

IAL MARKET GUIDE

**THE WEST EUROPEAN MARKET
FOR OPP FILM**

**© IAL CONSULTANTS
FEBRUARY 2001**

109 Uxbridge Road, Ealing, London W5 5TL
Tel: +44 (0) 20 8810 0919 Fax: +44 (0) 20 8566 4931
Email: ial@brg.co.uk
Web site: www.ialconsultants.com

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

NOTE

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many IAL reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of IAL Consultants to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

MORE INFORMATION ON IAL CONSULTANTS

At the end of this report you will find a copy of our corporate brochure and a list of our latest published reports. Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all IAL Consultants published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website :

www.ialconsultants.com

CONTENTS

1. INTRODUCTION.....	1
1.1 SCOPE OF STUDY.....	1
1.2 METHODOLOGY.....	1
2. EUROPEAN SUMMARY.....	3
3. OPP PRODUCTS AND PRODUCTION.....	7
3.1 OPP FILM TYPES.....	7
3.1.1 Plain Film.....	7
3.1.2 Co-extruded Film.....	7
3.1.3 Coated Film.....	7
3.1.4 Opaque/Pearlised Film.....	8
3.1.5 Metallised Films.....	8
3.1.6 Dense White Pigmented Film.....	8
3.1.7 Matt Film.....	8
3.2 METHODS OF PRODUCTION.....	10
3.3 PRODUCTION CAPACITY BY REGION.....	11
4. WEST EUROPEAN MARKET ANALYSIS.....	15
4.1 MARKET FOR OPP FILM BY COUNTRY.....	16
4.1.1 United Kingdom.....	16
4.1.2 France.....	16
4.1.3 Germany.....	17
4.1.4 Italy.....	17
4.1.5 Spain.....	17
4.1.6 Benelux.....	17
4.2 SALES OF OPP FILM BY MAJOR APPLICATION.....	17
4.2.1 Crisps and Snacks.....	18
4.2.2 Biscuits.....	18
4.2.3 Confectionery.....	18
4.2.4 Tobacco.....	18
4.2.5 Flower Wraps and Tapes.....	18
4.3 SALES OF OPP FILM BY PRODUCT TYPE.....	20
5. IMPORT/EXPORT STATISTICS.....	21
5.1 DEFINITIONS.....	21
5.2 TRADE STATISTICS BY COUNTRY.....	22
5.2.1 Austria.....	22
5.2.2 Belgium.....	24
5.2.3 Denmark.....	26
5.2.4 Finland.....	28
5.2.5 France.....	30
5.2.6 Germany.....	32
5.2.7 Greece.....	34
5.2.8 Ireland.....	36
5.2.9 Italy.....	38
5.2.10 Luxembourg.....	40
5.2.11 The Netherlands.....	42
5.2.12 Portugal.....	44
5.2.13 Spain.....	46
5.2.14 Sweden.....	48
5.2.15 United Kingdom.....	50
6. RAW MATERIALS – POLYPROPYLENE RESIN.....	53

6.1	PRODUCTION CAPACITY	53
6.2	WEST EUROPEAN MARKET	54
6.3	SUPPLY/DEMAND BALANCE	55
6.4	PRICE LEVELS OF POLYPROPYLENE RESIN	55
7.	OPP FILM PRICE LEVELS	57
8.	CONVERSION.....	59
9.	MAJOR SUPPLIER PROFILES	63
9.1	BIMO	63
9.1.1	<i>Company Overview</i>	63
9.1.2	<i>Product Range</i>	64
9.1.3	<i>Contact Names</i>	65
9.2	BOLLORÉ	66
9.2.1	<i>Company Overview</i>	66
9.2.2	<i>Product Range</i>	67
9.2.3	<i>Contact Names</i>	67
9.3	BST SpA (Box Sealing Tape)	68
9.3.1	<i>Company Overview</i>	68
9.3.2	<i>Product Range</i>	69
9.3.3	<i>Contact Names</i>	69
9.4	DERPROSA	70
9.4.1	<i>Company Overview</i>	70
9.4.2	<i>Product Range</i>	71
9.4.3	<i>Contact Names:</i>	72
9.5	EXXONMOBIL	73
9.5.1	<i>Company Overview</i>	73
9.5.2	<i>Product Range</i>	74
9.5.3	<i>Contact Names</i>	78
9.6	MANULI FILM	79
9.6.1	<i>Company Overview</i>	79
9.6.2	<i>Product Range</i>	80
9.6.3	<i>Contact Names</i>	81
9.7	MOPLEFAN	82
9.7.1	<i>Company Overview</i>	82
9.7.2	<i>Product Range</i>	83
9.7.3	<i>Contact Names</i>	85
9.8	POLIBAK	86
9.8.1	<i>Company Overview</i>	86
9.8.2	<i>Product Range</i>	87
9.8.3	<i>Contact Names:</i>	88
9.9	POLINAS	89
9.9.1	<i>Company Overview</i>	89
9.9.2	<i>Product Range</i>	90
9.9.3	<i>Contact Names</i>	93
9.10	POLIPROPILENO DE GALICIA S.A.	94
9.10.1	<i>Company Overview</i>	94
9.10.2	<i>Product Range</i>	95
9.10.3	<i>Contact Names</i>	96
9.11	RADICI	97
9.11.1	<i>Company Overview</i>	97
9.11.2	<i>Product Range</i>	98
9.11.3	<i>Contact Names</i>	100
9.12	SUPER FILM.....	101
9.12.1	<i>Company Overview</i>	101
9.12.2	<i>Product Range</i>	102
9.12.3	<i>Contact Names</i>	103
9.13	TRESPAPHAN	104
9.13.1	<i>Company Overview</i>	104

