

Biodegradable Plastics / Bioplastics (BP):



International Biodegradable Polymers
Association & Working Groups

Marienstrasse 19/20
D-10117 Berlin

Tel. + 49 (0) 30 / 28482 350

Fax + 49 (0) 30 / 28482 359

eMail: Info@IBAW.org

<http://www.IBAW.org>

31.08.2004

IBAW_BP-Market_EU_2003.doc

Market Development in Europe

It is important to understand that there are no official statistic data available so far. All figures given and conclusions made result from IBAW's conversation with its members – mainly with the BP manufacturers. All data therefore are estimations that might be viewed differently by third parties (variances).

The main reason for the obvious uncertainty is the very initial state of the market development. Products and technology still are evolving from the laboratories into the market places. In a 40 million tons of plastic market like Europe (EU 15) BP products can easily be overlooked today. First BP products already have entered big markets like packaging, agro-films or toys. The potential is enormous, but the market share still is very small. Trends can change easily and fast and framework conditions may have a big future impact on the market introduction. Improved framework conditions could help BP products to compete with conventional plastics in substitution markets.

IBAW, the industrial platform of the BP industries, therefore asks all partners to support this innovative material class during the period of market introduction. IBAW will provide with updated data from market development also in future.

IBAW estimations (in Tonnes):

- Total BP consumption 2001 (EU 15): 20,000
- Total BP consumption 2003 (EU 15): 35,000–40,000
- Total consumption of BP loose fill (starch foam); 2003 (EU 15): 10,000–15,000
- Total consumption of BP films (all applications: Packaging and agro, including biowaste bags, rigid and flexible films) in 2003 (EU 15): 20,000–25,000
- Total consumption of BP packaging (waste bags/loose fill excluded) in 2003 (EU 15): 5,000–10,000 (Compare with 2001: < 1,000, means: a new market)

- Total consumption of BP films used for specific applications where biodegradability / compostability plays a most important role (biowaste bags, mulch film) in 2003 (EU 15): 15,000–20,000
- Mulch film as well as film packaging are new products with strong growth rates
- In most of the products the RRM share used for the manufacture is significant (40-95%)
- EU Countries:
 - No specific data available
 - Packaging market (for films) started in the UK (2001/2002), I, B, NL, CH followed
 - Loose fill is already quite common (market size small compared to packfilms)
 - Mulchfilm is mainly used in France/Italy/Spain/BeNeLux
 - Biodegradable biowaste collection bags are mainly used in almost all EU countries (still strong growth and potential).

If you need more information / grafics / fotos do not hesitate to contact us.



Starch-based packaging at A. Heijn supermarkets, Netherland (Foto natura)