

## Press release

### Slight decline in tube deliveries in the first half of 2024

#### European tube market takes a break from growth

The European tube market was somewhat weaker in the first half of 2024. The European tube manufacturers association (etma) reported a decline in deliveries of 1 per cent to a total volume of around 6 billion units.

The three tube types developed differently. While demand for aluminium and plastic tubes fell by around 2 percent, deliveries of laminate tubes increased by just under 2 percent. Looking at the individual sales markets, deliveries to the dental care, household and food sectors increased, while demand from the pharmaceutical and cosmetics sectors, which are stronger in terms of volume, declined.

'Overall, tube producers have quickly adapted to the slight downturn of demand in the first half of 2024 and are satisfied with the steady average growth on a three-year basis. We have therefore returned to a degree of normality,' emphasizes etma President Zoran Joksic.

#### Stabilisation of supply chains amid persistent bottlenecks in recycling materials

Compared to the coronavirus crisis, supply chains in the industry have now stabilised again. The availability of primary materials has improved significantly. However, given the tight supply situation, there is still fierce competition for high-quality recycled materials in order to fulfil customer requests for more recycled content in packaging.

'For plastic packaging in particular, we need a further push for mechanical recycling facilities across Europe, a destigmatisation of chemical recycling for complex composites and predictable political guidelines so that the necessary investments in recycling capacities and closing the supply gap can be realised,' says Joksic.

#### Better outlook for 2025

While the situation on the commodity and energy markets has eased further, the situation regarding labour costs and the availability of skilled workers remains tense. Inflation is on the decline, but consumers' spending mood remains subdued despite rising purchasing power.

'The multiple crises worldwide are encouraging European consumers to stay prudent, even though the packaging industry has always proven to be very resilient in crisis times in the past. The current situation is not affecting the strategy of tube manufacturers who expect new growth for the year 2025,' summarizes Joksic.

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Contact:  
Gregor Spengler  
Manager Packaging in Aluminium Deutschland e. V. (AD)  
etma Secretary General