Commodity [Inside]

Analysis of commodities and end-users

The Global Metal Packaging Market out to 2026

Commodity Inside

Table of contents

Table of contents

Table of contents

Table of contents

Table of contents

List of tables

Table of contents

Table of contents

Table of contents

Table of contents

List of figures

Table of contents

Table of contents

Table of contents

Table of contents

1.5 Methodology

We have used a broad range of primary and secondary data to assess the market for the metal packaging in both volume and value terms as well as its end use markets. The starting point of our research was employing a literature review and extensive market research where we used a number of external sources, for instance, national and international industry associations, company reports and data, experts' opinions, trade statistics, end use sectors dynamics, industry news, policy documents, government bodies etc. We have then incorporated all our findings into our proprietary detailed excel based model which encompassed the whole world by regions and leading countries. We have developed numerous validation tools which continuously crossed checked the robustness of our historical data and forecasts.

For our market forecasts, we have developed Excel based forecast model which was underpinned by an econometric model. We have considered a number of variables in our forecasts including GDP, Population, GDP per capita income, urbanisation etc. In our forecast, we have also used SWOT analysis to understand the impact of various factors influencing the growth of the metal packaging industry.

Both our historical and forecast data have also been crossed checked in the context of upstream (substrate production and metal substitutes; various packaging materials such as rigid plastic packaging, flexible plastic packaging, glass packaging etc) and downstream (food, beverages, personal care, home care, healthcare, bulk etc) sectors. In addition, we have also taken into account the raw materials (substrates) such as tinplate production, primary aluminium (through smelters), semi-finished carbon steel production (slab) supply dynamics into our model.

We have also divided the metal packaging from the analysis point of view into two categories:

1- Light packaging: This mainly consists of aluminium, tinplate and aluminium foil. Main products which are included in this category are beverage cans, food cans, aerosols cans, general line cans, metal closures, trays, blister packaging, tabular and non-tabular containers and pouches.
2- Medium and heavy packaging: This is mainly made from carbon steel, alloy steel and stainless steel. Some main products included are drums, cylinders, pails etc.

Excerpts from Chapter 1

Chapter 4- South East Asia

4.1 Analysis of end use sectors and raw materials

Table 4.1: South East Asian metal packaging demand 2013-2026 (million tonnes, % change)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Demand														
% Change														
Global Share														

Figure 4.1: South East Asian metal packaging demand 2013-2026 (million tonnes)

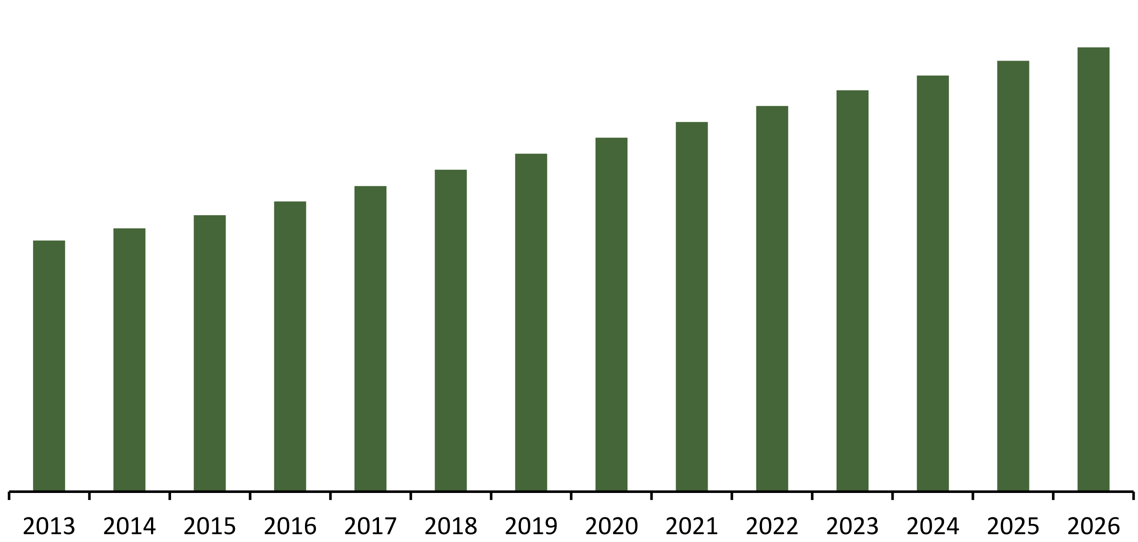

Table 4.3: South East Asian metal packaging demand by country 2013-2026 (million tonnes)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Thailand														
Indonesia														
Vietnam														
Malaysia														
Philippines														
Singapore														

