



European Federation of
Corrugated Board Manufacturers

Annual Statistics 2009

FEFCO ANNUAL STATISTICS 2009

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FEFCO ANNUAL REPORT 2009 Key Statistics

	2008	2009	% Change
Total Shipments (Millions of m ²) (including Non-Members)	40,833	38,829	-4.90
Total Shipments ('000 Tonnes) (including Non-Members)	21,690	20,569	-5.20
Shipments of Member Companies (Millions of m ²)	35,486	33,167	-6.50
Shipments of Member Companies ('000 Tonnes)	18,844	17,559	-7.30
Total Number of Companies (including Non-Members)	426	416	-2.40
Total Number of Plants (including Non-Members)	697	692	-0.70
Average Weight of Board in g/m ² (including Non-Members)	531	530	-0.20
Die Cut Boxes (as % of Total Shipments in m ²) (including Non-Members & Sheetplants)	27.0	29.0	1.80
Shipments in Sheets (as % of Total Shipments in m ²) (including Non-Members)	17.7	17.1	-9.10
Total Consumption of Raw Materials ('000 Tonnes) (including Non-Members)	23,426	22,308	-4.80
Consumption of Kraftliner as % of Total Consumption of Raw Materials	4.9	5.1	3.90
Consumption of Brown Kraftliner as % of Total Consumption of Raw Materials	14.5	15.1	4.00
Consumption of Testliner as % of Total Consumption of Raw Materials	31.9	32.6	2.10
Consumption of Other Recycled Liner as % of Total Consumption of Raw Materials	10.6	9.5	-11.60
Consumption of Semi-chemical Fluting as % of Total Consumption of Raw Materials	8.3	8.2	-1.20
Consumption of Recycled Fluting as % of Total Consumption of Raw Materials	29.9	29.5	-1.40
Total Personnel	90,616	87,814	-3.20

**Total Shipments in Millions of m²
(including Non-Members)**

	2008	2009	% Change 2008/2009	Members Only
Austria	926	870	-6.05	Y / Y
Belgium	1,006	938	-6.76	N / N
Czech Republic	851	779	-8.46	N / N
Denmark	440	384	-12.73	Y / Y
Finland	317	273	-13.88	Y / Y
France	5,303	5,014	-5.45	N / N
Germany	8,753	8,225	-6.03	N / N
Hungary	481	467	-2.91	N / N
Italy	6,380	6,054	-5.11	N / N
Netherlands	1,161	1,105	-4.82	N / N
Norway	199	194	-2.51	Y / Y
Poland	2,480	2,559	3.19	N / N
Romania	421	398	-5.46	N / N
Slovakia	162	119	-26.54	Y / Y
Spain	4,419	4,022	-8.98	N / N
Sweden	669	619	-7.47	Y / Y
Switzerland	476	448	-5.88	Y / Y
Turkey	2,505	2,550	1.80	N / N
United Kingdom	3,884	3,811	-1.88	N / N
TOTAL EUROPE	40,833	38,829	-4.90	

**Total Shipments in 000's Tonnes
(including Non-Members)**

	2008	2009	% Change 2008/2009
Austria	452	424	-6.19
Belgium	543	499	-8.10
Czech Republic	422	386	-8.53
Denmark	233	203	-12.88
Finland	159	137	-13.84
France	2,833	2,675	-5.58
Germany	4,583	4,351	-5.06
Hungary	250	243	-2.80
Italy	3,705	3,484	-5.96
Netherlands	660	613	-7.12
Norway	98	94	-4.08
Poland	1,257	1,325	5.41
Romania	198	187	-5.56
Slovakia	80	58	-27.50
Spain	2,406	2,215	-7.94
Sweden	329	307	-6.69
Switzerland	244	229	-6.15
Turkey	1,405	1,389	-1.14
United Kingdom	1,833	1,750	-4.53
TOTAL EUROPE	21,690	20,569	-5.20

Shipments of Member Companies in Millions of m²

	2008	2009	% Change 2008/2009
Austria	926	870	-6.05
Belgium	855	798	-6.67
Czech Republic	547	475	-13.16
Denmark	440	384	-12.73
Finland	317	273	-13.88
France	4,605	4,355	-5.43
Germany	7,328	6,605	-9.87
Hungary	461	447	-3.04
Italy	5,627	5,305	-5.72
Netherlands	1,096	1,017	-7.21
Norway	199	194	-2.51
Poland	1,914	1,976	3.24
Romania	402	369	-8.21
Slovakia	162	119	-26.54
Spain	4,068	3,702	-9.00
Sweden	669	619	-7.47
Switzerland	476	448	-5.88
Turkey	1,813	1,838	1.38
United Kingdom	3,581	3,373	-5.81
Membership Total	35,486	33,167	-6.50

