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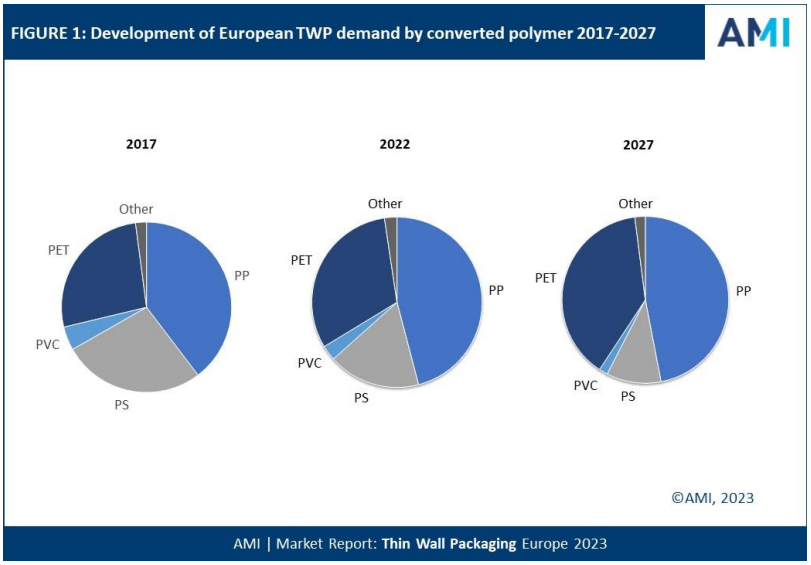
PRESS RELEASE

Sustainability changing the European thin wall packaging landscape

AMI has published its latest authoritative report mapping the European Thin Wall Packaging industry. The report aims to support the development of robust participation strategies by equipping industry players and investors with a comprehensive understanding of scale of potential for future development, growth dynamics, market drivers and competitive pressures.

In 2022, 3.4 million tonnes of polymer were consumed in the manufacture of thin wall packaging in Europe, a CAGR of +1% since 2017. Yet as the industry approaches the sustainability milestone of 2025, growth in polymer demand for thin wall packaging is expected to stagnate and the materials and formats used continue to change. Certain end-use markets are under intense pressure from plastics bans and alternative packaging substrates, and lightweighting and plastics reduction initiatives continue to affect overall polymer consumption.



Sustainability has become the main driver of thin wall packaging development. Although retailers and brand owners continue to innovate to offer consumers convenience solutions, the focus has shifted to providing more sustainable packaging formats with value chain collaboration to improve circularity, to address the growing body of sustainability legislation, and to improve pack format in the eyes of the consumer.

PET has the advantage of a well-established rPET chain, growing Tray2Tray developments, food contact approvals, and enjoying significant R&D focus. The polymer continues to make in-roads in European thin wall packaging with injection moulding, active barrier solutions and hot-fill developments just some of the innovations underway. PP and PS have challenges to deliver sufficient quantities of recyclate, demanded by converters and now mandated by legislation although efforts are accelerating throughout the value chain. Although PP remains the most widely used polymer in the manufacture of thin wall packaging aided by its

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versatility across different processing technologies and across many end-uses, significant volumes of thin wall packaging have yet to be designed for recycling. Technology now exists to produce recycled food-grade PP, but the industry is still catching up with more established food grade PET recycling. That being said, things are moving in the right direction with developments in smart sorting technology partially solving some issues. While PS demand remains sizeable thanks to its widespread use in chilled dairy where is remains difficult to cost-effectively replace, PS's share of the market continues to be eroded with new developments and product launches favouring alternative materials.

AMI expects the European thin wall packaging landscape to continue transforming in favour of materials and solutions perceived as more sustainable. This includes hybrid solutions, able to combine the functionality of plastics with the superior branding and image of fibre-based packaging, developments in PET injection moulding, mono material barrier solutions, IML and many more. Industry development also remains reliant on availability of mechanically and chemically recycled material, and bio-sourced material, which remains acute.

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.

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