Current Market Study:

Chapter 1 analyzes the total European demand for and production of plastic films as well as revenues generated with plastic films. In addition, the production and demand volumes are broken down for the various types of plastic. The film consumption of the various application areas is also examined.

Chapter 2 presents a detailed analysis of the plastic films market size and growth in 21 European countries: Demand, revenues, and production are each considered individually. In addition, plastic film demand is divided into 5 application areas. Production and demand are also broken down for 5 types of plastic.

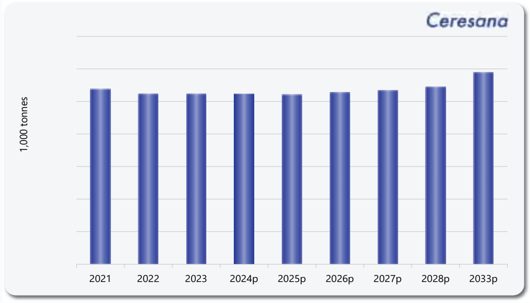
Chapter 3 provides company profiles of the 81 most important plastic film manufacturers, including Amcor, Toray, Covestro, Sealed Air, Mondi, Constantia, UFLEX, and Coveris.

Table of Contents (1/3)

2.3 Czechia

2.3.1 Demand and Revenues

In 2023, about X tonnes of plastic films were utilized in Czechia. We forecast demand to increase by X% p.a. to approx. X tonnes in 2033.
Revenues generated with plastic films amounted to approx. EUR X million in 2023. This value is projected to increase at an average rate of X% p.a. until 2033.



Graph: Demand in Czechia from 2021 to 2033

Revenues	2021	2022	2023	2024p	2025p	2026p	2027p	2028p	2033p	2023-2033
Million USD	X	X	X	X	X	X	X	X	X	X % p.a.
Million EUR	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Revenues generated in Czechia from 2021 to 2033, in million USD and million EUR

in 1,000 tonnes	2021	2022	2023	2024p	2025p	2026p	2027p	2028p	2033p	2023-2033
Packaging Films	X	X	X	X	X	X	X	X	X	X % p.a.
Bags & Sacks	X	X	X	X	X	X	X	X	X	X % p.a.
Shrink & Stretch Films	X	X	X	X	X	X	X	X	X	X % p.a.
Agricultural Films	X	X	X	X	X	X	X	X	X	X % p.a.
Other Films	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 Czechia from 2021 to 2033 – split by application

in 1,000 tonnes	2021	2022	2023	2024p	2025p	2026p	2027p	2028p	2033p	2023-2033
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.
Others	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.**

Table1: Demand in Czechia from 2021 to 2033 – split by type of plastic

Packaging Market:

The Czech market for packaging was estimated at around EUR 750 million in 2024, with the market for plastic packaging alone at EUR 422 million. The Czech and Slovak Packaging Institute SYBA (syba.cz) currently represents the interests of around 140 members, including foreign manufacturers with Czech branches (e.g. Alpla, Amcor, Mondi, Smurfit Westrock, and Tetra Pak), as well as large packaging consumers (e.g. Penny Market and Škoda Auto) and research institutions.

According to EKO-KOM, the organization responsible for collection and recycling, around 1.26 million tonnes of packaging waste were generated in Czechia in 2023, 4% less than in 2022, or around 115 kg per inhabitant. Of this, 75% was recycled and 11% was used for energy recovery. The recycling rate for paper and cardboard packaging

Table of Contents (2/3)

reached 98%, for glass 78%, for metal 67%, and for plastic 49%. At the end of 2023, 21,301 manufacturers, bottlers, and importers were integrated into the EKO-KOM system. Czechia received a reduction of EUR 32 million in the EU levy for non-recycled plastic waste in 2023 and paid EUR 89 million.

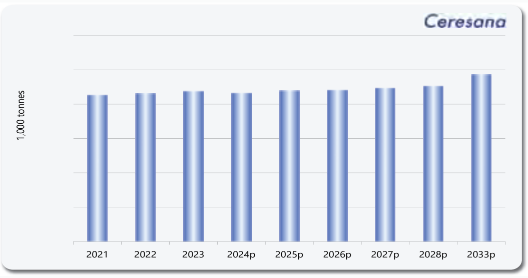
General Economic Situation:

The Czech economy is heavily dependent on exports, especially to Germany. Czechia was the last EU country to return to pre-COVID-19 economic levels, but only with great difficulty: After several years above the EU average, Czech GDP growth fell to 2.8% in 2022 (EU: 3.7%). After a decline of 0.1% in 2023 and an increase of 1.1% in 2024, the IMF expects Czechia to overtake the EU (1.6%) again in 2025 with 2.3%. High inflation (over 12% in 2023), tax increases, subsidy cuts, and an austerity policy to reduce the high national debt (currently around 51% of GDP) are causing real wages and consumer spending to fall. For a long time, Czechia was the destination of shopping tourists. Now, more and more Czechs are shopping in neighboring countries due to rising prices. The unemployment rate (2.6% in 2024) is the lowest in the EU. More and more companies are complaining about labor shortages, partly because immigration is handled restrictively. As projects for new gigafactories and battery factories have been relocated to neighboring countries, there are fears in Czechia of not being able to keep pace with important technologies and being stuck between low-wage countries and more developed regions. Now the Czech government sees the future particularly in the expansion of the country into a logistics hub, in chip production, nuclear power ("small modular reactors"), and the mining of lithium.

