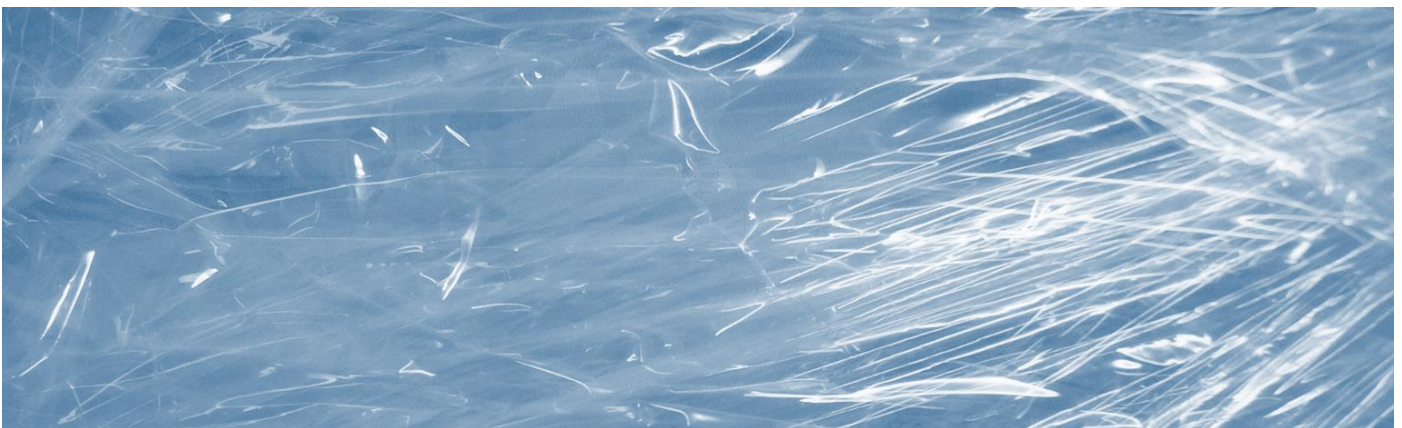


Market Report

Flexible Plastic Packaging Market in Germany and in Europe



Trends and Perspectives until 2021 by Product Categories

Mainz, December 2016

Is the rising demand for plastic film composites coming to a halt?

The European market for fast moving consumer goods (FMCG) is largely saturated and has limited growth rates. For the most part, growth is only possible by product differentiation and increased product diversity.

Packaging design is an important aspect for a product's performance at the point of sale.

Producers, fillers and retailers want to develop simple and cost-efficient packaging solutions with films that have optimal functionalities. At the same time, the perceived eco-friendliness of packaging is of growing importance.

This report describes trends and provides a market overview on flexible sales packaging in Germany and in Europe and emphasizes the different types of plastic composites.

Objective and methodology

The analysis of the German market is based on our detailed **GVM-database** Market Volume Packaging and the deep expertise of our market analysts. In addition to that, the European market volume draws on extensive market research based on **international data** and information.

The presented trends are the result of our latest **survey of decision makers and consultants** in the plastics industry. The report treats key topics of the market development and important factors for packaging design like socioeconomic parameters, the legal situation and requirements by fillers and retailers. Differences between the German and European market are highlighted and the data offers a forecast to the year 2021.

Management Summary

The report helps decision makers to evaluate industry sectors, trends and development potentials for flexible plastic composite packaging, especially with regards to the **substitution** of monofilms.

By contrasting the German and the European market development you will get a comprehensive overview of regional key differences until 2021.

Overview of the analyzed film types

| Film sub-classification | Film type |
|---|---|
| Monofilm | Conventional plastic |
| | Biopolymers |
| Plastic/plastic composites without barrier layer, flexible | PA / polyolefins |
| | PET / polyolefins |
| | PP / polyolefins |
| | Other plastic / plastic |
| Plastic/plastic composites without barrier layer, thermoformed | PA / polyolefins |
| | PET / polyolefins |
| | PP / polyolefins |
| | PVC / polyolefins |
| Plastic/plastic composites with organic barrier layer, flexible | Plastic / EVOH / plastic |
| | Plastic / other organic barrier / plastic |
| Plastic/plastic composites with organic barrier layer, thermoformed | PA / EVOH / plastic |
| | PP / EVOH / plastic |
| | Plastic / organic barrier / plastic |
| Metallized film, film with coatings based on AlOx- or SiOx | PET / layer / polyolefins |
| | PP / layer / polyolefins |
| | PA / layer / polyolefins |
| Plastic/plastic composites with aluminum foil | Polyolefins / aluminum / plastic |
| | PET / aluminum / plastic |
| | Other plastic / aluminum / plastic |

What is your benefit?

- Cost-effective market data and forecasts on the development of flexible plastics packaging in Germany and Europe, especially focused on plastic composites.
- Strategic decision aid for your business development due to profound market analysis
- Early detection of trends for flexible packaging
- Detailed analysis differentiated by 7 film sub-classifications and 22 film types
- Description, quantification and forecast of flexible plastic composites by 15 product categories, which is unique in the industry.

