

Development of packaging consumption of plastic films according to industrial sectors

Evaluation of the German market 2009, forecast 2014

GVM Gesellschaft für Verpackungsmarktforschung mbH

READING SAMPLE

Market study on plastic films

Objective of the survey:

> Evaluation of the German market, 3rd edition

> Data base:

- Filling good oriented market research approach
- Results of survey addressing the packaging industry
- 2009 / forecast 2014
- 21 industrial sectors

> Contents:

- Consumer trends
- Market relevance of mono films versus multi layer films
- Market structure of multi layer films
- Industrial sectors where laminates are used
- Substitution processes of laminate groups and types
- Product innovations

Current market study: 21 relevant industrial sectors

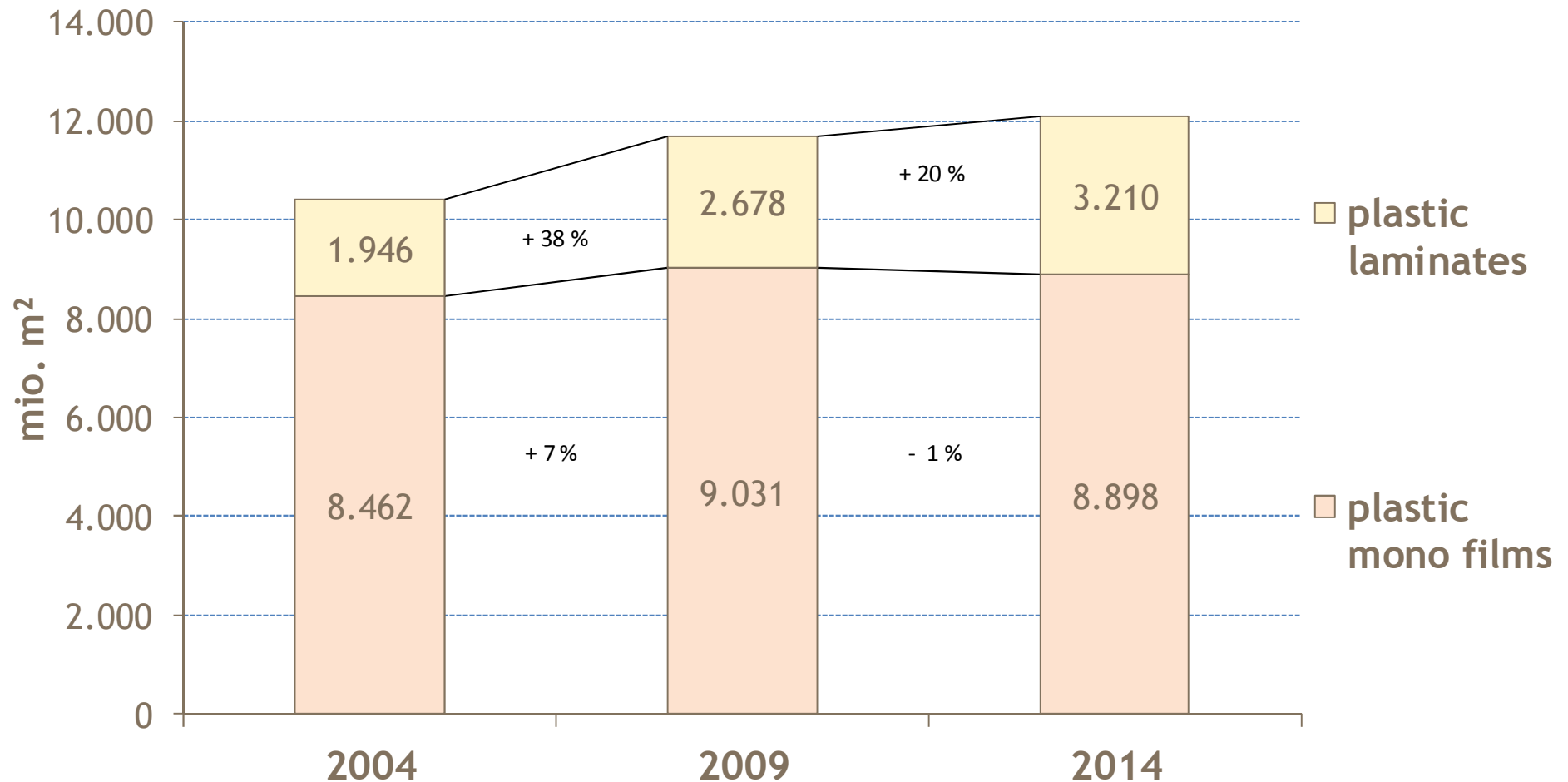
Industrial sectors	
Dairy products	Preserved food
Fats and oils	Fruits and vegetables (fresh)
Beverages	Frozen foods, ice cream
Coffee, cocoa, tea	other food
Snack products	Service packaging
Confectionery	Washing and cleaning products
Chilled convenience food	Cosmetics, body care products
Soups, sauces, seasonings	Animal feed, cat litter, other farming products
Baby food	Orthopedic, medical and pharmaceutical products
Breads, cakes, pastries	Building materials and chemical products
Meat, sausage products and fish (fresh, smoked)	

