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Corrugated Boxes: Europe

February 2020



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Table of Contents

| | |
|----------------------------------------|-----------|
| 1. Highlights | 3 |
| 2. Market Environment | 4 |
| Historical Trends | 4 |
| Key Economic Indicators | 6 |
| Regional Overview | 7 |
| Recyclability | 8 |
| Demand by Country | 9 |
| 3. Segmentation & Forecasts | 11 |
| Markets | 11 |
| Food & Beverage | 13 |
| Nonfood Nondurable Goods | 14 |
| E-Commerce | 15 |
| Other Markets | 17 |
| Corrugated Box Supply & Demand | 19 |
| Containerboard Supply & Demand | 20 |
| 4. Industry Structure | 22 |
| Industry Characteristics | 22 |
| Market Leaders | 23 |
| DS Smith | 24 |
| Mondi | 24 |
| Smurfit Kappa | 25 |
| Stora Enso | 26 |
| 5. About This Report | 28 |
| Scope | 28 |
| Sources | 29 |
| Industry Codes | 30 |
| Freedonia Methodology | 30 |
| Resources | 32 |

List of Tables & Figures

| | |
|-----------------------------------------------------------------------------------------------------|----|
| Figure 1 Europe: Key Trends in the Corrugated Box Market, 2018 – 2023 | 3 |
| Figure 2 Europe: Corrugated Box Demand Trends, 2008 – 2018 | 5 |
| Table 1 Europe: Key Indicators for Corrugated Box Demand, 2008 – 2023 (2017US\$ bil) | 6 |
| Figure 3 Europe: Corrugated Box Demand by Country, 2018 (%) | 9 |
| Figure 4 Europe: Corrugated Box Demand by Market, 2008 – 2023 (bil sq mtr) | 11 |
| Table 2 Europe: Corrugated Box Demand by Market, 2008 – 2023 (mil sq mtr) | 11 |
| Figure 5 Europe: Corrugated Box Demand by Market, 2008 – 2023 (%) | 17 |
| Table 3 Europe: Corrugated Box Supply & Demand, 2008 – 2023 (mil sq mtr) | 19 |
| Table 4 Europe: Containerboard for Corrugated Boxes: Supply & Demand, 2008 – 2023 (000 m tons) | 21 |
| Table 5 Europe: Selected Suppliers to the Corrugated Box Market | 27 |
| Table 6 Countries in Western Europe | 29 |
| Table 7 Countries in Eastern Europe | 29 |
| Table 8 HS Codes Related to Corrugated Boxes | 30 |
| Table 9 NACE Codes Related to Corrugated Boxes | 30 |

About This Report

Scope

This report forecasts to 2023 corrugated box demand and shipments in square meters, and containerboard for corrugated boxes demand and shipments in metric tons in Europe.

Total corrugated box demand is segmented by market in terms of:

- food and beverage
- nonfood nondurable goods
- e-commerce
- other markets such as durable goods and catalog sales

To illustrate historical trends, total corrugated box demand is provided in annual series from 2008 to 2018; corrugated box shipments, containerboard for corrugated boxes demand and shipments, and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

This report analyzes the market for corrugated boxes and the main raw material used to make boxes, containerboard. Covered products include:

- corrugated boxes, including regular slotted containers and other corrugated containers such as die cut and five-panel folder boxes
- containerboard used to make boxes

Excluded from the scope of this report are:

- other paper packaging, including set-up boxes, mailers, paperboard folding cartons, protective packaging such as corrugated edge protectors and paper fill, and paper bags
- other disposable paper products, such as tissues, toilet paper, and paper foodservice products such as cartons, clamshells, boxes, buckets, cups, and straws
- corrugated board used to make products other than boxes, such as edge protectors and box partitions

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 6 | Countries in Western Europe

| Major Corrugated Box Markets | Other Western Europe | | |
|------------------------------|----------------------|---------------|---------------------------|
| Belgium | Andorra | Guernsey | Norway |
| France | Austria | Iceland | Portugal |
| Germany | Channel Islands | Ireland | Saint Pierre and Miquelon |
| Italy | Denmark | Isle of Man | San Marino |
| Netherlands | Faeroe Islands | Jersey | Sweden |
| Spain | Finland | Liechtenstein | Switzerland |
| United Kingdom | Gibraltar | Luxembourg | Vatican City |
| | Greece | Malta | |
| | Greenland | Monaco | |

Source: The Freedonia Group

Table 7 | Countries in Eastern Europe

| | | |
|------------------------|------------|----------|
| Albania | Hungary | Romania |
| Belarus | Latvia | Russia* |
| Bosnia and Herzegovina | Lithuania | Serbia |
| Bulgaria | Macedonia | Slovakia |
| Croatia | Moldova | Slovenia |
| Czech Republic | Montenegro | Ukraine |
| Estonia | Poland* | |

*Major corrugated box markets

Source: The Freedonia Group

Sources

Corrugated Boxes: Europe (FE30047) is based on *Global Corrugated Boxes*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

About This Report

- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | HS Codes Related to Corrugated Boxes

| HS Code | Definition |
|---------|-----------------------------------------------------------------------------------|
| 4819.10 | Paper and paperboard; cartons, boxes and cases, of corrugated paper or paperboard |

Source: United Nations Statistics Division

Table 9 | NACE Codes Related to Corrugated Boxes

| NACE Code | Definition |
|-----------|------------------------------------------------------------------------------------------|
| 17.12 | Manufacture of paper and paperboard |
| 17.21 | Manufacture of corrugated paper and paperboard and of containers of paper and paperboard |

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product

About This Report

lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Corrugated Boxes

Freedonia Industry Studies

Adhesives & Sealants in the US

Corrugated & Paperboard Boxes

Food & Beverage Packaging Innovation

Global Adhesives & Sealants

Global Bulk Packaging

Global E-Commerce

Global E-Commerce Packaging

Global Pharmaceutical Packaging

Global Pressure Sensitive Tapes

Global Protective Packaging

Produce Packaging Market in the US

Protective Packaging Market in the US

Retail-Ready Packaging

Rigid Bulk Packaging

Freedonia Focus Reports

Adhesives & Sealants: United Kingdom

Beverages: United States

E-Commerce: Canada

E-Commerce: United States

Global Demographics

Global Housing

Global Macroeconomy

Global Medium- & Heavy-Duty Trucks & Buses

Manufacturing: United States

Municipal Solid Waste: United States

Packaging Machinery: United States

Packaging: United States

Paper & Paperboard: United States

Paper Industry Machinery: United States

Processed Food: United States

Recovered Packaging: United States

Recovered Paper: United States

Freedonia Custom Research

Packaged Facts

Amazon Strategies and the Amazon Shopper
Pet Product Packaging Innovation

Trade Publications

Corrugated Today
Ecommerce Magazine
E-Commerce Times
Packaging Digest
Packaging Strategies
Packaging World

Agencies & Associations

American Forest & Paper Association
Bureau of International Recycling
Ecommerce Foundation
European Federation of Corrugated Board Manufacturers
Eurostat
Fibre Box Association
Food and Agriculture Organization of the United Nations
Global Recycling Foundation
The Independent Packaging Association
International Corrugated Case Association
International Monetary Fund
National Waste & Recycling Association
Organisation for Economic Co-operation and Development
PAC Packaging Consortium
United Nations Comtrade
World Bank