

PRESS RELEASE

New business models, technologies and verticals support European thin wall packager growth

European thin wall packaging consolidation continues and in 2022, the top 10 producers accounted for almost half of the market based on polymer throughput. Whilst their market share has not grown substantially over the past decade, leading producer market share in terms of capturing market value has increased at a faster rate. Aside from consolidating, the leading European thin wall packaging producers have been expanding their capabilities, venturing into new business areas, and have become a more prominent feature in the packaging space. Outside the top producers, the market remains fragmented, with AMI identifying more than 1,000 companies producing sheet and/or thermoforming and/or injection moulding thin wall containers across Europe. Barriers to entry remain low and success translates into strong technical competence, the ability to provide high quality products and value-added services cost-competitively, and the ability to deliver on sustainability.

Customer commitments on plastic packaging including reducing usage, increasing recycled content and developing biodegradable or non-plastic-based solutions, has seen the packaging value chain adapt in support of these goals. Although packaging is essential in preserving and maintaining product quality, it is also key in reinforcing brand identity and is important, particularly for leading brands, to be seen to be leading the transition to more sustainable solutions. Without a clearly defined sustainability strategy and packaging disposal options, the reputation of leading brands risks being tarnished through unsustainable and unrecyclable packaging, and they are seeking partnerships with suppliers able to support them in their sustainability transition.

The growing body of legislation increasingly mandating recycled content levels has pushed demand for plastic packaging with recycled content to an all-time high and continues to grow. Yet access to material remains challenging. Greater numbers of thin wall packaging producers are seeking out and investing in their own recycling facilities and collaborations to secure better access to recycled material, but current progress remains insufficient to meet future demand. Although the thin wall packaging value chain has developed sustainability strategies, invested in acquisitions and collaborations in support of these strategies, and remains committed to ensuring that their products are not only recyclable but have also played a key role in developing recycling streams for their products where these do not exist, this needs to accelerate and start delivering at scale to deliver on legislative targets and meet upcoming requirements.

The latest edition of AMI's highly regarded [Thin Wall Packaging in Europe](#) report is the result of an extensive research program, providing a detailed independent assessment of this industry in times of uncertainty. The report quantifies resin demand for thin wall packaging by country, polymer and production method (extrusion thermoforming / injection moulding). This authoritative study highlights the development of the market for thin wall packaging over the past five years (2017-2022), how it is responding to sustainability pressures, and how the market is likely to develop over the next five years to 2027.

For further information contact

Packaging Consultant

E / susannah.owen@amiplastics.com

For sales contact

Sales Manager

E / brian.hinchliffe@amiplastics.com