Current market study: overview plastic films

plastic groups	plastic types
Mono, flexible	Polyolefines
	Biopolymers
	Other plastic
Mono, deep-drawn	Polyolefines
	Biopolymers
	Other plastic

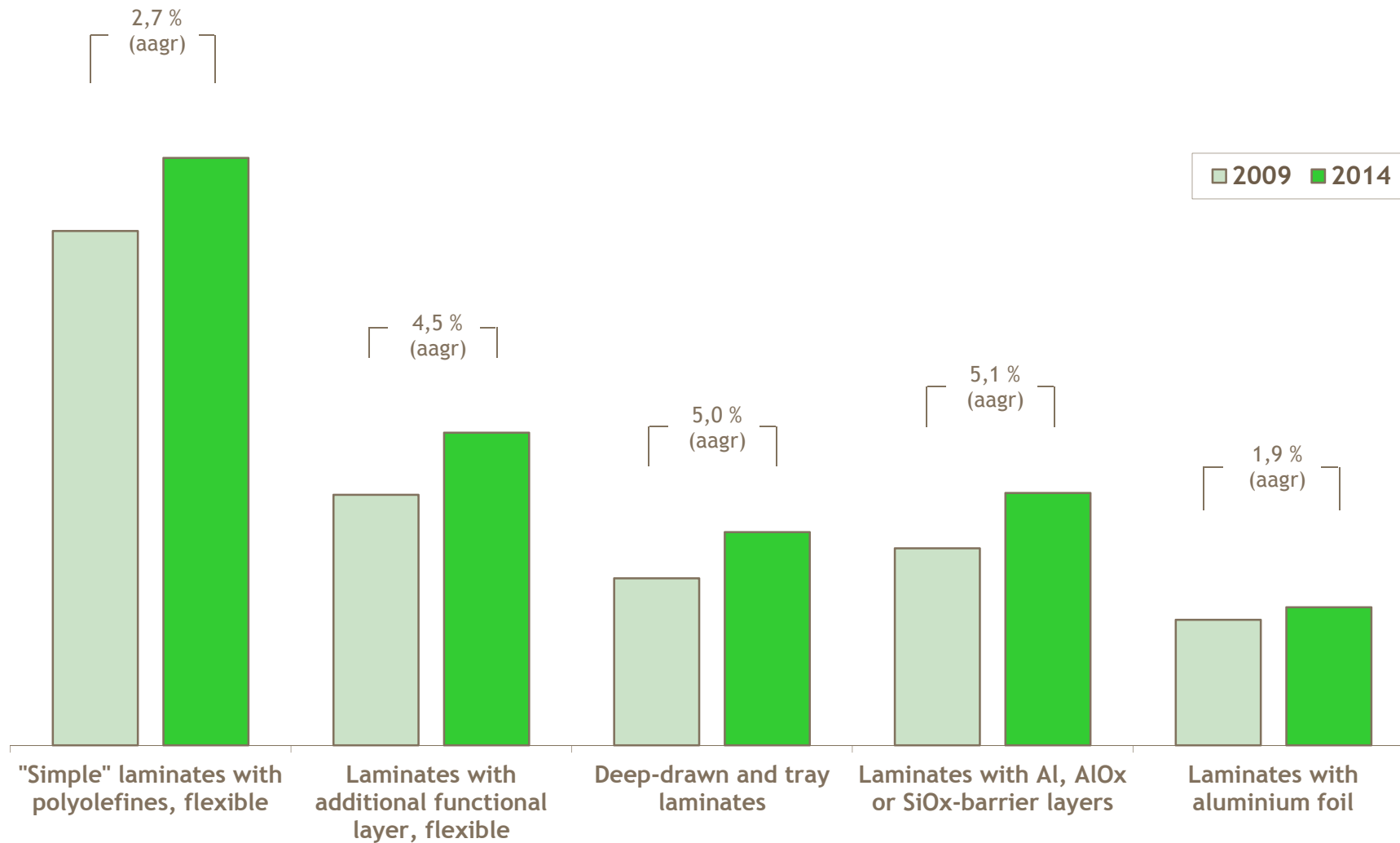
plastic groups	plastic types
"Simple" laminates with polyolefines, flexible	PA / Polyolefines
	PET / Polyolefines
	PP / Polyolefines
	PVC / Polyolefines
	Other / Polyolefines
Laminates with additional functional layer, flexible	EVOH
	PVDC
	Other functional layers
Deep-drawn and tray laminates	Layer / PS
	Layer / PP
	Layer / foamed plastic
	PVC / Polyolefines
	PA / Polyolefines
	PET / Polyolefines
	Biopolymers / plastic
	Other
Laminates with Al, AlOx or SiOx-barrier layers	PET / layer / Polyolefines
	BOPP / layer / Polyolefines
	BOPA / layer / Polyolefines
	Biopolymers / layer
Laminates with aluminium foil	Polyolefines / aluminium / plastic
	PET / aluminium / plastic
	Other plastic / aluminium laminates

