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## Slow start to the year for aluminium foil – slight recovery over the course of the quarter

European aluminium foil rollers experienced a slow start into 2026, with the first quarter expected with weaker demand. However, a slight stabilisation became apparent as the quarter progressed.

Total deliveries by EAFA members amounted to approximately 225,000 tonnes in the first quarter of 2026, representing a decline of -6.6% compared with the same period last year. Shipment volumes therefore remain below the average levels recorded in the pre-crisis years prior to 2020.

Deliveries within Europe decreased by -4.3% year-on-year in the first quarter of 2026. While demand remained under considerable pressure at the beginning of the year, March in particular showed a positive trend compared with the two preceding months. Demand impulses mainly came from the flexible packaging sector: declines in certain product groups – such as chocolate-related applications affected by high raw material prices – were partially offset by stable or increasing demand in other segments, including dairy products.

A recovery was also observed in March for household foil products, following two weaker months. In addition, demand for foil used in technical applications recovered slightly. This is in line with cautious expectations of stabilisation in key customer industries such as the European automotive sector, which could benefit from new purchasing incentives, particularly in the field of electromobility.

Export business, by contrast, developed significantly more weakly. Shipments outside Europe fell sharply by -24.2% in the first quarter. The main reasons for this decline are increasing competitive pressure from Asian suppliers and trade policy measures, including US import tariffs. The conflict involving Iran, which intensified from March onwards, represents an additional factor of uncertainty.

Analysis by material thickness presents a mixed picture: thinner gauges, primarily used in packaging and household applications, recorded a decline of -5.9% in deliveries within Europe, while thicker gauges, mainly used for container and technical applications remained comparatively stable at -1.6%.

Despite, developments over the course of the quarter point towards a gradual stabilisation.

“Despite geopolitical uncertainties and changing cost structures, European foil rollers continue to supply their European customers reliably,” commented Guido Aufdemkamp, Executive Director of EAFA. “We expect a more positive development in the second and third quarter, so that despite the overall weak start into the year and the new conflict in the Gulf region affecting global trade, the total year to be stable in aluminium foil deliveries from European foil rollers.”

*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](http://www.alufoil.org)*

**Further Information:** Patrick Altenstrasser, Senior Manager Communication  
[communications@alufoil.org](mailto:communications@alufoil.org)