Market Study: Bags and Sacks - World

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- **Gain new customers**
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- **Improve your understanding of your competitors**
  Who exactly are your competitors - and what are their strengths and weaknesses
- **Obtain a more detailed picture of your segment**
  Learn which time is the best for entering or leaving a market
- **Have a look at the future**
  Find out if new investments and technologies are worthwhile and how to gain access to future markets. We also show possible market scenarios
- **Recognize opportunities and risks**
  Identify opportunities and risks on your target markets in time

This study is useful for:

- Manufacturers, processors and traders of bags and sacks
- Suppliers of raw materials such as polyethylene, polypropylene, PVC, PET, bioplastics, kraft paper, and additives such as antioxidants, adhesives or stabilizers
- Manufacturers and traders of plastic films, plastic strips, kraft paper, and paper fibers
- Associations and Institutes
- Executive board, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement

In this brochure you will find the following information:

- An introduction on page 3
- A summary of the table of contents on page 4
- Following this, there are example pages from the study
- Please use the form on the last page to easily order your copy or a free reading sample!

Ultrathin-walled plastic bags, carrier bags with enhanced carrying handle, garbage bags, FIBC, valve bags, stand-up pouches, disposable sachets: The list of different types of bags and sacks is long. Depending on the application, they differ in material, size and their mechanical properties.

Ceresana expects the worldwide sales volume to increase until 2022 to a total of 37.9 million tonnes. This study covers the global market for bags and sacks made of polyethylene film, other plastic films, woven plastic bags, and paper.

Polyethylene is the by far most commonly used material for the production of bags and sacks. LLDPE is used here significantly more often than LDPE or HDPE. However, individual materials may account for highly different market shares in various applications. This study splits the market into carrier bags, garbage bags and sacks, heavy duty and industry sacks, food packaging and other applications.

The EU Tightens the Measures against Disposable Carrier Bags

Worldwide, many countries develop regulations to reduce the use of disposable carrier bags. In reality, passing mandatory laws as well as their implementation and monitoring are problematic and usually receive a lot of opposition. The problem of disposable carrier bags made from plastic is not equally severe in all countries. Besides per capita consumption and amount of reuse, negative effects on the environment also depend on the quality of the national waste mangement industry and the respective disposal and recycling systems. In part, these vary widely. In Europe, the EU Commission stipulated the objective to reduce the high consumption of plastic carrier bags. The amendment of the packaging directive (directive 2015/720) commits the member states of the EU to precise actions. This will lead to a noticeable reduction. For example in France, the demand for plastic carrier bags will decrease until 2022 by 5.3% p.a.

Bioplastics Find Their Way into Legislations Worldwide

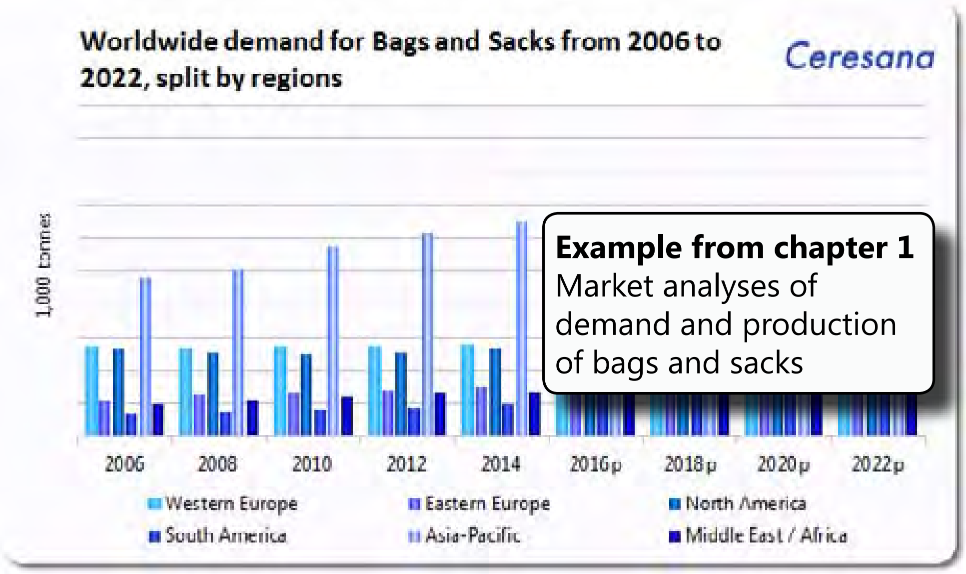
In many countries, bans of certain types of carrier bags are already existent, or, with the aid of special taxes and fees, it is tried to regulate the demand for several products. However, oftentimes these regulations are only regional and not national (e.g. in the USA). Usually, thin disposable carrier bags made of PE are targeted by these initiatives. Carrier bags made of bioplastics are often exempt from these bans and fees. These are plastics that are made of renewable resources and/or are biodegradable. Importance and public reception of bags made of bioplastics have been considerably increasing. This becomes apparent by the fact that national legislators make explicit references to these products. Yet, composting of these bags in dedicated facilities is not yet without problems. Until today, various circles continue to advertise the burning of these bags as the ecologically most sensible solution.

