

PRESS RELEASE

Sustainability – help or hindrance for high barrier films?

AMI, Bristol, 06/12/18 – Demand for high barrier films for food packaging is **growing faster** than regular packaging films in almost every part of the world according to a new report from industry consultants, AMI Consulting, published in November 2018. Defined as films which have oxygen permeability of less than 10cc m²/day, demand is being driven by several different drivers which vary from region to region. One of the most consistent trends though is the **sustainability** driver, which is acting as a key disruptor. With consumers increasingly questioning the use of plastics in general and in particular, those not widely recycled such as multilayer high barrier films, brand owners and retailers are calling for sustainable and recyclable solutions, which is influencing the **mix of substrates** as well as the **barrier methods** used for food packaging.

At the same time the prevention of **food waste** across the supply chain is also a major global concern. Providing a sufficient barrier against gases, aromas and flavours is imperative for the prevention of food waste, product loss in the supply chain and for maintaining food security. When provided with sufficient barriers, flexible films offer food manufacturers and retailers fantastic benefits for prolonging shelf-life, protecting product quality and easier transport and distribution thanks to their light weight, clarity and strength.

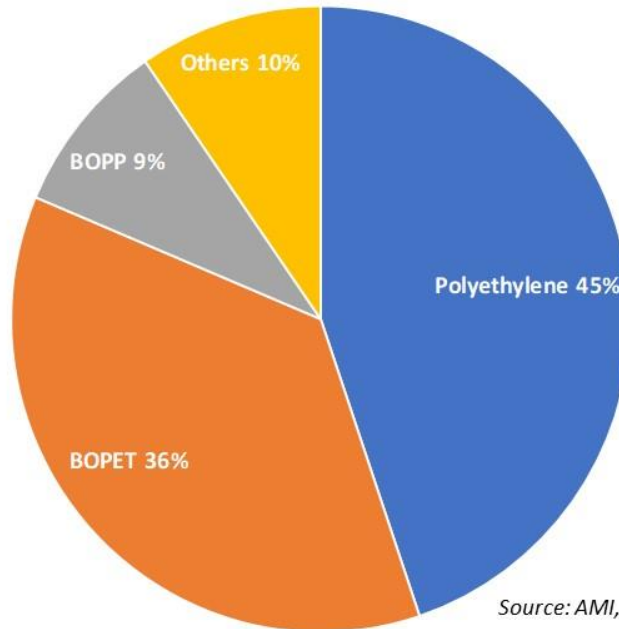
Other consumer trends helping to drive the market include **health and wellness**. Consumers seeking healthier food products are increasingly opting for fewer preservatives and additives. High barrier packaging films provide an alternative way to preserve the food and avoid the use of such ingredients.

AMI Consulting estimates that 8% of the 20 million plus tonnes of flexible films used for food packaging in 2018 were high barrier. Polyethylene forms the largest volume, thanks to its use in multilayer coextrusions with EVOH, followed by PET, which is mainly metallised for high barrier although the use of vacuum deposition of aluminium oxide or silicon oxide coatings to provide transparent barrier is growing rapidly. For BOPP, PVdC coating still provides the main method for improving oxygen barrier performance while producers are looking to develop coextruded or metallised grades to compete with the more widely used polyethylene and BOPET alternatives.

Film extruders and converters are investing in high barrier film technologies to capitalise on **value-added** options in an otherwise steady market for regular films where some categories are suffering from overcapacity. The costs of capital investment in high barrier films are coming down, making the market more accessible for those seeking to enter. This will help to drive demand but will also drive down the cost of films.

AMI's High Barrier Flexible Films for Food Packaging report investigates the **numerous solutions** on offer, how they are developing by region and by end-use applications and what the future scenarios might be.

**FIGURE 1:
 GLOBAL POLYMER FILM DEMAND FOR HIGH BARRIER FOOD PACKAGING IN 2018**



An AMI Consulting report – High barrier flexible films for food packaging 2018

This study is aimed at assisting industry participants and investors in anticipating change, formulating response strategies, directing R&D investment, and proactively managing the threats. It analyses the global market opportunity and reviews the industry structure. AMI's product portfolio catering to the high barrier flexible films industry includes specialist conferences in Europe ([Vienna](#), April and November 2019) and USA ([Chicago](#), June 2019).

FURTHER INFORMATION:

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Notes for Editors

One chart is attached for publication:

1. *Global polymer demand for high barrier food packaging 2018*