Market Study: Bags and Sacks - Europe (2nd ed.)

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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!

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- **Gain new customers**
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- **Recognize opportunities and risks**
  Identify opportunities & risks on your target markets in time

This study is especially useful for:

- Manufacturers and distributors of carrier bags, garbage bags, heavy duty sacks, big bags, pouch packaging such as stand-up pouches
- Suppliers of raw materials such as polyethylene, polypropylene, PVC, PET, paper, kraft pulp and additives like antioxidants or stabilizers
- Manufacturers and traders of plastic films, plastic strips, and paper fibers
- Executive board, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement

In this brochure you will find the following information:

- An introduction on page 3
- A summary of the table of contents on page 4
- Following this, there are example pages from the study
- Please use the form on the last page to easily order your study or a free reading sample!

In the case of the popular environmental issue of light-weight plastic carrier bags, first consequences of the EU directive 2015/720 can be observed: Most states of the EU have regulations to reduce the consumption of plastic bags. Carrier bags made of paper are frequently exempt from these regulations; their manufacturers could benefit from the EU directive. However, carrier bags make up only a small part of the total European market for bags and sacks that was analyzed already for the second time by Ceresana. The current study also examines, e.g., the development of heavy duty and industry sacks and of pouch packaging for foodstuffs. Ceresana expects the European market for bags and sacks to reach approx. 8.77 million tonnes until 2024.

Wafer-Thin Films

The study covers the European market for bags and sacks manufactured from polyethylene film, other plastic films, woven plastis, and paper. Polyethylene is by far the most frequently used material. However, individual materials may account for different market shares in various applications. This study divides the market into the segments carrier bags, garbage bags, heavy duty & industry sacks, food packaging, and "other applications".

Demand for More Commitment of Laggards

The implementation of the EU directive for the reduction of light-weight plastic carrier bags consumption has not been tackled equally consequently in all countries. Currently, the EU commission is addressing Greece, Italy, Poland, and Cyprus once again to dun a more determined implementation of the directive. The initial position and urgency are different from country to country: Therefore, the particular national circumstances and initiatives are discussed in the respective country profiles.

Positive Signals for Bioplastics

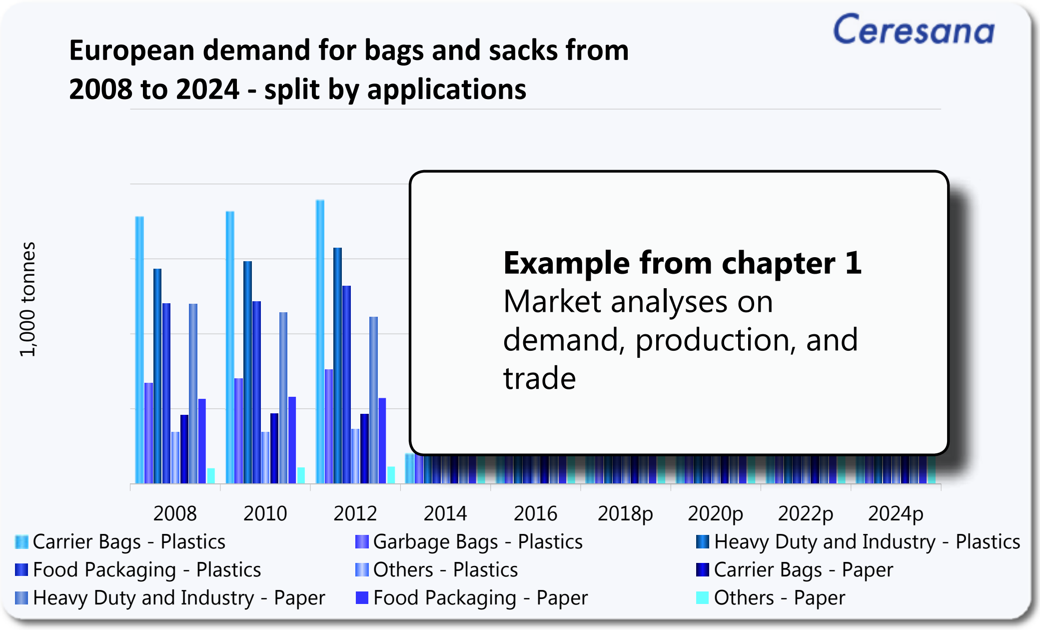
More and more countries, ban certain types of carrier bags already, or, with the aid of special taxes and fees, try to regulate the demand for several products. Usually, light-weight plastic carrier bags made of polyethylene are targeted by these initiatives. Carrier bags made of bioplastics are often exempt from these bans and fees. Bioplastics that are either made of renewable resources (e.g. corn starch) or at least are biodegradable. Importance and public reception of bags made of bioplastics have been increasing considerably in the past years. This becomes apparent by the fact that national legislators make explicit references to these products. In spring 2017, the EU commission once again commented positively on the use of bioplastics in packaging or carrier bags. Even if the market has developed very dynamically in the past years, bioplastics alone are not the ultimate and ecologically perfect solution propagated for a long time. Composting of bioplastics, e.g., does still not work flawlessly in the commonly used facilities.

