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World Corrugated Boxes

Industry Study with Forecasts for **2019 & 2024**

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World Corrugated Boxes

Industry Study with Forecasts for ***2019 & 2024***

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RAW MATERIALS

OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Corrugated Boxes

Industry Study with Forecasts for ***2019 & 2024***

Demand will be driven by growing use of corrugated boxes for product packaging and transportation in developing areas, and by strong growth in e-commerce and retail-ready packaging in developed countries.

World demand to rise 3.7% annually through 2019

World demand for corrugated boxes is expected to increase 3.7 percent per year through 2019, approaching 260 billion square meters. In developed countries, box demand tends to track overall economic growth and industrial production trends and, as a result, will continue to be relatively slow growing. In developing economies, especially those in Asia and the Africa/Mideast region, growth will be more robust as manufacturers in these areas use corrugated boxes more intensively for product packaging and transportation, in part because boxes are still gaining market share from wood crates.

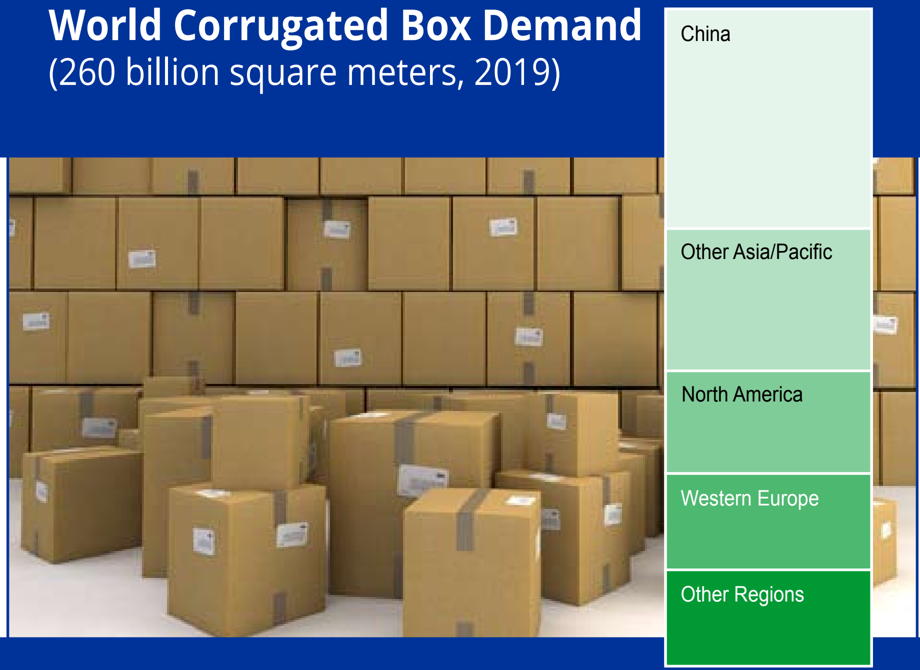
In nearly all regions, strong growth in e-commerce will drive corrugated box usage, as will the growing popularity of retail-ready packaging. Retail-ready packaging has become increasingly popular in more affluent countries because of the time and labor cost savings it offers. Corrugated boxes will continue to benefit from their sustainability, good environmental image, and low cost compared to competitive products.

Asia/Pacific, Africa/Mideast regions to grow the fastest

The Asia/Pacific region accounted for half of global corrugated box demand in 2014, with China alone representing almost 30 percent. Growth in the Chinese market is expected to slow going forward as growth in manufacturing activity moderates. Despite this deceleration, China will still post one of the fastest growth rates for box demand. Other countries in Asia expected to see strong gains include India, the Philippines, Thailand, and Vietnam.

The Africa/Mideast region will offer the fastest growth among the six world regions, but will continue to account for less than five percent of global corrugated box demand. While there are a few appreciable box markets in the region, such as South Africa and Turkey, most countries, including the wealthier nations such as Israel and some of the Gulf states, do not yet have manufacturing sectors large enough to support substantial corrugated box sales.