The current conservative-economic-liberal majority is under threat in the parliamentary elections expected to be held in October 2025. One of the election campaign promises of the current government under Petr Fiala is that salaries will reach German levels and that the Czechs will be among the top 10 EU countries in terms of GDP per capita by 2040. In 2023, Czechia ranked 16th in the EU-27 with EUR 29,200, behind Spain and Slovenia (while Austria, which was less developed until the Second World War, ranked fifth with EUR 51,800).

2.3.2 Production

X tonnes of plastic films were produced in 2023. We forecast production volume to amount to approx. X tonnes in 2033. Relative to 2023, this constitutes an average increase of X% per year.



Graph: Production in Czechia from 2021 to 2033

in 1,000 tonnes	2021	2022	2023	2024p	2025p	2026p	2027p	2028p	2033p	2023-2033
Polyethylene	X	X	X	X	X	X	X	X	X	X % p.a.
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.
Polypropylene	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.
Others	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: Production in Czechia from 2021 to 2033 – split by type of plastic

2 Market Data: Country Profiles

(For each country: demand split by application and type of plastic, production split by type of plastic)

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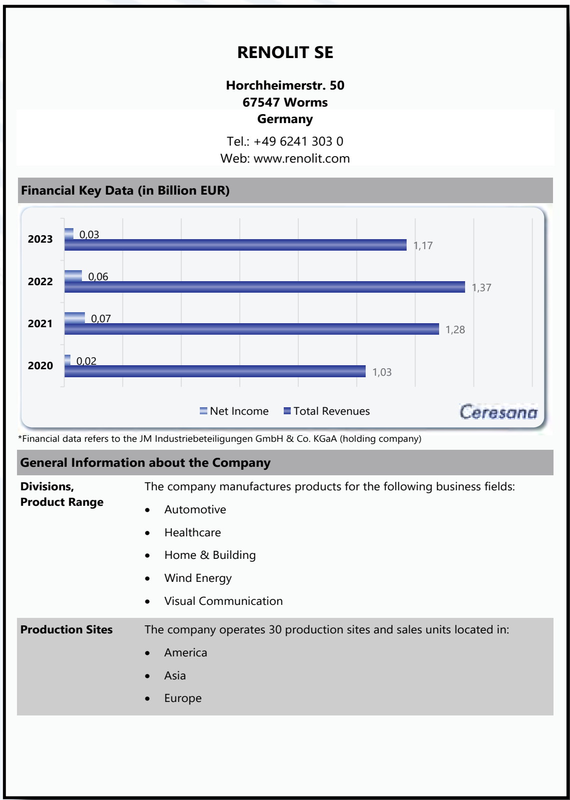
Table of Contents (3/3)

3 Company Profiles*



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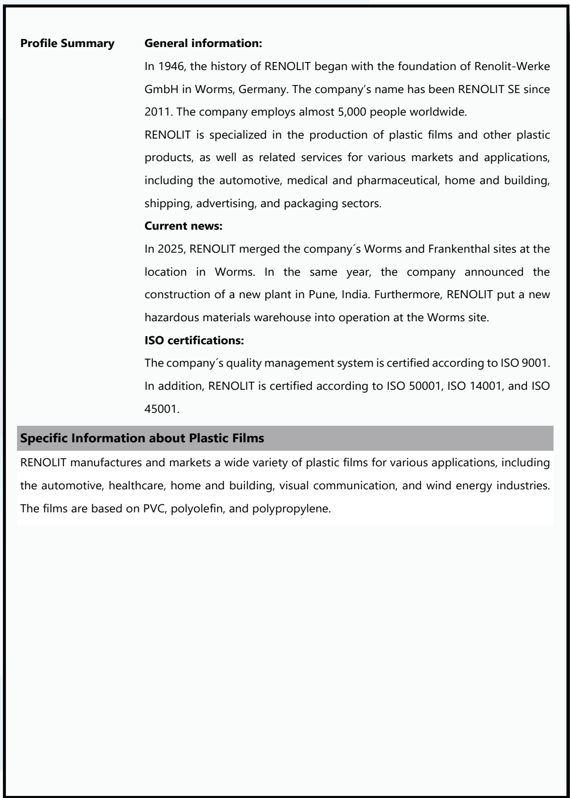
Financial Key Data (in Billion EUR)

*Financial data refers to the JM Industriebeteiligungen GmbH & Co. KGaA (holding company)

General Information about the Company

Divisions, Product Range	The company manufactures products for the following business fields: • Automotive • Healthcare • Home & Building • Wind Energy • Visual Communication
Production Sites	The company operates 30 production sites and sales units located in: • America • Asia • Europe



