MEDIA RELEASE

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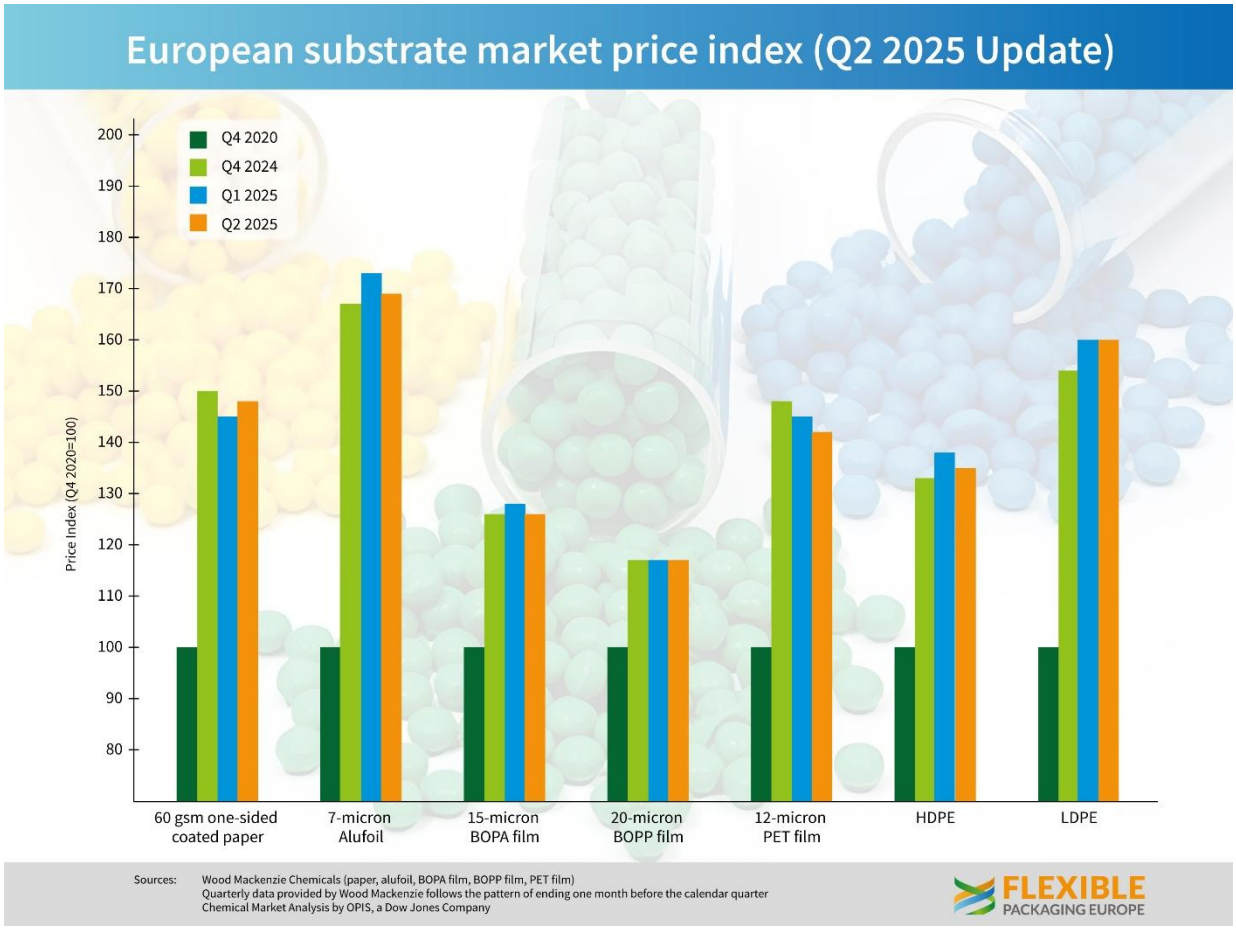
Flexible Packaging Materials: Price Trends Remain Volatile in Q2 2025

While prices for one-side coated paper (60 g/m²) increased by 2% compared to Q1 2025, confirming the upward trend, other materials experienced slight price declines: aluminium foil (7 micron) fell by 4%, BOPA film (15 micron) by 1%, and PET film (12 micron) by 2% compared to the previous quarter. BOPP film (20 micron) remained price stable. HDPE prices fell by 2%, while LDPE remained at the previous quarter's level. This is according to recent data from Flexible Packaging Europe (FPE).

Alexander Tkachenko, analyst at Wood Mackenzie, added market insights: "BOPET film decreased pricing by 5 ct/kg, largely from offshore producers. Price decreases were offered due to increased availability of shipping capacity from Asia to Europe and appreciation of the Euro against the US Dollar. Some European producers have not changed their prices this year. BOPP film prices have remained stable. Weak demand so far in 2025, similar to 2024. Less discretionary spending is affecting major BOPP film end-use markets such as snack foods. BOPA film: prices have come down by 5 ct/kg. Film prices went up rises in PA6 resin in March."



He continued: "Alufoil prices have come down by an average of 25 ct/kg. Fall is attributable to the LME ingot price coming down by around 17 EUR ct/kg, a 10 ct/kg fall in the west European spot warehouse premium and a 5 ct/kg reduction in conversion costs."

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Regarding the price trend of one-side coated paper (60 g/m²) for flexible packaging, Tkachenko added that prices paid in Europe increased by 3 ct and now range between €1.48 and €1.73/kg. “The increase is attributed to energy, labour and other production costs. Prices were expected to have increased by more in view of the industry’s low profitability”

Kaushik Mitra, Chemical Market Analytics by OPIS, added insights on LDPE and HDPE: “Markets were very volatile this quarter with a lot of fluctuations in prices even though the overall average of prices in Q2 was at par with Q1. Market volatility was contributed by uncertainty on tariff and geopolitics. Tariff uncertainty caused significant volatility when US and Europe trade tensions escalated with each targeting high tariffs on the other side. Briefly, the tariff disputed raised the spectre of supply disruption and shortage forcing some restocking. However, when US and Europe reached a truce and tariffs were paused for three months, prices cooled and the market normalized. Situation flared up again when geopolitics in the Middle East caused heightened tensions lifting prices of crude and feedstocks higher and pushed sentiments higher, lifting spot PE prices. But after tensions eased sentiments are once again back to normal. Q2-2025 demand was slightly better than Q1-2025 but lagging past years and macroeconomic weakness is weighing heavily on sentiments. With summer dip in demand starting next month, buyers played safe by keeping inventory low. Imports are higher, supply is smooth.”

Guido Aufdemkamp, Executive Director of Flexible Packaging Europe (FPE), summarizes:
“The flexible packaging materials market continues to be characterized by contrasting developments in Q2 2025. While some materials have seen price declines, others have shown moderate increases. We continue to feel the impact of geopolitical tensions, changing trade conditions, and macroeconomic uncertainty. At the same time, initial signs of stabilization are emerging in some application areas and send a cautiously positive signal for the second half of the year.”

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About Flexible Packaging Europe

Flexible Packaging Europe (FPE) is the industry association representing the interests of more than 80 small, medium-sized companies, and multinational manufacturers. Those operate with workforce of 57,000+ people at more than 350 sites all over Europe. The member companies account for more than 85% of European sales of flexible packaging made of different materials, mainly plastics, aluminium, and paper. More than half of all food products sold on the European retail markets are packed with flexible packaging.
More info at www.flexpack-europe.org.