World Corrugated Box Demand
(260 billion square meters, 2019)



Box lightweighting to limit containerboard demand

Demand for containerboard used in corrugated box production will continue to grow more slowly than global box output due to product lightweighting. Western Europe has been at the forefront of these efforts due to the region's strong environmental focus and sophisticated manufacturing techniques, with box weights in Western Europe currently only about 80 percent of those seen in the US. However, the lightweighting trend is growing more rapidly elsewhere in the world, leading to lagging growth for containerboard in some markets.

World Corrugated Boxes

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Containerboard Trends

Demand for containerboard for corrugated boxes in Chi
jected to increase 4 ... 1 m
ric tons, slowing f ... de
still among the fas ... ro
shipments, reflecti ... eig
China's historical ... b
ated ample room f ... he
ic region, recycled ... alt
of virgin linerboard and semichemical corrugated medium is
increase, in part due to the need to produce boxes commensu
performance expectations of export markets for products ma
in China.

SAMPLE TEXT

China is among the world's largest importers of containerboard. In 2014, that deficit amounted to 550,000 metric tons. The deficit bulged in the 1990s and 2000s as domestic box production increased, but has since been whittled away by substantial increases in containerboard capacity. Still, China depends on imports for an appreciable share of its containerboard requirements. Leading import sources include Australia, Russia, the US, and several countries within the Asia/Pacific region. Although China is a net importer of containerboard, it does export containerboard, with Iran among the leading export destinations.

China's trade gap in containerboard will narrow throug
additional domestic board capacity featuring higher-quality p
equipment is able to produce better-performing board. Cont
production will outpace consumption slightly through the fo
riod, rising ... metric tons.

SAMPLE TEXT

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TABLE VI-7

GERMANY: CORRUGATED BOX SUPPLY & DEMAND
(million square meters)

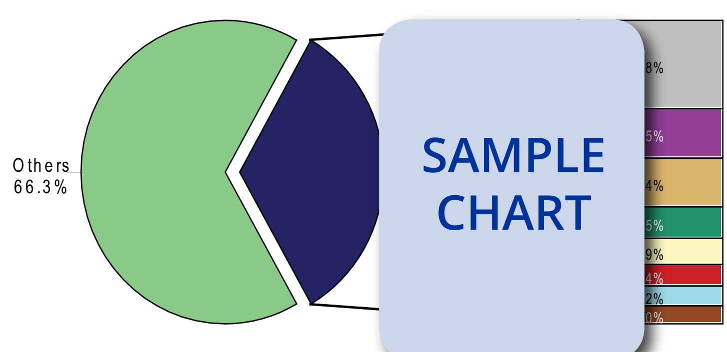
Item	2004	2009	2014	2019	2024
Population (mil persons)					
$ GDP/capita					
Gross Domestic Product (bil 2013$)					
% manufacturing					
Manufacturing Value Added (bil 2013$)					
m2/capita					
m2/000$ MVA					
Corrugated Box Demand					
Food & Beverages					
Nonfood Nondurable Goods					
Other Markets					
+net exports					
Corrugated Box Shipments					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART IX-2

WORLD CONTAINERBOARD MARKET SHARE, 2014
(146 million metric tons)



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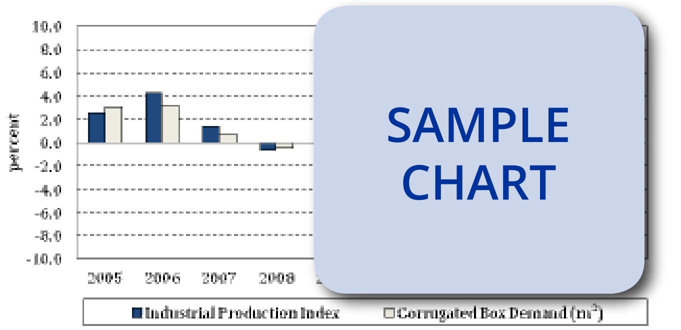
Sample Profile & Table, & Study Coverage

CHART V-6

MEXICO: INDUSTRIAL PRODUCTION INDEX & CORRUGATED BOX DEMAND, 2005-2014
(percent change)



Source: The Freedonia Group, Inc., Oxford Economics

COMPANY PROFILES

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01117 Oyonnax
France
33-4-747
www.em

Annual S
Employ
Key Pro — d corrugated boxes,
trays, po — ecialty containers,
and relat

SAMPLE PROFILE

Emin Leydier is an integrated packaging group involved in the manufacture and distribution of containerboard, corrugated sheet, and corrugated packaging. The privately held company operates through four businesses: Emin Leydier Papeteries, Emin Leydier Emballages, Emin Leydier Services, and ELYTRA.