Construction Industry an Important Influencing Factor regarding Heavy Duty Sacks

Heavy duty and industry sacks have gained importance during the past decades, as a consequence of an increased exchange of goods between countries and between companies. Some segments, however, have substituted conventional paper sacks by sacks made of plastics. In areas such as animal feed or construction materials, e.g. cement, paper sacks continue to play an important role, but given their good properties sacks made of PE have the potential to gain market shares in these segments. Also, development dynamics of individual types of sacks in a country depends to a certain extent on the amount of packaged goods that is produced (e.g. cement, sand, animal feed, dry fertilizers, seeds). We expect the total demand of heavy duty sacks made of plastics to increase by only 3.8% p.a. in the following years.

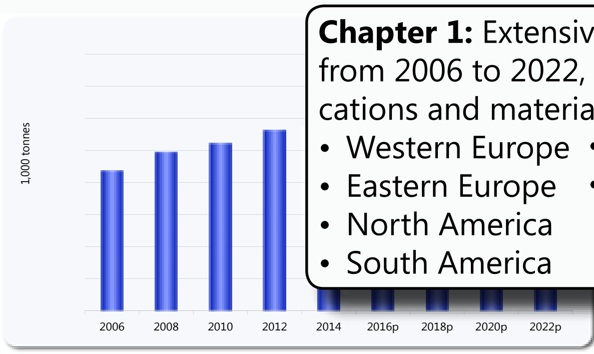
Stand-Up Pouches - Market is Growing Constantly

On the market for food packaging, an increasing trend towards plastic bags becomes apparent: Traditional plastic packaging, metal cans and glass jars are substituted. One advantage of flexible plastic bags is that they can adapt to the size of the packaged good, which helps to optimize the packaging size. Also, these packagings can be manufactured in microwaveable varieties. Stand-up pouches have shown a downright triumphal march in the past few years, as this study explains.


Worldwide demand for Bags and Sacks from 2006 to 2022, split by regions
Ceresana
1,000 tonnes
2006
2008
2010
2012
2014
2016p
2018p
2020p
2022p
Western Europe
Eastern Europe
North America
South America
Asia-Pacific
Middle East / Africa
Example from chapter 1
Market analyses of demand and production of bags and sacks

1.3.1 Eastern Europe - Demand

In Eastern Europe, the amount of bags and sacks demanded for in the past eight years rose by X % p.a. and amounted to about X million tonnes in 2014. Until 2022, we expect the overall Eastern European demand for bags and sacks to increase to approx. X million tonnes in 2022. In 2022, the share of Eastern Europe on the world-wide consumption of bags and sacks will be around X %.