9.13.2	Product Range.....	105
9.13.3	Contact Names	106
9.14	UCB	107
9.14.1	Company Overview.....	107
9.14.2	Product Range.....	108
9.14.3	Contact Names:.....	110
9.15	VIBAC	111
9.15.1	Company Overview.....	111
9.15.2	Product Range.....	112
9.15.3	Contact Names.....	112
9.16	WALOTHEN GMBH.....	113
9.16.1	Company Overview.....	113
9.16.2	Product Range.....	114
9.16.3	Contact Names:.....	116
10.	MAJOR PRODUCERS DIRECTORY.....	117
10.1	BELGIUM	117
10.2	FINLAND.....	117
10.3	FRANCE.....	117
10.4	GERMANY	117
10.5	ITALY.....	118
10.6	LUXEMBOURG.....	118
10.7	SPAIN.....	119
10.8	TURKEY	119
10.9	UNITED KINGDOM.....	119
11.	MAJOR CONVERTERS DIRECTORY.....	121
11.1	AUSTRIA	121
11.2	BELGIUM	122
11.3	DENMARK	125
11.4	FINLAND.....	125
11.5	FRANCE.....	125
11.6	GERMANY	129
11.7	ITALY.....	134
11.8	NETHERLANDS.....	137
11.9	PORTUGAL	139
11.10	SPAIN.....	139
11.11	SWEDEN.....	143
11.12	SWITZERLAND	143
11.13	UNITED KINGDOM	145
12.	SOURCES OF INFORMATION.....	153
12.1	PACKAGING TRADE ASSOCIATIONS	153
12.1.1	Belgium.....	153
12.1.2	Denmark.....	153
12.1.3	France.....	153
12.1.4	Germany.....	153
12.1.5	Italy.....	154
12.1.6	Netherlands.....	154
12.1.7	Portugal.....	154
12.1.8	Switzerland.....	154
12.1.9	Turkey.....	154
12.1.10	United Kingdom.....	154
12.1.11	EU.....	155
12.2	PLASTICS TRADE ASSOCIATIONS	155
12.2.1	Belgium.....	155
12.2.2	Denmark.....	155
12.2.3	Finland.....	155
12.2.4	France.....	155
12.2.5	Germany.....	155

12.2.6	<i>Ireland</i>	156
12.2.7	<i>Italy</i>	156
12.2.8	<i>Netherlands</i>	156
12.2.9	<i>Portugal</i>	156
12.2.10	<i>Spain</i>	156
12.2.11	<i>Sweden</i>	156
12.2.12	<i>Switzerland</i>	157
12.2.13	<i>United Kingdom</i>	157
12.2.14	<i>EU</i>	157
13.	PACKAGING TRADE JOURNALS.....	159
13.1	AUSTRIA.....	159
13.2	BELGIUM.....	159
13.3	FRANCE.....	159
13.4	GERMANY.....	159
13.5	ITALY.....	160
13.6	NETHERLANDS.....	160
13.7	NORWAY.....	161
13.8	SPAIN.....	161
13.9	SWEDEN.....	161
13.10	UNITED KINGDOM.....	161
14.	PLASTICS TRADE JOURNALS.....	163
14.1	FRANCE.....	163
14.2	GERMANY.....	163
14.3	ITALY.....	163
14.4	NETHERLANDS.....	164
14.5	SPAIN.....	164
14.6	UNITED KINGDOM.....	164