The Company is active in the world corrugated box industry through the Emin Leydier Papeteries, Emin Leydier Emballages, and ELYTRA businesses. In addition to these operations, Emin Leydier maintains distribution and sales outlets in France, the United Kingdom, Spain, and Italy. The Emin Leydier Papeteries business (France) makes 100-percent recycled paper from recovered paper and containerboard and sells it for use in the manufacture of corrugated cardboard and packaging products. Representative products include ONDULSTAR fluting paper; ONDULIGHT lightweight fluting paper; LEYDLINER 4 testliner, which ranges from 100 to 280 grams per square meter; and FLUTESTAR high-performance fluting paper, which ranges from 115 to 150 grams per square meter. The business, which employs about 370, maintains paper mills in Laveyron and Nogent-sur-Seine, France having a combined annual production capacity of 750,000 metric tons.

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STUDY COVERAGE

World Corrugated Boxes is a Freedonia study that presents historical supply and demand data for 2004, 2009 and 2014, as well as forecasts for 2019 and 2024, for corrugated boxes and containerboard in 6 regions and 27 countries. In addition, this study considers market environment factors, assesses industry structure, evaluates company market share and profiles 30 industry competitors worldwide.

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Related Studies

Food Containers: Rigid & Flexible

This study analyzes the US rigid and flexible food container industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by market (e.g., fruits and vegetables, dairy products, grain mill products, meat products, baked goods, sauces and condiments, snack foods, candy and confections, frozen specialties) and container/material type (e.g., bags and pouches, paperboard, plastic, metal, glass). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3367............. February 2016.................$5400

Produce Packaging

Demand for produce packaging in the US is forecast to increase 3.2 percent annually to $6.0 billion in 2019. Plastic containers and stand-up pouches will be among the fastest growing package formats, based on their aesthetic appeal and capability to increase brand marketing and recognition. Corrugated boxes will remain the leading type. This study analyzes the $5.1 billion US produce packaging industry, with forecasts for 2019 and 2024 by packaging type, application and end user. The study also evaluates company market share and profiles industry players.

#3319................August 2015...................$5300

Pallets

The total number of pallets in use in the US will grow 1.7 percent annually through 2019 to 1.4 billion units. Wood will remain the dominant material but plastic, metal and corrugated paper pallets will grow faster and gain market share, albeit from small bases. Manufacturing will remain the dominant market, but warehousing will grow the fastest. This study analyzes the 1.3 billion unit US pallet industry, with forecasts for 2019 and 2024 by material, source, product, market and US region. The study also evaluates company market share and profiles industry competitors.

#3314................August 2015...................$5300

Wine Packaging

Demand for wine packaging in the US will increase 4.4 percent annually to $3.0 billion in 2019. Glass bottles will remain dominant but will face increasing competition from alternative formats and sizes, such as single-serving plastic bottles, aseptic cartons, aluminum cans, and cups and goblets, as well as bag-in-box packaging. This study analyzes the $2.4 billion US wine packaging industry, with forecasts for 2019 and 2024 by container, closure, accessory and bulk packaging type. The study also evaluates company market share and profiles industry competitors.

#3308................August 2015...................$5300

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.6 percent per year to $39.4 billion in 2018. Corrugated and solid fiber boxes will remain the largest and fastest growing product segment. The food and beverage market will remain dominant, based in part on more value-added boxes such as display ready and moisture-resistant types. This study analyzes the $34.7 billion US corrugated and paperboard box industry, with forecasts for 2018 and 2023 by material, product and market. The study also evaluates company market shares and profiles industry players.

#3235............ December 2014................$5300

About The Freedonia Group

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