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Press release

Europe's Tube Manufacturers Report Weaker Market in the First Half of 2025

Decline in overall deliveries, mixed performance across tube types

The tube market recorded a weaker performance in the first half of 2025. According to the European tube manufacturers association (etma), global deliveries of aluminium, laminate and plastic tubes fell by 3.9% to around 5.8 billion units compared to the same period in 2024.

The individual tube types developed differently:

- **Aluminium tubes:** With deliveries of almost 2 billion units, the aluminium tube market declined by 4.8%. While demand from the food sector remained stable and cosmetics even saw a slight increase, the significant drop in pharmaceutical deliveries — the largest application segment — was the decisive factor behind the overall decline.
- **Laminate tubes:** Deliveries rose to almost 2.36 billion units, a 3.6% increase over the previous year. Growth was particularly strong in the toothpaste and pharmaceutical markets.
- **Plastic tubes:** At around 1.47 billion units, deliveries fell sharply by 12.8%. The decline was mainly due to significantly lower demand from the cosmetics sector, especially for smaller diameter tubes.

Recycled raw materials, trade uncertainty and policy pressure remain challenges

The use of post-consumer recycled (PCR) materials remains a top priority for the industry, but availability is still limited, particularly in the plastics sector. This continues to slow down the transition towards higher recycled content in packaging.

In addition, the global trade environment is becoming increasingly volatile. The recently announced US tariffs of 50% on aluminium tubes, coming into effect in August 2025, are creating new uncertainties for the industry and adding pressure on international supply chains.

Resilient industry with cautious optimism

“The first half of 2025 has shown once again that our industry is both challenged and resilient. Despite weaker demand in some key markets, particularly pharmaceuticals and cosmetics, we continue to see growth impulses in other sectors and tube types. The resilience of our members and their continued investments in innovation and sustainability make us cautiously optimistic for the remainder of 2025” emphasizes etma’s President Zoran Joksic

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