

Europe Confectionery Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Confectionery Packaging Market size is estimated at USD 3.17 billion in 2024, and is expected to reach USD 3.73 billion by 2029, growing at a CAGR of 3.28% during the forecast period (2024-2029).

The pandemic undoubtedly disrupted commerce across the globe, primarily highlighting the critical nature of the supply chain. Like the other essential infrastructure sectors, the confectionery industry has also been significantly affected by these challenges. For instance, as of Jun 2021, the German confectionery industry stated that it does not expect the business to return to normal until next year at the earliest. A survey by the Federal Association of the German Confectionery Industry (BDSI) examined the economic development of medium-sized members in the first quarter of 2021. It stated that the industry remains tense owing to the coronavirus crisis.

Key Highlights

- Consumption of confectionery products witnessed a record fall due to the COVID-19 pandemic lockdowns. For instance, the German confectionery registered the first slump in exports in the past 20 years. Notably, member countries of the European Union receive around 80% of the German confectionery exports. With lockdowns, logistical hurdles, and increased unemployment, falling household incomes were the significant drivers for declining confectionery sales.
- Plastic Confectionery packaging has become popular among consumers over other products, as plastic material is lightweight and easier to handle. Even significant manufacturers have preferred to use plastic packaging like Containers & Stand-up Pouches, owing to the lower cost of production.
- A wide variety of advanced, cost-effective, and sustainable packaging solutions emerging in the market, and plastic as a product, has been accepted globally. This has led to the regional players, such as Amcor, introducing new plastic product formats to cater to the demand for confectionery packaging.

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-However, Stand-up Pouches (SUPs) are witnessing significant demand and consumer interest in the studied region. The revived interest in SUPs can be attributed to various factors, including developing new packaging machinery, which delivers higher production and filling speeds, and advances in sealing efficiencies. In addition, other technological advances have helped to improve functionality and better heat and puncture resistance of the laminate material.

-According to Confectionery Packaging Europe, healthy growth has increased production for most end-user markets, including sweets, chocolate, and fresh foods. The increased demand for customer-friendly products which are lightweight and easily transportable can be considered as a significant factor behind Europe's high market share in the global confectionery packaging market. Increasing focus on sustainability, the increased need for extended product shelf life, rising standards of hygiene, and customer focus on ease of use are the primary drivers of the studied market.

-Further, the Packaging Directive aims to harmonize national measures on the packaging and the management of packaging waste. Moreover, the EU countries are directed to ensure that producer responsibility schemes are established for all packaging. The EU has targeted to recycle 65% of all packaging materials, of which they have planned to recycle 50% of plastic packaging, 50% of Aluminum packaging, and 75% of paper and cardboard packaging by 2025. Further, the EU targets to recycle 70% of all packaging materials by 2030.

Europe Confectionery Packaging Market Trends

Chocolate is Expected to Hold Significant Market Share

- Chocolate is packaged in materials that prevent oxidation and protect the taste and aroma of the chocolate. Chocolate can get stale when exposed to oxygen and lose its flavor; therefore, it becomes inedible, rendering it unfit to sell. Hence, virgin fiber paperboard is used, but barriers are also needed to mitigate the transfer of external odors and ensure shelf life.
- Moreover, chocolate bars are typically wrapped in one of two ways: aluminum foil which is in direct contact with the chocolate, and a decorative paper sleeve that fits over the entire bar, or PET films, that serves as primary and secondary packaging.
- Packaging plays a vital role in chocolate purchasing behavior. Packaging of chocolates is particularly relevant as chocolate is often purchased as a gift for someone else. Thus, many studies indicated that the quality of the chocolate is as important as the packaging that wraps it. If the consumer is not familiar with the product, then the consumer tends to choose the one with the most pleasant packaging.
- According to a study conducted by Rebollar, the consumer's eye is primarily drawn to the size of the information on the packaging. It tends to focus on the elements from left to right and from top to bottom. The consumers perceive the packaging message that combines these two patterns with a more significant impact.
- Furthermore, in February 2021, Nestle's Smarties brand planned to adopt recyclable paper packaging for its chocolate confectionery products. Smarties is one of the first global confectionery brands to switch to recyclable paper packaging, removing around 250 million plastic packs sold worldwide every year.

United Kingdom Accounts for the Largest Market Share

- The UK confectionery market is expanding as manufacturers develop new means of tempting the UK consumer base to indulge its sweet tooth. A vast number of products available to UK consumers at retail is expanding due to the increasing consumer demand for innovation. More adventurous products are quickly imitated in style, as exemplified by Nestle's Wonka brand and Cadbury Dairy Milk's Marvellous Creations. Besides, the taste and brand preferences allow for individual solid demand.
- According to a report published on confectionerynews.com in November 2020, consumers have reportedly bought GBP 50 million more chocolates than they did in 2019, majorly driven by multipacks and sharing bars purchases at supermarkets during the

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lockdown. The grocers also revealed that the demand for popular brand sharing bars rose by 37%, while sales for its labels jumped by a fifth. Such increasing demand trends in the confectionery industry will likely increase the demand for packaging solutions in the country.

- With rising concerns over plastic packaging wastes, several leading confectionery players in the market are switching over to plastic-free solutions. For instance, recently, Flower & White, which sells its gourmet treats in outlets from Selfridges to QVC, and overseas, unveiled its latest gourmet product using a paper-based pouch with a heat-sealable coating. Further, the company has also relaunched its successful Meringue Bars' range in paper sleeves as part of a broader commitment to improve sustainability and reduce energy.

- Further, in 2020, Nestle's famous brand Smarties was launched with recyclable paper packaging for its confectionery products in the United Kingdom. It represents the transition of 90% of the Smarties range and 10% of the range already packed in recyclable paper packaging. Smarties will be the first global confectionery brand to switch to recyclable paper packaging, omitting approximately 250 million plastic packs sold globally every year.

- Further, Nestle UK and Ireland operations, which sell approximately 140 million confectionery sharing bags in the United Kingdom and Ireland every year, are redesigning their bags to deliver a 15% cut in packaging. This would remove 83 tons of plastic from its annual supply chain.

Europe Confectionery Packaging Industry Overview

The European Confectionery Packaging Market is competitive. The major players with a significant share in the market are expanding their customer base across various regions. In addition, many companies are forming strategic and collaborative initiatives with multiple companies to increase their market share and profitability. Some of the recent developments in the market are:

- July 2021 - Ferrero developed a paper-based packaging material for its confectionary range in Italy. The new packaging features a new method of wrapping Kinder Bakery products using paper film, suitable for recycling in the country's paper stream.
- September 2020 - Amcor announced the launch of a recyclable flexible retort pouch for confectioneries and snacks. This pouch has a long shelf life and offers a high barrier along with a heat-resistant feature.

Additional Benefits:

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

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