Development of retail packaging consumption of plastic films in Germany



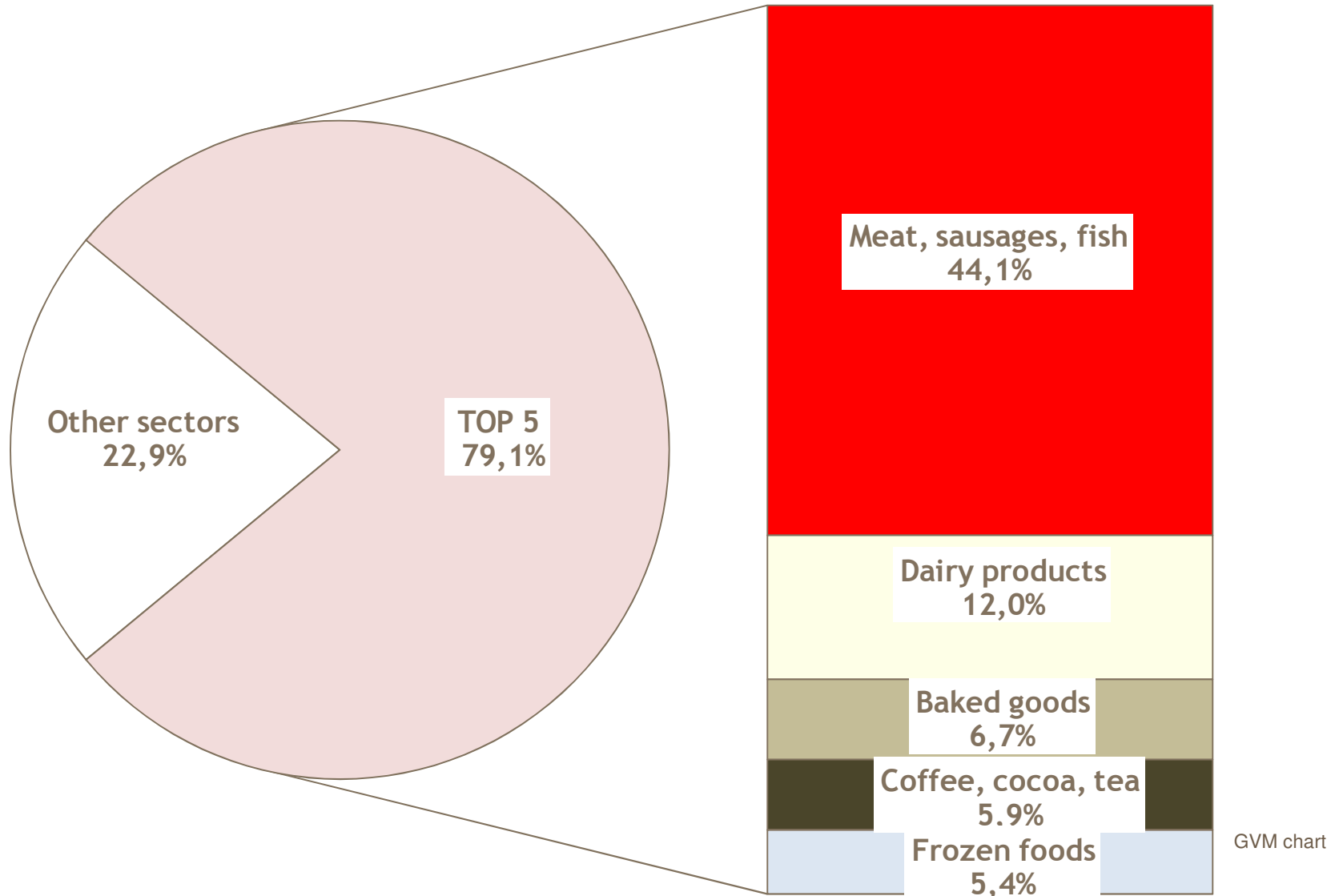
Consumption development of groups of flexible plastic laminates 2009 / 2014 in mio. m²