Profile Summary	**General information:** In 1946, the history of RENOLIT began with the foundation of Renolit-Werke GmbH in Worms, Germany. The company's name has been RENOLIT SE since 2011. The company employs almost 5,000 people worldwide. RENOLIT is specialized in the production of plastic films and other plastic products, as well as related services for various markets and applications, including the automotive, medical and pharmaceutical, home and building, shipping, advertising, and packaging sectors. **Current news:** In 2025, RENOLIT merged the company´s Worms and Frankenthal sites at the location in Worms. In the same year, the company announced the construction of a new plant in Pune, India. Furthermore, RENOLIT put a new hazardous materials warehouse into operation at the Worms site. **ISO certifications:** The company´s quality management system is certified according to ISO 9001. In addition, RENOLIT is certified according to ISO 50001, ISO 14001, and ISO 45001.

Specific Information about Plastic Films

RENOLIT manufactures and markets a wide variety of plastic films for various applications, including the automotive, healthcare, home and building, visual communication, and wind energy industries. The films are based on PVC, polyolefin, and polypropylene.

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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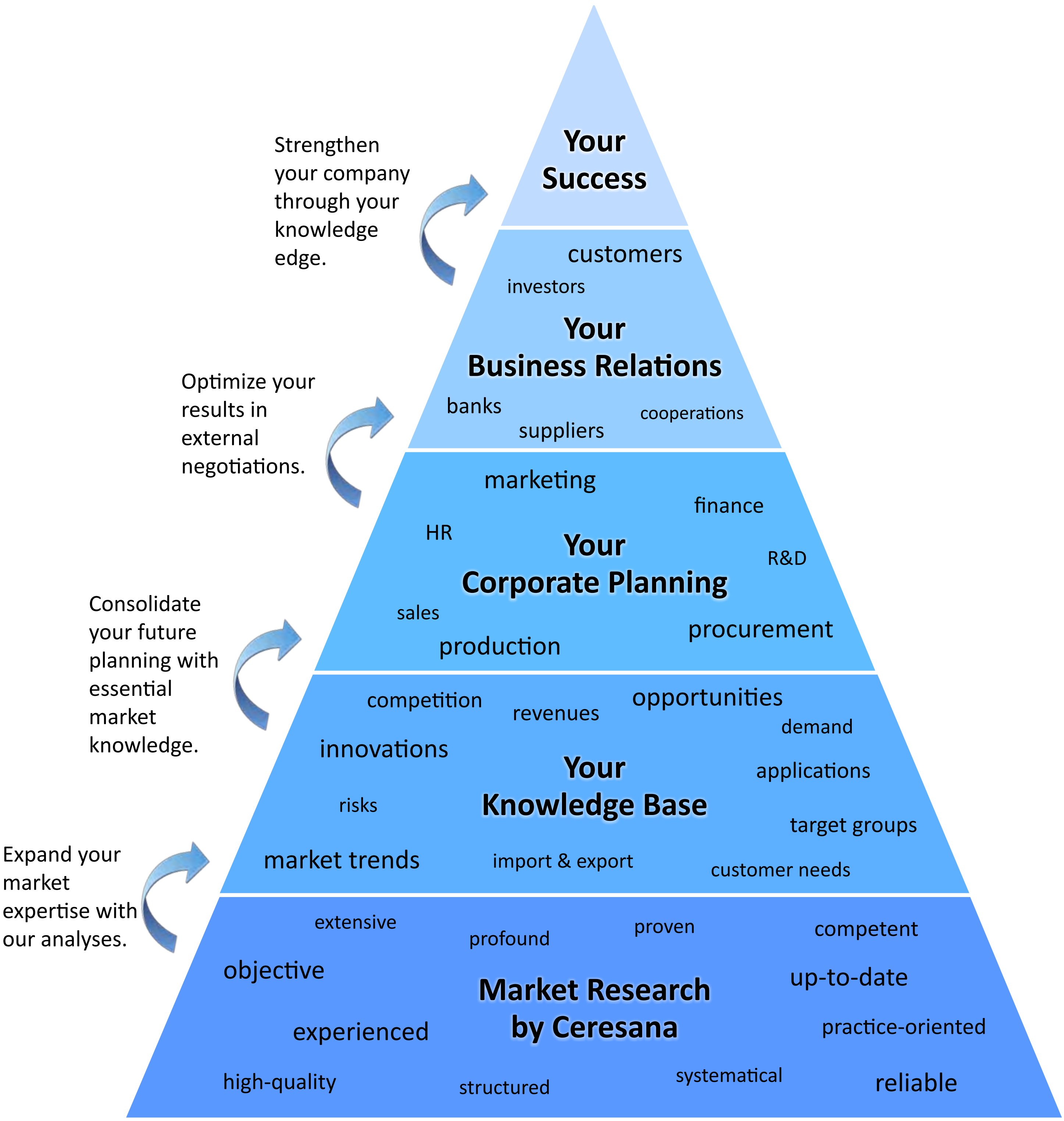

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