Key Questions

- What are the factors for material development?
- How will the product categories evolve?
- Which markets are growing? Which markets are declining?
- What is the market volume in 2016? How will it change until 2021?
- How does the German market for flexible packaging differ from the European market with regards to
 - The structure of plastic film classifications and types,
 - The market growth of plastic film types,
 - The packaged product categories?

30 countries are subsumed under the European region

| | | |
|----------------|----------------|-------------|
| Austria | Finland | Latvia |
| Belgium | France | Malta |
| Bulgaria | United Kingdom | Netherlands |
| Switzerland | Greece | Norway |
| Cyprus | Croatia | Poland |
| Czech Republic | Hungary | Portugal |
| Germany | Ireland | Romania |
| Denmark | Italy | Sweden |
| Estonia | Lithuania | Slovenia |
| Spain | Luxembourg | Slovakia |

Product categories

| |
|--|
| Sweets, snack products |
| Coffee, tea, cocoa |
| Dairy products |
| Bakery Products |
| Meat, meat products, fish |
| Chilled convenience food and ready meals |
| Conserved food |
| Frozen food, ice cream |
| Nutriments, instant dry products, other dry products |
| Other liquid and pasty food (incl. beverages) |
| Pet food, pet supplies |
| Detergents, cleaning agents, personal care |
| Medical and pharmaceutical products |
| Service packaging |
| Other non-food products |

Target Groups

The report is aimed at:

- > Plastic producers
- > Film producers
- > Packaging producers
- > Fillers
- > Packaging engineering companies
- > Other companies with demand for data on flexible plastic packaging.

Surface area of plastic composites in Germany 2016 by product categories

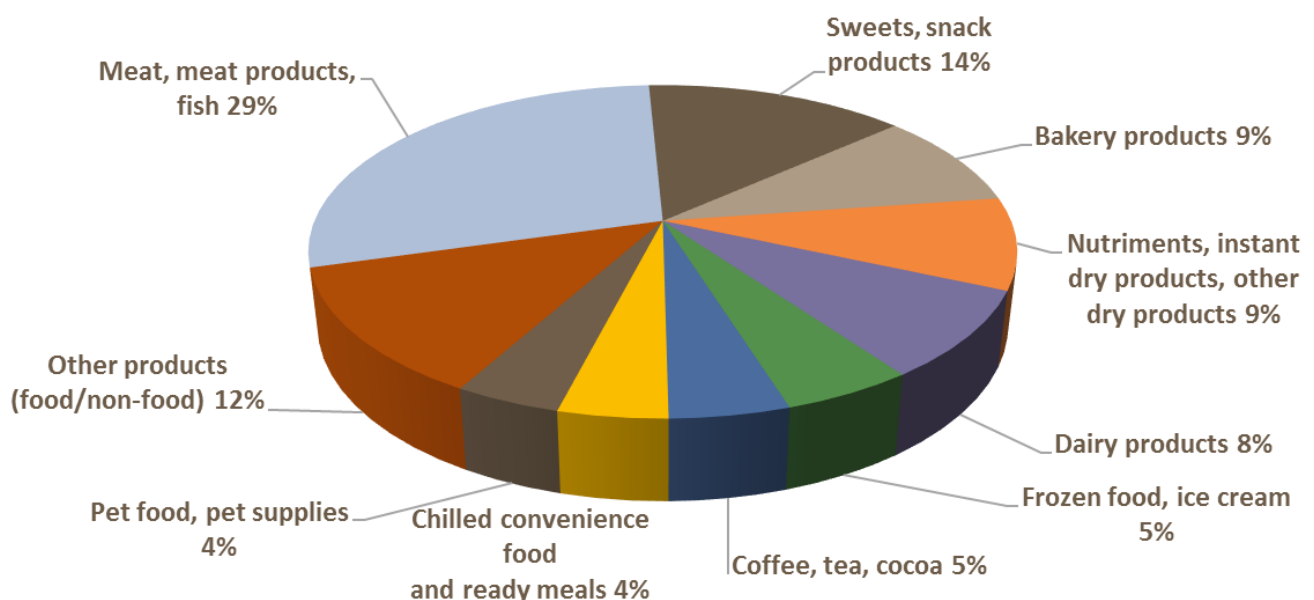




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We are a B2B-Market research institute specialized on the topic of packaging. Long-time expertise and constant data collection allow us to supply reliable figures for future oriented decisions. We cover all issues across all industries for B2B packaging and emphasize on the areas food, beverages and FMCG. We implement projects for you at all economic levels - throughout the entire German market, with regard to individual markets and industries or at the level of individual companies.

In order to be able to answer your questions as comprehensively and reliably as possible we use all available instruments and methods. Our longstanding experience in diverse projects and markets as well as numerous established contacts in the industry, trade associations and science lead to profound results. Our continuously updated database GVM Market Volume Packaging is an invaluable tool for efficient research and helps generate unique insights.

For more information on GVM please follow the link www.gvmonline.de

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