Excerpts from Chapter 4

Table 4.5: Trend tracking scenarios in South East Asian metal packaging market: High (H), Low (L) and Medium (M) 2016-2020 and 2021-2026		
Positive trends	2016-2020	2021-2026
Processed food in metal packaging will see further uptick	High	Medium
Government will support the processed food industry to assist metal packaging		
Soft drinks will see significant demand growth for metal packaging		
Alcoholic drinks will see significant demand growth for metal packaging		
Significant investment is expected in food and beverage sectors which will support metal packaging products		
Multinational companies will invest through Greenfield/Brownfield in the metal packaging industry		
Healthcare industry will see notable rise in the aluminium foil consumption		
Aerosols will see significant increase in the personal care and homecare sectors		
Tubular and non-tubular containers will register a significant demand growth		
Demand of metal cylinders for LPG and industrial gases will increase		
Demand for steel drums in industrial waste, oil and industrial materials segments will increase significantly		
Metal packaging will establish its position as a premium packaging and challenge glass packaging in certain product categories		
Softened prices of steel and raw materials will underpin demand for steel drums against plastic drums		
Negative trends		
Plastic will pose a notable threat for metal packaging in FMCG/CPG		
Glass will pose a notable threat for metal packaging in FMCG/CPG		
Paper and paperboard will pose a notable threat for metal packaging in FMCG/CPG		
Higher imports of metal packaged consumer products and/or empty cans will negatively impact the domestic metal packaging industry		
Higher imports of metal packaging substrate (tinplate, aluminium and aluminium foil) will reduce the capacity utilisation of domestic suppliers		
Due to competition from alternative packaging and high capital cost will reduce chances for new production capacity in metal packaging		
Paints and varnishes in metal containers will see decline		
Aluminium foil will see further decline in cigarettes packaging due to government policies as well as from e-cigarettes		
Tinplate-made cans will see a drop in its market share due to threats from aluminium packaging and other alternative packaging types		
Demand for tinplate-made cans will notably reduce due to increasing costs and capacity closures		
Pet food will see falling demand for metal cans		

Excerpts from Chapter 4

Chapter 4- South East Asia

Table 4.7: Metal packaging demand segmentations by seven end use sectors in South East Asia 2015 and 2026 ($ billions)		
	2015	2026
Food		
Beverage		
Bulk		
Healthcare		
Household		
Personal care		
Others		

Table 4.8: Metal packaging demand segmentations by four substrates in South East Asia 2013- 2026 (million tonnes)														
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Tinplate														
Carbon/Alloy Steel														
Aluminium														
Aluminium foil														
Total														

Excerpts from Chapter 4

4.3 Market strategies and competitive landscapes

- South East Asia remained one of the most attractive regions for metal packaging producers due to potential high growth and low metal packaging intensity. Some major Japanese metal packaging manufacturers have also been shifting their attention to the region as a result of high market maturity in the Japanese metal packaging market.
- The region also provides opportunities regarding raw materials due to the presence of substrate suppliers in the region as well as proximity to high-grade substrates suppliers in North East Asia (China, Japan and South Korea). Furthermore, due to the ASEAN trading block, the region also provides an enormous growth potential for trade within the region.
- Ball is expecting to open its first aluminium beverage can plant in Myanmar in 2016. Crown Holdings is increasing its production capacity in its Thai’s and Vietnamese plants. Japan's Showa Denko contemplates increasing production capacity in Vietnamese plant by 50% to 2 billion cans a year by 2018. While Showa Aluminium Can is also strengthening its position in the Vietnamese market.
-

Excerpts from Chapter 4

Chapter 4- South East Asia

Indonesia	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Macroeconomic indicators														
Real GDP y/y growth (%)														
Real per capita GDP y/y growth (%)														
Population (Million)														
Population y/y growth (%)														
Glass packaging indicators														
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Glass packaging demand (million tonnes)														
Y/y growth (%)														
Regional Share (%)														
Global Share (%)														
Demand per person (kg)														
Demand per person (gram)														
World														
South East Asia														

Commodity [Inside]
Analysis of commodities and end-users

ORDER FORM

The Global Metal Packaging Market out to 2026	
Price	Package
Single user licence : £ 1,695 Departmental licence (2-5 users) : £ 2,995 Global user licence (over 5 users) :£ 4,995	
Total amount	£

Company details	Payment details
Name: ______	☐ Credit cards – Please debit my credit/ debit card
Position: ______	Card number: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _
Company: ______	Valid from: _ _ / _ _ to: _ _ / _ _ CSV Number: ______________
Address: ______	Card holders name: ______
Email: ______	Signed: ______________________ Date: __________
Phone:	☐ Direct Money Transfer –Invoice will be sent to the email address
VAT number (for EU sales only):	You are now able to choose from various payment options through our website. Please visit our website at www.commodityinside.com

For any questions please contact us at:
Sales@commodityinside.com or call +44 (0) 208 123 7812