Shipments of Member Companies in 000's Tonnes

	Membership 2008		Membership 2009	
	Tonnes	% of Total Shipments	Tonnes	% of Total Shipments
Austria	452	100.00	424	100.00
Belgium	462	85.08	424	84.97
Czech Republic	272	64.45	236	61.14
Denmark	233	100.00	203	100.00
Finland	159	100.00	137	100.00
France	2,461	86.87	2,323	86.84
Germany	3,835	83.68	3,459	79.50
Hungary	239	95.60	232	95.47
Italy	3,298	89.01	3,093	88.78
Netherlands	619	93.79	564	92.01
Norway	98	100.00	94	100.00
Poland	966	76.85	1,019	76.91
Romania	188	94.95	172	91.98
Slovakia	80	100.00	58	100.00
Spain	2,215	92.06	2,039	92.05
Sweden	329	100.00	307	100.00
Switzerland	244	100.00	229	100.00
Turkey	1,016	72.31	1,001	72.07
United Kingdom	1,678	91.54	1,545	88.29
Membership Total	18,844	86.90	17,559	85.40

Total Number of Companies (including Non-Members)

	2008	2009
Austria	8	8
Belgium	9	9
Czech Republic	7	7
Denmark	n.a.	n.a.
Finland	3	3
France	19	19
Germany	39	39
Hungary	6	6
Italy	59	59
Netherlands	9	9
Norway	3	3
Poland	32	34
Romania	12	11
Slovakia	3	3
Spain	81	81
Sweden	4	4
Switzerland	6	6
Turkey	101	91
United Kingdom	25	24
TOTAL EUROPE	426	416

Total Number of Plants (including Non-Members)

	2008	2009
Austria	11	11
Belgium	12	12
Czech Republic	9	9
Denmark	n.a.	n.a.
Finland	5	5
France	75	75
Germany	112	111
Hungary	11	11
Italy	88	88
Netherlands	15	15
Norway	3	3
Poland	43	47
Romania	13	12
Slovakia	3	3
Spain	96	95
Sweden	12	12
Switzerland	8	8
Turkey	116	113
United Kingdom	65	62
TOTAL EUROPE	697	692

Total Number of Corrugators (including Non-Members)

	2009			Result
	<2m	>2 <2,5m	> 2,5m	
Austria	1	8	2	11
Belgium	0	14	4	18
Czech Republic	1	8	1	10
Denmark	n.a.	n.a.	n.a.	n.a.
Finland	1	3	1	5
France	4	70	8	82
Germany	13	80	18	111
Hungary	2	8	0	10
Italy	9	86	12	107
Netherlands	0	14	1	15
Norway	0	3	0	3
Poland	3	17	7	27
Romania	1	11	0	12
Slovakia	2	2	0	4
Spain	15	87	2	104
Sweden	0	10	1	11
Switzerland	3	6	0	9
Turkey	75	46	2	123
United Kingdom	13	41	18	72
TOTAL EUROPE	143	514	77	0

**Average Weight of Board in g/m²
(including Non-Members)**

	2008	2009
Austria	488	487
Belgium	540	532
Czech Republic	496	496
Denmark	530	529
Finland	502	502
France	534	534
Germany	524	529
Hungary	520	520
Italy	581	575
Netherlands	568	555
Norway	492	485
Poland	507	518
Romania	470	470
Slovakia	494	487
Spain	544	551
Sweden	492	496
Switzerland	513	511
Turkey	561	545
United Kingdom	472	459
TOTAL EUROPE as weighted average	531	530

Die Cut Boxes
(as % of Total Shipments in m²)
(including Non-Members & Sheetplants)

	2008	2009
Austria	56.6	57.4
Belgium	39.3	44.9
Czech Republic	44.9	43.4
Denmark	0.0	0.0
Finland	60.7	61.5
France	0.0	0.0
Germany	40.6	46.0
Hungary	42.4	32.1
Italy	0.0	0.0
Netherlands	43.4	54.7
Norway	52.5	54.2
Poland	33.8	42.5
Romania	24.7	30.2
Slovakia	43.0	46.0
Spain	45.0	46.0
Sweden	0.0	0.0
Switzerland	57.1	52.2
Turkey	34.0	30.5
United Kingdom	27.3	27.6
TOTAL EUROPE as weighted average	27.0	29.0

