



**Euromonitor
International**

Flexible Packaging in Western Europe

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Key findings

REGIONAL OVERVIEW

Western Europe remains the second biggest regional market for flexible packaging

Stand-up pouches the most dynamic flexible packaging pack type over 2018-2023

Pandemic boosts sales in 2020 but inflation results in declining unit volumes in 2022

Flexible plastic the dominant pack type in flexible packaging

Flexible plastic adds a lot of new units in Turkey over 2018-2023

Plastic pouches the most dynamic performer in a number of countries

Flexible plastic adds the most new units in Western Europe over 2018-2023

Lightweight nature in transportation and resource efficiency speak for flexible packaging

LEADING COMPANIES AND BRANDS

Packaged food remains the leading user of flexible packaging in Western Europe

Packaged food categories dominate the usage of flexible plastic

Tea and coffee the biggest users of flexible paper after the food categories

Aluminium/plastic pouches the leading pack type in wet cat food

Food dominates closures in flexible packaging

Zip/press closures enjoying increasing usage over 2018-2023

Larger pack sizes popular in dog and cat food and home care

Small households and on-the-go consumption boost demand for smaller packs in food

FORECAST PROJECTIONS

Turkey to see the strongest growth and add the most new packaging units

Aluminium/plastic pouches expected to see dynamic growth in Turkey

Turkey leads in terms of flexible packaging usage in beverages

Flexible paper expected to gain share in green tea in Germany

Strong growth expected for flexible packaging in Turkey over 2023-2028

Blister and strip packs a key flexible packaging format in beauty and personal care

UK will remain the biggest market for dog and cat food flexible packaging

Continued growth expected for plastic pouches in the UK

France to overtake Germany as biggest market in the 2023-2028 period

Home care industry focuses on sustainability issues

COUNTRY SNAPSHOTS

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

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Turkey: Competitive and Retail Landscape

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