Chapter 1: Extensive market data from 2006 to 2022, split by applications and material:
- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East/ Africa

Graph: Demand for bags and sacks in Eastern Europe from 2006 to 2022

in million tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Poland	X	X	X	X	X	X	X	X	X	X
Russia	X	X	X	X	X	X	X	X	X	X
Turkey	X	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X	X
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: Demand for bags and sacks in Eastern Europe from 2006 to 2022 – split by major countries

In 2014, Turkey was the largest consumer of bags and sacks in Eastern Europe. Russia ranked second, followed by Poland. The other Eastern European countries (Ukraine, Czechia, Romania, Hungary, Greece, Belarus, Slovakia, Bulgaria, Croatia,

2.5.2 India - Demand & Production

2.5.2.1 Demand

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Carrier bags	X	X	X	X	X	X	X	X	X	X
Garbage	X	X	X	X						
Heavy duty & Industry	X	X	X	X						
Foodstuffs	X	X	X	X						
Others	X	X	X	X						
Plastics total	**X**	**X**	**X**	**X**						
Carrier bags	X	X	X	X						
Heavy duty & Industry	X	X	X	X						
Foodstuffs	X	X	X	X						
Others	X	X	X	X						
Paper total	**X**	**X**	**X**	**X**						

Chapter 2: Specific analyses and forecasts for 16 countries:
- Demand for each application area and material
- Production split by material (LDPE, LLDPE, HDPE, other plastics, woven plastics, paper)
- Trade split by plastics and paper

Table: Demand for bags and sacks in India from 2006 to 2022 – split by applications

2.5.2.2 Production and Trade

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
LDPE	X	X	X	X	X	X	X	X	X	X
LLDPE	X	X	X	X	X	X	X	X	X	X
HDPE	X	X	X	X	X	X	X	X	X	X
Polyethylene total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Other Plastics	X	X	X	X	X	X	X	X	X	X
Plastics Woven	X	X	X	X	X	X	X	X	X	X
Plastics total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Paper total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Bags and sacks total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

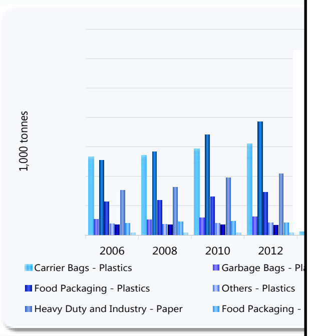
Table: Production of bags and sacks in India from 2006 to 2022 – split by materials

3.6 Asia-Pacific - Applications

Of the about X million tonnes of bags and sacks which were consumed in the region Asia-Pacific in 2014, the application area heavy duty and industrial products constituted the majority with X %. The application c

Chapter 3: Detailed data and influential factors on the use in:

- Carrier bags - plastics
- Garbage bags - plastics
- Heavy duty and industry - plastics
- Food packaging - plastics
- Other applications - plastics
- Carrier bags - paper
- Heavy duty and industry - paper
- Food packaging - paper
- Other applications - paper



Graph: Demand for bags and sacks in Asia-
plications

in 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Carrier bags	X	X	X	X	X	X	X	X	X	X
Garbage	X	X	X	X	X	X	X	X	X	X
Heavy duty & Industry	X	X	X	X	X	X	X	X	X	X
Foodstuffs	X	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X	X
Plastics total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Carrier bags	X	X	X	X	X	X	X	X	X	X
Heavy duty & Industry	X	X	X	X	X	X	X	X	X	X
Foodstuffs	X	X	X	X	X	X	X	X	X	X
Others	X	X	X	X	X	X	X	X	X	X
Paper total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: Demand for bags and sacks in Asia-Pacific from 2006 to 2022 – split by applications

4.4 Material - Paper

4.4.1 World

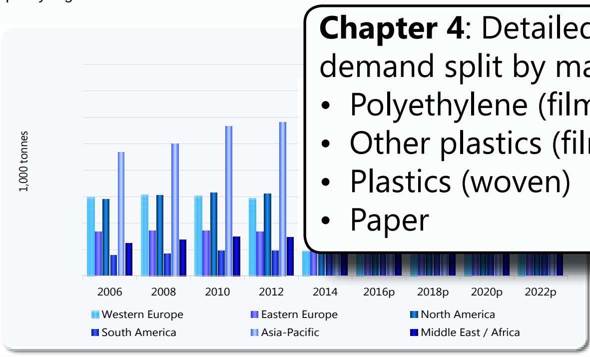
In 2014, X million tonnes of bags and sacks made of paper were processed worldwide. In the past eight years, demand rose at an average rate of X % per year. X % of global demand in 2014 originated in the region Asia-Pacific. North America ranked second, followed by Western Europe.