Robust Sacks for Heavy Loads

Heavy duty and industry sacks have gained importance during the past years. Some segments have substituted conventional paper sacks by plastic sacks. In areas such as animal feed or construction materials, e.g. cement, paper sacks continue to play an important role, but given their good properties sacks made from polyethylene have the potential to gain additional market shares in the future. Yet, conventional heavy duty sacks made from plastic films are faced with increasing competition from "Flexible Intermediate Bulk Containers" (FIBC), in the segment bulk material. These FIBC are made from a stable plastic, often polypropylene, and can reach a capacity of up to 1,500 liters. They are often used as transport packaging for construction materials, fertilizers, grain or other bulk goods. Dynamics of the market for heavy duty sacks depends to a large extent on the economic development of the country as well as on the construction industry and the demand for construction material. These two factors are therefore examined closely in the corresponding country profiles.

Stand-Up Pouches

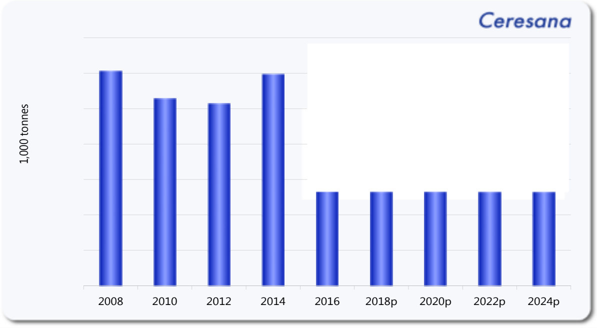
Mainly metal cans and glass jars are replaced by stand-up pouches. One advantage of flexible plastic pouches is the adaptation to the size of the packaged good, which helps to optimize the packaging size.


Ceresana
European demand for bags and sacks from 2008 to 2024 - split by applications
1,000 tonnes
Example from chapter 1
Market analyses on demand, production, and trade
2008
2010
2012
2014
2016
2018p
2020p
2022p
2024p
Carrier Bags - Plastics
Garbage Bags - Plastics
Heavy Duty and Industry - Plastics
Food Packaging - Plastics
Others - Plastics
Carrier Bags - Paper
Heavy Duty and Industry - Paper
Food Packaging - Paper
Others - Paper

1.21Spain

1.21.1 Demand

Demand for bags and sacks amounted to X tonnes in 2016.



