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European aluminium foil industry with moderate growth in 2025 despite weaker year-end

The European aluminium foil industry recorded a moderate market recovery in 2025. Following the marked stabilisation seen in 2024, demand developed positively overall, although momentum weakened over the course of the year and the fourth quarter in particular proved more subdued.

Total deliveries of European aluminium foil production rose to 920,400 tonnes in 2025, representing an increase of 3.1% compared with 2024 (892,500 tonnes). These figures are based on the latest data from the European Aluminium Foil Association (EAFA).



Both the European domestic market and exports contributed to this growth. Deliveries within Europe increased by 2.6%, while exports outside the region rose by 7.2%.

After a strong start to the year, demand within Europe lost momentum in the second half. Packaging applications for chocolate and coffee were particularly affected, with demand declining significantly due to sharply rising raw material prices.

Production of thin aluminium foil below 60 µm, mainly used for flexible packaging and household applications, increased by 3% compared with 2024. However, the fourth quarter saw a notable decline in demand in this segment. Thin foil for packaging and household applications came under increasing pressure, partly as a result of US tariffs, overcapacity and intensifying competitive pressure from other

markets. In addition, stockpiling by customers outside Europe during the first half of the year contributed to weaker demand towards the end of the year.

Deliveries of thicker aluminium foil (61–200 µm), used for semi-rigid containers, industrial uses and technical applications, among others, rose by 3.4% compared with the previous year. At the same time, this segment also showed a slight weakening in demand in the fourth quarter. Overall, both thickness categories recorded low single-digit declines in the final quarter.

Göksal Güngör, Chair of the EAFA Roller Group, commented on the results: “Developments in 2025 show that the market has stabilised overall, even though individual segments remain volatile. In the packaging sector in particular, we are seeing a clear sensitivity to global trade conditions.”

The industry is therefore cautiously optimistic about the future. At the same time, uncertainties remain regarding the further development of demand, cost trends and the stability of global supply chains. New geopolitical tensions and areas of conflict – such as in the Middle East – also strongly affect logistics, energy prices and international trade flows.

The European aluminium foil industry therefore continues to operate in a challenging market environment but is once again demonstrating remarkable resilience.

The European Aluminium Foil Association (EAFA) is the most important industry association and represents in particular companies involved in the rolling and rewinding of aluminium foil and the production of semi-rigid aluminium foil containers and household foil in Europe. With more than 40 members, the organisation represents the entire aluminium foil rolling market in Europe. www.alufoil.org

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