**Shipments in Sheets
(as % of Total Shipments in m²)
(including Non-Members)**

	2008	2009
Austria	12.3	11.2
Belgium	5.2	6.3
Czech Republic	21.0	15.0
Denmark	0.0	0.0
Finland	7.6	7.6
France	0.0	0.0
Germany	14.5	11.4
Hungary	19.9	31.4
Italy	0.0	0.0
Netherlands	8.6	9.0
Norway	5.2	4.7
Poland	31.2	26.9
Romania	41.6	35.5
Slovakia	0.0	0.0
Spain	18.2	16.3
Sweden	0.0	6.8
Switzerland	7.6	6.6
Turkey	100.0	100.0
United Kingdom	28.5	28.5
TOTAL EUROPE as weighted average	17.7	17.1

Total Consumption of Raw Materials in 000's Tonnes (including Non-Members)

	2008	2009	% Change 2008/2009
Austria	519.0	491.0	-5.39
Belgium	489.0	459.0	-6.13
Czech Republic	477.0	407.0	-14.68
Denmark	0.0	0.0	n.a.
Finland	174.0	148.0	-14.94
France	3,212.0	3,099.0	-3.52
Germany	4,852.0	4,590.0	-5.40
Hungary	266.0	267.0	0.38
Italy	3,816.0	3,589.0	-5.95
Netherlands	727.0	675.0	-7.15
Norway	106.0	102.0	-3.77
Poland	1,424.0	1,615.0	13.41
Romania	210.0	178.0	-15.24
Slovakia	90.0	65.0	-27.78
Spain	2,669.0	2,457.0	-7.94
Sweden	383.0	356.0	-7.05
Switzerland	278.0	206.0	-25.90
Turkey	1,563.0	1,553.0	-0.64
United Kingdom	2,171.0	2,051.0	-5.53
TOTAL EUROPE	23,426.0	22,308.0	-4.80

**Consumption of Kraftliner
(as % of the Total Consumption of Raw Materials)
(including white and coloured kraft)**

	2008	2009
Austria	6.1	7.2
Belgium	5.9	5.8
Czech Republic	3.7	3.1
Denmark	0.0	0.0
Finland	12.7	13.5
France	3.5	3.5
Germany	5.7	5.9
Hungary	4.3	3.3
Italy	4.4	5.0
Netherlands	7.4	6.9
Norway	11.8	9.8
Poland	0.9	0.9
Romania	1.0	1.0
Slovakia	2.0	1.8
Spain	5.1	5.4
Sweden	14.5	13.6
Switzerland	6.4	7.0
Turkey	0.5	1.4
United Kingdom	8.4	8.6
TOTAL EUROPE as weighted average	4.9	5.1

**Consumption of Brown Kraftliner
(as % of the Total Consumption of Raw Materials)**

	2008	2009
Austria	14.0	13.4
Belgium	10.5	11.6
Czech Republic	8.4	9.4
Denmark	0.0	0.0
Finland	15.2	14.0
France	9.3	9.8
Germany	14.6	14.4
Hungary	16.4	15.6
Italy	17.4	20.0
Netherlands	15.6	15.4
Norway	16.6	7.8
Poland	6.9	9.5
Romania	7.5	11.5
Slovakia	11.6	10.7
Spain	15.0	16.0
Sweden	14.5	13.6
Switzerland	18.0	19.1
Turkey	25.8	25.8
United Kingdom	14.7	14.6
TOTAL EUROPE as weighted average	14.5	15.1

Consumption of Testliner (as % of the Total Consumption of Raw Materials)

	2008	2009
Austria	34.8	35.1
Belgium	38.7	38.0
Czech Republic	40.5	43.0
Denmark	0.0	0.0
Finland	32.0	32.7
France	40.0	43.1
Germany	37.6	38.4
Hungary	35.0	33.9
Italy	21.4	19.0
Netherlands	36.3	38.5
Norway	34.3	43.9
Poland	49.8	45.0
Romania	31.8	35.9
Slovakia	40.2	43.6
Spain	12.8	15.7
Sweden	18.5	19.1
Switzerland	32.9	36.2
Turkey	20.1	20.8
United Kingdom	41.4	41.5
TOTAL EUROPE as weighted average	31.9	32.6

Consumption of Other Recycled Liner (as % of the Total Consumption of Raw Materials)