Graph : Demand for bags and sacks in Spain from 2008 to 2024

Since 2013 the Spanish Department of the Environment has been implementing a strategy designed to continue to significantly decrease consumption of one-way plastic bags in the upcoming years. The ambitious goal is to considerably reduce the demand for these thin bags year by year and to take free one-way bags completely off the market by 2018. It has been discussed to introduce additional fees for certain products in order to achieve this objective. The aim is to render especially durable bags an attractive alternative and to raise a conscience for this topic. Consumption of carrier bags made of plastics is likely to continue to fall during the upcoming years. The tightened EU packaging directive 2015/720 will cause an additional decrease; as a consequence - earlier than requested by the EU - a minimum fee of 5 cents will be valid for each plastic carrier bag in the whole country starting January 2018. However, retailers have to claim up to 30 cents depending on the bag properties. Thin carrier bags with a wall thickness of less than 30 µm will cost at least 10 cents, unless they are biodegradable. Then, the minimum taxation of 5 cents applies. Thicker, reinforced carrier bags of over 50 µm will then be charged with 30 cents. The fee also depends on the composting properties of the respective carrier bag. Bags made of paper can...

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Carrier bags	X									
Garbage	X									
Heavy duty & Industry	X									
Foodstuffs	X									
Others	X									
Plastics total	**X**									
Carrier bags	X									
Heavy duty & Industry	X									
Foodstuffs	X									
Others	X									
Paper total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Chapter 1: Extensive market data on Europe and 23 countries:
- Demand split by material
- Demand on the largest markets split by applications
- Production split by plastic and paper, for the largest markets also split by plastic types
- Import and export, each split by plastic and paper

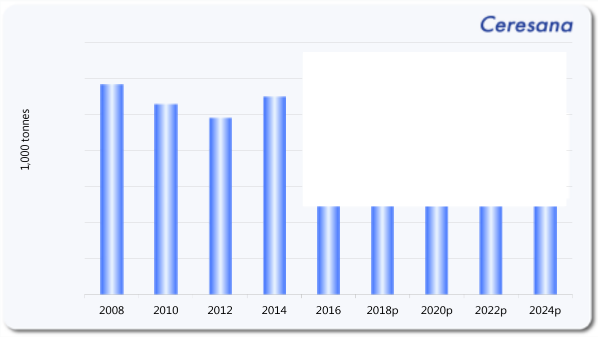
Table: Demand for bags and sacks in Spain from 2008 to 2024 – split by applications

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Polyethylene	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: Demand for bags and sacks in Spain from 2008 to 2024 – split by material

1.21.2 Production and Trade

About X tonnes of bags and sacks were manufactured in 2016. For the upcoming eight years, we forecast [...]



Graph: Production of bags and sacks in Spain from 2008 to 2024

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
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 Spain from 2008 to 2024 – split by material

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Import Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Import Paper	X	X	X	X	X	X	X	X	X	X% p.a.
Import Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**
Export Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Export Paper	X	X	X	X	X	X	X	X	X	X% p.a.
Export Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Import and export of bags and sacks in Spain from 2008 to 2024

2 Applications

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Carrier Bags	X	X								
Garbage	X	X								
Heavy Duty & Industry	X	X								
Foodstuffs	X	X								
Others	X	X								
Plastics total	**X**	**X**								
Carrier Bags	X	X								
Heavy Duty & Industry	X	X								
Foodstuffs	X	X								
Others	X	X								
Paper total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: European demand for bags and sacks from 2008 to 2024 – split by applications

Chapter 2: Extensive market data for Europe as a whole and the 8 largest European markets, split by plastic and paper in:

- Carrier Bags
- Garbage Bags and Sacks
- Heavy Duty and Industry Sacks
- Food Packaging
- Other Applications

2.4 Food Packaging

2.4.1 Plastics

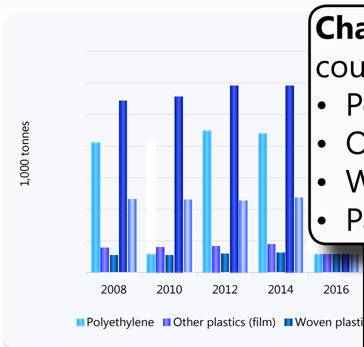
Pouch packaging becomes more and more popular in the retail sector. Mainly metal cans and glass jars are replaced, but sometimes also rigid plastic packaging. One advantage of flexible plastic pouches is that they can adapt to the size of the packaged good, which helps to optimize the packaging size. Also, this packaging can be manufactured in microwaveable varieties, a property that becomes increasingly important in the course of an increased focus on convenience products. Additionally, pouch packaging can be printed on increasingly better and they often are an eye-catcher at the POS.

