

## **Europe High Density Polyethylene (HDPE) Market Outlook - Forecast Trends, Market Size, Share and Growth Analysis Report (2025-2034)**

Market Report | 2025-06-28 | 160 pages | EMR Inc.

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### **Report description:**

The Europe high density polyethylene (HDPE) market reached a volume of 14.64 Million Tons in 2024. The market is expected to grow at a compound annual growth rate (CAGR) of 1.40% from 2025 to 2034, potentially reaching 16.82 Million Tons by 2034.

#### Europe High Density Polyethylene (HDPE) Market Growth

The opportunities in the Europe high density polyethylene (HDPE) market are being driven by the growth of the region's consumer goods and FMCG sector, as reflected in rising price levels. According to the Eurostat, in 2023, the highest price levels for consumer goods were observed in Denmark, at 43% above the regional average. This indicates rising sales of consumer goods in the country and the subsequent demand for sustainable and durable HDPE packaging solutions with enhanced versatility, recyclability, and strength. The packaging is used in various industries such as food and beverage, personal care, and household essentials, enhancing product protection and shelf-life.

According to the Europe high density polyethylene (HDPE) market analysis, indicates that the growth is being further driven by the increasing online sales of consumer goods. Online sales are preferred by consumers owing to the flexibility of doorstep delivery, convenience of easy return or exchange in case of damage, and generous discounts frequently offered by aggregators. In 2022, 17.1% of EU enterprises conducted e-sales using only websites or applications. As these values rise further, the high-density polyethylene (HDPE) demand growth is expected to grow more significantly.

#### Key Trends and Recent Developments

Applications in the packaging industry, the adoption of recyclable HDPE, and the introduction of customisable HDPE are driving the Europe high density polyethylene (HDPE) market value.

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May 2024

Finland-based UPM Raflatac launched its first RecyClass-certified, 100% recyclable New Wave paper label material that obtained a Letter of Compatibility for use on rigid HDPE and polypropylene (PP) containers. This innovation aims to significantly advance the recycling of rigid plastic packaging, supporting brand owners to shift to a circular economy in the packaging industry.

April 2024

The Portuguese plastic recycling company, Sirplaste, started the production of high-quality, odourless PCR HDPE Resin to promote the sustainable development of the packaging market. The resin is made from 100% post-consumer plastic waste, including bottles, using high-performance recycling technology designed specifically to eliminate odours and prevent contamination.

May 2023

NextLooPP, one of the major Europe high density polyethylene (HDPE) market key player, announced its plans to start operations in the Americas in the 3rd quarter of 2023. According to the company's estimates, the carbon footprint of a range of different recycled plastics when tested showed that recycled HDPE and recycled PP had a 25% lower carbon footprint than recycled PET.

September 2021

Dow Inc. started offering INTREPID 2499 Bimodal HDPE Resin for geomembranes which provide a critical line of defence against chemicals, toxins and other harmful materials entering the earth's soil and water. This HDPE offers outstanding resistance to high temperatures, chemicals, corrosion, slow crack growth (SCG), tearing, punctures and abrasion.

Wide Applications in the Packaging Industry are Propelling the Growth of the Europe High Density Polyethylene (HDPE) Market

HDPE is widely used in the packaging industry, particularly for producing recyclable plastic bottles and containers. It incorporates characteristics such as resistance to stress, moisture, and chemicals, encouraging key players to invest in HDPE solutions, and enhancing product longevity and sustainability. For instance, in June 2023, TotalEnergies launched a new high-density polyethylene resin for tethered cap applications. Its lightweight nature reduces shipping costs and environmental impact, aligning with the increasing consumer focus on sustainability.

Adoption of Recycled HDPE Plastics is a Key Trend in the Europe High Density Polyethylene (HDPE) Market

The use of recycled HDPE (rHDPE) has become a major trend in Europe owing to stringent regulations around plastic usage and waste management. Many brands have introduced them in their product and packaging applications to reduce their carbon footprint and cater to the demand of eco-conscious consumers. Austria-based packaging producer Alpla Group developed the prototype of a high-density polyethylene (HDPE) bottle made entirely of recycled-content HDPE (rHDPE) in December 2022.

