

## **France Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The packaging market in France is anticipated to grow at a CAGR of 1.76%. One of the largest GDPs in the world belongs to the French economy; owing to its size and the demand from domestic consumption, the French packaging market is among the largest, most attractive, and mature markets in the world. The industry is maturing in terms of the adoption of packaging solutions in the nation, which is one of the main factors for the slow growth.

#### Key Highlights

Influenced by changing demographics and factors such as urbanization and employment rates, the growing market impacts consumer spending power and purchasing habits. Due to these changes, the need for new packaging types, such as convenience packaging, value-for-money, multi-packs, and more miniature single-serve packs, is increasing. Also, packaging types such as rigid plastics and flexible packaging are leading the market.

Additionally, the growth in the number of tourists in France is causing an increased demand for traditional French food and beverages and the extended use of multi-lingual labels for conventional French products. Hence, these factors are expected to drive market growth.

Moreover, the International Organization of Vine and Wine (OIV) also reports that France has the largest per capita wine consumption in Europe, with roughly 25.2 million hectoliters consumed in 2021, compared to 13.4 million hectoliters consumed in the UK in the same year. In France, packaging for glass bottles is anticipated to expand due to the growing consumption of wine. However, increasing regulations in the country against the use of plastic are anticipated to affect the market for plastic packaging in the country. For instance, the French Parliament's lower chamber passed a law in December 2020 that banned all single-use plastic products and packaging after 2040, in addition to several initiatives to increase reuse and recycling.

Due to the COVID-19 pandemic, the nation witnessed lockdown restrictions, which led to panic buying. This imposed massive pressure on FMCG companies to adopt flexible plastic packaging solutions. Food companies increasingly witnessed an inclination

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toward pre-packaged food in smaller, consumer-sized packaging.?

The impact of Russia's Ukraine war on commodity pricing and global supply chains may put pressure on the profit margins of European non-paper packaging producers. While companies in the glass and metal packaging industries are turning to hedging tactics and stable demand to retain their resilience, the plastic packaging sector is anticipated to experience the most significant volatility as they struggle to pass on cost increases on time.

## France Packaging Market Trends

### Flexible Packaging to Have a Significant Share

The packaging industry has, over the years, experienced substantial demand in France. As cheap and lightweight packaging is gaining popularity in the country, manufacturers are encouraged to use flexible packaging for different products. Hence, these factors are responsible for boosting the growth of the market.

Flexible packaging is a type whose shape can be readily changed, e.g., bags and pouches. This leads the way in packaging innovation, ensuring food safety and extending shelf life. It also follows some of the most important trends in the packaging industry, including product protection, packaging design and performance, consumer convenience, and sustainability that positively impacts the environment, consumers, and businesses.

Factors stimulating the market growth in the region are that it generates less waste, significantly reducing landfill discards. The lightweight, flexible packaging also produces less energy (fossil fuel) consumption in transportation and environmental pollution. Furthermore, technological innovations in the packaging industry have enabled manufacturers to use fewer natural resources. Moreover, the improvements in production processes have reduced water and energy consumption, greenhouse gas emission, and volatile organic compounds emission.

Flexible packaging made of paper is experiencing growth in the country. Even though the country's distribution of paper and paperboard production in packaging is 65.8% in 2021, according to COPACEL, In 2021, the country imported 5.08 million metric tons of paper and paperboard. This states that the players focus on paper-based flexible packaging to significantly reduce plastic use, eventually promoting paper-based packaging in the forecast period. Even though the market witnessed a decline in 2021, the growth is expected to surge in the coming years due to the rising demand for sustainable packaging materials.

### E-commerce Market is Expected to Contribute to the Growth

According to Atradius, French food and beverage output will expand by roughly 4% in 2022 after increasing by 4.6% in 2021 and contracting by 2.0% in 2020. Foodservice and producers/processors of significant industries, including beverages and meat, suffered from worsening hospitality and catering demand during the lockdowns in 2020 and early 2021, which had a detrimental impact on their profitability. While sales in the restaurant and catering industries have recovered since last year, they have yet to return to pre-pandemic levels.

European countries are experiencing a rise in demand for convenience foods due to the busy lifestyle of people. Hence, food that gets cooked quickly attracts many consumers and, in turn, increases demand for corrugated boxes or folding cartons, mainly used as a secondary or primary in case of a bakery or prepared food dishes. The surging population also drives the demand for processed food, which is considered healthy and convenient.

With the evolution of e-commerce and focus on offering an eco-friendly solution to meet the regulatory bindings, the eco-friendly approach has also emerged as a significant factor for new design with the consumer becoming waste-conscious. End-user industry players are steering away from over-packaging and wasting space, and similar trends have been observed in the e-commerce sector. According to Edge by Ascential, retail e-commerce sales in France will reach EUR 72.5 billion (USD 77.07 billion) in 2021.

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Moreover, two-thirds of this proportion refers to first-party sales. 1P sales in France are expected to reach about EUR 68 billion (USD 72.29 billion) by 2026, while 3P sales will be around EUR 41 billion (USD 43.58 billion).

Also, regarding e-commerce's percentage of global sales, the United Arab Emirates was the top-performing country. Carrefour's E-commerce accounted for 12.6% of Carrefour's sales in the nation. France's e-commerce sales account for about 8.8% of total sales. Additionally, E-commerce sales of the French multinational wholesaler and retail Carrefour, generated sales around USD 6.3 billion worldwide in 2022. The growing sales is expected to support growth of flexible packaging in France.

## France Packaging Market Competitor Analysis

The competitive landscape of the French packaging market is moderately fragmented, with many packaging vendors available in the country, such as DS Smith PLC, AR Packaging Group AB, Smurfit Kappa Group PLC and Tetra Pak International SA. Moreover, the competition level among these vendors is high due to the various innovations and investments done by the companies. Companies are also undergoing acquisitions to strengthen their product portfolios and increase their market shares.

June 2022: Saverglass, an industrial group of French origin specializing in the production and decoration of luxury and high-end glass bottles for the wine and spirits industry, announces the doubling of the glass production and the increase of the decoration capacities of its plant located in Acatlan de Juarez near Guadalajara, by early 2023 to meet demand in the Americas.

May 2022: Coca-Cola in France has announced that the company will launch a new, universal 250ml returnable glass bottle for its Fuze Tea, Tropic, Sprite, Fanta, and Minute Maid brands in hotels, restaurants, and cafes. They join the Coca-Cola Original, Coca-Cola Zero, and Coca-Cola Cherry brands in their iconic 330ml bottles, also historically made of returnable glass. Also, by the end of 2022, CCEP will be the first supplier of non-alcoholic beverages to distribute 100% of its beverages to hotels, restaurants, and cafes using a deposit system.

### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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