For the purposes of this study, the application food packaging includes bags and sacks which are used to pack foodstuffs in retail quantities. Foodstuffs like flour or sugar are also packed and transported in heavy duty sacks. In these cases, they are no longer part of the application "food packaging", but "heavy duty and industry sacks". Therefore, the application "food packaging" in this study covers, e.g., bags for crisps (mainly made of polypropylene) or bags used to pack frozen foods such as vegetables or French fries (usually made of LDPE). It also includes special bags used to pack pasta, pre-baked goods, ready-made meals, dried fruits or salads. Also, the so-called t-shirt bags, supplied by food retailers to customers to pack loose fruit and vegetables or produce sold at service counters such as cold cuts, cheese and fish, are covered by this heading and are <u>not</u> part of the application "carrier bags".

in 1,000 tonnes	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016- 2024
Germany	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.
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.
Poland	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.
Spain	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.
Other 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 demand for bags and sacks in the segment plastic food packaging from 2008 to 2024 - split by countries

3. Materials



Graph: European demand for bags and sacks from 2

Chapter 3: Demand in 23 countries split by the materials:

- Polyethylene (Films)
- Other Plastics (Films)
- Woven Plastics
- Paper

3.2 Other Plastics (Films)

[...]In 2016, X tonnes of bags and sacks made of oth Europe. In the past eight years, demand thus rose a About X% of the European demand in 2017 origin strongest relative increases during the next eight European demand for bags and sacks made from o next eight years by an average of X% p.a. to approx. forecasting horizon.

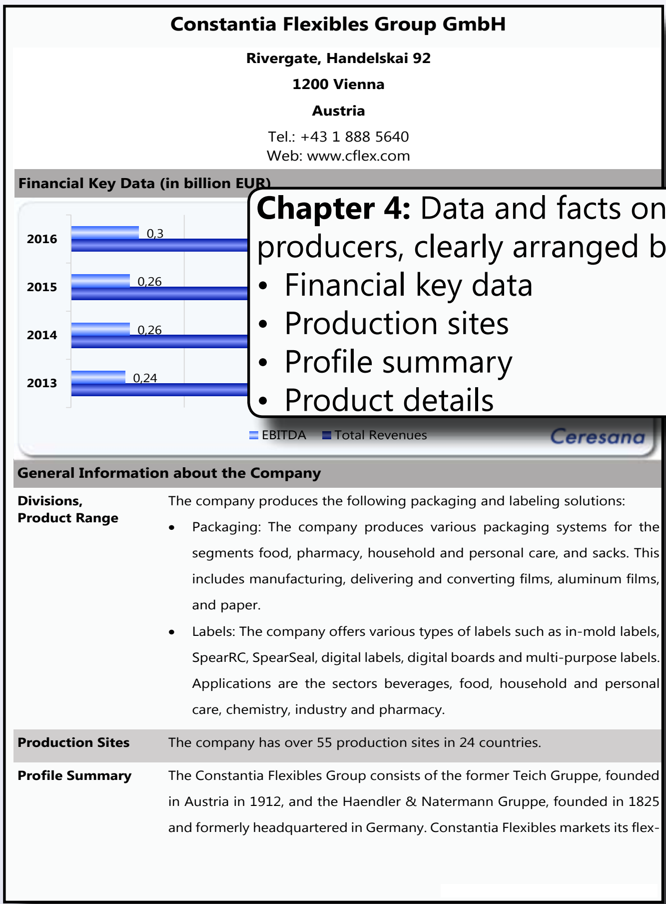
2.4.2 Paper

in 1,000 tonnes	2008	2010	2012	2014	2016	2018
Germany	X	X	X	X	X	
France	X	X	X	X	X	
United Kingdom	X	X	X	X	X	
Italy	X	X	X	X	X	
Poland	X	X	X	X	X	
Russia	X	X	X	X	X	
Spain	X	X	X	X	X	
Turkey	X	X	X	X	X	
Other Europe	X	X	X	X	X	
Total	**X**	**X**	**X**	**X**	**X**	