Increasing Use in Drainage Pipes is Impacting the Europe High Density Polyethylene (HDPE) Market Revenue

HDPE is considered as an ideal material for manufacturing drainage pipes across several industries in Europe, including household construction, industrial machinery, and automobiles. It offers durability, flexibility, and resistance to chemical corrosion, besides being lightweight for easy handling and installation. As a result, several industrial leaders have invested in developing and improving these materials for enhanced performance. In 2022, KPS launched its new 3" conductive HDPE double wall piping system for smooth medium to high flow applications for sensitive liquids such as petrol, diesel, biodiesel, ethanol blends, and more.

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## Introduction of Customisable HDPE Containers is Accelerating the Europe High Density Polyethylene (HDPE) Market Development

The European market is witnessing the launch of customisable HDPE containers, which are playing a key role in the market's growth. Their custom designs also help brands promote their objects and products with high impact, additionally catering to consumer preference and curiosity. In a relevant effort, in June 2024, Berry Global Group started offering a customisable, rectangular HDPE bottle solution for its beauty, home, and personal care products, made from 100% post-consumer recycled plastic.

### Europe High Density Polyethylene (HDPE) Market Trends

#### Bio-based HDPE Enhancing the Long-Term Sustainability of the Europe High Density Polyethylene (HDPE) Market Growth

Bio-based HDPE is emerging as a valuable innovation in the development of the Europe high density polyethylene (HDPE) market, enhancing its long-term sustainability and growth. These are made from materials derived from renewable resources such as sugarcane or other agricultural waste while providing the same features as HDPE manufactured from traditional fossil-fuel-based feedstock. Besides, this type of HDPE is fully recyclable and has an extremely low carbon footprint, aligning with the stringent European carbon emission reduction targets.

The French gas utility network operator GRDF built the world's first gas pipeline in France made from INEOS bio-based HDPE in January 2024. The goal was to reduce the nation's overall carbon footprint. This bio-based HDPE, certified by International Sustainability and Carbon Certification (ISCC), was produced at INEOS' plant in Lillo, Belgium from wood processing residues sourced from the paper industry, replacing the traditionally used fossil fuel-derived feedstocks.

### Europe High Density Polyethylene (HDPE) Industry Segmentation

The EMR's report titled "Europe High Density Polyethylene (HDPE) Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

#### Market Breakup by Application

- Film and Sheet
- Injection Moulding
- Blow Moulding
- Wire and Cables
- Pipes and Tubes
- Others

#### Market Breakup by Feedstock

- Naphtha
- Natural Gas
- Others

#### Market Breakup by End Use

- Packaging

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- Transportation
- Electrical and Electronics
- Building and Construction
- Industry and Machinery
- Others

#### Market Breakup by Country

- United Kingdom
- Germany
- France
- Italy
- Others

#### Europe High Density Polyethylene (HDPE) Market Share

Film and sheet sector plays a crucial role due to its wide range of applications across various industries

HDPE films and sheets provide excellent durability, tensile strength, and chemical resistance, making them well-suited in packaging, construction, and agriculture sectors, contributing significantly to the Europe high density polyethylene (HDPE) market revenue. They are lightweight, versatile, recyclable, and cost-effective, with excellent moisture, UV, and barrier properties. HDPE is non-toxic and safe for food and medical applications, supporting sustainability and hygiene. In January 2024, Repsol introduced the expansion of its ultra-clean polyethylene range, launching various HDPE grades for flexible packaging. These materials are designed to improve recyclability and performance, aiding customers in meeting future EU sustainability goals.

Additionally, the expanding renewable and non-renewable energy-based power lines in European countries like Germany boost the demand for HDPE wires and cables. For instance, in April 2023, cable manufacturer Egeplast sourced high-voltage, high-temperature HDPE material from INEOS Europe Whale-Mecklar project, which involved constructing a 380 kV power line to connect wind farms across northern and southern Germany.