in million tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Western Europe	X	X	X	X	X	X	X	X	X	X
Eastern Europe	X	X	X	X	X	X	X	X	X	X
North America	X	X	X	X	X	X	X	X	X	X
South America	X	X	X	X	X	X	X	X	X	X
Asia-Pacific	X	X	X	X	X	X	X	X	X	X
Middle East / Africa	X	X	X	X	X	X	X	X	X	X
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

Table: Worldwide demand for bags and sacks made of paper from 2006 to 2022 – split by region

Chapter 4: Detailed data on demand split by material:

- Polyethylene (films)
- Other plastics (films)
- Plastics (woven)
- Paper



Graph: Worldwide demand for bags and sacks made of paper from 2006 to 2022 – split by region

Karatzis S.A.

Street A Industrial Area
71601 Heraklion, Crete
Greece
Phone: +30 2810 382900
Web: www.karatzis.gr

Financial Key Data

(in million EUR)	2011	2012	2013	2014
Revenues	55.7	61.8	66.8	71.4
Annual profit	5.6	5.1	4.3	6.4

General Information About the Company

Divisions, Product Range
The company's product portfolio includes:
- sacks: sacks on reels, plastic sacks, sacks sold as units
- bale manufacturing materials: bale and silage nets
- tubular nets: folder, on reels or loose in mesh bags
- palette netwraps
- christmas tree netting
- display bags under the brands Easypack and Verti Net
- packaging nets for meat
- gardening: decorative nets, private fencing, bird protection nets, pond nets
- shade nets
- construction: road fences, scaffolding nets, shade nets

Production Sites
The company's production sites are located in:

Chapter 5: Data and facts on major producers, clearly arranged by:
- Contact details
- Turnover and profit
- Production sites
- Profile summary
- Product details

Profile Summary
Karatzis S.A. was founded in 1973 and has been listed on the Athens Stock Exchange since 2000. Currently, the company employs about 650 people and is represented in more than 50 countries. The total annual production capacity of Karatzis amounts to about 29,000 tonnes. The company's total assets in 2014 accounted for about EUR 155.2 million.
MESH PACK is Karatzis' subsidiary based in Germany.
The quality management system of all production sites is ISO 9001 certified.

Specific Information About Bags & Sacks

Sacks:
- Sacks on reels: suitable for packing fresh food including citrus fruits or potatoes and household items such as firewood or toys. Sacks on reels are 100% recyclable.
- Plastic sacks: specialty sacks for potato seeds that protect the sprouts
- Sacks as piece goods: depending on the application area the loose sacks can have a strap or a carry handle loading capacity ranges from 1 kg to 50 kg

Tubular nets:
- packaging for fruits and vegetables
- folder, on reels or loose in mesh bags

Display Bags:
- "EasyPack": for goods
- "Vert Net": for goods
sides

Chapter 5: In-depth profiles for the largest manufacturers, including Amcor, Constantia Flexibles, DS Smith, DuPont, Formosa Plastics, Mondi, Oji, Reynolds, Sealed Air, Smurfit Kappa, Sonoco, Stora Enso, Toppan Printing, Toyo Seikan, and Uflex . (The profiles are assigned to the country in which the company is headquartered and include JVs and subsidiaries.)

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- ☐ Polyethylene - LLDPE (2nd ed.)
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- ☐ Toluene
- ☐ Xylene

Packaging

- ☐ Bags and Sacks - Europe
- ☐ Bags and Sacks - World
- ☐ Caps & Closures - Europe
- ☐ Corrugated & Solid Board & Carton
- ☐ Flexible Packaging - Europe
- ☐ Food Packaging - Europe
- ☐ Plastic Bottles - Europe
- ☐ Plastic Caps & Closures - Europe
- ☐ Plastic Caps & Closures - World
- ☐ Plastic Containers - World
- ☐ Plastic Films - World
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- ☐ Fertilizers - World
- ☐ Urea - World

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- ☐ Ethylene - USA
- ☐ Propylene - China
- ☐ Propylene - USA

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