Table: European demand for bags and sacks in the seg from 2008 to 2024 - split by countries

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.
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.
Other 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 demand for bags and sacks made from other plastic films from 2008 to 2024 – split by countries



Constantia Flexibles Group GmbH

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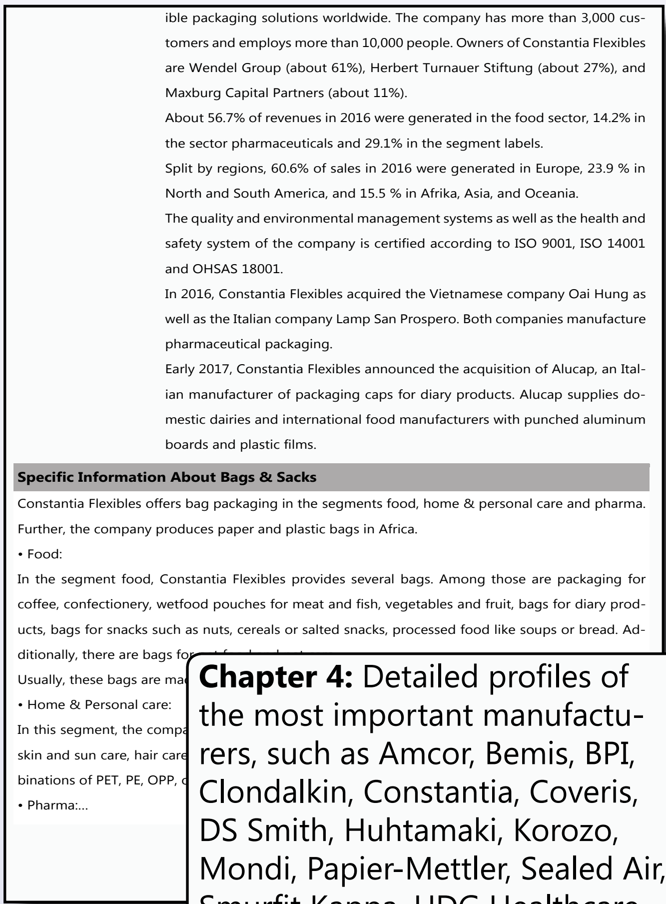
1200 Vienna
Austria
Tel.: +43 1 888 5640
Web: www.cflex.com

Financial Key Data (in billion EUR)

General Information about the Company	
Divisions, Product Range	The company produces the following packaging and labeling solutions: • Packaging: The company produces various packaging systems for the segments food, pharmacy, household and personal care, and sacks. This includes manufacturing, delivering and converting films, aluminum films, and paper. • Labels: The company offers various types of labels such as in-mold labels, SpearRC, SpearSeal, digital labels, digital boards and multi-purpose labels. Applications are the sectors beverages, food, household and personal care, chemistry, industry and pharmacy.
Production Sites	The company has over 55 production sites in 24 countries.
Profile Summary	The Constantia Flexibles Group consists of the former Teich Gruppe, founded in Austria in 1912, and the Haendler & Natermann Gruppe, founded in 1825 and formerly headquartered in Germany. Constantia Flexibles markets its flex-

Chapter 4: Data and facts on 74 producers, clearly arranged by:

- Financial key data
- Production sites
- Profile summary
- Product details



ible packaging solutions worldwide. The company has more than 3,000 customers and employs more than 10,000 people. Owners of Constantia Flexibles are Wendel Group (about 61%), Herbert Turnauer Stiftung (about 27%), and Maxburg Capital Partners (about 11%).

About 56.7% of revenues in 2016 were generated in the food sector, 14.2% in the sector pharmaceuticals and 29.1% in the segment labels.

Split by regions, 60.6% of sales in 2016 were generated in Europe, 23.9 % in North and South America, and 15.5 % in Afrika, Asia, and Oceania.