#### Natural Gas is the Leading Source of Production in High Density Polyethylene (HDPE) Market in Europe

According to the Europe high density polyethylene (HDPE) market report, natural gas is the most used feedstock for producing HDPE, mainly due to its cost-effectiveness and lower environmental impact. Besides, it is abundantly available in all regions, including the remotest part of the continent. In 2022, Europe produced 18,760,293 Terajoules of natural gas, according to the International Energy Administration (IEA), representing 13% of the global share. As the production further increases, the use of natural gas as feedstock to produce HDPE material is expected to increase significantly.

#### The Construction Industry holds the Largest Share of the Europe High Density Polyethylene (HDPE) market.

According to the Europe high density polyethylene (HDPE) market analysis, the construction sector leads in demand for HDPE plastics, driven by a rapid rise in new projects, as reflected in the growing gross value added (GVA) of the industry. According to Eurostat, the GVA of Europe's construction sector grew by 5.5% year-on-year in 2021, led by countries such as Hungary, Lithuania, Denmark, Germany and Finland. As the expansion further continues, the high density polyethylene (HDPE) demand growth is expected to grow significantly.

The growth of the Europe high density polyethylene market is being driven by its frequent use in the automobile industry, owing

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to its lightweight, durability, and resistance to impact and corrosion. Its applications in automotive manufacturing range from fuel tanks and bumpers to interior components like door panels, dashboards, and wiring insulation, especially in commercial vehicles such as vans and buses. In the first nine months of 2024, new van registrations in Europe grew by 8.5% whereas that for buses grew by 16%, indicating an increasing use of HDPE in the automobile industry.

#### Europe High Density Polyethylene (HDPE) Market Regional Analysis

The HDPE market in the United Kingdom, Germany, France, and Italy is experiencing significant growth, fueled by the expansion of the industrial sector and a strong focus on sustainability. Ireland in the United Kingdom recorded the maximum industrial growth, which reached 7.6% in July and 4.5% in August 2024. This was followed by Germany, France, and Italy which recorded 3.3%, 1.4% and 0.1% growth in August 2024 respectively.

Across all three regions, sustainability and circular economy principles are key factors influencing the industrial adoption of HDPE, particularly in the packaging, automotive, and consumer goods sectors. As e-commerce continues to rise, the demand for protective and recyclable packaging solutions increases, further supporting the Europe high density polyethylene (HDPE) market growth.

#### Competitive Landscape

The Europe high density polyethylene (HDPE) market key players are expanding their market scope due to rising demand for sustainable packaging, recycling efforts, greater use in consumer goods, advancements in production technologies, government regulations, growth in automotive applications, increased construction demand, and a shift towards bio-based HDPE.

#### Dow Inc.

Dow Inc. was founded in 1897 and is headquartered in Michigan, United States. It operates across various industries such as consumer goods and appliances, food and beverages, packaging, paper, and textile. The company is renowned for producing a diverse range of plastic and polymer products such as plastic additives, polyethylene, polyurethanes, speciality polymer compounds and more.

#### INEOS AG

INEOS AG started operations in 1998 and is currently a pioneer in the production of oil, natural gas, polymers, and chemicals. The company operates 36 brands across 194 production sites in 29 countries, serving customers in fast-growing markets such as packaging, infrastructure, mobility, and consumer applications.

#### Exxon Mobil Corporation

Exxon Mobil Corporation was founded in 1972 and is headquartered in the United States. It is one of the largest publicly traded petroleum and petrochemical manufacturers in the world, operating through popular global brands, Exxon, Mobil, and Esso, primarily serving the transportation, power, and lubricant industries.

#### LyondellBasell Industries N.V.

Founded in 1972 and headquartered in Houston, United States, LyondellBasell is a global leader in the chemical industry, dedicated to creating sustainable solutions with a strong focus on developing a circular and low-carbon economy. Its primary products include polymers and polyolefins used for a wide range of applications in transportation, food safety, water purification,

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and quality healthcare.

Other key players considered in the Europe high density polyethylene (HDPE) market report are TotalEnergies SE, Chevron Phillips Chemical Company LLC, Saudi Basic Industries Corporation (SABIC), Lotte Chemical Corp., LG Corp., Borealis AG, and Braskem S.A. among others.

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