	2008	2009
Austria	7.3	6.1
Belgium	1.4	0.8
Czech Republic	11.5	3.7
Denmark	0.0	0.0
Finland	2.8	2.0
France	13.0	11.6
Germany	3.1	2.4
Hungary	6.3	9.5
Italy	7.3	7.2
Netherlands	0.8	0.8
Norway	2.0	1.3
Poland	2.4	5.8
Romania	19.3	24.5
Slovakia	0.8	0.2
Spain	25.7	21.3
Sweden	18.5	19.1
Switzerland	6.9	1.1
Turkey	41.4	37.5
United Kingdom	0.0	0.0
TOTAL EUROPE as weighted average	10.6	9.5

Consumption of Semi-Chemical Fluting (as % of the Total Consumption of Raw Materials)

	2008	2009
Austria	9.9	10.0
Belgium	1.8	1.4
Czech Republic	3.9	3.6
Denmark	0.0	0.0
Finland	28.4	27.4
France	2.7	2.0
Germany	2.3	2.3
Hungary	4.5	4.4
Italy	13.7	14.1
Netherlands	1.4	0.8
Norway	19.0	13.1
Poland	3.3	1.9
Romania	10.3	7.3
Slovakia	8.6	3.1
Spain	26.3	27.5
Sweden	20.0	18.8
Switzerland	4.0	1.2
Turkey	8.3	12.2
United Kingdom	2.4	1.8
TOTAL EUROPE as weighted average	8.3	8.2

**Consumption of Recycled Fluting
(as % of the Total Consumption of Raw Materials)**

	2008	2009
Austria	27.9	28.2
Belgium	41.8	42.4
Czech Republic	32.0	37.2
Denmark	0.0	0.0
Finland	8.9	10.4
France	31.5	30.0
Germany	36.7	36.6
Hungary	33.5	33.3
Italy	35.8	34.7
Netherlands	38.5	37.6
Norway	16.3	24.1
Poland	36.8	36.9
Romania	30.1	19.8
Slovakia	36.8	40.6
Spain	15.3	14.1
Sweden	14.0	15.8
Switzerland	31.8	35.4
Turkey	3.9	2.3
United Kingdom	33.1	33.5
TOTAL EUROPE as weighted average	29.9	29.5

Total Number of Personnel

	2008		2009	
	Production Employees	Total Employees	Production Employees	Total Employees
Austria	1,464	1,946	1,387	1,877
Belgium	1,810	2,351	1,734	2,234
Czech Republic	1,383	1,859	1,179	1,683
Denmark	0	0	0	0
Finland	798	1,025	722	947
France	7,750	10,950	7,250	10,230
Germany	12,978	18,000	12,783	17,829
Hungary	1,056	1,360	1,012	1,379
Italy	6,265	13,495	5,981	13,292
Netherlands	1,443	2,181	1,428	1,428
Norway	444	617	434	610
Poland	3,482	5,406	3,358	5,359
Romania	1,131	1,515	1,445	1,965
Slovakia	292	674	260	610
Spain	8,152	10,488	7,597	10,042
Sweden	1,374	1,937	1,266	1,805
Switzerland	945	1,362	903	1,320
Turkey	4,786	6,668	5,762	7,544
United Kingdom	5,782	8,782	5,040	7,660
TOTAL EUROPE	61,335	90,616	59,541	87,814

Production per Head in 1000 m²

	2008	2009
Austria	633	627
Belgium	556	541
Czech Republic	615	661
Denmark	n.a.	n.a.
Finland	397	378
France	684	692
Germany	674	643
Hungary	455	461
Italy	1,018	1,012
Netherlands	805	774
Norway	448	447
Poland	712	762
Romania	372	275
Slovakia	555	458
Spain	542	529
Sweden	487	489
Switzerland	504	496
Turkey	523	443
United Kingdom	672	756
TOTAL EUROPE	666	652

Nominal Working Time and Productivity per Head

	Working Time [hours / year]		Productivity [m ² /man hour]	
	2008	2009	2008	2009
Austria	1,703	1,695	372	370
Belgium	1,239	1,293	449	418
Czech Republic	1,863	1,818	330	364
Denmark	0	1,620	n.a.	n.a.
Finland	1,709	1,694	232	223
France	1,820	1,813	376	382
Germany	1,850	1,850	364	348
Hungary	1,793	1,805	254	255
Italy	1,888	1,768	539	572
Netherlands	0	0	n.a.	n.a.
Norway	1,725	1,725	260	259
Poland	2,018	2,024	353	376
Romania	1,647	1,795	226	153
Slovakia	1,875	1,875	296	244
Spain	1,776	1,776	305	298
Sweden	1,494	1,500	326	326
Switzerland	2,026	2,014	249	246
Turkey	0	0	n.a.	n.a.
United Kingdom	1,710	1,710	393	442
TOTAL EUROPE	1,481	1,567	333	330