aagr = average annual growth rate

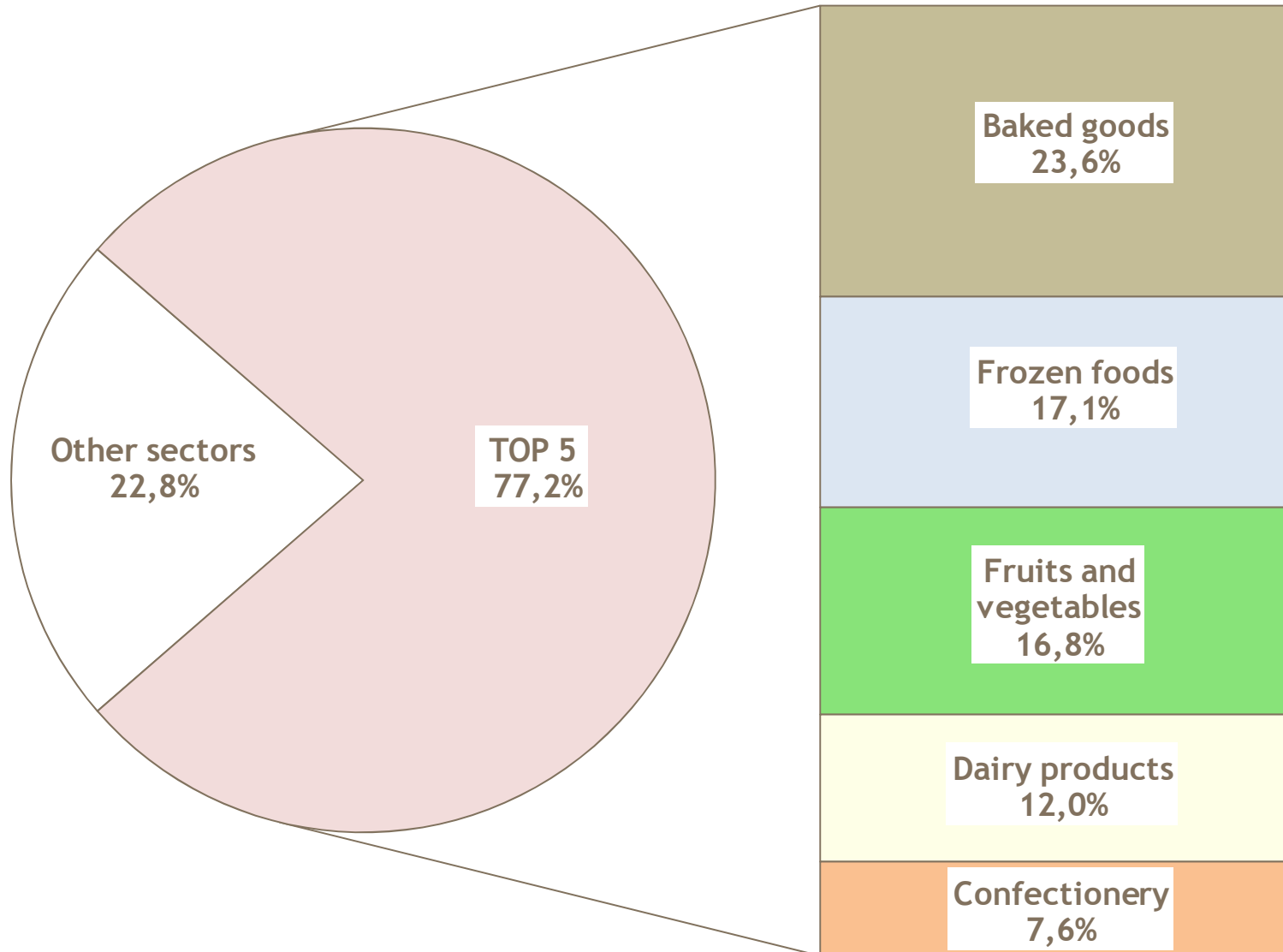


GVM chart

The 5 most important food sectors for plastic laminates - surface reference forecast 2014



The 5 most important food sectors for mono films - surface reference forecast 2014



GVM chart

Selected plastic film trends

Trend 1: Multilayer films are more dynamic than mono films

Trend 2: There is a trend to Biopolymers

Trend 3: PVDC is declining

Trend 4: The demand for EVOH as barrier layer is still high

Trend 5: Deep-draw applications are increasing

Trend 6: Metalized films replace only partly aluminium laminates

Trend 7: High demand for transparent packaging

- > Important trends that influence the development of packaging consumption are directly related to changing **consumer demands and desires**.
- > **(Premium) convenience products count are among the strongest growing food sector: Anything that will make life more enjoyable will win.**
- > The continuous diversification of multilayer films is based on the increasing variety of demanded functionalities.
- > In the future the requirements for plastic films are becoming more and more complex.

How will future markets developed?

GVM offers reliable figures for future-oriented decisions.

For further information please contact us: info@gymonline.de