TABLE OF TABLES

1. INTRODUCTION	1
1.1 SCOPE OF STUDY	1
1.2 METHODOLOGY	1
2. EUROPEAN SUMMARY.....	3
The West European Market for OPP Film by Region, 2000 (Tonnes).....	4
The West European Market for OPP Film by End-use, 2000 (%)	5
The West European Market for OPP Film by Product Type, 2000 (Tonnes + %)	5
3. OPP PRODUCTS AND PRODUCTION.....	7
3.1 OPP FILM TYPES	7
A Summary of Selected Major European OPP Producers and their Product Ranges, 2000/2001	9
3.2 METHODS OF PRODUCTION	10
3.3 PRODUCTION CAPACITY BY REGION	11
West European OPP Film Nameplate Capacity by Country, 2000 (Tonnes).....	11
West European OPP Film Production by Country, 2000 (Tonnes).....	11
West European OPP Film Production Capacity by Manufacturer, 2000 (Tonnes/p.a.)	12
4. WEST EUROPEAN MARKET ANALYSIS	15
West European OPP Film Consumption 2000 (Kg/Capita)	15
4.1 MARKET FOR OPP FILM BY COUNTRY	16
The West European Market for OPP Film by Country, 2000 (Tonnes).....	16
4.2 SALES OF OPP FILM BY MAJOR APPLICATION	17
West European OPP Film Consumption by End-use, 2000 (Tonnes).....	19
4.3 SALES OF OPP FILM BY PRODUCT TYPE	20
West European OPP Film Consumption by Product Type, 2000 (Tonnes)	20
Growth Rates for West European OPP Film Consumption by Product Type, 2000-2005 (% Growth p.a.)	20
Forecast West European OPP Film Consumption by Product Type, 2005 (Tonnes).....	20
5. IMPORT/EXPORT STATISTICS.....	21
5.1 DEFINITIONS	21
5.2 TRADE STATISTICS BY COUNTRY	22
Austrian Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	22
Austrian Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	23
Belgian Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	24
Belgian Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	25
Danish Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	26
Danish Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	27
Finnish Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	28
Finnish Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	29
French Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	30
French Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	31
German Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	32
German Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	33
Greek Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	34
Greek Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	35
Irish Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	36
Irish Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	37
Italian Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	38
Italian Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	39
Luxembourg Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	40
Luxembourg Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	41
Dutch Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	42
Dutch Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	43
Portuguese Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	44
Portuguese Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	45
Spanish Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	46

Spanish Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	47
Swedish Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	48
Swedish Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	49
United Kingdom Imports of OPP Film, 1999 (Tonnes + '000 ECU).....	50
United Kingdom Exports of OPP Film, 1999 (Tonnes + '000 ECU).....	51
6. RAW MATERIALS – POLYPROPYLENE RESIN.....	53
6.1 PRODUCTION CAPACITY.....	53
Production Capacity of Main West European Suppliers of PP Resin, 2000 (Tonnes).....	53
6.2 WEST EUROPEAN MARKET.....	54
West European Consumption of Polypropylene Resin by End-use, 1999 (% Share).....	54
6.3 SUPPLY/DEMAND BALANCE.....	55
6.4 PRICE LEVELS OF POLYPROPYLENE RESIN.....	55
7. OPP FILM PRICE LEVELS.....	57
8. CONVERSION.....	59
Major OPP Conversion Groups, 2000/1.....	59
Continued.....	59
Continued.....	60
Major Conversion Groups, 2000/1.....	60
9. MAJOR SUPPLIER PROFILES.....	63
9.1 BIMO.....	63
9.2 BOLLORÉ.....	66
9.3 BST SpA (Box Sealing Tape).....	68
9.4 DERPROSA.....	70
9.5 EXXONMOBIL.....	73
9.6 MANULI FILM.....	79
9.7 MOPLEFAN.....	82
9.8 POLIBAK.....	86
9.9 POLINAS.....	89
9.10 POLIPROPILENO DE GALICIA S.A.....	94
9.11 RADICI.....	97
9.12 SUPER FILM.....	101
9.13 TRESPAPHAN.....	104
9.14 UCB.....	107
9.15 VIBAC.....	111
9.16 WALOTHEN GMBH.....	113
10. MAJOR PRODUCERS DIRECTORY.....	117
10.1 BELGIUM.....	117
10.2 FINLAND.....	117
10.3 FRANCE.....	117
10.4 GERMANY.....	117
10.5 ITALY.....	118
10.6 LUXEMBOURG.....	118
10.7 SPAIN.....	119
10.8 TURKEY.....	119
10.9 UNITED KINGDOM.....	119
11. MAJOR CONVERTERS DIRECTORY.....	121
11.1 AUSTRIA.....	121
11.2 BELGIUM.....	122
11.3 DENMARK.....	125
11.4 FINLAND.....	125
11.5 FRANCE.....	125
11.6 GERMANY.....	129
11.7 ITALY.....	134
11.8 NETHERLANDS.....	137
11.9 PORTUGAL.....	139

11.10	SPAIN.....	139
11.11	SWEDEN.....	143
11.12	SWITZERLAND.....	143
11.13	UNITED KINGDOM.....	145
12.	SOURCES OF INFORMATION	153
12.1	PACKAGING TRADE ASSOCIATIONS.....	153
12.2	PLASTICS TRADE ASSOCIATIONS.....	155
13.	PACKAGING TRADE JOURNALS	159
13.1	AUSTRIA.....	159
13.2	BELGIUM.....	159
13.3	FRANCE.....	159
13.4	GERMANY.....	159
13.5	ITALY.....	160
13.6	NETHERLANDS.....	160
13.7	NORWAY.....	161
13.8	SPAIN.....	161
13.9	SWEDEN.....	161
13.10	UNITED KINGDOM.....	161
14.	PLASTICS TRADE JOURNALS	163
14.1	FRANCE.....	163
14.2	GERMANY.....	163
14.3	ITALY.....	163
14.4	NETHERLANDS.....	164
14.5	SPAIN.....	164
14.6	UNITED KINGDOM.....	164