The quality and environmental management systems as well as the health and safety system of the company is certified according to ISO 9001, ISO 14001 and OHSAS 18001.

In 2016, Constantia Flexibles acquired the Vietnamese company Oai Hung as well as the Italian company Lamp San Prospero. Both companies manufacture pharmaceutical packaging.

Early 2017, Constantia Flexibles announced the acquisition of Alucap, an Italian manufacturer of packaging caps for diary products. Alucap supplies domestic dairies and international food manufacturers with punched aluminum boards and plastic films.

Specific Information About Bags & Sacks

Constantia Flexibles offers bag packaging in the segments food, home & personal care and pharma. Further, the company produces paper and plastic bags in Africa.

• Food:

In the segment food, Constantia Flexibles provides several bags. Among those are packaging for coffee, confectionery, wetfood pouches for meat and fish, vegetables and fruit, bags for diary products, bags for snacks such as nuts, cereals or salted snacks, processed food like soups or bread. Additionally, there are bags for ...

Usually, these bags are ma...

• Home & Personal care:

In this segment, the compa... skin and sun care, hair care... binations of PET, PE, OPP, ...

• Pharma:...

Chapter 4: Detailed profiles of the most important manufacturers, such as Amcor, Bemis, BPI, Clondalkin, Constantia, Coveris, DS Smith, Huhtamaki, Korozo, Mondi, Papier-Mettler, Sealed Air, Smurfit Kappa, UDG Healthcare, and Vicat.

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- ☐ Hydrofluoric Acid & Fluorochemicals
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- ☐ Plasticizers
- ☐ Propylene - World
- ☐ Propylene - China
- ☐ Propylene - USA
- ☐ Solvents
- ☐ Stabilizers
- ☐ Styrene
- ☐ Surfactants
- ☐ Titanium Dioxide
- ☐ Toluene
- ☐ Urea
- ☐ Xylene

Plastics
- ☐ Bioplastics
- ☐ Composites
- ☐ Compounds
- ☐ Engineering Plastics
- ☐ Expandable Polystyrene
- ☐ Masterbatches
- ☐ Plastics - Europe
- ☐ Plastics - World
- ☐ Polyamide - PA6 & PA66
- ☐ Polyethylene - HDPE
- ☐ Polyethylene - LDPE
- ☐ Polyethylene - LLDPE
- ☐ Polypropylene
- ☐ Polystyrene
- ☐ Polyurethanes & Isocyanates
- ☐ Polyvinyl Chloride
- ☐ Silicones
- ☐ Synthetic Rubber
- ☐ Thermoplastic Elastomers

Industry
- ☐ 3D Printing - World
- ☐ Adhesives - Europe
- ☐ Adhesives - World
- ☐ Automotive Plastics - World
- ☐ Bitumen - Europe
- ☐ Construction Plastics - World
- ☐ Doors & Windows - Europe
- ☐ Insulation Materials - Europe
- ☐ Insulation Materials - World
- ☐ Paints & Varnishes - Europe
- ☐ Paints & Varnishes - World
- ☐ Pipes - Europe
- ☐ Plastic Extrusion - World
- ☐ Plastic Injection - World
- ☐ Plastic Pipes - Europe
- ☐ Plastic Pipes - World
- ☐ Plastic Windows - World
- ☐ Printing Inks - World

Packaging
- ☐ Bags & Sacks - Europe
- ☐ Bags & Sacks - World
- ☐ Caps & Closures - Europe
- ☐ Corrugated, Solid Board & Carton - Eur.
- ☐ Flexible Packaging - Europe
- ☐ Food Packaging - Europe
- ☐ Labels - Europe
- ☐ Plastic Bottles - Europe
- ☐ Plastic Caps & Closures - Europe
- ☐ Plastic Caps & Closures - World
- ☐ Plastic Containers - World
- ☐ Plastic Films - Europe
- ☐ Plastic Films - World
- ☐ Rigid Metal Packaging - Europe

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