

Press release

Slight decrease of deliveries of tubes in 2024

European tube market takes a breather

Deliveries by tube manufacturers organised in the European Tube Manufacturers Association (etma) went down by 1.3 per cent to a total volume of roughly 11.5 billion units in 2024.

The most important end user markets developed differently. While deliveries to the dental care, food and household sector increased by about 9 per cent, 3 per cent and 10 per cent, demand from the volume-wise dominant pharmaceutical and cosmetics markets both fell by around 2 per cent and 8 per cent.

"In 2024 consumer uncertainty caused by persistent inflation and the ongoing wars in Ukraine and Gaza led to negative sentiments and an increased savings behaviour among consumers. This also had a noticeable impact on demand for cosmetics which is the most important end user market for the flexible tubes industry. Moreover, there was a certain shift of demand to the private label sector due to consumers' shrinking buying power," says etma President Zoran Joksic.

Trend towards less complex packaging structures

The provisions of the recently published EU Packaging and Packaging Waste Regulation (PPWR) are clearly aiming at increasing the recyclability of packaging and improving design for recycling. Especially the ambitious recyclability performance grades will most probably trigger a push to less complex, mono-material packaging structures. The packaging industry must rise to this challenge and offer innovative packaging solutions to achieve the best possible recyclability performance.

The PPWR also stipulates ambitious requirements for minimum recycled content in plastic packaging. "This will be a big challenge for the plastic packaging industry. The competition for high quality post-consumer recycling material will become even fiercer. In this context, further investments in the infrastructure for material and chemical recycling of plastic packaging and bigger efforts of EFSA to authorize recycling processes for polyolefins for food contact materials are paramount," says etma Secretary General Gregor Spengler.

Moderate outlook for the first half of 2025

Due to the ongoing difficult political and economic conditions, the European tube industry expects an at best stable demand in the first half of 2025.

"One positive aspect is that the availability of labour has slightly improved in those countries where other relevant industries are suffering and laying off workers. The packaging industry which has proved to be very resilient to cyclical changes in the economy, has become a kind of "safe haven" for employees.

This is good news because in the medium term, it will be one of the most important strategic challenges for tube producers to make sure that the know-how of the boomer generation which is gradually leaving the companies is properly transferred to the next generation," summarizes Zoran Joksic.

Düsseldorf, 26 February 2025

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